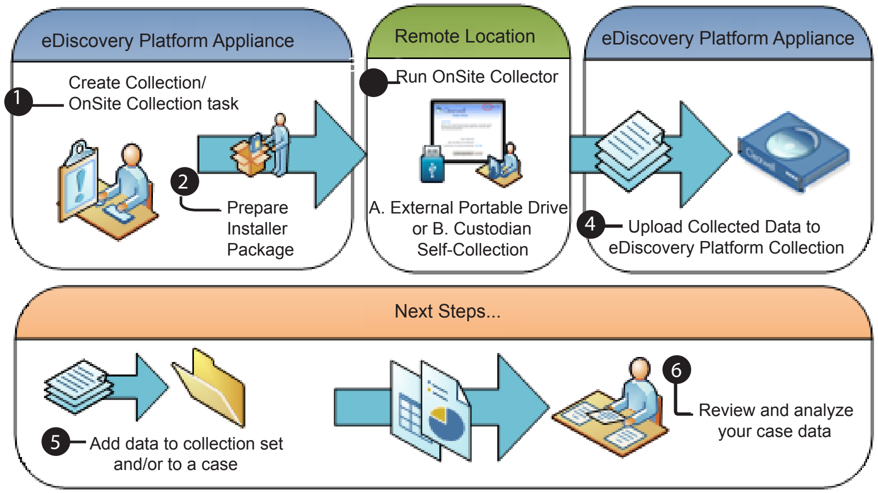
OnSite Collections

Workflow Overview



1. Add an OnSite Collections Task

1. From **All Collections > Collections,** select an existing collection.
2. From **Collection Tasks**, click **Add** to add a PC task.
3. Select Any OnSite PC or a PC source type, then select the data source from the source list. Click **Select**.
4. Choose a collection method from the Collection Method menu.
5. Select filters, choose collection encryption and NIST filtering options, and indicate an OnSite or network destination.

   Note: You can specify which directories to include or exclude from uploading to the collection. Symantec eDiscovery Platform also supports collection from locked files (through OnSite Collection only).
6. Click **Save and Start**.
   eDiscovery Platform creates an installer package for the OnSite collection within a ZIP file, ready for download/install. Continue to step 2 (next section).

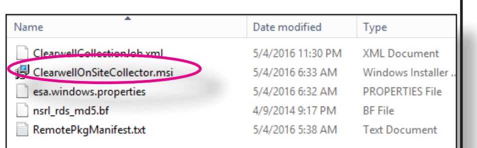
2. Prepare And Install OnSite Collector

1. From **Collection Tasks**, click to download the file to a local directory.
2. Unzip the file and run the installer (.msi) to install the OnSite Collector either onto:

   A. an external portable drive

   OR

   B. the custodian's computer for self-collection to a network destination.



Note: eDiscovery Platform supports collection from both PC and Mac (OS X) computers.

3. Run OnSite Collector (Choose A or B):

A. External Portable Drive Collection

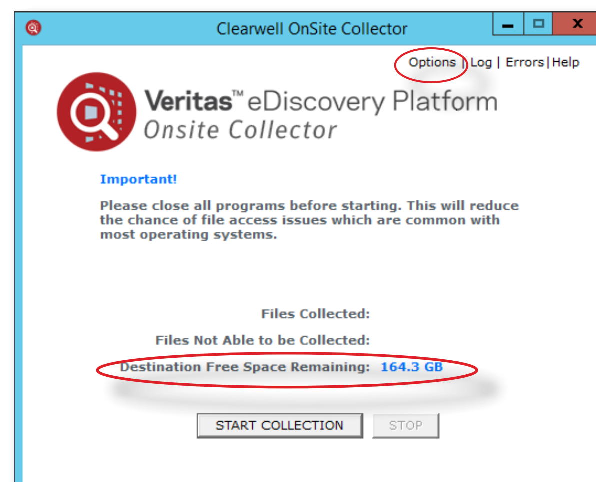
1. On the external portable drive, click the "Launch OnSite Collector" icon.
2. Click **Start Collection**.
3. After collection, repeat these steps for each additional computer where data is to be collected.

B. Custodian Self-Collection

1. On the custodian's computer, click the "Launch OnSite Collector" icon.
2. (Optional) From the OnSite Collector window, click **Options** to check the network destination (collect to portable drive) and other information specific to Collection Task Run ID, Collection Name, Task Description, and Source.

   Note: If the **Destination Free Space Remaining** field displays 'Invalid path', then click **Options** to manually select the Network destination, and then click **OK**.
3. Click **Start Collection**.
4. After collection is complete, the custodian's data is saved to the designated network destination.

   Note: Check drive space to ensure there is enough storage capacity for all collected data.
5. (Optional) After the collection is complete, click **Log** to see the logs specific to collection. To see if there are any errors in collection, click **Errors**.



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OnSite Collections Continued...

4. Upload Collected Data

Before you begin: Verify that your Windows authentication information is stored. Go to the **System** > **Settings** > **General** tab to verify your credentials are saved.

1. From within the application, open a collection where the data is to be uploaded.
2. Upload the collected data:

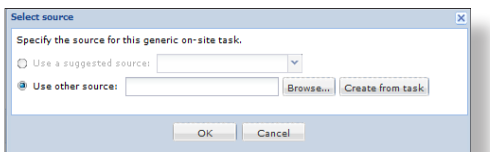
   A. With your collection selected, go to the **Collection Tasks** screen.

   B. Click **Upload On-Site Collections...**

   C. Browse to select either the portable drive, or the network destination where collected data was saved.

   D. Click **Find** to discover the OnSite Collection task.

   E. Click to select a specific source in your Data Map. You can only upload one task at a time.



   F. If the source is not in your Data Map, choose **Use other source**, select one of the two options, and then click **OK**:

   - **Create from Task** automatically adds the task and populates the field
   - **Browse** enables you to select another source

   G. From the *Upload to Collection [Collection Name]* window, click **Browse** to select the location where you want to upload your collected data. (This is typically the same destination where all the other data for this collection is stored.)

3. Click **Upload**.

Note: Depending on volume, your collected data may take a few minutes to complete uploading to eDiscovery Platform. Check the collection task Status periodically to ensure your OnSite Collection task has uploaded successfully.Next Steps...

Next Steps...

5. Creating Cases, Collection Sets, and Adding Collection Sets to Cases

To add a new case

From **All Cases**, click **Add** and specify case information.

To create a collection set

1. From **All Collections** > **Collections**, select the collection.
2. Click **Sets,** then click **Add**.

To add a collection set to a case for processing

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

6. 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.

7. With the case selected, click **Case Home**.
8. Click **Data Analytics**.
   A dashboard of your data appears.
9. Sort and analyze the data collected as desired.

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

