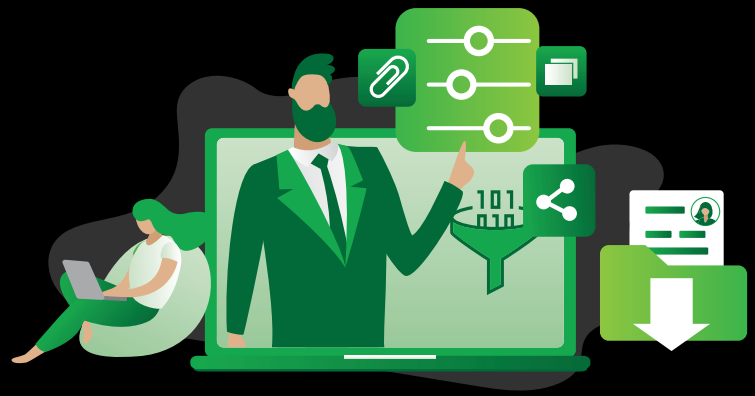


Getting to Grips with Intella Tasks



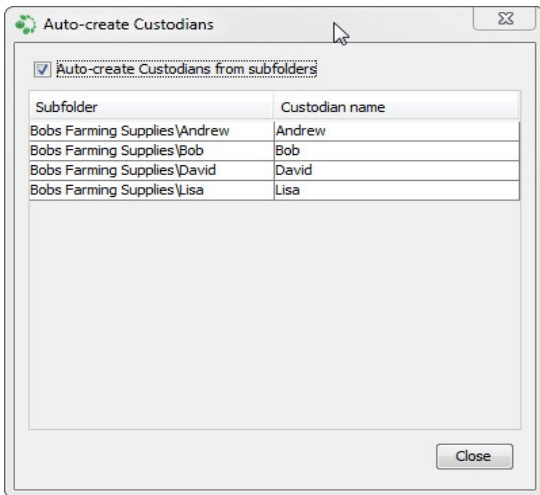
What are Tasks?

Tasks allow the user to use automation for processing and workflows in Intella and Connect. For example, separate tasks may be created to search using a keyword list, deduplicate the results and then tag the deduplicated item. There are three separate tasks, but they can all be run sequentially in this order.

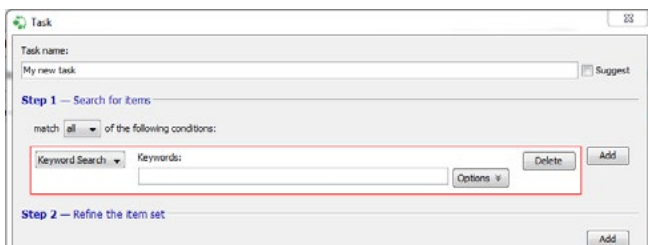
Working with Tasks

Tasks can be configured when adding a new source to a case. This is done in second to last screen of the "Add Source" wizard. There are two different types of tasks that can be configured on this screen.

- You can configure the custodians



- You can create a custom task.

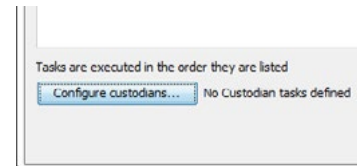


If you have received data for several custodians, and that data will be loaded into the case in one process, you can set a task to automatically assign the ingested data to the appropriate custodians.

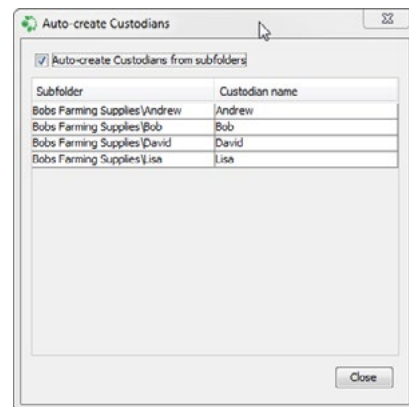
Note that the folder structure for the data to be ingested should consist of a top level folder (e.g. the company name), then separate folders which contain the data for each custodian.



Click on the "Configure Custodians" button at the bottom left of the window.

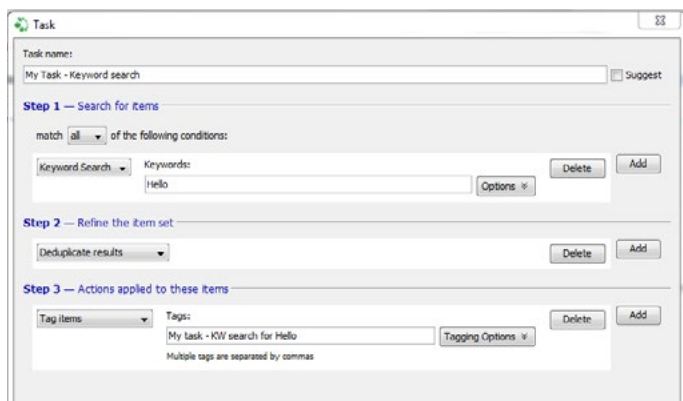


You will then get the wizard that allows you to auto create the custodians from the names of the sub folders. Once checked and closed, the custodians will be created, and their data will be assigned to them during the indexing process.



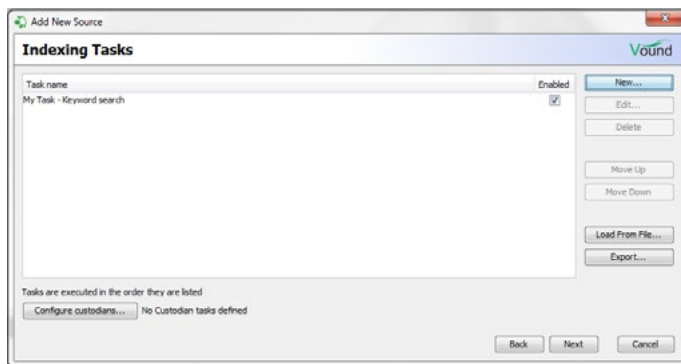
Next, we can create a custom task. Click on the “New” button to get started. After you have entered a name for the task, there are three steps.

1. Search for items: This allows you to search for, or propose the starting dataset for the task. This can include a simple search or a tag of item, etc.
2. Refine the item set: This option allows you to make some refinements such as deduplicating the items, or hiding the irrelevant items.
3. Actions applied to these items: This option allows you to choose what happens to the items. They may be tagged, exported, OCRred, etc.

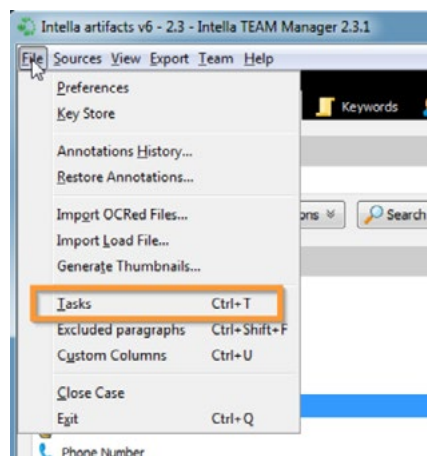


Note that for each of the three steps, you can add additional items, refinements, and actions respectively.

Once you have created the task, make sure that the task is enabled in the “Indexing Tasks” screen. Click on “Next” to continue with the “Add Source” wizard.



Although the “Tasks” wizard is shown, and can be used when a source is being used, the “Task” wizard can also be opened at any time. This allows the user to create and run custom tasks at any point during the investigation. The “Tasks” wizard can be opened by clicking on “File”, then “Tasks” in the menu.



[Click to see the full webinar video on YouTube.](#)



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