HEUREKA INTELLIGENCE PLATFORM

Interrogate® Command Center User Guide

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Contents

1 User Guide Overview

The purpose of this guide is to help users understand the terms and functionality related to Heureka's Interrogate Command Center software. Most of the functionality in this guide will be available to all users, however some functions may be limited depending upon your login credentials set by the system administrator. If functions appear to be missing contact your local system administrator for help.

2 Interface Overview
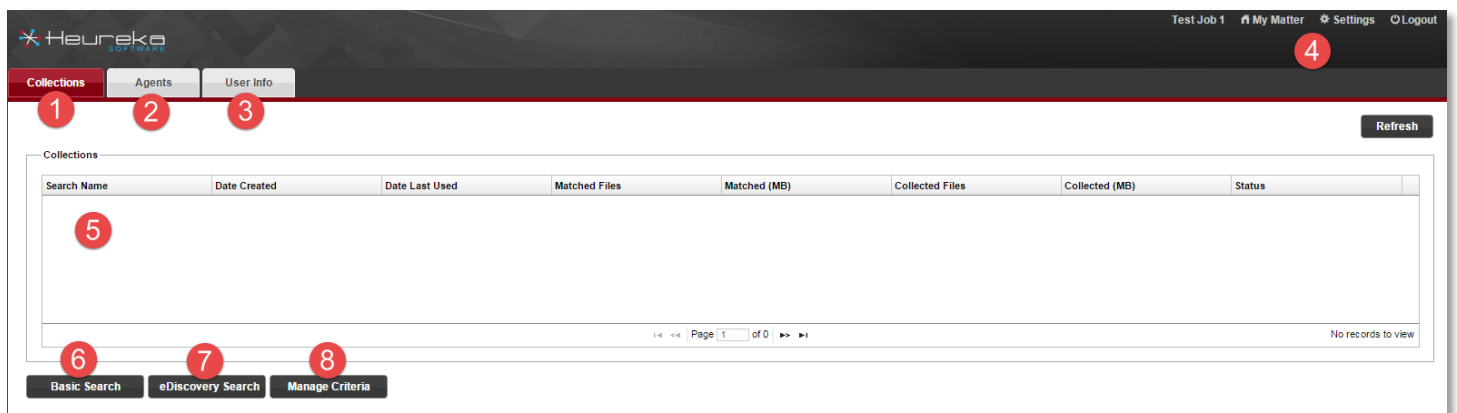
1. Collections Tab
2. Agents Tab
3. User Info Tab
4. Navigation Area (Includes "My Matter" home button)
5. Collection listing area
6. Basic Search Tab
7. eDiscovery Search Tab
8. Manage Criteria (Custodians, Keywords, Extensions, Applications)

3 Agent Management

Agents are the key component in the Heureka Intelligence platform. Agents communicate with the Command Center every minute to see if there is any work to perform. If no search command is present, the agent does nothing. If a search calls upon an agent it immediately begins to execute the search and return information to the Command Center. If an agent is inactive or offline for any reason, the search will remain in the queue until the agent becomes available.

It is important when creating searches that the appropriate agents are active and checking in to the Command Center. The Agents tab within your Matter will show you the status of all enabled agents. Before creating a collection it is highly recommended that you preview your Agents tab to verify that agents are online and checking in.

In large agent deployments it may not be possible to verify that all agents are online and checking in. In this case, you may create an "all agent" search but be mindful that data may not be returned for a considerable amount of time as agents continue to oscillate between online and offline status. Search requests for offline agents remain in the search queue until an agent comes back online. This assures that laptops or computers that are in hibernate, sleep, powered down state or without internet connection eventually execute the search as requested.

Agents can be controlled using the Agent Administrator software. Please refer to the *Agent Administrator User Guide* for instructions on how to manage your agents.

4 Login/Logout

Access to all Command Center functions is available upon a standard login screen. Your credentials consist of a user name and a password. If you have forgotten your password, select the "Forgot Password?" prompt and follow the onscreen instructions in order to reset.

To logout of the system please select the "Logout" button in the Navigation area of the interface. Logout is available at all times during Command Center operation.

Note: You will be required to re-login after a period of 15 minutes of inactivity.
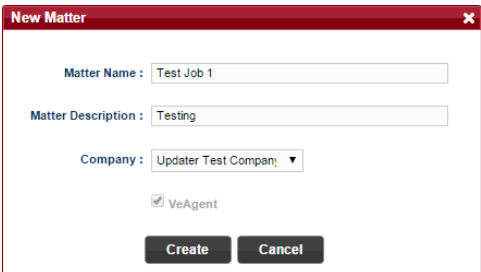
5 Settings/My Matter (Home)

The settings control button can be found in the Navigation Area (#4). Depending on your login credentials you may or may not have full controls for editing profiles or adding new users to the system. Please see the Heureka Command Center Administrator manual for additional information on creating and managing user setup.

Clicking the "My Matter" button in the Navigation area will immediately take you to the home page where you may select an existing matter or create a new matter.

6 Matters

The top-level job within the system is called a matter. A matter contains a name, description, company and collections of user defined searches. There is no limitation on the number of matters you can create within the system.

1. Select "Create New Matter" from home page
2. Enter Matter Name, Matter Description and the Company Name
3. Click "Create" or Cancel

Once created the new matter will be present in the main matter area of the Command Center interface. You may create another matter or click on the VeAgent icon to begin building your Collections.

7 Collections

Once a matter is created, you can select the red access icon for your matter in the VeAgent column of the Matter View. You will now see the Collections View where you can create and define your search collections. The Command Center interface uses a tab-based workflow. You will see three tabs at the top of your screen; Collections, Agents and User Info.

7.1 Collection Tab

The collections tab contains all information related to searches within the system. It is also the main location in which to set-up, organize and execute your searches as well as managing your search criteria groups.

7.2 Agents Tab

The agents tab is an informational pane displaying information on each agent. This tab is a high-level view of agents and is not directly tied to an individual search or collection. Of great importance is the ability to verify the last time your agent Checked-In to the command center. Agent Check-in is a critical component to your search as only the agents checking into the command center will immediately return information back to you. Agents that are offline for any reason will not return information to you until they have the ability to check in again.

The display includes environment-unique UID, Machine Name, IP Address, Install Date, Last Checked-in date/time, Crawled and Crawled Date.

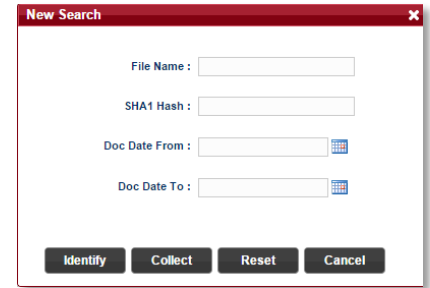### Agents

UID	Machine Name	IP Address	Install Date	Last Checked-in	Crawled	Crawled Date
3	agentsvninstall	172.16.99.3	2014-11-19 12:04:35	2014-12-05 11:20:28	Yes	2014-11-18 17:19:18
4	VEREVIEW001	172.16.77.70	2014-12-09 13:07:31	2014-12-11 15:27:22	Yes	2014-12-09 15:58:46
5	VEREVIEW001	172.16.77.70	2014-12-16 08:29:41	2014-12-16 10:18:01	Yes	2014-12-16 09:10:15
6	VEREVIEW001	172.16.77.70	2014-12-16 10:43:56	2014-12-16 13:21:58	Yes	2014-12-16 12:47:01
7	VEREVIEW001	172.16.77.70	2014-12-16 15:04:18	2014-12-16 15:28:08	No	
8	VEREVIEW001	172.16.77.70	2014-12-16 15:31:43	2014-12-18 15:55:16	Yes	2014-12-16 18:43:25

7.3 User Info

The user info tab is used to update your name, email or password for the system. Simply enter data into the available fields and click on "Update".

8 Basic Search

The basic search is located under the Collections tab. Basic search consists of four different functions including File Name, SHA1 Hash, Doc Date From and Doc Date To. Any combination of these fields can be created including simple date filters or a single file name.

8.1 File Name

File names may be entered into the File Name field. File names must include extensions for files. Multiple file names can be entered but must be separated by a comma ",".

Incorrect Search: "Filename"

Correct Search: "Filename.doc"

8.2 SHA1 Hash

SHA1 Hash values are unique system identifiers that are created when agents first crawl the installed system. A SHA1 Hash is a 40 digital alphanumeric value. Multiple values can be entered into the search but must be separated by a comma ",".

8.3 Doc Date From

The doc date from field is the start point for a creating a date filter search. You may manually enter the start date using mm/dd/yyyy format. If you would like to use the calendar function simply click on the calendar icon at the end of the entry.

8.4 Doc Date To

The doc date to field is the end point for a creating a date filter search. You may manually enter the start date using mm/dd/yyyy format. If you would like to use the calendar function simply click on the calendar icon at the end of the entry.

8.5 Identify

After entering your desired search criteria select the "identify" button in order to name and place your search into the agent queue. Once created your search will appear in the "Collections" area of the interface.

8.6 Collect

Selecting the Collect button will allow the system to physically collect the data from the desired agent computers.

9 eDiscovery Search

The eDisocvery search is located under the Collections tab. eDiscovery search consists of six different functions including Keyword Group, Custodian Group, Extension Group, Application Group, Doc Date From and Doc Date To. Any combination of these fields can be created and used.
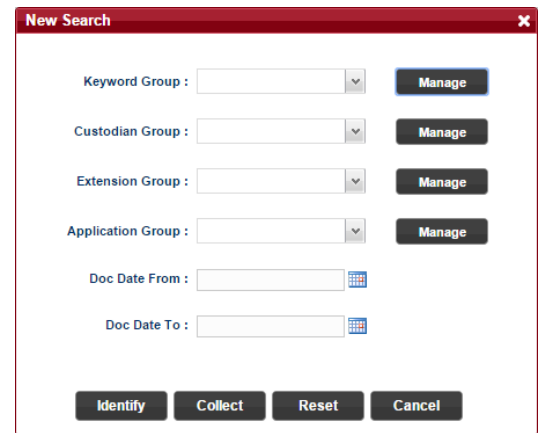
9.1 Keyword Group

A keyword group can consist of a single or multiple keywords. Previously created groups will appear in the dropdown list for reuse. Follow the steps below to create and manage the keyword group.
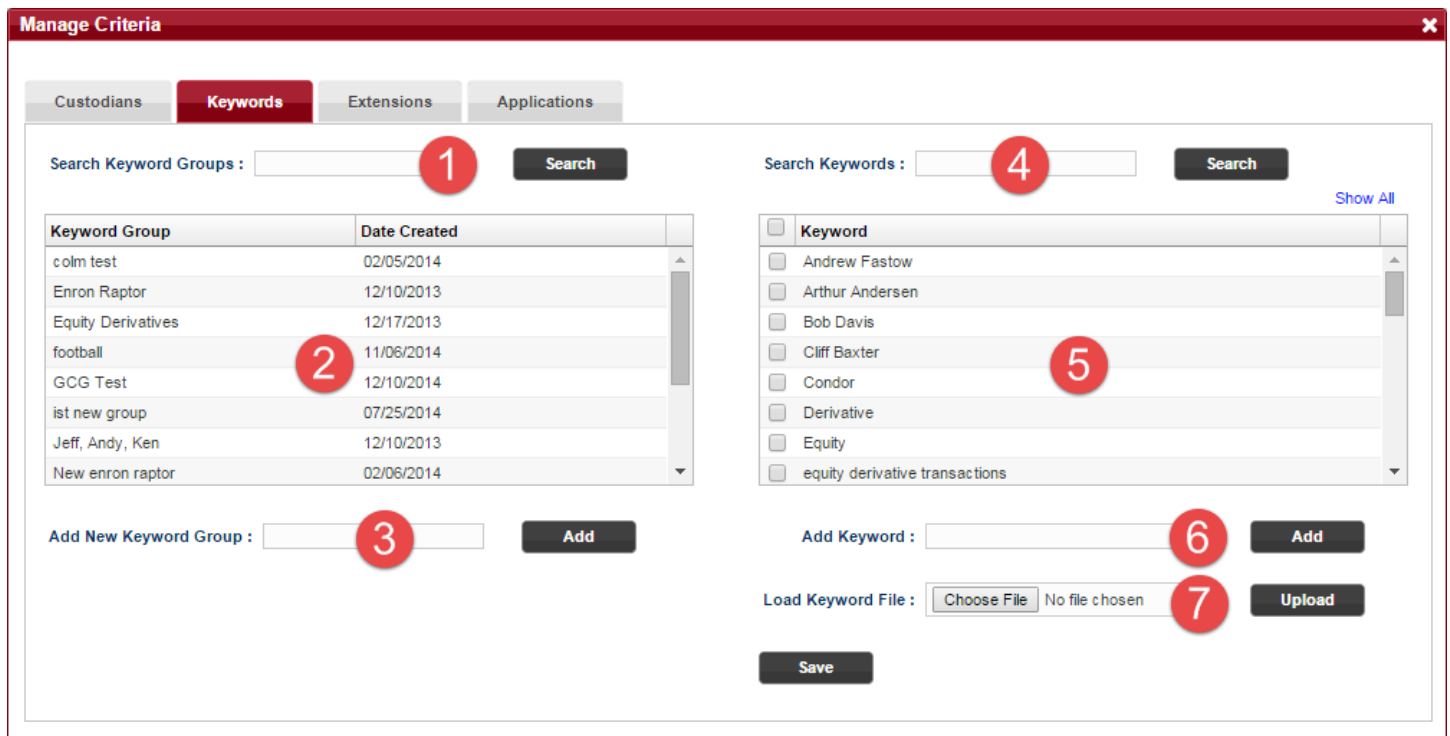
9.1.1 Managing the Keyword Group

Figure 1

1. Search Keyword Groups	Gives ability to filter the group list by name
2. Keyword Group Names	Existing keyword group names and date they were created
3. Add Group Name	Type your desired group name and click "Add"
4. Search Keywords by Name	Gives ability to filter the keywords by name
5. Existing keyword list	Existing individual keywords
6. Add Keyword Name	Type your desired keyword name and click "Add"
7. Load Keyword File	Import multiple keywords from a text file. Click "Choose File" and select your text file for import

Click on the "Manage" button next to your Keyword Group. The Manage Criteria > Keywords window will open (See Figure 1).

Searching

You can search for keyword group names or specific keywords by using the search dialog boxes located above the list views (#1 or #4).

Adding New Keywords

New keywords can be added to the keyword list you see on the right side of the Keywords tab (#6). You may add multiple keywords separated by a comma ",". Once you have added a keyword, select the "Add" button. You will now see your keyword(s) in the keyword listing (#5). Optionally, you may add keyword lists using the "Load Keyword File" button (#7). Keyword lists are text files containing multiple keywords.

Creating a Keyword Group

Once you have added keywords to your list, you can create groups containing multiple keywords. There are two methods in which to create keyword groups.

Method #1

Select your desired keywords from area #5 and click "Save" at the bottom of the screen. A "Save Keywords" dialog box will appear requesting which keyword group you would like to add keywords to. If creating a new group, select "New Keyword Group" followed by your desired Group Name. Click "Save". Your new keyword group will appear in the left list (#2).
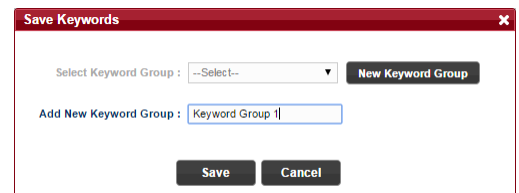
Method #2

Input your desired keyword group name into the dialog box (#3) and click "Save". Next, select your keyword group name, navigate to the keyword area (#5) and select the "Show All" button. All keywords will now be displayed. Select all desired keywords in which to group and select "Save". Select your keyword group name and click "Save". Once saved, select your keyword group and verify that your desired keywords are present in the keyword list view.

Once created, a keyword group can be used over and over again throughout the interface. Any location in which a keyword drop-down appears will allow you to select a saved Keyword group.

9.2 Custodian Group

A custodian group can consist of a single or multiple custodians. Previously created groups will appear in the dropdown list for reuse. Follow the steps below to create and manage the custodian group.

9.2.1 Managing the Custodian Group

| 1. Search Custodian Groups	Gives ability to filter the group list by name
2. Custodian Group Names	Existing custodian group names and date they were created
3. Add Group Name	Type your desired group name and click "Add"
4. Search Custodians by Name	Gives ability to filter the custodians by name
5. Existing custodian list	Existing individual custodians

Searching

You can search for custodian group names or specific custodians by using the search dialog boxes located above the list views (#1 or #4).

Creating a Custodian Group

Custodian groups can be created to define exactly which custodians are being used to execute a defined search within the system.

Method #1

Select your desired custodians from area #5 and click "Save" at the bottom of the screen. A "Save Custodians" dialog box will appear requesting which custodian group you would like to add custodians to. If creating a new group, select "New Custodian Group" followed by your desired Group Name. Click "Save". Your new custodian group will appear in the left list (#2).
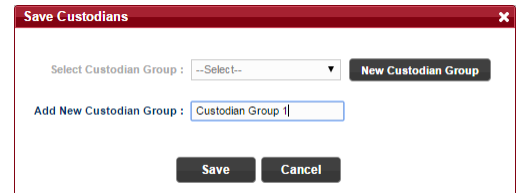
Method #2

Input your desired custodian group name into the dialog box (#3) and click "Save". Next, select your custodian group name, navigate to the custodian area (#5) and select the "Show All" button. All custodians will now be displayed. Select all desired custodians in which to group and select "Save". Select your custodian group name and click "Save". Once saved, select your custodian group and verify that your desired custodians are present in the custodian list view.

Once created, a custodian group can be used over and over again throughout the interface. Any location in which a custodian drop-down appears will allow you to select a saved Custodian group.

9.3 Extension Groups

An extension group can consists of single or multiple file extensions. Previously created groups will appear in the dropdown list for reuse. The file extension list is static and contains a very large group of possible data extensions. This list does <u>not</u> interactively update when agents check-in or systems are indexed.

9.3.1 Managing the Extension Group
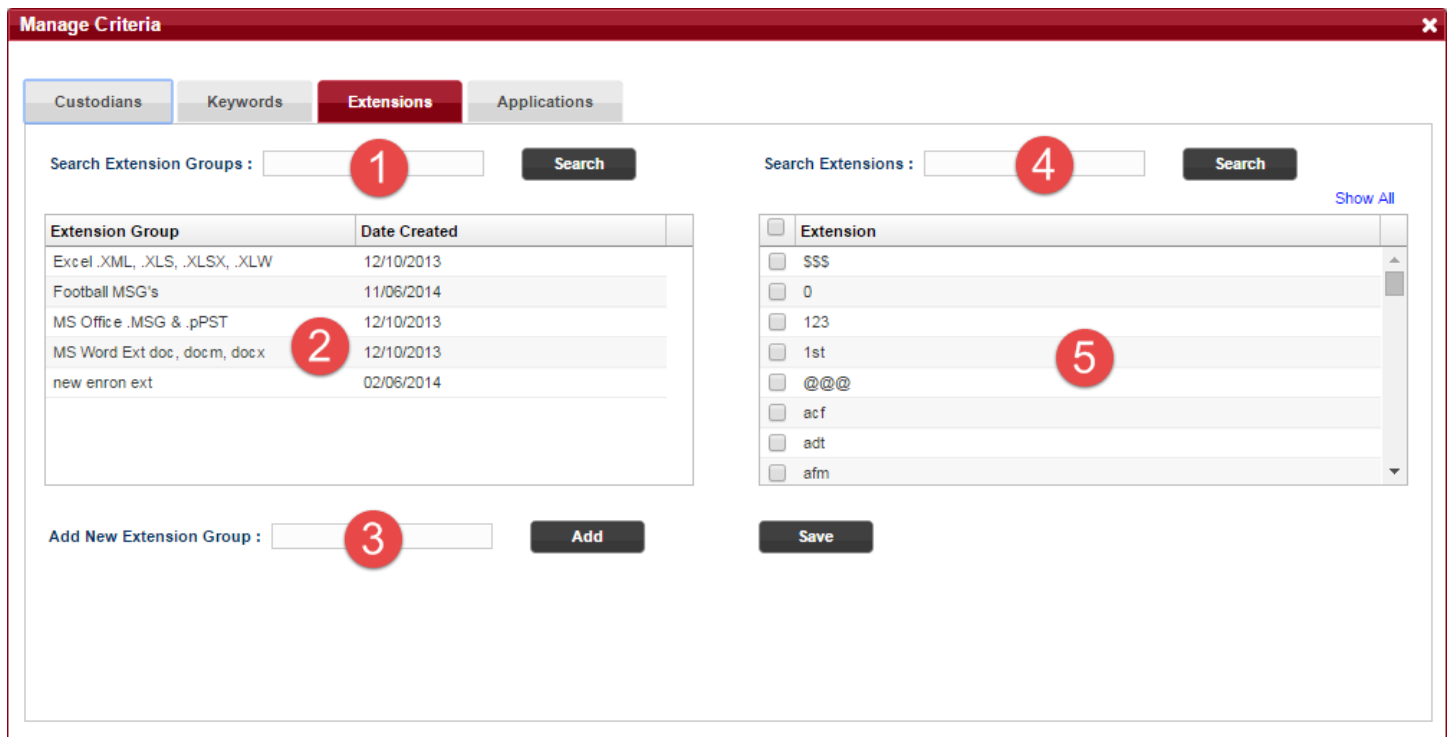
| 1. Search Extension Groups	Gives ability to filter the group list by name
2. Extension Group Names	Existing extension group names and date they were created
3. Add Group Name	Type your desired group name and click "Add"
4. Search Extensions by Name	Gives ability to filter the extensions by name
5. Existing extension list	Existing individual extensions

Searching

You can search for extension group names or for specific extensions by using the search dialog boxes located above the list views (#1 or #4).

Creating an Extension Group

Extensions groups can be created to define exactly which extensions are being used to execute a defined search within the system. Example: Word Documents (.doc) or Adobe Acrobat files (.pdf).

Method #1

Select your desired extensions from area #5 and click "Save" at the bottom of the screen. A "Save Extensions" dialog box will appear requesting which extension group you would like to add extensions to. If creating a new group, select "New Extension Group" followed by your desired Group Name. Click "Save". Your new extension group will appear in the left list (#2).
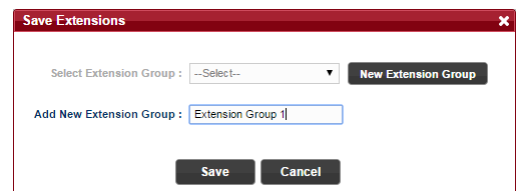
Method #2

Input your desired extension group name into the dialog box (#3) and click "Save". Next, select your extension group name, navigate to the extension area (#5) and select the "Show All" button. All extensions will now be displayed. Select all desired extensions in which to group and select "Save". Select your extension group name and click "Save". Once saved, select your extension group and verify that your desired extensions are present in the list view.

Once created, an extension group can be used over and over again throughout the interface. Any location in which a extension drop-down appears will allow you to select a saved Extension group.

9.4 Application Groups

An application group can consists of single or multiple applications. Previously created groups will appear in the dropdown list for reuse. The application list is static and contains a very large group of possible applications. This list does not interactively update when agents check-in or systems are indexed.

9.4.1 Managing the Application Group

| 1. Search Application Groups	Gives ability to filter the group list by name
2. Application Group Names	Existing application group names and date they were created
3. Add Group Name	Type your desired group name and click "Add"
4. Search Applications by Name	Gives ability to filter the applications by name
5. Existing Application list	Existing individual applications

Searching

You can search for application group names or for specific applications by using the search dialog boxes located above the list views (#1 or #4).

Creating an Application Group

Application groups can be created to define exactly which applications are being used to execute a defined search within the system. Example: Adobe PDF or Word Document.

Method #1

Select your desired applications from area #5 and click "Save" at the bottom of the screen. A "Save Applications" dialog box will appear requesting which application group you would like to add applications to. If creating a new group, select "New Application Group" followed by your desired Group Name. Click "Save". Your new application group will appear in the left list (#2).
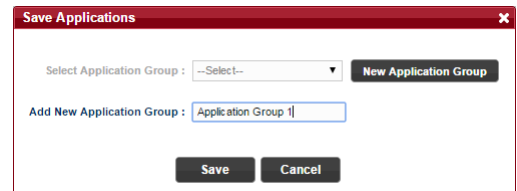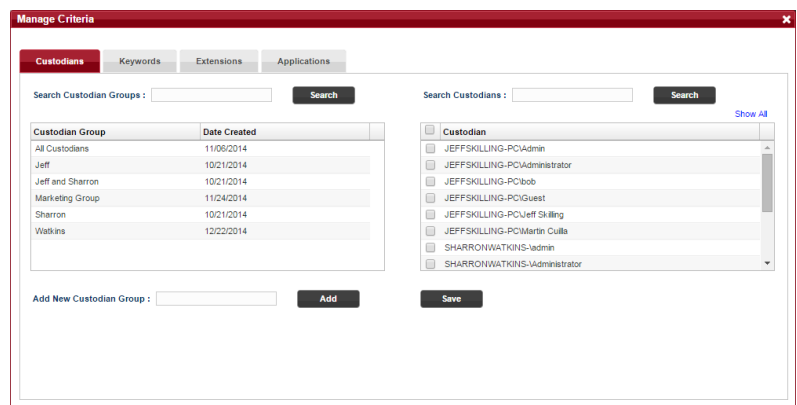
Method #2

Input your desired application group name into the dialog box (#3) and click "Save". Next, select your application group name, navigate to the application area (#5) and select the "Show All" button. All applications will now be displayed. Select all desired applications in which to group and select "Save". Select your application group name and click "Save". Once saved, select your application group and verify that your desired applications are present in the list view.

Once created, an application group can be used over and over again throughout the interface. Any location in which an application drop-down appears will allow you to select a saved Application group.

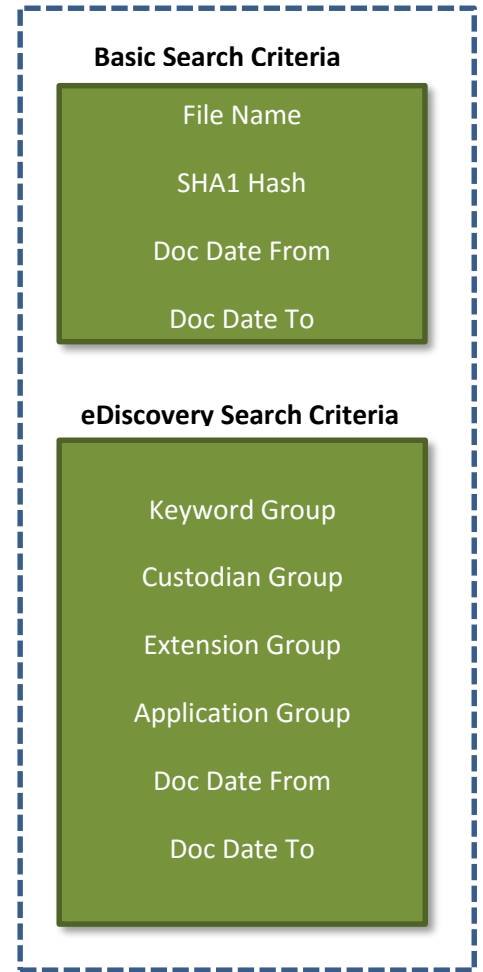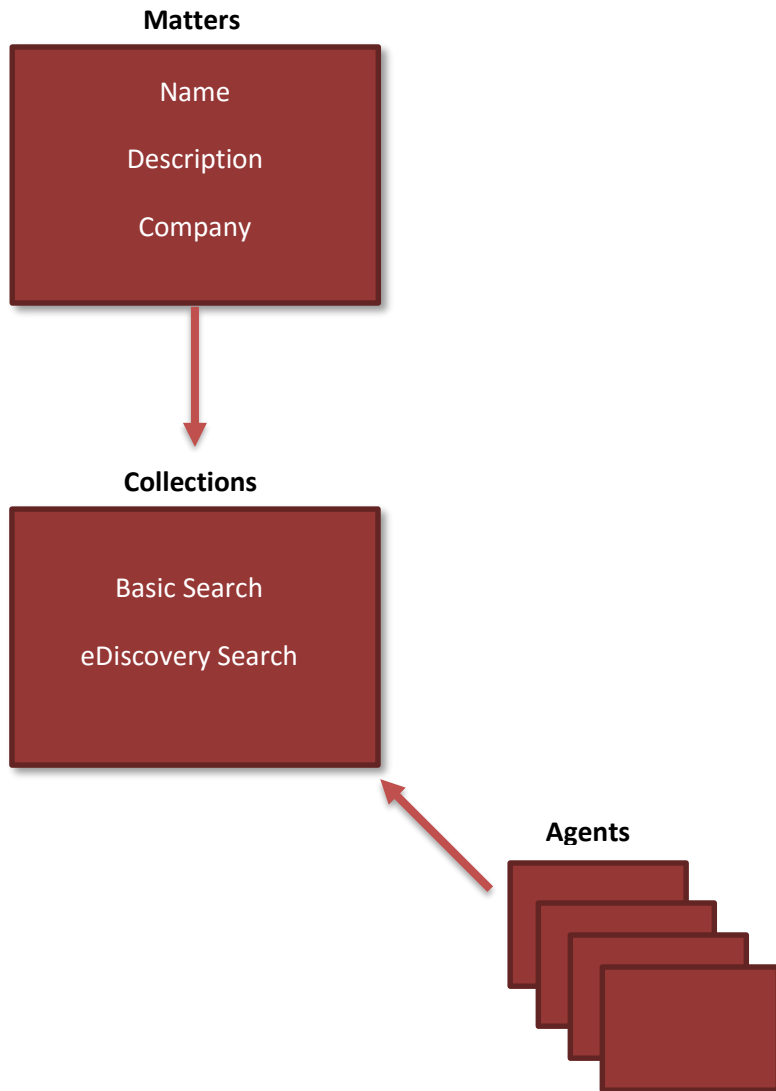# 10 Manage Criteria

The Manage Criteria button is a shortcut giving you the ability to manage all four eDiscovery search grouping functions from a single interface window. You can create new group by following the eDiscovery group instructions in section 8 of this document. Additionally, the Manage Criteria is an excellent location from which to view the settings used for groups that were created.

11 Definitions

Command Center	The main user interface for identifying and collecting information.
Matters	The top data structure within the system. Matters contain collections of information.
Collections	Consists of one or many search criteria including basic searches or eDiscovery searches.
Agent	Silent workers which reside on host computers. Agents "check in" to the command center every minute in order to receive search commands or return data according to previous instructions. Upon initial installation, agents index the host computer and build a catalog of information which can then be searched via Command Center tools.
SHA1 Hash	A unique 40 digit alpha-numeric number assigned to each file in a system
Identify	Function sending a command to the agent(s) to look for a given set of criteria
Collect	Once identified, data can (optionally) be collected from all agents and placed in a central repository on the Command Center server.
Groups	Ability to create unique groupings based on keywords, custodians, extensions and applications
Custodians	An assigned "owner" of computer information. A single device can have multiple custodians.
Keywords	A list of word(s) that are a part of a keyword group. Saved text files of multiple keywords can also be imported from a file.
Extensions	A list of file extensions such as .doc, .pdf. .xls, etc
Applications	A list of application types such as Adobe PDF, MS Powerpoint Slide, or MS Excel Spreadsheet

12 Basic Job Structure

Matters

Name

Description

Company

Collections

Basic Search

eDiscovery Search

Agents

Basic Search Criteria

File Name

SHA1 Hash

Doc Date From

Doc Date To

eDiscovery Search Criteria

Keyword Group

Custodian Group

Extension Group

Application Group

Doc Date From

Doc Date To

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