DC Detective

AccessData

User Guide

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DC Detective User Guide

What is DC Detective?

DC Detective is a secure browser-based data preview tool that enables lawyers, paralegals, and others to preview any or all electronic documents that have been processed by the Discovery Cracker® program.

What does this mean to you? Your Discovery Cracker administrator or service provider is able to offer you greater visibility into your data and greater control over how the data you choose gets processed early in the electronic discovery process. Most importantly, the DC Detective is browser-based, allowing access from anywhere in the world using a secure internet connection. DC Detective users can do their work from any location.

This guide explains the following topics:
- Getting Set Up to Use DC Detective
- The DC Detective Workflow
- Advanced Options
- Other Activities

Getting Set Up to Use DC Detective

To use DC Detective, you need to use Microsoft ®Internet Explorer® 6.0 SP2 or higher as your browser. You need to receive the Web address, a login user name and password, and appropriate permissions from your Discovery Cracker administrator or service provider. You also need to install the appropriate software on your computer to view native files.

USER NAME AND PASSWORD

Only authorized users have access to the DC Detective Web site. You need to log in with a user name and password. Your Discovery Cracker administrator or service provider will provide your login information.

PERMISSIONS

Your Discovery Cracker administrator or service provider assigns you appropriate DC Detective permissions. The permissions control the activities you can perform as well as the Discovery Cracker projects and data you are allowed to access via the DC Detective tool.

DC Detective Activities

Your Discovery Cracker administrator or service provider gives you permission to perform one or more of the following DC Detective activities:

- Create new tags
- Edit tags
- Read notes written by other DC Detective users
- View files in their native format
- Read only

Discovery Cracker Projects and Data

Your Discovery Cracker administrator or service provider also gives you permission to view specific Discovery Cracker projects, which includes all the document "groups" and "views" in the project.

What are groups and views?

A group of documents is a collection of data that can contain a variety of file types. Imagine if all your electronic data was in paper form and you received thousands upon thousands of documents. Chances are there would be e-mails, spreadsheets, letters, etc., in varying forms of organization. The group contains a collection of the data waiting to be accessed.

DC Detective has all the tools you need to sift through your groups of data to find what matters most. Using the searching, sorting, and tagging features, the files you need will be sorted into well-organized folders/subsets called views. DC Detective can deliver the views you've created to the Discovery Cracker computers to process in the proper format needed.

VIEWING NATIVE FILES

In order to view documents in their native format, you need to ensure that the native applications are installed on the computer from which you are accessing DC Detective. For example, to view .xls document type files, Microsoft® Excel® must be installed. In addition, you also need to ensure that supplemental language support is installed in order for characters in all languages to be displayed correctly.

Native Applications

The documents you view in DC Detective have been processed by the Discovery Cracker program. To view the documents, at a minimum you typically need to ensure that the applications in the list below are installed. Of course, if you are previewing documents created in other applications, you need to install those applications also.

- Adobe® Reader
- An extraction utility, such as:
  - WinZip®

- ▪ PowerArchiver
- ▪ WinRAR
- Microsoft® Office
- IBM® Lotus Notes® Client

Supplemental Language Support

If the documents you are previewing were written in Arabic, Chinese, Hebrew, Thai, or any other language that is written with a script other than the Latin script, the language characters may not be displayed correctly. (English, Spanish, French, and German are examples of languages written with the Latin script.) For the characters from all languages to be displayed correctly, you need to ensure that supplemental language support is installed on the computer from which you are accessing DC Detective.

To install supplemental language support:
1. From the **Start** menu, select **Control Panel**, and then select **Regional and Language Options**.

2. In the **Regional and Language Options** dialog box, select the **Languages** tab.

3. In the **Supplemental language support** area, select the **Install files for complex script and right-to-left languages** (**including Thai**) check box and the **Install files for East Asian languages** check box.

4. Select **OK**.

The DC Detective Workflow

DC Detective was designed with collaboration in mind. Working with one or more users, you'll want to view the documents, agree on what action if any is necessary, and indicate what that action is. You can do this by creating custom tags that are meaningful for the particular case/matter. For example: A tag called "Render" is created so that a specific set of documents that you've chosen from the entire group will be rendered to TIFF images or PDF files. You can also include notes (comments) about the documents so that your colleagues who have been provided access can read and respond accordingly.

After tagging your designated files you will be ready to deliver them to the waiting Discovery Cracker engines for the specific action intended. Using the Discovery Cracker program, your Discovery Cracker administrator or service provider will ensure that the work is performed for the views that you have created.

The DC Detective workflow consists of the following steps:
1. Open DC Detective and select a project

2. Preview the documents

3. Create tags appropriate for your objective

4. Assign tags and notes to documents, then submit

5. Commit

6. Log out

Instructions for performing these steps are provided below.

OPEN DC DETECTIVE AND SELECT A PROJECT

Before you can access the DC Detective tool, your Discovery Cracker administrator or service provider needs to give you the following:
- User name
- Password
- DC Detective Web site address
- Permission to one or more Discovery Cracker projects

Once you have that information, you can open the DC Detective tool and select the documents you want to preview.

To open DC Detective and select a project:

1. Open DC Detective. (Open your Internet browser and enter the DC Detective Web site address.)

2. On the DC Detective login page, enter your user name and password, then select **Login**.

   On the Web page that is displayed, you see a list of the Discovery Cracker projects you have permission to access.

   Note: If you have access to only one Discovery Cracker project, you do not see a list of projects. The DC Detective Web home page is displayed.

3. Select a project from the list.

   The DC Detective Web home page is displayed.

   All the documents in the project are loaded into the DC Detective tool. The number of documents listed at one time on the **Home** tab is controlled by the number in the **Page Size** box at the bottom of the tab (you may need to scroll down to see it).

To select specific views:

In the **Select Views** box of the setup pane (on the left side of the Web page), you see all the groups in the project and the views for which you have permission. (You may need to expand the project list to see the groups and views.)

If you want to load documents from only certain groups and views, clear the check boxes of the groups and views you don't want to load, then select **Reload Views**.

The new selection of documents is loaded into the DC Detective tool.

PREVIEW THE DOCUMENTS

You must display documents to preview them.

To display a document:
On the **Home** tab, select a document by clicking anywhere on a row except the check box.

A check appears in the check box. In that instance, the check indicates that information on the Web page applies to the selected document.

The document opens in the native application. For most file types, the document is displayed in the native file viewer (the pane on the right of the Web page). E-mail files open in the specific e-mail client in a separate window.

Note:

- To view documents, the native applications must be installed on the local computer. (See page 5.)

- For the correct characters to be displayed for all languages, supplemental language support must be installed on the local computer. (See page 6.)

CREATE TAGS APPROPRIATE FOR YOUR OBJECTIVE

Tags allow you to create sets of documents to send to the Discovery Cracker program with specific processing instructions. The name of the tag indicates the instructions; therefore it needs to be meaningful to you and the Discovery Cracker operator. For example, if one of your objectives is to isolate a set of documents so that you can render them to TIFF images or PDF files, an appropriate tag could be called "Render."

To create tags:
1. Select the **Manage Tags** tab at the top of the Web page.

2. Select **Add New**.

3. Type a name for the tag in the **TagName** box.

4. Select **Yes** or **No** in the **Publishable** box.

   If you select **Yes**, this tag can be included when exporting from the Discovery Cracker program.

5. Type a description of the tag in the **Description** box.

6. Select **Add New**.

   The tag is listed in the **Select Tag** area of the operation deck section (at the bottom of the Web page).

Note: The tags you create apply only to the project you are in.

ASSIGN TAGS AND NOTES TO DOCUMENTS, THEN SUBMIT

Once you have created tags, you need to assign them to the appropriate documents. You can also add notes to documents.

To assign tags:
1. Select the check boxes of the documents you want to tag.

2. Select one or more tags in the **Select Tag** area.

3. Select **Submit**.

   The tagging information is sent to the Discovery Cracker SQL Server database.

To remove tags:
See "Keep Existing Tag" on page 10.

To add notes to documents:

1. Select the check box of the document you want to add a note to.

2. In the **Manage Notes** area, type your note in the **Add Note** box.

3. Select **Make Notes Public** to allow other DC Detective users to read the note.

4. Select **Publish Notes** to allow the option of including the note when exporting from the Discovery Cracker program.

5. Select **Submit**.

   The note information is sent to the Discovery Cracker SQL Server database.

Caution: Tags and notes are assigned to documents listed on the current page only. If you assign tags and notes but don't select **Submit** before going to the next page, the tag and note assignments are not kept.

Tips:

- You can enter only one note at a time, but apply it to multiple documents.
- If you want to add the same note to all the documents you are assigning a tag to, select the documents, select the tag, type the note in the **Add Note** box, then select **Submit**.
- You can assign different tags to different groups of documents on the same page before you select **Submit**.

COMMIT

When you have finished submitting tags and notes, you need to commit. That action creates a view in the Discovery Cracker program.

To create a view based on selected documents submitted on the current page, select **Commit**.

To create a view based on tags and notes submitted on all pages, select **Commit All**.

The Discovery Cracker program creates a view with the name "For Tag [Tag Name]," which includes the documents that have been tagged with that specific tag.

For example, if you create a Responsive tag and a Privileged tag, only documents with the Responsive tag are in the view titled "For Tag Responsive," and only documents with the Privileged tag are in the view titled "For Tag Privileged." If you tag a document with two tags, it appears in both views.

The Discovery Cracker operator then creates jobs to process the views according to your instructions.

LOG OUT

When you have finished working in the DC Detective tool, you need to log out. If you close the DC Detective tool without logging out, the records are locked (you cannot take action on them) for an unspecified period of time.

To log out, select **Log Out** at the top of the Web page.

Advanced Options

There are two advanced options that are selected by default:
- Tag Document Family
- Keep Existing Tag

TAG DOCUMENT FAMILY

With the **Tag Document Family** check box selected, when you tag a document, all the documents that belong to that parent-child relationship are tagged.

With the check box cleared, the tag is applied only to the tagged document.

KEEP EXISTING TAG

With the **Keep Existing Tag** check box selected, you cannot remove a tag from a document.

With the check box cleared, you can remove tags from documents.

Note: The safest way to remove tags is to remove them from one document at a time.

To remove tags:
1. In the setup pane, in the **Advanced Options** box, clear the **Keep Existing Tag** check box.
2. Select the document from which you want to remove one or more tags.
   a. Click anywhere on the document row except the check box to display its assigned tags in the operation deck.
   b. Select the document's check box.
3. In the operation deck, clear the check box of the tag or tags you want to remove from the document.
4. Select **Submit**.
5. Select **Commit** or **Commit All**.

Note: Keep in mind that when you remove a tag from a document, the tag will be removed from all the documents that belong to that parent-child relationship if the **Tag Document Family** check box is selected.

Other Activities

You can perform other activities in the DC Detective tool that can help you preview documents and find the information you need. Those activities are:
- Customizing the DC Detective Web Page
- Searching Documents
- Sorting Documents

Instructions for performing these activities are provided below.

CUSTOMIZING THE DC DETECTIVE WEB PAGE

You can customize the DC Detective Web page. You have the following options:
- Change the page size (the number of documents listed at one time on the **Home** tab)
- Change the layout of the Web page
- Add or remove fields displayed on the **Home** tab
- Filter documents on the **Home** tab by tag
- Filter documents on the **Home** tab by script

To change the page size (the number of documents listed at one time on the Home tab):
1. At the bottom of the **Home** tab, adjust the number in the **Page Size** box (you may need to scroll down to see it).
2. Select **OK**.

To change the layout of the Web page:
- Hide the setup pane (the area on the left side of the Web page): Select the yellow arrow at the left of the **Home** tab.
- Hide the operation deck (the area at the bottom of the Web page): In the **Change Layout** box of the setup pane, clear the check box for **Show Operation Deck**
- Hide the native file viewer (the area on the right side of the Web page): In the **Change Layout** box of the setup pane, clear the check box for **Show Native Viewer**.
- Hide the property window (the area below the native file viewer): In the **Change Layout** box of the setup pane, clear the check box for **Show Property Window**.

To add or remove fields displayed on the Home tab:
- Add a field: In the **Add, Remove Fields** box of the setup pane, select a field in the top box, then select **Add**.
- Remove a field: In the **Add, Remove Fields** box of the setup pane, select a field in the bottom box, then select **Remove**.

To filter documents on the Home tab by tag:

1. In the **Filter by Tags** box of the setup pane, expand the **All Tags** item.

2. Clear the check boxes of the tags you don't want to list.

3. Select **Submit**.

To filter documents on the Home tab by script:

1. In the **Filter by Scripts** box of the setup pane, expand **All Scripts**.

2. Select **Clear All**.

3. Select only the scripts you want to load.

4. Select **Submit**.

SEARCHING DOCUMENTS

You have two search options in the DC Detective tool. You can perform a quick search or an advanced search of the documents loaded from the project or view that you selected.

To perform a quick search:

1. Select the fields in which to search.

   In the **Quick Search Fields** box of the setup pane:

   - To add a field, select a field in the top box, then select **Add**.
   - To remove a field, select a field in the bottom box, then select **Remove**.

2. In the **Search** box at the top of the Web page, type the information you want to search for.

3. Select **Go**.

   The DC Detective tool searches all the fields you selected for the information you entered in the **Search** box and lists those documents that match the search criteria.

To perform an advanced search:

1. Select **Advanced** at the top of the Web page (to the right of the **Go** button).

   You see a page with a row of text boxes.

2. In the **Field** box, select a field in which to search.

3. In the **Operator** box, select a search action.

4. In the **Content** box, type the information you want to search for.

5. To add additional fields and search criteria, select **Add New**.

   A box displaying the words **AND** and **OR** is displayed after the **Content** box and another row of text boxes is displayed.

6. Select **AND** or **OR**.

7. Perform steps 2 through 6 until you have finished setting up your search criteria.

8. You can save the search criteria for a future search by typing a title in the **Save Search as** box and selecting **Go**.

9. To perform your search, select **Submit**.

   The DC Detective tool performs the search and on the **Home** tab lists those documents that match the search criteria.

To clear the search:
Select **Clear Search** at the bottom of the **Home** tab (you may need to scroll down to see it).

SORTING DOCUMENTS

You can control the order in which documents are listed on the **Home** tab by sorting them. You can sort the documents according to one or more fields.

To sort documents:
1. Select the **Sort** tab at the top of the Web page.

   You see a page with a **Field** box and an **Order** box.

2. In the **Field** box, select a field in which to search.

3. In the **Order** box, select either **ASE** (ascending) or **DESC** (descending).

4. To add additional fields, select **Add New**.

   Another **Field** box and **Order** box is displayed.

5. Perform steps 2 through 4 until you have finished setting up your sort criteria.

6. Select **Submit**.

   The documents are listed on the **Home** tab according to your sort criteria.

To clear the sort:
Select **Clear Sort** at the bottom of the **Home** tab (you may need to scroll down to see it).