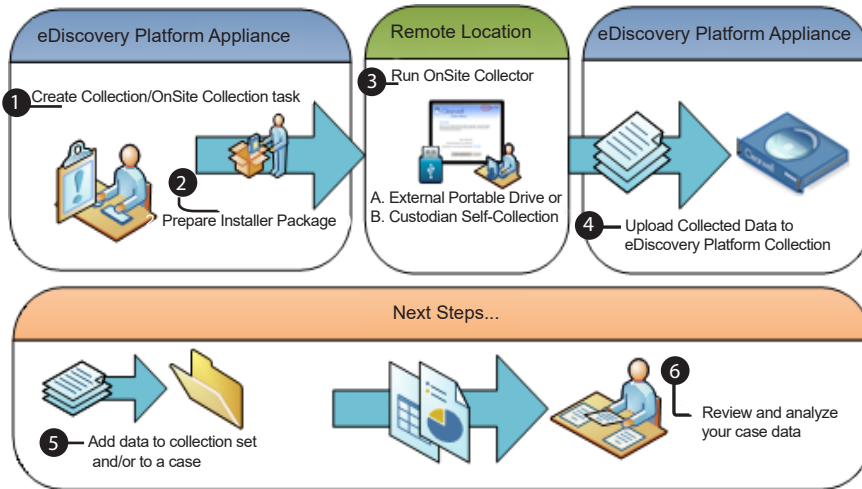


# OnSite Collections

WORKFLOW OVERVIEW



## 1. ADD AN ONSITE COLLECTIONS TASK

- From **All Collections > Collections**, select an existing collection.
- From **Collection Tasks**, click **Add** to add a PC task.
- Select Any OnSite PC or a PC source type, then select the data source from the source list. Click **Select**.
- Choose a collection method from the Collection Method menu.
- Select filters, choose collection encryption and NIST filtering options, and indicate an OnSite or network destination.
  - Note:** You can specify which directories to include or exclude from uploading to the collection. Veritas eDiscovery Platform also supports collection from locked files (through OnSite Collection only).
- Click **Save and Start**. eDiscovery Platform creates an installer package for the OnSite collection within a ZIP file, ready for download/install. Continue to step 2 (next section).

## 2. PREPARE AND INSTALL ONSITE COLLECTOR

- From **Collection Tasks**, click to download the file to a local directory.
- Unzip the file and run the installer (.msi) to install the OnSite Collector either onto:
  - an external portable drive

**OR**

- the custodian's computer for self-collection to a network destination.

Name	Date modified	Type
ClearwellCollectionJob.xml	5/4/2016 11:30 PM	XML Document
ClearwellOnSiteCollector.msi	5/4/2016 6:33 AM	Windows Installer
esa.windows.properties	5/4/2016 6:32 AM	PROPERTIES File
nsrl_rds_md5.bf	4/9/2014 9:17 PM	BF File
RemotePkgManifest.txt	5/4/2016 5:38 AM	Text Document

- Note:** eDiscovery Platform supports collection from both PC and Mac (OS X) computers.

## 3. RUN ONSITE COLLECTOR (CHOOSE A, B OR C):

### 3A. EXTERNAL PORTABLE DRIVE COLLECTION

- On the external portable drive, click the "Launch OnSite Collector" icon.
- Click **Start Collection**.
- After collection, repeat these steps for each additional computer where data is to be collected.

### 3B. CUSTODIAN SELF-COLLECTION

- On the custodian's computer, click the "Launch OnSite Collector" icon.
- (Optional) From the OnSite Collector window, click **Options** to check the network destination (collect to portable drive) and other information specific to Collection Task Run ID, Collection Name, Task Description, and Source.
  - Note:** If the **Destination Free Space Remaining** field displays 'Invalid path', then click **Options** to manually select the Network destination, and then click **OK**.
- Click **Start Collection**.
- After collection is complete, the custodian's data is saved to the designated network destination.
  - Note:** Check drive space to ensure there is enough storage capacity for all collected data.
- (Optional) After the collection is complete, click **Log** to see the logs specific to collection. To see if there are any errors in collection, click **Errors**.



## 3C. COLLECTION WITHOUT USER INTERVENTION

Run the following command:


```
D:\Clearwell\OnSiteCollector\exe\scandir\OnSiteCollector.exe
```

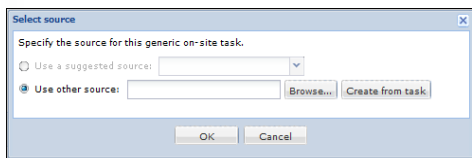
where, <D:\Clearwell\OnSiteCollector> is the folder where OnSite Collector is installed.

To launch the OnSite Collector without any user intervention (in hidden mode), run the command: `D:\Clearwell\OnSiteCollector\exe\scandir\OnSiteCollector.exe -h`

## 4. UPLOAD COLLECTED DATA

**Before you begin:** Verify that your Windows authentication information is stored. Go to the **System > Settings > General** tab to verify your credentials are saved.

1. From within the application, open a collection where the data is to be uploaded.
2. Upload the collected data:
  - A. With your collection selected, go to the **Collection Tasks** screen.
  - B. Click **Upload On-Site Collections...**
  - C. Browse to select either the portable drive, or the network destination where collected data was saved.
  - D. Click **Find** to discover the OnSite Collection task.
  - E. Click  to select a specific source in your Data Map. You can only upload one task at a time.



F. If the source is not in your Data Map, choose **Use other source**, select one of the two options, and then click **OK**:

- **Create from Task** automatically adds the task and populates the field.
- **Browse** enables you to select another source.

G. From the *Upload to Collection [Collection Name]* window, click **Browse** to select the location where you want to upload your collected data. (This is typically the same destination where all the other data for this collection is stored.)

3. Click **Upload**.

**Note:** Depending on volume, your collected data may take a few minutes to complete uploading to eDiscovery Platform. Check the collection task Status periodically to ensure your OnSite Collection task has uploaded successfully.

## NEXT STEPS...

### 5. CREATING CASES, COLLECTION SETS, AND ADDING COLLECTION SETS TO CASES

#### To add a new case

From **All Cases**, click **Add** and specify case information.

#### To create a collection set

1. From **All Collections > Collections**, select the collection.
2. Click **Sets**, then click **Add**.

#### To add a collection set to a case for processing

3. From **All Cases**, select the case.
4. From **Processing**, click **Sources & Pre-Processing**.
5. From the **Manage Sources** tab, select **Add Collection Set** from the bottom left drop-down menu.
6. Select or find a collection set and click **Select**.

### 6. REVIEW AND ANALYZE COLLECTED DATA

**Note:** Your case data must be processed/indexed before analysis. The "Data Analytics" option becomes available only after your data has completed Post-Processing.

7. With the case selected, click **Case Home**.
8. Click **Data Analytics**.  
A dashboard of your data appears.
9. Sort and analyze the data collected as desired.

For more information, refer to the *Identification and Collection Guide*.