



Connected Apps: Discovery

Training Course

Course Overview

This hands-on course provides a comprehensive introduction to the Discovery App. Attendees will learn the benefits of the Discovery App, and how to leverage it to successfully manage and respond to e-discovery requests using the Connected Archive environment.

Duration and Pricing

This is a 2-day course for up to 6 attendees. The cost of the course (inclusive of up to 6 attendees) is \$7,200 USD.

Delivery

The training course is delivered virtually using Webex Training Center by a dedicated remote instructor.

Pre-Requisites

To get the most out of the course, attendees should have general familiarity with Microsoft Windows and Windows applications as well as a good understanding of e-discovery requirements.

For more information, or to register for this course, contact us at learningservices@smarsh.com.

Course Contents

- > Connected Archive Overview and Concepts
- > Connected Archive Terminology
- > Review Case Management Interface
- > Overview of Case Management Workflow
- > Creating Roles and Assigning Permissions
- > Creating Tag Groups
- > Creating a Case
- > Searching for Communications
- > Review of Search Interface via Collect Menu
- > Creating and Executing Searches using Content Analysis Criteria
- > Executing Searches using Context Analysis Restrictors
- > Where to Search options
- > Participant Identities
- > Directionality
- > Saving and Re-Using Searches
- > Collecting Items
- > Handling Holds
- > Unsearchable or Encrypted Content
- > Exporting Content
- > Reviewing Export Jobs
- > Downloading Exports once completed
- > Collecting Items
- > Reviewing Case Assigned Items
- > Reviewing Conversation Snapshots
- > Refining number of displayed items using Faceting
- > Reviewing Snapshot Generating Events
- > Updating Items
- > Scheduling Exports using Saved Search Templates
- > Creating and using Templates to clone Security Groups, Users, and User Created Tags
- > Activity Reporting