# Ceralon Acumen
# Quick Start Guide

Acumen is an integrated e-Discovery solution that delivers import, review, production and export functionality on a scalable multi-tiered server architecture.  The following guide is intended as a complement to instructor-led training.

### Contents

## Logging in

Users will see up to four Acumen icons on their desktops:  Import, Review, Export and System Admin.  These shortcuts typically point to the following paths, depending on the Acumen installation drive:

    $\ORTSolution\Output\ortPreProcessing.exe for Import,
    $\ORTSolution\Online Review\bin\debug\Ceralon Acumen.exe for
    Review, $\ORTSolution\Export\bin\debug\Export.exe for Export, and
    $\ORTSolution\Online Review\bin\SystemAdmin.exe for System Admin.

Acumen login credentials are typically your email address and user defined password.  New passwords default to password, and the user must change this default password during his first login attempt.  Users may also change their passwords after logging into Import, Review and Export modules by choosing menu Tools > Change Password.

Logins are authorized for one or more of the following rolls:

    System Administrator - Has access to all modules and functions
    Case Administrator - For assigned clients/cases, has access to everything
    in modules Review, Import, and Export, and parts of System Admin
    Importer - For assigned clients/cases, has access to everything in Import module
    Reviewer - For assigned client/cases, has access in Review module to Review Sets
    with a status of "Assigned."

As a best practice, each user should have his own login for accessing Acumen.  This avoids application caching conflicts and preserves audit trail integrity.  However, the following user is set up by default to allow the Acumen application administrator to perform initial user setup with the system admin authorized role:  jsmith@ceralon.com, password:  password1.

## System Administration module

Before importing data (referred to as a processed batch in Acumen), a case and its associated client and users must be set up using the System Admin module.

In System Admin module, follow these steps to get started:

1.  Begin by creating a client, if one does not already exist or another is desired.  Right click on 'Client' and choose 'Add New Client'.  Complete required fields.

2.  Create one or more new users to associate with the Client, or associate an existing user with the new Client.

    *To create a user, right click on 'Users' in the left tree navigation.  Complete required fields on 'General' tab, and then associate the new user with the previously created client using the 'Add/Remove Clients…' button.*

    *To associate an existing user with the new Client, right click on the user name in the right pane of the System Admin module and choose 'Properties' and 'Client' tab.*

3.  Create a new case. Clients may have multiple cases.  To create a new case, right click on the Client in the left navigation pane of the System Admin module, choose 'Create a New Case'.  Case properties set in the new case wizard serve as defaults that may be overridden when creating a processed batch in the Import module.

    *On step Input Case Details (2 of 8), please note for a multi-server configuration that the path to the file repository and file queue must be the network path to the Acumen web services server where the share named 'ORT' resides.  The database location and log file location must be the path, beginning with the drive letter, where these files should reside on the Acumen database server.*

    *On step Add Default Case Sources (6 of 8), please add at least one source.  Examples are John's desktop, Jane's Treo, etc.  A source value will be required when running the Processed Batch Wizard in the Import module.*

4.  Authorize users to work on a given case by expanding the case in the left navigation pane of the System Admin module, right click on the role (case administrator, reviewer, importer/ exporter), and choose 'Add/ Remove Users'.

Users are typically set up by the System Administrator with email address as user name and a default password of 'password'.

As a best practice, each user should have his own login for accessing Acumen.

To get started in the System Admin module:

- create a client
- create a user
- create a new case, including adding sources
- authorize users for the new case

## Import module

Users must be authorized as either an Importer or System Admin to login to the Import module.

In the Import module, follow these steps to import data:

1. Data collected for import should reside on a local drive or an external drive attached to the Acumen application server.

2. Launch the Processed Batch Wizard, using either Tools > Processed Batch Wizard or right click on the Processed folder in the left navigation pane and choose 'Create a New Processed Batch'.

   *On step Input Batch Information (1 of 5), the Source Media field should be set to the path to the data to be imported.*

   *On step Select De-Dupe Settings (3 of 6), selecting the option 'All – Allow all duplicates to exist but link them' gives the case admin the option of toggling between showing all duplicates or just the first instance of a duplicate throughout Import and Review modules using the 'View' > 'Show All Duplicates' menu. With 'Show All Duplicates' toggled on, duplicates appear in the list pane with a red icon while the first instance of the duplicate continues to appear with a white icon.*

   *On step Select Processed Batch Merge Settings (5 of 6), please accept the default 'Merge processed batch immediately'. The alternate selection, 'Processed batch at a later date and time' is currently not working as designed.*

   The import will progress through the following steps: clean-up; inventory; explode zip, rar, pst, and nsf (3 of 5); copy files and extract text and metadata (4 of 5); dedup and index (5 of 5)

3. Optionally view and reprocess import errors.

   To view a report of import errors, right click on the processed batch in the left navigation pane and choose 'Generate Batch Report'. This spreadsheet report includes tabs for import errors, duplicates and known MD5 files.

   'Browse Batch Errors', a right-click menu option from the processed batch in the list pane gives a directory view of files that errored on import. 'Reprocess Batch Errors' reruns the import process for just those process batch files that previously errored on import.

   The Batch Summary Report, displayed at the completion of import, may be viewed any time by right-clicking the processed batch and choosing 'Batch Summary Info'

4. Create a culled batch using the Culled Batch Wizard, a right-click menu option from any Processed Batch in the Import module left navigation pane.

   *Optionally filter the culled batch using any valid dtsearch string in 'Input Search String for Culling (2 of 3)', and filter by file type using 'Select the document types to exclude from the culled batch (3 of 3)'.*

   Search hits for culled batch terms are highlighted in green in the body of responsive documents. To toggle highlighting on and off, use menu 'View' > 'Show Highlighting'.

## Review module

Case administrators must create one or more culled batches before creating Review Sets.

1. Create and assign review sets using either the 'Review Set Wizard', accessed by right-clicking a Culled batch in the left navigation pane of the review module or by using the Search utility ('Tools' > 'Search') and choosing to 'Add to Review Set' from results pane.

2. To redact a document, designate it as 'Needs Redaction' by right-clicking the document in the list pane and choosing menu option 'Designate'. (Using cntrl-click allows you to select multiple documents to designate at the same time.)

   Alternately, reviewers may redact on the fly by entering the document drill-down view (double click on any document in the list view to open the drill down window) and then choosing designation 'Needs Redaction.'

   A system administrator may define additional designation values for the case in the System Admin module using the 'Designation' tab under case properties. Adding a designation value and checking the box 'needs redaction' for this new value will allow reviewers to redact documents that are assigned this new designation.

3. Create native or tiff'ed production sets by choosing 'Tools > Create Production Sets'.

   *On step 'Configure Bates number (10 of 10)', the default starting number will be the most recently used bates number for that case. The user may override this value.*

   *Watch the progress of the production jobs that you've submitted under 'Tools > View Conversion Jobs'. In a multi-server environment, you may choose to submit queued jobs to an alternate server for processing by choosing another server name from the 'Server' field for that job.*

Use Acumen's import module to:

- import data from local or external drive
- view and reprocess errored files
- created culled batch by applying search and file type filters