



**Process. Search. Filter. Produce. Simple.**

# Connect Case Manager

**Level: Advanced**

Wound training courses will prepare you to effectively utilize Intella when conducting a range of tasks such as processing, searching, and reviewing email and other data for investigations and eDiscovery matters. The Connect Senior Reviewer class is designed to share knowledge and best practices in the use of Intella Connect through a web browser. Throughout this course, attendees will be exposed to lectures and self-paced labs to reinforce the concepts presented throughout the learning modules..

## Learning Objectives

### Creating and Managing Cases in Connect

- Review the Connect Dashboard
  - Case list
  - Activity functions
- Describe the function of case templates
- Learn how to merge cases
- Best practices and techniques in case creation
- Apply reviewer roles to cases
- Learn how to share cases

### Preferences and Background Tasks

- Learn the global options for Intella Connect
- Viewing options for facets
- Viewing options when previewing documents
- Background tasks
  - PDF pre-generation
  - Redactions
  - Thumbnail pre-generation
  - OCR options

### Working with Intella Connect Tasks

- Learn how to use the tasks feature
- Explore how to create complex multi-action tasks
- Discuss how to export tasks to use in other cases

### Post-Processing Tasks

- Check the database for completeness
- Handle encrypted items
- Perform Optical Character Recognition (OCR)
- Email threading

### Creating Coding Layouts and Batching

- Learn the process to create and apply batch coding
- Discuss best practices in setting up batch coding
- Apply batch coding to an existing case and share between other cases

### Exporting and Productions

- Review Intella export formats
- Create export templates
- Explore export sets
- Walk through the export set wizard
- Discuss post-production quality checks

