Collections Tasks

Getting Started

Before you begin: This procedure assumes you have Collection Admin rights and do not have a case selected.

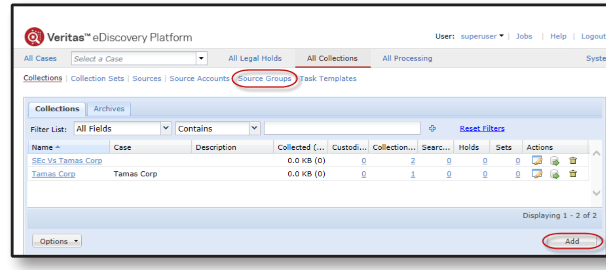
1. Create a source account and define groups.
2. Add or import custodians.
3. Create a location.
4. Add a data source.
5. Create a collection.
6. Add a task and run or schedule the task.
7. Create a collection set.
8. Add a case or add the collection set to a case.
9. Review and analyze your data.

1. Create a Source Account

1. From **All Collections > Source Accounts**, click **Add**.
2. Specify Account, User, Password, and Confirm Password.
3. Click **Save**.

Define Source Groups (Optional)

1. From **All Collections**, click **Source Groups** to organize multiple data sources.
2. Click **Add** and choose where the source group belongs.
3. Enter a name for the new group.
4. Click **OK**.



The Source Accounts screen

2. Add or Import Custodians

To perform an Active Directory discovery

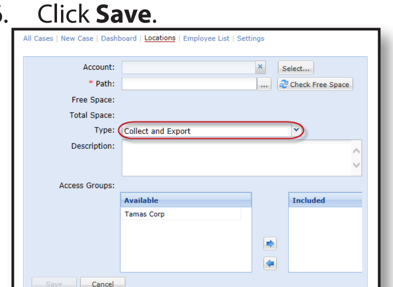
1. From **System**, click **Directories and Servers**.
2. Select the **Active Directory** tab.
3. If necessary, add the domain and click **Start Discovery**.

To import or add custodians

1. From **All Cases**, click **Employee List**.
2. **Import** or add custodians.
   - To import custodians from an existing list, click **Import** and select the appropriate option.
   - To create a new custodian manually, click **Add** and specify the required information.
3. Click **Save**.

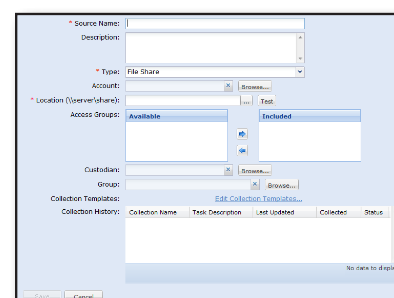
3. Create a Location

1. From **All Cases >Locations**, click **Add**.
2. Specify the account and path.
3. Click **Check Free Space** to verify data storage capacity.
4. Select the location type: **Collect and Export**, **Export Only**, or **Collect Only**.
5. Assign Access Group Security Permissions for the location.
6. Click **Save**.



4. Add a Data Source

1. From **All Collections > Sources**, click **Add**.
2. Specify the Source Name, Type, and Location.
3. Assign the Access Group permissions for the source.
4. Click **Save**.



Collection Tasks continued....

5. Create a Collection

1. From **All Collections > Collections**, click **Add**.
2. Enter a name, then **Browse** to select the default location.
3. Click **Save**.

6. Add a Task & Run

1. From **All Collections > Collections**, select a collection.
2. From **Collection Tasks**, click **Add**.
3. View/edit your sources and click **Select**. Specify task information.

Note: You can specify which directories you want to include, or exclude, as well as limit data collection to specific keywords. Refer to the Identification and Collection Guide.

4. Click **Save and Start** to begin collecting data.

7. Create a Collection Set

1. From **All Collections > Collections**, select the collection.
2. Click **Sets**, and click **Add**.
3. View your data and select filter options:

- From the Tasks / Custodians box:

  A. Include all or none (no tasks)

  B. Include all or none (no custodians)

- From the File Type / Data Options box:

  A. Select all dates, or specify date on or after/before, or time between.

  B. Select document types to include. (Clear the boxes to exclude types).

4. Click **Preview** to see a preliminary view of the data based on your selections.
5. Click **Create**.
6. Enter a name and description for the collection set.
7. Select the **Metadata Only** or **Content and Metadata** option.
8. Select the location.
9. Assign the Access Group permissions.
10. Click **Create...**

8. Add a Case or Add Collection Set to a Case

To add a new case

- From **All Cases**, click **Add** and specify source information.

To add a collection set to an existing case

1. From **All Cases**, select the case.
2. Go to **Processing > Sources & Pre-Processing**.
3. From the **Manage Sources** tab, select **Add Collection Set** from the bottom left drop-down menu, and then click **Go**.
4. Select or find a collection set and click **Select**.
5. Click **Save**.

9. Review and Analyze Collected Data

Note: Your case data must be processed/indexed before analysis. The "Data Analytics" option becomes available only after your data has completed Post-Processing.

1. With the case selected, click **Case Home**.
2. Click **Data Analytics**.
3. A dashboard of your data appears.
4. Sort and analyze the data collected as desired.

For more information, refer to the *Identification and Collections Guide.*

