

CUSTODIAN ADMINISTRATION

Custodian List

Custodian Record

Custodian Stats

Custodian Matter Assignment

Assigned Matters

CUSTODIAN ADMINISTRATION

Manage custodian information

1. View a list of all custodians
2. Add a new custodian or NCDS
3. Edit custodian record, change of address, job title, etc.
4. Add a custodian to a matter and select their Data Source Burden Group
5. Check status of a custodian's interviews

SYSTEM SETUP

SYSTEM CONFIGURATION

Manage system users

1. View list of users and their permissions
2. Add a new user
3. Add/edit user info including phone number
4. Assign permission level
5. Assign password requirements (length, characters, expiration)
6. Change permission levels

User Administration

User Information

Password Settings

VALUE LIST MANAGEMENT

Manage device information for Data Source records i.e. manufacturers, device types, etc.

1. View device default information
2. Add new device information

DATA SOURCE ADMINISTRATION

Computer & Hard Drive Lists

Mobile Device Lists

Removable Media & Email Lists

Collection Methods

Misc Lists

DATA SOURCE ADMINISTRATION

Manage Categories of Data Sources in System

1. View and edit Data Source categories
2. Add a new Data Source category