

Reveal Processing

Getting Started



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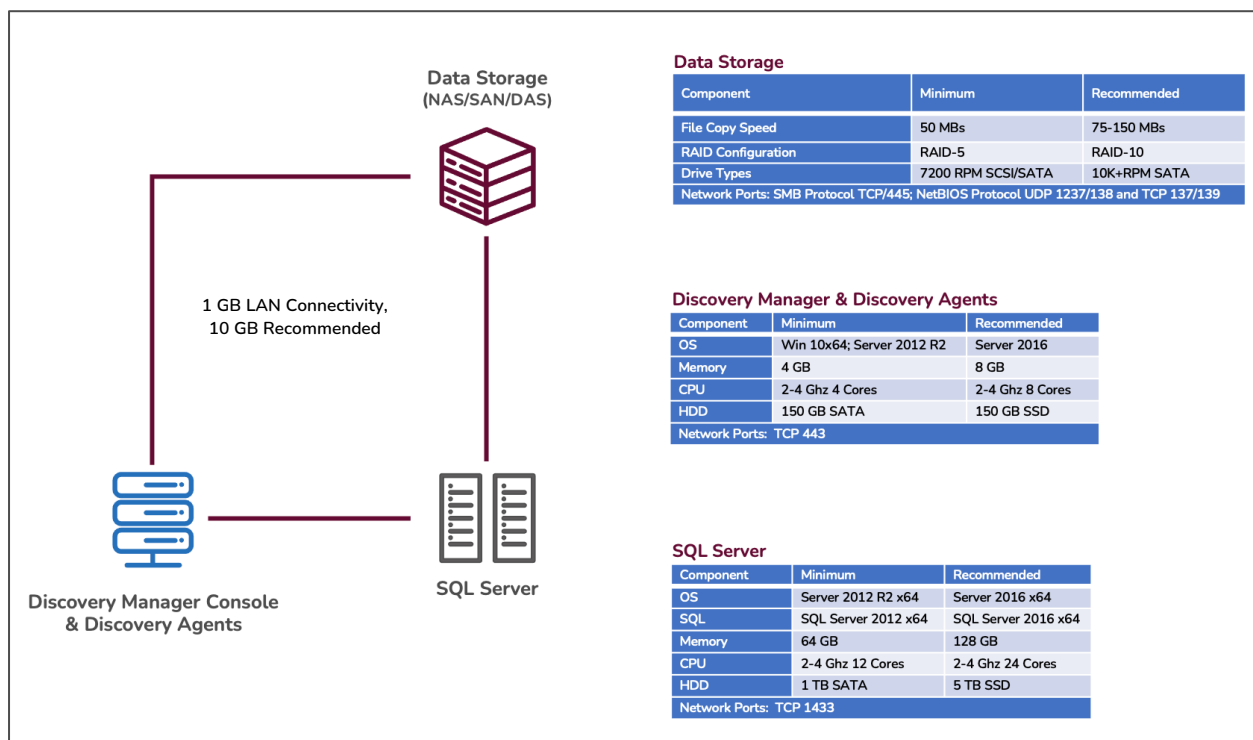
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Architecture Overview

Processing Architecture Diagram

The Reveal Processing platform diagram is provided below. The diagram depicts the major components of a standard Reveal Processing including the minimum and recommended specifications for each component.

Reveal Processing – Standard Architecture



Processing Architecture Components

The following section provides a brief description of each major processing component.

- **SQL Server** - All major components connect to SQL server. Every project created will have its own SQL database which uses the naming convention More than one instance of SQL Server may be used by Reveal Processing.
- **Data Storage** – Storage is critical to the success of Reveal Processing. Depending upon the setup there can be up to 5 storage locations. The faster the connection speed between storage locations, the better the performance.

SQL Storage is the storage location for the SQL Server. A typical project can see a data replication rate of 8% to 15% in relation to the size of the preprocessed source data.

- **Source Folder** – This is a network share location where all source data is staged for processing. Data can also be imported directly from attached and shared external hard drives.
- **Processing Folder** – when data is processed, a copy of all original non-filtered native files are copied from the Source Folder location to the project's Processing Folder. Metadata and text files are then extracted from the native file copies. This will likely be the largest folder, in terms of data size within the processing environment.
- **Discovery Manager Console** - Discovery Manager serves as the primary user interface for the processing platform. Within Discovery Manager, users can create processing projects, initiate data processing, perform exception handling, and export processed data to Reveal Review or third-party platform.
- **Discovery Agent(s)** – This is a Windows service that is responsible for completing all the distributed processing tasks which includes all processing jobs, OCR, indexing, and data export jobs. You can have multiple Discovery Agents installed in your processing environment to increase processing capacity and performance.

Create New Project

To process data, you must first create a project and client (customer) using the Project Module. The Project Module allows you to create, manage, and delete both clients and projects. Follow these steps to create a new project and client in Reveal Processing.

1. Log in to Discovery Manager.
2. Click on the Projects module from the left-hand menu.
3. Click on the **New Project** button in the **Home** menu ribbon.

Projects Module Home Ribbon



4. The New Project Creation interface will appear (see screenshot below).
5. Select an existing **Template** from the drop-down list. Templates are a collection of saved processing settings that can be applied to any new project to speed up the project creation process.
6. Select an existing **Client** from the drop-down list or click on **Create Client** to create new client for this project.
7. Enter a **Client Matter** id. This is typically the Client billing number. However, you can enter any value into this field based on your standard process.
8. Enter a name for your new project in the **Project Name** field.
9. For the **Processing Folder**, you can either browse to a storage location on your network or paste in a network path. This storage location should have enough disk space to store all the project data.
10. Specify the network location where you want to store the data exports for the project. This is referred to as the **Export Base**. An Export folder will be automatically created within this location and a subfolder will be created within the Export folder for each export.
11. Reveal will automatically have a **Default Timezone** selected for the project. You can update the timezone when you create your data processing jobs within the Import Module (see *Create Data Processing Jobs* section).
12. **For Reveal SaaS hosted processing and review environments:** If you're using a Reveal hosted SaaS environment, you have the option of automatically transferring your processed data directly into Reveal's review platform. If this option is available, select the **Associate with Review Case** option and then select the review project you created within the Review environment that corresponds to your processing project using **Existing Case** drop-down list. You also have the option of creating a new review project by selecting **Create New Case** and entering in the information requested.

New Project Creation Interface

The screenshot shows the 'New Project Creation' window. It has a title bar with standard window controls. Below the title bar is a header area with the text 'New Project Creation'. The main content area is titled 'Project Location' and contains several fields and options:

- Template:** A dropdown menu showing '-Default Settings-'.
- Client:** A dropdown menu.
- Client Matter:** A text input field.
- Project Name:** A text input field.
- Processing Folder:** A text input field with a browse button (three dots) to its right.
- Export Base:** A text input field with a browse button (three dots) to its right.
- Default Timezone:** A dropdown menu showing '(UTC) Coordinated Universal Time'.
- Associate with Review Case:** A checkbox that is currently unchecked.
- Instance Default:** A checkbox that is checked.
- Store Natives/Text/Images In S3:** A checkbox that is checked.
- Create Client:** A button with a user icon.
- Existing Case:** A radio button.
- Create New Case:** A radio button.
- Project ID:** A text input field.
- Company:** A dropdown menu showing 'Select Company...'.
- Database Template:** A dropdown menu showing 'Select Template...'.
- Two-Factor Authentication:** A checkbox.
- Document Level Security:** A checkbox.
- Artificial Intelligence:** A checkbox.

At the bottom of the window are three buttons: 'Finish..', 'Next >', and 'Cancel'.

13. Click Finish to save your new processing project. You will be directed to the last page of the new project creation interface will provide you a summary of the project settings associated with your selected template.

14. You can also choose to select **Next** and manually set each processing setting for your project. A description of each processing setting can be found within Reveal's documentation portal here: [Reveal's Processing – Project Settings](#).

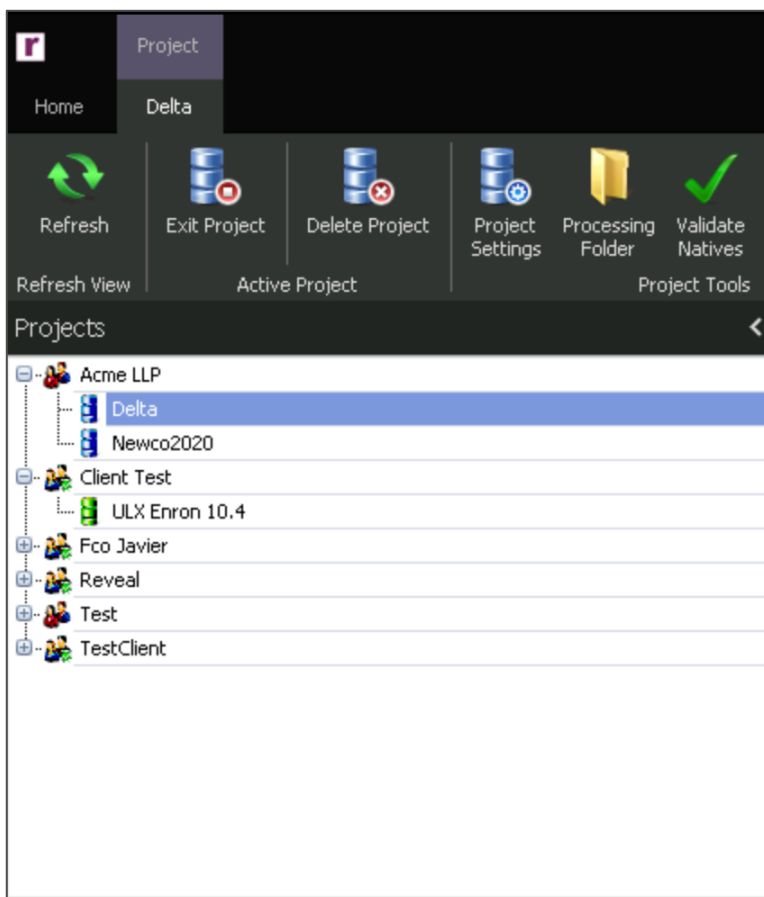
Create New Custodians

Before you can process data, you need to create the Custodians that will be associated to the data being processed. Follow the steps below to create new Custodians for your project.

1. Log in to Discovery Manager.

2. Click on the **Projects** module from the left-hand menu.
3. Click on the + symbol next to the Client (Customer) in the Projects list in the upper right-hand corner then click on your new project.

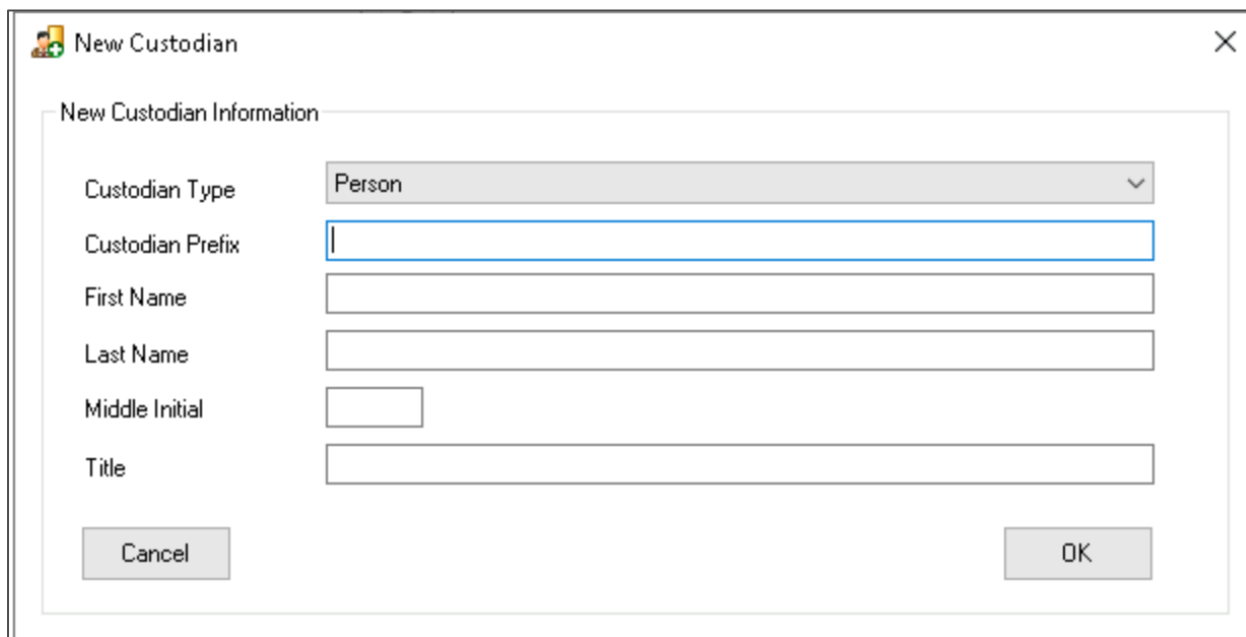
Project Menu Ribbon



4. Click on the **Custodians** module from the left-hand menu.
5. Click on **New Custodian** button within the Custodians menu ribbon at the top of the page.
6. Enter the following information to create a new Custodian (see screenshot below):
 - a. Select the appropriate **Custodian Type** from the drop-down list.
 - b. Enter a **Custodian Prefix**. This could be any naming convention you want to use. This could be a numeric prefix such as 001 or you can use the initials of the Custodian.
 - c. Custodian's **First Name** (not required for Custodian Type = Entity)
 - d. Custodian's **Last Name** (not required for Custodian Type = Entity)
 - e. Custodian's **Middle Initial** (not required for Custodian Type = Entity)

- f. Custodian's work **Title** (not required for Custodian Type = Entity)
- g. **Entity Name** – this could be any value. (Not required for Custodian Type = Person)
- h. Click **OK** to create the new Custodian.

Create New Custodian Interface



New Custodian

New Custodian Information

Custodian Type: Person

Custodian Prefix:

First Name:

Last Name:

Middle Initial:

Title:

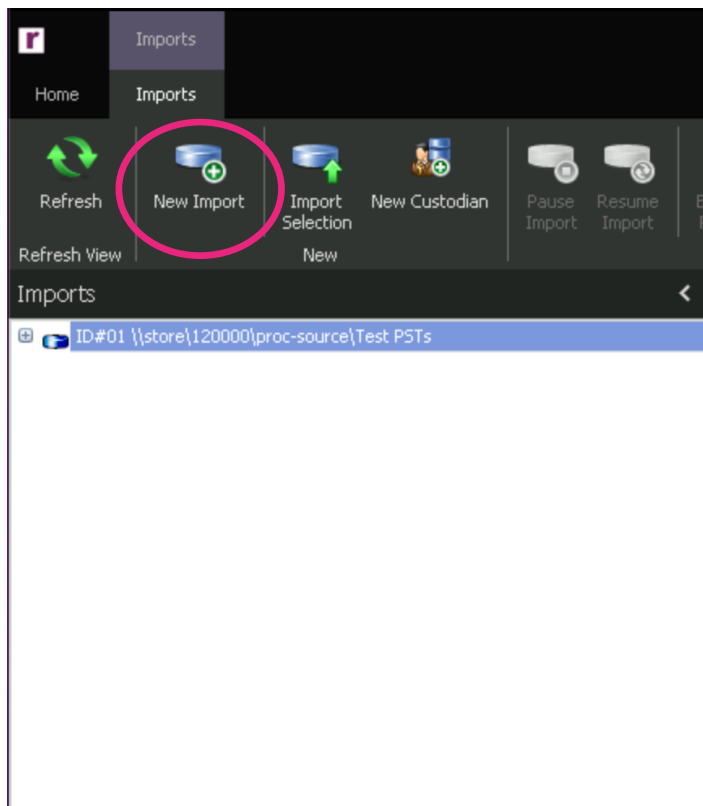
Cancel OK

Process Data

In this section you will learn the basics steps to creating a new processing job and submitting the job for processing.

6. Log in to Discovery Manager
7. Click on the **Projects** module from the left-hand menu.
8. Click on the + symbol next to the Client (Customer) in the Projects list in the upper right-hand corner then click on your new project.
9. Click on **New Import** button within the Imports menu ribbon at the top of the page.

Import Menu Ribbon



10. Select or fill in the following information to create a new processing job.

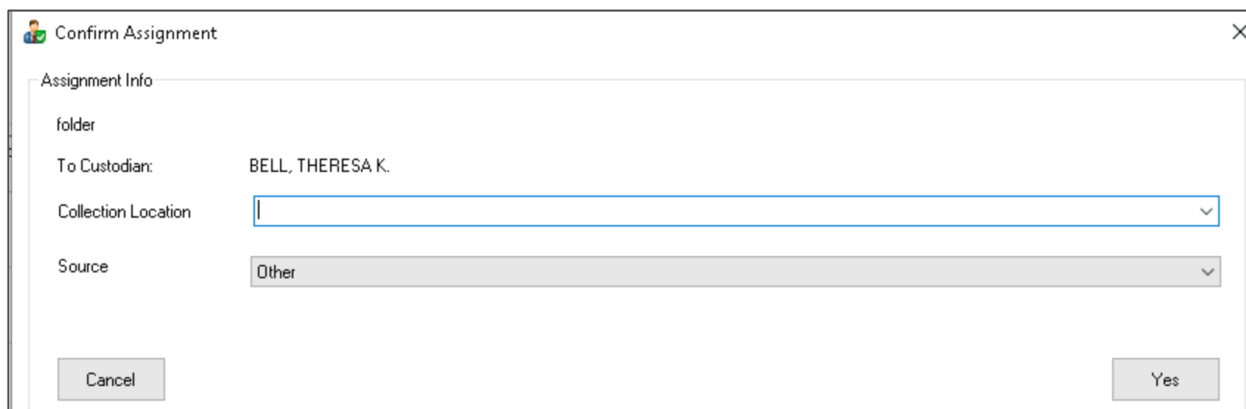
1. **Import Path** – This is the location of the native files to be processed. Use the button on the right-hand side of the Import Path to navigate to a network location where the native files are stored. Optionally, if your files are stored in AWS, you can use the button to navigate to an S3 Staging Bucket. You can also paste in a network path directly in this field.
2. **Import Timezone** – You can leave the default timezone (populated from the project settings) or you can override the selected timezone for the specific data to be processed.
3. **Custodian** – select the Custodian that should be associated with this processing job (see screenshot below) using the drop-down list provided in the grid located to the right of Import Timezone field.

Processing Job Setup Grid

Folder	Custodian	Collection Location	Source
Test_Data	<div> <div></div> <div> BELL, THERESA K. SHEDD, MARK J. TIDWELL, MATT D. </div> </div>		

4. Confirm the Custodian selection when the popup appears (see screenshot below).
5. You have the option of specifying a **Collection Location** and **Source** for the processing job / custodian combination.
6. Click **Yes** to confirm Custodian assignment.

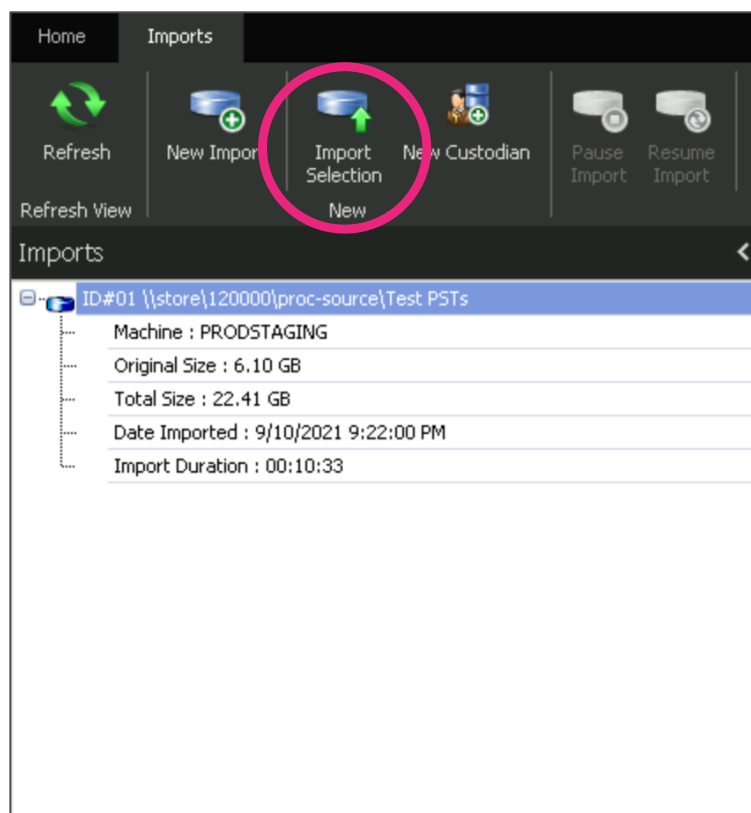
Confirm Custodian Assignment



The screenshot shows a 'Confirm Assignment' dialog box. It has a title bar with a close button (X). Inside, there's a section titled 'Assignment Info'. Below this, there are four fields: 'folder' (empty), 'To Custodian:' (filled with 'BELL, THERESA K.'), 'Collection Location' (empty dropdown), and 'Source' (filled with 'Other' dropdown). At the bottom, there are two buttons: 'Cancel' on the left and 'Yes' on the right.

11. You have the option of entering **Media Information** for tracking purposes for each processing job you create. To use this tracking feature, fill out the **Media Info** tab located below the Import Timezone field. You can also leave these fields blank.
12. You're now ready to process the data located within the selected **Import Path**. To start the processing job, click on **Import Selection** within the Import menu ribbon at the top of the page.

Import Menu Ribbon

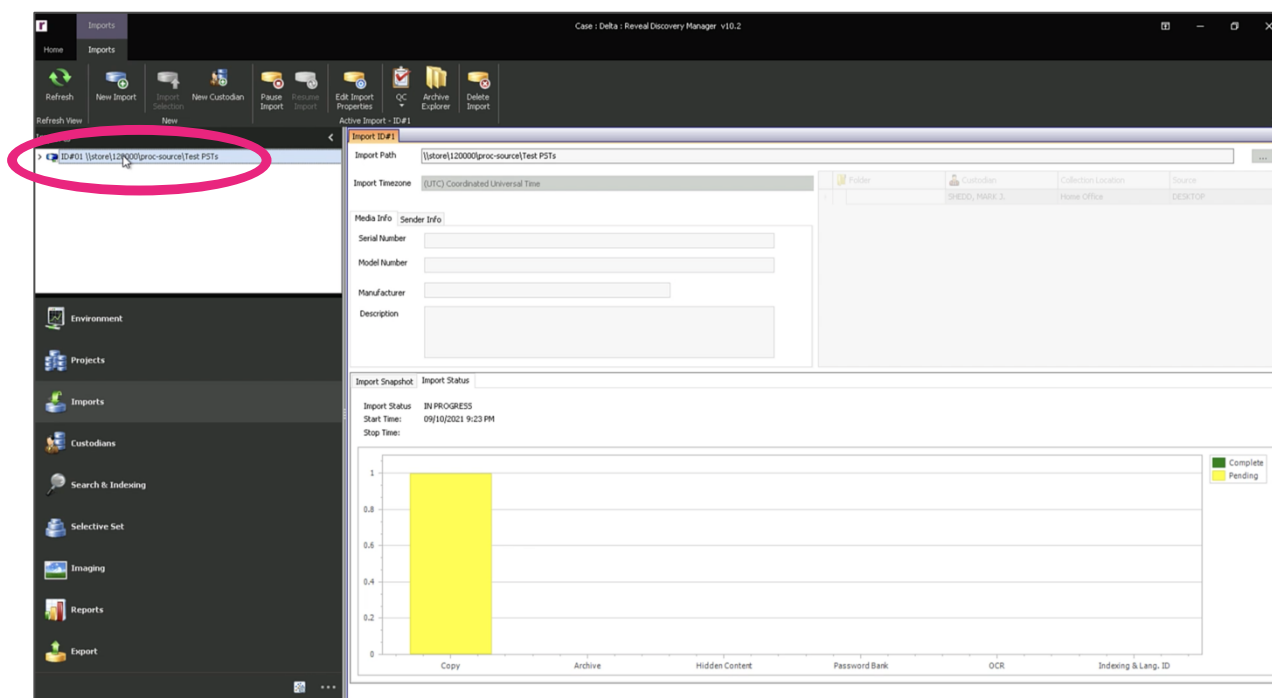


Monitor Processing Job

In this section you will learn the basics steps to monitoring a processing job.

1. Log in to Discovery Manager
2. Click on the **Projects** module from the left-hand menu.
3. Click on the + symbol next to the Client (Customer) in the Projects list in the upper right-hand corner then click on your new project.
4. Click on **Imports** from the left-hand menu.
5. Click on the Import Job from the list provided in the upper left-hand corner of the page (see screenshot below).

Import Job (Processing Job) Selection



1. You can view the status of the Processing Job by viewing the interactive chart within the **Import Status** tab located in the lower right-hand side of the Import window. The various phases of data processing are listed along with a status of Not Started (blank), Pending or In Progress (yellow), or Complete (green).
2. While the Processing Job is running, you can view a snapshot of the processed data by clicking on the **Import Snapshot** tab. This tab provides a file count and error count for various data groups including source files, expanded files, duplicates, archive files, OCR files, etc.
3. Once the Processing Job completes, the icon to the left of the job in the Import Job window will update. The icon will represent the status of selected the Import Job. See list of icon statuses below:

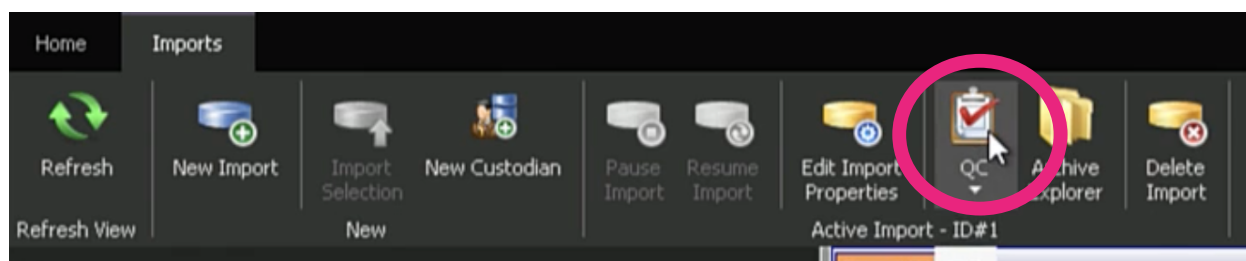
Icon	Status
	Import Job successfully processed
	Import Job In-Progress
	Import Job Has Been Paused
	Import Job Has Errors or Has Missing Files

Managing Processing Errors

In this section you will learn the basics steps to managing the processing errors.

1. Log in to Discovery Manager
2. Click on the **Projects** module from the left-hand menu.
3. Click on the + symbol next to the Client (Customer) in the Projects list in the upper right-hand corner then click on your new project.
4. Click on **Imports** from the left-hand menu.
5. Click on the Import Job from the list provided in the upper left-hand corner of the page.
6. Click on the **QC** button within the Imports menu ribbon at the top of the page and then click on **Import QC**.

Imports Menu Ribbon



See below a diagram that explains the various metrics and features within the **Import QC** page:

1. **File Exceptions & Archive Exceptions** - The **File Exceptions** (or file level processing errors) will be reported just below the Processing Exceptions section of the QC Flags window in the upper left-hand corner of the page. The **Archive Exceptions** (or Container Level) will be reported just below the File Exceptions.
2. **Attempted Exceptions** – This section provides the number of File Exceptions and Archive Exceptions where a resolution has been attempted by reprocessing the file/archive.
3. **QC Cleared** – This section reports the number of File and Archive Exceptions that have been resolved either by the system or by a user. This includes any exceptions that user “clears” as an unresolvable error such as corrupt files.

4. **QC Documents List** - This section of the page reports the number of exceptions per QC Flag or error type. You can select the checkbox next to each QC Flag Category you want to reprocess and attempt to resolve. You can also select specific QC Flag Categories to move those exceptions to the “QC Cleared” bucket.
5. **Add to Batch** – Allows you to add selected exceptions (QC Flag Categories) to reprocessing queue.
6. **Reprocess Batch** – Allows you to launch the reprocessing of selected exceptions (QC Flag Categories).
7. **Move to QC Cleared** – Allows you to move selected exceptions (QC Flag Categories) to the QC Cleared bucket.

Import QC

The screenshot displays the 'Import QC' window of the QC Workflow application. The interface includes a top toolbar with various icons and buttons, a left sidebar for 'QC Flags', and a main pane for 'QC Documents'. Numbered callouts identify the following elements:

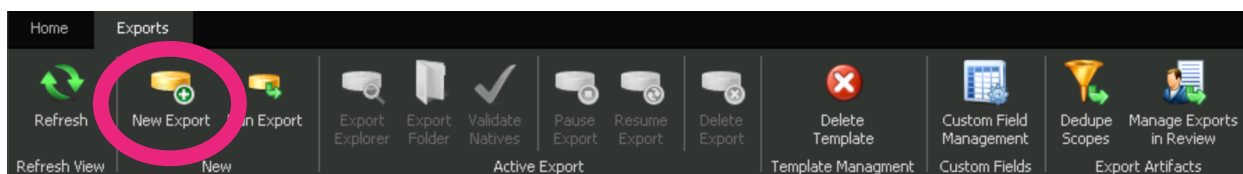
- 1**: 'Import QC' button in the top toolbar.
- 2**: 'Move to QC Cleared' button in the top toolbar.
- 3**: 'QC Flags' sidebar, showing a tree view of exception categories. The 'Processing Exceptions' category is expanded, showing 'File Exceptions' (63) and 'Archive Exceptions' (0).
- 4**: 'QC Documents' pane, showing a list of QC Flag Categories with checkboxes for selection. Categories include:
 - QC Flag Category: METADATA;TEXT;EXIF METADATA (Total = 3)
 - QC Flag Category: OCR LANG ID (Total = 4)
 - QC Flag Category: OCR LANG ID;EXIF METADATA (Total = 41)
 - QC Flag Category: OCR;EXIF METADATA (Total = 7)
 - QC Flag Category: PASSWORD PROTECTED (Total = 4)
 - QC Flag Category: TEXT (Total = 2)
 - QC Flag Category: UNRECOGNIZED (Total = 2)
- 5**: 'Add To Batch' button in the top toolbar.
- 6**: 'Reprocess Batch' button in the top toolbar.
- 7**: 'Move to QC Cleared' button in the top toolbar.

Export Processed Data

In this section you will learn the basics steps to exporting processed data to Reveal Review. There are two primary options for loading processed data into your Reveal Review case:

- **AWS Hosted Reveal Processing & Review Customers** – Recall that when you created your new processing project (see Create New Project section), you had the option of associating a Reveal Review project to your new processing project in Discovery Manager. Linking your processing project with your review case will enable the system to automatically upload your processed data into your Reveal review case.
 - **On-Prem Reveal Processing & Review Customers** – Please follow the steps below to export your data
1. Log in to Discovery Manager
 2. Click on the **Projects** module from the left-hand menu.
 3. Click on the + symbol next to the Client (Customer) in the Projects list in the upper right-hand corner then click on your project.
 4. Click on **Exports** from the left-hand menu at the bottom.
 5. Click on **New Export** from the Exports menu ribbon.

Export Menu Ribbon



6. Select the data you want to export from the tabs located at the top of the Exports window. This is called the **Export Set**. You can select multiple criteria including specific Custodians.
7. You can then specify your Export Settings using the tab located at the bottom of the Exports window.
8. You have the option of selecting a standard Export template that has all your preferred export settings already selected.
9. You can customize any of the options including what metadata fields to export, deduplication method, whether to export images/natives/text, etc.
10. Make sure you enter a name for your Export.

Export Set Window

Export

Export Set

Custodians

Data Imports

Keyword Groups

Concept Groups

Exports

Selective Set

Imaging Jobs

Tags

	<input type="checkbox"/>	ID	Display Name	Prefix	Data Size	Doc Count	Dupe Count	Cust Dupe Count
	=	REC	REC	REC	=	=	=	
	<input type="checkbox"/>		BELL, THERESA K.	TBELL		0	0	0
	<input type="checkbox"/>		SHEDD, MARK J.	MSHEDD		32	0	0

Export Scope Modifiers

☐ Exclude Previously Exported Documents from Selected Exports

	<input type="checkbox"/>	ID	Name	Type	Doc Count	Beg FileID	End FileID	Beg Bates	End Bates

Export Settings Window

Export Name: <input type="text"/>	Type: <input type="text" value="Parent/Child"/>	Template: <input type="text"/>	<input type="checkbox"/> Global
Export Settings <input type="button" value="Load File Options"/>			
General Settings			
Deduplication:	<input type="text" value="No Deduplication"/>		
Export Natives:	<input type="text" value="For All Documents"/>		
Export Images:	<input type="text" value="Do Not Export Images"/>		
Fulltext Priority:	<input type="text" value="OCR Text"/>		
<input type="checkbox"/> Add Export to Review Population <input type="checkbox"/> Document Level <input type="checkbox"/> Enable Volume and Folder Options <input type="checkbox"/> Export Text Files Separately <input checked="" type="checkbox"/> Generate Placeholders for No Extracted Text			
<input type="text" value=" <<NO TEXT EXTRACTED>>"/>			
File Numbering Options			
File Numbering:	<input type="text" value="Incremental"/>		
Prefix (20) [A-Z,a-z,0-9,-,.,]:	<input type="text"/>		
Padding Length:	<input type="text" value="8"/>		
Start Number:	<input type="text" value="1"/>		
Example:	<input type="text" value="00000001"/>		
Native Options			
PST/OST Handling:	<input type="text" value="MHT"/>		
<input checked="" type="checkbox"/> Apply to Loose/Attached Email			
NSF Handling:	<input type="text" value="MHT"/>		
Export Sort Options			
Standard Options			
Field	Field		
SOURCE	CUSTOMIDIAN		
MASTERDATE	PARENTDOCTYPE		
	IMPORTPATH		
<input type="button" value="Add Fields"/>		<input type="button" value="Remove Fields"/>	