

nunix training

NUIX DISCOVER CASE MANAGER THREE DAY · INSTRUCTOR LED CLASS

The Nunix Discover Case Manager certification class is designed to introduce students to managing and administering Nunix Discover cases including:

- Data processing, import and file repositories
- Data enrichment and imaging
- General administration (such as managing workspaces and templates)
- Manage groups and security
- Configure cases for effective document review and managing document analysis tools
- Create and manage productions
- Report on review progress and statistics
- Export and document deletion

Students will be enrolled in the Nunix Discover Case Manager exam. The Nunix Discover Case Manager is a requisite class for the Nunix Discover Certified Master pathway.

MODULE 1: COURSE INTRODUCTION & GETTING STARTED

- Class Introductions
- Course Objectives
- Case Manager Security Role Overview
- Nuix Discover Online Help

MODULE 2: DATA PROCESSING

- Ingestions Overview
- Configure Default Ingestion Settings
- Stage & Upload Data
- Ingestions Jobs
 - Add/Edit
 - View
 - Monitor
- Report
- Exceptions
- Unprocessed Files

MODULE 3: IMPORTING DATA

- Imports List
 - View Jobs
 - Add/Delete
 - Clone
- Discover Import
 - Discover Load File Overview
 - Upload & Evaluate Files
 - Ringtail Import Wizard
 - Errors

- Flat File Import
 - Flat File Overview
 - Upload & Evaluate Files
 - Flat File Import Wizard
 - Errors

MODULE 4: WORKING WITH FILE REPOSITORIES

- File Repositories Overview
 - Upload Files
 - Browse Repositories
 - Folders
 - Add Folder
 - Calculate Size
- Files and Folders
 - Move/Copy/Rename
 - Compress/Extract
 - Download/Delete
 - Upload Files
 - Archive/Restore

MODULE 5: PERFORMING DATA ENRICHMENT

- OCR Processing
 - Workflow
 - Add OCR Processing Jobs
 - Settings
 - Errors
- Indexing and Data Enrichment
 - Workflow
 - Add Indexing and Enrichment Jobs

- Update Index
- Monitor Index Status
- Errors
- Thread Analysis
 - Workflow
 - Add Thread Analysis Jobs
 - Errors

MODULE 6: IMAGING FILES

- Imaging Overview
- Configure Default Imaging Settings
- Add Automatic Imaging Jobs
- Add Manual Imaging Jobs
 - File Export Destination
 - Download/Upload Files
- Imaging - Automated
 - Imaging Jobs
 - Reversal Jobs
 - Errors
- Download Report

MODULE 7: MANAGING GROUPS & SECURITY

- Security Overview
- Groups
 - Add/Delete
 - Members
 - Set Group Default
 - Notification

- Features
 - Select Groups
 - Security – All Features
 - Security – Specific Features
 - Download Report
- Administration
 - Group
 - Admin Functions
- Objects
 - Select Groups
 - Security – Object Type
 - Security – Specific Object
 - Download Report
- Users
 - View
 - Administer
 - Download Report

MODULE 8: MANAGING DOCUMENT SECURITY

- Document Security Overview
- Levels
 - Allow/Deny
 - Set Explicitly
- Binders & Security Override
 - Add/Delete
 - Binder Security
 - Binder Override Security
- Sync Security

MODULE 9: CUSTOMIZING YOUR CASE

- Fields
 - Add/Delete
 - Quick Code
 - Security
- Case Defaults
- Issues
 - Add/Delete
 - Security
 - Download Report
- Annotations
 - - Add/Delete Redaction
 - Add/Delete Highlight
 - Security
- Note Categories
 - Add/Delete
 - Security
- Document Types
 - Add/Delete
 - Document Type Icon
 - Security
- Group Workspace
- Templates
 - Conditional Coding Templates
 - Column Templates
 - Report Tempaltes

MODULE 10: CREATING & MANAGING ANALYSIS TOOLS

- Cubes
 - Cubes Overview
 - Add/Delete
 - Clone
 - Build/Schedule
 - Download Report
 - Status
- Mines
 - Add/Delete
 - Rebuild
 - Security
- People & Organizations
 - Browse
 - Update Documents
 - Download Report
- Search Term Families
 - Add/Delete Search Term Family
 - Add Terms
 - Search Syntax Errors
 - Run Automatically After Indexing
 - Run
 - Security
 - Run History
 - Report

MODULE 11: MANAGING DOCUMENT REVIEW

- Review Setup Workflow
- Workflows
 - Security
- Phases
 - Properties
 - Rebuild
- Teams
- Phase Priorities
 - Download Report
- Add Documents
 - Workflows/Phases
- Reports
 - All Assignments – Download Report
 - Review Dashboard – Download Report
- All Assignments
 - Open Documents/Open Remaining
 - Clear Completed
 - Revoke
 - Suspend/Resume
 - Assign User

MODULE 12: CREATING & MANAGING PRODUCTIONS

- Production Overview
- Add Production
 - Attributes
 - Production Rules
 - Redactions
 - Endorsements

- Security
- Quality Control
- History
- Add Documents to Productions
- Extract Text
 - Workflow
 - Submit Extract Text Jobs
- Production Pages
- Lock
- Print
- Unlock
 - Delete
- Download Report
- Clone
 - Name
 - Description
 - Clone Settings

MODULE 13: LOAD FILE TEMPLATES

- Load File Templates Overview
- Add Template
- Default Field Formatting
- Columns
 - Add/Delete
 - Variable Builder
 - Advanced Variable Builder
- Annotations (Discover MDB Format)
- Saved Templates
- Clone Template

MODULE 14: EXPORTING DATA

- Exports Overview
- Documents Page
 - Define Export
 - File Types
 - Footer Values
 - PDF Settings
 - Annotations
 - Include Load File
 - Export Summary
- Manage Documents Page
 - Add – General (Binder)
 - Add – Production (Locked Production)
 - Delete
 - Status
 - Errors & Warnings
 - Download Files

MODULE 15: DELETING DATA

- Deletions Overview
- Add
 - Binder
- Delete Files
 - Case
 - All Related Files from Network

For a complete listing of scheduled courses, please visit: nuix.com/training

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Nuix understands the DNA of data at enormous scale. Our software pinpoints the critical information organizations need to anticipate, detect, and act on risk, compliance, and security threats. **To learn more visit www.nuix.com.**

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