

TWO-DAY INSTRUCTOR LED CLASS



Nuix Discover[®]

CASE MANAGER

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

- Data processing and import
- 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

Students will be enrolled in the Nuix Discover Case Manager exam. Passing of the Nuix Discover Case Manager exam is a requisite for the Nuix Discover Master Certification.

MODULE 1: COURSE INTRODUCTION AND GETTING STARTED

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

MODULE 2: DATA PROCESSING

- Ingestions Overview
- Configure Settings
- Stage and Upload Data
- Ingest Data
- View Jobs
- Report
- Unprocessed Files

MODULE 3: IMPORTING DATA

- Imports Overview
- View Jobs
- Upload and Evaluate Files
- Add and Delete Import Jobs
- Flat File Overview
- Clone Import Jobs
- Errors

MODULE 4: PERFORMING DATA ENRICHMENT

- Processing Overview
- Indexing and Data Enrichment Workflow
- Thread Analysis Workflow

MODULE 5: IMAGING FILES

- Imaging Overview
- Configure Default Imaging Settings
- Add Automatic Imaging Jobs
- Add Manual Imaging Jobs
- Imaging – Automated
- Renumbering Documents

MODULE 6: MANAGING GROUPS AND SECURITY

- Security Overview
- Groups
- Features
- Administration
- Objects
- Users

MODULE 7: MANAGING DOCUMENT SECURITY

- Document Security Overview
- Level Permissions
- Binders and Security Overrides

- Sync Security

MODULE 8: CREATING FIELDS, ISSUES, AND CODING TEMPLATES

- Case Setup Overview
- Fields
- Issues
- Annotations
- Case Defaults
- Coding Templates
- Document Types

MODULE 8: WORKSPACES, SEARCH TERMS, AND REPORTS

- Group Workspace
- Column and Report Templates
- People Identity
- Search Term Families Overview
- Search Syntax Errors and Messages
- Search Term Analysis Overview

MODULE 9: MANAGING DOCUMENT REVIEW

- Review Setup Overview
- Teams
- Workflows and Phases
- Security
- Add Documents to Workflows and Phases
- Phase Priorities
- Rebuild Assignments Overview

- Create Workflow and Rebuild Assignments Using CAL Score
- Manage Assignments
- Reports

MODULE 10: CREATING AND MANAGING PRODUCTIONS

- Production Overview
- Prepare Production Population
- Create Production
- Add Documents to Production
- Quality Control Checks
- Extract Text – Natives
- Lock Production
- Print Production
- Submit OCR Processing for Redacted Images
- Production Pages
- Manage Productions

MODULE 11: LOAD FILE TEMPLATES

- Load File Templates Overview
- Add
- Modify
- Clone

MODULE 12: EXPORTING DATA

- Exports Overview
- Documents Page
- Download Exports

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

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