



## COURSE DESCRIPTION

The *Enterprise Vault Compliance Accelerator 12.x For Users* class is designed for those who use or manage Compliance Accelerator to setup departments and sampling. In addition, this class describes how to review and mark e-mails, perform research by searching or copying items to a research folder and running reports.

### Delivery Method(s)

This course is available in the following delivery methods:

- [Instructor-led training \(ILT\)](#)
- [Virtual instructor-led training \(VILT\)](#)
- [Learning Lab](#)

### Duration

- Instructor-led training - ILT: 2 days, including 6 months of lab access
- Virtual instructor-led training - VILT: 2 days, including 6 months of lab access
- Learning Lab – Self-paced lesson guide plus 6 months of lab access

### Course Objectives

- Define the features of Compliance Accelerator and how those features are used to meet a company's compliance requirements.
- Use marks to indicate the status of an item.
- Set up research folders to perform proactive investigation.
- Search, review and export items that have been sampled or found in a search.
- Run reports.
- Add monitored employees to Compliance Accelerator.
- Set sampling percentages.
- Create an application search.  
Create and manage a department.

### Who Should Attend

This course is individuals who use Compliance Accelerator to perform compliance.

### Prerequisites

Students should have a working knowledge of a Windows system such as Windows 7, 8 or 10.

### Hands-On

This course includes practical hands-on lab exercises to apply your new skills in a virtual NetBackup domain. At the start of class students will choose between Windows-based or Linux-based NetBackup servers to perform lab exercises.

## COURSE OUTLINE

### Compliance Accelerator Fundamentals

- Enterprise Vault Overview
- Introduction to Compliance Accelerator
- Starting and navigating Compliance Accelerator

### Labs:

- Exercise A: Accessing the Compliance Accelerator Client
- Exercise B: Navigating the Compliance Accelerator Client

### Manual Review

- Manual review overview
- Using the reviewing screen
- Bulk marking
- Understanding similar/deduplication

### Labs:

- Exercise A: Reviewing items
- Exercise B: Using the Facet Filtering
- Exercise C: Performing the Compliance Review
- Exercise D: Using the Review Print Tab
- Exercise E: Logging in as the Escalation Reviewer
- Exercise F: Performing the Escalation Review
- Exercise G: Examining the Closed Items in the Department Reviewer Client

### Research Folders and Searches

- Creating a research folder
- Copying items to a research folder
- Creating and running ad hoc searches
- Searching with hot words and phrases
- Search term and syntax
- Attachment searches

### Labs:

- Exercise A: Creating a Research Folder in the Tamas Department
- Exercise B: Copy Items into the Research Folder
- Exercise C: Using Authors and recipients Searches
- Exercise D: Using Search Terms
- Exercise E: Using wildcards in a Search
- Exercise F: Searching for an Item with an Attachment
- Exercise G: Perform the main search for the Research Folder
- Exercise H: Review the items in the research folder

### Reports and Exporting Data

- Compliance Accelerator report types
- Running a report
- Exporting reports
- Exporting data
- Best practices

### Labs:

- Exercise A: Exporting the Items to a PST
- Exercise B: Examining the Items
- Exercise C: Displaying the Bate Number in the Exported Data
- Exercise D: Exporting the Items to a HTML
- Exercise E: Examining the Items
- Exercise F: Exporting the Items to a Zip File
- Exercise G: Examining the Items in the Zip Export
- Exercise H: Running the CA Reports
- Exercise I: Exporting Report Data

## **Configuring Application Settings**

- Adding hot words and phrases
- Creating roles
- Managing monitored employees

### **Labs:**

- Exercise A: Logging in as the Administrator
- Exercise B: Adding Applications Hot Words and Phrases
- Exercise C: Adding Application Reviewing Comments
- Exercise D: Adding Employee Groups
- Exercise E: Creating Monitored Employees
- Exercise F: Modifying and Creating Roles
- Exercise G: Assigning Roles

## **Creating and Setting Up Departments**

- Overview of Item Sampling
- Creating an Application Search
- Creating and Managing a Department
- Adding Monitored Employees to a Department
- Setting Sampling Percentages

### **Labs:**

- Exercise A: Logging in as the Administrator
- Exercise B: Examining the Options Available for Sabina Rogers
- Exercise C: Create an Application Search
- Exercise D: Creating a New Department
- Exercise E: Set the Default Department Monitoring Policy
- Exercise F: Add Monitored Employees to the Sales Department
- Exercise G: Add a Sub Department to the Sales Department