

# Veritas Alta™ eDiscovery User Guide

**VERITAS™**

# Veritas Alta eDiscovery User Guide

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Veritas Technologies LLC  
2625 Augustine Drive  
Santa Clara, CA 95054  
<http://www.veritas.com>

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# About Veritas Alta eDiscovery

This chapter includes the following topics:

- [Introducing Veritas Alta eDiscovery](#)
- [Alta eDiscovery key features](#)
- [About classification](#)
- [Alta eDiscovery term definitions](#)

## Introducing Veritas Alta eDiscovery

This guide describes Veritas Alta eDiscovery and describes how to use all of its key features.

Veritas Alta eDiscovery is a web-based service that enables your company to respond proactively to litigation requests, ensure adherence to company communication policies, and meet regulatory requirements.

Alta eDiscovery provides the tools to search your company's archived items (emails, collaboration messages, and files) to discover those that are pertinent to litigation cases or infringements of corporate policies and regulations. Alta eDiscovery provides case management features for eDiscovery work, including the ability for multiple reviewers to collaborate during the eDiscovery process. Items that are found to be of interest can be exported for external review.

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**Note:** This updated edition of the *Alta eDiscovery User Guide* incorporates information about the search feature that was previously included in the *Alta eDiscovery Search Guide*.

---

## Recent updates to Alta eDiscovery

Recent updates to Alta eDiscovery include the following:

- Integration with the Veritas Alta Classification. Alta eDiscovery's message search criteria now include options to search for the emails that are tagged with classification tags from the Veritas Alta Classification. See "[About classification](#)" on page 12.
- **Integration with Microsoft Teams, OneDrive for Business, and Enterprise Vault:** The search criteria in Alta eDiscovery now include options to search from emails, messages, and files that are archived from Microsoft Teams, OneDrive, and Enterprise Vault. See "[About Targeted Collections](#)" on page 36. and See "[Configuring Targeted Collection for Microsoft Teams](#)" on page 37.
- Filtering items in searches based on **sentiment score**: The filter criteria in searches now include option to filter items based on their sentiment score.
- **Collection Defensibility Report:** The **Targeted Collections** page displays an expansion icon for the Enterprise Vault, Microsoft Exchange, and Microsoft Teams reactive collectors that are successfully archived. You can expand the row to view details like Items Collected, Items Received, Items Archived, Items Duplicate, Items Rejected, and Items Failed.

A list of the updates that were included with previous releases of Alta eDiscovery is provided separately.

See "[About the Alta eDiscovery updates in previous releases](#)" on page 344.

For full details of all the updates in each release of the Veritas Alta Archiving service suite, see the Veritas Alta Archiving release notes. You can access the release notes from the following article on the Veritas Support website:

<http://www.veritas.com/docs/000100485>

## Alta eDiscovery key features

Alta eDiscovery includes the following features:

- **Advanced iterative search capabilities**  
Alta eDiscovery enables you to accelerate eDiscovery and investigations with powerful search capabilities to deliver fast results. Alta eDiscovery enables you to build iterative searches using multiple criteria and to refine searches until the relevant information is located. If you add any criteria that narrow the search results too significantly, you can delete the term that limited the results, without re-building the entire search.  
Once the desired criteria are established, you can save the search. If you save the search as an on-going search, any new items that meet the criteria are

automatically found, which significantly reduces review time. Phrase, Boolean, proximity, and wildcard search functionality enables relevant information to be found quickly, and allows further refinement of search results before export.

- Collaborative eDiscovery workflow

Alta eDiscovery provides a built-in collaborative workflow. Alta eDiscovery's case management capabilities enable multiple reviewers to interact and collaborate on a specific case. Once a case is created, you can provision each reviewer with distinct privileges within the case. Reviewers can review messages, view case logs and reports, create exports, manage other reviewers, and edit a case, depending on their privileges. The external reviewers can have the additional privilege - download shared export - that allows them to download the exports shared by the administrator.

A reviewer with access to a case can use the extensive search capabilities to search the archives of the custodians involved. Searches can be saved and assigned to various reviewers to distribute the workload and expedite the eDiscovery process.

A reviewer can place archived information on legal hold, apply review status tags and labels, categorize information, and add notes for other reviewers.

- Classification with the Veritas Alta Classification.

If your company has the Veritas Alta Classification service enabled, the service can apply classification tags to Veritas Alta Archiving's incoming emails, attachments, collaboration chats, and files that match the enabled policies in the Veritas Alta Classification. Alta eDiscovery users can then search for the emails, attachments, collaboration chats, and files that are tagged with these classification tags.

See "[About classification](#)" on page 12.

- Flexible export options

Designated reviewers and administrators can perform online exports of search results. The ability for you to export data yourself minimizes your IT team's workload.

You can export archived information from the archive in EML, PST, and NSF formats, with or without EDRM XML files. The archived information can then be imported into solutions like the Veritas™ eDiscovery Platform. An authorized reviewer or administrator can name and password-protect their exports.

- Reporting

Alta eDiscovery offers reporting functionality for reviewers and administrators to view audit trails for individual messages, or to view the history of an entire case.

## About classification

The Veritas Alta Classification now integrates with Veritas Alta Archiving to classify the emails, attachments, collaboration chats, and files that Veritas Alta Archiving archives. The Veritas Alta Classification's built-in policies address many of the regulatory requirements and corporate standards for which you may want to classify emails.

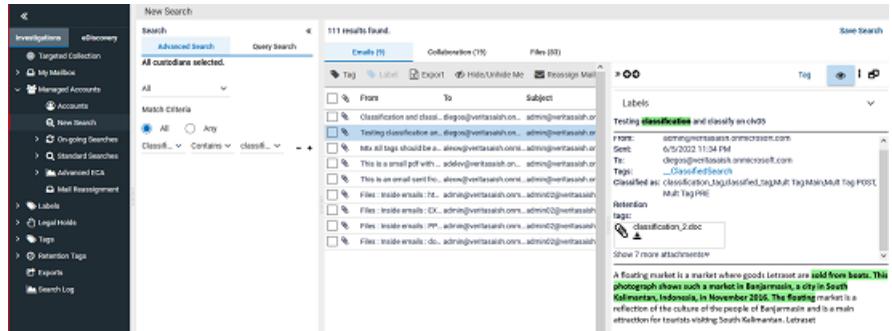
If your company has the Veritas Alta Classification service enabled, the service can apply classification tags to Veritas Alta Archiving's incoming emails, attachments, collaboration chats, and files that match the enabled policies in the Veritas Alta Classification. Alta eDiscovery users can then search for the emails, attachments, collaboration chats, and files that are tagged with the classification tags.

For example, your company can enable the classification policies that detect personally identifiable information (PII) to help meet privacy regulations like the General Data Protection Regulation (GDPR). The PII policies match content like credit card numbers, email addresses, dates of birth, passport numbers, and driver's license numbers. When the Veritas Alta Classification identifies an email that matches the criteria for the policy, a PII classification tag is assigned in a header that gets added to the email. A Alta eDiscovery reviewer can then perform a search for the emails, attachments, collaboration chats, and files that have the PII tag assigned. In this way, classification reduces review effort to meet your organization's regulatory requirements.

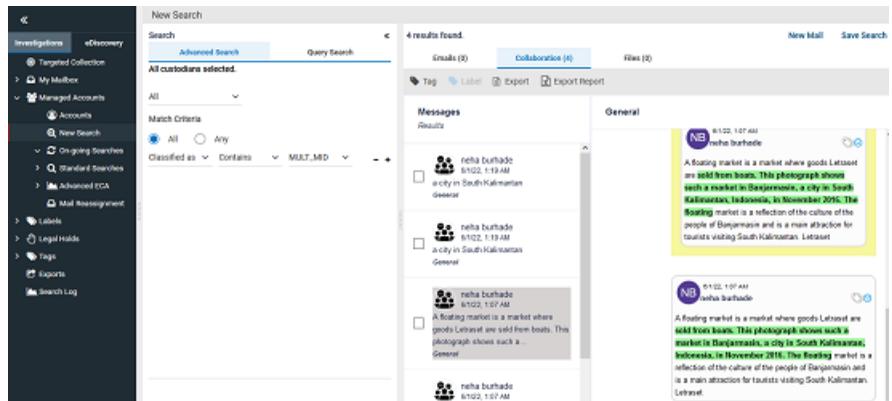
Note the following about the classification process:

- The classification tags that are associated with a policy get applied only to those matching emails, attachments, collaboration chats, and files that are ingested into Veritas Alta Archiving after the policy is enabled. Any previously archived emails, attachments, collaboration chats, and files do not get tagged.
- If your system administrator changes or disables a classification policy, the changes affect the emails, attachments, collaboration chats, and files that are subsequently ingested into Veritas Alta Archiving. The changes are not reflected in the existing archived emails, attachments, collaboration chats, and files. For example if you disable a previously enabled classification policy, any archived emails, attachments, collaboration chats, and files that were tagged as a result of matching the policy remain tagged in Veritas Alta Archiving.
- While previewing the HTML-rendered text of emails, attachments, collaboration chats, and files, the application highlights the policy text mentioned in the applied classification tags.

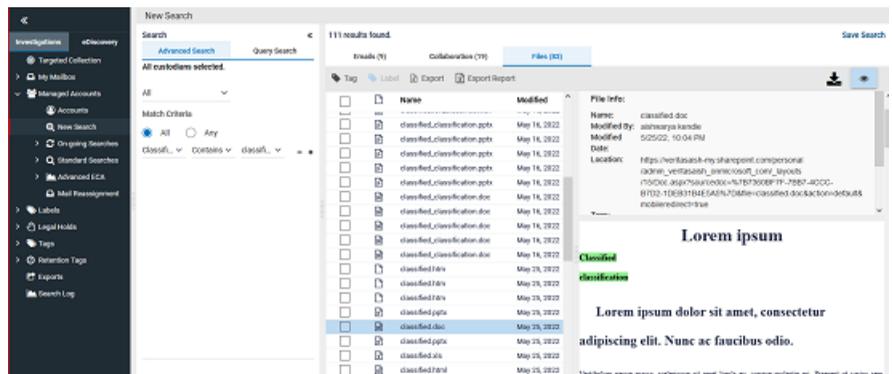
*Sample image of highlighted text in emails:*



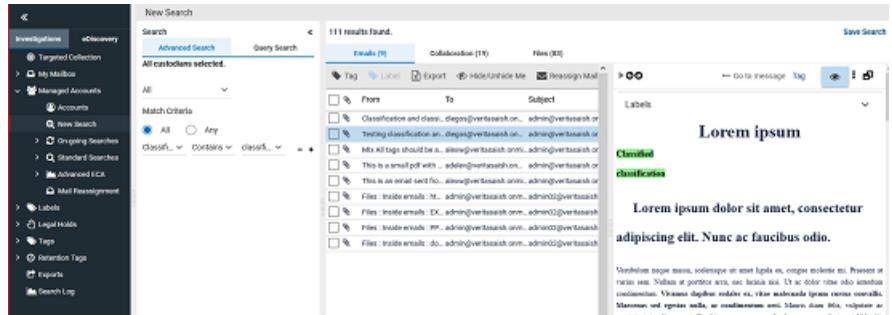
Sample image of highlighted text in collaboration message:



Sample image of highlighted text in files:



Sample image of highlighted text in attachments:



- **Important:** The application does not highlight the same text in the images and the native view of the files.

For information on how set up the classification of emails, attachments, collaboration chats, and files with the Veritas Alta Classification, see the Veritas Alta Archiving Archive Administration Help.

## Alta eDiscovery term definitions

Table 1-1 lists some specific terms that are used in Alta eDiscovery and explains their meaning in this context.

**Table 1-1** Alta eDiscovery definitions

Term	Description
Classification	If your company is enabled for the Veritas Alta Classification service, you can simplify data management decisions by categorizing data based on classification policies. The Veritas Alta Classification integrates with Veritas Alta Archiving to analyze the emails, attachments, collaboration chats, and files that Veritas Alta Archiving stores. The Veritas Alta Classification service assigns classification tags to those emails, attachments, collaboration chats, and files that match the classification policies your Veritas Alta Archiving system administrator has enabled.
Classification tag	The Veritas Alta Classification service assigns classification tags to the incoming emails, attachments, collaboration chats, and files that match the conditions of an enabled classification policy. Alta eDiscovery users can search on the classification tags as part of their eDiscovery work.

**Table 1-1** Alta eDiscovery definitions (*continued*)

Term	Description
Custodian	In the context of Alta eDiscovery, a custodian is anyone for whom your organization holds or has held an archive account. When an eDiscovery Administrator creates a case, they assign the custodians that the associated eDiscovery is to include.
eDiscovery	eDiscovery is the electronic aspect of identifying, collecting, and producing electronically stored information in response to a request for production in a law suit or investigation.
GDPR	General Data Protection Regulation. A regulation to strengthen and unify data protection for individuals within the European Union (EU). The GDPR aims primarily to give control back to citizens and residents over their personal data and to unify data protection regulation within the EU.
Investigation	In the context of Alta eDiscovery, this term means to examine and discover the factors of a potentially legal inquiry.
Label	Apply a label to an email typically to mark it as exempt from the review process. The default labels are: <b>Spam</b> , <b>Privileged</b> , and <b>Personal</b> . You can create custom labels to suit your company's requirements.
Legal Hold	A legal hold is a process that an organization uses to preserve relevant information for legal reasons.
Case	In law, a case is a subject that is in controversy or in dispute. In Alta eDiscovery an eDiscovery Administrator creates a case to act as a container in which to associate all the related emails, attachments, collaboration chats, and files for such a subject.

**Table 1-1** Alta eDiscovery definitions (*continued*)

Term	Description
Tag	<p>In Alta eDiscovery a tag is a marker that can be applied to emails, attachments, collaboration chats, and files to help organize the process of investigation or review.</p> <ul style="list-style-type: none"> <li>■ In the <b>eDiscovery</b> tab you can tag an email with a review status tag to indicate its status in the eDiscovery review process.</li> <li>■ You can apply your own custom tags to emails, collaboration messages, and files as you want, for example to retrieve identically tagged items easily at a later time. These tags are visible only to the user that applies them.</li> <li>■ You can tag items with a managed tag, if you have any of these available to you. Managed tags are created in the Veritas Alta View Compliance and Governance Management Console, under the <b>My Config &gt; Managed Tags</b> node.</li> <li>■ If your company uses the Veritas Alta Classification service, the service can apply classification tags to the emails, attachments, collaboration chats, and files that match the enabled policies in the Veritas Alta Classification. You can search for these classification tags as part of your eDiscovery work. Note that the classification tags cannot be applied manually.</li> </ul>

# Getting started with Alta eDiscovery

This chapter includes the following topics:

- [What's new in this release](#)
- [Signing in to Alta eDiscovery](#)
- [Logging off from Alta eDiscovery](#)
- [Resetting a forgotten password](#)
- [About the Alta eDiscovery user interface](#)
- [Accessing your own archived emails](#)

## What's new in this release

Veritas constantly works on improving the Veritas Alta Archiving product and introduces new features and enhancements release by release. For an easy-to-reference source for all the ways the product is changing, refer to the release notes and product documentation, which is available at:

[https://www.veritas.com/support/en\\_US/article.100040129](https://www.veritas.com/support/en_US/article.100040129)

We also recommend watching [this space](#) for the most up-to-date information on the updates, patches, and Late Breaking News for Veritas Alta Archiving.

# Signing in to Alta eDiscovery

When your company signs up for Alta eDiscovery, you are provided with a user name and password. With these credentials, you can log on to Alta eDiscovery and start using the features that you have the permissions to access.

---

**Note:** Alta eDiscovery users should exercise caution when accessing their accounts from public computers, to maintain the confidentiality of company emails. This note applies especially for administrators and reviewers.

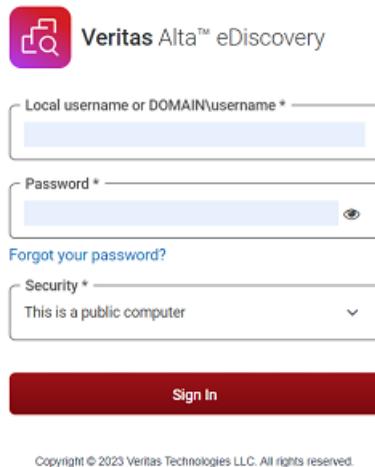
---

**Note:** If your company signed up for Alta eDiscovery and you have not received your credentials, contact your administrator.

---

## To log on to Alta eDiscovery

- 1 Navigate to your Alta eDiscovery URL.



Veritas Alta™ eDiscovery

Local username or DOMAIN\username \*

Password \*

[Forgot your password?](#)

Security \*  
This is a public computer

Sign In

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- 2 Enter your username or DOMAIN\username and password.

If you have problems accessing your account, check with your administrator first. If you continue to have difficulty logging on, contact your Technical Support Staff through your administrator.

### 3 Select a **Security** option.

Refer to the following table for more information:

<b>This is a public or shared computer</b>	Prompts you for your user name and password each time you access the logon screen, and logs you out after 20 minutes of inactivity.  Default option selected
<b>This is a private computer</b>	Your credentials are stored in your browser's local profile cache for three months, letting you bypass the logon screen after your initial successful logon.  You can clear this setting by logging out of Alta eDiscovery.

### 4 Click **Sign In**.

### 5 If the multi-factor authentication (MFA) is enabled for you, the **OTP** field appears on the authentication screen.

This email-based authentication and the Time-based One Time Password (TOTP) authentication enhances the access and data security of Management Console. Administrators have the permission to enable or disable multi-factor authentication at the user and tenant level.

- If the **email-based authentication (EML)** is enabled for you, a one-time password (OTP) is sent to your registered email address for authentication and access to the application. This OTP remains valid for 5 minutes from the time of receiving the email.  
Manually enter the OTP on the authentication screen within 5 minutes. Copy-pasting the OTP is not allowed. If you fail to provide OTP within 5 minutes of receiving it, the application displays a message that the OTP has expired. To obtain a new OTP, click **Resend OTP**. The application sends a new OTP.
- If the **Time-based One Time Password authentication (TOTP)** is enabled for you, the application redirects you to an **Authenticator Setup** page as shown in the sample image below.  
Scan the QR Code using the Google or Microsoft **Authenticator** app on your mobile phone at the time of your first login  
Configure the Authenticator app on your mobile phone.  
Click **Continue** to get a time-based OTP in the Authenticator app.  
Enter that OTP in the **OTP** field of the Authentication page, and click **Continue**.

## Configuring the Authenticator app on your mobile phone

If you have previously created an account for same user, please remove that entry and attempt to complete the setup again.

### To install the Microsoft Authenticator app on your phone

- 1 While installing the app, if prompted, allow notifications about the app.
- 2 Upon installation, open the app and click the plus (+) icon at top and select **Work or School account** or **Other account**.
- 3 Add your work account by using any of the following methods:
  - Use the installed authenticator app to scan the QR Code provided on the authentication page of Veritas Alta Archiving application.
  - Sign in with your application credentials and follow the screen instructions.

Upon successful scanning or signing in, your account gets connected to Microsoft Authenticator.

### To install the Google Authenticator app on your phone

- 1 While installing the app, if prompted, allow notifications about the app.
- 2 Upon installation, log in with your Google account credentials. Scroll down and click the plus (+) icon.
- 3 Scan the QR Code with the Google Authenticator app. Your account gets connected to the Google Authenticator app.

## Resetting the Authenticator device

If you accidentally remove the account from authenticator app or misplace the device on which the app is installed, you can contact your administrator to request for resetting the Authenticator device for you.

## About the New Features updates

Upon successful sign-in, the **New Features** window appears, presenting the latest release updates for Veritas Alta View Compliance and Governance Management Console, Alta eDiscovery, Alta Personal Archive, Alta Capture, and Alta Surveillance as shown in the sample image below.

- To temporarily hide this window, click **Close**.
- To access this window later, click the profile icon and choose **Show New Features**.
- To permanently hide this window, click **Do Not Show Again**. Subsequently, upon next login, this window will no longer appear. To enable its visibility, contact

your system administrator. However, it will reappear automatically with the next release updates.

- To read the complete release notes document, click **View Detailed Release Notes**.

## Logging off from Alta eDiscovery

### To log off from Alta eDiscovery

- 1 On the Alta eDiscovery user interface, in the upper right-hand corner, click the user profile icon.
- 2 Click **Log Off**.

## Resetting a forgotten password

If you forget your password and need help resetting it, Alta eDiscovery can help you by sending a Reset Password link to your authenticated user name (email address).

### To reset your forgotten password

- 1 On the authentication screen, click the **Forgot your password** link.
- 2 In the **User Name** field, provide your user name (email address).
- 3 In the **Validation Code** field, enter the correct captcha from the image, without spaces. Letters are not case-sensitive.

You cannot sign in if your archive fails to authorize your location or computer. You can contact system administrator for assistance.

- 4 Click **Send**.

The application sends you an email with a reset password link. Check your email inbox, including the spam or junk folder, for this message. This link expires after 30 minutes from you receive the email.

- 5 Open the password reset email and click on the provided **Reset Password** link.

The application directs you to a **Reset Password** page.

- 6 Type your user name, a new password, retype to confirm it, and click **Submit**.

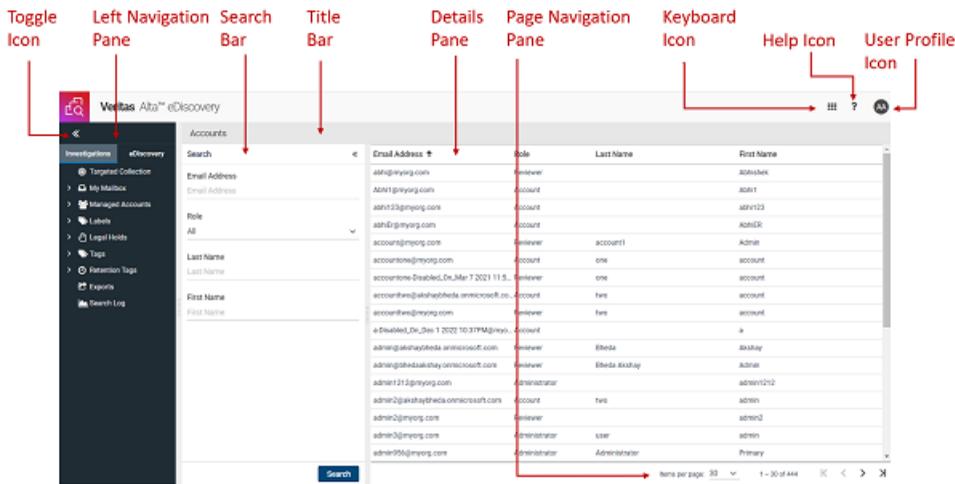
After successful reset, you receive an email notification that your password has been changed successfully.

# About the Alta eDiscovery user interface

Figure 2-1 shows a typical view of the Alta eDiscovery user interface that an eDiscovery Administrator can see. All the tabs, options, and icons are clearly arranged with the modern layouts to ensure user friendliness. For easy navigation throughout the application, panes can be hidden and displayed as required. The options are easily available to navigate to the **Veritas Alta View Compliance and Governance Management Console**, the **Veritas Alta Personal Archive**, and the **Veritas Alta Surveillance** portals.

**Note:** The tabs, the nodes within each tab, and the features varies with the roles and privileges of your Veritas Alta Archiving account.

**Figure 2-1** Alta eDiscovery User Interface



The selection tabs in the left navigation pane control access to the various functions and features of Alta eDiscovery.

After logging in to Alta eDiscovery, the landing page visible to you by default depends on your role in Alta eDiscovery. The following table explains the role and the corresponding landing page.

Role	Default landing page
Administrator	eDiscovery > Reviewers
External reviewer	eDiscovery > Cases

Role	Default landing page
Internal reviewer (if managed accounts are assigned)	Investigations > Managed Accounts > Accounts
Internal reviewer (if managed accounts are assigned)	Investigations > My Mailbox > Mailbox
	<ul style="list-style-type: none"><li>■ See <a href="#">“About the left navigation pane”</a> on page 23.</li><li>■ See <a href="#">“About the title bar options”</a> on page 25.</li><li>■ See <a href="#">“About the search bar”</a> on page 26.</li><li>■ See <a href="#">“About the bottom navigation bar”</a> on page 26.</li><li>■ See <a href="#">“About the Details pane”</a> on page 26.</li></ul>

## About the left navigation pane

The navigation pane that appears on the left side of the page contains the **Investigations** and the **eDiscovery** tabs. You can easily switch between these tabs as required. The Toggle icon allows you to expand and collapse the left navigation pane for a better visibility of the content in the panes available in the right side of the page.

### Investigations tab

The **Investigations** tab provides access to your own archived emails. Administrators and reviewers can also use this tab to access and review the archived emails of user accounts that they manage. External reviewers do not have access to the Investigations tab.

The following nodes are available from the Investigations tab, depending on your account permissions:

- The **Targeted Collection** node is used to create a targeted collection in Alta eDiscovery console. These collections are the cloned data of an archive collector that is configured in the Archive Administrator console.
- The **My Mailbox** node is where you can view all of your archived emails, including the emails that were deleted from your email inbox. Note that when viewing your archived emails, certain Personal.cloud features such as search filters and active folders are not available from Alta eDiscovery. See [“Accessing your own archived emails”](#) on page 27.
- The **Managed Accounts** node is available to users with the Reviewer role, and to administrators with the Monitor All Accounts privilege. The accounts that are

assigned to you display when you select the Accounts sub-node. You can use the features available from the Managed Accounts node to conduct initial, probative, or ad hoc investigations, outside of the legal discovery workflow.

See [“About Investigations”](#) on page 35.

- The **Labels** node is where you can create labels. The emails are classified and displayed based on the labels applied to them. You can click the label to view emails and collaboration messages to which that label is applied.
- The **Legal Holds** node is where you can view emails with a legal hold.
- The **Tags** node lets you view and manage the custom tags and the emails with those tags that have been applied in the Investigations tab.
- The **Retention Tags** node displays the emails to which retention tags are applied.
- The **Exports** node lets you view the status of email exports that you perform from the Investigations tab.
- The **Search Log** node is where you can see the Search-specific logs.
- The **Continuity - Standby** node is an add-on service that provides a "standby mailbox". It enables users to continue to send and receive emails when your organization's mail server is unavailable.

## eDiscovery tab

The eDiscovery tab includes the case management feature. This feature allows multiple reviewers to interact and collaborate on litigation cases during the eDiscovery process. Once a case has been created, an eDiscovery Administrator or an assigned reviewer can use searches to find the emails relevant to the case. These searches can then be saved, and the resulting emails assigned to the various reviewers that have been nominated to work on the case. This distribution of the workload among the reviewers expedites the eDiscovery process.

During the review process, reviewers can place emails on legal hold, apply review status tags and labels, and apply custom tags. Reviewers can also add notes to emails that other reviewers who work on the case can view. Additionally, collaborative eDiscovery includes various reporting features, that allow reviewers to view audit trails for individual emails or the history of an entire case.

See [“About cases”](#) on page 183.

The following nodes are available from the eDiscovery tab, depending on your account permissions:

- The **Dashboard** node lets you view and export cases summary reports.
- The **Reviewers** node lets you view Mailbox and Case access detail of the reviewers. You can export the reviewers summary reports for later use.

- The **Review Status** node lets you define the review status tags and define the active and default tags.
- The **Redaction Reasons** node lets you add and delete the reasons that you can use during creating production sets.
- The **Cases** node lets you manage cases that are assigned to you. After you select the case, the separate case-specific node appears below the Cases node to perform various operations.

## About the title bar options

The title bar contains the following icons:

- **Keyboard:** You can use this icon to access (navigate to) the Veritas Alta View Compliance and Governance Management Console, the Veritas Alta Personal Archive portal, and the Veritas Alta Surveillance portal.
  - The **Veritas Alta View Compliance and Governance Management Console** option provides administrators with access to the Veritas Alta View Compliance and Governance Management Console. The Veritas Alta View Compliance and Governance Management Console appears in a new web browser tab. It enables administrators to configure archive settings and to assign roles, including the roles that control the access to Alta eDiscovery. Role assignment is only available to System Administrators or to Role Managers with the required permissions.
  - The **Veritas Alta Personal Archive** option provides administrators with access to the Veritas Alta Personal Archive console.
  - The **Veritas Alta Surveillance** option provides administrators with access to the Veritas Alta Surveillance console.

See [“About account roles and Alta eDiscovery”](#) on page 29.

For reviewers and users with the Account role, the Administration option displays options to change your password and personal time zone.

- **Help:** You can use this icon to access user help documentation of Veritas Alta eDiscovery.
- **User Profile:** You can use this icon to view the alerts, statistics, time zone, and change password options. These options varies with your role. You can log off your on-going session by selecting the log off option.
  - The **Alerts** option allows administrators and reviewers to quickly and easily create alerts. Alerts are a helpful tool for administrators and reviewers, as they help monitor your company's email usage.  
See [“Creating an alert”](#) on page 309.

- The **Statistics** option provides administrators with archive statistics. The statistics available from this tab include Number of active accounts, Top policy alerts trending, Number of emails received, and Average mailbox size. This option is not available for a reviewer or account users.
- The **Set Time Zone** option allows reviewers and account users to select the appropriate time zone for them.
- The **Log Off** option lets you to log off securely from the current session of Alta eDiscovery.

## About the search bar

Use the quick search to quickly find content on the page. You can also click the arrow in the search field, to search using the Criteria Search filter.

See [“About Quick Search and Criteria Search”](#) on page 335.

## About the bottom navigation bar

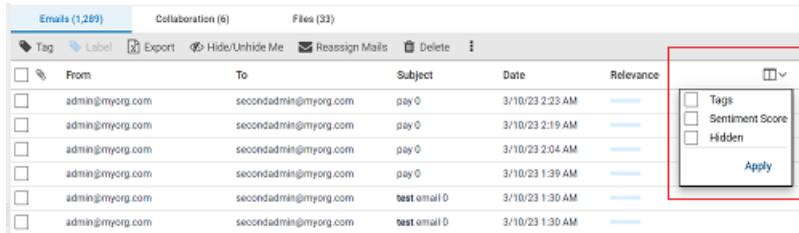
This bar displays total number of pages, total number of records on a page, and the navigation options that are supported for multi-page lists.

- Click on the page number to display and navigate to a selected page.
- Click the |< icon to go to the First page of the list.
- Click the >| icon to go to the Last page of the list.
- Click the < icon to go to the Previous page of the list.
- Click the > icon to go to the Next page of the list.

## About the Details pane

This pane displays the records with subsequent details. You can click on the column headings to sort the data either in ascending or descending order for one or more columns on the selected page.

For a better readability purpose, this pane shows limited columns. To view the additional columns on the page, click the **Columns** icon as shown in the sample image below. Select the additional columns you want to see and click **Apply**.



The screenshot shows an email search results interface. At the top, there are three tabs: "Emails (1,289)", "Collaboration (6)", and "Files (33)". Below the tabs is a toolbar with icons for "Tag", "Label", "Export", "Hide/Unhide Me", "Reassign Mails", and "Delete". The main area is a table with columns: From, To, Subject, Date, and Relevance. The table contains six rows of email data. A dropdown menu is open on the right side of the table, showing options: "Tags", "Sentiment Score", and "Hidden", with an "Apply" button at the bottom.

	From	To	Subject	Date	Relevance
<input type="checkbox"/>	admin@myorg.com	secondadmin@myorg.com	pay 0	3/10/23 2:23 AM	-----
<input type="checkbox"/>	admin@myorg.com	secondadmin@myorg.com	pay 0	3/10/23 2:19 AM	-----
<input type="checkbox"/>	admin@myorg.com	secondadmin@myorg.com	pay 0	3/10/23 2:04 AM	-----
<input type="checkbox"/>	admin@myorg.com	secondadmin@myorg.com	pay 0	3/10/23 1:39 AM	-----
<input type="checkbox"/>	admin@myorg.com	secondadmin@myorg.com	test email 0	3/10/23 1:30 AM	-----
<input type="checkbox"/>	admin@myorg.com	secondadmin@myorg.com	test email 0	3/10/23 1:30 AM	-----

---

**Note:** The **Columns** functionality is available for all the searches in the **Investigation** and **eDiscovery** tabs. However, for Advanced ECA searches, this functionality is available for **Files** tab only, and not for **Emails** and **Collaboration** tabs.

---

## Accessing your own archived emails

Alta eDiscovery users can view and access their own archived emails from the **Investigations** tab > **My Mailbox** node. You can view all of your archived emails, including the emails that were deleted from your email inbox.

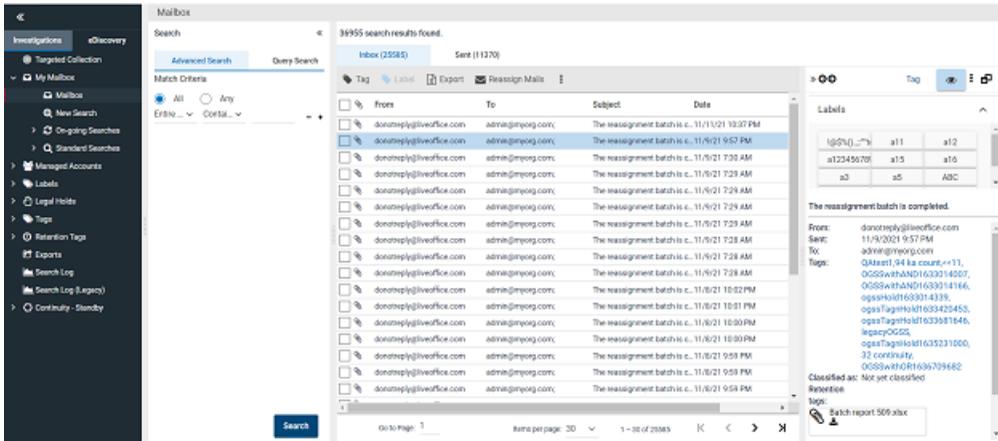
**My Mailbox** has similar functionality to your Alta Personal Archive archive. You can view and search your own emails. You can also reply and forward your emails from here. You cannot restore emails to your own account from Alta eDiscovery and can only restore mails to the accounts which you monitor.

---

**Note:** When you view your archived emails, certain Alta Personal Archive features such as search filters and active folders are not available from Alta eDiscovery.

---

When you select an email from the list, a preview pane displays the message. You can move this preview pane to underneath or to the right side of the main pane. The preview pane displays the message content and any attachments that are included with the original email.



You can double-click an email in the list to open the email in a separate window.

Below the **Subject**, **From**, **Sent**, and **To** information in the email header, you can see listed any attachments and also any custom tags or classification tags that are applied to the email. The custom tags and classification tags are typically for use with eDiscovery tasks.

# Alta eDiscovery roles

This chapter includes the following topics:

- [About account roles and Alta eDiscovery](#)
- [Account role](#)
- [Reviewer role](#)
- [Administrator role](#)
- [Assigning account roles](#)

## About account roles and Alta eDiscovery

Veritas Alta Archiving accounts are each assigned to one of the following roles:

- **Account**
- **Reviewer**
- **Administrator**

System Administrators and Role Managers with the required privileges can assign accounts to one of these roles in the **Role Management** node of the Veritas Alta View Compliance and Governance Management Console.

The role to which your account is assigned and the associated privileges that are granted to it determine the menu options and features that you can access from Alta eDiscovery.

## Account role

Available Alta eDiscovery tabs: **Investigations** in the left navigation pane and the **Administration** option on the Profile icon in the top-right corner of the application page (for setting personal preferences only).

Users with the **Account** role have the least access to Alta eDiscovery. They have access only to the **Investigations** tab, from where they can view their own archived emails.

Note that Alta Personal Archive is the preferred access method for users to view archived emails. Alta Personal Archive allows users to tag and restore archived emails into their own inbox.

---

**Note:** In one case, those accounts with the **Account** role can have greater access in Alta eDiscovery. Administrators can configure the account in Archive Administration to make it an **External Reviewer**. These accounts are for users who are not part of your organization, but who need to review emails within the cases that are assigned to them#. External reviewers have their account disabled for archiving, and can only access the **eDiscovery** tab in Alta eDiscovery. Within the **eDiscovery** tab the external reviewers can perform similar tasks as those accounts with the **Reviewer** role.

See the Archive Administration help for more information about creating **External Reviewer** accounts.

---

## Reviewer role

Available Alta eDiscovery tabs: **Investigations** and **eDiscovery** in the left navigation pane, and the **Administration** option on the Profile icon in the top-right corner of the application page (for setting personal preferences only), and **Alerts** option on the Profile icon in the top-right corner of the application page.

Users with the **Reviewer** role can monitor employee emails for the material that does not follow company communication policies. An administrator or HR representative typically reviews the email of reviewers, so that no employees are exempt from following company communication policies. Organizations should take special care in selecting the appropriate employees for the **Reviewer** role, since reviewers can see other employees' emails. Reviewers should not share their user name and password with anyone.

When you assign an account the **Reviewer** role, you can allow the account to monitor all of the accounts in Veritas Alta Archiving, or a selected subset. You can

use the **Disable preview mail** check box to prohibit email preview. It limits reviewers to only check the emails between sender and recipients.

In the **Investigations** tab, reviewers can perform open-ended investigative searches against one or all of the accounts that they have the permissions to monitor.

In the **eDiscovery** tab, reviewers have access only to those cases that are assigned to them.

When the eDiscovery Administrator creates a case, they assign the case to one or more reviewers. Each reviewer can be assigned a set of permissions within each case. A reviewer can perform some or all of the following functions within a case, depending on the permissions that they are assigned for that case:

- Review the emails that result from the searches that are associated with the case.
- View the case logs and reports.
- Manage on-going and standard searches of emails.
- Perform and manage searches on the emails that are associated with the case.
- Export emails.
- Place emails on legal hold.
- Edit the case for example to reassign searches to different reviewers.

---

**Note:** Accounts with the **Reviewer** role only see the **eDiscovery** tab once they have been assigned as a reviewer to at least one case.

---

## Administrator role

Available Alta eDiscovery tabs: **Investigations**, **eDiscovery** tabs in the left navigation pane, and the **Alerts** and **Statistics** option on the Profile icon in the top-right corner of the application page.

The **Administrator** role is for company administrators who need to configure and manage Alta eDiscovery, or for HR personnel who need to monitor employee email usage.

**Administrator** roles must be assigned the **Monitor All Accounts** privilege in the Veritas Alta View Compliance and Governance Management Console if they are to monitor email usage. Unlike the accounts with the **Reviewer** role, the accounts with the **Administrator** role cannot be granted access to selected accounts only.

Accounts with the **Administrator** role and with the **Monitor All Accounts** privilege can be assigned to cases as reviewers, and can act as reviewers in the same way as the accounts with the **Reviewer** role.

Administrators can also receive email notifications each time a message is flagged in the Alerts area.

---

**Note:** Accounts with the **Administrator** role can be assigned additional privileges in Archive Administration, including the privileges that can be conferred by built-in group roles. The accounts with the **Administrator** role that are also assigned the **eDiscovery Administrator** built-in role have full access to all the features of Alta eDiscovery.

---

The eDiscovery Administrators can configure and manage all aspects of Alta eDiscovery, including the following:

- Creating, viewing, and editing cases
- Managing reviewers
- Adding and editing labels
- Assigning review status tags to emails
- Managing case review status tags
- Managing searches under cases
- Exporting emails from cases
- Viewing logs and saving reports

Given the sensitive nature of the information available to administrators, they should take special care to protect their logon credentials.

## Assigning account roles

To assign roles to an account you must be a System Administrator or have the required **Modify Privileges** privilege.

Administrators can access the Veritas Alta View Compliance and Governance Management Console from the **Administration** option on the Profile icon in the top-right corner of the application page.

- See [“Assigning the Reviewer role to an account”](#) on page 33.
- See [“Assigning the Administrator role to an account”](#) on page 33.

## Assigning the Reviewer role to an account

To assign roles to an account you must be a System Administrator or have the **Modify Privileges** privilege.

### To assign the Reviewer role to an account

- 1 In Alta eDiscovery, click the profile icon available in the top-right corner of the application page and select **Veritas Alta View Compliance and Governance Management Console**. The management console opens in a new browser window.
- 2 Log on to the Veritas Alta View Compliance and Governance Management Console as a System Administrator or with an account that has the **Modify Privileges** privilege.
- 3 Under the **Role Management** node, select **Assign Accounts**.
- 4 From the list of accounts, select the required user.
- 5 Select **Reviewer** from the **Role** drop-down menu.
- 6 Do the following:
  - Select the **Monitor All Accounts** check box to allow the user to monitor all user accounts.
  - If required, select the **Disable preview mail** to prohibit the reviewer from viewing preview of email content.
  - Or click **Add/Remove Monitored Accounts** and select the accounts for this reviewer to monitor.

When you have selected the required accounts, click **Update** and then click **Close** to close the **Add/Remove Monitored Accounts** window.

In the **Accounts to Monitor** list, if you want the reviewer privilege to expire for any account, clear the check box in the **Never Expires** column for that account. Then in the **Expiration** column, click the **Calendar** icon and select the date that you want the reviewer privilege to expire.
- 7 Click **Save** to save the role changes for the account.

## Assigning the Administrator role to an account

To assign roles to an account you must be a System Administrator or have the **Modify Privileges** privilege.

**To assign the Administrator role to an account**

- 1 In Alta eDiscovery, click the profile icon available in the top-right corner of the application page and select **Veritas Alta View Compliance and Governance Management Console**. The management console opens in a new browser window.
- 2 Log on to the Veritas Alta View Compliance and Governance Management Console as a System Administrator or with an account that has the **Modify Privileges** privilege.
- 3 Under the **Role Management** node, select **Assign Accounts**.
- 4 Select the required user from the list of accounts.
- 5 From the **Role** drop-down menu, select **Administrator**.
- 6 To allow the account to monitor all user accounts, select the **Monitor All Accounts** check box.  
  
If you do not select this option the account cannot view any user accounts other than their own.
- 7 If you want to assign **eDiscovery Administrator** privileges to the account, under **Built-in Roles** select the **eDiscovery Administrator** check box.
- 8 Click **Save** to save the role changes for the account.

# Managing investigations

This chapter includes the following topics:

- [About Investigations](#)
- [About Targeted Collections](#)
- [About Managed Accounts](#)
- [About Searches in investigation](#)
- [Working with searched emails](#)
- [Working with searched collaboration messages](#)
- [Working with searched files](#)
- [Working with Advanced ECA searches](#)
- [About Mail Reassignment](#)
- [About labels](#)
- [About legal holds](#)
- [About Tags](#)
- [About search log](#)

## About Investigations

From the Alta eDiscovery **Investigations** tab, administrators or reviewers can conduct initial, probative, or ad hoc investigations on the archives of the accounts that they have the privileges to monitor. For example, you can assess compliance to corporate content or regulatory policies before deciding whether there is a requirement to create a tracked eDiscovery case.

Typically, an investigation is an internal search. For example, you can assess compliance to corporate content policies, or respond to a request to find private information on a user. You can search for data in the items of multiple user accounts all in one place.

You can search the archives of the accounts that you manage from the **Managed Accounts** node. From here you can access, review, and work with the archived items of interest as in the **eDiscovery** tab. The difference is that in the **Investigations** tab the search and the work that you do with the items is not tracked as part of a case. Also in investigations the review status tags are not available.

In investigations, permission to view the items of others is solely dependent on the roles and permissions of your account as configured in Archive Administration. The constraints that are enforced within a case and a Review Set are not present.

## About Targeted Collections

You can create targeted collections in the Alta eDiscovery console. These collections are the cloned data of an archive collector that is configured in the Archive Administrator console.

The Alta eDiscovery reactive collector lets your organization collect content for eDiscovery purposes. After an administrator configures this collector for your organization, the content that matches the filter criteria can be collected in VAD

Before you create a targeted collection in Advanced Discovery console, ensure that, in Archive Administrator -

- the customer is already created
- the service for this collector is enabled for that customer
- the Archive Collector is configured

After you create a targeted collection, ensure that the configuration status is **Complete**. If the configuration is incomplete, user cannot be sent to case. User cannot remove the previously selected and saved options.

## Configuring Targeted Collection for Microsoft Teams

### To configure Targeted Collection for Microsoft Teams

- 1 On the **Investigations** tab, in the left navigation pane, select **Targeted Collection**.
- 2 Click **Add** to set up Microsoft Teams collector.

---

**Note:** At the time of adding the first collector, the **Setup Collection** button appears in the middle of the screen. If one or more collectors are already added, the **Add** option appears.

---

- 3 On the **Collection Information** tab, specify the following:

Collection name	Provide a unique name for this collection.
Email	Enter email to get notification once the targeted collection has finished processing.
Select a collector to get data from	Select the Microsoft Teams collector that is already configured in Veritas Alta Archiving Veritas Alta View Compliance and Governance Management Console.

- 4 Click **Save and Next** to navigate to the **Filters** tab.
- 5 On the **Filters** tab, specify the following:

User source configuration

- Select the **All users** option to include all the available users.
- Select the **Select users from list** option to open the list of all users. Select the users whose activities you want to collect., and click **Confirm**.

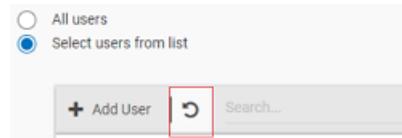
**Synchronizing user accounts:**

To get the latest user list, click the **Sync** icon. This synchronization process may take several minutes as it synchronizes all the accounts from the content source.



**Resetting current user selection:**

Click the **Reset** icon to reset the list of monitored users to the lastly-saved selection.



Select matching method for the keyword search

Provide any words that you want to search in the collaboration messages. Press ENTER to confirm the word or a phrase.

You can enter multiple words and phrases.

Select **All** to consider all the specified words and phrases you want to search and collect.

Select **Any** to consider any of the specified words and phrases you want to search and collect.

Select date range

Specify the date range for collection. The available options are Before, After, and Between.

Captured Modern Attachment

Select any of the following options as required:

- **Latest version:** Select this option to capture the latest saved version of the shared document that is available at connector runtime.
- **Shared version:** Select this option to capture the saved version of the document at the time of sharing in Microsoft Teams.

**6** Click **Save and Next** to navigate to the **Send to Cases** tab.

**7** On the **Send to Cases** tab, specify the following:

Send to existing case      If you want to send the search result to a specific case, select this check box. This is not a mandatory field.

However, if you have selected this option, the application displays the list of available cases. Search for and select the cases to which you want to send the search result.

Use the navigation options to view cases available on the next and previous pages.

Collection set name      Enter the collection set name.

When you select a single or multiple cases in the **eDiscovery** tab, the node of this name is displayed under the **Case Documents** node.

After the targeted collector is configured and the displayed status is *Archived*, all the items are sent to this Collection Set in the respective cases under the **Case Documents** node.

**8** Click **Save and Next** to navigate to the **Review** tab.

**9** On the **Review** tab, do the following:

- Check the configuration information to ensure accuracy.
- To modify configuration information, click the corresponding **Edit** link.

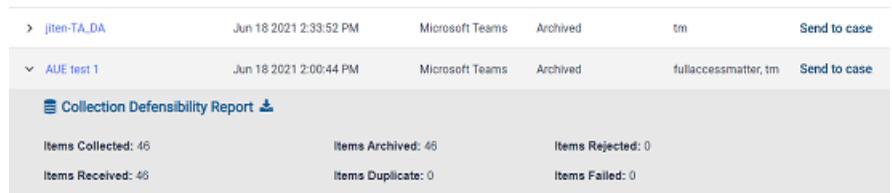
- 10** If the data is correct, click **Complete**.

The Microsoft Teams archive collector appears on the Targeted Collections page.

---

**Note:** If the status of the Microsoft Teams targeted collector is **Archived**, you can expand the targeted collector row to view the **Collection Defensibility Report** of the Teams-specific reactive data. It displays the details like Items Collected, Items Received, Items Archived, Items Duplicate, Items Rejected, and Items Failed. To download the Collection Defensibility Report, click the **Download** icon. See the sample image below:

---



- 11** If the status of the targeted collector is **Incomplete**, modify the collector configuration. To modify the configuration, click on the targeted collection name.

---

**Note:** If the configuration is incomplete, user cannot collect items properly. User cannot remove the previously selected and saved options.

---

- 12** If the status of the targeted collector is **Archived**, and you want to send items to cases, click **Send to case** in the respective row.

See [“Creating collection sets from archived targeted collector”](#) on page 59.

## Configuring Targeted Collection for OneDrive for Business

The OneDrive for Business reactive collector lets your organization collect files that are associated with customer’s OneDrive cloud storage. After an administrator configures this collector for your organization, the files that match the user source criteria can be collected in Alta eDiscovery.

You must configure the user source criteria for each OneDrive for Business reactive collector. Based on this user source criteria, the OneDrive reactive collector collects the files in Alta eDiscovery to perform all eDiscovery operations.

You can configure this targeted collection only if the **Alta eDiscovery** primary service and the **OneDrive for Business** secondary service is enabled for a required

customer is enabled in the Veritas Alta Archiving Veritas Alta View Compliance and Governance Management Console. You must possess the administrator role to configure the OneDrive for Business reactive collector synchronization in Alta eDiscovery.

**To configure Targeted Collection for OneDrive for Business**

- 1 On the **Investigations** tab, in the left navigation pane, select **Targeted Collection**.
- 2 Click **Add** and select the **OneDrive for Business** collector.

---

**Note:** At the time of adding the first collector, the **Set up Collection** button appears in the middle of the screen. If one or more collectors are already added, the **Add** option appears.

---

- 3 On the **Collection Information** tab, specify the following:

<b>Collection name</b>	Provide a unique name for this collection.
<b>Email</b>	Enter email to get notification once the targeted collection has finished processing.
<b>Select a collector to get data from</b>	Select the OneDrive for Business collector that is already configured in Veritas Alta Archiving Veritas Alta View Compliance and Governance Management Console.

- 4 Click **Save and Next** to navigate to the **Filter** tab.
- 5 On the **Filter** tab, specify the following:

- User source configuration**
- Select the **All users** option to include all the available users.
  - Select the **Select users from list** option to open the list of all users. Select the users whose activities you want to collect, and click **Confirm**.

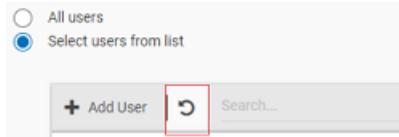
**Synchronizing user accounts**

To get the latest user list, click **Sync**. This synchronization process may take several minutes as it synchronizes all the accounts from the content source.



**Resetting current user selection:**

Click the **Reset** icon to reset the list of monitored users to the lastly-saved selection.



**Select matching method for the keyword search** Provide any words contained in the file name or other file metadata. Press ENTER to confirm the word or a phrase.

You can enter multiple words and phrases.

Select **All** to consider all the specified words and phrases you want to search and collect.

Select **Any** to consider any of the specified words and phrases you want to search and collect.

**Select date range**

Specify the date range for collection. The available options are Before, After, and Between.

- 6 Click **Save and Next** to navigate to the **Send to Cases** tab.

**7** On the **Send to Cases** tab, specify the following:

- |                       |   |
|-----------------------|---|
| Send to existing case | <p>If you want to send the search result to a specific case, select this check box. This is not a mandatory field.</p> <p>However, if you have selected this option, the application displays the list of available cases. Search for and select the cases to which you want to send the search result.</p> <p>Use the navigation options to view cases available on the next and previous pages.</p>     |
| Collection set name   | <p>Enter the collection set name.</p> <p>When you select a single or multiple cases in the <b>eDiscovery</b> tab, the node of this name is displayed under the <b>Case Documents</b> node.</p> <p>After the targeted collector is configured and the displayed status is <i>Archived</i>, all the items are sent to this Collection Set in the respective cases under the <b>Case Documents</b> node.</p> |

**8** Click **Save and Next** to navigate to the **Review** tab.

**9** On the **Review** tab, do the following:

- Check the configuration information to ensure accuracy.
- To modify configuration information, click the corresponding **Edit** link.

**10** If the data is correct, click **Complete**.

The OneDrive for Business archive collector appears in the Targeted Collections page.

---

**Note:** If the status of the OneDrive targeted collector is **Archived**, you can expand the targeted collector row to view the **Collection Defensibility Report** of the OneDrive-specific reactive data. It displays the details like Items Collected, Items Received, Items Archived, Items Duplicate, Items Rejected, and Items Failed. To download the Collection Defensibility Report, click the **Download** icon.

---

- 11 If the status of the targeted collector is **Incomplete**, modify the collector configuration. To modify the configuration, click on the targeted collection name.

---

**Note:** If the configuration is incomplete, items cannot be sent to case. User cannot modify the previously selected and saved options.

---

- 12 If the status of the targeted collector is **Archived**, and you want to send items to cases, click **Send to case** in the respective row.

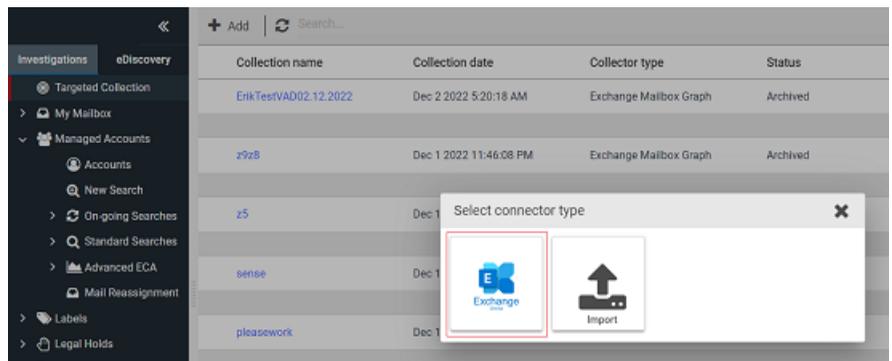
See [“Creating collection sets from archived targeted collector”](#) on page 59.

## Configuring Targeted Collection for Exchange Online

### To configure Targeted Collection for Exchange Online

- 1 On the **Investigations** tab, in the left navigation pane, select **Targeted Collection**.
- 2 Click **Add**.

The **Select Collector Type** pop up appears as shown in the sample image below:



- 3 Select **Exchange Online**.

**4** On the **Collection Information** tab, specify the following:

- |                                     |   |
|-------------------------------------|---|
| Collection name                     | Provide a unique name for this collection.  |
| Email                               | Enter email to get notification once the targeted collection has finished processing.   |
| Select a collector to get data from | Select the Exchange Online collector that is already configured in Veritas Alta Archiving Veritas Alta View Compliance and Governance Management Console. |

**5** Click **Save and Next** to navigate to the **Filters** tab.

**6** On the **Filters** tab, specify the following:

- |                           |  |
|---------------------------|--|
| User source configuration | <ul style="list-style-type: none"> <li>■ Select the <b>All users</b> option to include all the available users.</li> <li>■ Select the <b>Select users from list</b> option to open the list of all users. Select the users whose activities you want to collect., and click <b>Confirm</b>.</li> </ul> |
|---------------------------|--|

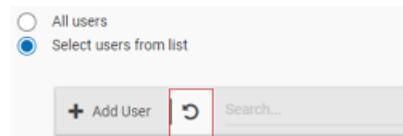
**Synchronizing user accounts:**

To get the latest user list, click the **Sync** icon. This synchronization process may take several minutes as it synchronizes all the accounts from the content source.



**Resetting current user selection:**

Click the **Reset** icon to reset the list of monitored users to the lastly-saved selection.



Select matching method for the keyword search Provide any words that you want to search in the email subject and email body content. Press ENTER to confirm the word or a phrase.

You can enter multiple words and phrases.

Select **All** to consider all the specified words and phrases you want to search and collect.

Select **Any** to consider any of the specified words and phrases you want to search and collect.

Select date range Specify the date range for collection. The available options are Before, After, and Between.

Captured Modern Attachment Select any of the following options as required:

- **Latest version:** Select this option to capture the latest saved version of the shared document that is available at connector runtime.
- **Shared version:** Select this option to capture the saved version of the document at the time of sharing in Microsoft Teams.

**7** Click **Save and Next** to navigate to the **Send to Cases** tab.

**8** On the **Send to Cases** tab, specify the following:

Send to existing case If you want to send the search result to a specific case, select this check box. This is not a mandatory field.

However, if you have selected this option, the application displays the list of available cases. Search for and select the cases to which you want to send the search result.

Use the navigation options to view cases available on the next and previous pages.

Collection set name Enter the collection set name.

When you select a single or multiple cases in the **eDiscovery** tab, the node of this name is displayed under the **Case Documents** node.

After the targeted collector is configured and the displayed status is *Archived*, all the items are sent to this Collection Set in the respective cases under the **Case Documents** node.

**9** Click **Save and Next** to navigate to the **Review** tab.

**10** On the **Review** tab, do the following:

- Check the configuration information to ensure accuracy.
- To modify configuration information, click the corresponding **Edit** link.

**11** If the data is correct, click **Complete**.

The Exchange Online archive collector appears on the Targeted Collections page.

---

**Note:** If the status of the Microsoft Teams targeted collector is **Archived**, you can expand the targeted collector row to view the **Collection Defensibility Report** of the Exchange Online-specific reactive data. It displays the details like Items Collected, Items Received, Items Archived, Items Duplicate, Items Rejected, and Items Failed. To download the Collection Defensibility Report, click the **Download** icon.

---

**12** If the status of the targeted collector is **Incomplete**, modify the collector configuration. To modify the configuration, click on the targeted collection name.

---

**Note:** If the configuration is incomplete, user cannot collect items properly. User cannot remove the previously selected and saved options.

---

**13** If the status of the targeted collector is **Archived**, and you want to send items to cases, click **Send to case** in the respective row.

See [“Creating collection sets from archived targeted collector”](#) on page 59.

## Configuring Targeted Collection for Enterprise Vault

The Enterprise Vault reactive collector lets your organization collect items that are associated with your Enterprise Vault. After an administrator configures this collector for your organization, the items that match the filter criteria can be collected in Alta eDiscovery.

You must configure the filter criteria for each Enterprise Vault reactive collector. Based on the filter criteria, the Enterprise Vault reactive collector collects the archive-level and vault-level data in Alta eDiscovery to perform all eDiscovery operations.

**Prerequisite:** Before you use the Enterprise Vault collector Alta eDiscovery to collect Enterprise Vault content, you need to enable this service. To enable Enterprise Vault service, do the following:

1. Contact Veritas support team to enable the Enterprise Vault collector in Veritas Alta Archiving.

2. Install the Enterprise Vault Agent on a server that can access your Enterprise Vault environment.

You can download the Enterprise Vault Agent from  
[https://www.veritas.com/support/en\\_US/downloads](https://www.veritas.com/support/en_US/downloads)

3. Refer the following procedure to configure the Targeted Collection for Enterprise Vault.

#### **To configure Targeted Collection for Enterprise Vault**

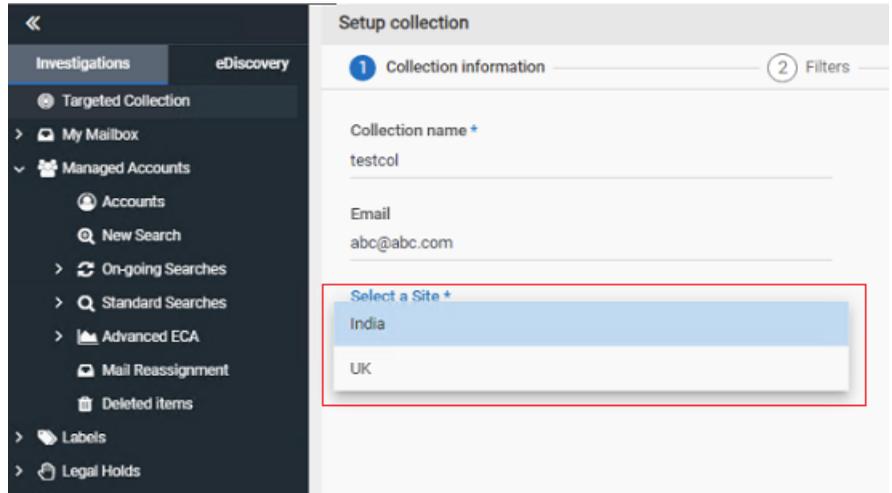
- 1 On the **Investigations** tab, in the left navigation pane, select **Targeted Collection**.
- 2 Click **Add** and select the Enterprise Vault collector.

---

**Note:** At the time of adding the first collector, the **Set up Collection** button appears in the middle of the screen. If one or more collectors are already added, the **Add** option appears.

---

**3** On the **Collection Information** tab, specify the following:



- |                 |   |
|-----------------|---|
| Collection name | Provide a unique name for this collection. Veritas Alta Archiving   |
| Email           | Enter email to get notification once the targeted collection has finished processing.   |
| Select a site   | <p>If you have multiple sites in your Enterprise Vault environment or have multiple individual Enterprise Vault environments, the application displays a list of all sites which this tenant has as a part of direct migration agent configuration.</p> <p>Select a required site from the displayed options.</p> |

**4** Click **Save and Next** to navigate to the **Filter** tab.

**5** On the **Filter** tab, do the following:

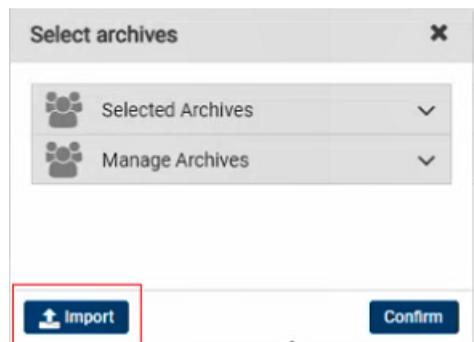
- |      |  |
|------|--|
| Date | Specify the date range for collection. The available options are Before, After, and Between. |
|------|--|

Vault stores and Archives

Select the appropriate vault stores or archives in which you want to search the data.

It supports selecting vault stores and archives from multiple sites.

- Select the **All vault stores** option to consider all the available vault stores to search items.
- Select the **Selected vault store(s)** option to select the required vault stores for the selected archives. The **Select vault(s)** button appears. Click **Select vault(s)** to search for and select the required vaults for searching items. You can remove the selection from the same dialog box.
- Select the **All archives** option to consider all the available archives to search items.
- Select the **Selected archive(s)** option to select the required archives. The **Select archive(s)** button appears. Click **Select Vault(s)** to search for and select the required archives for searching items. You can remove the selection from the same dialog box.
- If you have many archives for targeted collection, use the **Import** functionality that supports importing data in the CSV format. Click **Import**, and choose a CSV file with the list of archives.



The CSV file must contain Archive IDs in the first column.

	A	B
1	100E5E8F46AB786418268BAE3BC789E981110000r22evsrv	
2	101A31221C13C0B478B6E281683AA1C731110000r22evsrv	
3	1159690343B3C274792970FB92B2272DB1110000r22evsrv	
4	1182D7B54A92E9F4FA103EA05862C052E1110000r22evsrv	
5	136A3FE3A6C15CE439DA21E9425E745891110000r22evsrv	
6	149037CF6996E364EB491A2ED088D2F291110000r22evsrv	
7	151DE96DDAB9081439C39ACDD0504199031110000r22evsrv	
8	15CE8C0D9E333E4498F4E53C364042F921110000r22evsrv	
9	163C609F52A1B6498BFFA4CC905210E01110000r22evsrv	
10	16DCE18EDDE91244B89E9A41876908B8961110000r22evsrv	
11	1785C6F5738DA9B4C9C51E7EF5605FD341110000r22evsrv	
12	1ADDA7085FD342F4E8D88393FE55927C1110000r22evsrv	
13	1BC1B30334D617A42AD5641DB311997621110000r22evsrv	
14	1C5377BEC953D748982B93D3135834E61110000r22evsrv	
15	1E5A348875439F84883168F747EBD48C31110000r22evsrv	
16	1EBF1686796BE63468DD0EBF336E62001110000r22evsrv	
17	1EE698C1F37BF17478724A1E7F9C577701110000r22evsrv	
18	1F408C3C67E260A449BE7F84EC249759E1110000r22evsrv	
19	1C03924025DA984449617FBA1C7F311741110000r22evsrv	
20	14CFB8AF5AFD74A4DA4CA7319BCD896561110000r22evsrv	
21		

The file should not contain any other information. It may lead to error during the import.

**Search terms**

Specify the criteria with the help of keywords. It helps you to restrict searching items from the selected vault stores and archives.

Use the plus-icon to save the search term and add a new criteria under the **Search terms** section.

Use the minus-icon to remove an existing criteria.

**Attachments**

Specify the file types (Enterprise Vault compatible file extensions such as .pdf, .doc, .zip, and so on) that you want to collect during data collection from Enterprise Vault.

**Custom attributes**

Specify attributes that you want to include in the search configuration.

If you want to provide several attributes, specify either **All of** or **Any of** option under the **Attribute inclusion** section. It determines whether the search results should match any of the attributes or all of them.

**6** Click **Save and Next** to navigate to the **Send to Cases** tab.

**7** On the **Send to Cases** tab, specify the following:

- |                       |   |
|-----------------------|---|
| Send to existing case | <p>If you want to send the search result to a specific case, select this check box. This is not a mandatory field.</p> <p>However, if you have selected this option, the application displays the list of available cases. Search for and select the cases to which you want to send the search result.</p> <p>Use the navigation options to view cases available on the next and previous pages.</p>     |
| Collection set name   | <p>Enter the collection set name.</p> <p>When you select a single or multiple cases in the <b>eDiscovery</b> tab, the node of this name is displayed under the <b>Case Documents</b> node.</p> <p>After the targeted collector is configured and the displayed status is <i>Archived</i>, all the items are sent to this Collection Set in the respective cases under the <b>Case Documents</b> node.</p> |

**8** Click **Save and Next** to navigate to the **Review** tab.

**9** On the **Review** tab, do the following:

- Check the configuration information to ensure accuracy.
- To modify configuration information, click the corresponding **Edit** link.

**10** If the data is correct, click **Complete**.

The Enterprise Vault reactive collector appears in the Targeted Collections page.

**Note:** If the status of the Enterprise Vault targeted collector is **Archived**, you can expand the targeted collector row to view the **Collection Defensibility Report** of the Enterprise Vault reactive data. It displays the details like Items Collected, Items Received, Items Archived, Items Duplicate, Items Rejected, and Items Failed. To download the Collection Defensibility Report, click the **Download** icon. See the sample image below:

Collection name	Collection date	Collector type	Status	Case sent
Evtest_1	Feb 16 2022 4:21:51 AM	Enterprise Vault	0 % Completed	Send to case
3rd_Ev_collector	Jan 12 2022 1:29:40 AM	Enterprise Vault	Archived	Send to case
<b>Collection Defensibility Report</b>				
Items Collected: 0	Items Archived: 5	Items Rejected: 0		
Items Received: 3	Items Duplicate: 3	Items Failed: 0		
3rd_Ev_EmailCollector	Jan 12 2022 12:57:46 AM	Enterprise Vault	Archived	NMLExt Send to case

**11** If the status of the targeted collector is **Incomplete**, modify the collector configuration. To modify the configuration, click on the targeted collection name.

**Note:** If the configuration is incomplete, items cannot be sent to case. User cannot remove the previously selected and saved options.

**12** If the status of the targeted collector is **Archived**, and you want to send items to cases, click **Send to case** in the respective row.

See [“Creating collection sets from archived targeted collector”](#) on page 59.

## Configuring Targeted Collection for data import

The data (files) import collector lets your organization collect files. This collector supports files with extension ZIP, PDF, DOC, DOCX, PPT, PPTX, XLS, XLSX, CSV, PST, EML, MSG, and DAT. You can compress these extension files into ZIP file for import. After an administrator configures this importer, the files uploaded in this importer gets processed.

**Prerequisite:** Before you configure a file importer in Alta eDiscovery, the Veritas Alta View Compliance and Governance Management Console administrator must create and enable the **Data Uploading** archive collector in Veritas Alta View Compliance and Governance Management Console.

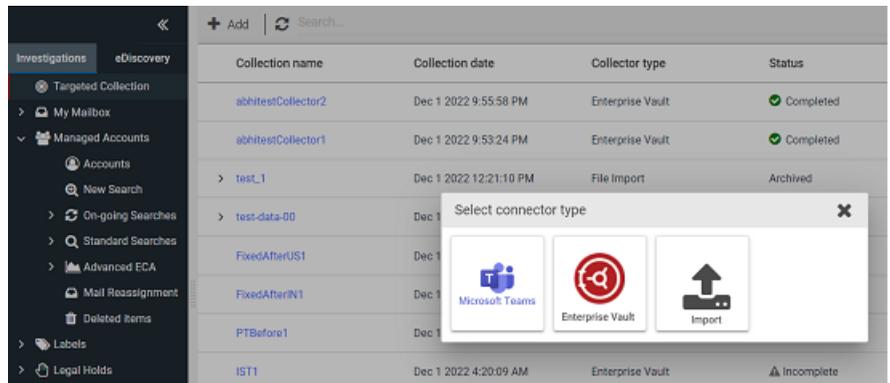
Before you import files in the importer, you must understand the following conditions:

- This type of collector supports ZIP, PDF, DOC, DOCX, PPT, PPTX, XLS, XLSX, CSV, PST, EML, MSG, and DAT file extensions.
- Each file should not exceed 2 GB size.
- Total upload size should not exceed 20 GB size.
- ZIP file inside ZIP file will not get processed.
- After you upload the files using collector, you cannot upload more files in same collector.

**To configure targeted collection for data import**

- 1 On the **Investigations** tab, in the left navigation pane, select **Targeted Collection**.
- 2 Click **Add** to set up data importer.

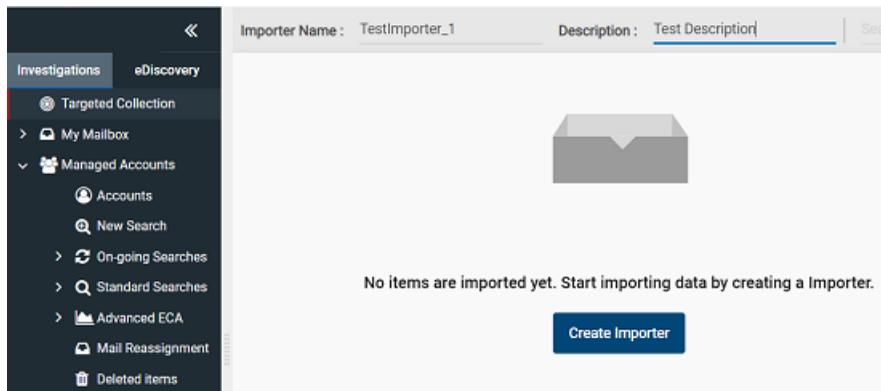
The **Select Collector Type** pop up appears as shown in the sample image below:



**3** Select **Import**, and specify the following details:.

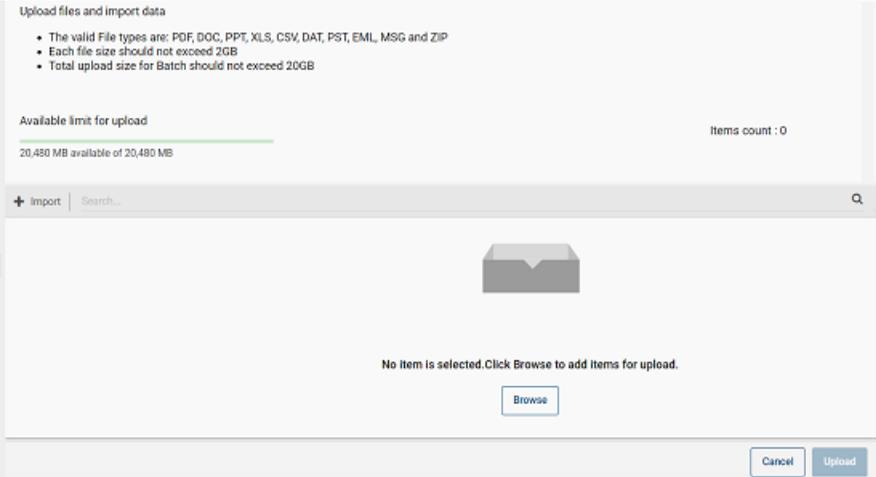
Importer Name                      Enter a unique name for the importer. This is a mandatory field.

Description                         Provide the description (purpose) for the importer. This is an optional field.

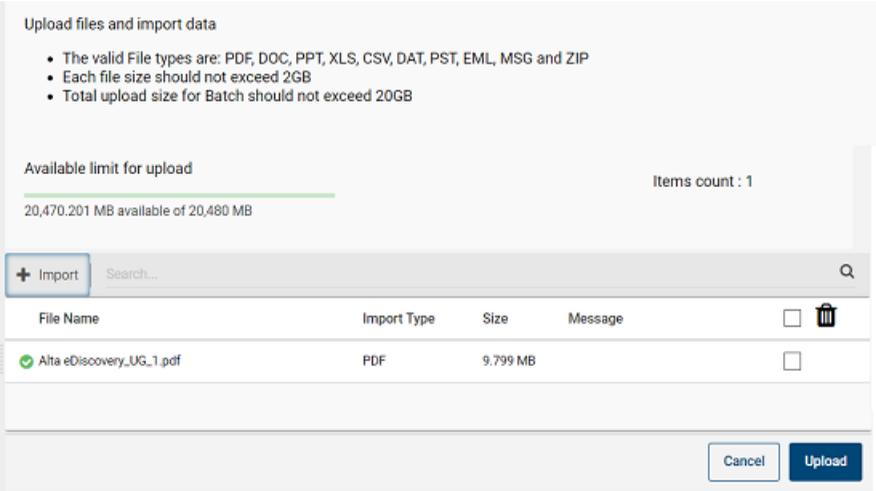


**4** Click **Create Importer**.

5 On the **Upload files and import data** page, Click **Import** or **Browse** to add files that you want to upload.



The selected files are listed with corresponding details. To remove files from this list, select the check box in the file details row, and click the **Delete** icon.



- 6 Click **Upload**. Do not refresh the screen while uploading is in progress.

The file upload status is displayed after uploading is completed. If you have uploaded several files, use the page navigation bar to view the files. Refer to the following sample screen.

File Name	Import Type	ID	Status	File Size	Uploaded On
Creating cases.pdf	PDF	73	import complete	0.219 MB	Dec 5, 2022, 7:01:00 PM

Items per page: 5 | 1 - 1 of 1

- 7 Click the **Targeted Collection** node to view the import details report.
- 8 After successful data uploading, the importer appears on the **Targeted Collections** page.

**Note:** If the status of the importer is **Archived**, you can expand the importer row to view the **Collection Defensibility Report** of the importer-specific data. It displays the details like Items Collected, Items Received, Items Archived, Items Duplicate, Items Rejected, and Items Failed. To download the **Collection Defensibility Report**, click the **Download** icon. See the sample image below:

Collection name	Collection date	Collector type	Status	Case sent
TestImporter_1	Dec 2 2022 12:08:44 AM	File Import	Incomplete	
<b>Collection Defensibility Report</b>				
Items Collected: 0	Items Archived: 0	Items Rejected: 0		
Items Received: 0	Items Duplicate: 0	Items Failed: 0		

The collection defensibility report consists two sections: **File Details** and **EML Details**.

The **File Details** sections provides details of ZIP, PDF, DOC, DOCX, PPT, PPTX, XLS, XLSX, CSV, and DAT files. The **EML Details** sections provides details of loose PST, EML, and MSG files.

## Creating collection sets from archived targeted collector

### To create a collection set from archived targeted collector

- 1 On the **Investigations** tab, select **Targeted Collection**.
- 2 Search for and select the Collection Name with the *Archived* status.
- 3 Expand the Collection Name to view the collection details.
- 4 Click **Send to Case** link from the same row.
- 5 In the **Send to Cases** dialog box, specify the following:

Send to existing case

If you want to send the search result to a specific case, select this check box.

If you have selected this option, the application displays the list of available cases. Search for and select the cases to which you want to send the search result.

Use the navigation options to view cases available on the next and previous pages.

Collection set name

Enter the collection set name.

When you select a case in the **eDiscovery** tab, the node of this name is displayed under the **Case Documents** node.

**Note:** After sending a collection set to the selected case, it is recommended to wait for some time for indexing items of this collection set under the **Case Documents** node. until the indexing is not complete, you may view the partial results. Once the indexing is complete, all the items will be available.

- 6 Click **Confirm**.

## About Managed Accounts

On the **Investigations** tab, the **Managed Accounts** node is available to those users with **Administrator** or **Reviewer** role privileges. The accounts to which you are assigned are listed when you select the **Accounts** sub-node. You can use the features available from the **Managed Accounts** node to conduct initial, probative, or ad hoc investigations, outside of the legal discovery workflow. When you are ready to conduct searches and reviews on a specific subject, you can create a case in the **eDiscovery** tab to track these searches.

# About Searches in investigation

This section describes the tasks related to searches during investigation.

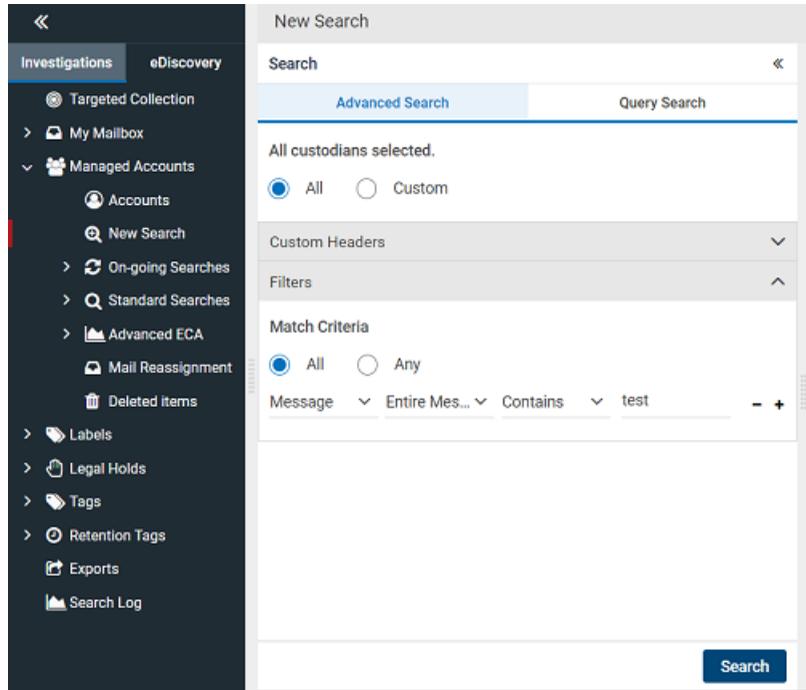
## Creating a new search

You can search the content of archive accounts from the **Investigations** tab, using Advanced Search and Query Search.

### To create a new search

- 1 Select the **Investigations** tab, and then select the node where you want to perform the new search:
  - To search your own mailbox, select **My Mailbox > Mailbox**, or select **My Mailbox > New Search**.
  - To search one or more of your managed accounts, select **Managed Accounts > New Search**.
  - To search a single managed account, select **Managed Accounts > Accounts**, and click the required account.

The following figure shows a sample **Search** pane:



2 To perform advanced search, specify the following inputs in the **Advanced Search** tab.

**Custodians**

- Select **All** to search archives of all of the custodians that are associated with the case.
- Select **Custom** to search archives of the particular custodians. The **Manage** button appears. Click **Manage** to open the **Add/Remove Custodians**. Expand **Selected Custodians** to view the custodians selected for this search. Expand **Manage Custodians** and select the custodians required for this search. Click **Update** to add these selected custodians as a search input. These custodians are listed under the **Selected Custodians** section.

**Custom Headers**

**Note:** The **Custom Headers** option does not appear if there is no entry for a custom header for a particular group or tenant in database. Custom header does not work independently. You need to use the filter criteria to search the required items.

Expand **Custom Headers** and set the header operator values.

- Click + to add new search clauses.
- Click - to remove search clauses that are not required.
- In the first column, select the required header you want to search for. Based on the data type you have selected, the operator changes. For example, if you have selected the receiver date in header, the operator values can be *Between*, *Before inclusive* and *After inclusive*. For a numeric or integer header value, the operator values can be *Is equal to*, *Less than*, and *Greater than*. If you have selected a string value in header, then the operator will be *Contains*.
- In the second column, select the available operator.
- In the third column, specify the text, phrase, or date that you want to search for.

**Filters**

Expand **Filters** and set the filter operator values. The operators are explained in a table below.

- Select **All** to match all conditions you have provided.
- Select **Any** to match any of the conditions you have provided.
- Click + to add new search clauses, and complete a new row for each clause.
- Click - to remove search clauses that are not required.
- Searches are not case-sensitive. The search supports phrase search, Boolean operators, proximity search, and wildcard search. See "[Search syntax for Advanced Search](#)" on page 318.

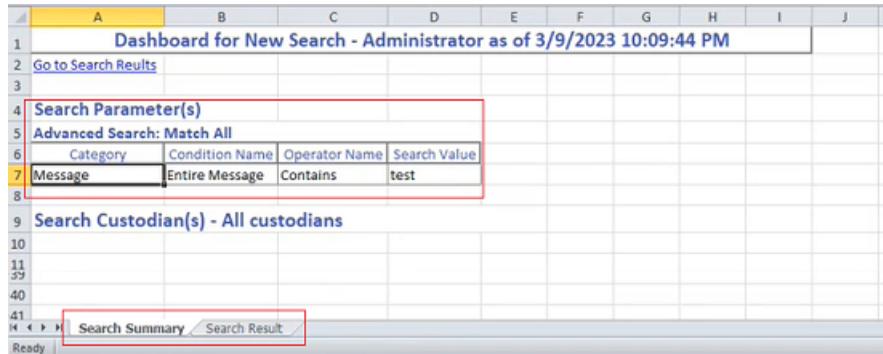
The **Filter** operators are listed below:

<b>Message</b>	Entire Message	Contains / Doesn't Contain
	Subject + Body	Contains / Doesn't Contain
	Subject	Contains / Doesn't Contain
	Body	Contains / Doesn't Contain
	Inbound Message (AND)	Yes / No
	Outbound Message (AND)	Yes / No
	Is Hidden	Yes / No
	IP Header	Contains / Doesn't Contain
	<b>Date Sent/Modified(AND)</b>	Is Equal To
Before		Select a date
After		Select a date
Within Range		Select a date range
<b>Participants</b>		All Senders and Recipients
	Senders Only	Contains / Doesn't Contain
	Recipients Only	Contains / Doesn't Contain
	To/Cc	Contains / Doesn't Contain
	To	Contains / Doesn't Contain
	Bcc	Contains / Doesn't Contain

<b>Classification</b>	Classified As	Contains / Doesn't Contain  <b>Note:</b> This option is available if the Veritas Alta Classification service is enabled for your company.  Select a classification tag from the drop-down list. The list shows all the classification tags that have been applied to your company's messages in Veritas Alta Archiving.  To see a tooltip with a classification tag's description, select the classification tag from the drop-down list and then point to the classification tag.
	Sentiment Score	Is Equal To / Below (Inc.) / Above (Inc.)
<b>Attachment</b>	Has Attachment	Yes / No
	File/Attachment Name	Contains / Doesn't Contain
	File Attachment Type	Contains / Doesn't Contain  See <a href="#">"Searchable attachment types"</a> on page 326.

**Important!**

- In Advanced Search, the search text input functionality is updated. In previous releases, when users were providing multiple text input with space, the default logical operator "AND" was getting applied. From now onwards, the default logical operator "OR" is getting applied to get user records. This operator change from "AND" to "OR" is applied to all kind of searches. If users have previously used spaces while providing the search text inputs, their saved records (saved searches/standard searches/Ongoing searches) will be impacted as the operator is changed from "AND" to "OR".
- Based on the selected attributes, when you export the search report, the **Search Summary** and **Search Report** is generated as shown in the sample image below.



3 To perform query search, specify the following inputs in the **Query Search** tab.

---

**Note:** Use the scroll bar to view the lengthy queries.

---

**Custodians**

- Select **All** to search archives of all of the custodians that are associated with the case.
- Select **Custom** to search archives of the particular custodians. The **Manage** button appears. Click **Manage** to open the **Add/Remove Custodians**.  
 Expand **Selected Custodians** to view the custodians selected for this search.  
 Expand **Manage Custodians** and select the custodians required for this search.  
 Click **Update** to add these selected custodians as a search input. These custodians are listed under the **Selected Custodians** section.

**Query Search**

Specify the query.

While specifying the query, you must mention the search criterion before the query text. Use a colon (:) between the search criterion and the query text.

The sample query looks like:

**<search term/criterion>:<samplequerytext>**

For example,

**Entiremessage:samplequerytext1**

To perform a query search for multiple query text at a time, either use no field (same as \_All) or use the AND/OR operators to separate the query terms (keywords).

For example,

**\_ALL:(samplequerytext1) OR \_ALL:(samplequerytext2)**

**\_ALL:(test) AND \_ALL:(test2)**

You can also use the NOT operator before the search criterion.

For example,

**NOT \_ALL:(samplequerytext1) OR NOT \_ALL:(samplequerytext2)**

For more search terms, See [“Search examples and tips”](#) on page 330.

**Note:** Refer to the table below, which explains the essential conditions for specifying queries.

**Guidelines for specifying queries**

The application supports query searches only if the following necessary conditions are followed. Else, the application displays corresponding errors.

**Conditions**

**Examples**

**Operator-specific conditions**

The search criteria must be used after the operator and before the query text.

**Correct**

subject:hi OR attachments:test

**Incorrect**

subject:hi OR test

<b>Conditions</b>	<b>Examples</b>
The AND/OR/NOT operators must be written in capital letters.	<p><b>Correct</b>  subject:text1 AND textbody:text2 OR attflag:true</p> <p><b>Incorrect</b>  subject:text1 and textbody:text2 or attflag:true</p>
The AND/OR logical operator is missing.	<p><b>Correct</b>  EntireMessage:test AND NOT Entiremessage:hi</p> <p><b>Incorrect</b>  EntireMessage:test NOT Entiremessage:hi</p>
<b>Spaces-specific conditions</b>	
The extra space(s) between operators is not allowed.	<p><b>Correct</b>  (NOT subject: test AND NOT textbody :test)</p>
The space after bracket is not allowed.	<p><b>Correct</b>  (NOT subject: text1)</p> <p><b>Incorrect</b>  ( NOT subject: text1)</p>
The space before colon is not allowed.	<p><b>Correct</b>  (NOT subject: test AND NOT textbody:test)</p> <p><b>Incorrect</b>  (NOT subject : test AND NOT textbody :test)</p>

**4** Click **Search**.

**5** Click **Save Search**.

See [“Saving searches in Review sets and Research sets”](#) on page 197.

## Saving searches as on-going and standard searches

If you have the required permissions you can save an Advanced Search or a Query Search. The roles that can create the on-going and the standard searches from the **Investigations** tab are as follows:

- **My Mailbox** node: All users.
- **Managed Accounts** node: Administrators and reviewers with the appropriate permissions.

The Advanced or the Query Search that is performed from the **Investigations** tab can be saved as a Standard Search or an On-going Search:

- A **Standard Search** retains the results that were captured when the search was created.
- With an **On-going Search**, any new items that meet the search criteria continue to be added after the search is created.

**To save a search as on-going or standard search**

- 1 Perform an Advanced Search or a Query Search in the **Investigations** tab.  
 See [“Creating a new search”](#) on page 60.
- 2 Click **Save Search**.
- 3 Complete the information in the **Save Search** dialog. The following table describes the options.

<b>Enter Saved Search Name</b>	Enter a name for the saved search. This name is also the default tag name, if you select the <b>On-going</b> check box.
<b>On-going</b>	Select to make the saved search an On-going Search.  If you do not check this check box, Alta eDiscovery saves the search as a Standard Search.  After you select the <b>On-going</b> check box, the application disables the <b>Advanced ECA</b> check box.
<b>Tag Name</b>	This option is available only if the <b>On-going</b> check box is selected.  Specify the name of a custom tag to assign to the associated items. By default Alta eDiscovery uses the saved search name as the tag name.
<b>Legal hold</b>	This option is available only if the <b>On-going</b> check box is selected.  Select to place all item in the saved search on legal hold. Emails on legal hold are not deleted from the archive.
<b>Send to Case</b>	You have an option to select this check box. In case the Search is an Ongoing search, then the Keep copy in investigation check box is selected and disabled by default. In addition, a Case needs to be selected from the Cases drop-down. This check box allows you to send along with keeping a copy in investigation to the eDiscovery Tab. This preserves chain of custody by recreating the search in eDiscovery. The case gets moved to the eDiscovery > Research Set.

- 4 Click **OK** to save the search as follows:

- If you have selected the **On-going** check box, the search is saved under **On-going Searches**.
- Otherwise the search is saved under **Standard Searches**.

If you have selected the **Send to Case** check box, accordingly the case gets moved to the eDiscovery > Research Set. A copy is created in the On-going/Standard searches, if the **Keep copy in investigation** check box is selected or not.

## Updating on-going and standard searches

You can update the on-going and the standard searches from the **Mailbox** and the **Managed Accounts** nodes.

### Updating on-going and standard searches from Mailbox

You can update the on-going and the standard searches to change the search name, to specify the new tag name, and to apply a legal hold on a searches. While updating the searches from the **My Mailbox** node, you cannot send the on-going and the standard searches to the cases available in the eDiscovery tab.

**To update an on-going or a standard search from your mailbox**

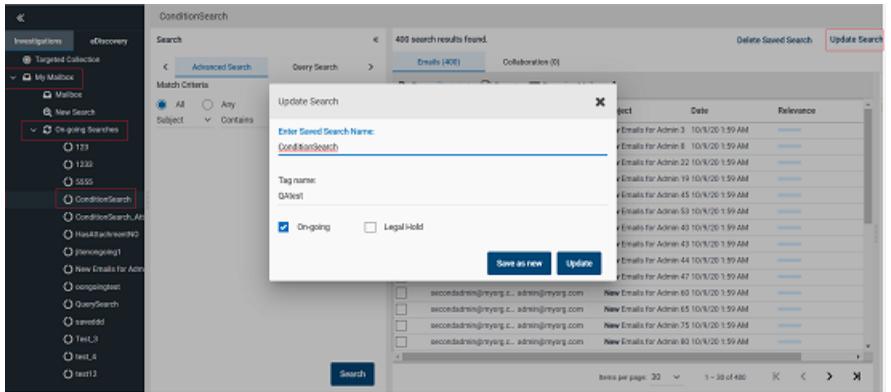
- 1** On the **Investigations** tab, select **My Mailbox > On-going Searches** or **Standard Searches** as required.

**2 To update the on-going search**, select an on-going search, and click **Update Search**.

Update the following information in the **Update Search** dialog box as required.

<b>Enter Saved Search Name</b>	Change the name for the saved search if required.
<b>Tag Name</b>	You can modify the option only if the <b>On-going</b> check box is selected.  Specify a new tag name. By default Alta eDiscovery uses the saved search name.
<b>On-going</b>	Ensure that this check box is selected so that you can view this search under the on-going search list.  For an on-going search, new items that meet the search criteria continue to be added after the search is created.
<b>Legal hold</b>	This option is available only if the <b>On-going</b> check box is selected.  Select to place all items in this on-going search on legal hold. Emails on legal hold are not deleted from the archive.
<b>Save as new</b>	Click <b>Save as new</b> to save the selected on-going search as a new search. The original saved search remains unchanged.

The application displays the following sample dialog box.

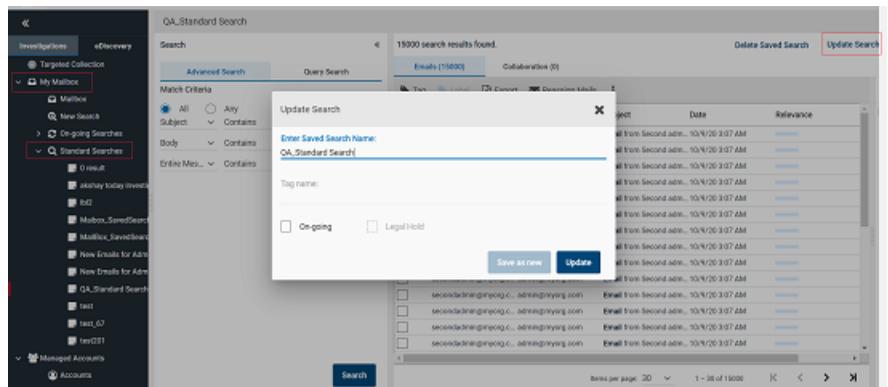


**3 To update the standard search, select a standard search, and click **Update Search**.**

Update the following information in the **Update Search** dialog box as required.

- Enter Saved Search Name** Change the name for the standard search if required.
- Tag Name** You cannot change the Tag Name while updating the standard search. You can modify the option only if the **On-going** check box is selected.
- On-going** Ensure that this check box is not selected. You can select this check box only if you want to save this search as an on-going search.
- Legal hold** You cannot change this option while updating the standard search. You can modify this option only if the **On-going** check box is selected.
- Save as new** You cannot save the existing standard searches as a new standard search. This option remains disabled in case of updating the standard searches.

The application displays the following sample dialog box.



**4 Click **Update** to save this updated search.**

- When the **On-going** check box is selected, the search is saved under the **On-going Searches** node.
- Otherwise the search is saved under the **Standard Searches** node.

## **Updating an on-going or a standard search from Managed Accounts**

You can update the on-going and the standard searches to change the search name, to specify the new tag name, and to apply a legal hold on a searches. While updating the searches from the **Managed Accounts** node, you can send the on-going and the standard searches to the cases available in the eDiscovery tab.

### **To update an on-going or a standard search from Managed Accounts**

- 1** On the **Investigations** tab, select **Managed Accounts**.
- 2** Expand the **On-going Searches** node or the **Standard Searches** node, as required.

**3 To update the on-going search, select an on-going search, and click **Update Search**.**

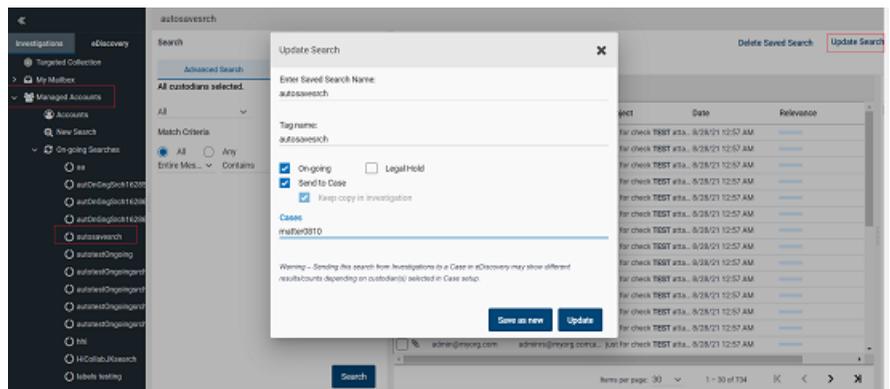
Update the following information in the **Update Search** dialog box as required.

<b>Enter Saved Search Name</b>	Change the name for the on-going search if required.
<b>Tag Name</b>	You can modify the option only if the <b>On-going</b> check box is selected.  Specify a new tag name. By default Alta eDiscovery uses the saved search name.
<b>On-going</b>	Ensure that this check box is selected so that you can view this search under the on-going search list.  For an on-going search, new items that meet the search criteria continue to be added after the search is created.
<b>Legal hold</b>	This option is available only if the <b>On-going</b> check box is selected.  Select to place all items in this on-going search on legal hold. Emails on legal hold are not deleted from the archive.
<b>Save as new</b>	Click <b>Save as new</b> to save the selected on-going search as a new search. The original saved search remains unchanged.

### Send to Case

You have an option to select this check box. In case the Search is an on-going search, then the **Keep copy in investigation** check box is selected, but displayed as disabled by default. In addition, a Case needs to be selected from the Cases drop-down. This check box allows you to send along with keeping a copy in investigation to the eDiscovery Tab. This preserves chain of custody by recreating the search in eDiscovery. The case gets moved to the eDiscovery > Research Set.

The application displays the following sample dialog box.



**4 To update the standard search, select a standard search, and click **Update Search**.**

Update the following information in the **Update Search** dialog box as required.

<b>Enter Saved Search Name</b>	Change the name for the standard search if required.
<b>Tag Name</b>	You cannot change the Tag Name while updating the standard search. You can modify the option only if the <b>On-going</b> check box is selected. If you select the <b>On-going</b> check box, this standard search will be saved as the <b>On-going</b> search.
<b>On-going</b>	Select this option if you want to save the selected standard search as the on-going search. In this case, you can update the tag name and apply a legal hold to the items within the search.  After you select this check box, the <b>Advanced ECA</b> option gets disabled.
<b>Legal hold</b>	You cannot change this option while updating the standard search. You can modify this option only if the <b>On-going</b> check box is selected.
<b>Advanced ECA</b>	Select this option if you want to move (save) the selected standard search under the <b>Advanced ECA</b> node.  After you select this check box, the <b>On-going</b> and the <b>Legal Hold</b> options get disabled.

**Send to Case**

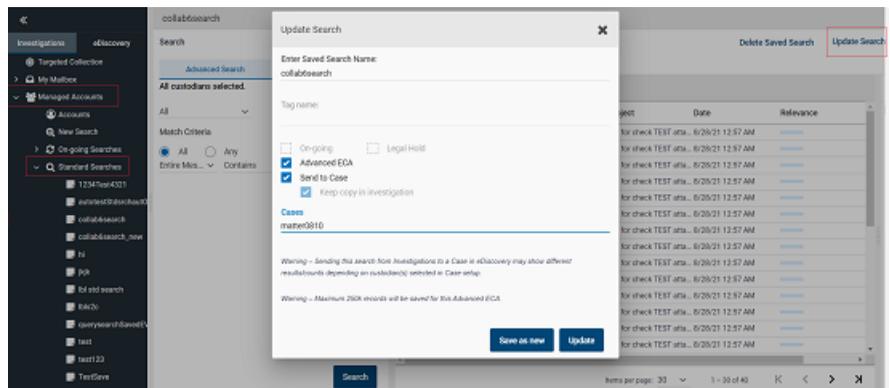
Select this check box if you want to send the selected standard search to the required cases on the eDiscovery tab.

Select the case from the **Cases** drop-down. This check box allows you to send the selected search, along with keeping a copy in investigation, to the eDiscovery Tab. This preserves chain of custody by recreating the search in eDiscovery. The case gets moved to the eDiscovery > Research Set.

**Save as new**

You cannot save the existing standard searches as a new standard search. This option remains disabled in case of updating the standard searches.

The application displays the following sample dialog box.



- 5 Click **Update** to save this updated search.

## Exporting a summary report of searched items

In **Investigations**, any user who has access to searches can export the printable reports of emails. You can export all emails and a searched emails summary as a zip file for further use.

It is important to understand the difference between exporting reports and exporting item records. When you generate and export reports, the metadata displayed on the details pane is shown in the excel file. However, when you export items, the actual item files are downloaded.

#### To export a report of searched items

- 1 In the **Investigations** pane, expand **My Mailbox** or **Managed Accounts**.
- 2 Search for and select any new search, on-going search, or standard search for which you want to export a report.

---

**Note:** In the **Advanced Search** tab, you can refine your criteria to search for records. Click the plus icon to add new criteria. Click the minus icon to remove the corresponding criteria. Select **Match All** to find records that meet all specified criteria. Select **Match Any** to find at least one specified criterion.

---

- 3 To export emails, click **Export**, and then do any of the following:
  - To export and print records on the current page, click the **Export** icon, and select **Export current page**.
  - To export and print selected records, select the records, click the **Export** icon, and select **Export selected emails**.
  - To export and print all records, click the **Export** icon, and select **Export all emails**.
- 4 To export the searched email summary, click the **More Options** icon, and select **Export Report**.

Application downloads the zipped report to your **Downloads** folder. You can extract, save, and share this excel report with the concerned persons. This report specifies the date and time when the report is generated. It can contain a maximum of 100 Thousand records in a single file. If numbers of records exceeds 100 Thousand, application generates multiple files and downloads reports as a single zipped folder.

## Deleting searches

You can delete a single search at a time.

#### To delete a saved search (Investigations tab)

- 1 On the **Investigations** tab, do any of the following:
  - Expand **My Mailbox** to select search from the **On-going searches** or the **Standard searches** node.

- Expand **Managed Accounts** to select search from the **On-going searches**, **Standard searches**, or the **Advanced ECA** node.
- 2 Search for and select the Search you want to delete.  
The right-hand pane displays emails, collaboration messages, and files included in the search result.
  - 3 Click **Delete Saved Search**.  
The application prompts you to confirm that you want to perform the operation.
  - 4 Click **Yes** to complete the operation or click **No** to cancel it.

## Working with searched emails

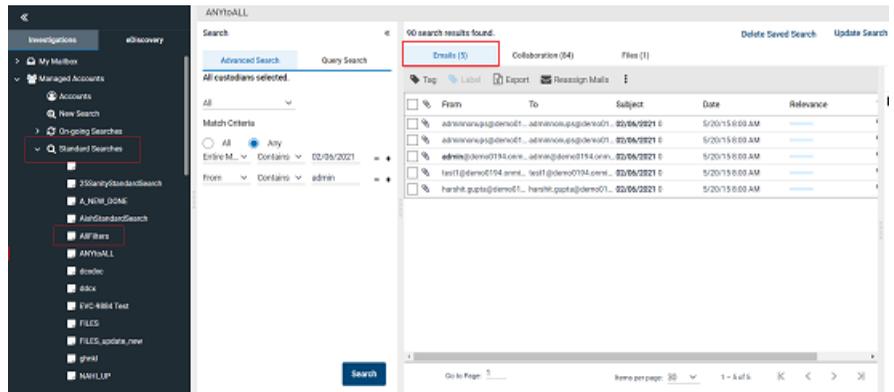
This section describes the tasks that a user can perform with the searched emails.

### Applying tags and legal hold to emails

#### To apply tags and legal hold to emails

- 1 On the **Investigations** tab, navigate to any of the following locations, as required:
  - **Managed Accounts > New Search**.
  - **Managed Accounts > On-going Searches**.
  - **Managed Accounts > Standard Searches**.
- 2 Create a new search or select the existing search in which you want to tag the items.  
The application displays the searched items in the right pane.

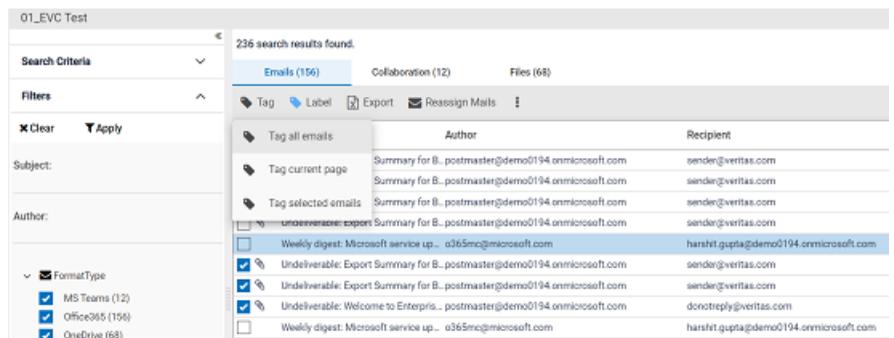
- 3 Set the filter options and click **Apply** to view the filtered items.



- 4 In the right pane, on the **Emails** tab, select one or more emails to which you want to apply tags.

**Note:** Before you apply tags to the items, you can view the previously applied tags of the items in the preview pane. However, you need to select only one item at a time to view the tags. In the following sample image, you can see the previously applied tags and retention tags to the email in the **Emails** tab.

- 5 On the action menu, click **Tag**, and do any of the following as required.
  - To tag all the items in the search, click **Tag all emails**.
  - To tag all the items in the current page, click **Tag current page**.
  - To tag only the selected items, click **Tag selected emails**.



**6** In the **Add Tag** dialog box, do the following:

Tag Name	Enter a new unique tag name.
Comments	Provide a comment or a description for the tag name.
Legal Hold	Select this check box if you want to apply the legal hold on the emails.
Select retention Tag	<p>Instead of applying a new tag, you can apply the retention tags that are created in Veritas Alta Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply.</p> <p>After you select this option, the application disables the <b>Tag Name</b> field.</p>

**7** Click **Tag**.

After you apply tags to the emails, these tagged emails are available under the respective tags under the **Tags** node.

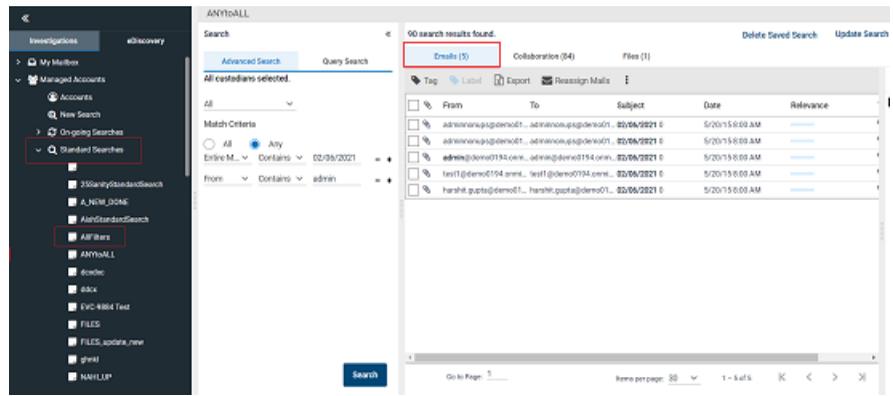
## Applying labels to emails

To help organize your work you can apply labels to the emails. Labels are applied to emails typically to mark them as exempt from the review process.

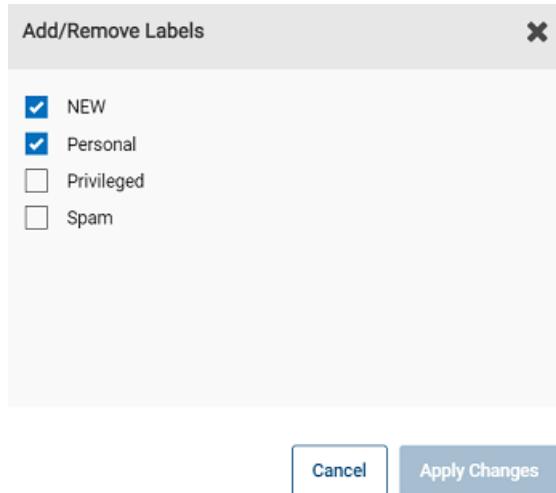
### To apply a label to emails

- 1 On the **Investigations** tab, create a new search or select the searches from the On-going searches or Standard searches node.
- 2 Perform advanced search or query search to get the expected items. See [“Performing Advanced Search and Query Search”](#) on page 312.

The application displays result as shown in the following sample image.



- 3 On the **Emails** tab, select the check box for one or more emails to which you want to apply labels.
- 4 On the action menu, click **Label**.
- 5 In the **Add/Remove Labels** dialog box, select the labels you want to apply to the emails.



You can clear the labels if these are not required anymore. In case you have selected multiple emails, the **Add/Remove Labels** dialog box shows applied level status as follows:

- The check box that is not selected yet means this label is not at all applied to the selected emails.
- The check box with the dash mark means the label is applied to some of the selected emails, but not applied to all the selected emails.
- The check box with the tick mark means the label is applied to all the selected emails.

**6** Select the required labels, and click **Apply Changes**.

After you apply labels to the emails, these labeled emails are available under the respective labels under the **Labels** node.

**7** To ensure if the label is applied to the email, select the email to view its details in the right pane, and expand **Labels**.

You can click any label in the **Labels** popup to navigate to the respective label under the **Labels** node. See the sample image below

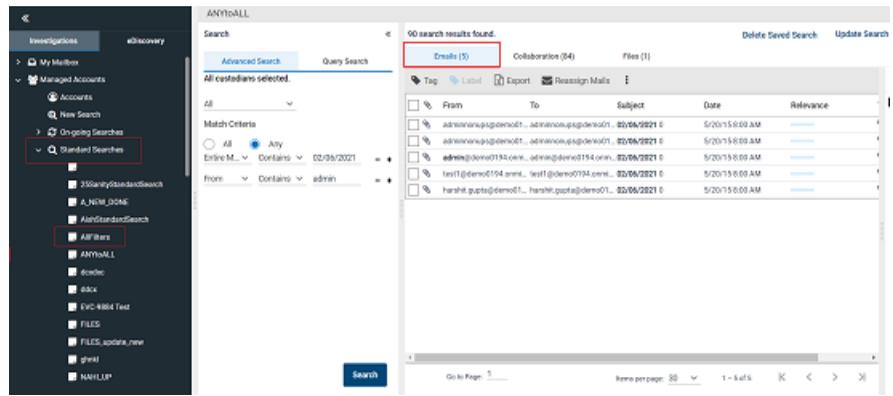
## Exporting searched emails

You can export a batch of emails and share it with the concerned authority for the intended use. To secure the information, you can use the AES-256 encryption while creating a batch of emails for export. After exporting the batch of emails, you can download and share it with others.

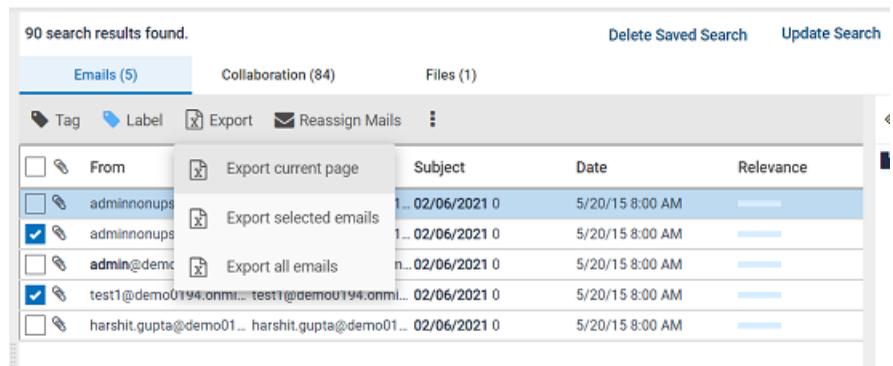
### To export a batch of emails

- 1 On the **Investigations** tab, create a new search or select the searches from the On-going searches or Standard searches node.
- 2 Perform advanced search or query search to get the expected items. See [“Performing Advanced Search and Query Search”](#) on page 312.

The application displays result as shown in the following sample image.



- 3 On the **Emails** tab, select the check box for one or more emails, and click **Export**. Do any of the following:
  - Click **Export current page** export emails that are available on the current page.
  - Click **Export selected emails** to export only the selected emails.
  - Click **Export all emails** to export all the available emails within the search.



4 In the **Export Options** dialog box, do the following:

**Export Options** ✕

You have selected 2 items of approximately 7 KB size to download.  
Please select additional export options:

**Message Format** PST ▾

**Include Journaling Envelope**

**Enable AES-256 Encryption**

**Export Name** emails

**Export Password** \_\_\_\_\_

**Confirm Password** \_\_\_\_\_

**Share Export** Select Admin(s) ▾

Your download will be available as a single or multiple file segments.

Cancel Export

**Message Format**

Select the appropriate message format. By default, the PST format is selected. The available message formats are:

- Clearwell
- EML
- EML with EDRM
- PST with EDRM
- MSG with EDRM
- FTI-RingTail
- EDRM Only
- PST
- OriginalEDRM

If you select this option, the exported file includes emails in both MSG and EML formats, allowing you to work with the emails in the format that best suits your needs. Besides this, the exported file includes additional files, namely - *edrmXML.xml* and *HTMLReport.html* in their original formats. These files facilitates a smooth transfer of electronically stored information (ESI) between different software programs during the electronic discovery process.

- Original

If you select this option, the exported file includes emails in both MSG and EML formats, allowing you to work with the emails in the format that best suits your needs.

**Note:** The *OriginalEDRM* and *Original* message formats are available to the users that are listed in the

**Configuration\_Overriden** table in the Veritas Alta Archiving database. If you want to avail these options in the **Message Format** drop-down field, contact Veritas support.

**Include Journaling Envelope**

Select this option to include journaling envelopes, which contain information about email recipients such as distribution lists.

**Enable AES-256 Encryption**

Select this check-box if you want to secure the access of the downloaded export batch.

**Export Name**

Provide the name for the batch you want to export. By default, it takes the Search Name. You can change it if required.

**Export Password**

Enter the password that you want end user to provide when they access this exported batch of emails.

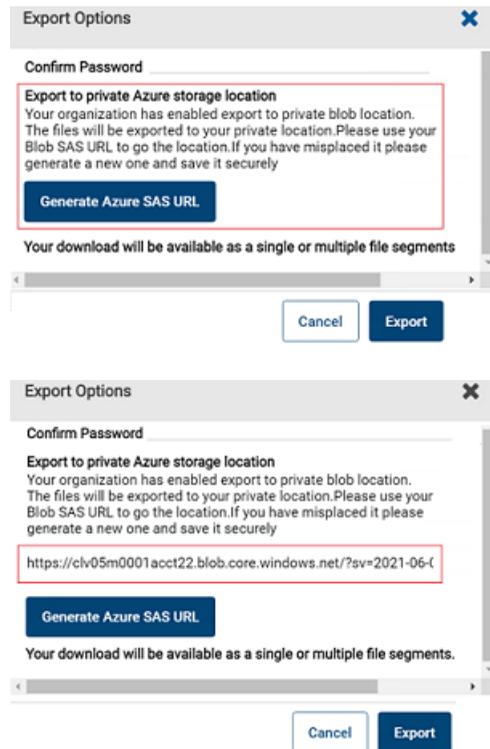
**Confirm Password**

Repeat the same password for confirmation.

**Generate Azure SAS URL**

**Note:** Users can see this button only if the **Export to Azure private storage location** feature in the Veritas Alta View Compliance and Governance Management Console is enabled for them. Users can export items to their private Azure Blob storage location.

Click **Generate Azure SAS URL** to get the Azure Blob SAS URL to access the location and save it for future use.



For security reasons, the application does not show this URL the next time. However, if the SAS URL is misplaced for any reason, click **Generate Azure SAS URL** again to generate a new SAS URL and save it securely.

After you click **Export** on the **Export Options** dialog box, all the selected items are exported to the Azure private storage location. You can use Microsoft Storage Explorer to access the exported items.

### Share Export

Click **Select Admin** to choose the recipients of this batch export and click **Update**.

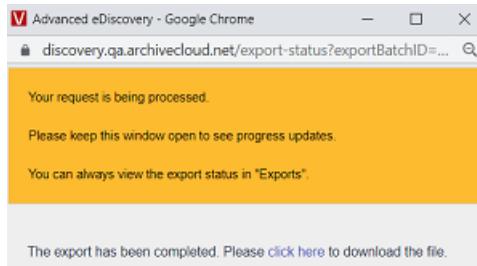
**Note:** You need to manually share the Export Password with the administrators and follow all the security specific rules of the organization.

## 5 Click **Export**.

---

**Note:** The exported batch can either gets downloaded as a single or multiple file segments.

---



## 6 Click **Click here** to download the exported batch of emails.

The

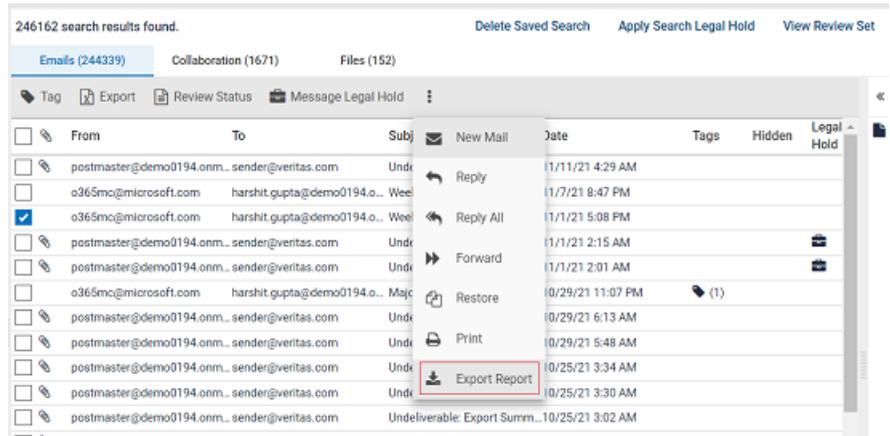
## 7 To confirm the status of batch export, on the **Investigations** tab, select **Exports**.

## Exporting a search summary report for emails

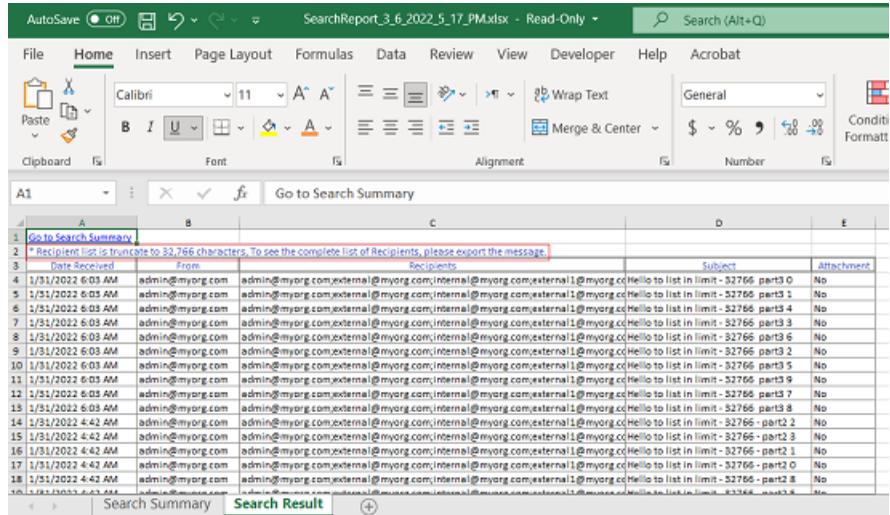
### To export a search summary report for emails

- 1 On the **Investigation** tab, select the search for which you want to export a summary report.
- 2 Click **New Search** to create a new search. Else, expand **On-going Searches** or **Standard Searches** to select existing search.

3 On the **Emails** tab, click the **More Actions** icon, and click **Export Report**.



The application downloads the summary report (.xlsx) of the emails within the search as a zipped (.zip) folder. A sample report is shown below. The report comprises of two sheets.



**Note:** The **Search Summary** sheet displays details such as Search Parameters and Custodians.

The **Search Result** sheet displays details such as Date Received, From, Recipients, Subject, and Attachments. The recipient column in this summary

report includes recipients mentioned in the To, CC, and BCC fields. If the list of recipients is longer than 32766 characters, the application truncates the list. The report displays a note that - *Recipient list is truncate to 32,766 characters, To see the complete list of Recipients, please export the message.* In such scenario, to view the complete list of recipients, you need to export the individual message.

---

## Reassigning emails

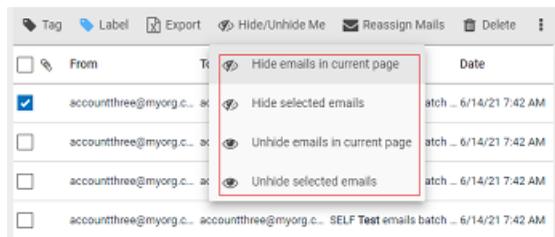
To understand email reassigning, See [“About Mail Reassignment”](#) on page 171.

## Hiding and un hiding emails

Administrators can use the Hide Me and the Unhide Me options to hide and unhide emails from users respectively. In Personal.cloud and Mobile Web Access, administrators cannot search the emails with the hidden state. However, in Alta eDiscovery, administrators can search and view these hidden emails.

### To hide emails

- 1 Under **Managed Accounts**, conduct a**New search**.
- 2 Perform advanced search or query search to get the expected items. See [“Performing Advanced Search and Query Search”](#) on page 312.
- 3 Select the emails that you want to hide.
- 4 Click **Hide/Unhide me**, and select an option to specify which emails to hide or unhide.



**5** Select the option to **Hide selected emails** or **Hide email in current page**.

The confirmation dialog box appears informing that action has been executed successfully, refresh search to see the output of this action.

---

**Note:** A maximum of 300 emails can be hidden in a single transaction.

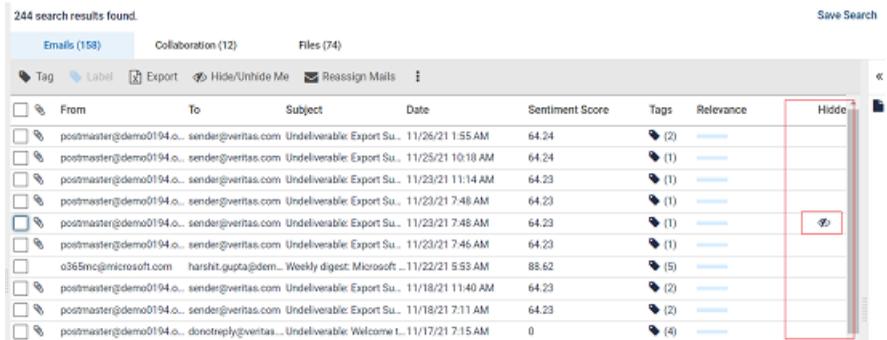
The Hide emails dialog box appears informing that the emails are hidden, and cannot be browsed by end-users. It may take up to 60 minutes to hide the emails from appearing in the end-user search results.

---

**6** Click **Yes**.

**7** Execute the same search again.

The hidden emails are marked with a gray background, and the **Hide** icon appears in the last column.



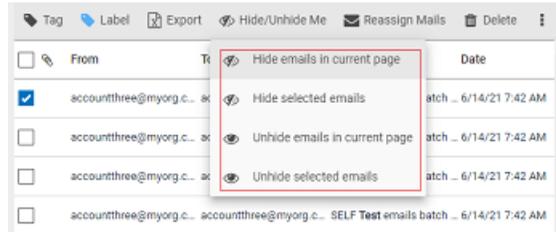
**To unhide emails**

**1** Under **Monitored Accounts**, conduct a **New search**.

**2** Perform advanced search or query search to get the expected items. See [“Performing Advanced Search and Query Search”](#) on page 312.

**3** Select the emails that you want to unhide.

- 4 Click the **Hide/Unhide me** icon, and select the emails that are hidden previously.



- 5 Select the option to **Unhide selected emails** or **Unhide email in current page**.

The confirmation dialog box appears informing that action has been executed successfully, refresh search to see the output of this action.

---

**Note:** A maximum of 300 emails can be unhidden in a single transaction.

The Unhide emails dialog box appears informing that the emails are unhidden, and cannot be browsed by end-users. It may take up to 60 minutes to unhide the emails from appearing in the end-user search results.

---

- 6 Click **Yes**.
- 7 Execute the same search again.

The unhidden emails are no longer marked with a gray background, and the **Hide me** icon disappears from the last column.

## Deleting emails permanently

Administrators can use the **Delete** option to permanently delete emails from users. In Personal.cloud and Mobile Web Access, administrators or users cannot search the emails that have been deleted.

---

**Note:** For information on how to enable **Privilege Delete** to company level, see *Configuring archive options* in the [Management Console Help](#).

For information on how to enable **Privilege Delete** to administrators, see *Editing the built-in administrator roles* in the [Management Console Help](#).

---

**To delete emails**

- 1 Under **Managed Accounts**, navigate to **New search**, and then conduct a search.
- 2 If required, select the check box for one or more emails.
- 3 Click the **Delete** icon, and then select an option to specify which emails to delete.

---

**Note:** A maximum of 300 emails can be deleted in a single transaction.

The Permanently delete emails dialog box appears informing that once emails are deleted, they cannot be recovered or accessed and that this is permanent and irreversible action. It may take up to 60 minutes for deleted emails to stop appearing in the end-user search results.

---

- 4 Click **Yes**.  
 The confirmation dialog box appears informing that action has been executed successfully.
- 5 To check the status of the deleted emails, navigate to **Deleted items** under **Managed Accounts**, and review the list of emails.

---

**Note:** A list shows the deleted emails in chronological order from most recent to older. You can sort by email Date or Date Added (default).

---

The status of the deleted email can be:

- **Deleted** – the email has been deleted.
- **Queued** – the email is queued to be deleted.
- **On Legal Hold** – the email is on legal hold status, and it cannot be deleted. The email on legal hold has Legal hold tag, Legal hold search, or Legal hold Custodian in a Case applied. To delete an email marked on legal hold, first, remove any applicable legal hold that has been previously applied .

## Working with searched collaboration messages

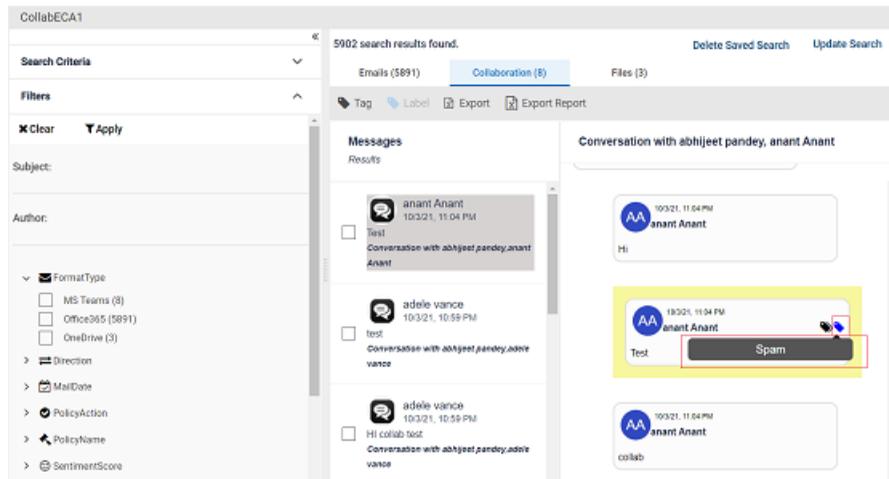
In Alta eDiscovery, you can collect the Microsoft Teams data. To view and review the Microsoft Teams specific communication, you can access the **Collaboration** tab after creating a search. This tab is visible only if -

- The Microsoft Teams service is enabled

- The Microsoft Teams collector is configured

After executing a search, the **Collaboration** tab displays Chats or Channel conversations that matches with the Search criteria applied in the left pane. As the icons of the Chats and the Channel conversations are different, you can easily distinguish between the Chat and Channel messages. You can download the images and the attachments used in the Chat and Channel conversations.

To get a full context of the conversation, you can view the events, reactions, and link previews in the messages. To easily distinguish among the participants in the conversation, the participant icons are highlighted in different color.



When you search a term or a text in a conversation, it is highlighted in a different color for easy identification.

## Searching collaboration messages during investigation

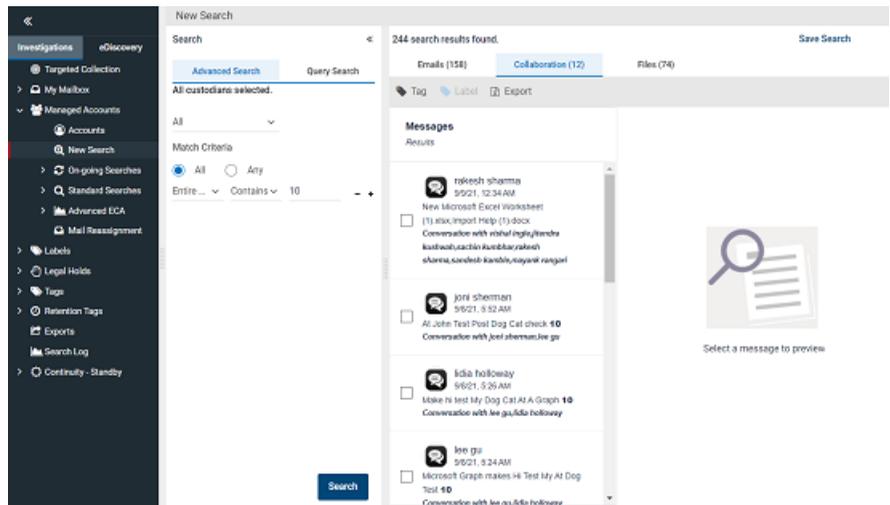
You can search and view the collaboration messages if the Microsoft Teams service is enabled and the archive collector is configured for you.

### To search collaboration messages during investigation

- 1 Select the **Investigations** tab, and then select the node where you want to perform the new search:
  - To search your own mailbox select **My Mailbox > Mailbox**, or select **My Mailbox > New Search**.
  - To search a single managed account, select **Managed Accounts > Accounts** and click the required account.

- To search one or more of your managed accounts select **Managed Accounts > New Search**.
- 2 Perform advanced search or query search to get the expected items. See [“Performing Advanced Search and Query Search”](#) on page 312.
- 3 Click **Search**.

The search result appears as shown in the following sample image.



- 4 Click **Save Search**.

See [“Saving searches in Review sets and Research sets”](#) on page 197.

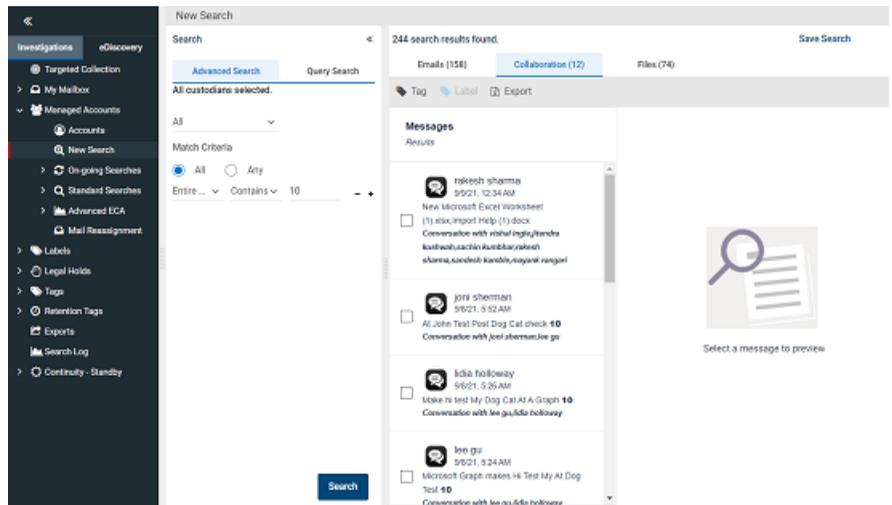
## Applying tags and legal hold to collaboration messages

To help organize your work you can tag emails with custom tags of your own choice, which are visible only to you. You can also tag messages with a Retention tags (also called as managed tags), if you have any of these available to you. Retention tags are created in the Veritas Alta View Compliance and Governance Management Console, under the **My Config > Managed Tags** node. For more information on managed tags, see the Archive Administration Help.

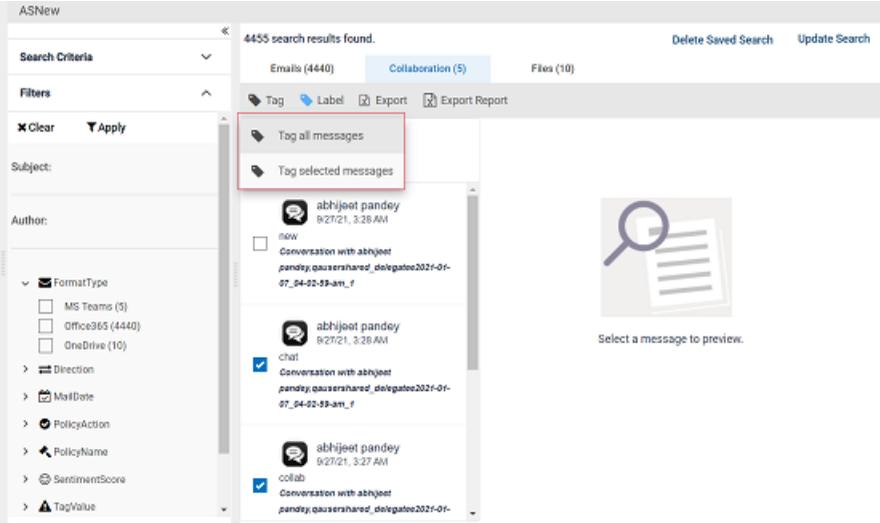
**To apply a tag and legal hold to collaboration messages**

- 1 On the **Investigations** tab, create a new search or select the searches from the On-going searches, Standard searches, or Advanced ECA nodes.
- 2 Perform advanced search or query search to get the expected items. See [“Performing Advanced Search and Query Search”](#) on page 312.

The application displays result as shown in the following sample image.



- 3 On the **Collaboration** tab, select the check box for one or more messages (chats) that you want to tag.
- 4 On the action menu, click **Tag**, and do any of the following as required.
  - To tag only the selected messages, click **Tag selected messages**.
  - To tag all the messages in the search, click **Tag all messages**.



5 In the **Add Tag** dialog box, do the following:

The screenshot shows the 'Add Tag' dialog box. It has a title bar with 'Add Tag' and a close button. The main area contains a 'Tag Name' field with a red asterisk and a placeholder 'Enter tag name'. Below it is a 'Comments' field. There is a 'Legal Hold' checkbox. At the bottom, there is a 'Select Retention Tag' section with a radio button selected and three checkboxes: 'JaTagtest', 'JitenTag', and 'newtag1'. At the very bottom are 'Cancel' and 'Tag' buttons.

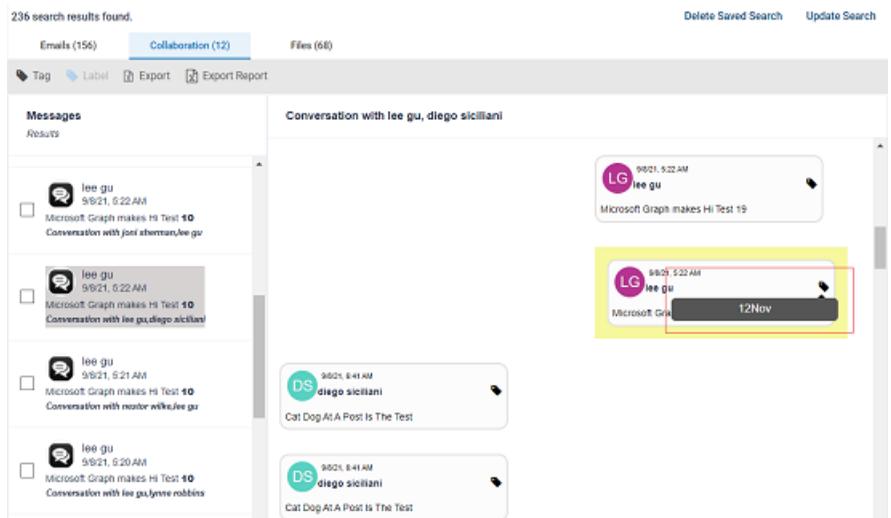
- |                      |  |
|----------------------|--|
| Tag Name             | Enter a new unique tag name.   |
| Comments             | Provide a comment or a description for the tag name.   |
| Legal Hold           | Select this check box if you want to apply the legal hold on the messages.   |
| Select retention Tag | Instead of applying a new tag, you can apply the retention tags that are created in Veritas Alta Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply. |

**6 Click Tag.**

After you apply tags to the collaboration messages, these tagged messages are available under the respective tags under the **Tags** node.

**7 To ensure if the tag is applied to the message, select the message to view its details in the right pane. Hover over the black Tag icon to view all the tags applied to this message.**

You can click the black Tag icon to view all the applied tags in the **Tags** popup. See the sample image to view all the applied tags.



You can click any tag in the **Tags** popup to navigate to the respective tag under the **Tags** node.

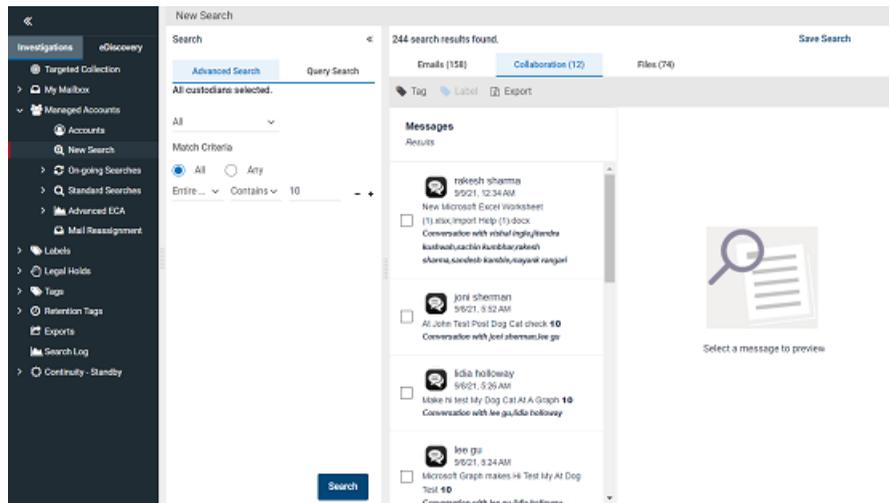
## Applying labels to collaboration messages

To help organize your work you can apply labels to the collaboration messages. Labels are applied to collaboration messages typically to mark them as exempt from the review process.

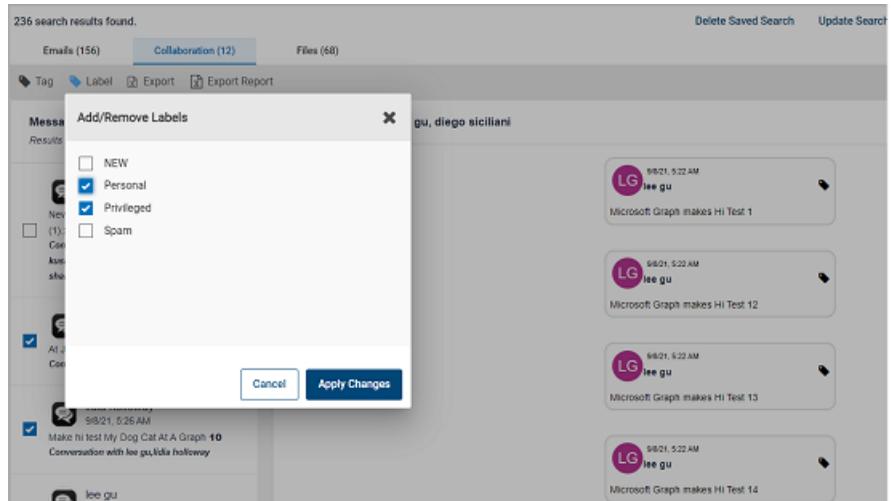
**To apply a label to collaboration messages**

- 1 On the **Investigations** tab, create a new search or select the searches from the On-going searches or Standard searches node.
- 2 Perform advanced search or query search to get the expected items. See [“Performing Advanced Search and Query Search”](#) on page 312.

The application displays result as shown in the following sample image.



- 3 On the **Collaboration** tab, select the check box for one or more messages (chats) to which you want to apply labels.
- 4 On the action menu, click **Label**.
- 5 In the **Add/Remove Labels** dialog box, select the labels you want to apply to the messages.



You can clear the labels if these are not required anymore. In case you have selected multiple collaboration messages, the **Add/Remove Labels** dialog box shows applied level status as follows:

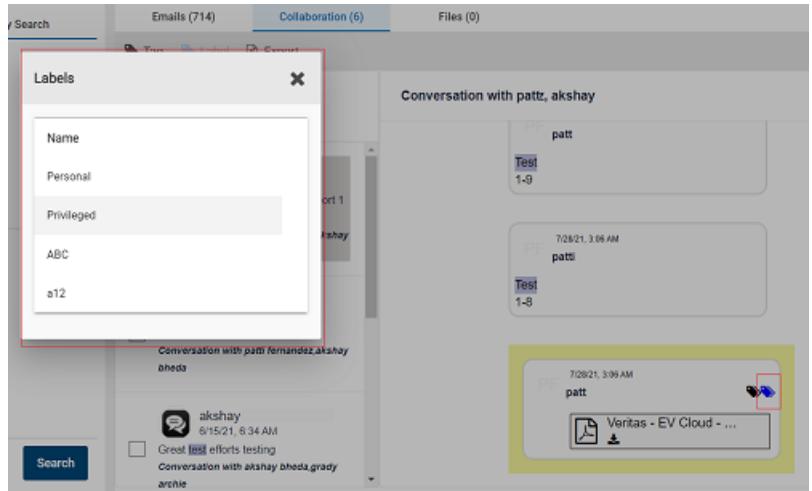
- The check box that is not selected yet means this label is not at all applied to the selected messages.
- The check box with the dash mark means the label is applied to some of the selected messages, but not applied to all the selected messages.
- The check box with the tick mark means the label is applied to all the selected messages.

**6** Select the required labels, and click **Apply Changes**.

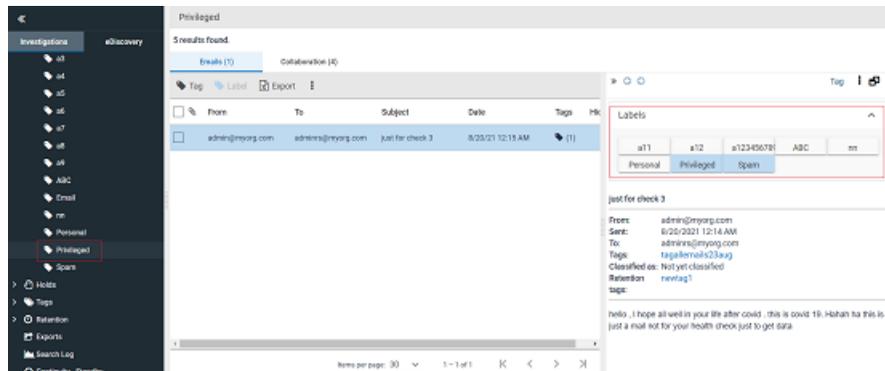
After you apply labels to the collaboration messages, these labeled messages are available under the respective labels under the **labels** node.

**7** To ensure if the label is applied to the message, select the message to view its details in the right pane. Hover over the blue Label icon to view all the labeled messages.

- To view all the applied labels in the **Labels** popup, click the blue-colored Label icon. See the sample image to view all the applied labels.



- You can click any label in the **Labels** popup to navigate to the respective label under the **Labels** node. See the sample image below



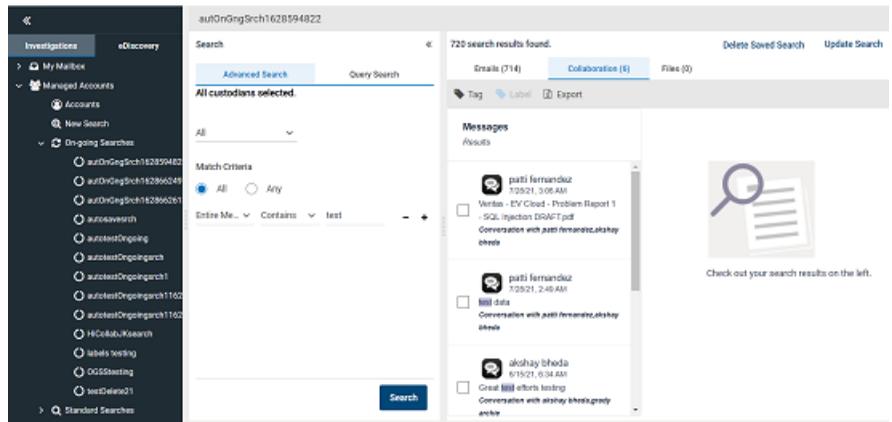
## Exporting collaboration messages

You can export a batch of collaboration messages and share it with the concerned authority for the intended use. To secure the information, you can use the AES-256 encryption while creating a batch of collaboration messages for export. After exporting the batch of messages, you can download and share it with others.

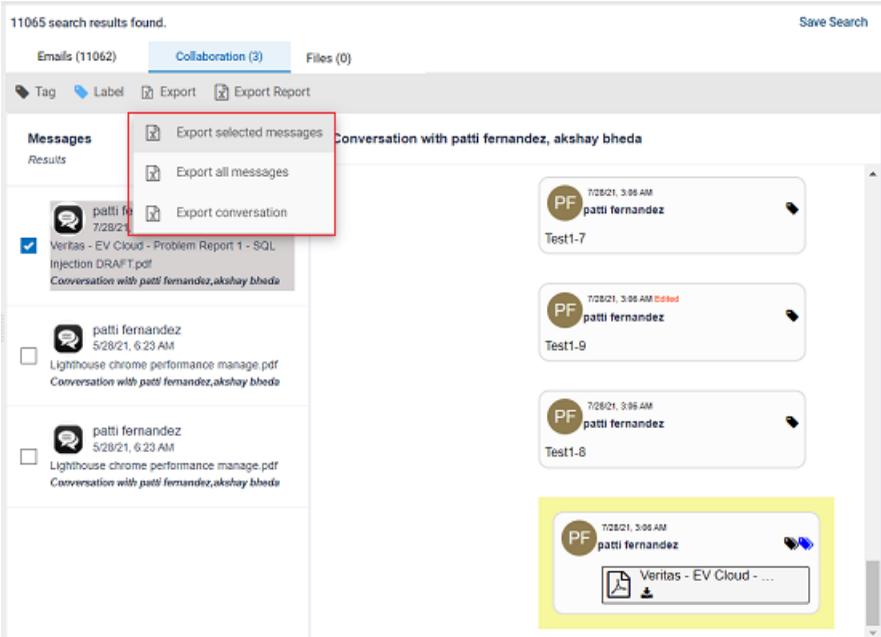
### To export a batch of collaboration messages

- 1 On the **Investigations** tab, create a new search or select the searches from the On-going searches or Standard searches node.
- 2 Perform either an Advanced Search or a Query Search to search for the Collaboration messages. See “[Searching collaboration messages during investigation](#)” on page 96.

The application displays result as shown in the following sample image.



- 3 On the **Collaboration** tab, select the check box for one or more messages (chats) to which you want to apply labels, and click **Export**. Do any of the following:
  - Click **Export selected messages** to export only the selected messages.
  - Click **Export all messages** to export all the available collaboration messages within the search.
  - Click **Export conversation** to export all the conversations for a selected message within a user specified date range.
 It helps you to understand the context of the conversation for review purpose.



4 In the **Export Options** dialog box, do the following:

Export Options
✕

You have selected 1 item(s).

Please select additional export options:

**Message Format** JSON ▾

**Enable AES-256 Encryption**

**Export Name** autOnGngSrch1628594822

**Export Password**

**Confirm Password**

**Share Export** Select Admin(s) ▼

Your download will be available as a single or multiple file segments.

Cancel
Export

**Message Format**

The available message formats are:

- JSON
- EDRM Only

Select the appropriate message format to export the batch. By default, it is JSON.

**Enable AES-256 Encryption**

Select this check-box if you want to secure the access of the downloaded export batch.

**Export Name**

Provide the name for the batch you want to export. By default, it takes the Search Name. You can change it if required.

**Export Password**

Enter the password that you want end user to provide when they access this exported batch of messages.

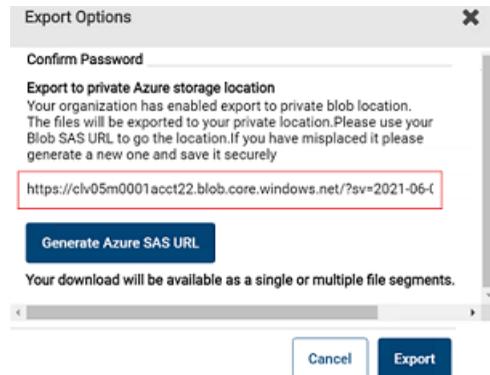
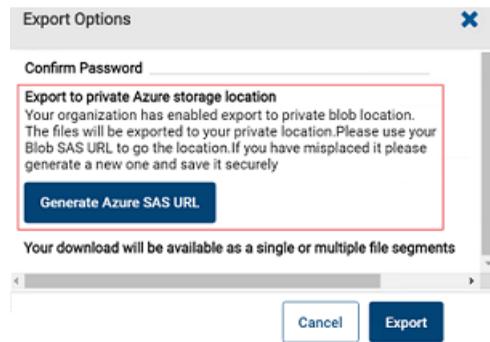
**Confirm Password**

Repeat the same password for confirmation.

**Generate Azure SAS URL**

**Note:** Users can see this button only if the **Export to Azure private storage location** feature in the Veritas Alta View Compliance and Governance Management Console is enabled for them. Users can export items to their private Azure Blob storage location.

Click **Generate Azure SAS URL** to get the Azure Blob SAS URL to access the location and save it for future use.



For security reasons, the application does not show this URL the next time. However, if the SAS URL is misplaced for any reason, click **Generate Azure SAS URL** again to generate a new SAS URL and save it securely.

After you click **Export** on the **Export Options** dialog box, all the selected items are exported to the Azure private storage location. You can use Microsoft Storage Explorer to access the exported items.

**Share Export**

Click **Select Admin** to choose the recipients of this batch export and click **Update**.

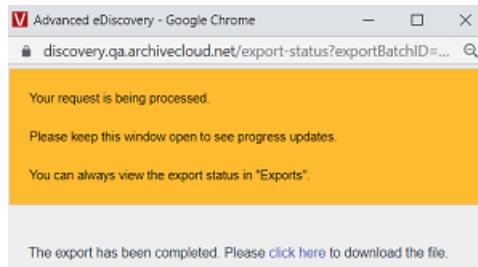
**Note:** You need to manually share the Export Password with the administrators and follow all the security specific rules of the organization.

**5** Click **Export**.

---

**Note:** The exported batch can either gets downloaded as a single or multiple file segments.

---



**6** Click **Click here** to download the exported batch of messages.

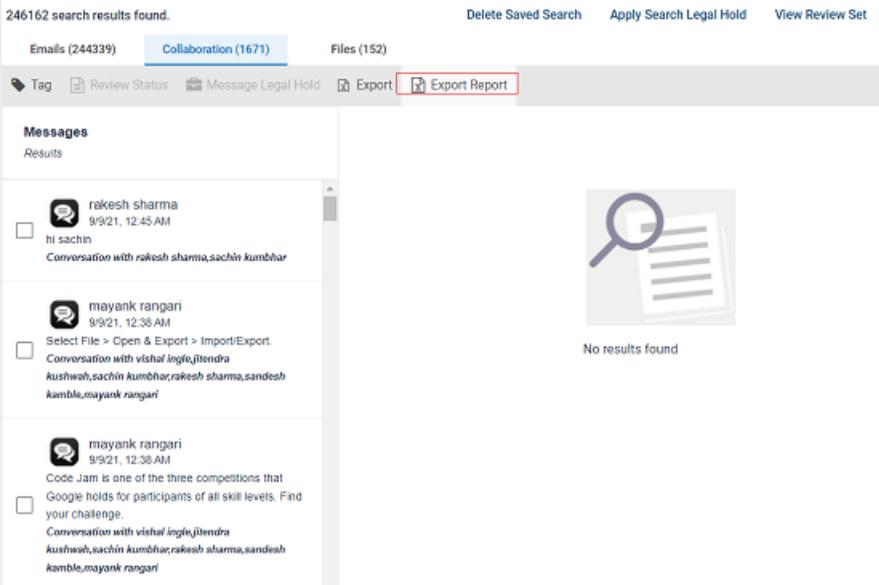
**7** To confirm the status of batch export, on the **Investigations** tab, select **Exports** and check the status of your export.

## Exporting a search summary report for collaboration messages

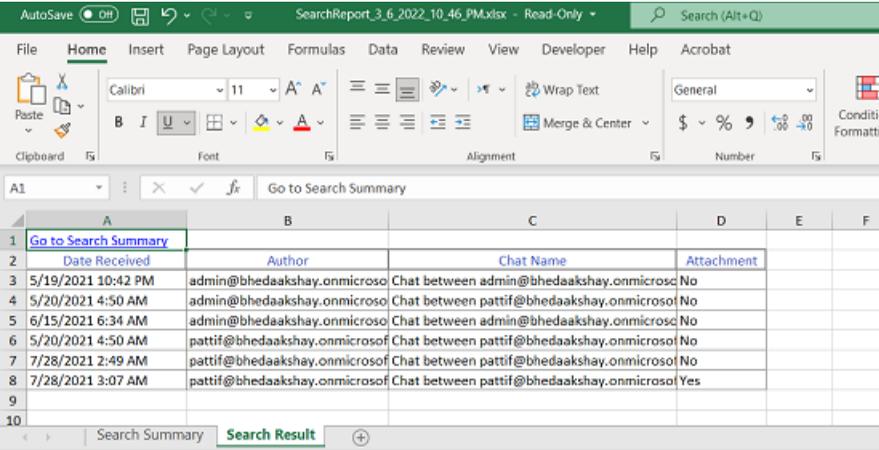
### To export a search summary report for collaboration messages

- 1 On the **Investigation** tab, select the search for which you want to export a summary report.
- 2 Click **New Search** to create a new search. Else, expand **On-going Searches** or **Standard Searches** to select existing search.

3 On the **Collaboration** tab, and click **Export Report**.



The application downloads the summary report (.xlsx) of the collaboration messages within search as a zipped (.zip) folder. A sample report is shown below. The report comprises of two sheets.



**Note:** The **Search Summary** sheet displays details such as Search Parameters and Custodians.

The **Search Result** sheet displays details such as Date Received, Author, list of people involved in chat, and Attachments. The Chat Name column in this summary report includes people involved in the chat. If the list of collaborators is longer than 32766 characters, the application truncates the list. The report displays a note that - *Recipient list is truncate to 32,766 characters, To see the complete list of Recipients, please export the message.* In such scenario, to view the complete list of collaborators, you need to export the individual message.

---

## Working with searched files

In Alta eDiscovery, you can collect the data from OneDrive for Business and Audio-Video archive collectors. To view and review the files, you can access the **Files** tab after creating a search. This tab is visible only if -

- The OneDrive for Business service is enabled and the OneDrive for Business collector is configured.
- The Audio-Video service is enabled and the Audio-Video collector is configured.

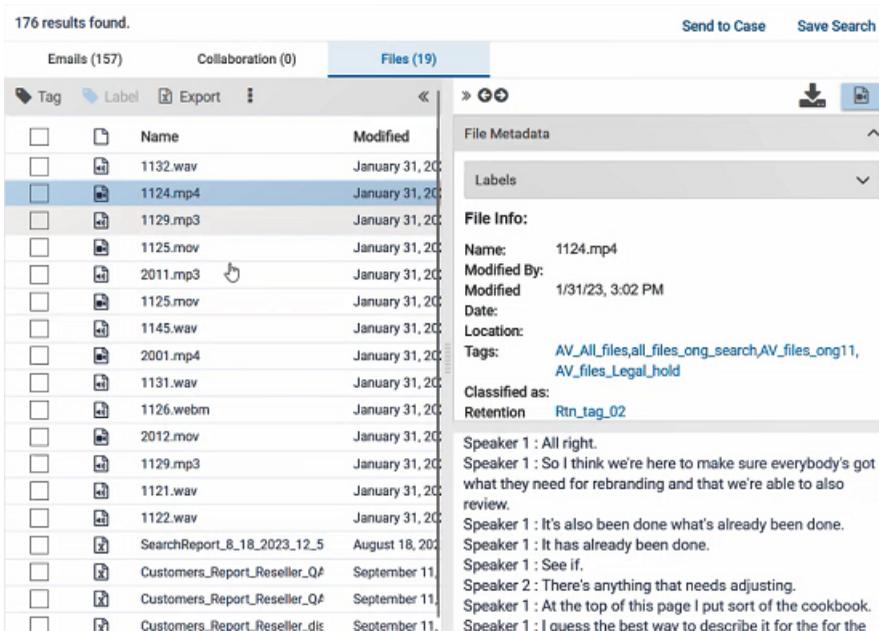
## Working with Audio-Video files

Alta eDiscovery supports managing the archived audio-video files. The audio-video files can be collected from the Audio-Video collectors if these services are enabled for you.

The currently supported formats are as follows:

- **Video Formats:** MP4, MOV, WebM, MPEG-4, and OGG
- **Audio Formats:** MP3, WAV, OGG, AAC, and WebM

After executing a search, the audio-video files are listed under the **Files** tab. When you select the audio-video file, its details are displayed in the **File Metadata** pane as shown in the sample image below.



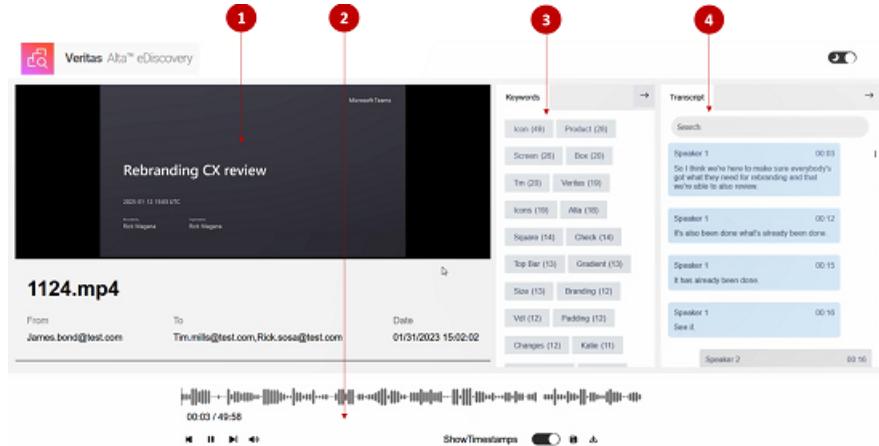
The AI Transcription of the audio-video content appears. Unlike other file formats, you cannot directly view the audio or video files in the native format in the **File Metadata** pane.

Expand the **Labels** section to view the labels applied to the file.

### To view the audio-video file in its native format

- ◆ Search for and select the file, and do any of the following:
  - Click the **Download** icon to save the file on your local computer.
  - Click the **Native viewer** icon available in the top-right corner of the **File Metadata** pane.
 

The selected file opens in a separate window in its native format as shown in the sample image below.



### 1. Native view

This panel displays the audio-video file in its original format.

### 2. Control panel

This panel provides options to rewind, forward, pause, and control audio level of the file. In addition, it provides options to download, save, and view/hide time stamps.

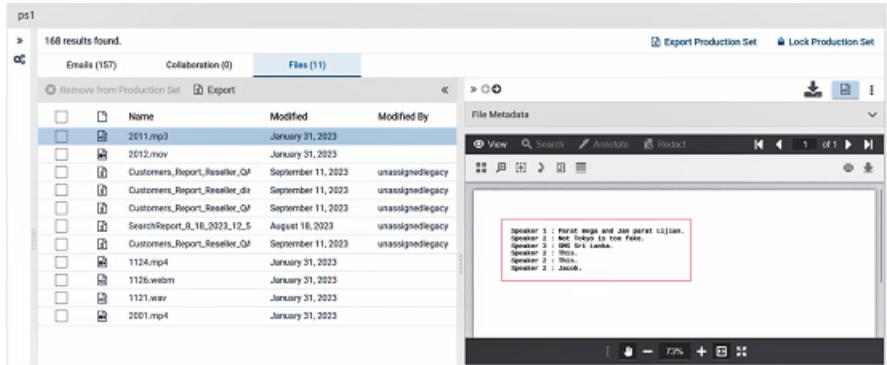
### 3. Keywords

This panel lists the keywords and the exact count of those keywords in the audio-video content. Click the keyword to navigate to the respective content in the audio-video file and play from that point onwards.

### 4. AI Transcript

This panel displays the AI transcript of the audio-video content. to navigate to the respective content in the audio-video file and play from that point onwards.

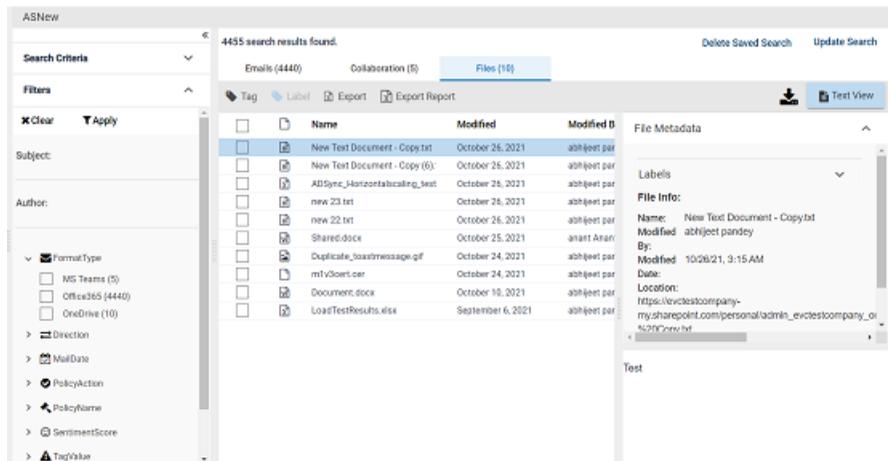
Like other files, you can apply tags and labels to the audio-video files. You can move these files to production sets and export to the intended user. Only the AI transcripts of these files are exportable in PDF format. You can apply annotations and redactions to these PDF files for review purposes. Refer to the sample image of exported AI transcript file.



## Applying tags and legal hold to files

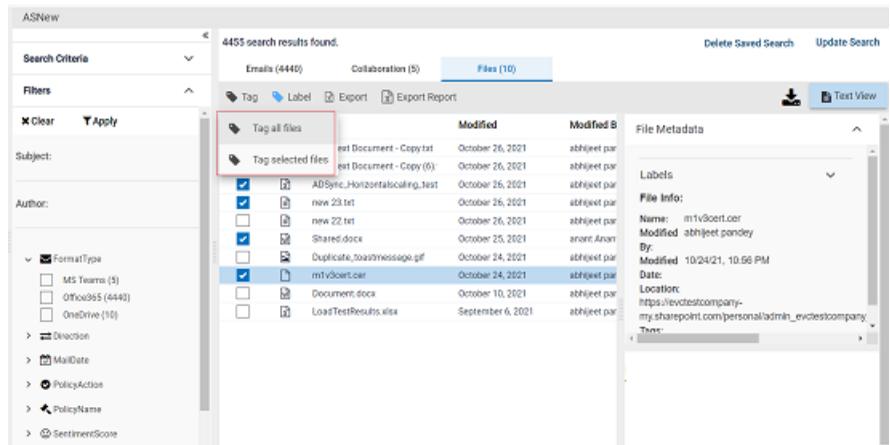
### To apply tag and legal hold to files

- On the **Investigations** tab, navigate to any of the following locations, as required:
  - Managed Accounts > New Search.
  - Managed Accounts > On-going Searches.
  - Managed Accounts > Standard Searches.
- Create a new search or select the existing search in which you want to tag the files.  
The application displays the searched items in the right pane.
- Set the filter options and click **Apply** to view the filtered files.



- 4 In the right pane, on the **Files** tab, select one or more files to which you want to apply tags.

**Note:** Before you apply tags to the files, you can view the previously applied tags of the files in the preview pane. However, you need to select only one file at a time to view the tags. In the following sample image, you can see the previously applied tags and retention tags to the file in the **Files** tab.



- 5 On the action menu, click **Tag**, and do any of the following as required.
  - To tag all the files in the search, click **Tag all files**.
  - To tag only the selected items, click **Tag selected files**.

**6** In the **Add Tag** dialog box, do the following:

Tag Name	Enter a new unique tag name.
Comments	Provide a comment or a description for the tag name.
Legal Hold	Select this check box if you want to apply the legal hold on the files.
Select retention Tag	<p>Instead of applying a new tag, you can apply the retention tags that are created in Veritas Alta Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply.</p> <p>After you select this option, the application disables the <b>Tag Name</b> field.</p>

**7** Click **Tag**.

After you apply tags to the files, these tagged files are available under the respective tags under the **Tags** node.

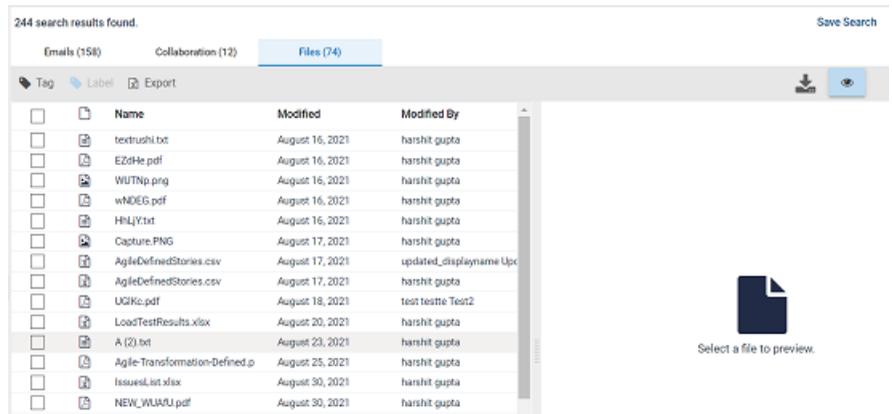
## Applying labels to files

To help organize your work you can apply labels to the files. Labels are applied to files typically to mark them as exempt from the review process.

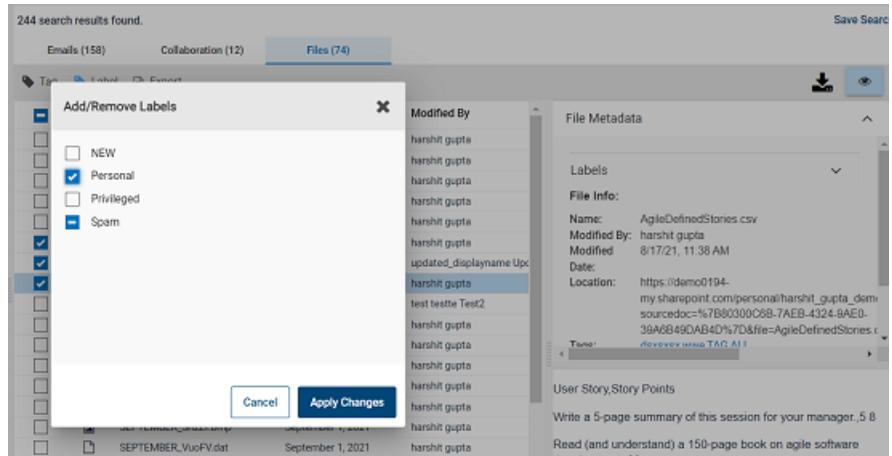
**To apply a label to files**

- 1 On the **Investigations** tab, create a new search or select the searches from the On-going searches or Standard searches node.
- 2 Perform advanced search or query search to get the expected items. See [“Performing Advanced Search and Query Search”](#) on page 312.

The application displays result as shown in the following sample image.



- 3 On the **Files** tab, select the check box for one or more files to which you want to apply labels.
- 4 On the action menu, click **Label**.
- 5 In the **Add/Remove Labels** dialog box, select the labels you want to apply to the files.



You can clear the labels if these are not required anymore. In case you have selected multiple files, the **Add/Remove Labels** dialog box shows applied level status as follows:

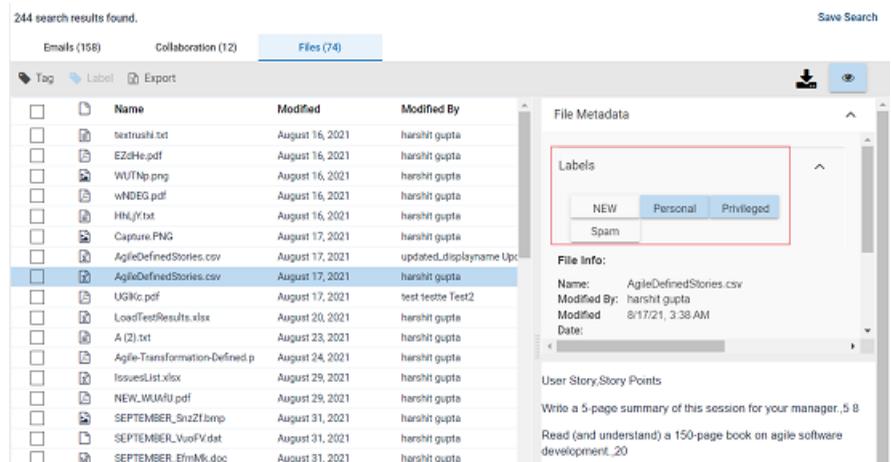
- The check box that is not selected yet means this label is not at all applied to the selected files.
- The check box with the dash mark means the label is applied to some of the selected files, but not applied to all the selected files.
- The check box with the tick mark means the label is applied to all the selected files.

**6** Select the required labels, and click **Apply Changes**.

After you apply labels to the files, these labeled files are available under the respective labels under the **Labels** node.

**7** To ensure if the label is applied to the files, select the file to view its details in the right pane, and expand **Labels**.

See the sample image to view all the applied labels.



You can click any label in the **Labels** popup to navigate to the respective label under the **Labels** node.

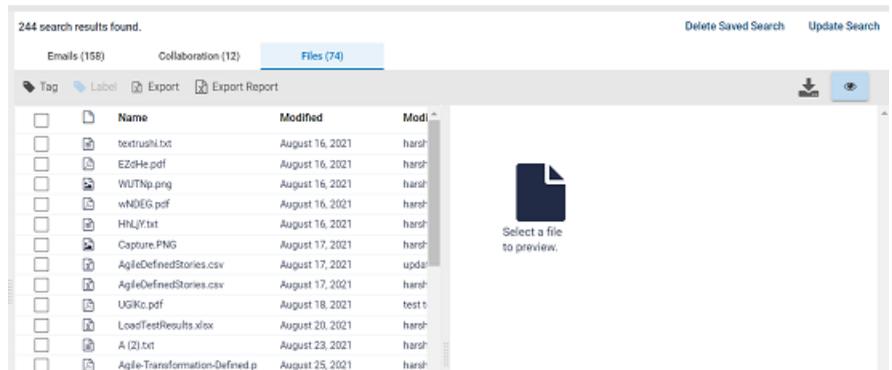
## Exporting searched files

You can export a batch of files and share it with the concerned authority for the intended use. To secure the information, you can use the AES-256 encryption while creating a batch of files for export. After exporting the batch of files, you can download and share it with others.

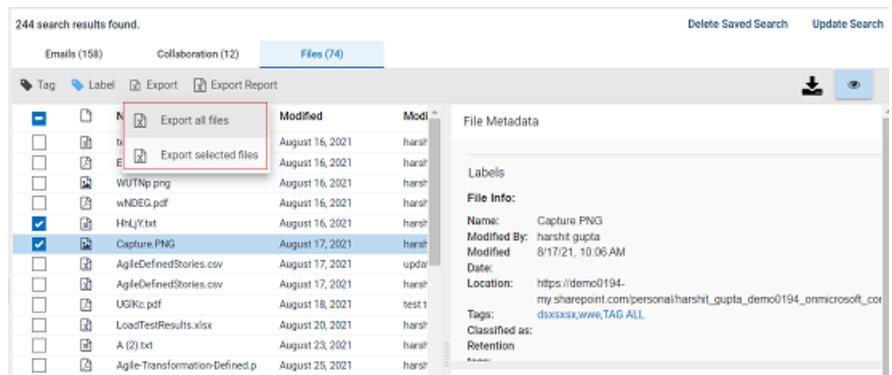
### To export a batch of files

- 1 On the **Investigations** tab, create a new search or select the searches from the On-going searches or Standard searches node.
- 2 Perform advanced search or query search to get the expected items. See “Performing Advanced Search and Query Search” on page 312.

The application displays result as shown in the following sample image.



- 3 On the **Files** tab, select the check box for one or more files, and click **Export**. Do any of the following:
  - Click **Export selected files** to export only the selected files.
  - Click **Export all files** to export all the available files within the search.



- 4 In the **Export Options** dialog box, do the following:

**Export Options**
✕

You have selected 2 item(s).

Please select additional export options:

**Message Format** JSON ▼

**Enable AES-256 Encryption**

**Export Name** 01\_EVC Test

**Export Password**

**Confirm Password**

**Share Export** Select Admin(s) ⚠

Your download will be available as a single or multiple file segments.

Cancel
Export

**Message Format**

The available message formats are:

- JSON
- EDRM Only

Select the appropriate message format to export the batch. By default, it is JSON.

**Enable AES-256 Encryption**

Select this check-box if you want to secure the access of the downloaded export batch.

**Export Name**

Provide the name for the batch you want to export. By default, it takes the Search Name. You can change it if required.

**Export Password**

Enter the password that you want end user to provide when they access this exported batch of files.

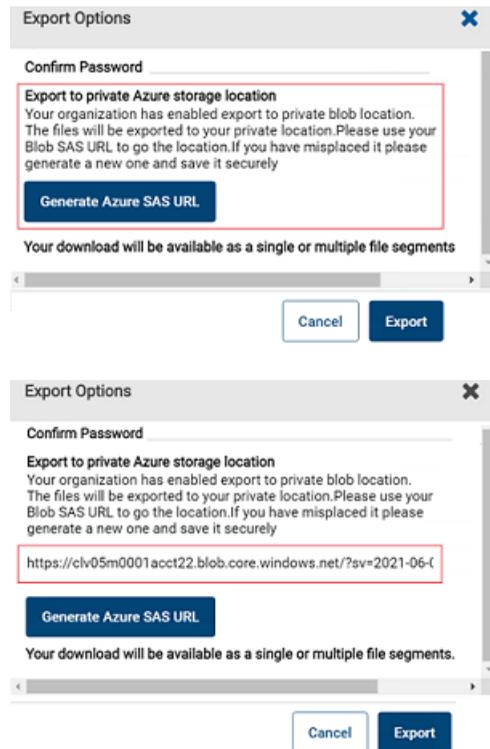
**Confirm Password**

Repeat the same password for confirmation.

**Generate Azure SAS URL**

**Note:** Users can see this button only if the **Export to Azure private storage location** feature in the Veritas Alta View Compliance and Governance Management Console is enabled for them. Users can export items to their private Azure Blob storage location.

Click **Generate Azure SAS URL** to get the Azure Blob SAS URL to access the location and save it for future use.



For security reasons, the application does not show this URL the next time. However, if the SAS URL is misplaced for any reason, click **Generate Azure SAS URL** again to generate a new SAS URL and save it securely.

After you click **Export** on the **Export Options** dialog box, all the selected items are exported to the Azure private storage location. You can use Microsoft Storage Explorer to access the exported items.

**Share Export**

Click **Select Admin** to choose the recipients of this batch export and click **Update**.

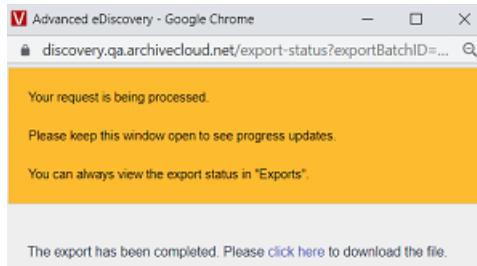
**Note:** You need to manually share the Export Password with the administrators and follow all the security specific rules of the organization.

**5** Click **Export**.

---

**Note:** The exported batch can either gets downloaded as a single or multiple file segments.

---



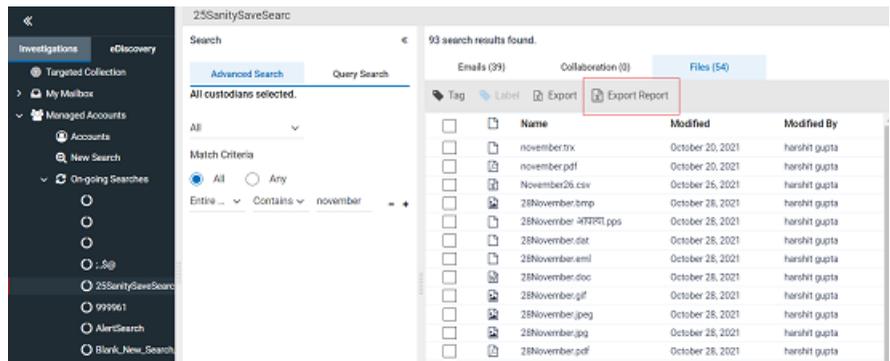
**6** Click **Click here** to download the exported batch of files.

**7** To confirm the status of batch export, on the **Investigations** tab, select **Exports**. The application displays status of performed exports.

## Exporting a search summary report for files

### To export a search summary report for files

- 1 On the **Investigation** tab, select the search for which you want to export a summary report.
- 2 Click **New Search** to create a new search. Else, expand **On-going Searches** or **Standard Searches** to select existing search.
- 3 On the **Files** tab, and click **Export Report**.



The application downloads the summary report (.xlsx) of the files within the search as a zipped (.zip) folder. The report comprises of two sheets.

The **Search Summary** sheet displays details such as Search Parameters and Custodians.

The **Search Result** sheet displays details such as Date Received, list of people involved, and Attachments.

## Working with Advanced ECA searches

The **Advanced Early Case Assessment (ECA)** Search is a new type of search under the Managed Accounts node you can create for investigation purposes. The application creates this node when you create an Advance ECA search for the first time. You don't need to configure anything in the Veritas Alta View Compliance and Governance Management Console to view this node under Managed Accounts.

Advanced ECA search is different from the on-going and standard search. In on-going and standard searches, you can specify certain criteria based on which the application fetches emails, collaboration messages, and files from archives. In case of on-going and standard searches, after creating a search, you cannot again filter the required records (emails, messages, and files) within the search result.

However, in the Advanced ECA search, you can refine your search results based on several filter options. It helps reviewers to filter the records and view the results most easily.

In a single Advanced ECA search, the application can save maximum 250000 records each for emails, collaboration messages, and files. The total records the application can save is maximum 750000 in a single Advanced ECA search.

## Creating an Advanced ECA search

You can create an advanced ECA search in the following ways:

- Create a new search and save it as an Advanced ECA search, as explained in this section.
- Update the existing standard search under the **Managed Accounts** node. See [“Updating an on-going or a standard search from Managed Accounts”](#) on page 74.

### To create an Advanced ECA search

- 1 On the **Investigations** tab, select **Managed Accounts > New Search**.
- 2 Perform advanced search or query search to get the expected items. See [“Performing Advanced Search and Query Search”](#) on page 312.
- 3 Click **Save Search**.

- 4 In the **Save Search** dialog box, enter a unique name for the search.

- 5 Select the **Advanced ECA** check box.

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**Note:** After you select the **Advanced ECA** check box, the application disables the **Tag name** field, the **On-going** check box, and the **Legal Hold** check box.

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- To send this search to a particular case, select the **Send to Case** check box, and select a valid case from the drop-down list.

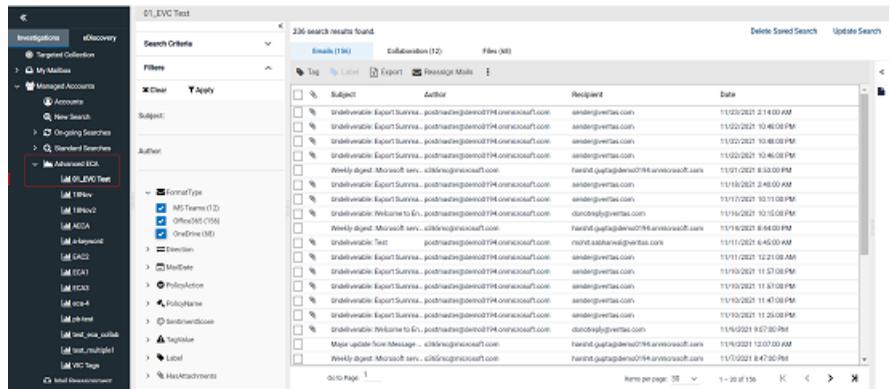
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**Note:** The **Keep copy in Investigations** remains selected by default. When you send the Advanced ECA search from the **Investigations** tab to a Case in the **eDiscovery** tab, it gets saved under **Research Sets**. After sending this Advanced ECA search to Case, it may show different result (email count) depending on the custodians selected in the **Case Setup** option.

---

- Click **Save**.

The search appears under the Advanced ECA node in the left navigation pane as shown in the image below.



After the search is created, you can select the appropriate filter options to refine the search results. For example, under **Filters**, expand **FormatType** and select **MS Teams** to view only MS teams related search results.

In a single Advanced ECA search, the application can save maximum 250000 records each for emails, collaboration messages, and files. The total records the application can save is maximum 750000 in a single Advanced ECA search.

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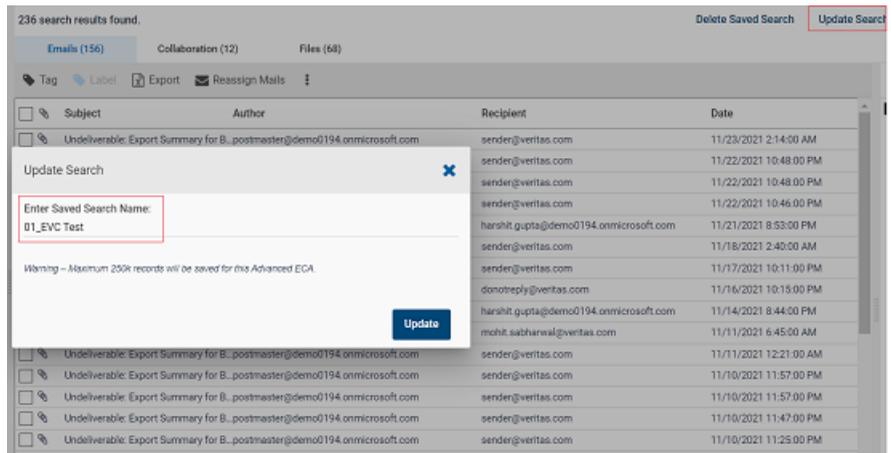
**Note:** If the Advanced ECA search processing fails, you need to click **Please try again** to retry processing. If this search fails consecutively, you need to delete the search and create a new search again.

---

## Updating an Advanced ECA search

### To update an Advanced ECA search

- 1 On the **Investigations** tab, select **Managed Accounts**.
- 2 Select the Advanced ECA search that you want to update for its name.  
The searched items appear in the details pane.
- 3 Click **Update Search**.



- 4 Enter a unique name for the search.
- 5 Click **Update**.

## Filtering an Advanced ECA search

### To filter an Advanced ECA search

- 1 On the **Investigations** tab, select **Managed Accounts**.
- 2 Select the already existing Advanced ECA search that you want to filter.  
The search opens in the right pane.
- 3 Expand **Search Criteria** to view the criteria based on which this Advanced ECA search is created. You cannot edit the search criteria of Advanced ECA search.

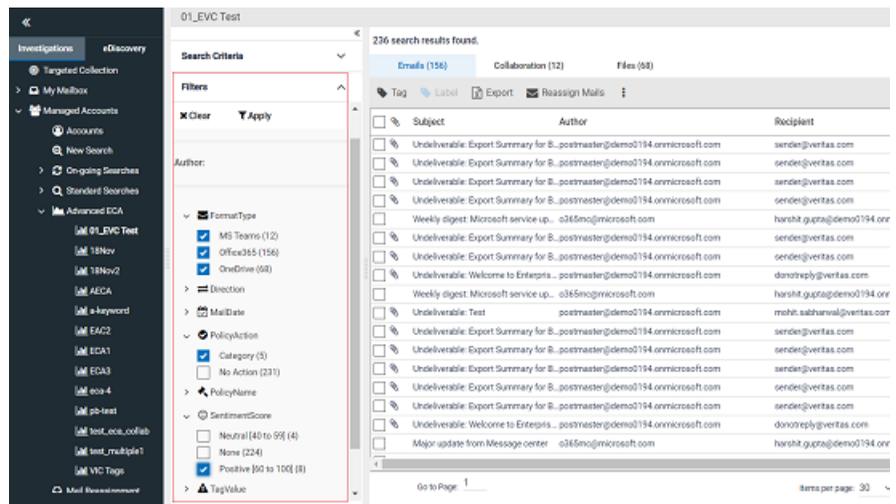
- Expand **Filters**, and click **Apply** to view the total number of records captured while saving this Advanced ECA search.

**Note:** Clicking **Apply** is a mandatory action to view correct number of filtered records in the Advanced ECA search.

In a single Advanced ECA search, the application can save maximum 250000 records each for emails, collaboration messages, and files. The total records the application can save is maximum 750000 in a single Advanced ECA search. Out of 250000 records, the application displays only 50000 email records to users based on the filters applied. Users need to set the filter criteria carefully to filter desired archived items.

If number of filtered item messages is greater than 50000, the application displays the following message:

***Too many items match the filter. The review set is capped at 50000 items.***



- Under **Filters**, select or clear corresponding filter options.

The **Filters** section provides the following filter options that you can select or clear based on the idea of record analysis. To reset all filter options simultaneously, click **Clear**. You cannot save the filter criteria. After you clear the filter options, you need to set the filter options again.

<b>Filter Name</b>	<b>Action</b>
<b>Subject</b>	Specify any word or a term that is used in the Subject statement of a Search item.
<b>Author</b>	Specify the author of that email or message.
<b>FormatType</b>	Select this option to filter records based on format type.
<b>Direction</b>	Selects items that are traveling in a certain direction (incoming, outgoing, or interoffice communications).
<b>MailDate</b>	Specify the duration of the records you want to search. You can customize the date range.
<b>PolicyAction</b>	<p>Selects items by the policy action with which your policy management software has tagged them. This action can be one of the following:</p> <ul style="list-style-type: none"> <li>■ Inclusion (demands or suggests capture)</li> <li>■ Exclusion (precludes capture or advocates non-capture)</li> <li>■ No Action (the item is subject to normal random sampling)</li> </ul>
<b>PolicyName</b>	Specify the specific policy with which your policy management software has tagged the items you want to filter.
<b>SentimentScore</b>	Classifies and displays the records based on their sentiment score. Click the displayed options to view those specific records.
<b>TagValue</b>	Select the specific tags to filter items to which these tags are applied.
<b>Label</b>	Select the specific labels to filter items to which these labels are applied.
<b>HasAttachments</b>	Specify if you want to filter records that have or have not the attachments to them.

- 6** Click **Apply** to view the filtered records from the selected Advanced ECA search.

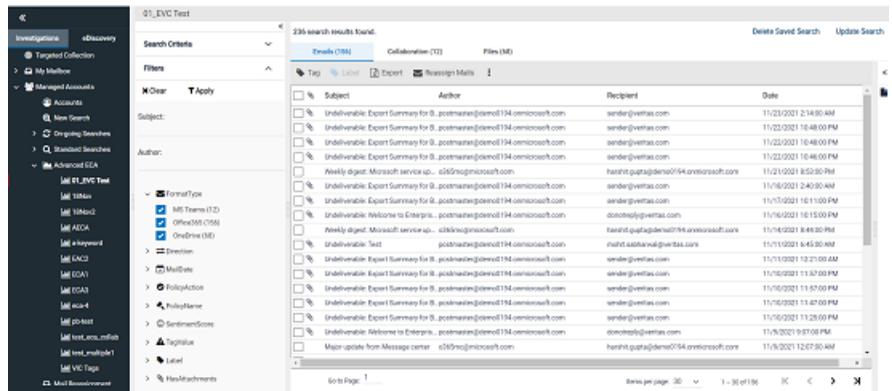
## Applying tags to the Advanced ECA search items

You can apply new tags to emails, collaboration messages, and files that are filtered during the Advanced ECA search. You can also view the previously applied tags and classification tags of the items. The following sections explains how to apply tags to these search items.

## Applying tags to emails in Advanced ECA search

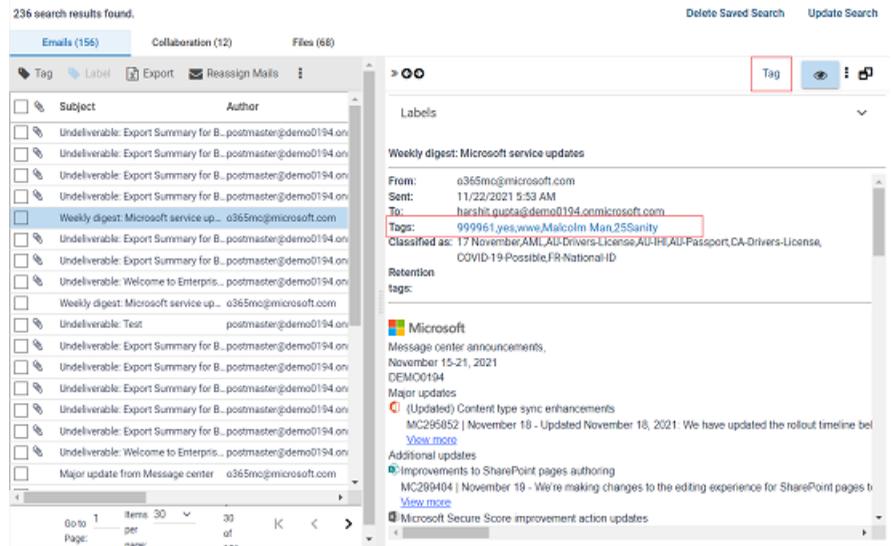
To apply tags to emails in Advanced ECA search

- 1 On the **Investigations** tab, select **Managed Accounts > Advanced ECA**.
- 2 Select the Advanced ECA search in which you want to tag the records. The search result opens in the right pane.
- 3 Set the filter options and click **Apply** to view the filtered items.



- In the right pane, on the **Emails** tab, select one or more emails to which you want to apply tags.

**Note:** Before you apply tags to the items, you can view the previously applied tags of the items in the preview pane. However, you need to select only one item at a time to view the tags. In the following sample image, you can see the previously applied tags and retention tags to the email in the **Emails** tab.



- To add a tag to an individual item, click the item to preview its details in the preview pane, and click **Tag** as shown in the image above.
- To add a tag to multiple items, on the action menu, click **Tag**, and select any of the following options as required.
  - To tag all the items in the search, click **Tag all emails**.
  - To tag all the items in the current page, click **Tag current page**.
  - To tag only the selected items, click **Tag selected emails**.

01\_EVC Test

236 search results found.

Search Criteria

Filters

✕ Clear    ▶ Apply

Subject:

Author:

FormatType

- MS Teams (12)
- Office365 (156)
- OneDrive (68)

236 search results found.

Emails (156)    Collaboration (12)    Files (68)

Tag    Label    Export    Reassign Mails

	Author	Recipient
<input type="checkbox"/> Tag all emails		
<input type="checkbox"/> Tag current page	Summary for B... postmaster@demo0194.onmicrosoft.com	sender@veritas.com
<input type="checkbox"/> Tag selected emails	Summary for B... postmaster@demo0194.onmicrosoft.com	sender@veritas.com
<input type="checkbox"/> Undeliverable: Export Summary for B... postmaster@demo0194.onmicrosoft.com	Summary for B... postmaster@demo0194.onmicrosoft.com	sender@veritas.com
<input type="checkbox"/> Weekly digest: Microsoft service up... a365mc@microsoft.com	Summary for B... postmaster@demo0194.onmicrosoft.com	harsht.gupta@demo0194.onmicrosoft.com
<input checked="" type="checkbox"/> Undeliverable: Export Summary for B... postmaster@demo0194.onmicrosoft.com	Summary for B... postmaster@demo0194.onmicrosoft.com	sender@veritas.com
<input checked="" type="checkbox"/> Undeliverable: Export Summary for B... postmaster@demo0194.onmicrosoft.com	Summary for B... postmaster@demo0194.onmicrosoft.com	sender@veritas.com
<input checked="" type="checkbox"/> Undeliverable: Welcome to Enterpris... postmaster@demo0194.onmicrosoft.com	Summary for B... postmaster@demo0194.onmicrosoft.com	donotreply@veritas.com
<input type="checkbox"/> Weekly digest: Microsoft service up... a365mc@microsoft.com	Summary for B... postmaster@demo0194.onmicrosoft.com	harsht.gupta@demo0194.onmicrosoft.com

**7** In the **Add Tag** dialog box, do the following:

- |                      |  |
|----------------------|--|
| Tag Name             | Enter a new unique tag name.   |
| Comments             | Provide a comment or a description for the tag name.   |
| Legal Hold           | Select this check box if you want to apply the legal hold on the emails.   |
| Select retention Tag | <p>Instead of applying a new tag, you can apply the retention tags that are created in Veritas Alta Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply.</p> <p>After you select this option, the application disables the <b>Tag Name</b> field.</p> |

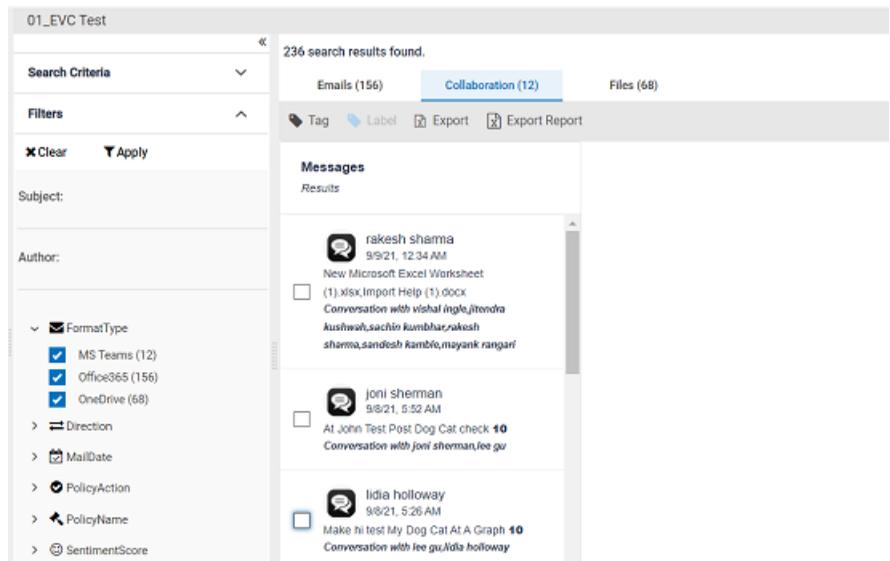
**8** Click **Tag**.

After you apply tags to the emails, these tagged emails are available under the respective tags under the **Tags** node.

## Applying tags to collaboration messages in Advanced ECA search

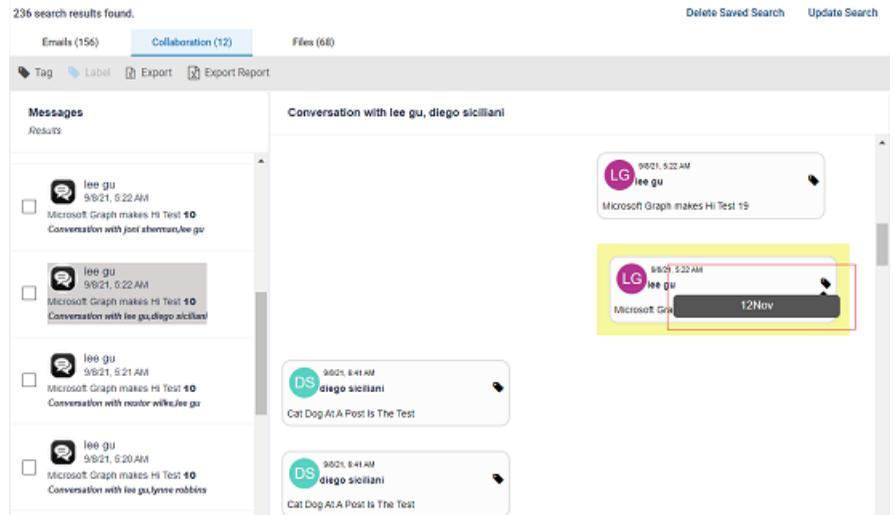
To apply tags to the collaboration messages in Advanced ECA search

- 1 On the **Investigations** tab, select **Managed Accounts > Advanced ECA**.
- 2 Select the Advanced ECA search in which you want to tag the records. The search result opens in the right pane.
- 3 Set the filter options and click **Apply** to view the filtered items.



- 4 In the right pane, on the **Collaboration** tab, select the collaboration messages to which you want to apply tags.

**Note:** Before you apply tags to the items, you can view the previously applied tags and classification tags of the message in the preview pane. In the following sample image, you can see the previously applied tags and classification tags of the collaboration messages when you hover over the icons.



- 5 On the action menu, click **Tag**, and do any of the following as required.
  - To tag all the items in the search, click **Tag all messages**.
  - To tag only the selected items, click **Tag selected messages**.

236 search results found. Delete Saved Search Update Search

Emails (156) **Collaboration (12)** Files (68)

Tag Label Export Export Report

Tag all messages  
Tag selected messages

lee gu 9/21, 5:22 AM  
Microsoft Graph makes Hi Test: 10  
Conversation with jon@heman,lee gu

lee gu 9/21, 5:22 AM  
Microsoft Graph makes Hi Test: 10  
Conversation with lee gu,diego.siciliani

lee gu 9/21, 5:21 AM  
Microsoft Graph makes Hi Test: 10  
Conversation with nestor.wilke,lee gu

lee gu 9/21, 5:20 AM  
Microsoft Graph makes Hi Test: 10  
Conversation with lee gu,lynn.robbers

**Conversation with lee gu, diego.siciliani**

LG 9/21, 5:22 AM  
lee gu  
Microsoft Graph makes Hi Test 19

LG 9/21, 5:22 AM  
lee gu  
Microsoft Graph makes Hi Test 10

DS 9/21, 6:41 AM  
diego.siciliani  
Cat Dog AI A Post Is The Test

DS 9/21, 6:41 AM  
diego.siciliani  
Cat Dog AI A Post Is The Test

**6** In the **Add Tag** dialog box, do the following:

Tag Name	Enter a new unique tag name.
Comments	Provide a comment or a description for the tag name.
Legal Hold	Select this check box if you want to apply the legal hold on the emails.
Select retention Tag	<p>Instead of applying a new tag, you can apply the retention tags that are created in Veritas Alta Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply.</p> <p>After you select this option, the application disables the <b>Tag Name</b> field.</p>

**7** Click **Tag**.

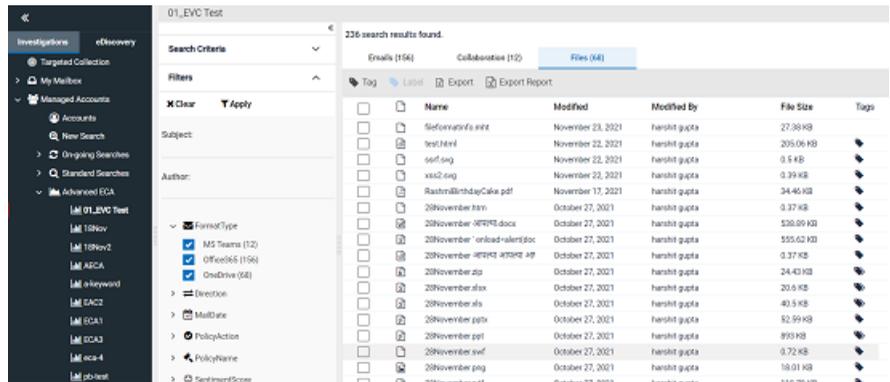
After you apply tags to the emails, these tagged emails are available under the respective tags under the **Tags** node.

## Applying tags to files in Advanced ECA search

### To apply tags to files in Advanced ECA search

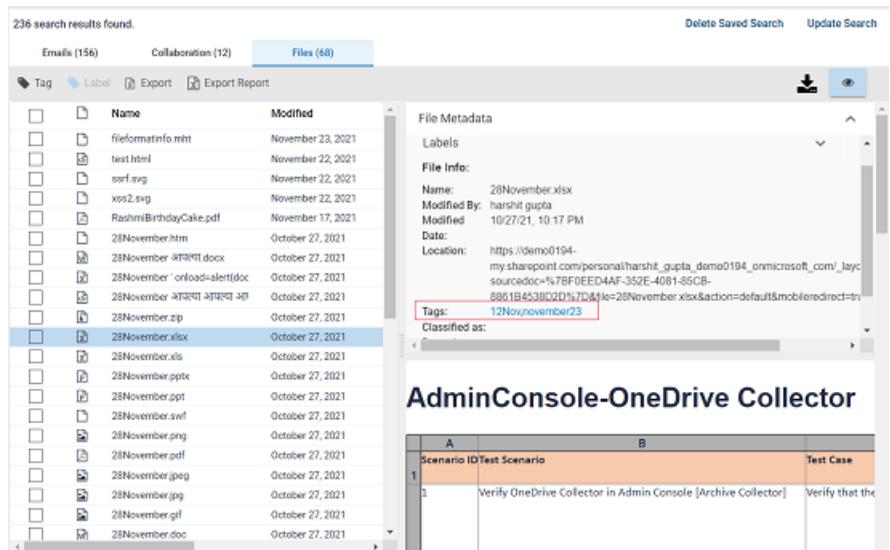
- 1** On the **Investigations** tab, select **Managed Accounts > Advanced ECA**.
- 2** Select the Advanced ECA search in which you want to tag the records. The search result opens in the right pane.

3 Set the filter options and click **Apply** to view the filtered items.



4 On the **Files** tab, select the files to which you want to apply tags.

**Note:** Before you apply tags to the items, you can view the previously applied tags of the file in the preview pane. In the following sample image, you can see the previously applied tags and retention tags to the file.



5 On the action menu, click **Tag**, and do any of the following as required.

- To tag all the items in the search, click **Tag all files**.

- To tag only the selected items, click **Tag selected files**.

236 search results found. Delete Saved Search Update Search

Emails (156) Collaboration (12) **Files (68)**

Tag Label Export Export Report

Tag all files

Tag selected files

		Modified	Mk
<input type="checkbox"/>	natinfo.mht	November 23, 2021	hja
<input type="checkbox"/>	ml	November 22, 2021	hja
<input type="checkbox"/>	scrf.svg	November 22, 2021	hja
<input type="checkbox"/>	sss2.svg	November 22, 2021	hja
<input type="checkbox"/>	flashmi@rthdayCake.pdf	November 17, 2021	hja
<input type="checkbox"/>	28November.htm	October 27, 2021	hja
<input type="checkbox"/>	28November-9f727d.docx	October 27, 2021	hja
<input checked="" type="checkbox"/>	28November-onload=alert(1).doc	October 27, 2021	hja
<input checked="" type="checkbox"/>	28November-3f9f9f-3f9f9f-3f9f9f	October 27, 2021	hja
<input checked="" type="checkbox"/>	28November.zip	October 27, 2021	hja
<input checked="" type="checkbox"/>	28November.xlsx	October 27, 2021	hja
<input type="checkbox"/>	28November.xls	October 27, 2021	hja
<input type="checkbox"/>	28November.pptc	October 27, 2021	hja
<input type="checkbox"/>	28November.ppt	October 27, 2021	hja
<input type="checkbox"/>	28November.swf	October 27, 2021	hja
<input type="checkbox"/>	28November.png	October 27, 2021	hja

File Metadata

Labels

**File Info:**

Name: 28November.xlsx  
 Modified By: harshil.gupta  
 Modified: 10/27/21, 10:17 PM  
 Date:  
 Location: https://demo0194-my.sharepoint.com/personal/harshil.gupta\_demo0194\_onmicrosoft\_com/\_source/doc-%7BF0EED4AF-352E-4081-85CB-8861B4538D2C%7D&file=28November.xlsx&action=default&mobileredirect=1?M=November23

1,"Eldon Base for stackable storage shelf, platinum",Muhammed MacIntyre,3,-213,25,38,94,35,Nunavut,Storage & Organization,0,8

2,"1.7 Cubic Foot Compact ""Cube"" Office Refrigerators",Barry French,293,457,81,208,16,68,02,Nunavut,Appliances,0,58

**6** In the **Add Tag** dialog box, do the following:

Tag Name	Enter a new unique tag name.
Comments	Provide a comment or a description for the tag name.
Legal Hold	Select this check box if you want to apply the legal hold on the emails.
Select retention Tag	<p>Instead of applying a new tag, you can apply the retention tags that are created in Veritas Alta Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply.</p> <p>After you select this option, the application disables the <b>Tag Name</b> field.</p>

**7** Click **Tag**.

After you apply tags to the emails, these tagged emails are available under the respective tags under the **Tags** node.

## Applying labels to the Advanced ECA search items

You can apply new labels to emails, collaboration messages, and files that are filtered during the Advanced ECA search. You can also view the previously applied labels of the items. The following sections explains how to apply labels to these search items.

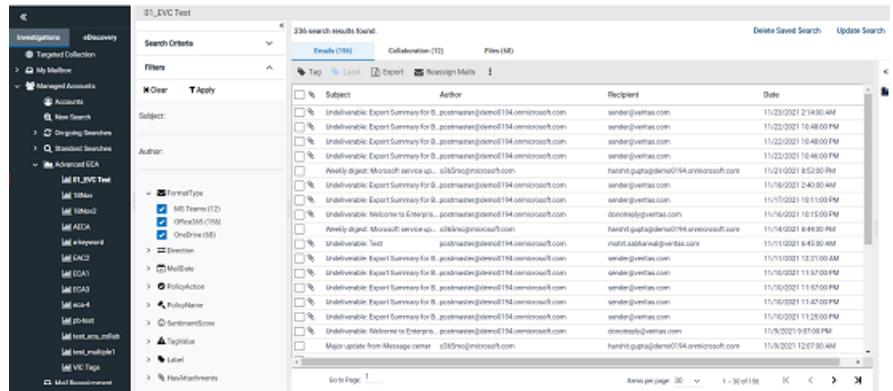
## Applying labels to emails in Advanced ECA search

### To apply labels to emails in Advanced ECA search

- 1 On the **Investigations** tab, select **Managed Accounts > Advanced ECA**.
- 2 Select the Advanced ECA search in which you want to filter the records and apply labels to the required emails within the search.

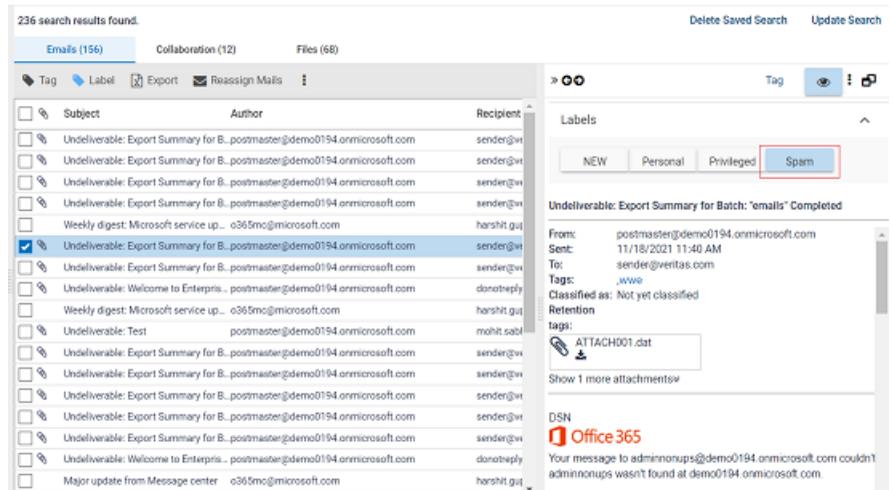
The search result opens in the right pane.

- 3 Set the filter options and click **Apply** to view the filtered items.

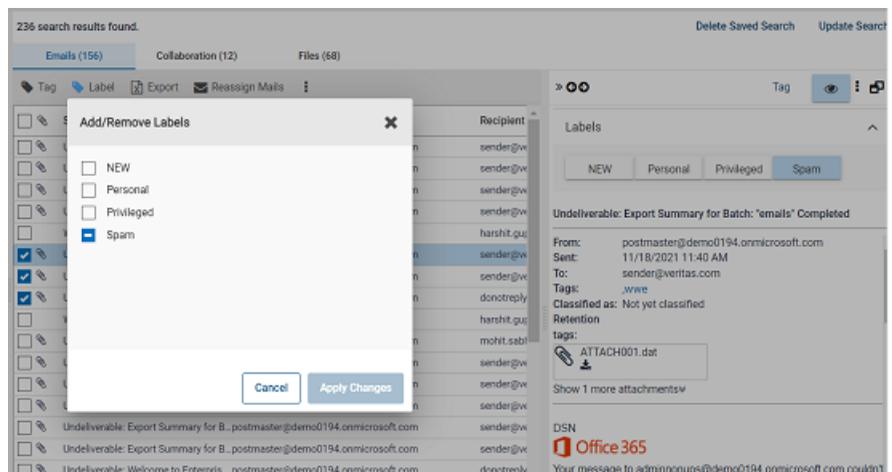


- On the Emails tab, select the emails to which you want to apply labels.

**Note:** Before you apply labels to the items, you can view the previously applied labels of the items in the preview pane.



- On the action menu, click **Label**.
- In the **Add/Remove Labels** dialog box, select the labels you want to apply to the emails.



You can clear the labels if these are not required anymore. In case you have selected multiple emails the **Add/Remove Labels** dialog box shows applied level status as follows:

- The check box that is not selected yet means this label is not at all applied to the selected emails.
- The check box with the dash mark means the label is applied to some of the selected emails, but not applied to all the selected emails.
- The check box with the tick mark means the label is applied to all the selected emails.

**7** Select the required labels, and click **Apply Changes**.

After you apply labels to the emails, these labeled emails are available under the respective labels under the **labels** node.

**8** To ensure if the label is applied to the emails, select the emails, and expand the **Labels** section to view its details in the right pane.

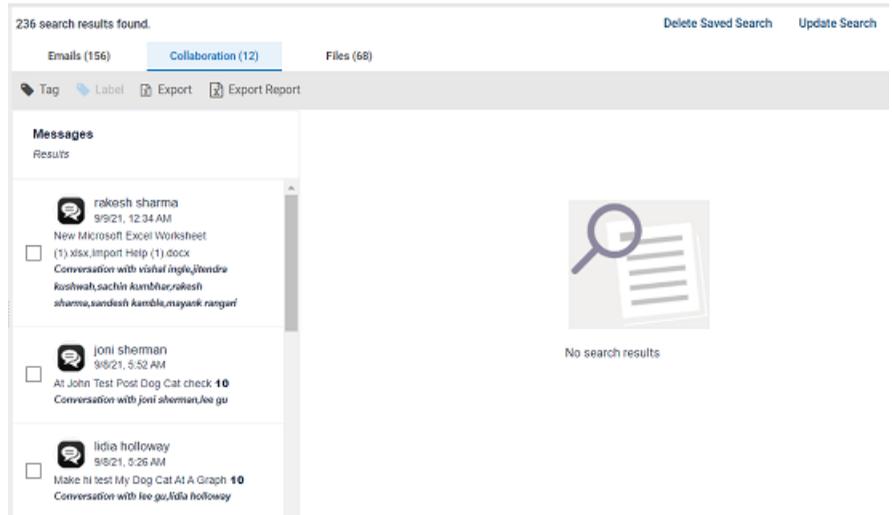
## **Applying labels to collaboration messages in Advanced ECA search**

**To apply labels to collaboration messages in Advanced ECA search**

- 1** On the **Investigations** tab, select **Managed Accounts > Advanced ECA**.
- 2** Select the Advanced ECA search in which you want to filter the records and apply labels to the required collaboration messages within the search.

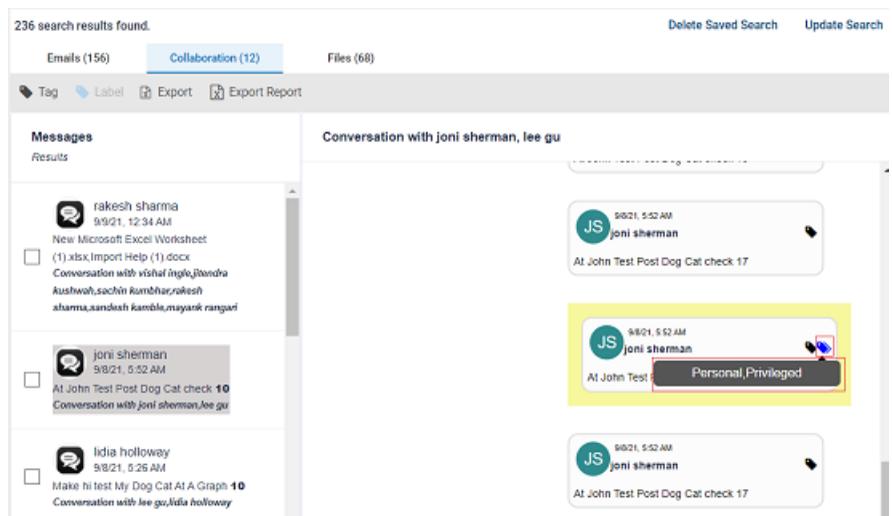
The search result opens in the right pane.

- 3 Set the filter options and click **Apply** to view the filtered items.

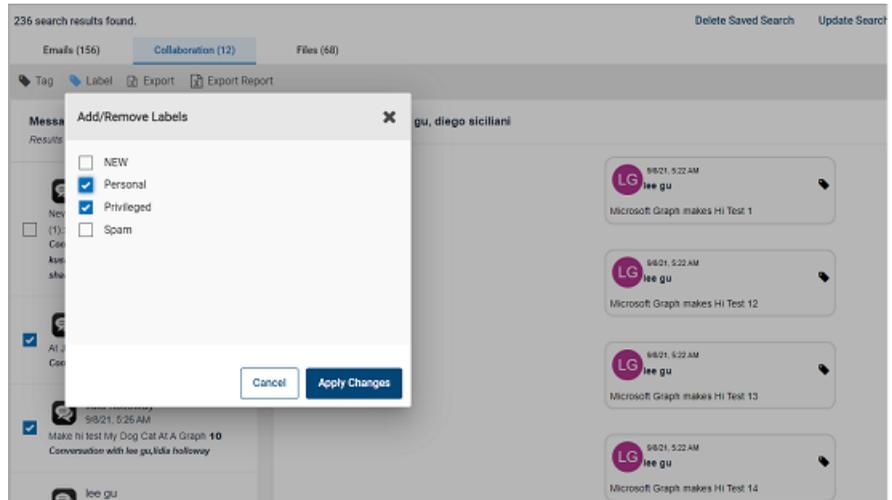


- 4 On the **Collaboration** pane, select the collaboration messages to which you want to apply labels.

**Note:** Before you apply labels to the items, you can view the previously applied labels of the items in the preview pane.



- 5 On the action menu, click **Label**.
- 6 In the **Add/Remove Labels** dialog box, select the labels you want to apply to the emails.



You can clear the labels if these are not required anymore. In case you have selected multiple messages, the **Add/Remove Labels** dialog box shows applied level status as follows:

- The check box that is not selected yet means this label is not at all applied to the selected messages.
- The check box with the dash mark means the label is applied to some of the selected messages, but not applied to all the selected message.
- The check box with the tick mark means the label is applied to all the selected messages.

- 7 Select the required labels, and click **Apply Changes**.

After you apply labels to the collaboration messages, these labeled messages are available under the respective labels under the **labels** node.

- 8 To ensure if the label is applied to the messages, select the message, and expand the **Labels** section to view its details in the right pane.

## Applying labels to files in Advanced ECA search

To apply labels to files in Advanced ECA search

- 1 On the **Investigations** tab, select **Managed Accounts > Advanced ECA**.
- 2 Select the Advanced ECA search in which you want to filter the records and apply labels to the required files within the search.

The search result opens in the right pane.

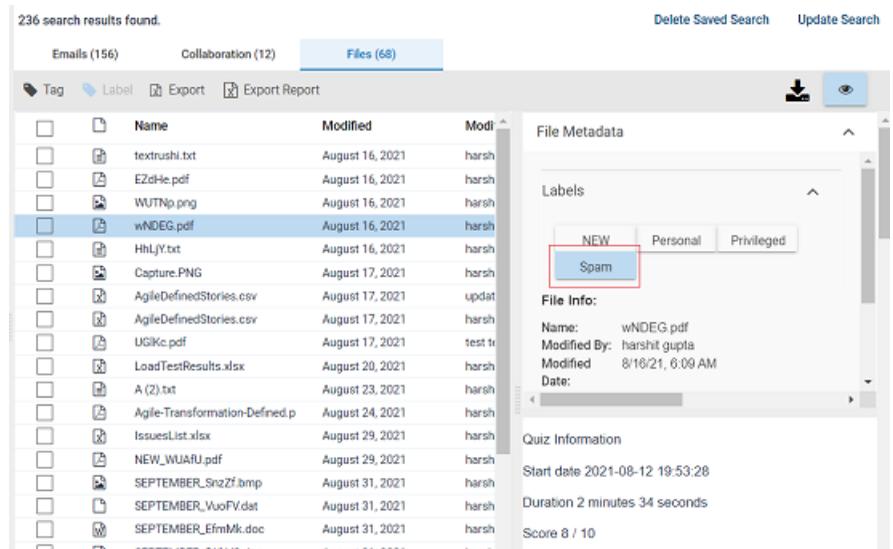
- 3 Set the filter options and click **Apply** to view the filtered items.

The screenshot displays the '01\_EVC Test' search results page. The left sidebar shows the navigation menu with 'Investigations' and 'eDiscovery' tabs. Under 'Managed Accounts', 'Advanced ECA' is expanded to show '01\_EVC Test'. The main search criteria section includes 'Search Criteria' and 'Filters'. The 'Filters' section is expanded to show 'FormatType' with sub-filters for 'MS Teams (12)', 'OneDrive (156)', and 'OneDrive (88)'. The search results table shows 236 results found, with 60 files selected. The table columns are 'Name', 'Modified', and 'Modi'. The results list includes files like 'texttrush.txt', 'E20Kie.pdf', 'WU7hp.png', 'wNDEC.pdf', 'lN41.txt', 'Caption.PNG', 'AgileDefinedStories.cor', 'AgileDefinedStories.cor', 'UG8Kc.pdf', 'LoadTestResults.xlsx', 'A (2).txt', 'Agile-Transformation-Defined.p', 'IssuesList.xlsx', 'NEH\_YUAKU1.pdf', 'SEPTEMBER\_SuzZ7.bmp', 'SEPTEMBER\_VisPr1.dat', and 'SEPTEMBER\_EhVh4.doc'.

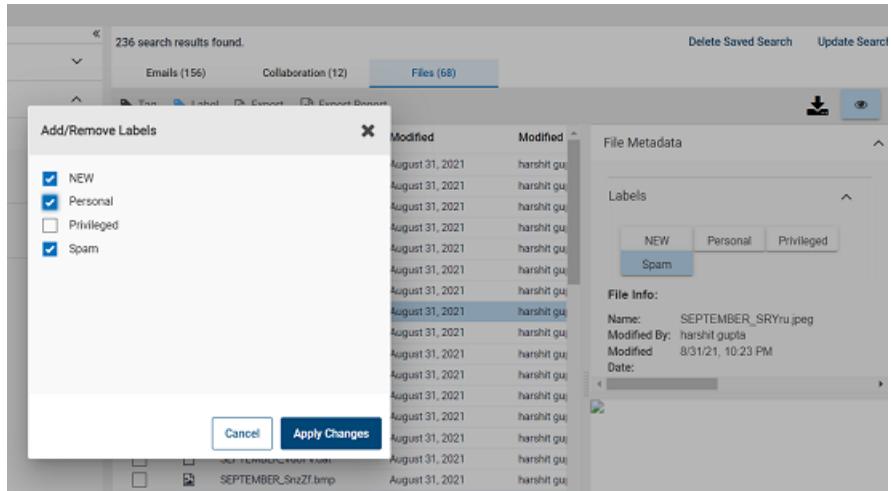
Name	Modified	Modi
<input type="checkbox"/> texttrush.txt	August 16, 2021	harsh
<input type="checkbox"/> E20Kie.pdf	August 16, 2021	harsh
<input type="checkbox"/> WU7hp.png	August 16, 2021	harsh
<input type="checkbox"/> wNDEC.pdf	August 16, 2021	harsh
<input type="checkbox"/> lN41.txt	August 16, 2021	harsh
<input type="checkbox"/> Caption.PNG	August 17, 2021	harsh
<input type="checkbox"/> AgileDefinedStories.cor	August 17, 2021	updat
<input type="checkbox"/> AgileDefinedStories.cor	August 17, 2021	harsh
<input type="checkbox"/> UG8Kc.pdf	August 17, 2021	test ti
<input type="checkbox"/> LoadTestResults.xlsx	August 20, 2021	harsh
<input type="checkbox"/> A (2).txt	August 23, 2021	harsh
<input type="checkbox"/> Agile-Transformation-Defined.p	August 24, 2021	harsh
<input type="checkbox"/> IssuesList.xlsx	August 28, 2021	harsh
<input type="checkbox"/> NEH_YUAKU1.pdf	August 29, 2021	harsh
<input type="checkbox"/> SEPTEMBER_SuzZ7.bmp	August 31, 2021	harsh
<input type="checkbox"/> SEPTEMBER_VisPr1.dat	August 31, 2021	harsh
<input type="checkbox"/> SEPTEMBER_EhVh4.doc	August 31, 2021	harsh

- 4 On the **Files** pane, select the files to which you want to apply labels.

**Note:** Before you apply labels to the files, you can view the previously applied labels of the files in the preview pane.



- 5 In the preview pane, click the **Text View** or **Native View** icon to toggle between the file views.  
 Text view displays the file content in the plain text format. Whereas, the native view displays the file content in the original format, for example, MS Word, PDF, and so on.
- 6 (Optional) In the preview pane, click the download icon to save file on your local computer.
- 7 On the action menu, click **Label**.
- 8 In the **Add/Remove Labels** dialog box, select the labels you want to apply to the files.



You can clear the labels if these are not required anymore. In case you have selected multiple files the **Add/Remove Labels** dialog box shows applied level status as follows:

- The check box that is not selected yet means this label is not at all applied to the selected files.
  - The check box with the dash mark means the label is applied to some of the selected files, but not applied to all the selected files.
  - The check box with the tick mark means the label is applied to all the selected files.
- 9** Select the required labels, and click **Apply Changes**.

After you apply labels to the files, these labeled files are available under the respective labels under the **labels** node.

- 10** To ensure if the label is applied to the files, select the emails, and expand the **Labels** section to view its details in the right pane.

## Exporting the Advanced ECA search items

You can export maximum 50000 records at a time.

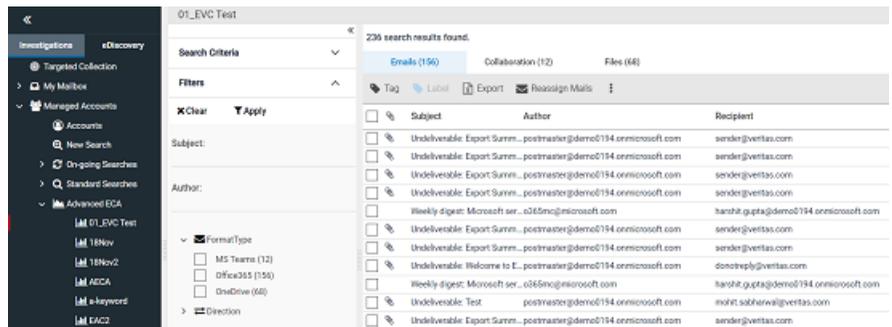
## Exporting emails from Advanced ECA search

To export emails from Advanced ECA search

- 1 On the **Investigations** tab, select **Managed Accounts > Advanced ECA**.
- 2 Select the Advanced ECA search in which you want to filter the records and export the required emails from the search.

The search result opens in the right pane.

- 3 Set the filter options and click **Apply** to view the filtered items.



- 4 In the right pane, select the emails you want to export.
- 5 Click **Export**, and do any of the following:
  - Click **Export current page** to export emails that are available on the current page.
  - Click **Export selected emails** to export all the selected emails from the search.
  - Click **Export all emails** to export all the emails available in the search.

236 search results found.

Emails (156) Collaboration (12) Files (68)

Tag Label Export Reassign Mails

	Subject		Recipient	Date
<input type="checkbox"/>	Undeliverable: Export current page	no0194.onmicrosoft.com	sender@veritas.com	11/23/2021 2:14:00 AM
<input type="checkbox"/>	Undeliverable: Export selected emails	no0194.onmicrosoft.com	sender@veritas.com	11/22/2021 10:48:00 PM
<input type="checkbox"/>	Undeliverable: Export all emails	no0194.onmicrosoft.com	sender@veritas.com	11/22/2021 10:48:00 PM
<input type="checkbox"/>	Undeliverable: Export Summary: postmaster@demo0194.onmicrosoft.com	no0194.onmicrosoft.com	sender@veritas.com	11/22/2021 10:46:00 PM
<input type="checkbox"/>	Weekly digest: Microsoft servi...o365mc@microsoft.com	no0194.onmicrosoft.com	harshit.gupta@demo0194.onmicrosoft.com	11/21/2021 8:53:00 PM
<input checked="" type="checkbox"/>	Undeliverable: Export Summar...postmaster@demo0194.onmicrosoft.com	no0194.onmicrosoft.com	sender@veritas.com	11/18/2021 2:40:00 AM
<input checked="" type="checkbox"/>	Undeliverable: Export Summar...postmaster@demo0194.onmicrosoft.com	no0194.onmicrosoft.com	sender@veritas.com	11/17/2021 10:11:00 AM
<input type="checkbox"/>	Undeliverable: Welcome to Ent...postmaster@demo0194.onmicrosoft.com	no0194.onmicrosoft.com	donotreply@veritas.com	11/16/2021 10:15:00 PM
<input type="checkbox"/>	Weekly digest: Microsoft servi...o365mc@microsoft.com	no0194.onmicrosoft.com	harshit.gupta@demo0194.onmicrosoft.com	11/14/2021 8:44:00 PM
<input type="checkbox"/>	Undeliverable: Test	no0194.onmicrosoft.com	postmaster@demo0194.onmicrosoft.com	11/11/2021 6:45:00 AM
<input type="checkbox"/>	Undeliverable: Export Summar...postmaster@demo0194.onmicrosoft.com	no0194.onmicrosoft.com	sender@veritas.com	11/11/2021 12:21:00 AM

6 In the **Export Options** dialog box, do the following:

**Export Options**
✕

You have selected 2 items of approximately 341 KB size to download.

Please select additional export options:

**Message Format** PST ▾

**Include Journaling Envelope**

**Enable AES-256 Encryption**

**Export Name**

**Export Password**

**Confirm Password**

**Share Export** Select Admin(s) ▾

Your download will be available as a single or multiple file segments.

Cancel
Export

**Message Format**

Select the appropriate message format. By default, the PST format is selected. The available message formats are:

- Clearwell
- EML
- EML with EDRM
- PST with EDRM
- MSG with EDRM
- FTI-RingTail
- EDRM Only
- PST
- OriginalEDRM

If you select this option, the exported file includes emails in both MSG and EML formats, allowing you to work with the emails in the format that best suits your needs. Besides this, the exported file includes additional files, namely - *edrmXML.xml* and *HTMLReport.html* in their original formats. These files facilitates a smooth transfer of electronically stored information (ESI) between different software programs during the electronic discovery process.

- Original

If you select this option, the exported file includes emails in both MSG and EML formats, allowing you to work with the emails in the format that best suits your needs.

**Note:** The *OriginalEDRM* and *Original* message formats are available to the users that are listed in the

**Configuration\_Overriden** table in the Veritas Alta Archiving database. If you want to avail these options in the **Message Format** drop-down field, contact Veritas support.

**Include Journaling Envelope**

Select this option to include journaling envelopes, which contain information about email recipients such as distribution lists.

**Enable AES-256 Encryption**

Select this check-box if you want to secure the access of the downloaded export batch.

**Export Name**

Provide the name for the batch you want to export. By default, it takes the Search Name. You can change it if required.

**Export Password**

Enter the password that you want end user to provide when they access this exported batch of messages.

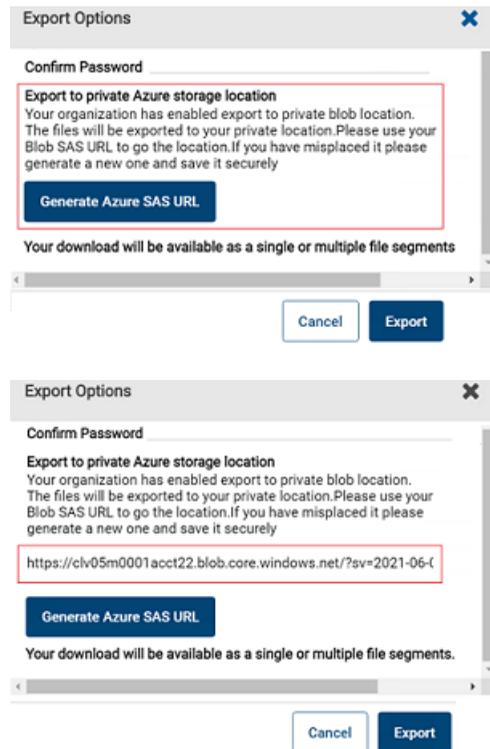
**Confirm Password**

Repeat the same password for confirmation.

### Generate Azure SAS URL

**Note:** Users can see this button only if the **Export to Azure private storage location** feature in the Veritas Alta View Compliance and Governance Management Console is enabled for them. Users can export items to their private Azure Blob storage location.

Click **Generate Azure SAS URL** to get the Azure Blob SAS URL to access the location and save it for future use.



For security reasons, the application does not show this URL the next time. However, if the SAS URL is misplaced for any reason, click **Generate Azure SAS URL** again to generate a new SAS URL and save it securely.

After you click **Export** on the **Export Options** dialog box, all the selected items are exported to the Azure private storage location. You can use Microsoft Storage Explorer to access the exported items.

**Share Export**

Click **Select Admin** to choose the recipients of this batch export and click **Update**.

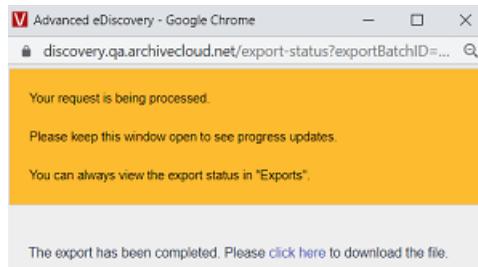
**Note:** You need to manually share the Export Password with the administrators and follow all the security specific rules of the organization.

**7 Click Export.**

---

**Note:** The exported batch can either gets downloaded as a single or multiple file segments.

---



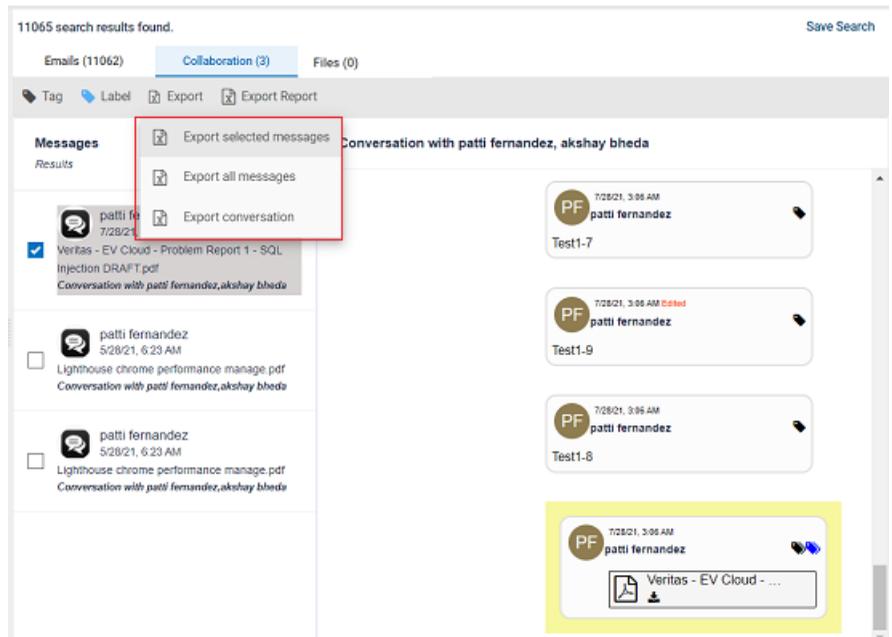
- 8 Click **Click here** to download the exported batch of messages.
- 9 To confirm the status of batch export, on the **Investigations** tab, select **Exports**, and search this export batch name.

## Exporting collaboration messages from Advanced ECA search

### To export collaboration messages from Advanced ECA search

- 1 On the **Investigations** tab, select **Managed Accounts > Advanced ECA**.
- 2 Select the Advanced ECA search in which you want to filter the records and export the required collaboration messages from the search.  
 The search result opens in the right pane.
- 3 Set the filter options and click **Apply** to view the filtered items.
- 4 In the right pane, on the **Collaboration** tab, select the messages you want to export.
- 5 Click **Export**, and do any of the following:

- Click **Export selected messages** to export all the selected messages from the search.
- Click **Export all messages** to export all the messages available in the Advanced ECA search.
- Click **Export conversation** to export all the conversations for a selected message within a user specified date range.  
 It helps you to understand the context of the conversation for review purpose.



6 In the **Export Options** dialog box, do the following:

**Export Options**
✕

You have selected 2 item(s).

Please select additional export options:

**Message Format** JSON ▼

**Enable AES-256 Encryption**

**Export Name** 01\_EVC Test

**Export Password**

**Confirm Password**

**Share Export** 
Select Admin(s)
⚠

Your download will be available as a single or multiple file segments.

Cancel
Export

**Message Format**

The available message formats are:

- JSON
- EDRM Only

Select the appropriate message format to export the batch. By default, it is JSON.

**Enable AES-256 Encryption**

Select this check-box if you want to secure the access of the downloaded export batch.

**Export Name**

Provide the name for the batch you want to export. By default, it takes the Search Name. You can change it if required.

**Export Password**

Enter the password that you want end user to provide when they access this exported batch of messages.

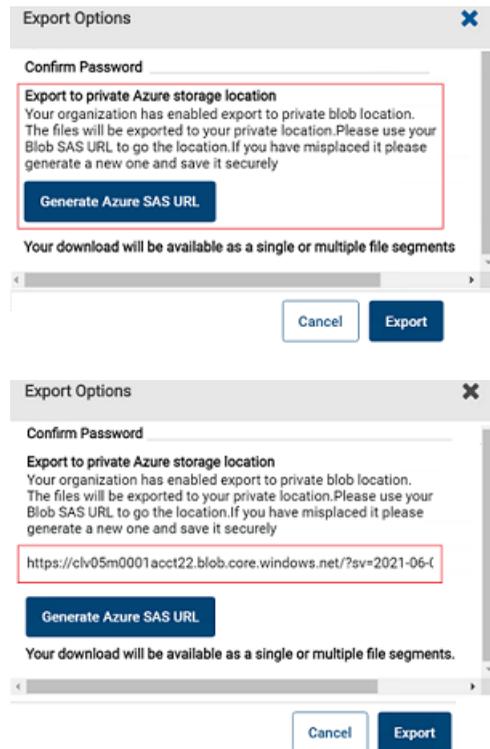
**Confirm Password**

Repeat the same password for confirmation.

**Generate Azure SAS URL**

**Note:** Users can see this button only if the **Export to Azure private storage location** feature in the Veritas Alta View Compliance and Governance Management Console is enabled for them. Users can export items to their private Azure Blob storage location.

Click **Generate Azure SAS URL** to get the Azure Blob SAS URL to access the location and save it for future use.



For security reasons, the application does not show this URL the next time. However, if the SAS URL is misplaced for any reason, click **Generate Azure SAS URL** again to generate a new SAS URL and save it securely.

After you click **Export** on the **Export Options** dialog box, all the selected items are exported to the Azure private storage location. You can use Microsoft Storage Explorer to access the exported items.

**Share Export**

Click **Select Admin** to choose the recipients of this batch export and click **Update**.

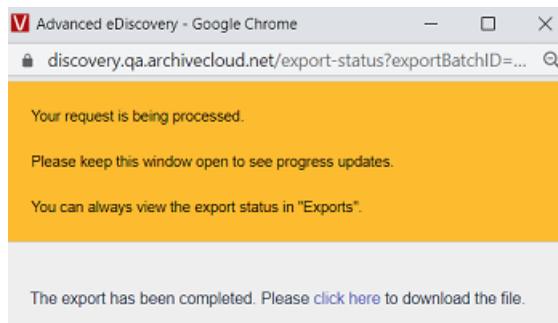
**Note:** You need to manually share the Export Password with the administrators and follow all the security specific rules of the organization.

**7 Click Export.**

---

**Note:** The exported batch can either gets downloaded as a single or multiple file segments.

---



- 8** Click **Click here** to download the exported batch of messages.
- 9** To confirm the status of batch export, on the **Investigations** tab, select **Exports**, and search this export batch name.

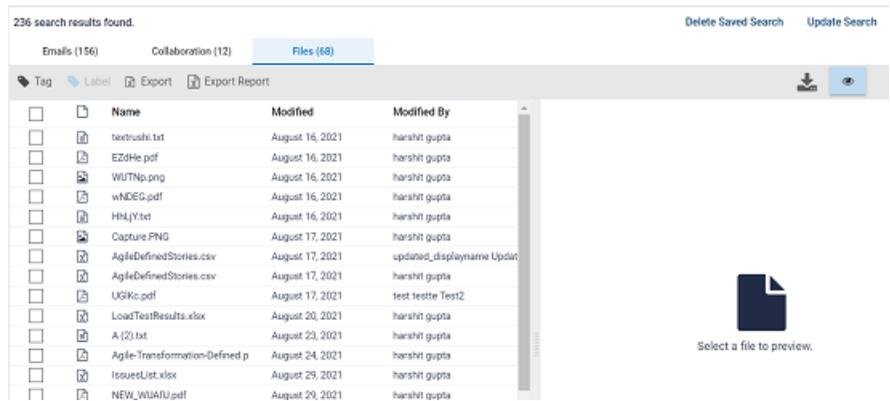
## Exporting files from Advanced ECA search

### To export files from Advanced ECA search

- 1** On the **Investigations** tab, select **Managed Accounts > Advanced ECA**.
- 2** Select the Advanced ECA search in which you want to filter the records and export the required files from the search.

The search result opens in the right pane.

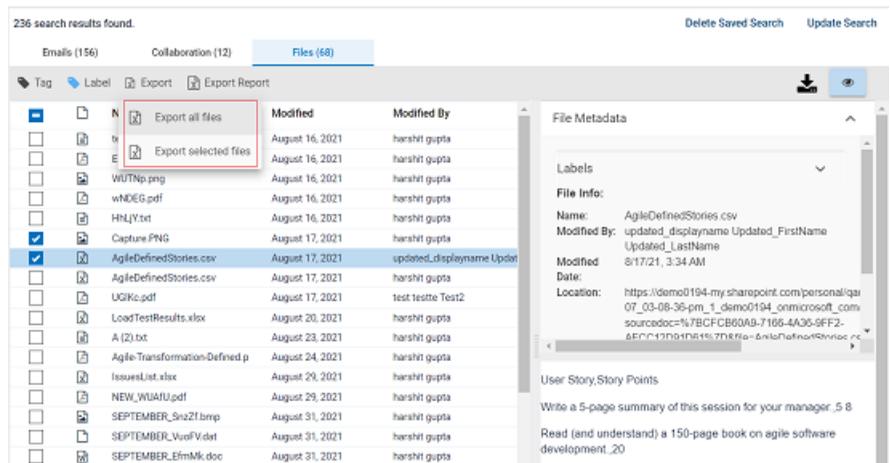
3 Set the filter options and click **Apply** to view the filtered files.



4 Select the files you want to export.

5 Click **Export**, and do any of the following:

- Click **Export selected files** to export all the selected files from the search.
- Click **Export all files** to export all the files available in the Advanced ECA search.



6 In the **Export Options** dialog box, do the following:

**Export Options**
✕

You have selected 2 item(s).

Please select additional export options:

**Message Format** JSON ▼

**Enable AES-256 Encryption**

**Export Name** 01\_EVC Test

**Export Password**

**Confirm Password**

**Share Export** Select Admin(s) ▼

Your download will be available as a single or multiple file segments.

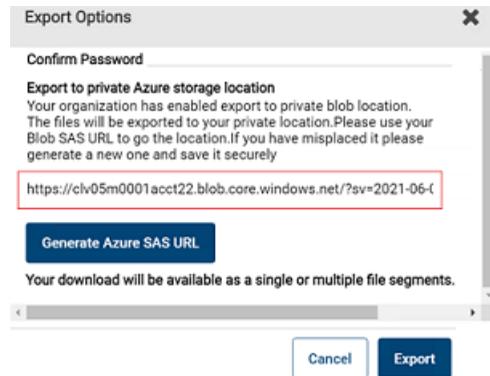
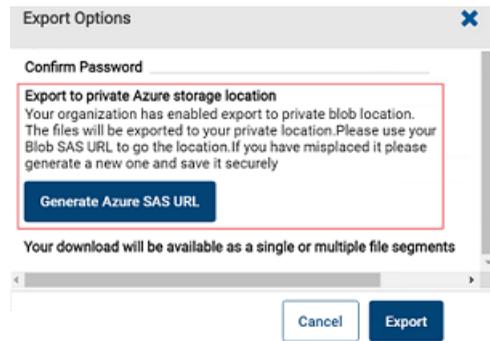
Cancel
Export

- Message Format** The available message formats are:
- JSON
  - EDRM Only
- Select the appropriate message format to export the batch. By default, it is JSON.
- Enable AES-256 Encryption** Select this check-box if you want to secure the access of the downloaded export batch.
- Export Name** Provide the name for the batch you want to export. By default, it takes the Search Name. You can change it if required.
- Export Password** Enter the password that you want end user to provide when they access this exported batch of messages.
- Confirm Password** Repeat the same password for confirmation.

### Generate Azure SAS URL

**Note:** Users can see this button only if the **Export to Azure private storage location** feature in the Veritas Alta View Compliance and Governance Management Console is enabled for them. Users can export items to their private Azure Blob storage location.

Click **Generate Azure SAS URL** to get the Azure Blob SAS URL to access the location and save it for future use.



For security reasons, the application does not show this URL the next time. However, if the SAS URL is misplaced for any reason, click **Generate Azure SAS URL** again to generate a new SAS URL and save it securely.

After you click **Export** on the **Export Options** dialog box, all the selected items are exported to the Azure private storage location. You can use Microsoft Storage Explorer to access the exported items.

**Share Export**

Click **Select Admin** to choose the recipients of this batch export and click **Update**.

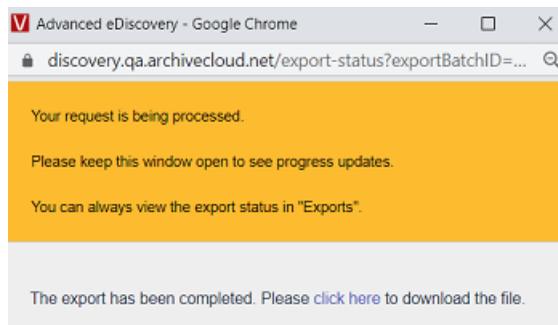
**Note:** You need to manually share the Export Password with the administrators and follow all the security specific rules of the organization.

**7** Click **Export**.

---

**Note:** The exported batch can either gets downloaded as a single or multiple file segments.

---



- 8** Click **Click here** to download the exported batch of messages.
- 9** To confirm the status of batch export, on the **Investigations** tab, select **Exports**, and search this export batch name.

## Exporting an Advanced ECA search summary report

This section describes the exporting the summary report for emails, collaboration messages, and files.

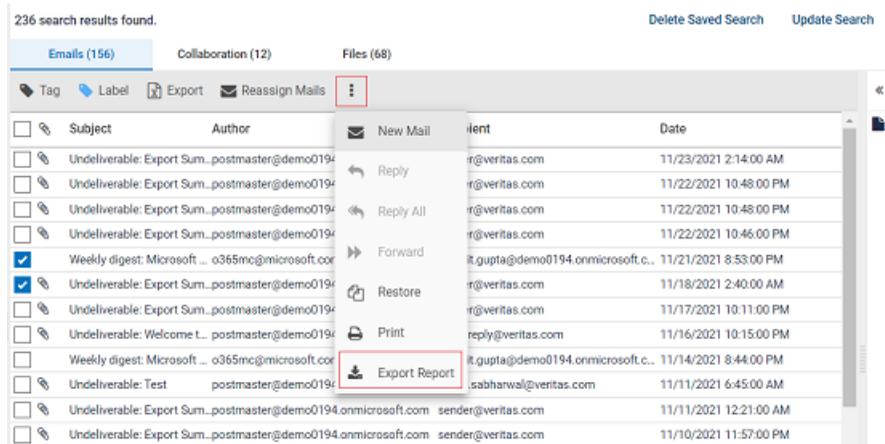
## Exporting a search summary report for emails

### To export an Advanced ECA search summary report for emails

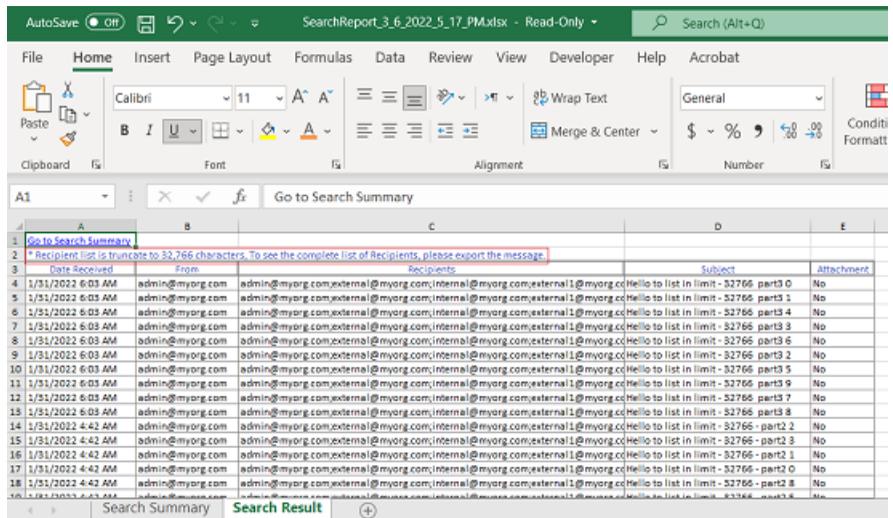
- 1** On the **Investigations** tab, select **Managed Accounts > Advanced ECA**.
- 2** Select the Advanced ECA search for which you want to export the summary report.

The search result opens in the right pane.

3 On the **Emails** tab, click the **More Actions** icon, and click **Export Report**.



The application downloads the summary report (.xlsx) of the emails within the Advanced ECA search as a zipped (.zip) folder. A sample report is shown below. The report comprises of two sheets.



**Note:** The **Search Summary** sheet displays details such as Search Parameters and Custodians.

The **Search Result** sheet displays details such as Date Received, From, Recipients, Subject, and Attachments. The recipient column in this summary

report includes recipients mentioned in the To, CC, and BCC fields. If the list of recipients is longer than 32766 characters, the application truncates the list. The report displays a note that - *Recipient list is truncate to 32,766 characters, To see the complete list of Recipients, please export the message.* In such scenario, to view the complete list of recipients, you need to export the individual message.

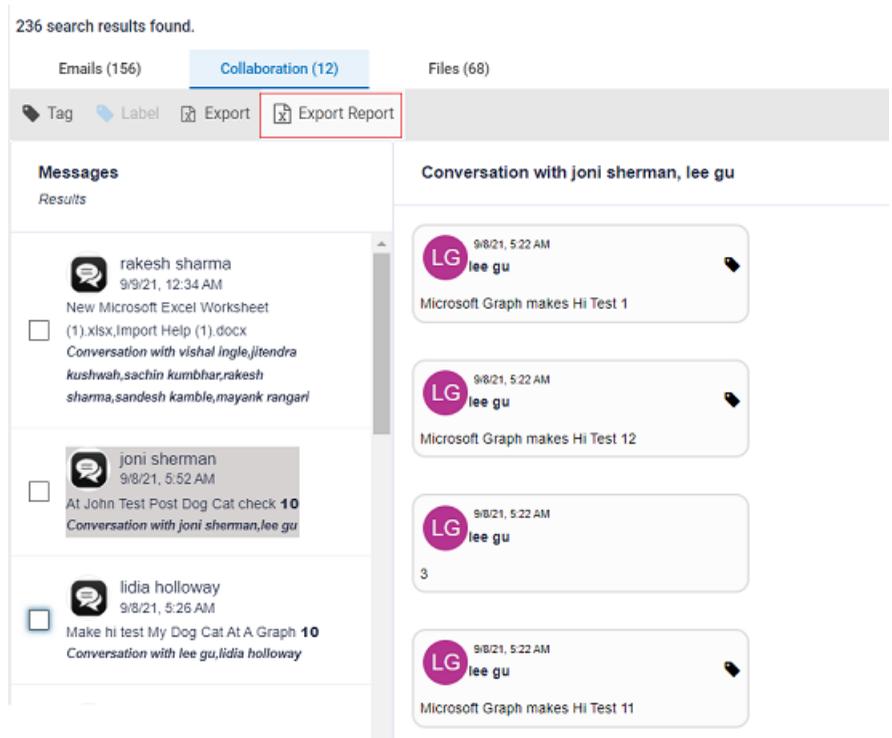
---

## **Exporting summary report for collaboration messages**

### **To export an Advanced ECA search summary report for collaboration messages**

- 1** Select the required search under the Research Sets or the Review Sets node.
- 2** On the **Investigations** tab, select **Managed Accounts > Advanced ECA**.

- 3 Select the search for which you want to export the summary report.  
 The search result opens in the right pane.
- 4 On the **Collaboration** tab, and click **Export Report**.



The application downloads the summary report (.xlsx) of the collaboration messages within the search as a zipped (.zip) folder.

## Exporting summary report for files

To export an Advanced ECA search summary report for files

- 1 On the **Investigations** tab, select **Managed Accounts > Advanced ECA**.
- 2 Select the Advanced ECA search for which you want to export the summary report.

The search result opens in the right pane.

- 3 On the **Files** tab, and click **Export Report**.

236 search results found. Delete S

Emails (156) Collaboration (12) **Files (68)**

Tag Label Export **Export Report**

<input type="checkbox"/>	Name	Modified	Modified By
<input type="checkbox"/>	texttrushi.txt	August 16, 2021	harshit gupta
<input type="checkbox"/>	EZdHe.pdf	August 16, 2021	harshit gupta
<input type="checkbox"/>	WUTNp.png	August 16, 2021	harshit gupta
<input type="checkbox"/>	wNDEG.pdf	August 16, 2021	harshit gupta
<input type="checkbox"/>	HhLjY.txt	August 16, 2021	harshit gupta
<input type="checkbox"/>	Capture.PNG	August 17, 2021	harshit gupta
<input type="checkbox"/>	AgileDefinedStories.csv	August 17, 2021	updated_displayname Updat
<input type="checkbox"/>	AgileDefinedStories.csv	August 17, 2021	harshit gupta
<input type="checkbox"/>	UGIkC.pdf	August 17, 2021	test testte Test2
<input type="checkbox"/>	LoadTestResults.xlsx	August 20, 2021	harshit gupta
<input type="checkbox"/>	A (2).txt	August 23, 2021	harshit gupta
<input type="checkbox"/>	Agile-Transformation-Defined.p	August 24, 2021	harshit gupta
<input type="checkbox"/>	IssuesList.xlsx	August 29, 2021	harshit gupta

File Metadata

Labels

**File Info:**

Name: AgileDefinedStories.c  
 Modified By: updated\_displaynam  
 Updated\_LastName  
 Modified: 8/17/21, 3:34 AM  
 Date:  
 Location: https://demo0194-my  
 07\_03-08-36-pm\_1\_c  
 sourcedoc=%7BCFC  
 ΔTTC1204164447F

User Story,Story Points

The application downloads the summary report (.xlsx) of the files within the Advanced ECA search as a zipped (.zip) folder.

## Reassigning emails from the Advanced ECA search

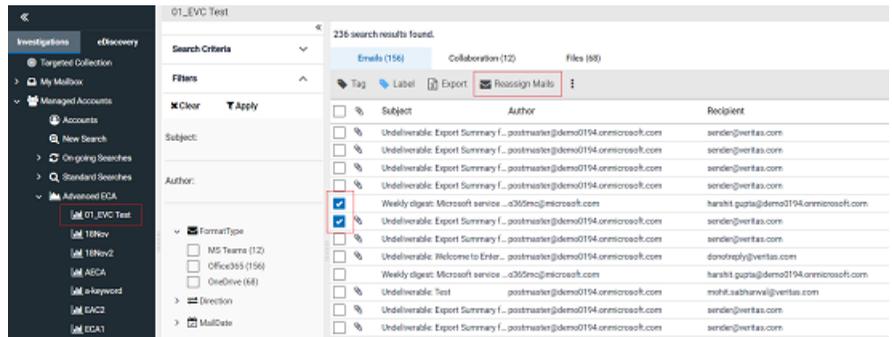
To reassign emails from the Advanced ECA search

- 1 On the **Investigations** tab, select **Managed Accounts > Advanced ECA**.
- 2 Select the Advanced ECA search in which you want to filter the records for reassigning to specific accounts.

The search result opens in the right pane.

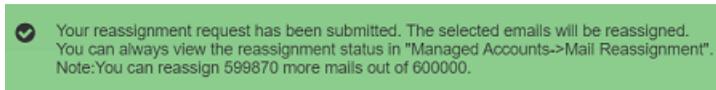
- 3 Set the filter options and click **Apply** to view the filtered items.

- In the right pane, select the items you want to reassign.



- Click **Reassign Mails**, and do the following:
  - To reassign selected emails, click **Reassign selected emails**.
  - To reassign emails displayed on one page, click **Reassign emails in current page**.

The application displays the sample message as follows:

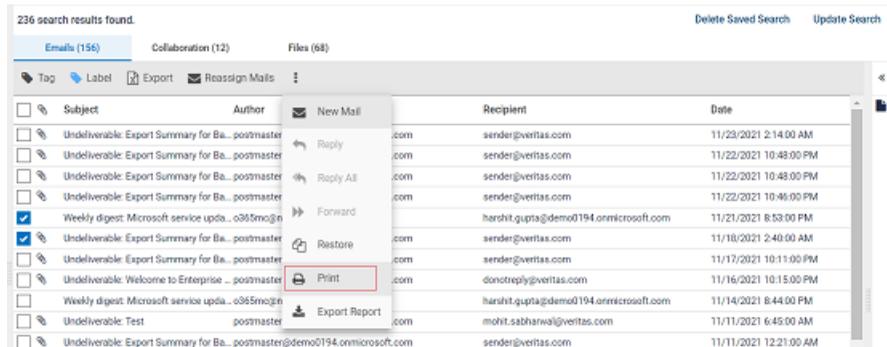


## Printing the selected Advanced ECA searched items

### To print the selected Advanced ECA searched items

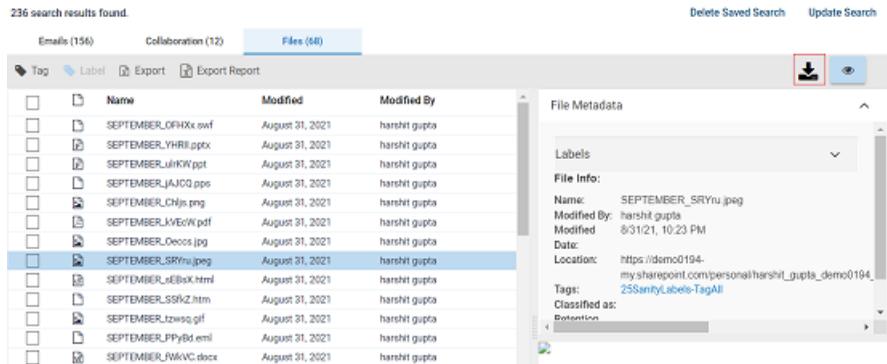
- On the **Investigations** tab, select **Managed Accounts > Advanced ECA**.
- Select the Advanced ECA search in which you want to filter the records for printing.  
The search result opens in the right pane.
- Set the filter options and click **Apply** to view the filtered items.

- To print emails, on the **Emails** tab, select the items you want to print. Click the **More Actions** icon, and click **Print**.



A separate dialog box appears and displays the metadata and the content of the items ready for printing.

- To print files, on the **Files** tab, select the file you want to print. Click the **Download** icon to save that file on your local computer, and then print it.



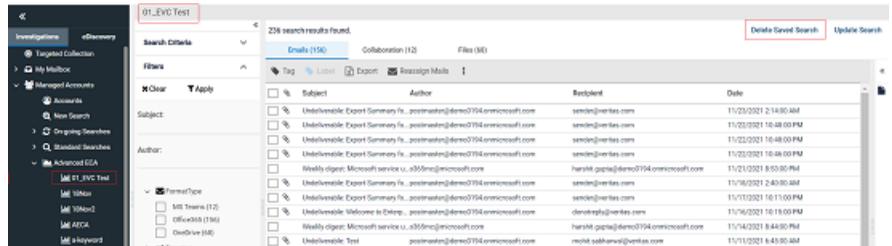
- Ensure that the content is the same you want to print. Click **Print** and save the document as PDF.

## Deleting an Advanced ECA search

To delete an Advanced ECA search

- 1 On the **Investigations** tab, select **Managed Accounts > Advanced ECA**.
- 2 Select the Advanced ECA search that you want to delete.

The search result opens in the right pane.



- 3 Click **Delete Saved Search**.

The application prompts you to confirm that you want to perform the operation.

- 4 Click **Yes** to complete the operation or click **No** to cancel it.

The application deletes the search from the Advanced ECA node.

## About Mail Reassignment

On the **Investigations** tab, the **Mail Reassignment** node is available to those users with **Administrator** or **Reviewer** role privileges. Mail reassignment is used to send already processed emails back to go through the process of parsing, mail transfer, and sender-recipient mail address mapping.

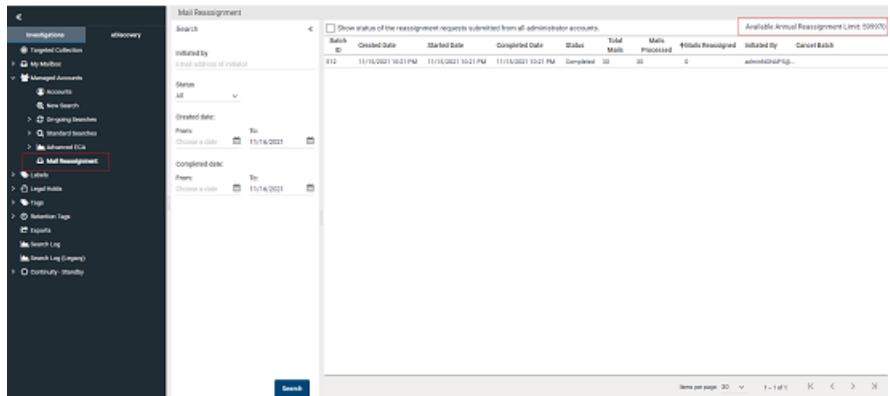
Emails are usually mapped to the unassigned legacy account because the domain or account has not been provided for email archiving or searching. Later, when such users are added as archive accounts, these previously mapped emails are required to assign again to map the mail addresses. After successful reassignment of such emails, new users can search and view these emails.

## Reassigning emails

Every company has an unassigned legacy account. New users from the company cannot search or view the emails that were sent to their account before it was created. All such mails that do not find appropriate recipient of the mail goes to unassigned legacy account.

To enable such users to receive their previously assigned emails, you, as an administrator, need to reassign such emails to them. After you submit email batch for reassignment, application resends these emails to corresponding user accounts. All the new users can then search and view their emails.

You can reassign emails from the unassigned legacy accounts, on-going and standard searches, holds, and tags. You can select maximum 300 emails in one batch for reassignment. If there are more than 300 emails in the unassigned legacy account, you need to reassign emails in multiple batches. The maximum annual limit of mail reassignment is 600000 mails per customer, whereas the daily limit is 4500 per day per customer. When customers submit a batch for reassignment, customers can view a temporary notification (that fades out automatically) about their available reassignment limit. Alternatively, customers can check their mail reassignment limits on the **Mail Reassignment** node.

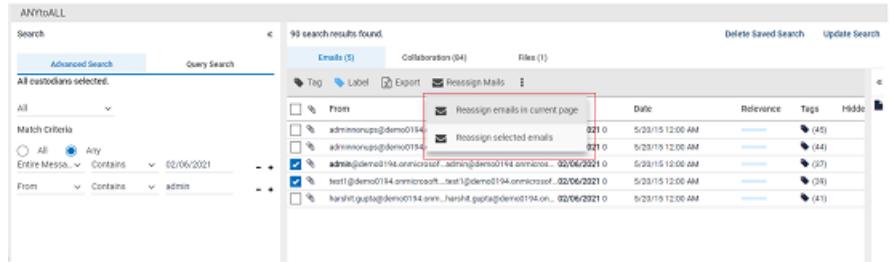


When customers use 90 percent of their annual mail reassignment limit, they receive an alert email.

### To reassign emails

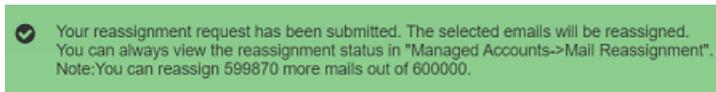
- 1 On the **Investigations** tab, search for and select emails from one of the following locations:
  - Go to **Managed Accounts > Accounts**.
  - Go to **Managed Accounts > On-going Searches**.
  - Go to **Managed Accounts > Standard Searches**.
  - Go to **Holds**.

- Go to **Tags**.
- 2 Search for and select emails from the required unassigned legacy account, on-going and standard searches, hold, and the tags.



- 3 To reassign up to 30, 50, 100, and 300 emails in one batch, select number of emails you want to view on one page, and click the **Reassign current page** icon.
- 4 Click **Reassign Mails**, and do the following:
  - To reassign selected emails, click **Reassign selected emails**.
  - To reassign emails displayed on one page, click **Reassign emails in current page**.

The application displays the sample message as follows:



## Viewing email reassignment status

After you submit a batch for email reassignment, you need to know the status of every batch. There are four statuses, namely Queued, In-progress, Completed, and Failed.

### To view email reassignment status

- 1 On the **Investigations** tab, select **Managed Accounts > Mail Reassignment**.
- 2 To view the status of email reassignment batches initiated by multiple admin accounts of the same company, select the **Show status of the reassignment requests submitted from all administrator accounts** check-box.

- 3 Use the **Advanced Search** option to search for the batch you want to check the status.
- 4 Select the batch.

The **Status** column displays the current reassignment status of the batch.

The **Reassignment Details** pane displays the Batch ID, name of the email reassignment initiator, total emails in the batch, successfully reassigned emails from the batch, date and time of the reassignment activity.

---

**Note:** If the batch status is either Queued or In-progress, then the **Cancel** option remains enabled. You can click the **Cancel** option to abort the reassignment activity. If the batch status is either Completed or Failed, then the **Cancel** option remains disabled. You cannot click the **Cancel** option to abort the reassignment activity.

---

## Canceling the email reassignment activity

After you submit a batch for email reassignment, you need to know the status of every batch. There are four statuses, namely Queued, In-progress, Completed, and Failed. You can cancel the email reassignment activity only when the batch status is Queued or In-progress. You cannot cancel the reassignment for the Completed and Failed batches. You can cancel one batch at a time.

### To cancel email reassignment activity

- 1 On the **Investigations** tab, select **Managed Accounts > Mail Reassignment**.
- 2 Use the **Advanced Search** option to search for the batch you want to cancel.
- 3 Select the batch whose status is either Queued or In-progress.
- 4 Under **Reassignment Details**, ensure that the **Cancel** option is enabled.
- 5 Click **Cancel**.

## Generating a Mail Reassignment status report

If you want to share the email reassignment status report, you need to generate it from Veritas Alta View Compliance and Governance Management Console. You must have an administrator role to access the reports section.

Refer to the **Creating a Mail Reassignment status report** section in the Management Console Help.

## Viewing mail reassignment notifications and status reports

After performing the mail reassignment, the application notifies the user (who initiated the reassignment task) about the status of the mail reassignment task and the errors that occurred during reassignment. Email notifications are sent only for the batches that are completed.

### To view a notification

- 1 On the **Investigations** tab, select **My Mailbox > Mailbox**.
- 2 Click **Inbox** to view the list of emails regarding mail reassignment batch statuses.
- 3 Search for and select the emails for which you want to see the mail reassignment statuses.

---

**Note:** Perform advanced search or query search to get the expected items. See [“Performing Advanced Search and Query Search”](#) on page 312.

---

- 4 Click the email to view details in the preview pane in the right side of the page.
  - The **Subject** of the notification email shows the status of mail reassignment batch.

- The **Attachment** shows the link to download the batch status summary report. The report is in the Microsoft Excel format and includes the **Status Report** and the **Error Report** sheets.
- 5 Click the link to download the report on your local computer.

A sample **Status Report** sheet is shown as:

The screenshot shows an Excel spreadsheet with the following data:

Assignee	Account	Total	Processed	Reassigned	Failed
admin@myorg.com		2	2	2	0
admins@myorg.com		2	2	2	0
admins01@myorg.com		2	2	2	0

A sample **Error Report** sheet is shown as below. It provides the reason of the failure or error occurred during email reassignment.

The screenshot shows an Excel spreadsheet with the following data:

Account	Reason

## About labels

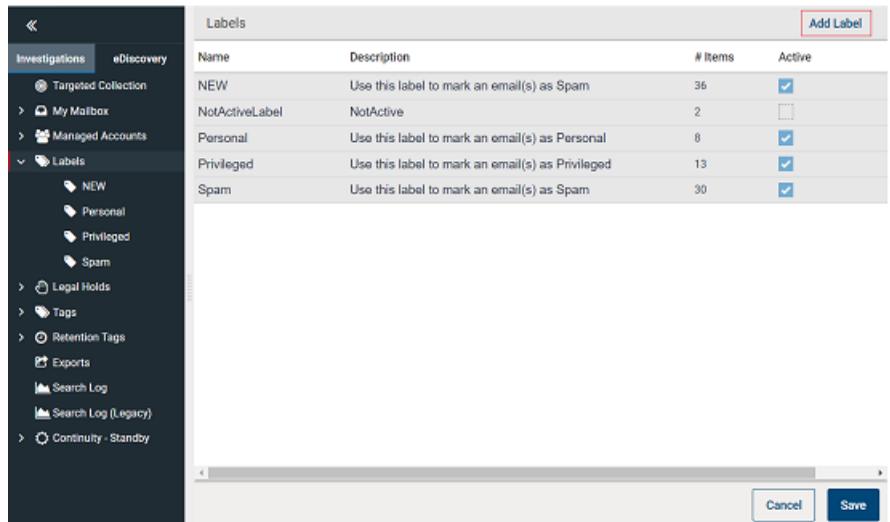
The eDiscovery Administrators can use the default labels or create customized labels to suit your company's processes and requirements. Labels are applied to

emails typically to mark them as exempt from the review process. The default labels are: Spam, Privileged, and Personal.

## Creating a label

### To create a new label

- 1 On the **Investigations** tab, in the left navigation pane, select **Labels**.
- 2 Click **Add**.



- 3 Specify the following details:

- Name** Specify a unique name for the label.
- Description** Optionally enter a description for the label.
- # Emails** Displays number of items to which this tag is applied. If this tag is not applied, the number of items shown as zero.
- Action** Click **View Emails** to view items with the corresponding label.
- Active** Select the **Active** check box for the label if you want to display this label while reviewers assign labels to items. Clear the check box for any labels that you want to hide.

- 4 Click **Save Label**.

# About legal holds

This section describes the tasks that a user can perform with the legal holds.

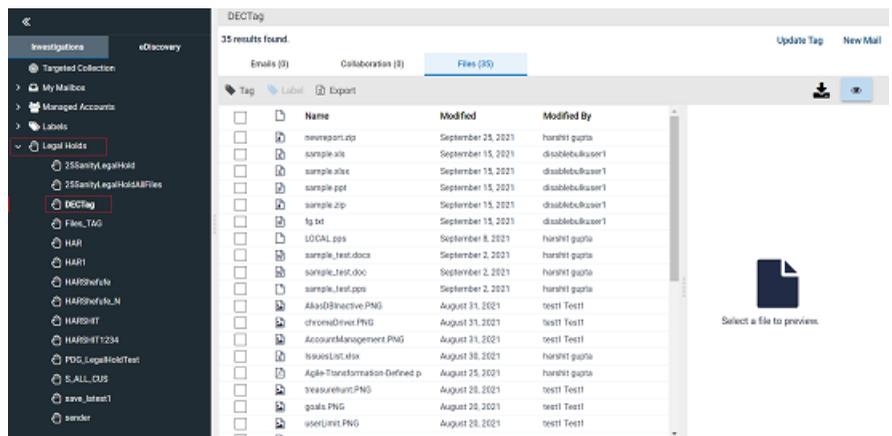
## Viewing legally hold items

While you tag the items, collaboration messages, and files, you can apply legal hold on the selected items. You can view those items under the **Legal holds** node.

### To view legally hold items

- 1 In the **Investigation** tab, select **Legal Holds**.
- 2 Select the tag name.

In the details pane, the application displays the items that are tagged and marked as legal hold.



- 3 Select one item at a time to preview its details in the preview pane.
- 4 Click the **Native View** icon to view the item in the original format.
- 5 To download the item, click the **Download** icon.

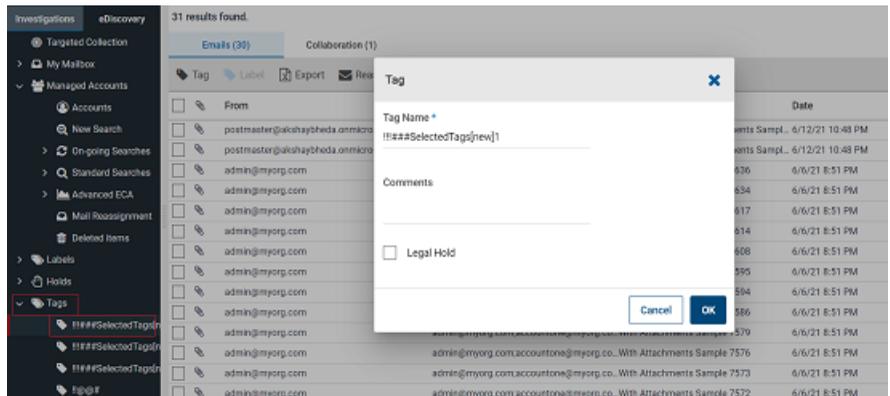
# About Tags

This section describes the tasks that a user can perform with the tags.

## Updating tags

### To update a tag

- 1 On the **Investigations** tab, select **Tags**.
- 2 Select the tag you want to update.  
 The application displays all items to which the selected tag is applied.
- 3 Click **Update Tag**.



- 4 In the **Tag** dialog box, do the following:
  - In the **Tag Name** field, modify the existing tag name, if required.
  - In the **Comments** field, specify the reason to update the tag.
  - To apply legal hold on the items with this tag, select the **Legal Hold** check box.
- 5 Click **OK** to complete the operation or click **Cancel** to abort updating task.

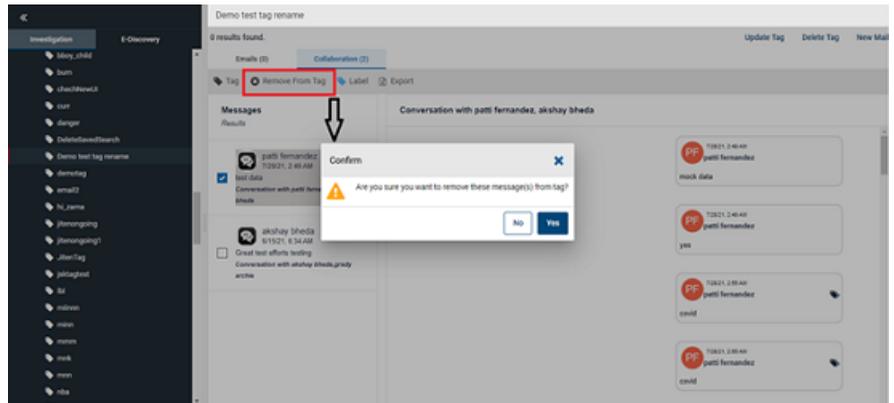
## Removing items from tags

### To remove items from tags

- 1 On the **Investigations** tab, select **Tags**.
- 2 Select the tag to view all items to which the selected tag is applied.
- 3 In the **Collaboration** tab, select the message which tag you want to remove.

**4** Click **Remove from Tag**.

The application prompts you to confirm that you want to perform the operation.



**5** Click **Yes** to complete the operation or click **No** to cancel it.

## Deleting tags

### To delete a tag

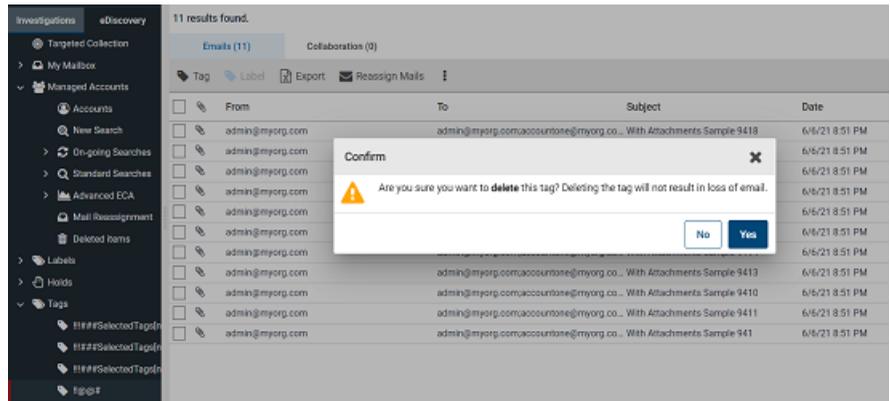
**1** On the **Investigations** tab, select **Tags**.

**2** Select the tag you want to delete.

The application displays all items to which the selected tag is applied.

**3 Click Delete Tag.**

The application prompts you to confirm that you want to perform the operation.



**4 Click Yes to complete the operation or click No to cancel it.**

## About search log

The search log provides you with the records of searches conducted in the **Investigation** and **eDiscovery** tabs, for auditing purpose. However, searches made under the **Advanced ECA** node in the Investigation tab and the **Review Sets** node in the eDiscovery tab are excluded from the log. It covers details of searches for emails, collaboration messages, and files, with separate logs for each search type.

The **Advanced Search** functionality of the **Search Log** node enables you to filter the record based on simple keyword values, user, or time period, enabling you to view specific records as needed. You can export search log records for a maximum duration of one year from the current date.

## Viewing and exporting search log report

### To view and export search log report

- 1 On the **Investigations** tab, select **Search Log**.

The application displays the record of all the searches, except for the searches performed under the **Advanced ECA** node in the Investigation tab and the **Review Sets** node in the eDiscovery tab.

- 2 To filter the appropriate records from the entire log, expand the **Advanced Search** pane (if it is not expanded already), and do the following:

Search criteria            Type the specific keywords to be queried.

User                        Select all users or the required user.

Search Date                Select the duration of the report from the available options.

**Note:** The application allows exporting records of maximum one year. The **Export Report** option enables only if the selected data is within one year.

- 3 Ensure that the filtered result is as expected.
- 4 Click **Export Report**.

The report is downloaded to your local downloads folder for further analysis.

# Managing cases

This chapter includes the following topics:

- [About cases](#)
- [About case workflow summary: eDiscovery Administrator](#)
- [Creating case review statuses](#)
- [Creating cases](#)
- [Viewing case details](#)
- [Editing cases](#)
- [About searches in eDiscovery](#)
- [Applying tags to the searched items in cases](#)

## About cases

In Alta eDiscovery, an eDiscovery Administrator creates a case as a container that contains emails, collaboration messages, and files related to the case. Administrators and reviewers can perform a traceable examination on these items. Administrators can view all the cases in Alta eDiscovery, whereas reviewers can only view the cases to which they are assigned.

Cases are created and managed in the **eDiscovery** tab. When creating a case, the eDiscovery Administrator selects the user accounts (custodians) that the eDiscovery has to include. Within the case the eDiscovery Administrator can create and save the searches that find the custodian emails, messages, and files that may be pertinent to the case. The searches and review actions within a case are traceable.

---

**Note:** Cases can never be deleted from Alta eDiscovery. When a case is completed you can hide it from the cases list, but you cannot remove it.

---

Typically a case is set to place a legal hold on all the emails, messages, and files that are associated with it. The legal hold ensures that these items are retained in Veritas Alta Archiving, regardless of the company's email retention policies. These items remain on a legal hold until the reviewer or administrator removes the legal hold. Normally, the legal hold is removed for an item when a reviewer determines that it is not of interest to the case. Legal hold can also be applied to the results of individual searches.

When you save a search of a case, you can choose to save it as a Review Set, at which point you assign the search results to the reviewers of that for analysis. Multiple reviewers can interact and collaborate to review the search results to distribute the review work and expedite the discovery process. Once a search is saved as a Review Set it cannot be modified.

## About case workflow summary: eDiscovery Administrator

[Table 5-1](#) shows the steps that are required for an eDiscovery Administrator to create and manage a case.

**Table 5-1**      Process for an eDiscovery Administrator to set up a new case

Phase	Action	Description
Phase 1	Prepare the reviewers, labels, review status tags, and redaction reasons for the cases.	<ul style="list-style-type: none"> <li>■ Prepare the reviewers. The System Administrator can assign Veritas Alta Archiving accounts to the <b>Reviewer</b> and <b>Administrator</b> roles as required. See <a href="#">“About account roles and Alta eDiscovery”</a> on page 29.  <b>Note:</b> Take care in selecting users for the <b>Reviewer</b> role, since reviewers can see other employees' emails, messages, and files.</li> <li>■ Prepare the labels. You can use the default labels or create customized labels to suit your company's processes and requirements. Labels are applied to items typically to mark them as exempt from the review process. The default labels are: <b>Spam</b>, <b>Privileged</b>, and <b>Personal</b>. You can manage the labels from the <b>Investigations &gt; Labels</b> node. See <a href="#">“Creating a label”</a> on page 177.</li> <li>■ Prepare the review status tags. You can create review status tags and choose which are available when creating new cases. See <a href="#">“Creating case review statuses”</a> on page 186.</li> <li>■ Prepare the redaction reasons. You can create redaction reasons and choose which are available when creating cases. See <a href="#">“Adding redaction reasons”</a> on page 209.</li> </ul>
Phase 2	In <b>eDiscovery &gt; Cases</b> , add a new case.	<p>The steps to add a new case are:</p> <ul style="list-style-type: none"> <li>■ Provide a name, description, and expiry date.</li> <li>■ Apply legal hold for the case, if required.</li> <li>■ Select the user accounts (custodians) on which to perform the eDiscovery.</li> <li>■ Select one or more reviewers for the case.</li> <li>■ Select the review status tags to use with the case.</li> <li>■ Select redaction reasons to use with the case.</li> </ul> <p>See <a href="#">“Creating cases”</a> on page 187.</p>
Phase 3	Create a search.	<p>Use a search to find the data of interest. Run the search to check the results. The results of assigned searches determine the items that the reviewers can process further. Typically, the reviewers do not see any other items than these.</p> <p>See <a href="#">“Performing searches within cases”</a> on page 196.</p>
Phase 4	Apply tags and notes to the search items.	<p>Apply tags to items as required.</p> <p>See <a href="#">“Applying tags to emails”</a> on page 213.</p> <p>See <a href="#">“Adding notes to emails”</a> on page 223.</p>

**Table 5-1** Process for an eDiscovery Administrator to set up a new case  
*(continued)*

Phase	Action	Description
Phase 5	Save the search and assign it to a reviewer.	<p>Assign the required searches to the reviewers for analysis. You can divide the search results between multiple reviewers.</p> <p>Apply a search-level legal hold, if required.</p> <p>See <a href="#">“Saving searches in Review sets and Research sets”</a> on page 197.</p> <p>See <a href="#">“Assigning review sets to reviewers”</a> on page 200.</p> <p>See <a href="#">“Applying a search-level legal hold”</a> on page 200.</p>

## Creating case review statuses

The eDiscovery Administrators can customize the case review status tags if required, to reflect their internal workflow. You can hide or rename the supplied status tags, and you can create new status tags.

Review status tags cannot be edited or hidden once they are applied to one or more emails.

### To create the case review status

- 1 On the **eDiscovery** tab, select **Review Status**.
- 2 Click **Add Row**.
- 3 To customize a new status tag, do the following:
  - Provide a unique name and the description for the review status tag.
  - Select the **Is Active** check box for the status tags you want to display when creating a new case.
  - To hide the review status tag, clear the **Is Active** check boxes for respective statuses.
  - Select the **Is Default** column to indicate the tag status as default.

---

**Note:** You must specify at least two review status tags as default.

---

- 4 Click **Save**.

# Creating cases

The eDiscovery Administrators can create cases and select which custodians to associate with the case. Once a case is created, all items (emails, collaboration messages, and files) for the case can be placed on legal hold to ensure that the items are retained.

## To create a case

- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Click **Add Case**.

The **Add New Case** dialog box appears.

- 3 Under **Case Status**, specify the following details:

<b>Case Status</b>	Select the <i>Active</i> option.
<b>Legal Hold</b>	By default, this option is set to OFF.  Switch this field to ON or OFF to toggle the options whether to apply a case-level legal hold to case items.
<b>Number of custodians</b>	Displays number of custodians associated with the case.
<b>Number of Items</b>	Displays number of items associated with the case.
<b>Expiration Date</b>	Displays case expiration date.
<b>Number of Items on Legal Hold</b>	Displays number of items in a case that are on legal hold.

**4** Under **Case Details**, specify the following details:

<b>Apply Legal Hold</b>	Click <b>Yes</b> to toggle the option between Yes and No. The <b>Yes</b> option applies a case-level legal hold to items, and is the default value.  <b>Note:</b> This option keeps all items for the case on legal hold until the administrator removes the legal hold.
<b>Name</b>	Enter a unique name for the case.
<b>Description</b>	Optionally enter a description for the case.
<b>Expiration date</b>	Select <b>Never Expires</b> , or enter an expiration date for the case.  After the expiration date a case's status changes to inactive. An inactive case becomes read-only for reviewers, but all its associated data and any hold remains intact. The eDiscovery Administrator can revert an inactive case back to active status.
<b>Filing date</b>	Specify the case filing date.
<b>Case Type</b>	Specify the type of case.
<b>Department</b>	Provide the department details.
<b>Matter Number</b>	Provide the matter number.
<b>Court/Docket</b>	Provide the court and docket number.
<b>Additional Staff Members</b>	Provide the additional staff member names involved in the case.
<b>Case Notes</b>	Provide a note for a case, if required.

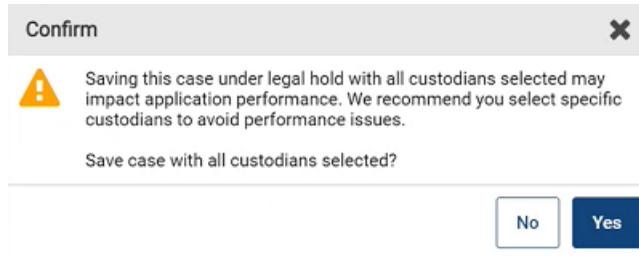
**5** Under **Custodians for Case**, do one of the following:

- Select **All Custodians** to include all the archive accounts as accounts that may be searched for this case.

---

**Note:** If under **Case Status**, the **Legal Hold** option is set to **ON**, and under **Custodians for Case**, you select the **All Custodians** option, the application displays the following message:

---



This alert message recommends you to select specific custodians instead of all custodians to avoid performance issues. However, if you are sure about selecting the **All Custodians** option, click **Yes**. Else, click **No** and select the **Select Custodians** option.

When you select the **All Custodians** option, the **Add Custodians** option remains disabled.

- Select **Select Custodians** to choose the archive accounts that you want to include for search. The **Add Custodians** option gets enabled. Click **Add Custodians** and select the required custodians, then click **Save**. The **Add/Remove Custodians** dialog box appears as shown in the sample image below.

**Add/Remove Custodians**
✕

Selected Custodians
▼

Manage Custodians
▲

Search...
🔍

Email Address	Last Name	First Name
<input type="checkbox"/> anim123@myorg.com	a	a
<input type="checkbox"/> a@myorg.com		a
<input type="checkbox"/> abhi123@myorg.com		abhi123
<input checked="" type="checkbox"/> abhi@myorg.com		Abhishek
<input checked="" type="checkbox"/> Automation_16627193...	Automation	account
<input type="checkbox"/> Automation_16627193...	Automation	account

Items per page: 30 ▼
1 – 30 of 282
⏪ ⏩

Cancel
Update

- Expand the **Selected Custodians** to view your selection. To remove the selected custodian, click the **Delete** icon beside it and then click **Update**.
  - Expand the **Manage Custodians** to search and select the available custodians across the pages and click **Update**.
- 6** Under **Reviewers for Case**, click **Add Reviewers** to choose the reviewers for this case, and then click **Save**.
  - 7** Under **Customizations**, select the review statuses that need be available to the reviewers when they review each message.

Under **Set Review Status to**, do any of the following:

- Select **Default** and click **View** to use the default list of review statuses in their default order.
- Select **Custom** and click **Choose Review Status Tags** to choose which review statuses are to be used with this case.

- 8** Under **Redaction Reasons**, select the redaction reasons that need to be available to the reviewers when they review each message.

Under **Set Redaction Reasons to**, do any of the following:

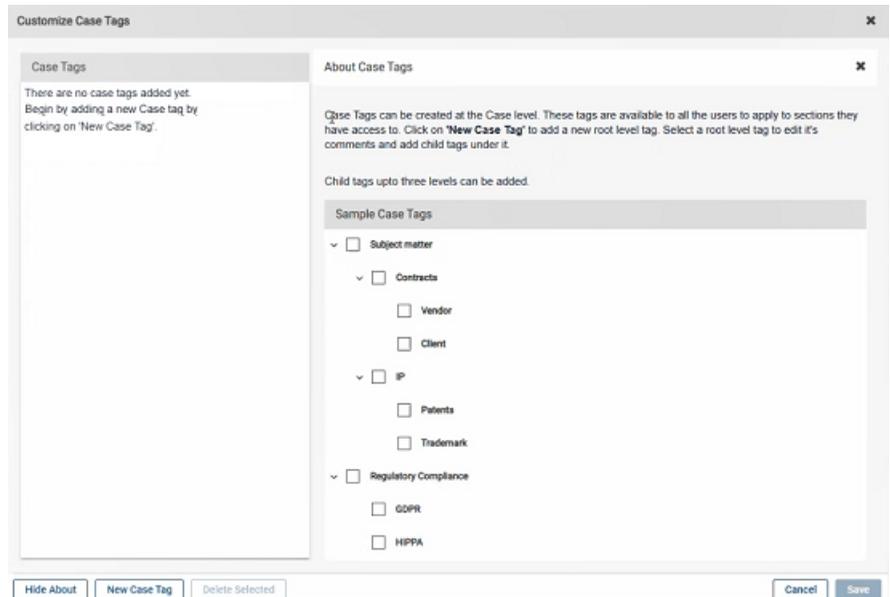
- Select **Default** and click **View** to preview the by default selected redaction reasons.
- Select **Custom** and click **Choose Redaction Reasons Status** to choose the redaction reasons to be used with this case. Then, click **View** to preview the selected redaction reasons.

- 9 Under **Case Tags**, customize tags for the case, if needed.



By default, it is set to **None**.

Select **Custom** > **Customize Case Tags** to add a case-specific tags.



Click **New Case Tag** to create a new tag. Provide a unique tag name and comments for this tag. If required, add child tags, and click **Done**.

---

**Note:** Under the parent tag, you can add tags up to three levels in the hierarchy. You can add a maximum of 10 child tags in a parent tag. Adding tags with same names under different parent is permitted. However, you cannot save a new tag with a duplicate name in the same window; you must save other identical tags individually first.

The **New Case Tag** functionality lets you create multiple tags simultaneously. While applying tags to the searched items, you can select multiple tags.

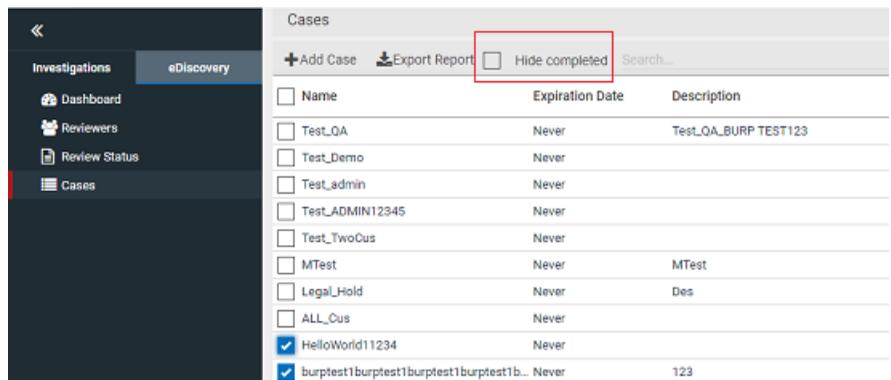
---

- 10 Click **Save Case** to create the case with your selected options.

## Viewing case details

### To view the details of a case

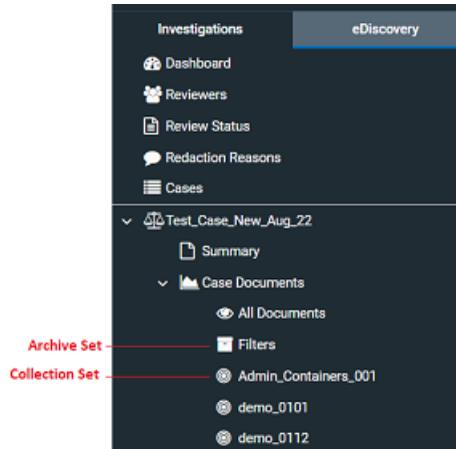
- 1 On the **eDiscovery** tab, select the **Cases** node to display a list of cases.  
 If you are a reviewer, Alta eDiscovery lists only those cases to which you have been assigned.
- 2 If you have the required permissions the **Hide Completed** check box is available above the case list. To list only the active cases, select the check box.



- 3 To view the details of a case, select a case from the Case List. A summary of the reviewers and custodians for the case appears below the list.

Under the **Cases** node in the left pane a **case\_name** node appears for the selected case. This node contains a number of sub-nodes that provide details of the case as follows. The available options depend on your permissions:

- **case\_name**: Click this node to display the **Edit Case** pane. If you have the required permissions you can edit the details of the case in this pane. See [“Editing cases”](#) on page 195.
- **Summary**: Click this node to view a Case Information Summary table.
- **Case Documents**: Click this node to view Collection Sets and Archive Sets created for the corresponding case. You can easily differentiate these sets as the icons are different for them. Refer to the sample image below.



- **Collection Set:** When you collect the items from Targeted Collectors, the document set is called an **Collection Set**.
- **Archive Set:** When you collect the items from Archives, the document set is called an **Archive Set**.
- **All Documents:** When you want to see documents from collection sets and archive sets of a case, click this node.
- **New Search:** From this node you can perform new searches. or run any saved searches that are related to the case.  
 See [“Performing searches within cases”](#) on page 196.
- **Research Set:** A Research Set is a collection of searches saved in a particular case. These searches are not assigned to reviewers. Emails continue to be added to Research Sets until a reviewer is assigned. Click this node to view the case-specific searches saved for preliminary research.
- **Review Set:** A Review Set is collection of searches saved for a particular case. Searches are assigned to the reviewers of the case. You can allocate a percentage of the search results to each reviewer. Click this node to view the case-specific searches saved for review.
- **Tags:** Click this node to view all of the tag assignments for the case.
- **Production Sets:** Click this node to view all the production sets created within a case.
- **Exports:** Click this node to view the exports-specific details of the selected case.
- **Case History:** Click this node to view a table of actions that were performed on this case.

# Editing cases

Administrators and reviewers with the appropriate permissions can edit the cases to which they are assigned, and for which they have been granted edit permission.

## To edit a case

- 1 From the **eDiscovery** tab, select the **Cases** node to display the cases list in the main pane.
- 2 Select the required case from the cases list.

Under the **Cases** node in the left pane a **case\_name** node appears for the selected case.

- 3 In the left navigation pane, click the **case\_name** node to display the case details pane.

- 4 Edit the case details as required. Review the following table for more information.

---

**Note:** If you do not have edit permissions, the settings are not changeable.

---

<b>Case Status</b>	You can edit the case-level legal hold status.  You can also set the Case Status to <b>Inactive</b> or <b>Completed</b> . Setting the status to <b>Inactive</b> disables all functionality for working with the case.
<b>Case Details</b>	You can edit the case name, description, case filing date, case expiration date, case type, department, matter number, docket number, and notes. You can add additional staff members to the case.
<b>Custodians for Case</b>	You can add or remove the custodian archives to monitor for the case.
<b>Reviewers for Case</b>	You can add or remove reviewers or edit reviewer permissions for the case.
<b>Reassign Items</b>	You can reassign items from one reviewer to another reviewer.
<b>Customizations</b>	You can change the Review Status available for the case.
<b>Redaction Reasons</b>	You can change the redaction reasons available for the reviewers of the case.

---

**Note:** Click **Refresh** to update the number of items that are included in the selected case and the number of items on legal hold.

---

- 5 Click **Save** after you finish editing the case details.

## About searches in eDiscovery

### Performing searches within cases

Administrators or reviewers with the appropriate permissions can search the archives that are associated with a selected case.

A search can then be saved and assigned to the case's reviewers as required.

---

**Note:** You can now use an advanced search to find the emails, attachments, collaboration chats, and files that include a classification tag. The Veritas Alta Classification assigns classification tags to emails, attachments, collaboration chats, and files that match an enabled classification policy. The built-in Veritas Alta Classification policies help you to locate any emails that may infringe your corporate policies or regulations.

---

### To perform a new search of a case

- 1 On the **eDiscovery** tab, select **Cases** to view a list of cases.
- 2 Search for and select the required case from the list of cases.  
Under the **Cases** node, in the left pane, a **case\_name** node appears for the selected case.
- 3 Select the **case\_name** node > **New Search**.
- 4 Perform advanced search or query search to get the expected items. See [“Performing Advanced Search and Query Search”](#) on page 312.
- 5 Click **Search**.

---

**Note:** The results of an Advanced Search include a **Relevance** column. The length of the bar in this column represents how closely the item matches the search criteria, relevant to the other items in the results.

---

- 6 Click **Save Search**.  
See [“Saving searches in Review sets and Research sets”](#) on page 197.

## Saving searches in Review sets and Research sets

If you have the required permissions you can save a search of a case. A search of a case can be saved as a Research Set or a Review Set:

- A Research Set is not assigned to reviewers. emails and collaboration messages and files continue to be added to Research Sets until a reviewer is assigned.
- A Review Set is assigned to the reviewers of the case. You can allocate a percentage of the search results to each reviewer.
- Additionally, you can select *No Allocation* in case you want to assign zero percentage to all reviewers. In this case, items are not assigned to any single reviewer. Any reviewer can again review and tag the items that are reviewed and tagged before. The review tag can be changed by another reviewer.

**To save a search of a case**

**1** Perform a new search on the case.

See [“Performing searches within cases”](#) on page 196.

**2** Click **Save Search**.

**3** In the **Save Search** dialog box, provide the following information:

**Enter Saved Search Name** Enter a name for the saved search.

**Legal hold** Select to place all items in the saved search on legal hold. Items that are on legal hold cannot be deleted from the archive.

**Assign Create Review Set** Select this check box to assign the search results to the reviewers of the case.

The **Create Research Set** dialog displays a list of reviewers of the case. Select one of the following options to assign items to reviewers.

- **No assignment:** No specific percentage of items are assigned to any single reviewer. Items that are reviewed and tagged by any of the reviewers can be edited and tagged by other reviewers.
- **Custom assignment:** You can decide specific percentage of items to reviewers. The total allocation percentage must be 100 percent. If the case has only one reviewer, Alta eDiscovery automatically assigns all items to the reviewer.
- **Assign equally to all reviewers:** The application equally distributes percentage of items among reviewers.
- **Allow shared reviews:** Select this check box to allow reviewers to access and review items assigned to other reviewers. If you have selected the Custom Assignment or the Assign equally to all Reviewers option, you can clear this check box to restrict reviewers to access and review items assigned to other reviewers. If you have selected the **No Assignment** option, this check box is selected by default. You cannot clear it.

**Note:** If you do not select **Create Review Set**, the search is saved as a Research Set.

Items continue to be added to a Research Set until it is assigned to the reviewers and so becomes an Assigned Search.

**4** Click **Save** to save the search.

- If you selected the **Create Review Set** check box, the search is saved under the **Review Sets** node.
- Otherwise the search is saved under the **Research Sets** node.

## Modifying saved searches of cases

You can view the results of a saved search of a case. If the saved search is a Research Set, you can also change its name, create a new search with the same criteria.

---

**Note:** You cannot modify Assigned Searches.

---

### To view or update a saved search of a case

- 1 On the **eDiscovery** tab, select **Cases** to view a list of cases.
- 2 Search for and select the required case from the list of cases.
- 3 Under the **Cases** node, in the left pane, a **case\_name** node appears for the selected case.
- 4 Select the **case\_name > Research Sets** or **Review Sets**
- 5 Select the required search under the Research Sets or the Review Sets node or the node.  
  
The search displays its results.
- 6 To change the name of a Research Set or to clone it, click **Update Saved Search** in the menu bar.

---

**Note:** You cannot modify Assigned Searches.

---

- 7 Update the information in the **Saved Search** dialog as required. See the following table for more information:

<b>Enter Saved Search Name</b>	Provide a new name for the search.
--------------------------------	------------------------------------

Then select an option for modifying the search as follows:

<b>Save as New</b>	Select to create a new Research Set with the new name.  The current search is unaffected.
--------------------	---

<b>Update</b>	Select to update the existing Research Set with the new name.
---------------	---

## Applying a search-level legal hold

Accounts with the appropriate permissions can place items from a search on legal hold. Applying a search-level hold ensures that specific items remain on hold even if a case-level legal hold is removed.

You can apply a search-level legal hold to Research or Review sets.

### To apply a search-level legal hold

- 1 On the **eDiscovery** tab, select **Cases** to view a list of cases.
- 2 Search for and select the required case from the list of cases.
- 3 Under the **Cases** node, in the left pane, a **case\_name** node appears for the selected case.
- 4 Select the **case\_name** > **Research Sets** or **Review Sets**
- 5 Select the required search under the Research Sets or the Review Sets node or the node.  
  
The search displays its results.
- 6 In the top-right corner, click **Apply Search Legal Hold**.

---

**Note:** To remove a legal hold after it has been applied, select the same search, and click **Remove Search Legal Hold**.

---

## Assigning review sets to reviewers

Administrators or reviewers with the appropriate permissions can assign the results of a Research Set for a case to various reviewers to expedite the eDiscovery process.

---

**Note:** After assigning a search to reviewers, it cannot be edited.

---

### To assign a Research Set to reviewers

- 1 From the **Research Sets** node of a case, select a **Saved Search**.
- 2 Click **Create Review Set**. The **Assign Emails for Review** dialog displays a list of the case's reviewers.

**3** Select one of the following options to assign items to reviewers.

No assignment	No specific percentage of items are assigned to any single reviewer. Emails that are reviewed and tagged by any of the reviewers can be edited and tagged by other reviewers.
Custom assignment	You can decide specific percentage of items to reviewers. The total allocation percentage must be 100 percent. If the case has only one reviewer, Alta eDiscovery automatically assigns all items to the reviewer.
Assign equally to all reviewers	The application equally distributes percentage of items among reviewers.
Allow shared reviews	Select this check box to allow reviewers to access and review items assigned to other reviewers.  If you have selected the Custom Assignment or the Assign equally to all Reviewers option, you can clear this check box to restrict reviewers to access and review items assigned to other reviewers.  If you have selected the No Assignment option, this check box is selected by default. You cannot clear it.

**4** Click **Save**.

Alta eDiscovery automatically moves the search to the **Review Sets** node.

## Generating a search summary report

Any user who has access to the New Searches node, the On-going Searches node, the Standard Searches node, and the Advanced ECA node on the **Investigations** tab can generate a printable report of searches.

Any user who has access to the New Searches node, the Research Set node, and the Review Set node on the **eDiscovery** tab can generate a printable report of searches.

**To generate a printable report for searches on the Investigations tab**

- 1** On the **Investigations** tab, expand the New Searches node, the On-going Searches node, the Standard Searches node, and the Advanced ECA node as required.
- 2** Select the search for which you want to export the printable report.
- 3** On the action menu bar, click the More Options icon, and click **Export Report**.  
  
The application generates a report with the information about custodians, the parameters, and the results.

**To generate a printable report for searches on the eDiscovery tab**

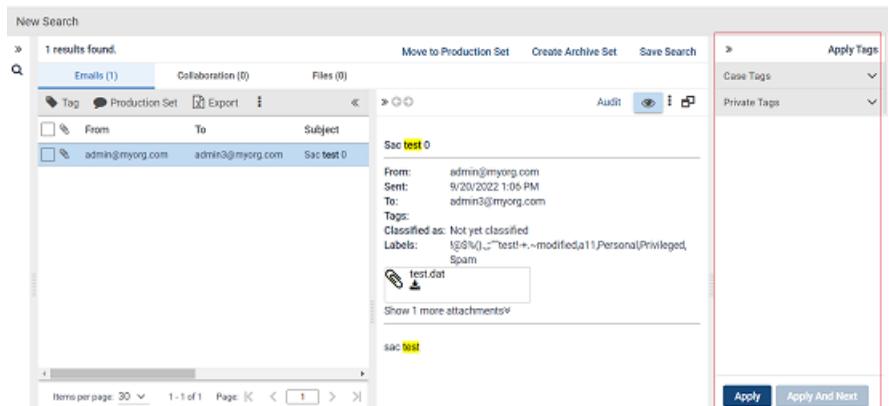
- 1 On the **eDiscovery** tab, expand the New Searches node, the Research Sets node, or the Review Sets node.
- 2 Select the search for which you want to export the printable report.
- 3 On the action menu bar, click the More Options icon, and click **Export Report**.  
 The application generates a report with the information about custodians, the parameters, and the results.

# Applying tags to the searched items in cases

**To apply tags to the searched items in a case**

- 1 From the **eDiscovery** tab, select the **Cases** node to display the cases list.
- 2 Select the required case from the cases list.  
 Under the **Cases** node in the left pane, a **case\_name** node appears for the selected case.
- 3 Click the **case\_name** node to display the case details pane.
- 4 Select the searched item either by executing a new search or from the research and review set.

When you select an item, the **Apply Tags** panel appears in the right side.



- 5 Expand **Case Tags / Private Tags** and select the multiple relevant tags. In the same panel, click **Apply**.  
 If you want to select the next item for applying tags, you can click **Apply And Next**.

# Managing case documents

This chapter includes the following topics:

- [Understanding document sets in cases](#)
- [Moving case documents to production sets](#)
- [Creating archive sets during investigation](#)
- [Creating archive sets during case management](#)

## Understanding document sets in cases

For cases, you can collect documents from Targeted Collectors and Archives (new searches, saved On-going/Standard searches, and saved research sets).

When you collect the items from targeted collections, the document set is called an **Collection Set**. When you collect the items from archives, the document set is called an **Archive Set**. You can create new Collection and Archive Sets while sending the search results from the **Investigation** tab to cases under the **eDiscovery** tab. These sets are saved and displayed in the **eDiscovery** tab. After you select the case, you can view such Collection and Archive Sets under **Case Documents**.

Use **Advance Search** to filter the result. The **Query Search** is not supported for case documents.

**Case Documents** support tagging, creating production sets, exporting, and exporting report. Tagging and exporting by custodians is not supported.

## Moving case documents to production sets

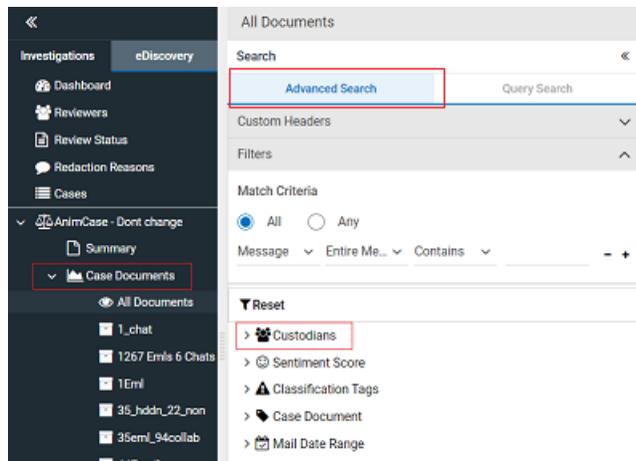
You can move emails, collaboration messages, and files from the case documents to the unlocked production sets only, and not to the locked production sets. You

need to unlock the production sets before moving these items to the locked production sets.

**To move case documents to production sets**

- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Search for and select the case in which you want to search emails.  
 The selected **Case\_Name** node appears below **Cases**.
- 3 Click **Case Documents** and select a set of documents from which you want to move items to document set.  
 The available emails, collaboration messages, and files are displayed.
- 4 To further filter the items from the case document set, use the **Advanced Search** or the **Query Search** tabs.

If you are performing the Advanced Search in Case Documents node, a new filter attribute - **Custodians** - is available along with other attributes under the **Filter** facet. This filter attribute is available only for the Case Documents node as shown in the sample image below.




---

**Note:** The **Custodians** filter attribute is not available in the **Advanced Search** tab of any other node.

When you expand the **Custodians** attribute, the application displays a top few custodians and a **Show more** option. Click **Show more** to open the **Select Custodians** dialog box.

---

- 5 Set the filter criteria to further refine your items search, and click **Search**.  
 The filtered emails, collaboration messages, and files are displayed.
- 6 To move all the emails, collaboration messages, and files from the result, click **Move to Production Set**.
- 7 To move emails only, on the **Emails** tab, select the emails you want to include in the production set. Click **Production Set**, and do any of the following:
  - Click **Move all emails** to include all the emails available in the search.
  - Click **Move current page** to include all the emails displayed on the selected page.
  - Click **Move selected emails** to include all the selected emails from the search.
- 8 To move collaboration messages, on the **Collaboration** tab, select the emails you want to include in the production set. Click **Production Set**, and do any of the following:
  - Click **Move all messages** to include all the collaboration messages available in the search.
  - Click **Move selected messages** to include all the selected collaboration messages from the search.
- 9 To move files, on the **Files** tab, select the files you want to include in the production set. Click **Production Set**, and do any of the following:
  - Click **Move all files** to include all the files available in the search.
  - Click **Move selected files** to include all the selected files from the search.

**10** In the **Production Set** dialog box, specify the following:

**New Production Set**

Select this option if you want to move the selected emails in a new production set. This option is selected by default.

In the **Production Set Name** field, enter a unique name for this production set.

In the **Description** field, enter a brief description of the production set.

**Existing Production Set**

In the **Production Set Name** drop-down list, you can view only the unlocked production sets. You can not move emails to the locked production set.

In the **Production Set Name** drop-down list, select a set to which you want to move (add) the selected emails.

The description of the selected production set appears for your reference.

**11** Click **Submit**.

If you have created a new production set, the application displays the *Production set created successfully* message. This newly created production set gets listed under **eDiscovery** tab > **Cases** > *Case\_Name* > **Production Set**.

If you have moved the items to an existing production set, the application displays the *Production set updated successfully* message.

# Creating archive sets during investigation

## To create an archive set during investigation

- 1 On the **Investigations** tab, select **Managed Accounts**. and do any of the following:
  - Select **New Search** to execute a search.
  - Expand **On-going Searches** or **Standard Searches** as required, and select the required saved search.
- 2 To send all the items of the search to a collection set, click **Send to Case**.  
 To send specific items of the search to a collection set, search for and select them, and then click **Send to Case**.
- 3 In the **Send to Case - Create Archive Set** dialog box, specify the following:

**Cases** Search and select the case in which you want to create an archive set and documents accordingly.

**Archive Set name** To create a new Archive Set, select **New** and provide a unique name for the archive set you want to create.  
 To send the items in the existing Archive Set, select **Existing**. The application displays a list of existing archive sets, then select the required archive set.

Note: Sending this search result from Investigations to a Case in eDiscovery ignores the custodian(s) selected in the Case setup.

- 4 Click **Save**.

# Creating archive sets during case management

## To create an archive set during case management

- 1 On the **eDiscovery** tab, select a case, and do any of the following:
  - Select **New Search** to execute a search.
  - Expand **Research Set**, and select the required saved search.

Use **Advance Search** to filter the result. The **Query Search** is not supported for case documents.

- 2 To send all the items of the search to a collection set, click **Send to Case**.  
 To send specific items of the search to a collection set, search for and select them, and then click **Send to Case**.
- 3 In the **Create Archive Set** dialog box, specify the following:

**Cases** Search and select the case in which you want to create an archive set and documents accordingly.

**Archive Set name** To create a new Archive Set, select **New** and provide a unique name for the archive set you want to create.  
 To send the items in the existing Archive Set, select **Existing**. The application displays a list of existing archive sets, then select the required archive set.

Note: Sending this search result from Investigations to a Case in eDiscovery ignores the custodian(s) selected in the Case setup.

- 4 Click **Save**.

# Managing redaction reasons

This chapter includes the following topics:

- [About redaction reasons](#)
- [Adding redaction reasons](#)
- [Editing redaction reasons](#)
- [Deleting redaction reasons](#)

## About redaction reasons

Redaction reasons are the reason codes that lets reviewers justify a reason of redaction in the document. You can create, edit, and delete redaction reasons. Redaction reasons can be applied on the documents while adding redactions. Redactions and redaction reasons can be applied to the document from the **Native** view of the document.

## Adding redaction reasons

**To add a redaction reason**

- 1 On the **eDiscovery** tab, select **Review Status**.
- 2 Click **Add Row**.
- 3 In the newly added row, do the following:
  - In the **Name** column, enter a unique reason name in brief.
  - In the **Description** column, describe the reason in detail.

- Select the **Active** column to keep this reason available in the system. Clear the check box if you want to deactivate this reason.
- 4 Click **Save**.

## Editing redaction reasons

You cannot edit a redaction reason if that reason is applied to any of the redactions marked in any of the documents. Such redaction reasons remain disabled for editing. The reasons that are not applied to any redaction can be edited any time.

### To edit a redaction reason

- 1 On the **eDiscovery** tab, select **Review Status**.
- 2 Search for and select the reason that you want to modify.
- 3 In the **Name** column, click the redaction reason name. The field becomes editable. Modify the reason name in brief, if required.
- 4 In the **Description** column, click the redaction reason name. The field becomes editable. Modify the reason description, if required.
- 5 Select or clear the **Active** column to keep this reason active or inactive respectively.
- 6 Click **Save**.

## Deleting redaction reasons

You cannot delete a redaction reason if that reason is applied to any of the redactions marked in any of the documents. The reasons that are not applied to any redaction can be deleted any time.

### To delete a redaction reason

- 1 On the **eDiscovery** tab, select **Review Status**.
- 2 Search for and select the reason that you want to delete.
- 3 Click **Delete Row**.

# Managing reviews

This chapter includes the following topics:

- [About reviewing cases](#)
- [Reviewing emails](#)
- [Reviewing collaboration messages](#)
- [Reviewing files](#)
- [Annotating and redacting email and file content in native viewer](#)

## About reviewing cases

As a reviewer of a case in the **eDiscovery** tab, you see only the resulting emails, attachments, collaboration chats, and files from the case searches that are assigned to you. You work with those emails, attachments, collaboration chats, and files to identify the content of interest. Alta eDiscovery provides review status tags, custom tags, and labels, all of which you can apply to emails, attachments, collaboration chats, and files to help you manage the review process. You can then discover the emails, attachments, collaboration chats, and files by tag name.

If your organization is enabled for the Veritas Alta Classification service, some emails, attachments, collaboration chats, and files may be tagged with classification tags. The presence of a classification tag indicates that the email matches a classification policy that has been enabled in the Veritas Alta Classification.

You can also add case-specific notes to an email that another reviewer who works on the same case can see.

Additionally, the eDiscovery function includes various reporting features. These features allow reviewers to view audit trails for individual email, attachment, collaboration chat, and file or for the history of an entire case.

# Reviewing emails

The **Emails** tab appears only if the Exchange Online service is enabled and the archive collector is configured for you. You can review all the emails that are coming from the Exchange Online. While reviewing the emails, you can perform the following actions:

- Applying tags
- Creating and exporting production sets
- Exporting emails
- Exporting summary report
- Viewing audit history
- Adding notes
- Applying review status
- Printing emails
- Restoring emails
- Forwarding emails

## Accessing emails for review

### To access emails for review

- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Search for and select the case in which you want to search emails.
- 3 The selected **Case\_Name** node appears below **Cases**.
- 4 Click **New Search** to create a new search. Else, expand **Research Sets** or **Review Sets** to select existing search.

You can access existing saved searches of the selected case from the **Review Set** and **Research Set** nodes. Alternatively, Perform advanced search or query search to get the expected items. See [“Performing Advanced Search and Query Search”](#) on page 312.

After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

- 5 Click the **Emails** tab.
- 6 Select the email to view its details in the Preview pane.

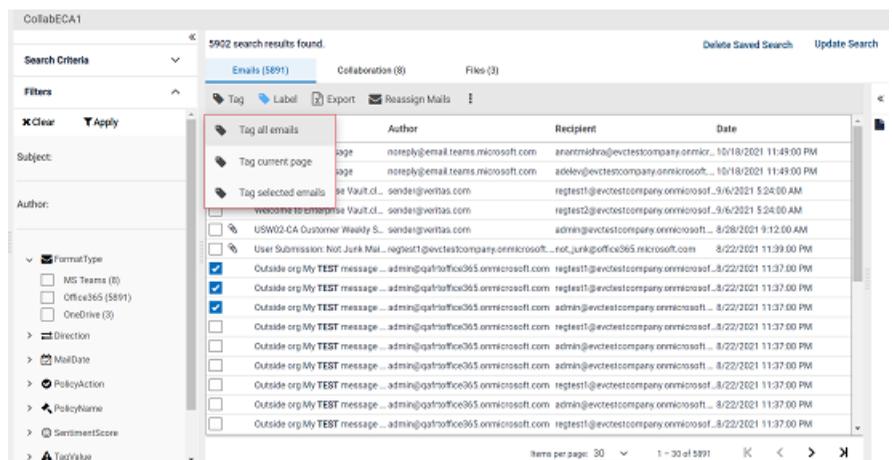
## Applying tags to emails

To help organize your work you can tag emails with custom tags of your own choosing, which are visible only to you. You can also tag emails with a managed tag, if you have any of these available to you. Managed tags are created in the Veritas Alta View Compliance and Governance Management Console, under the **My Config > Managed Tags** node. For more information on managed tags, see the Archive Administration Help.

**Note:** The Veritas Alta Classification assigns classification tags to emails that match an enabled classification policy. You cannot add classification tags manually.

### To apply tags to emails

- 1 Browse the archives of accounts that are assigned to you, or conduct a search, or view the **Review Status Tags** for a case that is assigned to you.
- 2 Click on emails to view its details in the preview pane.
- 3 Select the emails you want to tag, and click **Tag**.
  - To tag only the selected emails, click **Tag selected emails**.
  - To tag all the emails displayed on the page, click **Tag current page**.
  - To tag all the emails in the search, click **Tag all emails**.



- 4 In the **Add Tag** dialog box, do the following:

Tag Name	Enter a new unique tag name.
Comments	Provide a comment or a description for the tag name.
Legal Hold	Select this check box if you want to apply the legal hold on the emails.
Select retention Tag	Instead of applying a new tag, you can apply the retention tags that are created in Veritas Alta Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply.

- 5 Enter a tag name and description for the custom tag. Alternatively, you can select the a retention tag, if any are available to you.
- 6 Click **Tag**.

---

**Note:** In the **eDiscovery** tab, any custom tags you create are listed in the **Tags** node of the selected case.

The **Tags** node does not show classification tags.

---

## Exporting emails

### To export emails

- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Search for and select the case in which you want to search emails.  
The selected **Case\_Name** node appears below **Cases**.
- 3 Click **New Search** to create a new search. Else, expand **Research Sets** or **Review Sets** to select existing search.

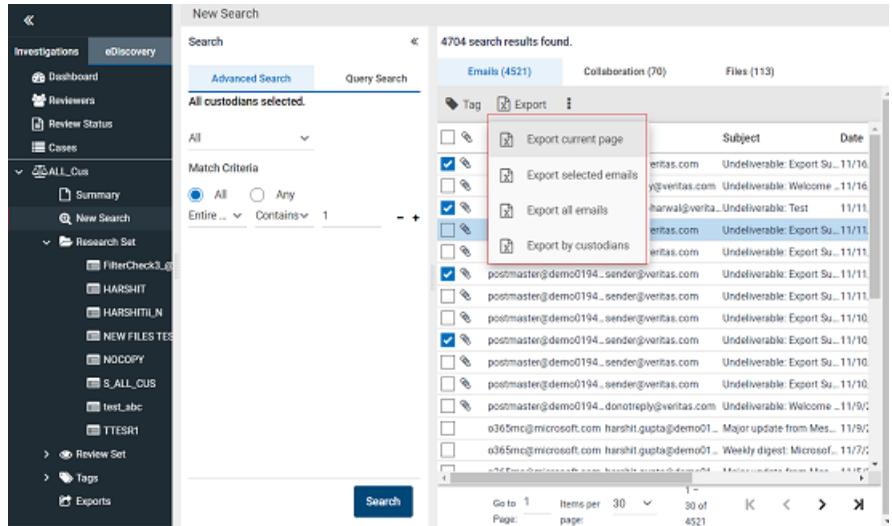
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**Note:** You can access existing saved searches of the selected case from the **Review Set** and **Research Set** nodes. Alternatively, you can click **New Search**, perform advanced search or query search to get the expected items. See [“Performing Advanced Search and Query Search”](#) on page 312.

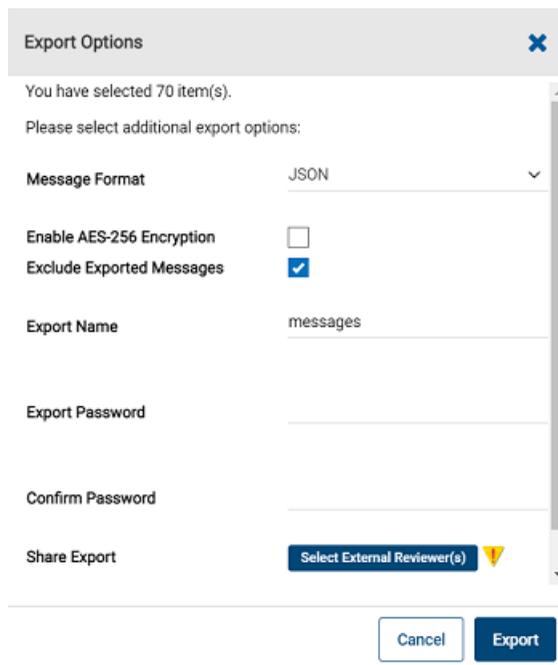
After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

---

- 4 On the **Emails** tab, select the emails you want to export. Click **Export**, and do any of the following:
  - Click **Export current page** to export all the emails displayed on the selected page.
  - Click **Export selected emails** to export all the selected emails from the search.
  - Click **Export all emails** to export all the emails available search.
  - Click **Export by custodians** to export all the emails from the selected custodians.



- 5 Click **Export**, and do any of the following:
- 6 If you are exporting all emails in the search, all emails displayed on the page, or selected emails, in the **Export Options** dialog box, do the following:



**Message Format**

The available message formats are:

- Clearwell
- EML
- EML with EDRM
- PST with EDRM
- MSG with EDRM
- FTI-RingTail
- EDRM Only
- PST
- OriginalEDRM

If you select this option, the exported file includes emails in both MSG and EML formats, allowing you to work with the emails in the format that best suits your needs.

Besides this, the exported file includes additional files, namely - *edrmXML.xml* and *HTMLReport.html* in their original formats. These files facilitates a smooth transfer of electronically stored information (ESI) between different software programs during the electronic discovery process.

- Original

If you select this option, the exported file includes emails in both MSG and EML formats, allowing you to work with the emails in the format that best suits your needs.

**Note:** The *OriginalEDRM* and *Original* message formats are available to the users that are listed in the

**Configuration\_Overriden** table in the Veritas Alta Archiving database. If you want to avail these options in the **Message Format** drop-down field, contact Veritas support.

**Include Journaling Envelope**

Select this option to include journaling envelopes, which contain information about email recipients such as distribution lists.

**Exclude Exported Messages**

Select this option to exclude the exported messages.

**Enable AES-256 Encryption**

Select this check-box if you want to secure the access of the downloaded export batch.

**Export Name**

Provide the name for the batch you want to export. By default, it takes the Search Name. You can change it if required.

**Export Password**

Enter the password that you want end user to provide when they access this exported batch of messages.

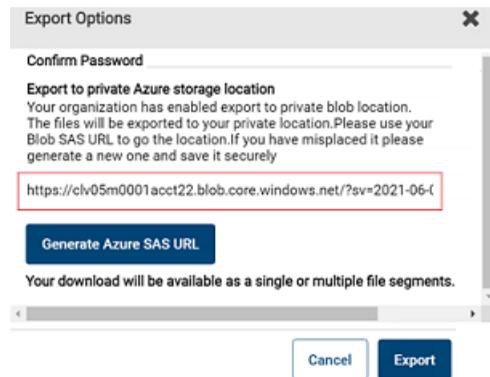
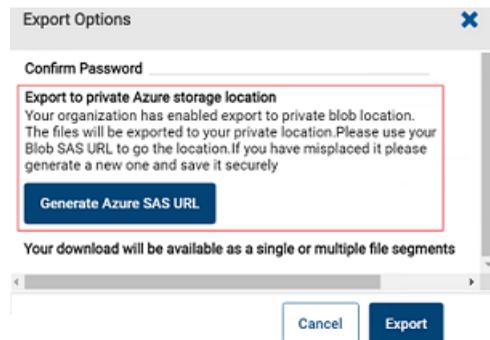
**Confirm Password**

Repeat the same password for confirmation.

**Generate Azure SAS URL**

**Note:** Users can see this button only if the **Export to Azure private storage location** feature in the Veritas Alta View Compliance and Governance Management Console is enabled for them. Users can export items to their private Azure Blob storage location.

Click **Generate Azure SAS URL** to get the Azure Blob SAS URL to access the location and save it for future use.



For security reasons, the application does not show this URL the next time. However, if the SAS URL is misplaced for any reason, click **Generate Azure SAS URL** again to generate a new SAS URL and save it securely.

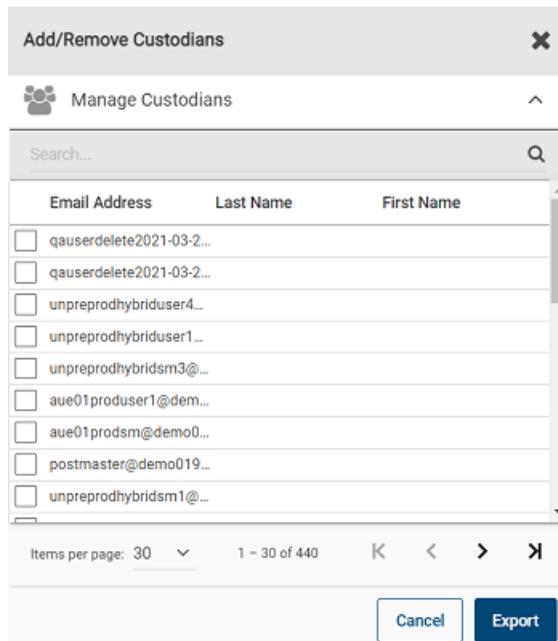
After you click **Export** on the **Export Options** dialog box, all the selected items are exported to the Azure private storage location. You can use Microsoft Storage Explorer to access the exported items.

**Share Export**

Click **Select Admin** to choose the recipients of this batch export and click **Update**.

**Note:** You need to manually share the Export Password with the administrators and follow all the security specific rules of the organization.

- 7 If you are exporting emails by custodians, in the **Add/Remove Custodians** dialog box, search for and select the custodians.

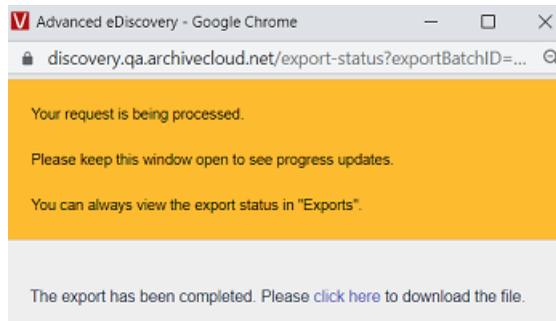


**8** Click **Export**.

---

**Note:** The exported batch can either gets downloaded as a single or multiple file segments.

---



**9** Click **Click here** to download the exported batch of emails.

**10** To confirm the status of batch export, on the **eDiscovery** tab, under the selected case node, select **Exports**, and search this export batch name.

## Exporting a search summary report for emails

**To export a search summary report for emails during case review**

- 1** On the **eDiscovery** tab, click **Cases**.
- 2** Search for and select the case in which you want to search emails.
- 3** The selected **Case\_Name** node appears below **Cases**.

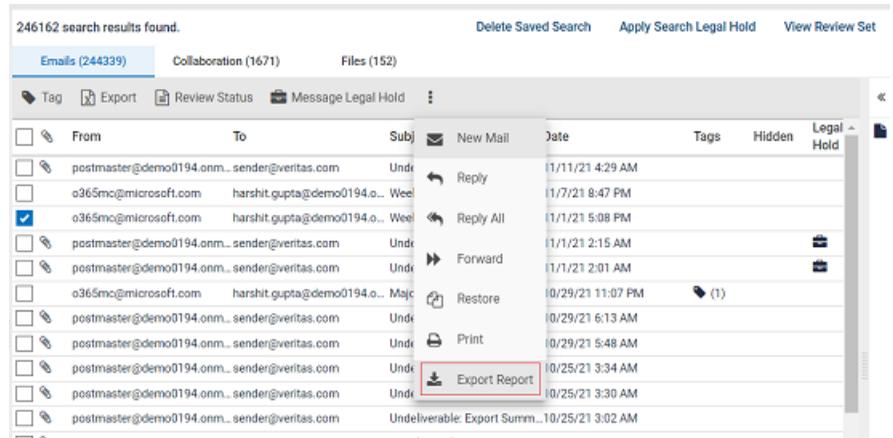
- 4 Click **New Search** to create a new search. Else, expand **Research Sets** or **Review Sets** to select existing search.

You can access existing saved searches of the selected case from the **Review Set** and **Research Set** nodes. Alternatively, you can click **New Search**, specify a new criteria in the *Advanced Search* or the *Query Search* option to search for new emails for review.

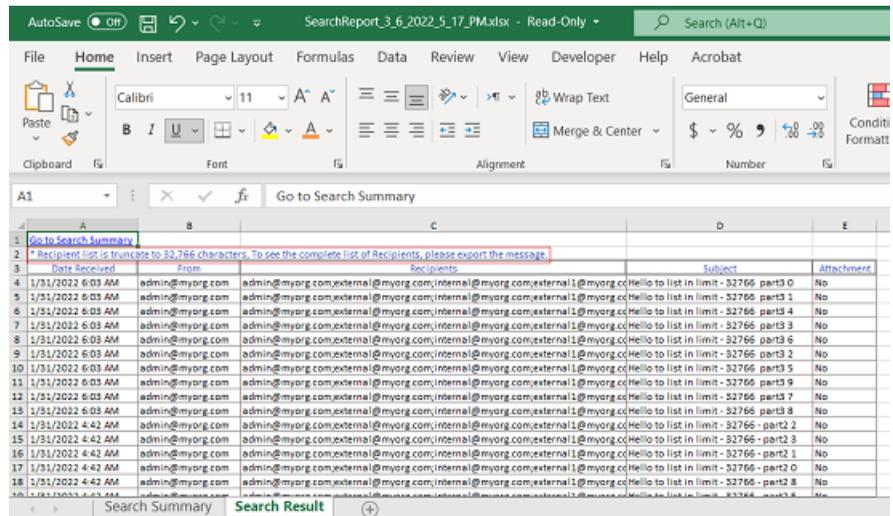
After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

5 On the **Emails** tab, click the **More Actions** icon, and click **Export Report**.

**Note:** The following sample image is specific to a search in **Review Sets**. If you select the search from **Research Sets**, the application do not show the **Review Status** and the **Message Legal Hold** options on the action bar.



The application downloads the summary report (.xlsx) of the emails within the search as a zipped (.zip) folder. A sample report is shown below. The report comprises of two sheets.



The **Search Summary** sheet displays details such as Search Parameters and Custodians.

The **Search Result** sheet displays details such as Date Received, From, Recipients, Subject, and Attachments. The recipient column in this summary report includes recipients mentioned in the To, CC, and BCC fields. If the list of recipients is longer than 32766 characters, the application truncates the list. The report displays a note that - *Recipient list is truncate to 32,766 characters, To see the complete list of Recipients, please export the message*. In such scenario, to view the complete list of recipients, you need to export the individual message.

---

**Note:** If you select a search from **Review Sets**, and select any filter option and click **Apply**, the **Export Report** option remains disabled.

---

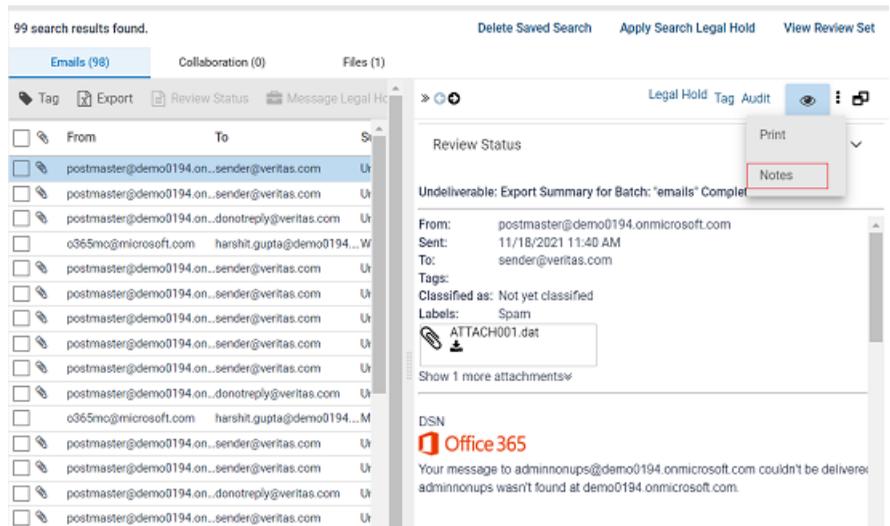
## Adding notes to emails

Reviewers can add notes to emails that are visible to other reviewers of that case. Notes are case-specific, therefore, a note that is applied to an email in one case does not appear for the same email in a different case. Notes can be provided to emails that are from the **Review Sets** only. You cannot provide notes to the emails that are from the **Research Set**.

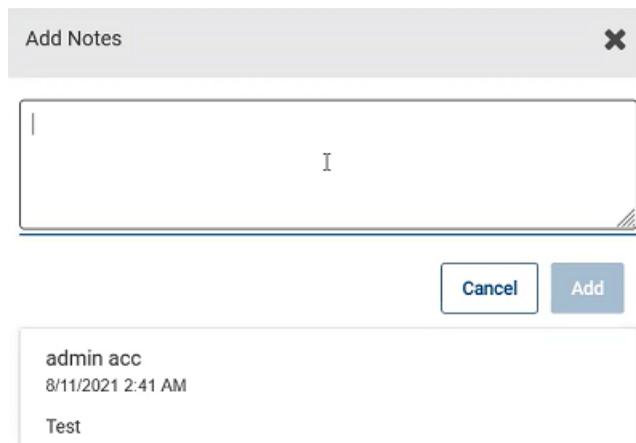
### To add a note to an email

- 1 From the **eDiscovery** tab, select the **Cases** node to display the cases list in the main pane.
- 2 Select the required case from the cases list.  
Under the **Cases** node in the left pane a **case\_name** node appears for the selected case.
- 3 Click the **case\_name > Review Sets**.
- 4 Select the required search under the Review Sets node.
- 5 On the **Emails** tab, select the email to view its details in the preview pane.

**6** Click the **More options** icon and select **Notes**.



**7** In the **Add Notes** dialog box, specify the note about this message.



**8** Click **Add** to save the note.

---

**Note:** Different reviewers can add and save their notes for the same email. The application displays all the notes applied to the email that can be used for a collaborative reviews.

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## Applying review status to emails

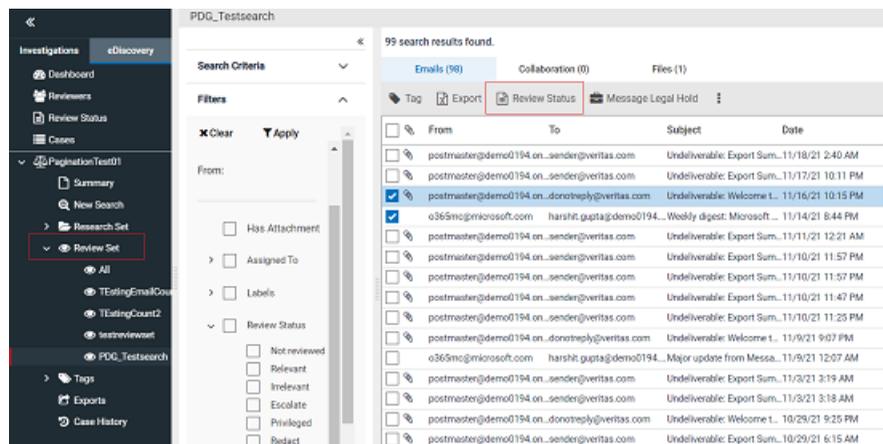
Case reviewers can apply one of the following default review status to emails to indicate its status in the eDiscovery review process:

- **Not reviewed**
- **Escalate**
- **Irrelevant**
- **Privileged**
- **Redact**
- **Relevant**

In addition, the eDiscovery Administrators can customize the available review status options.

### To apply review status to emails

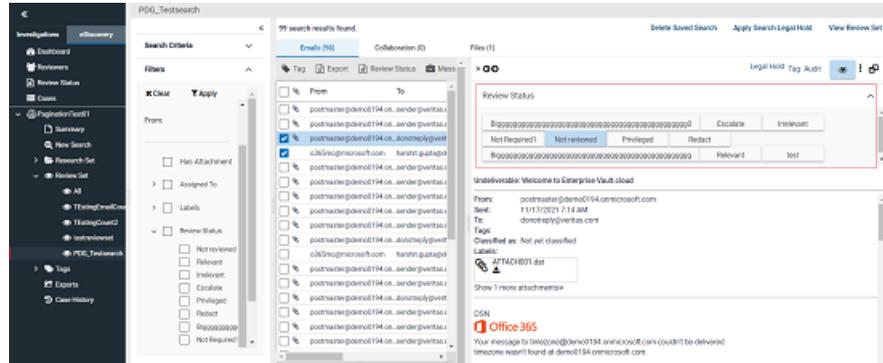
- 1 Under the associated case, select **Review Set**, and open the corresponding review set node.
  - Select the check box for one or more emails in the list, and click **Review Status** on the action bar.
  - Then select the required review status as shown below.



- 3 To apply a review status to an email while you view its details:
  - Select the email from the **Review Set** list to display its details in the preview pane.

The review status is shown at the top of the preview pane that displays the details of the message.

- Click the required review status from the row of review status options as shown below.




---

**Note:** To view emails based on their review status, you can filter the required review status node under the **Filter** section.

---

## Viewing audit history of emails

### To view the audit history of a emails

- From the **eDiscovery** tab, select the **Cases** node to display the cases list in the main pane.
- Select the required case from the cases list.  
 Under the **Cases** node in the left pane a **case\_name** node appears for the selected case.
- Click the **case\_name** > **Research Sets** or **Review Sets**.
- Select the required search under the Research Sets or the Review Sets node.
- On the **Emails** tab, select the emails to view its content in the preview pane.

- On the Preview pane, click **Audit**.

The application displays the audit history as shown in the following sample image.

Action	User	Date	Before value	After value
Review Set Search Result	a a	11/2/2021 2:14 AM		Not reviewed
Removed Label	admin rs	8/31/2021 1:28 PM	ABC	
Removed Label	admin rs	8/31/2021 1:28 PM	Personal	
Applied Label	admin rs	8/26/2021 5:35 AM		Personal
Applied Label	admin rs	8/24/2021 11:20 AM		ABC

Items per page: 30 | 1 – 5 of 5 | Navigation icons: Home, Previous, Next, Last

- If required, use the navigation icons to go to the next page, previous page, the first page, and the last page.

## Printing emails

### To print emails

- On the **eDiscovery** tab, click **Cases**.
- Search for and select the case in which you want to search emails.
- The selected **Case\_Name** node appears below **Cases**.
- Click **New Search** to create a new search. Else, expand **Research Sets** or **Review Sets** to select existing search.

You can access existing saved searches of the selected case from the **Review Set** and **Research Set** nodes. Alternatively, you can click **New Search**, specify a new criteria in the *Advanced Search* or the *Query Search* option to search for new emails for review. After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

- Click the **Emails** tab.
- Select the email to view its details in the Preview pane.

- 7 Click the **More options** icon and select **Print**.  
The entire email content appears on a browser.
- 8 Click **Print** to save the email on your local computer.

## Restoring emails

### To restore an email

- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Search for and select the case in which you want to search emails.
- 3 The selected **Case\_Name** node appears below **Cases**.
- 4 Click **New Search** to create a new search. Else, expand **Research Sets** or **Review Sets** to select existing search.

You can access existing saved searches of the selected case from the **Review Set** and **Research Set** nodes. Alternatively, you can click **New Search**, specify a new criteria in the *Advanced Search* or the *Query Search* option to search for new emails for review. After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

- 5 Click the **Emails** tab.
- 6 Select the email to view its details in the Preview pane.
- 7 Click the **More options** icon and select **Restore**.
- 8 Search for and select the account for which you want to restore the email, and click **Restore**.

## Forwarding emails

### To forward an email

- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Search for and select the case in which you want to search emails.
- 3 The selected **Case\_Name** node appears below **Cases**.

- 4 Click **New Search** to create a new search. Else, expand **Research Sets** or **Review Sets** to select existing search.

You can access existing saved searches of the selected case from the **Review Set** and **Research Set** nodes. Alternatively, you can click **New Search**, specify a new criteria in the *Advanced Search* or the *Query Search* option to search for new emails for review. After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

- 5 Click the **Emails** tab.
- 6 Select the email to view its details in the Preview pane.
- 7 Click the **More options** icon and select **Forward**.
- 8 In the **Mail Composer** window, draft the email content, and click **Send** to send the original email content to a recipient.

## Reviewing collaboration messages

The **Collaboration** tab appears only if the MS Teams service is enabled and the archive collector is configured for you. You can review all the files that are coming from the MS Teams. While reviewing the messages, you can perform the following actions:

- Applying tags
- Applying legal hold
- Applying review status
- Exporting collaboration messages
- Exporting search summary report
- Adding notes
- Viewing audit history

## Accessing collaboration messages for review

### To search Collaboration messages during investigation

- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Search for and select the case in which you want to search Collaboration messages.

The selected **Case\_Name** node appears below **Cases**.

- 3 Click **New Search** to create a new search. Else, expand **Research Sets** or **Review Sets** to select existing search.

You can access existing saved searches of the selected case from the **Review Set** and **Research Set** nodes. Alternatively, you can click **New Search**, specify a new criteria in the *Advanced Search* or the *Query Search* option to search for new collaboration messages for review.

After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

- 4 Click the **Collaboration** tab to view the Chat and Channel messages for your review.
- 5 Select the collaboration message to view its details in the Preview pane.

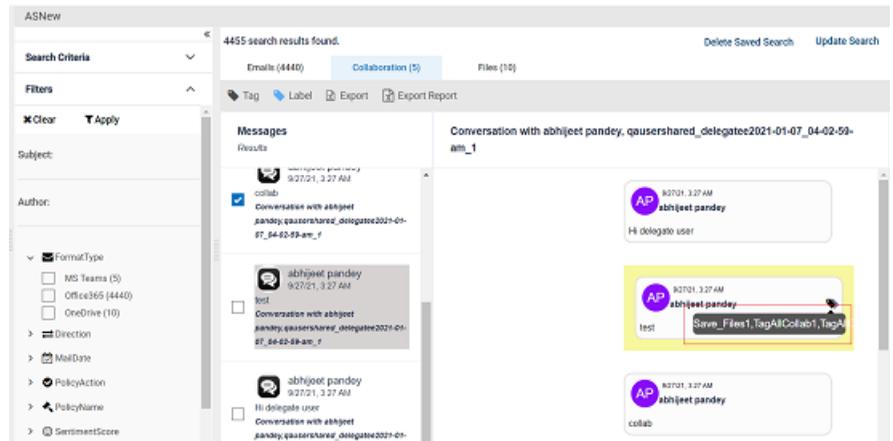
## Applying tags to collaboration messages

### To apply tags to the collaboration messages during case review

- 1 From the **eDiscovery** tab, select the **Cases** node to display the cases list in the main pane.
- 2 Select the required case from the cases list.  
Under the **Cases** node in the left pane a **case\_name** node appears for the selected case.
- 3 Click the **case\_name** > **Research Sets** or **Review Sets**.
- 4 Select the required search under the Research Sets or the Review Sets node.

- 5 In the right pane, on the **Collaboration** tab, select the collaboration messages to which you want to apply tags.

**Note:** Before you apply tags to the items, you can view the previously applied tags and classification tags of the message in the preview pane. In the following sample image, you can see the previously applied tags and classification tags of the collaboration messages when you hover over the icons.



- 6 On the action menu, click **Tag**, and do any of the following as required.
  - To tag all the items in the search, click **Tag all messages**.
  - To tag only the selected items, click **Tag selected messages**.

The screenshot displays the ASNew search interface. On the left, the 'Search Criteria' and 'Filters' sections are visible. The 'Filters' section includes 'FormatType' (MS Teams (3), Office365 (4440), OneDrive (10)), 'Direction', 'MailDate', 'PolicyAction', 'PolicyName', 'SentimentScore', and 'TagValue'. The main search results area shows '4455 search results found.' with tabs for 'Emails (4440)', 'Collaboration (5)', and 'Files (10)'. A 'Tag' menu is open, showing options for 'Tag all messages' and 'Tag selected messages'. The search results list includes three entries from 'abhijeet pandey' (9/27/21, 3:28 AM) with a 'collab' tag. The first entry is a 'new' conversation, the second is a 'chat' conversation, and the third is a 'collab' conversation. A red box highlights the 'Tag' menu options. On the right, there is a placeholder image with a magnifying glass and the text 'Select a message to preview.'

**7** In the **Add Tag** dialog box, do the following:

- |                      |  |
|----------------------|--|
| Tag Name             | Enter a new unique tag name.   |
| Comments             | Provide a comment or a description for the tag name.   |
| Legal Hold           | Select this check box if you want to apply the legal hold on the emails.   |
| Select retention Tag | <p>Instead of applying a new tag, you can apply the retention tags that are created in Veritas Alta Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply.</p> <p>After you select this option, the application disables the <b>Tag Name</b> field.</p> |

**8** Click **Tag**.

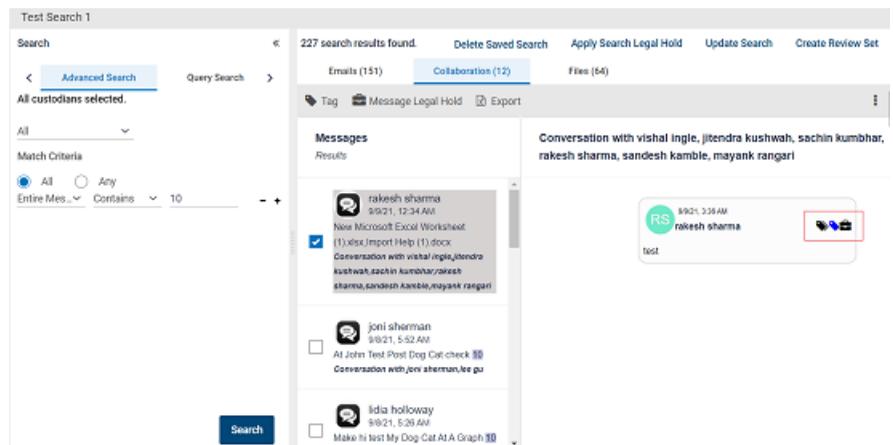
After you apply tags to the emails, these tagged emails are available under the respective tags under the **Tags** node.

## Applying legal hold to collaboration messages

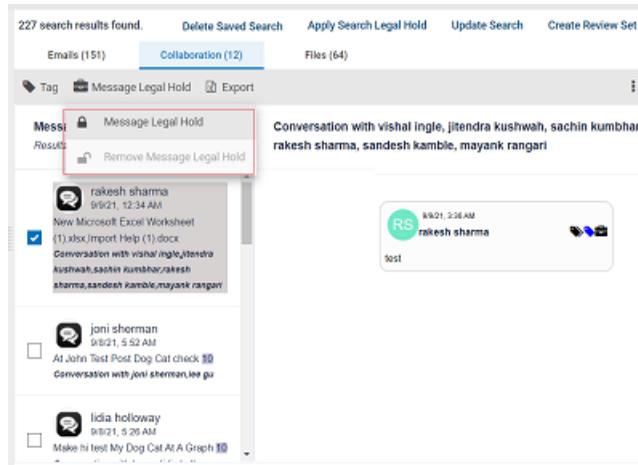
### To apply legal hold to the collaboration messages during case review

- 1 From the **eDiscovery** tab, select the **Cases** node to display the cases list in the main pane.
- 2 Select the required case from the cases list.  
 Under the **Cases** node in the left pane a **case\_name** node appears for the selected case.
- 3 Click the **case\_name** > **Research Sets** or **Review Sets**.
- 4 Select the required search under the Research Sets or the Review Sets node.
- 5 On the **Collaboration** tab, select the collaboration messages to which you want to apply legal hold.

**Note:** Before you apply legal hold to the collaboration messages, you can view the previously applied tags, labels, and classification tags of the message in the preview pane. In the following sample image, you can see the previously applied tags, labels, and classification tags of the collaboration messages when you hover over the icons.



- 6 On the action menu, click **Message Legal Hold**, and do any of the following as required.
  - To apply legal hold to the selected message, click **Message Legal Hold**.
  - To remove previously applied legal hold, click **Remove Message Legal Hold**.



## Applying and removing review status to collaboration message

Case reviewers can apply one of the following default review status to collaboration message to indicate its status in the eDiscovery review process:

- **Not reviewed**
- **Escalate**
- **Irrelevant**
- **Privileged**
- **Redact**
- **Relevant**

In addition, the eDiscovery Administrators can customize the available review status options.

### To apply and remove review status to collaboration messages

- 1 Under the associated case, select **Review Set**, and open the corresponding review set node.
- 2 To apply a review status to one or more collaboration messages directly from the **Review Set**:
  - Select the check box for one or more collaboration messages in the list, and click **Review Status**.
  - Then select the required review status.

To remove the applied review status, click the selected review status again.

- 3 To apply a review status to an collaboration message while you view its details:
  - Select the message from the **Review Set** list to display its details.  
The review status is shown at the top of the preview pane that displays the details of the message.
  - Select the required review status from the available options.

---

**Note:** To view collaboration messages based on their review status, you can filter the required review status node under the **Filter** section.

---

## Exporting collaboration messages

### To export collaboration messages

- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Search for and select the case in which you want to search collaboration messages.  
  
The selected **Case\_Name** node appears below **Cases**.
- 3 Click **New Search** to create a new search. Else, expand **Research Sets** or **Review Sets** to select existing search.

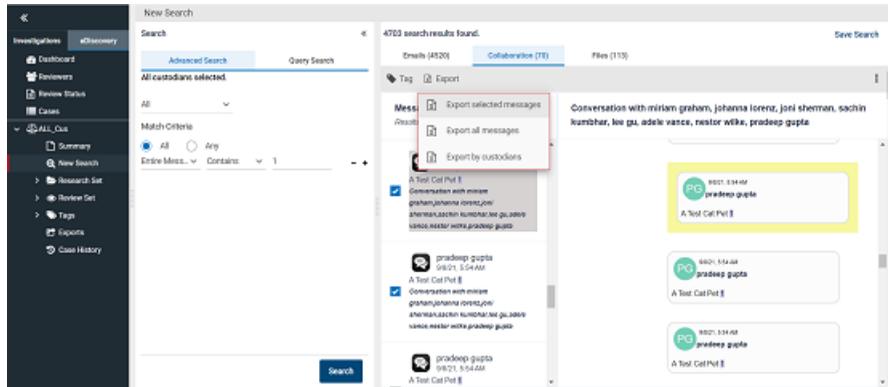
---

**Note:** You can access existing saved searches of the selected case from the **Review Set** and **Research Set** nodes. Alternatively, you can click **New Search**, specify a new criteria in the *Advanced Search* or the *Query Search* option to search for new collaboration messages for review.

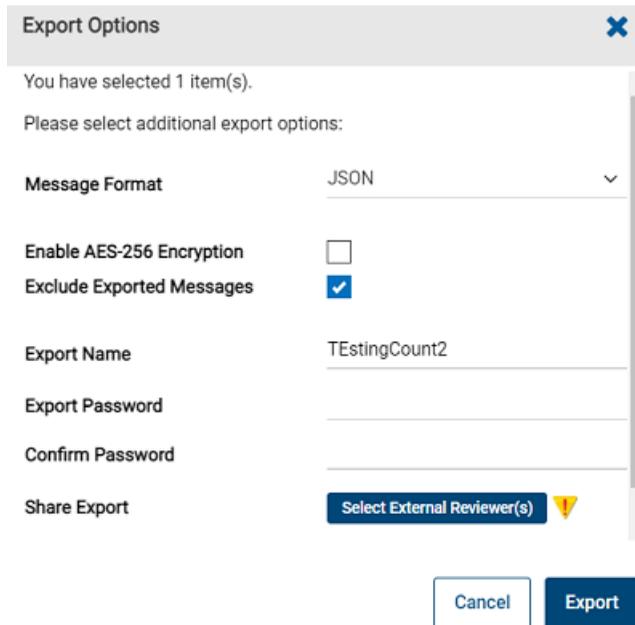
After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

---

- 4 In the right pane, on the **Collaboration** tab, select the messages you want to export.
- 5 Click **Export**, and do any of the following:
  - Click **Export selected messages** to export all the selected messages from the search.
  - Click **Export all messages** to export all the messages available search.
  - Click **Export by custodians** to export all the messages from the selected custodians.



- 6 If you are exporting all or selected messages, in the **Export Options** dialog box, do the following:



**Message Format**

The available message formats are:

- JSON
- EDRM Only

Select the appropriate message format to export the batch. By default, it is JSON.

**Exclude Exported Messages**

Select this option to exclude the exported messages.

**Enable AES-256 Encryption**

Select this check-box if you want to secure the access of the downloaded export batch.

**Export Name**

Provide the name for the batch you want to export. By default, it takes the Search Name. You can change it if required.

**Export Password**

Enter the password that you want end user to provide when they access this exported batch of messages.

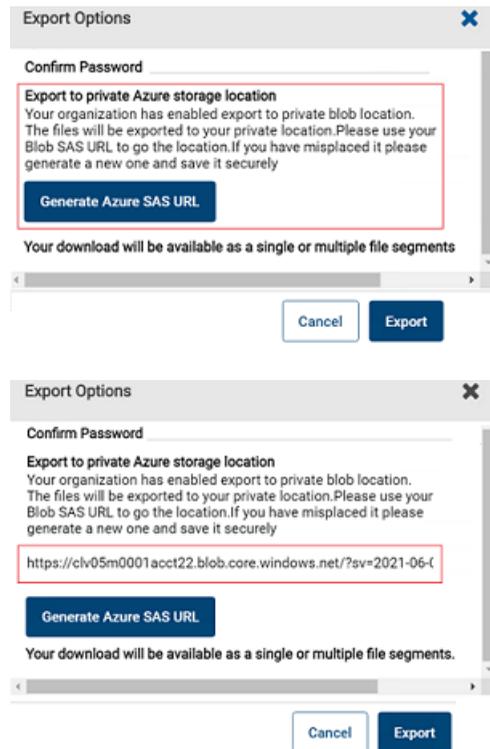
**Confirm Password**

Repeat the same password for confirmation.

**Generate Azure SAS URL**

**Note:** Users can see this button only if the **Export to Azure private storage location** feature in the Veritas Alta View Compliance and Governance Management Console is enabled for them. Users can export items to their private Azure Blob storage location.

Click **Generate Azure SAS URL** to get the Azure Blob SAS URL to access the location and save it for future use.



For security reasons, the application does not show this URL the next time. However, if the SAS URL is misplaced for any reason, click **Generate Azure SAS URL** again to generate a new SAS URL and save it securely.

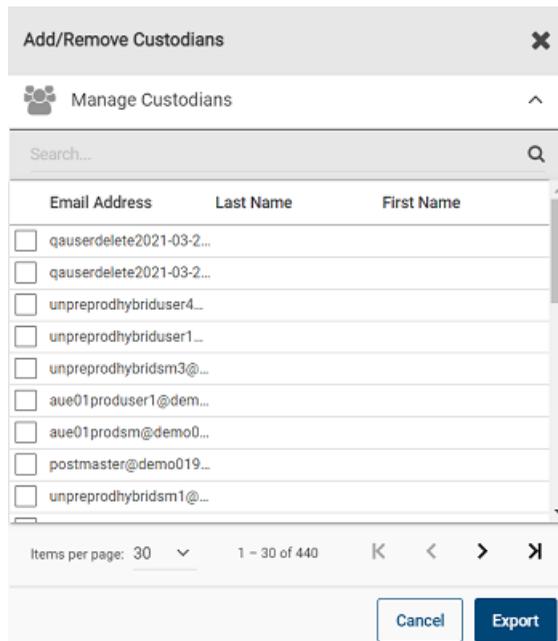
After you click **Export** on the **Export Options** dialog box, all the selected items are exported to the Azure private storage location. You can use Microsoft Storage Explorer to access the exported items.

**Share Export**

Click **Select Admin** to choose the recipients of this batch export and click **Update**.

**Note:** You need to manually share the Export Password with the administrators and follow all the security specific rules of the organization.

- 7 If you are exporting messages by custodians, in the **Add/Remove Custodians** dialog box, search for and select the custodians.

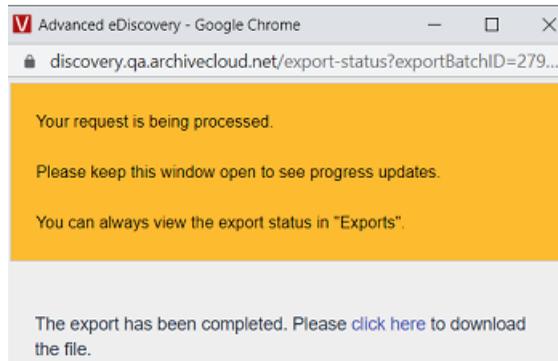


**8** Click **Export**.

---

**Note:** The exported batch can either gets downloaded as a single or multiple file segments.

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- 9** Click **Click here** to download the exported batch of messages.
- 10** To confirm the status of batch export, on the **eDiscovery** tab, under the selected case node, select **Exports**, and search this export batch name.

## Exporting a search summary report for collaboration messages

### To export a search summary report for messages during case review

- 1** On the **eDiscovery** tab, click **Cases**.
- 2** Search for and select the case in which you want to search emails.
- 3** The selected **Case\_Name** node appears below **Cases**.

- 4 Click **New Search** to create a new search. Else, expand **Research Sets** or **Review Sets** to select existing search.

You can access existing saved searches of the selected case from the **Review Set** and **Research Set** nodes. Alternatively, you can click **New Search**, specify a new criteria in the *Advanced Search* or the *Query Search* option to search for new emails for review.

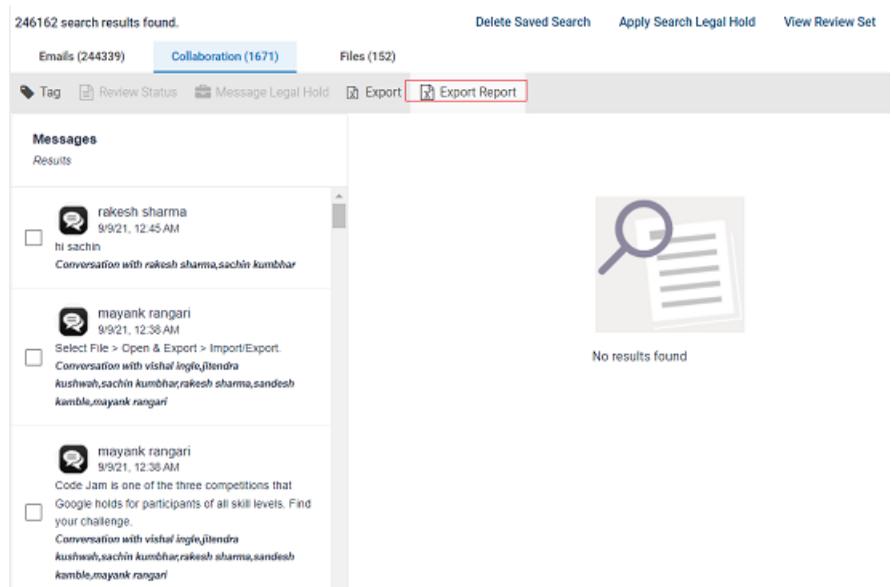
After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

- 5 On the **Collaboration** tab, and click **Export Report**.

---

**Note:** The following sample image is specific to a search in **Review Sets**. If you select the search from **Research Sets**, the application do not show the **Review Status** option on the action bar.

---



The application downloads the summary report (.xlsx) of the emails within search as a zipped (.zip) folder.

---

**Note:** If you select a search from **Review Sets**, and select any filter option and click **Apply**, the **Export Report** option remains disabled.

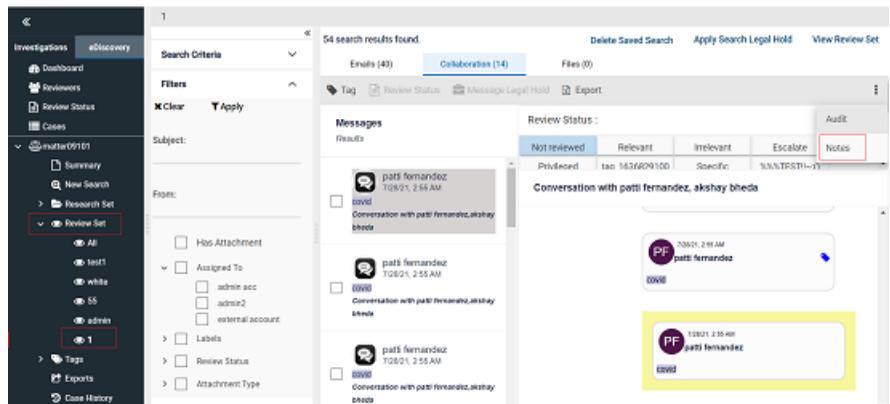
---

## Adding notes to collaborative messages

Reviewers can add notes to collaborative messages that are visible to other reviewers of that case. Notes are case-specific, therefore, a note that is applied to a collaborative messages in one case does not appear for the same collaborative messages in a different case. Notes can be provided to collaborative messages that are from the **Review Sets** only. You cannot provide notes to the collaborative messages that are from the **Research Set**.

### To add a note to a collaborative message

- 1 From the **eDiscovery** tab, select the **Cases** node to display the cases list in the main pane.
- 2 Select the required case from the cases list.  
 Under the **Cases** node in the left pane a **case\_name** node appears for the selected case.
- 3 Click the **case\_name** > **Review Sets**.
- 4 Select the required search under the Research Sets or the Review Sets node.
- 5 On the **Collaboration** tab, select the collaboration message to view its content in the message preview pane.
- 6 Click the **More options** icon and select **Notes**.



- 7 In the **Add Notes** dialog box, specify the note about this message.

- 8 Click **Add** to save the note.

---

**Note:** Different reviewers can add and save their notes for the same message. The application displays all the notes applied to the message that can be used for a collaborative reviews.

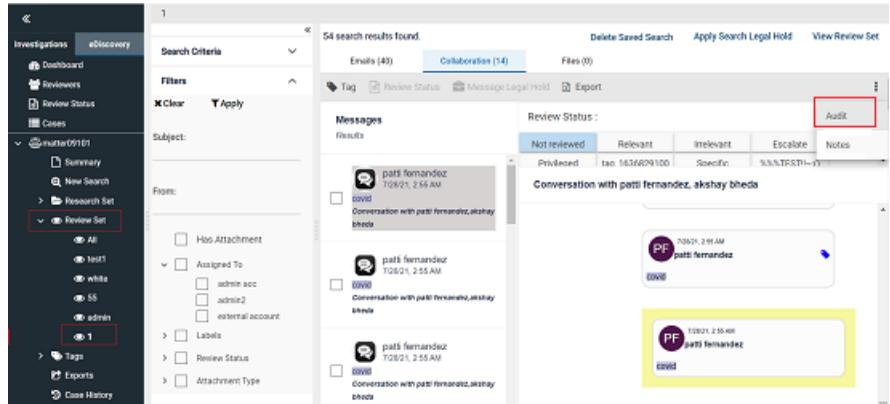
---

## Viewing audit history of collaborative messages

### To view the audit history of a collaborative message

- 1 From the **eDiscovery** tab, select the **Cases** node to display the cases list in the main pane.
- 2 Select the required case from the cases list.  
 Under the **Cases** node in the left pane a **case\_name** node appears for the selected case.
- 3 Click the **case\_name** > **Research Sets** or **Review Sets**.
- 4 Select the required search under the Research Sets or the Review Sets node.
- 5 On the **Collaboration** tab, select the collaboration message to view its content in the message preview pane.

**6** Click the **More options** icon and select **Audit**.



The application displays the audit history as shown in the following sample image.

The screenshot shows a browser window titled 'Advanced eDiscovery - Google Chrome' displaying an audit history table. The table has five columns: Action, User, Date, Before value, and After value. It lists several actions performed by user 'a a' and 'admin rs' on 11/2/2021 and 8/31/2021. At the bottom, there are navigation controls for 'Items per page: 30' and '1 - 5 of 5'.

Action	User	Date	Before value	After value
Review Set Search Result	a a	11/2/2021 2:14 AM		Not reviewed
Removed Label	admin rs	8/31/2021 1:28 PM	ABC	
Removed Label	admin rs	8/31/2021 1:28 PM	Personal	
Applied Label	admin rs	8/26/2021 5:35 AM		Personal
Applied Label	admin rs	8/24/2021 11:20 AM		ABC

**7** If required, use the navigation icons to go to the next page, previous page, the first page, and the last page.

## Reviewing files

The **Files** tab appears only if the OneDrive for Business service is enabled and the archive collector is configured for you. You can review all the files that are coming

from the OneDrive for Business. While reviewing the messages, you can perform the following actions:

- Toggle between the original format and the plain text format of the file
- Applying tags
- Applying Legal hold
- Applying review status
- Exporting files
- Adding notes
- Viewing audit history
- Downloading messages

## Accessing files for review

### To access files for review

- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Search for and select the case in which you want to search files.
- 3 The selected **Case\_Name** node appears below **Cases**.
- 4 Click **New Search** to create a new search. Else, expand **Research Sets** or **Review Sets** to select existing search.

You can access existing saved searches of the selected case from the **Review Set** and **Research Set** nodes. Alternatively, you can click **New Search**, specify a new criteria in the *Advanced Search* or the *Query Search* option to search for new files for review.

After performing a new search or accessing the existing searches from Review set and Research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

- 5 Click the **Files** tab to view the files for your review.
- 6 Select a file to view its details in the native view in the **Preview** pane.
- 7 Click **Native View** and **Text View** to toggle between the original file format and the plain text format respectively.

## Applying tags to Files

### To apply tags to the files during case review

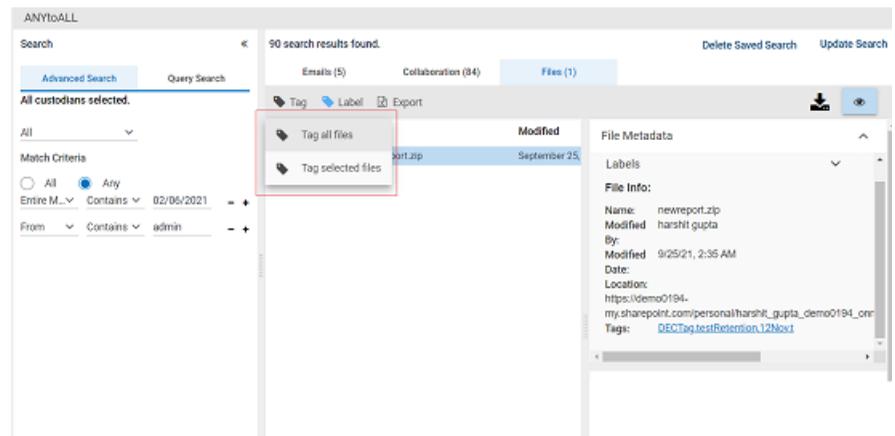
- 1 From the **eDiscovery** tab, select the **Cases** node to display the cases list in the main pane.
- 2 Select the required case from the cases list.  
 Under the **Cases** node in the left pane a **case\_name** node appears for the selected case.
- 3 Click the **case\_name** > **Research Sets** or **Review Sets**.
- 4 Select the required search under the Research Sets or the Review Sets node.
- 5 On the **Files** tab, select the files to which you want to apply tags.

---

**Note:** Before you apply tags to the files, you can view the previously applied tags and classification tags of the files in the preview pane.

---

- 6 On the action menu, click **Tag**, and do any of the following as required.
  - To tag all the files in the search, click **Tag all files**.
  - To tag only the selected files, click **Tag selected files**.



**7** In the **Add Tag** dialog box, do the following:

Tag Name	Enter a new unique tag name.
Comments	Provide a comment or a description for the tag name.
Legal Hold	Select this check box if you want to apply the legal hold on the files.
Select retention Tag	<p>Instead of applying a new tag, you can apply the retention tags that are created in Veritas Alta Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply.</p> <p>After you select this option, the application disables the <b>Tag Name</b> field.</p>

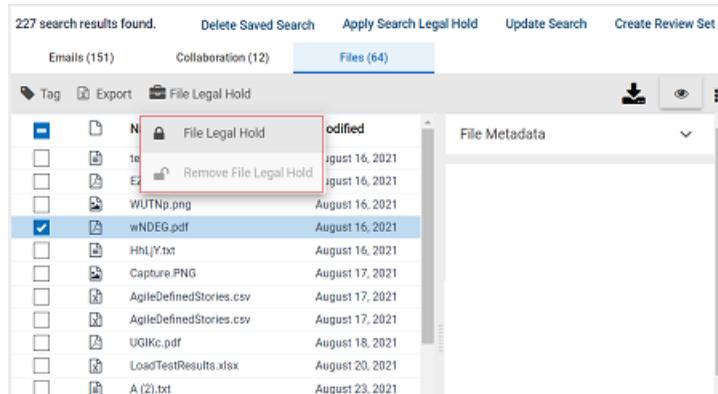
**8** Click **Tag**.

After you apply tags to the files, these tagged files are available under the respective tags under the **Tags** node.

## Applying or removing legal hold to files

### To apply or remove legal hold to the files during case review

- 1 From the **eDiscovery** tab, select the **Cases** node to display the cases list in the main pane.
- 2 Select the required case from the cases list.  
 Under the **Cases** node in the left pane a **case\_name** node appears for the selected case.
- 3 Click the **case\_name** > **Research Sets** or **Review Sets**.
- 4 Select the required search under the Research Sets or the Review Sets node.
- 5 In the right pane, on the **Files** tab, select the files to which you want to apply legal hold.
- 6 On the action menu, click **File Legal Hold**, and do any of the following as required.
  - To apply legal hold to the selected files, click **File Legal Hold**.
  - To remove previously applied legal hold, click **Remove File Legal Hold**.



## Applying and removing review status to files

Case reviewers can apply one of the following default review status to files to indicate its status in the eDiscovery review process:

- **Not reviewed**
- **Escalate**
- **Irrelevant**

- **Privileged**
- **Redact**
- **Relevant**

In addition, the eDiscovery Administrators can customize the available review status.

#### To apply and remove review status to a file

- 1 Under the associated case, select **Review Set**, and open the corresponding review set node.
- 2 To apply a review status to one or more files directly from the **Review Set**:
  - Select the check box for one or more files in the list. In the preview pane, click **Review Status**.
  - Then select the required review status.  
To remove the applied review status, click the selected review status again.
- 3 To apply a review status to a file while you view its details:
  - Select the file from the **Review Set** list to display its details.  
The review status are shown at the top of the preview pane that displays the details of the message.
  - Select the required review status from the available options.  
To remove the applied review status, click the selected review status again.

---

**Note:** To view collaboration messages based on their review status, you can filter the required review status node under the **Filter** section.

---

## Exporting files

#### To export files

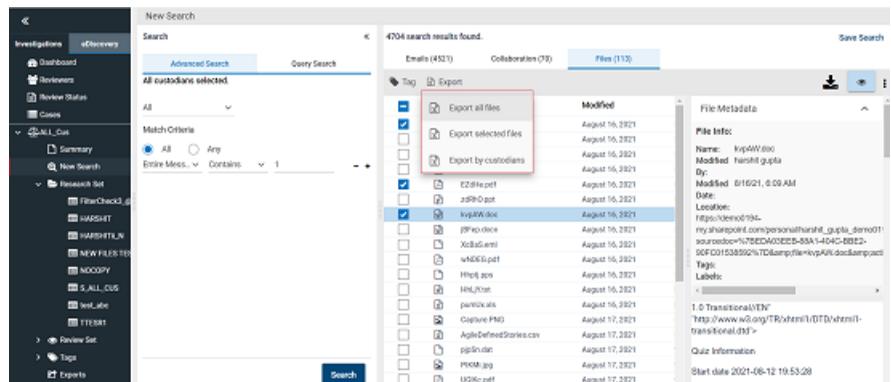
- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Search for and select the case in which you want to search files.  
The selected **Case\_Name** node appears below **Cases**.

- 3 Click **New Search** to create a new search. Else, expand **Research Sets** or **Review Sets** to select existing search.

**Note:** You can access existing saved searches of the selected case from the **Review Set** and **Research Set** nodes. Alternatively, you can click **New Search**, specify a new criteria in the *Advanced Search* or the *Query Search* option to search for new files for review.

After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

- 4 In the right pane, on the **Files** tab, select the files you want to export.
- 5 Click **Export**, and do any of the following:
  - Click **Export all files** to export all the files available search.
  - Click **Export selected files** to export all the selected files from the search.
  - Click **Export by custodians** to export all the files from the selected custodians.



- 6 If you are exporting all or selected files, in the **Export Options** dialog box, do the following:

**Export Options**
✕

You have selected 1 item(s).

Please select additional export options:

<b>Message Format</b>	JSON <span style="float: right;">▼</span>
<b>Enable AES-256 Encryption</b>	<input type="checkbox"/>
<b>Exclude Exported Messages</b>	<input checked="" type="checkbox"/>
<b>Export Name</b>	TEstingCount2
<b>Export Password</b>	<input type="text"/>
<b>Confirm Password</b>	<input type="text"/>
<b>Share Export</b>	<div style="display: flex; align-items: center;"> <div style="background-color: #0056b3; color: white; padding: 2px 10px; border-radius: 3px;">Select External Reviewer(s)</div> <span style="margin-left: 5px;">▼</span> </div>

Cancel

Export

**Message Format**

The available message formats are:

- JSON
- EDRM Only

Select the appropriate message format to export the batch. By default, it is JSON.

**Exclude Exported Messages**

Select this option to exclude the exported messages.

**Enable AES-256 Encryption**

Select this check-box if you want to secure the access of the downloaded export batch.

**Export Name**

Provide the name for the batch you want to export. By default, it takes the Search Name. You can change it if required.

**Export Password**

Enter the password that you want end user to provide when they access this exported batch of messages.

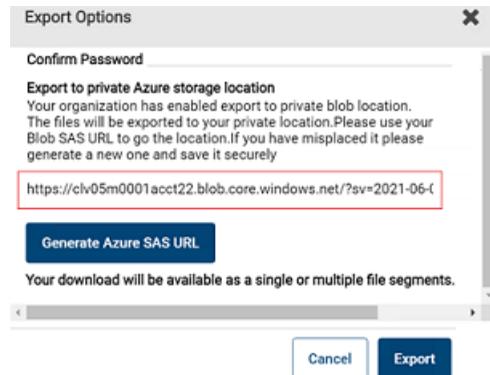
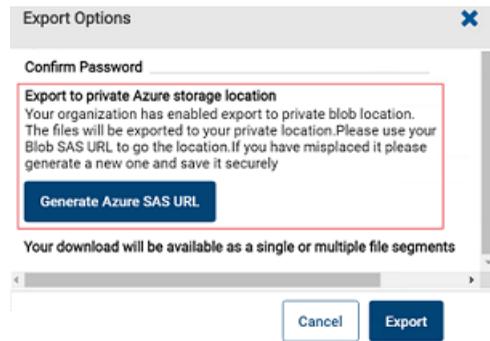
**Confirm Password**

Repeat the same password for confirmation.

**Generate Azure SAS URL**

**Note:** Users can see this button only if the **Export to Azure private storage location** feature in the Veritas Alta View Compliance and Governance Management Console is enabled for them. Users can export items to their private Azure Blob storage location.

Click **Generate Azure SAS URL** to get the Azure Blob SAS URL to access the location and save it for future use.



For security reasons, the application does not show this URL the next time. However, if the SAS URL is misplaced for any reason, click **Generate Azure SAS URL** again to generate a new SAS URL and save it securely.

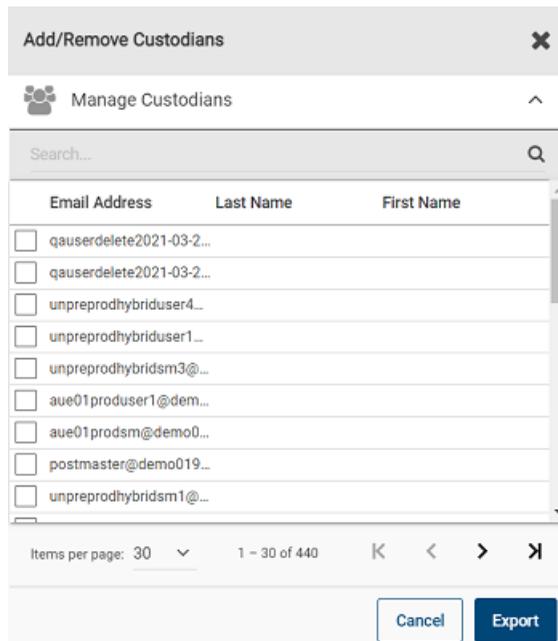
After you click **Export** on the **Export Options** dialog box, all the selected items are exported to the Azure private storage location. You can use Microsoft Storage Explorer to access the exported items.

**Share Export**

Click **Select Admin** to choose the recipients of this batch export and click **Update**.

**Note:** You need to manually share the Export Password with the administrators and follow all the security specific rules of the organization.

- 7 If you are exporting files by custodians, in the **Add/Remove Custodians** dialog box, search for and select the custodians.

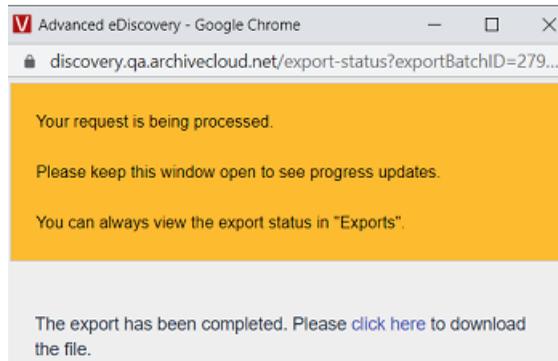


**8** Click **Export**.

---

**Note:** The exported batch can either gets downloaded as a single or multiple file segments.

---



**9** Click **Click here** to download the exported batch of files.

**10** To confirm the status of batch export, on the **eDiscovery** tab, under the selected case node, select **Exports**, and search this export batch name.

## Exporting a search summary report for files

### To export a search summary report for files during case review

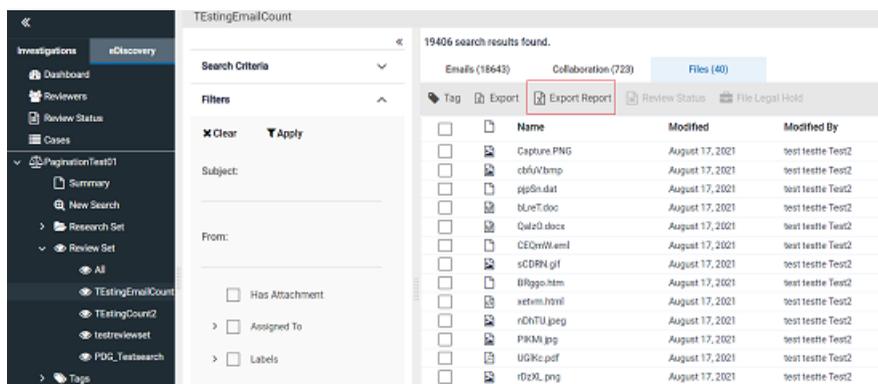
- 1** On the **eDiscovery** tab, click **Cases**.
- 2** Search for and select the case in which you want to search emails.
- 3** The selected **Case\_Name** node appears below **Cases**.
- 4** Expand **Research Sets** or **Review Sets** to select existing search.

- 5 Select the filter options and click **Apply**.
- 6 On the **Files** tab, and click **Export Report**.

---

**Note:** The following sample image is specific to a search in **Review Sets**. If you select the search from **Research Sets**, the application do not show the **Review Status** option on the action bar.

---



The application downloads the summary report (.xlsx) of the emails within the search as a zipped (.zip) folder.

---

**Note:** If you select a search from **Review Sets**, and select any filter option and click **Apply**, the **Export Report** option is not displayed.

The **Export Report** functionality is not available for the searches in **New Search**.

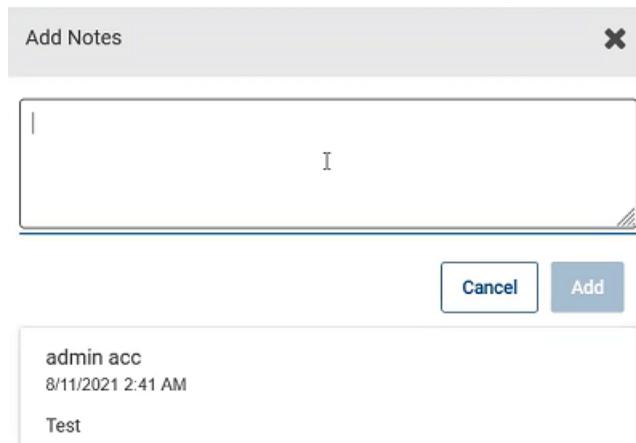
---

## Adding notes to files

Reviewers can add notes to files that are visible to other reviewers of that case. Notes are case-specific, therefore, a note that is applied to a files in one case does not appear for the same file in a another case. Notes can be provided to files that are from the **Review Sets** only. You cannot provide notes to the files that are from the **Research Set**.

**To add a note to a file**

- 1 From the **eDiscovery** tab, select the **Cases** node to display the cases list in the main pane.
- 2 Select the required case from the cases list.  
 Under the **Cases** node in the left pane a **case\_name** node appears for the selected case.
- 3 Click the **case\_name > Review Sets**.
- 4 Select the required search under the Review Sets node.
- 5 On the **Files** tab, select the file to view its content in the preview pane.
- 6 Click the **More options** icon and select **Notes**.
- 7 In the **Add Notes** dialog box, specify the note about this file.



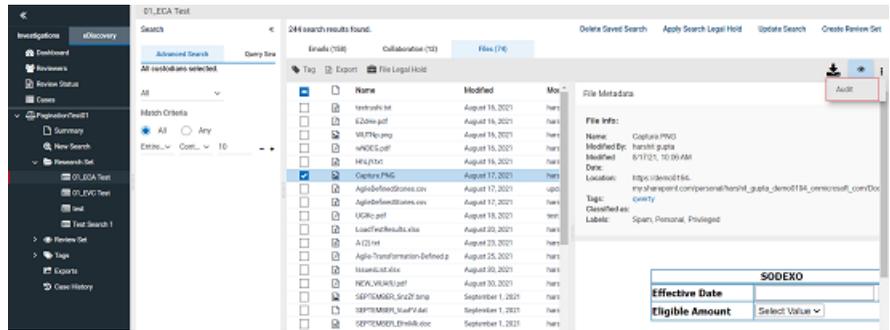
- 8 Click **Add** to save the note.

## Viewing audit history of files

**To view the audit history of a file**

- 1 From the **eDiscovery** tab, select the **Cases** node to display the cases list in the main pane.
- 2 Select the required case from the cases list.  
 Under the **Cases** node in the left pane a **case\_name** node appears for the selected case.

- 3 Click the **case\_name** > **Research Sets** or **Review Sets**.
- 4 On the **Files** tab, select the file to view its content in the preview pane.
- 5 Click the **More options** icon and select **Audit**.



- 6 The application displays the audit history as shown in the following sample image.

The screenshot shows the audit history table in the eDiscovery application. The table has columns for Action, User, Date, Before value, and After value. The data is as follows:

Action	User	Date	Before value	After value
Review Set Search Result	a a	11/2/2021 2:14 AM		Not reviewed
Removed Label	admin rs	8/31/2021 1:28 PM	ABC	
Removed Label	admin rs	8/31/2021 1:28 PM	Personal	
Applied Label	admin rs	8/26/2021 5:35 AM		Personal
Applied Label	admin rs	8/24/2021 11:20 AM		ABC

At the bottom of the table, there is a pagination control showing 'Items per page: 30' and '1 - 5 of 5' with navigation arrows.

- 7 If required, use the navigation icons to go to the next page, previous page, the first page, and the last page.

## Downloading files

### To download a file

- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Search for and select the case in which you want to search files.
- 3 The selected **Case\_Name** node appears below **Cases**.
- 4 Click **New Search** to create a new search. Else, expand **Research Sets** or **Review Sets** to select existing search.

You can access existing saved searches of the selected case from the **Review Set** and **Research Set** nodes. Alternatively, you can click **New Search**, specify a new criteria in the *Advanced Search* or the *Query Search* option to search for new files for review. After performing a new search or accessing the existing searches from Review set and Research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

- 5 Click the **Files** tab to view the files for your review.
- 6 Select the file to view its details in the **Preview** pane.
- 7 Click **Native View** and **Text View** to toggle between the original file format and the plain text format respectively.
- 8 Click the **Download** icon to save copy of a file on your local computer.

## Annotating and redacting email and file content in native viewer

### Annotations

Depending on your review requirements, you can add text and shape annotations to a document. For example, you can annotate the text or area with arrows, lines, boxes, stamps and then customize the line size, color, and fill color. You can also add comments for other users of the document. These annotations can be viewed and edited by other users for which you might need appropriate permissions. You can print and download such annotations for further use.

### Redactions

Depending on your review requirements, you can draw dark rectangles to hide sensitive information within a document to avoid a confidentiality breach. You can determine the transparency level of such dark rectangles as required. When you print the document, you can permanently add these redactions over the content or entire page, and provide reasons for redactions. You can print and download such redactions for further use.

See [“About annotations and redactions”](#) on page 280.

# Managing production sets

This chapter includes the following topics:

- [About Production Sets](#)
- [Moving items to production sets](#)
- [Removing items from a production set](#)
- [Locking and unlocking production sets](#)
- [Configuring production set export options](#)
- [Exporting production sets](#)

## About Production Sets

The Production Set feature in Alta eDiscovery supports legally defensible Productions. Users can perform the following activities while managing the production sets:

- Creating production sets
- Adding items to new and existing production sets
- Removing the items from production sets
- Reviewing the items of the production sets
- Annotating and redacting the content and attachments
- Applying redaction reasons to the annotated and redacted content/area
- Locking the production sets
- Exporting Production Set documents with specified templates

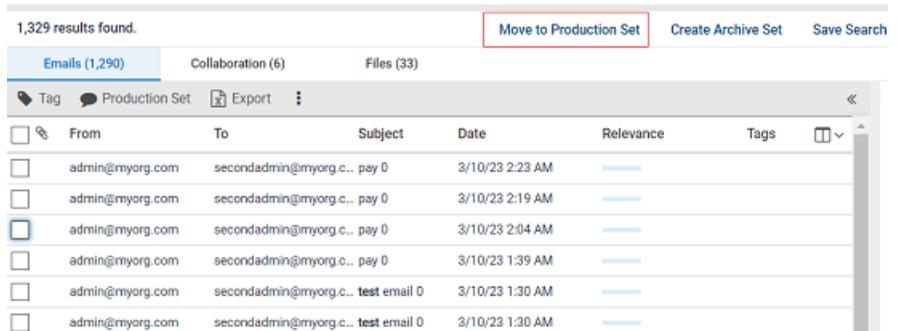
In nutshell, the production sets assume that all reviewed, tagged, and relevant documents will be produced and shared for legal defense.

## Moving items to production sets

You can move emails, collaboration messages, and files to the unlocked production sets only, and not to the locked production sets. You need to unlock the production sets before moving these items to the locked production sets.

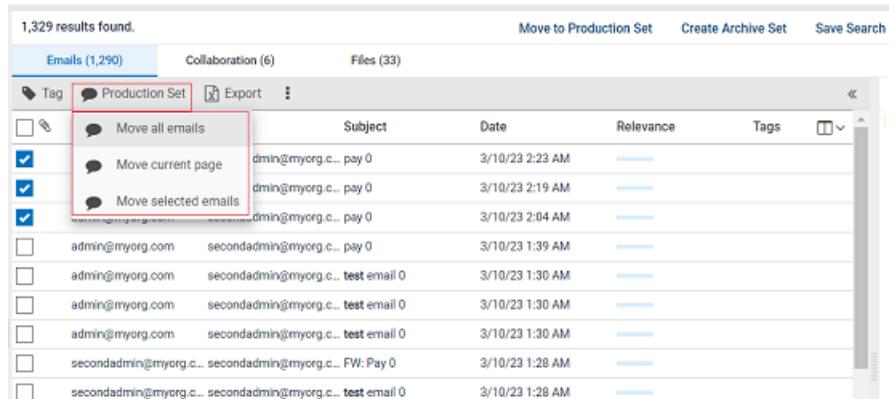
### To move items to production sets

- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Search for and select the case in which you want to search items.  
 The selected **Case\_Name** node appears below **Cases**.
- 3 Click **New Search** to create a new search. To select existing saved searches, expand **Research Sets** or **Review Sets** and select a required search.
- 4 Perform advanced search or query search to get the expected items. See [“Performing Advanced Search and Query Search”](#) on page 312.
- 5 To move all the emails, collaboration messages, and files from the result, click **Move to Production Set**.



- 6 To move emails only, on the **Emails** tab, select the emails you want to include in the production set. Click **Production Set**, and do any of the following as required:
  - Click **Move all emails** to include all the emails available in the search.
  - Click **Move current page** to include all the emails displayed on the selected page.

- Click **Move selected emails** to include all the selected emails from the search.



- 7 To move collaboration messages only, on the **Collaboration** tab, select the messages you want to include in the production set.  
 Click **Production Set**, and do any of the following:
  - Click **Move all messages** to include all the collaboration messages available in the search.
  - Click **Move selected messages** to include all the selected collaboration messages from the search.
- 8 To move files only, on the **Files** tab, select the files you want to include in the production set.
  - Click **Move all files** to include all the files available in the search.
  - Click **Move selected files** to include all the selected files from the search.

- 9 In the **Production Set** dialog box, do the following:

**New Production Set**

Select this option if you want to move the selected emails in a new production set. This option is selected by default.

In the **Production Set Name** field, enter a unique name for this production set.

In the **Description** field, enter a brief description of the production set.

**Existing Production Set**

In the **Production Set Name** drop-down list, you can view only the unlocked production sets. You can not move emails to the locked production set.

In the **Production Set Name** drop-down list, select a set to which you want to move (add) the selected emails.

The description of the selected production set appears for your reference.

- 10 Click **Submit**.

If you have created a new production set, the application displays the *Production set created successfully* message. This newly created production set gets listed under **eDiscovery** tab > **Cases** > *Case\_Name* > **Production Set**.

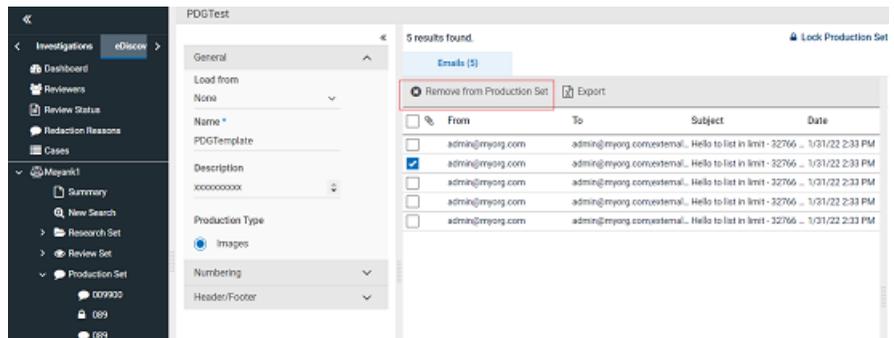
If you have moved the items to an existing production set, the application displays the *Production set updated successfully* message.

# Removing items from a production set

You can remove items from the unlocked production sets only, and not from the locked production sets. You need to unlock the production sets before removing items from the locked production sets.

## To remove items from a production set

- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Search for and select the case from which you want to add or remove items.  
 The selected **Case\_Name** node appears below **Cases**.
- 3 From the displayed case nodes, select **Production Sets**.  
 A list of available production sets of this case are displayed.
- 4 Select the unlocked production set from which you want to remove items.
- 5 Select items you want to remove, and click **Remove from Production Set**.



The application prompts you to confirm that you want to perform the operation.

- 6 Click **Yes**.

The application displays the **Email(s) removed from Production Set successfully** message.

# Locking and unlocking production sets

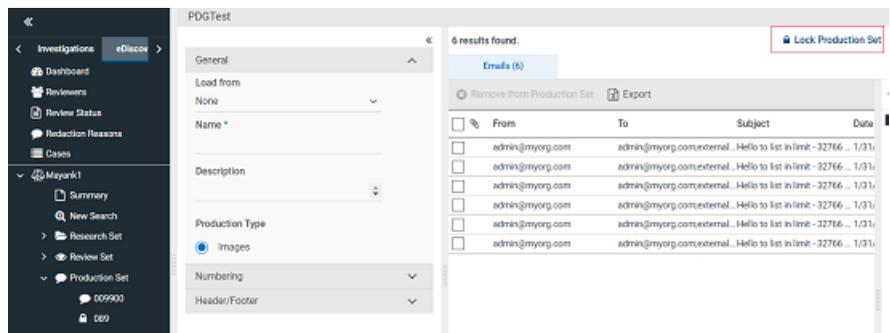
You can lock production sets to disable some of the features such as add or remove items, add or remove annotations and redactions, and update production export options. To perform all these actions, you must unlock these production sets.

### To lock a production set

- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Search for and select the case in which you want to lock the production set before exporting it.

The selected **Case\_Name** node appears below **Cases**.

- 3 From the displayed case nodes, select **Production Sets**.  
 A list of available production sets of this case are displayed.
- 4 Select the unlocked production set that you want to lock.
- 5 Click **Lock Production Set**.



The application displays the **Production Set Locked** message.

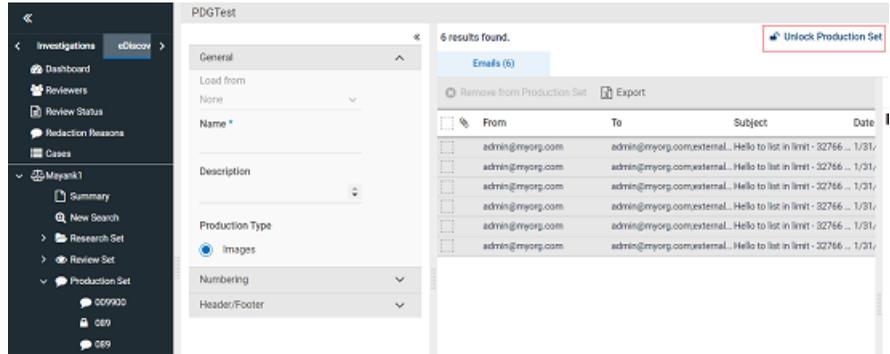
### To unlock a production set

- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Search for and select the case in which you want to lock the production set before exporting it.

The selected **Case\_Name** node appears below **Cases**.

- 3 From the displayed case nodes, select **Production Sets**.  
 A list of available production sets of this case are displayed.

- 4 Select the locked production set that you want to unlock.
- 5 Click **Unlock Production Set**.



The application displays the **Production Set Unlocked** message.

## Configuring production set export options

You can specify the production set export options in the tabbed area at any time before running the production set export. This section also explains how can you create and apply the templates for productions sets.

### To configure the export options before exporting the production set

- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Search for and select the case in which you want to configure a production set export options before exporting it.

The selected **Case\_Name** node appears below **Cases**.

- 3 From the displayed case nodes, select **Production Sets**.

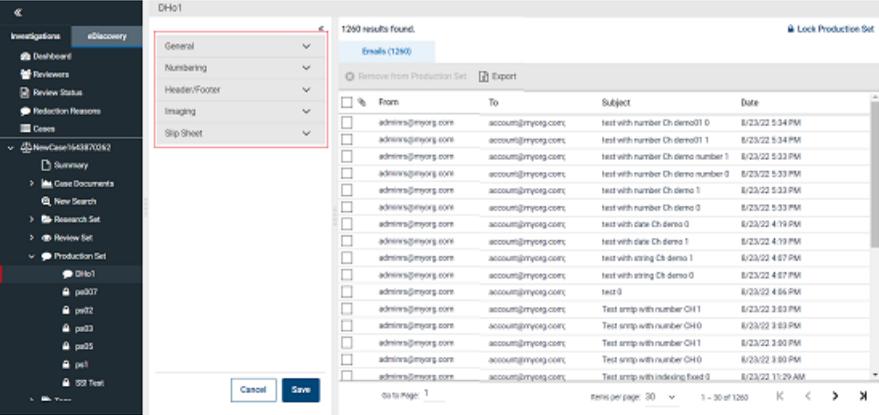
A list of available production sets of this case are displayed.

- 4 Select the production set for which you want to configure the export options before export.

The application displays the following configuration options:

- General
- Numbering
- Header/Footer
- Imaging

■ Slip Sheet



5 Under **General**, specify the following:

- Load from** From the drop-down list, select a previously created export template format. If you select the previously created template, all the previously configured fields appear automatically.
- Name** If you want to create a new setting, that can be later used as template, provide a name for the current setting. Till the time you do not create a template of this setting, this setting remains intact. When you open the production set, the application displays the lastly saved setting. If you save this setting as a template, this name is considered as a new template name, and this template name is listed under the **Load from** drop-down options.
- Description** Provide a brief description for the current setting.
- Production Type** Select this option to produce all documents as image files.

**6** Under **Numbering**, specify the following values:

The following example shows the specified format.

The sample ITEM-0000012-001 shows the prefix ITEM-, numbering that includes 7 digits starting with the number 12, and a suffix of -001.

Prefix	The settings on this tab associate a production number with a corresponding document when the production is run. Specify the document numbering for the production. If required, include a delimiter at the end.
Minimum number of digits	Specify the minimum number of digits for numbering the documents. The number is padded with zeros, if needed to match the minimum.
Starting number	Specify the starting number for the numbered list of documents.  <b>Note:</b> The product ensures that the same production number (combination of prefix and number) is not used multiple times on the same case. If the number you specify is below the minimum allowed number for that prefix, the next valid number is displayed.
Suffix	Specify a suffix for the numbered list with a delimiter, if required.

**7** Under **Header/Footer**, specify the following:

Header	Choose the information to present for the left, center, and right headers. Select from the following items: <ul style="list-style-type: none"> <li>■ None (no entry)</li> <li>■ Bates Number</li> <li>■ Author</li> <li>■ Date produced</li> <li>■ Document ID</li> <li>■ Free Text</li> <li>■ Filename</li> <li>■ Page Number</li> <li>■ Page X of Y</li> </ul>
Footer	Choose the information to present for the left, center, and right headers. All the options are same as options in the header field.

Watermark                      Type the word or words you want to appear as a watermark on the pages of the production.

**8** Under **Imaging**, specify the following:

Slip sheet by Maximum Limits      Items that exceed these maximum limits produce a slip sheet and are not imaged.

- **Page Count:** Specify number of pages after which a slip sheet will be produced.
- **File Size:** Specify maximum size of the file (in MB) after which a slip sheet will be produced.

**9** Under **Slip Sheet**, specify the following:

Customizable Slip Sheet Text      This option allows you to customize slip sheets with various fields which can assist in identifying exceptions. Each slip sheet will receive a bates number and the specified text will be printed in the center of the slip sheet (which is created for all items that are not imaged). The maximum length allowed for this field is 1,024 characters.

- **%DocID:** Document ID.
- **%FileName:** File name of the item
- **%FileExtension:** File extension of the item
- **%BatesStart:** Starting Bates number

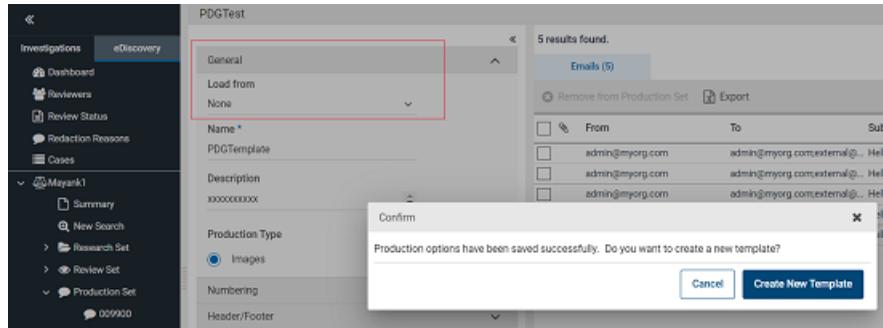
When produced, a slip sheet is a placeholder for any item not rendered for one of the reasons below.

- **Fully Redacted** - Item was Redacted completely
- **Imaging Error** - Unable to create image of item during production
- **Conversion Error** - Image failed to convert to PDF
- **Native Placeholder** - Bates stamped Native placeholder

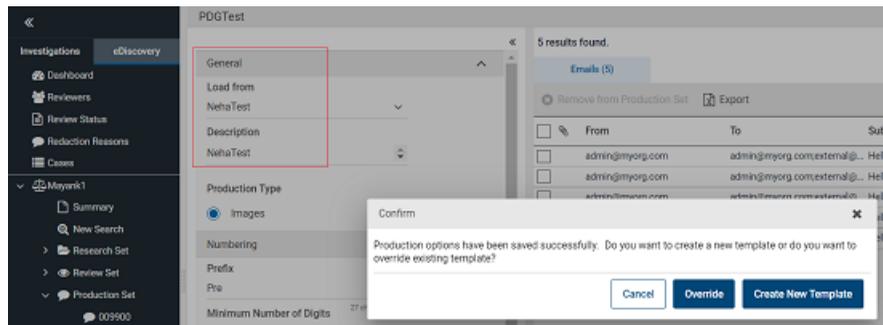
You can apply your customized slip sheet settings either by changing the text while creating the production folder, or at case level, by changing the values of the properties.

**10** Click **Save**, and do any of the following options as required.

- If, under **General**, you have not selected the previously saved template in the **Load from** field, the application displays the following message:



- Click **Cancel** to save the settings without creating a new template. The application saves and displays this setting whenever you access the production set. You can modify this setting whenever required, and save it as a template for further use.
- Click **Create New Template** to save the current setting as a new template. This template name is then displayed under the **Load from** field.
- If, under **General**, you have selected the previously saved template in the **Load from** field, the application displays the following message:



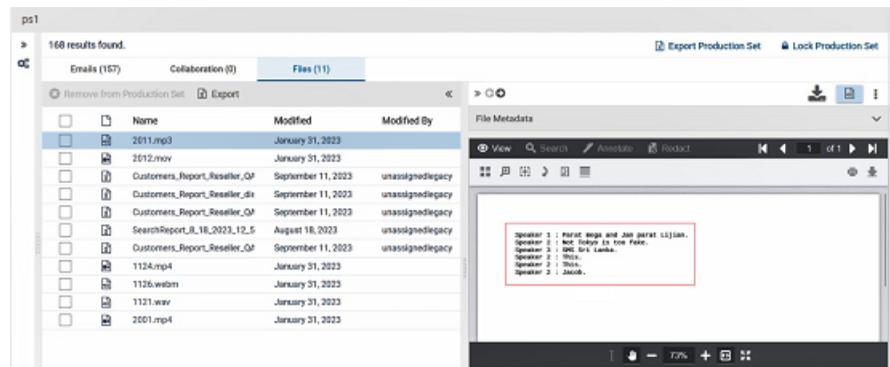
- Click **Override** to update the selected template for the current settings
- Click **Create New Template** to save the current setting as a new template. This template name is then displayed under the **Load from** field.

# Exporting production sets

Alta eDiscovery allows you to efficiently export content in a variety of formats so that it can be presented to legal parties or ingested by other third party legal applications. Flexible export options make it easy to prepare, process and customize your documents and export options as a single production set.

The production set export is a system-generated file that contains several documents related to the case. You can add emails, collaboration messages, and files to a production set at any time until the production set is locked. After you lock the production set, to add new emails, collaboration messages, and files to this set, you need to first unlock the production set and then lock it again manually. When you click **Export** without locking the production set, the application automatically locks the production set to be exported.

**Note:** If the production set includes audio-video files and you intend to export it, these audio-video files cannot be exported in their original format. Only the AI transcripts of these files are exportable in PDF format. However, you can apply annotations and redactions to these PDF files for review purposes. Refer to the sample image of exported AI transcript file.



You can create individual production sets for emails, collaboration messages, and files. You can also export a collective production set that includes emails, collaboration messages, and files. After the export is successfully completed, you can download the exported zip file. The zip file consists of imaged files of the items, native files, metadata in the CSV format as shown in the sample image below.

Name	Type
images	File folder
native	File folder
text	File folder
edrmXML.xml	Microsoft Edge HTML Do...
metadata.csv	Microsoft Excel Comma S...

The metadata file in the exported zip file captures the details like Bates Number, Document Type, subjects, sender and receiver, attachments if any, and image/native/text file paths. For a collective production set, the sequence of the document type is emails first, then collaboration messages, and lastly files as shown in the sample image below.

	A	B	C	D
1	BatesNumber	DocumentType	Subject	From
2	"pre00001suff"	Emails	test with number Ch demo01 1	adminrs@myorg.com
3	"pre00002suff"	Emails	test with number Ch demo01 0	adminrs@myorg.com
4	"pre00003suff"	Emails	The reassignment batch is completed.	donotreply@liveoffice.com
5	"pre00004suff"	Emails		
6	"pre00006suff"	Collaboration		pattif@bhedaakshay.onmicros
7	"pre00007suff"	Collaboration		pattif@bhedaakshay.onmicros
8	"pre00008suff"	Collaboration		
9	"pre00017suff"	Files		unassignedlegacy@myorg.com
10	"pre00018suff"	Files		unassignedlegacy@myorg.com

## Exporting an individual production set for emails, collaboration messages, or files

**To export an individual production set for emails, collaboration messages, or files**

- 1 On the **eDiscovery** tab, select the case under which the production set is created.

Under the **Cases** node in the left pane, a **case\_name** node appears for the selected case. This node contains a number of sub-nodes that provide details of the case as follows. The available options depend on your permissions:

- 2 Expand **Production Sets** and select the set you want to export.

The emails, collaboration messages, and files are displayed under respective tabs.

- 3 Based on your requirement, select the **Emails**, **Collaboration**, or **Files** tab.

---

**Note:** On the **Files** tab, the application does not display a preview of file content if the file type of the selected file is not supported by the native viewer. In such scenarios, the application notifies that the PrizmDoc tool does not support the specific file type.

---

- 4 Configure the production options before you export the production set. See [“Configuring production set export options”](#) on page 267.
- 5 Click **Export**.

- 6 In the **Production Set Export Options** dialog box, specify the following details, and click **Export**.

- |                  |  |
|------------------|--|
| Export Name      | By default, this field displays the name of the selected production set. However, you can change this name and provide another unique name.<br><br>You can search this name under <b>Exports &gt; Production Sets</b> after successful export.   |
| Export Password  | Enter the strong password to protect the export file.  |
| Confirm Password | Retype the same password for confirmation.   |
| Image Format     | Select this option to choose output format of the documents. For now, the document is published in the PDF format.   |
| Markup Type      | Select this option to include redactions and annotations during export.<br><br>Select the <b>Redactions</b> checkbox to include the redactions in the export document. You can export the redacted area as an Opaque or a Transparent area.<br><br>Select the <b>Annotations</b> checkbox to include the annotations in the export document. |

Include Extracted Text	Select this option to include the actual text of the documents in a text file. For redacted documents, only non-redacted text will be included in the extracted text.
Include EDRM Metadata File	Select this option to preserve and export the EDRM XML output file.
Include Natives	Select this option if you want to export all supported files in their native format.

**7** Click **Export**.

**8** To view the status of exported production set and download the zip file, in the left navigation, select **Exports > Production Sets**. After the export is completed, do the following:

- Expand the production set row to view its details.
- Click the **Download** icon to download the zip file that contains exported emails, collaboration messages, or files.

## Exporting a collective production set for emails, collaboration messages, and files

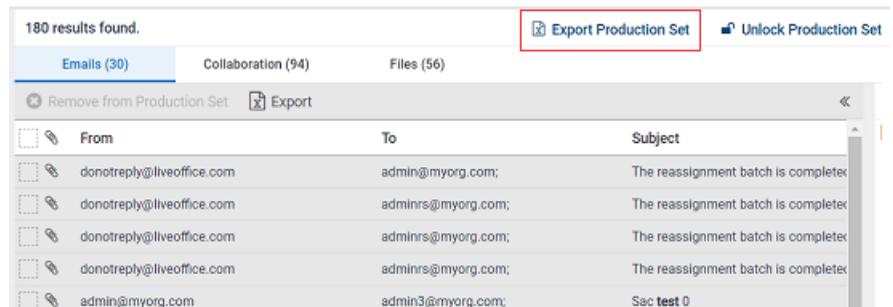
### To export a collective production set for emails, collaboration messages, and files

- 1 On the **eDiscovery** tab, select the case under which the production set is created.

Under the **Cases** node in the left pane, a **case\_name** node appears for the selected case. This node contains a number of sub-nodes that provide details of the case as follows. The available options depend on your permissions:

- 2 Expand **Production Sets** and select the set you want to export.

The emails, collaboration messages, and files are displayed under respective tabs.



- 3 Click **Export Production Set**.

The export file includes all emails, collaboration messages, and files in this production set.

- 4 Configure the production options before you export the production set. See [“Configuring production set export options”](#) on page 267.
- 5 Click **Export**.

- 6 In the **Production Set Export Options** dialog box, specify the following details, and click **Export**.

- |                  |  |
|------------------|--|
| Export Name      | By default, this field displays the name of the selected production set. However, you can change this name and provide another unique name.<br><br>You can search this name under <b>Exports &gt; Production Sets</b> after successful export.   |
| Export Password  | Enter the strong password to protect the export file.  |
| Confirm Password | Retype the same password for confirmation.   |
| Image Format     | Select this option to choose output format of the documents. For now, the document is published in the PDF format.   |
| Markup Type      | Select this option to include redactions and annotations during export.<br><br>Select the <b>Redactions</b> checkbox to include the redactions in the export document. You can export the redacted area as an Opaque or a Transparent area.<br><br>Select the <b>Annotations</b> checkbox to include the annotations in the export document. |

- |                            |   |
|----------------------------|---|
| Include Extracted Text     | Select this option to include the actual text of the documents in a text file. For redacted documents, only non-redacted text will be included in the extracted text. |
| Include EDRM Metadata File | Select this option to preserve and export the EDRM XML output file.   |
| Include Natives            | Select this option if you want to export all supported files in their native format.  |

**7** Click **Export**.

**8** To view the status of exported production set, in the left navigation, select **Exports > Production Sets**.

# Annotating and redacting content in native viewer

This chapter includes the following topics:

- [About annotations and redactions](#)
- [Native viewer capabilities](#)
- [Understanding the native viewer interface](#)
- [Annotating email and file content](#)
- [Redacting email and file content](#)
- [Printing the annotated and redacted document](#)
- [Downloading the annotated and redacted document](#)

## About annotations and redactions

### Annotations

Depending on your review requirements, you can add text and shape annotations to a document. For example, you can annotate the text or area with arrows, lines, boxes, stamps and then customize the line size, color, and fill color. You can also add comments for other users of the document. These annotations can be viewed and edited by other users for which you might need appropriate permissions. You can print and download such annotations for further use.

### Redactions

Depending on your review requirements, you can draw dark rectangles to hide sensitive information within a document to avoid a confidentiality breach. You can determine the transparency level of such dark rectangles as required. When you

print the document, you can permanently add these redactions over the content or entire page, and provide reasons for redactions. You can print and download such redactions for further use.

Before you annotate or redact items, it is recommended to read the following sections.

See “[Understanding the native viewer interface](#)” on page 281.

See “[Annotating email and file content](#)” on page 282.

See “[Redacting email and file content](#)” on page 286.

See “[Printing the annotated and redacted document](#)” on page 290.

See “[Downloading the annotated and redacted document](#)” on page 292.

## Native viewer capabilities

Veritas Advanced Discovery uses Native Viewer that provides a powerful document viewing and document conversion functionality. Native Viewer includes an advanced HTML Viewer control which allows users to view, search, annotate, redact, print, and download documents right in their HTML5 browser. It does not require to install any custom software, such as Active-X.

**Native view** provides the ability to review documents in their native format without requiring each application to be loaded on a reviewer’s workstation. Both text search and hit highlighting are available within the native view that increases reviewer productivity.

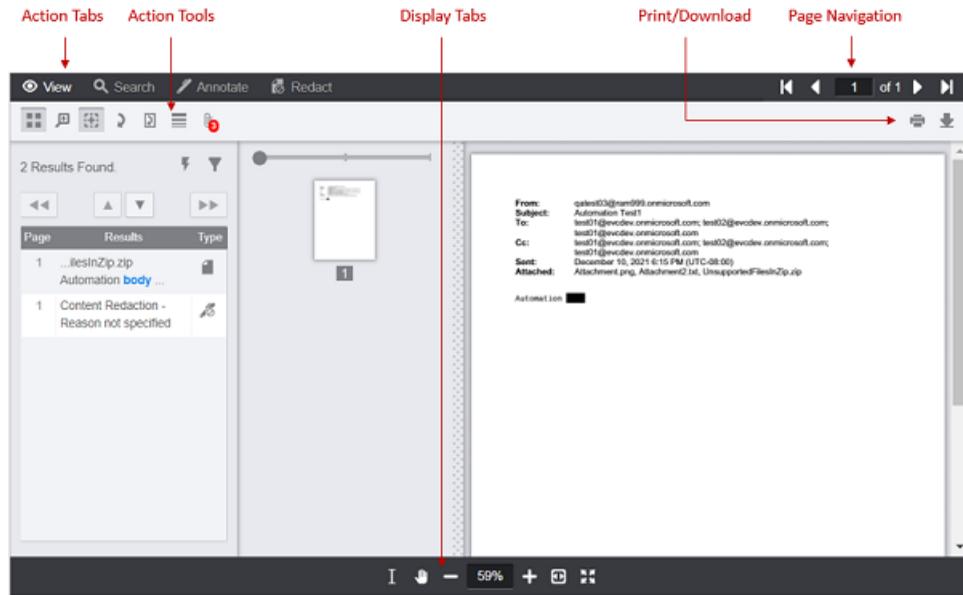
**Persistent Hit Highlighting** highlights search terms in email and file content within the native viewer, allowing reviewers to simultaneously view highlighted search terms from the most recently performed searches.

**Annotation and redaction functionalities** enable reviewers to annotate and redact documents in multiple colors, apply reason codes, and verify redactions prior to production quickly and easily. Reviewers can redact specific text, pages, or areas within a document. Reviewers can leverage reason codes to quickly perform checks and verify the accuracy of all redactions.

**Redaction verification** enables reviewers to rapidly navigate through each redaction within a document as part of the quality control process. Reviewers can simultaneously redact all the searched terms in the document.

## Understanding the native viewer interface

The native view provides various document viewing option as highlighted in the following image.



- **Action Tabs:** You can use these tabs to view, search, annotate, and redact the content.
- **Action Tools:** When you select any action tab, the corresponding action tools are available for you.
- **Display Tabs:** You can use various document display options, such as text selection, pan tool, zoom in and out, and full screen mode.
- **Print/Download:** You can use these tools to print and download the document.
- **Page Navigation:** You can use these options to navigate across the document pages.

## Annotating email and file content

You can add annotations to documents to further explain, analyze or illustrate a certain point, or encourage collaboration and communication among a reviewing team. The various editing tools are useful for calling reviewers attention to certain parts of the document. For example, you may want to give a reason for a particular markup to help speed the review or comply with organizational guidelines and regulatory mandates. Or perhaps you need to mark a document for later action such as Redaction.

Annotations are visible on produced documents. This means that emails and files can be annotated with any of the edit tools. After annotating, the item can be reviewed by another reviewer who can also add annotations.

You can consider using different colors and other formatting styles to differentiate reviewers.

### To annotate email and file content

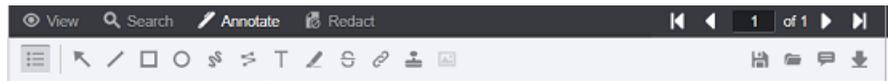
- 1 Select an email or a file, which you want to annotate, from your search result to view its content in the preview pane.
- 2 Click the **Native View** icon to view its content in a native viewer.
- 3 In the native viewer, to search a specific text or a phrase in the document, select the **Search** tab. In the search tool, enter the text or the phrase you want to search in the document, and click the **Search** icon.

---

**Note:** You can use the search tools such as Match exact word or phrase, Match case, Match whole word, Begins with, Ends with, Wildcard search, or Proximity search to make the search more precise.

---

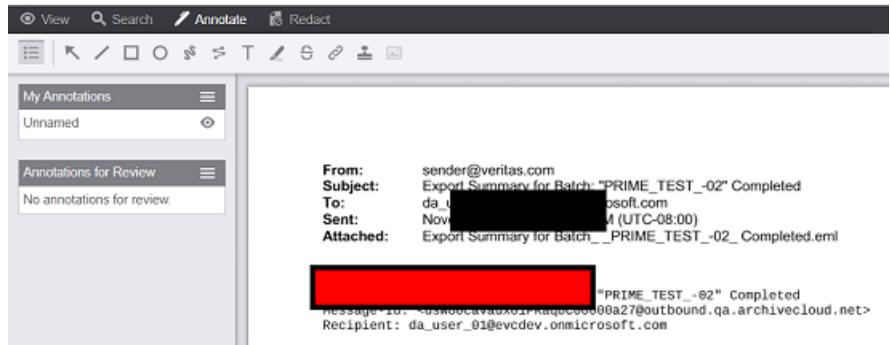
- 4 Select the text or area in the document and use the redaction tools as described below:



The following annotation tools are available:

- **Arrow:** Enables to draw an arrow. You can select color, opacity, and border width.
- **Line:** Enables to draw a line. You can select color, opacity, and border width.
- **Rectangle:** Enables to draw a rectangle. You can select fill color, opacity, border color, border width, and layer order.
- **Ellipse:** Enables to draw an ellipse. You can select fill color, opacity, border color, border width, and layer order.
- **Freehand:** Enables you to apply a freehand annotation. You can select color, opacity, and border width.
- **Polyline:** Enable to draw a custom polygon. You can select fill color, opacity, border width, and layer order.

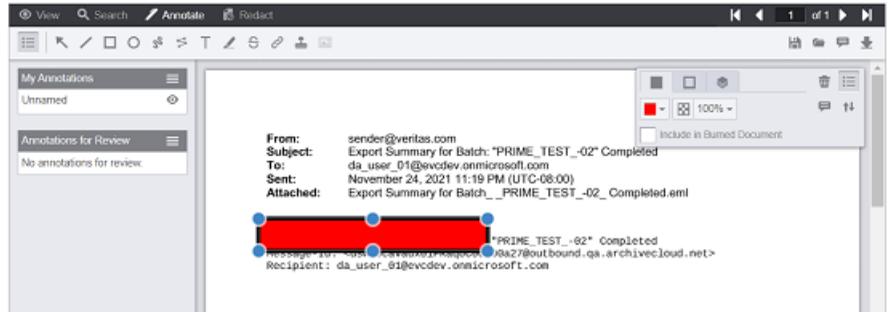
- **Text:** Enable to write text within an annotation. You can select fill color, opacity, border color, border width, layer order, and several font options.
  - **Highlight:** Enables to highlight the select text highlight annotation.
  - **Strikethrough:** Enables to mark text that is mistaken or to be remove. You can select color and border width.
  - **Text Hyperlink:** You can give a custom link to the selected text. To change the hyperlink, you can directly click on the text or make selection using the pan tool and change the link using the context menu.
  - **Stamp:** User can give stamp of Approved, Rejected or Reviewed using this annotation. As of now, user can only apply one of these thee stamp annotations. Any other customized text is not possible.
  - **Image Stamp:** You can apply any of the two pre-existing image stamps, cross or tick mark, on the document.
- 5 (Optional) Select the **Annotation Layers** icon to view the annotations layers in the left pane.



To create a layer, select the redacted text or area. Under **My Annotations**, click the **More Options** icon and do the following:

- Click **Edit Name** to name the selected redaction text or area.
  - Select one or more annotations that you want to edit from the drop-down and another reviewer's annotations. Click **Load Annotations** to add these annotations under the selected annotation layer.
  - Click **Save Annotations** to save the redaction text or area. A green notification bar displays that mentions the annotation and redaction are now saved in that layer.
- 6 Navigate to the text or area where you want to apply annotation
- 7 Select any of the annotation tools, and then draw the annotation.

- 8 Select the annotation to open the **Annotation Options** pane, and do the following as required. See the following sample image for annotation actions.



- Click the **Fill Color** icon to choose color of redacted area.
  - Click the **Border Color** icon to set border color and width.
  - Click the **Layer Order** icon to select the layer pattern.
  - Select the transparency percentage for the annotation color.
  - Select the **Include in burned document** check box to include this annotation when document is printed.
  - Click the **Delete** icon to delete the redaction of selected area.
  - Click the **Add Comment** icon to add a comment for selected area redaction.
  - Click the **Move Menu** icon to shift the **Annotation Options** pane to top or bottom of the native view pane.
- 9 On the Action Tools bar, do the following as required:
    - Click the **Save** icon to save the redacted text and areas.
    - Select multiple annotations and click the **Load Annotations** icon to create a set of annotations within a document.
    - Click the **Comments Panel** icon to view or hide the comments panel in the viewer.
  - 10 If required, click the **Download** icon, and specify what to include during download in the document.

See [“Downloading the annotated and redacted document”](#) on page 292.

# Redacting email and file content

In case of redacting emails in native view, attachments are linked to the original message (not the parent message with the attachment). The regular fields such as **TO** and **CC** are merged with the corresponding Journal fields.

You can redact these fields as well. In case of files, no such metadata is merged with the document. You can directly work on the document content.

## To redact email and file content

- 1 Select an email or a file, which you want to redact, from your search result to view its content in the preview pane.
- 2 Click the **Native View** icon to view its content in a native viewer.
- 3 In the native viewer, do the following:
  - To search a specific text or a phrase in the document, select the **Search** tab. In the search tool, enter the text or the phrase you want to search in the document, and click the **Search** icon.

---

**Note:** You can use the search tools such as Match exact word or phrase, Match case, Match whole word, Begins with, Ends with, Wildcard search, or Proximity search to make the search more precise. While using the proximity search, the searched terms in the results are highlighted in the Preview pane and Native views of the attachments. The exact number of words between the search keywords or the order of the keywords does not matter.

---

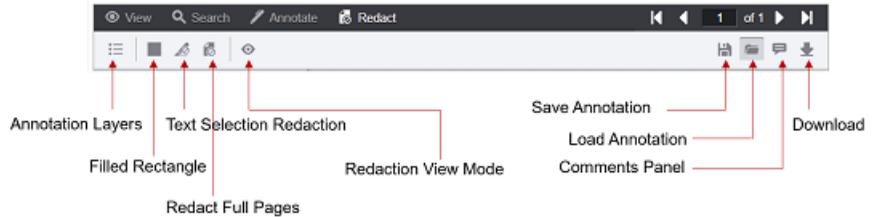
- To redact the area, select the **Redact** tab.

---

**Note:** You can use the redaction tools like rectangle selection, text selection, and full-page redaction to redact content.

---

- 4 Select the text or area in the document and use the redaction tools as described below:



### Annotation Layers

The **Annotation Layer** icon is located under both the **Annotate** and the **Redact** tabs.

The Annotation Layer functionality helps you to create, view and manage multiple sets of annotations within a document and improves collaboration during document reviewing. The name of the layer that a comment belongs to is displayed next to the date and time in the comment.

Before you save or load the annotations, ensure that your session is not expired. Else, you cannot save or load annotations if the session is expired.

### Filled Rectangle

(Redact Area)

Redact area option enables you to create a redaction on any part of the viewable document. You can draw redaction boxes over any part of a document.

Click the **Filled Rectangle** icon and then hold down your mouse and drag to select an area to redact. Type a reason in the pop-up window, if prompted to do so, and click **OK**. The reason is displayed in the redacted area.

When you hover over the redacted area, the details such as author name of the logged-in user and time of redaction are displayed. Redactions in different colors can be done for area redactions.

### Text Selection Redaction

(Redact Text)

Redact text option enables you to select text and apply redaction. Only black color is available for text redactions.

Select the text you want to redact, and click the **Text Selection Redaction** icon.

### Redact Full Pages

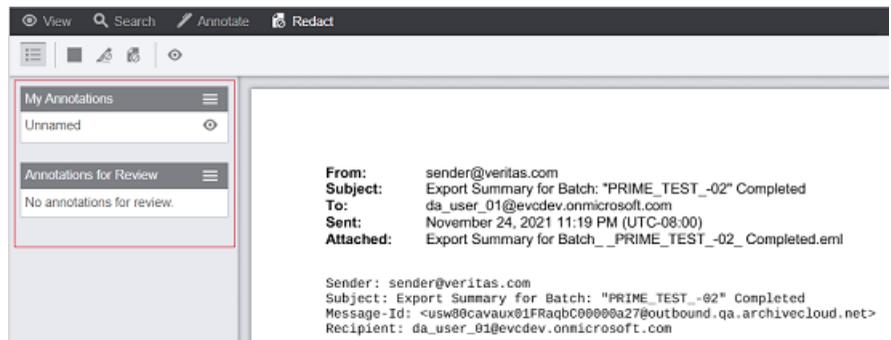
Redact page option enables you to redact the current page or a page range. Choose a redaction reason, and click **Redact**. In production, all pages print with black redaction fields.

**Redaction View Mode**

Redaction View mode allows to make redacted area translucent or opaque. By default, the redacted area or text will be displayed in translucent mode.

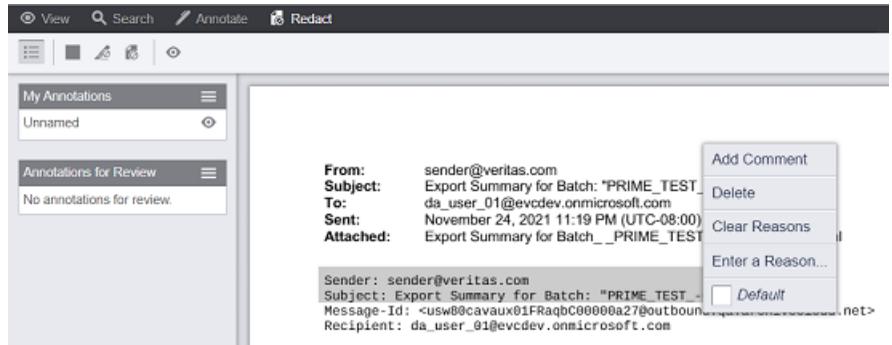
If you want the default redaction view mode to be opaque, please contact your case administrator. Click the **Redaction View Mode** icon to view or redact the text or area.

- 5 (Optional) Select the **Annotation Layers** icon to view the annotations layers in the left pane.



To create a layer, select the redacted text or area. Under **My Annotations**, click the **More Options** icon and do the following:

- Click **Edit Name** to name the selected redaction text or area.
  - Select one or more annotations that you want to edit from the drop-down and another reviewer's annotations. Click **Load Annotations** to add these annotations under the selected annotation layer.
  - Click **Save Annotations** to save the redaction text or area. A green notification bar displays that mentions the annotation and redaction are now saved in that layer.
- 6 Select the redacted text to open the **Annotation Options** pane, and do the following as required. See the following sample image for annotation actions.



- Click the **Add Comment** icon to add a comment for selected text redaction.
- Click the **Delete** icon to delete the redaction of selected text.
- Select **Clear Reasons** to remove the previously implemented redaction reasons.
- Select **Enter Reasons** to provide a new reason for redaction. Select the predefined reasons, if available.

---

**Note:** After associating reasons, if you hover over the redacted area, a tooltip appears. The tooltip convention is as below:

<username of the user who applied the redaction reasons> : <applied redaction reasons separated by comma>

For example, if the user name is abc@xyz.com, and the applied reasons are RR1 and RR2, then the tooltip will appear as **abc@xyz.com:RR1,RR2**

If multiple users apply redaction reasons to the same redacted area, then the tooltip displays all users in stack.

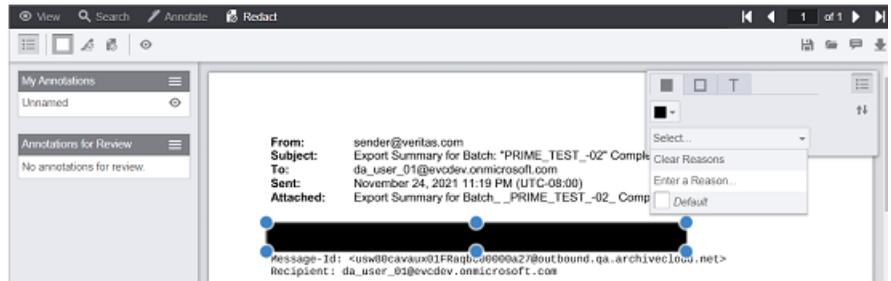
For example, another user pqr@xyz.com apply AB1 and AB2 redaction reasons to the above-mentioned redacted area, the tooltip appears as below:

**abc@xyz.com:RR1,RR2**

**pqr@xyz.com:AB1,AB2**

---

- 7 Select the redacted area to open the **Annotation Options** pane, and do the following as required:



- Click the **Fill Color** icon to choose color of redacted area.
  - In the drop-down list:
    - Select **Clear Reasons** to remove the previously implemented redaction reasons.
    - Select **Enter Reasons** to provide a new reason for redaction.
    - Select the predefined reasons, if available.
  - Click the **Delete** icon to delete the redaction of selected area.
  - Click the **Add Comment** icon to add a comment for selected area redaction.
  - Click the **Move Menu** icon to shift the **Annotation Options** pane to top or bottom of the native view pane.
- 8 On the Action Tools bar, do the following as required:
- Click the **Save** icon to save the redacted text and areas.
  - Select multiple annotations and click the **Load Annotations** icon to create a set of annotations within a document.
  - Click the **Comments Panel** icon to view or hide the comments panel in the viewer.
- 9 If required, click the **Download** icon, and specify what to include during download in the document.

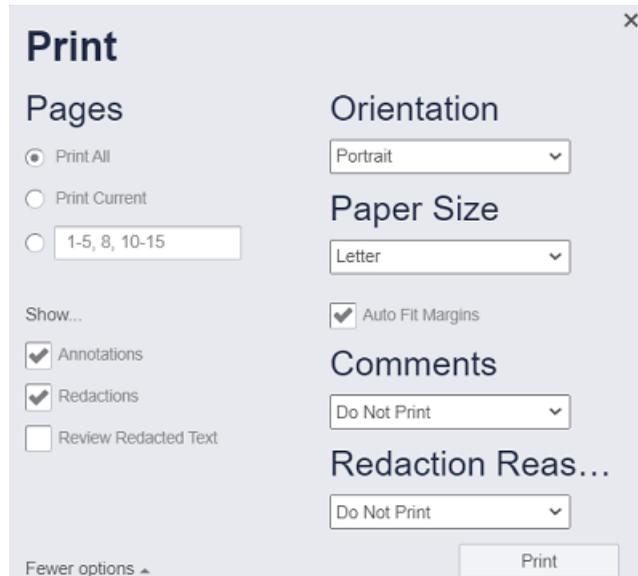
See [“Downloading the annotated and redacted document”](#) on page 292.

## Printing the annotated and redacted document

After annotation or redaction, you can print the document with these redacted areas burned into the printed image thereby permanently hiding privileged or confidential information.

**To print the annotated and redacted document**

- 1 After you annotate or redact the content or document, select the **View** tab.
- 2 Click **Print**. The application displays the following dialog box.



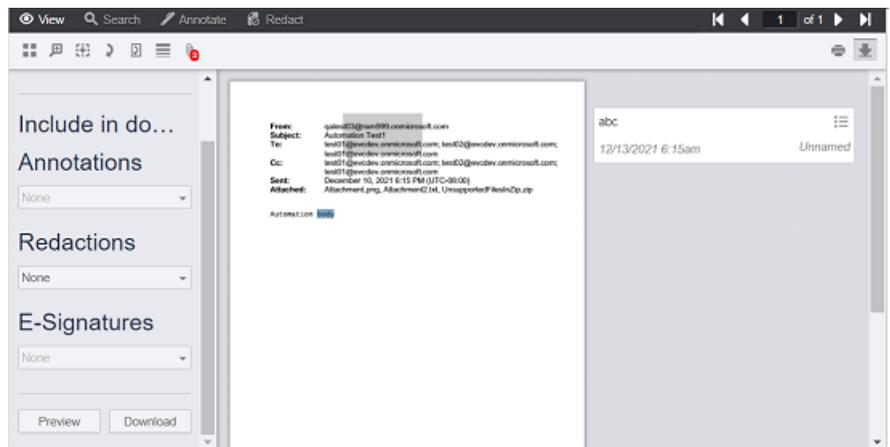
- 3 Under **Pages**, select the options for the pages you want to print. Select the Annotation, Redaction, Review Redacted Text check-boxes if you want to print the document with all annotations, redactions, and review text.
- 4 Under **Orientation**, select the required page orientation.
- 5 Under **Paper Size**, select the paper size for the printed document.
- 6 Under **Comments**, do the following:
  - Select **Do Not Print** to exclude printing of comments.
  - Select **After Each Page** to print comments after each page.
  - Select **At End of Document** to print all comments at the end of the printed document.
- 7 Under **Redaction Reasons**, do the following:
  - Select **Do Not Print** to exclude printing of redaction reasons.
  - Select **After Each Page** to print redaction reasons after each page.
  - Select **At End of Document** to print all redaction reasons at the end of the printed document.

# Downloading the annotated and redacted document

After annotation or redaction, you can download document in either original format (native) or PDF format. You can choose to include or exclude annotations and redaction while downloading PDF.

## To download the annotated and redacted document

- 1 After you annotate or redact the content or document, select the **View** tab.
- 2 Click **Download**. The application displays the following dialog box.



- 3 Under **Annotation**, select **None** to exclude annotation downloads or select **All** to include all annotations while document downloading.
- 4 Under **Redaction**, select **None** to exclude redaction downloads or select **All** to include all redactions while document downloading.
- 5 To preview the document before downloading it, click **Preview**. After preview, you can end preview by clicking the **End Preview** button.
- 6 Click **Download** to save the document on your computer.

# Managing exports

This chapter includes the following topics:

- [About exports](#)
- [Performing exports in Investigation and eDiscovery](#)
- [Viewing export details of native documents](#)
- [Viewing export details of production sets](#)
- [Resubmitting failed export items](#)
- [Option to maintain folder structure in the export](#)
- [Canceling Export Batch](#)
- [Email export FAQ](#)

## About exports

During investigation or a case review process, any user who has access to searches can do the following:

- Export the printable summary reports of a search for emails, collaboration messages, and files.
- Export actual emails, collaboration messages, and files.

---

**Note:** It is important to understand the difference between exporting summary reports and exporting item records. When you export summary reports, the metadata displayed on the details pane is shown in the excel file. However, when you export items, the actual item files are downloaded.

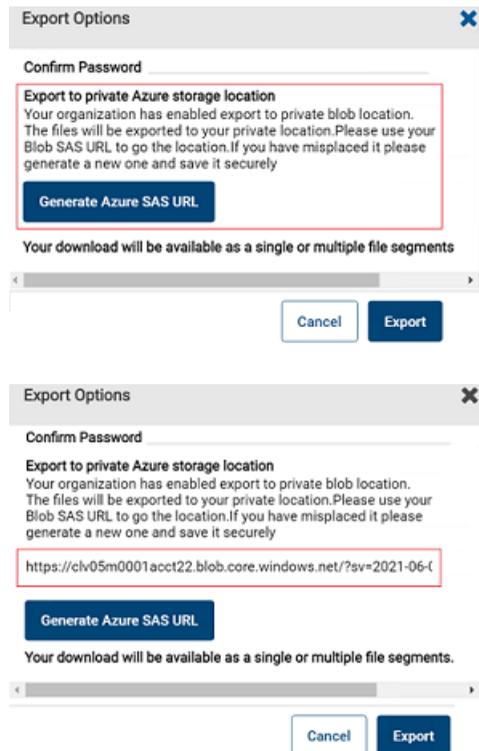
---

- Export items to the private Azure Blob storage location.

---

**Note:** Users can see this button only if the **Export to Azure private storage location** feature in the Veritas Alta View Compliance and Governance Management Console is enabled for them.

While exporting items, in the **Export Options** dialog box, users can click **Generate Azure SAS URL** to get the Azure Blob SAS URL to access the location and save it for future use.



For security reasons, the application does not show this URL the next time. However, if the SAS URL is misplaced for any reason, click **Generate Azure SAS URL** again to generate a new SAS URL and save it securely.

After you click **Export** in the **Export Options** dialog box, all the selected items are exported to the Azure private storage location. You can use Microsoft Storage Explorer to access the exported items.

---

# Performing exports in Investigation and eDiscovery

This section provides export-specific links to different sections. You can easily navigate to the export-specific sections of your interest.

- **Investigation**
  - Exporting items from searches
    - Batch export - Emails: See [“Exporting searched emails”](#) on page 84.
    - Summary report - Emails: See [“Exporting a search summary report for emails”](#) on page 90.
    - Batch export - Collaboration messages: See [“Exporting collaboration messages”](#) on page 104.
    - Summary report - Collaboration messages: See [“Exporting a search summary report for collaboration messages”](#) on page 110.
    - Batch export - Files: See [“Exporting searched files”](#) on page 120.
    - Summary report - Files: See [“Exporting a search summary report for files”](#) on page 125.
    - Summary report export: See [“Exporting a summary report of searched items”](#) on page 78.
  - Exporting items from Advance ECA searches
    - Batch export - Emails: See [“Exporting emails from Advanced ECA search”](#) on page 151.
    - Summary report export - Emails: See [“Exporting a search summary report for emails”](#) on page 164.
    - Batch export - Collaboration messages: See [“Exporting collaboration messages from Advanced ECA search”](#) on page 155.
    - Summary report export - Collaboration messages: See [“Exporting summary report for collaboration messages”](#) on page 166.
    - Batch export - Files: See [“Exporting files from Advanced ECA search”](#) on page 159.
    - Summary report export - Files: See [“Exporting summary report for files”](#) on page 168.
- **eDiscovery**
  - Batch export - Emails from cases: See [“Exporting emails”](#) on page 215.

- Summary report - Emails from cases: See [“Exporting a search summary report for emails”](#) on page 220.
- Batch export - Collaboration messages from cases: See [“Exporting collaboration messages”](#) on page 236.
- Summary report - Collaboration messages from cases: See [“Exporting a search summary report for collaboration messages”](#) on page 241.
- Batch export - Files from cases: See [“Exporting files”](#) on page 250.
- Summary report - Files from cases: See [“Exporting a search summary report for files”](#) on page 255.

## Viewing export details of native documents

The **Export** node lets you view the export-specific details of the native documents. The **Native** page provides a list of export batches. Alta eDiscovery splits large exports into 2-gigabyte batches. Therefore, multiple export batches can be associated with one export. You can expand the rows to view the export details and export download link. The details include information such as export file type, download size of the file, export start and completion dates, expiration date for download link, output file type, export status, and so on.

The page displays the **Resubmit Failed Items** section only when the selected export batch contains failed export items. Exports contain failed items when the *Completed with Errors* or *Error* is listed in the Step field.

### To review export status of the native documents

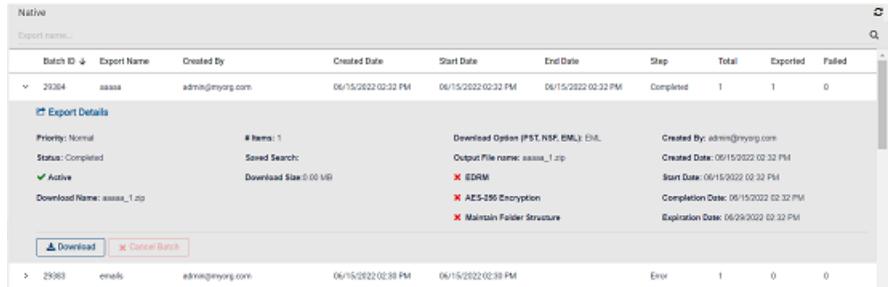
- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Search for and select the case.  
The selected **Case\_Name** node appears below **Cases**.
- 3 From the displayed case nodes, select **Exports > Native**.  
The application displays a list of the native exports.
- 4 If required, click the **Refresh** icon in the top-right corner of the **Native** page to get the latest available records.

Batch ID	Export Name	Created By	Created Date	Start Date	End Date	Step	Total	Exported	Failed
> 25384	excel	admin@myorg.com	06/15/2022 02:32 PM	06/15/2022 02:32 PM	06/15/2022 02:32 PM	Completed	1	1	0
> 25383	emails	admin@myorg.com	06/15/2022 02:30 PM	06/15/2022 02:30 PM		Error	1	0	0
> 26006	emails	admin@myorg.com	03/03/2022 06:21 PM	03/03/2022 06:21 PM	03/03/2022 06:21 PM	Completed	1	1	0
> 26008	emails	admin@myorg.com	02/28/2022 18:14 PM	02/28/2022 18:14 PM	02/28/2022 18:14 PM	Stalled	9386	2	0
> 26008	emails	admin@myorg.com	02/28/2022 18:14 PM	02/28/2022 18:14 PM	02/28/2022 18:21 PM	Completed	389	389	0
> 26008	emails	admin@myorg.com	02/28/2022 18:14 PM	02/28/2022 18:14 PM	02/28/2022 18:21 PM	Completed	394	394	0

- Batch ID** ID number for the export batch.
- Export Name** Name of the export file.
- Created By** Name of the user who has created the export.
- Created Date** Date and time export was created.
- Start Date** Date and time export started processing.
- End Date** Date and time export process ended.
- Step** Describes the export status:
  - **Complete** - export without any errors
  - **Completed with Errors** - export with failed export items
  - **Error** - export failed
  - **Terminated** - export canceled
- # Total** Total number of export items.
- # Exported** Number of successful export items.
- # Failed** Number of failed export items.

- 5 Search for and select the export record. Alternatively, click the arrow icon to expand and view details on native email exports

The application expands the row to display the export details such as priority, export status, output file name, and file size, export created by and on which date, start and completion date of export, expiry date to download the file, and so on.



- 6 To download the export summary report, click **Download**.

The downloaded zip file is password protected. Enter the appropriate password to view the report.

## Viewing export details of production sets

The **Export** node lets you view the export-specific details of the production sets.

### To view export details of the production set

- 1 On the **eDiscovery** tab, click **Cases**.
- 2 Search for and select the case in which you want to configure a production set metadata before exporting it.

The selected **Case\_Name** node appears below **Cases**.

- 3 From the displayed case nodes, select **Exports > Production Sets**.

The application displays a list of the production set export batches.

- 4 If required, click the **Refresh** icon in the top-right corner of the **Production Sets** page to get the latest available records.

Batch ID	Export Name	Created By	Created Date	Start Date	End Date	Step	Total	Expired	Failed
> 254	a	admin@myorg.com	06/20/2022 11:09 AM	06/20/2022 11:09 AM	06/20/2022 11:09 AM	Completed	1	1	0
> 245	1	admin@myorg.com	06/13/2022 08:53 PM	06/10/2022 07:06 AM	06/18/2022 07:59 AM	Completed	1	1	0
> 242	ABC	admin@myorg.com	06/13/2022 07:28 PM			Terminated	6	0	0
> 82	a	admin@myorg.com	06/13/2022 12:47 PM	06/10/2022 12:47 PM	06/13/2022 12:47 PM	Completed	1	1	0
> 56	SSS	admin@myorg.com	06/16/2022 09:42 PM	06/10/2022 09:42 PM	06/18/2022 09:42 PM	Completed	3	3	0
> 55	sq	admin@myorg.com	06/16/2022 09:33 PM	06/10/2022 09:33 PM	06/18/2022 09:34 PM	Completed	1	1	0
> 54	asa	admin@myorg.com	06/16/2022 09:30 PM	06/10/2022 09:30 PM	06/18/2022 09:30 PM	Completed	3	3	0

- Batch ID** ID number for the export batch.
- Export Name** Name of the export file.
- Created By** Name of the user who has created the export.
- Created Date** Date and time export was created.
- Start Date** Date and time export started processing.
- End Date** Date and time export process ended.
- Step** Describes the export status:
  - **Complete** - export without any errors
  - **Completed with Errors** - export with failed export items
  - **Error** - export failed
  - **Terminated** - export canceled
- # Total** Total number of export items.
- # Expired** Number of successful export items.
- # Failed** Number of failed export items.

- 5 Search for and select the export record. Alternatively, click the arrow icon to expand and view details of selected production set exports.

The application expands the row to display the export details such as production set name, number of items, priority, export status, saved search name, download size, output file name, and file size, export created by and on which date, start and completion date of export, expiry date to download the file, bates number range (start and end bates number), and so on.

The screenshot displays the 'Production Set' interface. At the top, there is a search bar for 'Export name...'. Below it is a table with the following columns: Batch ID, Export Name, Created By, Created Date, Start Date, End Date, Step, Total, Exported, and Failed. A single row is visible with the following data: Batch ID 247, Export Name ps007\_1, Created By admin@myorg.com, Created Date 09/06/2022 11:41 AM, Start Date 09/06/2022 11:41 AM, Step Exporting, Total 1, Exported 0, Failed 0. Below the table is an 'Export Details' section. It contains the following information: Production Set Name: ps007, # Items: 1, Created By: admin@myorg.com, Priority: Normal, Saved Search: ps007, Created Date: 09/06/2022 11:41 AM, Status: Completed, Download Size: 0.07 MB, Start Date: 09/06/2022 11:41 AM, Active (with a green checkmark), Output File name: ps007\_1\_1.zip, Completion Date: 09/06/2022 11:41 AM, Bates Number Start: Pre001suff, Bates Number End: Pre002suff, Expiration Date: 09/09/2022 11:42 AM. At the bottom of the details section are two buttons: 'Download' and 'Cancel Batch'.

- 6 To download the export data, click **Download**.

The downloaded zip file is password protected. Enter the appropriate password to view the report.

## Resubmitting failed export items

Exports contain failed items when **Completed with Errors** or **Error** is listed in the **Step** field.

Exports with failed items can be resubmitted three times.

---

**Note:** Exports can only be resubmitted after all associated export batches have finished processing. Alta eDiscovery splits large exports into 2-gigabyte batches. Therefore, multiple export batches can be associated with one export.

---

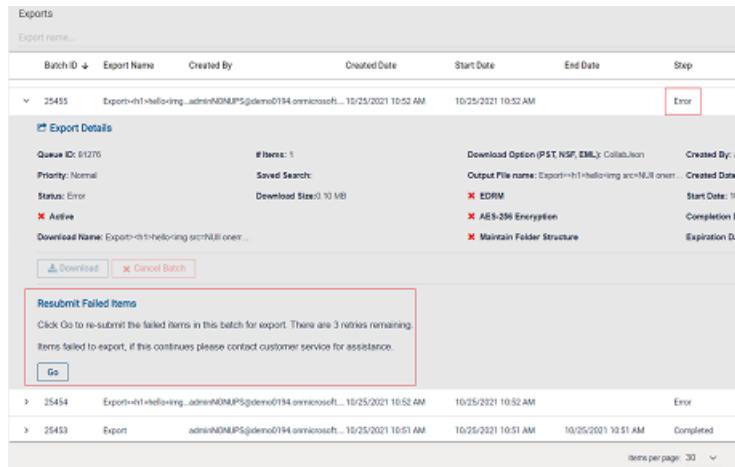
For more information on failed items, see the error list in the download file.

### To resubmit failed export items:

- 1 On the **Investigation** tab, in the left navigation pane, select **Exports**.  
Or, on the **eDiscovery** tab, select the case, and then in the left navigation pane, select **Exports**.
- 2 Select the failed export batch you want to resubmit.

- In the **Resubmit Failed Items** section, click **Go**.

**Note:** The **Resubmit Failed Items** section appears only when the selected batch contains failed export items. The batch contains failed items when **Completed with Errors** or **Error** is listed in the **Step** field.



- Complete the information in the **Resubmit Fail Items** window. Review the following table for more information.

<b>Export Name</b>	Enter a name for the export file. <b>Note:</b> The minimum length is 5 characters and the maximum is 160.
<b>Export Password</b>	Enter an access password for the export file. The password is required to open the export file after it is downloaded to your computer.
<b>Confirm Password</b>	Enter your export password again to confirm.

- Click **Export Items**.

**Note:** Only failed items are included in the resubmitted exports. For example, if an export with 20 items includes 5 failed items, only the 5 failed items are exported to the file.

## Option to maintain folder structure in the export

The option to Include Folder structure in the export is displayed to the Customer only when all the listed conditions are satisfied:

- Customer has purchased Folder Synchronization
- Customer exports a single custodian's email
- Customer is on the E Discovery Tab

The **Include Folder Structure** check box is displayed and disabled by default. The check box is enabled for selection only when the user selects the value **PST** from the **Message Format** drop-down.

The screenshot shows the 'Export Options' dialog box with the following settings:

- Message Format:** Clearwell
- Include Journaling Envelope:**
- Enable AES-256 Encryption:**
- Exclude Exported Emails:**
- Export Name:** tool17
- Export Password:** (empty field)
- Confirm Password:** (empty field)
- Include Folder Structure Emails:**  (disabled)

Your download will be available as a single or multiple file segments.

Buttons: Cancel, Export

## Canceling Export Batch

When you cancel an export batch, the export is abandoned, and the status of the batch is set to **Terminated**. The option to resubmit failed items is disabled on the terminated batch.

## To cancel an export batch

- 1 On the **Investigation** tab, in the left navigation pane, click **Exports**.  
 The batch export records appears.

Batch ID	Export Name	Created By	Created Date	Start Date	End Date	Step	Total	Exported	Failed
> 27952	files	admin@CNMPPS@demo0104.altiris.com	11/11/2021 4:28 AM	11/11/2021 4:28 AM	11/11/2021 4:28 AM	Completed	40	40	0
> 27983	messages	admin@CNMPPS@demo0104.altiris.com	11/11/2021 2:14 AM	11/11/2021 2:14 AM	11/11/2021 2:14 AM	Terminated	723	209	0
> 27981	files	admin@CNMPPS@demo0104.altiris.com	11/11/2021 2:08 AM	11/11/2021 2:08 AM	11/11/2021 2:08 AM	Terminated	40	40	0
> 27960	filesA83	admin@CNMPPS@demo0104.altiris.com	11/11/2021 1:17 AM	11/11/2021 1:17 AM	11/11/2021 1:16 AM	Completed	40	40	0
> 27959	filesA82	admin@CNMPPS@demo0104.altiris.com	11/11/2021 1:15 AM	11/11/2021 1:15 AM	11/11/2021 1:16 AM	Completed	40	40	0
> 27962	files	admin@CNMPPS@demo0104.altiris.com	10/28/2021 1:59 AM	10/28/2021 1:59 AM	10/28/2021 1:58 AM	Completed	2	2	0
> 27962	files	admin@CNMPPS@demo0104.altiris.com	10/28/2021 1:58 AM	10/28/2021 1:58 AM	10/28/2021 1:58 AM	Completed	2	2	0
> 28485	Export=01-helloing sr_	admin@CNMPPS@demo0104.altiris.com	10/25/2021 2:52 AM	10/25/2021 2:52 AM	10/25/2021 2:52 AM	Error	1	0	0
> 28484	Export=01-helloing sr_	admin@CNMPPS@demo0104.altiris.com	10/25/2021 2:52 AM	10/25/2021 2:52 AM	10/25/2021 2:52 AM	Error	1	0	0

- 2 Search for and select an export batch in the table of exports.
- 3 Click the corresponding arrow icon adjacent to the **Batch ID** column to expand and view the export batch details.

Batch ID	Export Name	Created By	Created Date	Start Date	End Date	Step	Total	Exported	Failed
> 27952	files	admin@CNMPPS@demo0104.altiris.com	11/11/2021 4:28 AM	11/11/2021 4:28 AM	11/11/2021 4:28 AM	Completed	40	40	0
<b>Export Details</b> Queue ID: 0385 # Items: 40 Download Option (PST, MRF, EML): Collection Created By: admin@CNMPPS@demo0104.altiris.com Priority: Normal Saved Search: Output File name: Res_1.zip Created Date: 11/11/2021 4:28 AM Status: Completed Download Size: 12.85 MB EDRM Start Date: 11/11/2021 4:28 AM Active AES-256 Encryption Completion Date: 11/11/2021 4:28 AM Download Name: Res_1.zip Maintain Folder Structure Expire Date: 11/26/2021 4:28 AM [Download] [Cancel Batch]									
> 27983	messages	admin@CNMPPS@demo0104.altiris.com	11/11/2021 2:14 AM	11/11/2021 2:14 AM	11/11/2021 2:14 AM	Terminated	723	209	0
> 27981	files	admin@CNMPPS@demo0104.altiris.com	11/11/2021 2:08 AM	11/11/2021 2:08 AM	11/11/2021 2:08 AM	Terminated	40	40	0
> 27960	filesA83	admin@CNMPPS@demo0104.altiris.com	11/11/2021 1:17 AM	11/11/2021 1:17 AM	11/11/2021 1:16 AM	Completed	40	40	0

- 4 To download a zip file of the export batch, click **Download**.
- 5 To cancel the export, click **Cancel Batch** before the export is completed.

# Email export FAQ

The following frequently asked questions provide more information about data exports in Alta eDiscovery.

- What is the maximum number of messages that I can export?  
 You can export up to 200,000 messages.
- Why is the export to NSF option unavailable?

The NSF export option is only available when a Domino server has been configured as the mail server type in the archive settings. Contact your Archive Administrator for more information.

# Collaborative reports

This chapter includes the following topics:

- [About collaborative eDiscovery reporting](#)
- [Report by email: Audit trail](#)
- [Report by Case: Case History](#)
- [Report by Case: Case Summary](#)
- [Report by Archive: eDiscovery dashboard](#)

## About collaborative eDiscovery reporting

The eDiscovery Administrators and reviewers with the appropriate permissions can review the reports that contain case-related actions. They can review reports by email, by case, or by archive.

Collaborative eDiscovery reports contain the following information:

- Created Case
- Created Search
- Search criteria used
- The number of emails that are assigned to a specific reviewer

## Report by email: Audit trail

Reviewers can review the audit trail for a specific email that includes actions performed, such as review status tags or the applied labels and export details.

**To review the audit trail for an email**

- 1 Expand the node for a case.
- 2 Expand the **Review Status Tags** node.
- 3 Select **All** to display all emails or one of the review status tags under the **Review Status Tags** node.
- 4 Select the email you want to audit.
- 5 Click **Audit**.
- 6 Review the information in the **Email History** window that displays.

## Report by Case: Case History

Reviewers can see and search all actions which are performed within a case such as edits on case details, reviewer permission changes, or created exports.

---

**Note:** Only the eDiscovery Administrators or reviewers with the **View Case Logs/Reports** permission can view reports for a case.

---

**To review the history for a case**

- 1 Expand the node for a case.
- 2 Select **Case History** from the node for the case you selected. The **Case History** pane displays.
- 3 Click the arrow to display the Case History search menu.

- 4 Use the filters that are provided to search for specific Case History items. Review the following table for more information.

<b>Scope</b>	Select the general scope of the Case History item.
<b>Action</b>	Select the specific action of the Case History item.
<b>User</b>	Select the user that performed the action.
<b>Date From</b>	Enter the start date for the search range.
<b>Date To</b>	Enter the end date for the search range.
<b>Before Value</b>	Enter the before state of an item. You can enter the original review status tag for an email.
<b>After Value</b>	Enter the after state of an item. You can enter the final review status tag for an email.

- 5 Click **Search**.
- 6 Click **Export Report** to export the report for review at a later time.
- 7 Review the information in the **Email History** window that displays.

## Report by Case: Case Summary

The eDiscovery Administrators and reviewers can view a report for individual cases, which includes the number of reviewers, custodians, emails, and legal holds. The case expiration date is also displayed.

### To review the summary for a case

- 1 Expand the node for a case.
- 2 Select **Summary** from the node for the case you selected.
- 3 Review the Case Summary report that displays.
- 4 Click **Export Report** to export the report for review at a later time.

## Report by Archive: eDiscovery dashboard

The eDiscovery Administrators can view a report for the entire archive. This report includes the number of emails within each case and the number of cases that are assigned to a reviewer.

**To review the summary for the archive**

- 1** On the **eDiscovery** tab, click **Dashboard** node.
- 2** Review the information.
- 3** If required, click **Export Report** to export the report for review whenever required.

# Alta eDiscovery alerts

This chapter includes the following topics:

- [Creating an alert](#)

## Creating an alert

Administrators and reviewers can create an alert that sends an email notification each time a user sends or receives an email that meets flagged criteria. For example, Administrators and Reviewers can create alerts to flag emails with profanity in the subject line, message body, or attachment.

### To create an alert

- 1 Create a saved search that defines the criteria for the alert.
- 2 Select the **Alerts** option on the Profile icon in the top-right corner of the application page.
- 3 Click the plus icon to display the **Add Policy Alert** page.
- 4 Enter the information for the alert in the **Add Policy Alert** window.

Refer to the following table for more information:

<b>Policy Name</b>	Enter a name for the new alert.
<b>Saved Search</b>	Click the down arrow and select the required saved search.
<b>Alert Email(s)</b>	Enter your email address.
<b>Comment</b>	Enter comments relating to the alert.
<b>In Dashboard</b>	Select the check box if you want the alert to appear in the <b>Administration dashboard</b> .

# Email Continuity

This chapter includes the following topics:

- [Managing Email Continuity](#)
- [Viewing Continuity emails](#)

## Managing Email Continuity

The **Continuity** tab is available to your organization if it subscribes to the Email Continuity feature.

If your account has the required permissions, you can access the **Continuity Management** page to do the following:

- Control whether users can send, reply to, and forward emails from Alta Personal Archive when your mail server is unavailable.
- Control whether users receive a notification when your organization's mail server is unavailable and Email Continuity is active.
- View the list of domains and mail servers that are configured for Email Continuity, and the Email Continuity status in each case.

### To manage Email Continuity

- 1 Select the **Continuity** tab.
- 2 Select the **Continuity Management** node.

- 3 Review or configure the Email Continuity settings as required. The configurable settings are as follows:

<b>Enable Send, Reply and Forward</b>	Select to allow users to send, reply, and forward emails from Alta Personal Archive when your organization's mail server is unavailable.
<b>Indicate EC Active</b>	Select to notify users when your organization's mail server is unavailable and Email Continuity is active.

The table below the settings lists each domain and corresponding mail server that are configured for Email Continuity, and the Email Continuity status in each case.

- 4 Click **Save** to save any changes you made.

## Viewing Continuity emails

From the **Continuity Emails** page of the **Continuity** tab, administrators can view a list of the emails that Email Continuity has handled during an outage.

### To view continuity emails

- 1 Select the **Continuity** tab.
- 2 Select the **Continuity Emails** node.

# Methods for searching cases and accounts

This chapter includes the following topics:

- [Performing Advanced Search and Query Search](#)
- [Search syntax for Advanced Search](#)
- [About stop words and special characters](#)
- [Phrase searches](#)
- [Boolean operator searches](#)
- [Wildcard searches](#)
- [Proximity searches](#)
- [Double-byte character set searches](#)
- [About enhanced searches in Japanese](#)
- [Searchable attachment types](#)
- [Search examples and tips](#)

## Performing Advanced Search and Query Search

Alta eDiscovery provides the **Advanced Search** and the **Query Search** features to search the content within archived accounts and cases. Both the search features are available in the **Investigations** tab (where you can search your own account or the accounts that you manage) and the **eDiscovery** tab (where you perform searches of the custodian accounts within cases).

Advanced Search support the use of phrase search, Boolean operators, proximity search, and wildcard search. See “[Search syntax for Advanced Search](#)” on page 318.

## Performing an advanced search

### To perform an advanced search

1 Access the **Advanced Search** tab from the **Investigation** or the **eDiscovery** tab.

2 Specify the following inputs:

#### Custodians

- Select **All** to search archives of all of the custodians that are associated with the case.
- Select **Custom** to search archives of the particular custodians. The **Manage** button appears. Click **Manage** to open the **Add/Remove Custodians**.  
Expand **Selected Custodians** to view the custodians selected for this search.  
Expand **Manage Custodians** and select the custodians required for this search.  
Click **Update** to add these selected custodians as a search input. These custodians are listed under the **Selected Custodians** section.

#### Custom Headers

**Note:** The **Custom Headers** option does not appear if there is no entry for a custom header for a particular group or tenant in database. Custom header does not work independently. You need to use the filter criteria to search the required items.

Expand **Custom Headers** and set the header operator values.

- Click + to add new search clauses.
- Click - to remove search clauses that are not required.
- In the first column, select the required header you want to search for. Based on the data type you have selected, the operator changes. For example, if you have selected the receiver date in header, the operator values can be *Between*, *Before inclusive* and *After inclusive*. For a numeric or integer header value, the operator values can be *Is equal to*, *Less than*, and *Greater than*. If you have selected a string value in header, then the operator will be *Contains*.
- In the second column, select the available operator.
- In the third column, specify the text, phrase, or date that you want to search for.

- Filters** Expand **Filters** and set the filter operator values. The operators are explained in a table below.
- Select **All** to match all conditions you have provided.
  - Select **Any** to match any of the conditions you have provided.
  - Click **+** to add new search clauses, and complete a new row for each clause.
  - Click **-** to remove search clauses that are not required.
  - Searches are not case-sensitive. The search supports phrase search, Boolean operators, proximity search, and wildcard search. See [“Search syntax for Advanced Search”](#) on page 318.

The **Filter** operators are listed below:

<b>Message</b>	Entire Message	Contains / Doesn't Contain
	Subject + Body	Contains / Doesn't Contain
	Subject	Contains / Doesn't Contain
	Body	Contains / Doesn't Contain
	Inbound Message (AND)	Yes / No
	Outbound Message (AND)	Yes / No
	Is Hidden	Yes / No
	IP Header	Contains / Doesn't Contain
	<b>Date Sent/Modified(AND)</b>	Is Equal To
Before		Select a date
After		Select a date
Within Range		Select a date range
<b>Participants</b>	All Senders and Recipients	Contains / Doesn't Contain
	Senders Only	Contains / Doesn't Contain
	Recipients Only	Contains / Doesn't Contain
	To/Cc	Contains / Doesn't Contain
	To	Contains / Doesn't Contain
	Bcc	Contains / Doesn't Contain

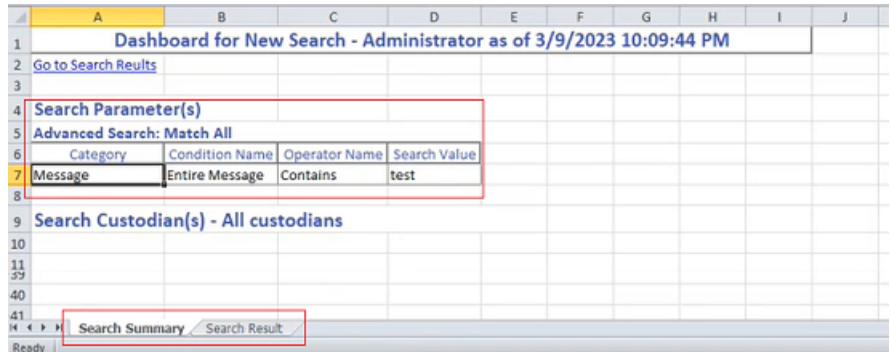
<b>Classification</b>	Classified As	Contains / Doesn't Contain  <b>Note:</b> This option is available if the Veritas Alta Classification service is enabled for your company.  Select a classification tag from the drop-down list. The list shows all the classification tags that have been applied to your company's messages in Veritas Alta Archiving.  To see a tooltip with a classification tag's description, select the classification tag from the drop-down list and then point to the classification tag.
	Sentiment Score	Is Equal To / Below (Inc.) / Above (Inc.)
<b>Attachment</b>	Has Attachment	Yes / No
	File/Attachment Name	Contains / Doesn't Contain
	File Attachment Type	Contains / Doesn't Contain  See <a href="#">"Searchable attachment types"</a> on page 326.

### 3 Click **Search**.

You can perform a new search and optionally save it, or you can view the results of a previously saved search.

#### **Important!**

- In Advanced Search, the search text input functionality is updated. In previous releases, when users were providing multiple text input with space, the default logical operator "AND" was getting applied. From now onwards, the default logical operator "OR" is getting applied to get user records.  
 This operator change from "AND" to "OR" is applied to all kind of searches. If users have previously used spaces while providing the search text inputs, their saved records (saved searches/standard searches/Ongoing searches) will be impacted as the operator is changed from "AND" to "OR".
- Based on the selected attributes, when you export the search report, the **Search Summary** and **Search Report** is generated as shown in the sample image below.



## Performing a query search

### To perform query search

- 1 Access the **Query Search** tab from the **Investigation** or the **eDiscovery** tab.
- 2 Specify the following inputs:

#### **Custodians**

- Select **All** to search archives of all of the custodians that are associated with the case.
- Select **Custom** to search archives of the particular custodians. The **Manage** button appears. Click **Manage** to open the **Add/Remove Custodians**. Expand **Selected Custodians** to view the custodians selected for this search. Expand **Manage Custodians** and select the custodians required for this search. Click **Update** to add these selected custodians as a search input. These custodians are listed under the **Selected Custodians** section.

**Query Search**

Specify the query.

While specifying the query, you must mention the search criterion before the query text. Use a colon (:) between the search criterion and the query text.

The sample query looks like:

**<search term/criterion>:<samplequerytext>**

For example,

**Entiremessage:samplequerytext1**

To perform a query search for multiple query text at a time, either use no field (same as \_All) or use the AND/OR operators to separate the query terms (keywords).

For example,

**\_ALL:(samplequerytext1) OR \_ALL:(samplequerytext2)**

**\_ALL:(test) AND \_ALL:(test2)**

You can also use the NOT operator before the search criterion.

For example,

**NOT \_ALL:(samplequerytext1) OR NOT \_ALL:(samplequerytext2)**

For more search terms, See [“Search examples and tips”](#) on page 330.

**Note:** Refer to the table below, which explains the essential conditions for specifying queries.

**Guidelines for specifying queries**

The application supports query searches only if the following necessary conditions are followed. Else, the application displays corresponding errors.

**Conditions**

**Examples**

**Operator-specific conditions**

The search criteria must be used after the operator and before the query text.

**Correct**

subject:hi OR attachments:test

**Incorrect**

subject:hi OR test

<b>Conditions</b>	<b>Examples</b>
<p>The AND/OR/NOT operators must be written in capital letters.</p>	<p><b>Correct</b>                      subject:text1 AND textbody:text2 OR attflag:true</p> <p><b>Incorrect</b>                      subject:text1 and textbody:text2 or attflag:true</p>
<p>The AND/OR logical operator is missing.</p>	<p><b>Correct</b>                      EntireMessage:test AND NOT Entiremessage:hi</p> <p><b>Incorrect</b>                      EntireMessage:test NOT Entiremessage:hi</p>
<b>Spaces-specific conditions</b>	
<p>The extra space(s) between operators is not allowed.</p>	<p><b>Correct</b>                      (NOT subject: test AND NOT textbody :test)</p>
<p>The space after bracket is not allowed.</p>	<p><b>Correct</b>                      (NOT subject: text1)</p> <p><b>Incorrect</b>                      ( NOT subject: text1)</p>
<p>The space before colon is not allowed.</p>	<p><b>Correct</b>                      (NOT subject: test AND NOT textbody:test)</p> <p><b>Incorrect</b>                      (NOT subject : test AND NOT textbody :test)</p>

**3** Click **Search**.

You can perform a new search and optionally save it, or you can view the results of a previously saved search.

## Search syntax for Advanced Search

[Table 15-1](#) describes the search methods that are available in Advanced Search.

**Table 15-1** Search methods and their syntax for Advanced Search

Search method	Syntax	Example and more details
Phrase search	Use double quotation marks around one or more words to search for the exact phrase.	<b>"cloud computing"</b> finds archived messages with this phrase.  See <a href="#">"Phrase searches"</a> on page 321.
AND operator search	Use the AND operator between two search terms to find items that contain both search terms.	<b>cloud AND computing</b> finds archived messages with both of the search terms <i>cloud</i> and <i>computing</i> .  See <a href="#">"Boolean operator searches"</a> on page 322.
OR operator search	Use the OR operator between two search terms to find items that contain at least one of the search terms.	<b>cloud OR computing</b> finds archived messages with the search term <i>cloud</i> , or the search term <i>computing</i> , or both terms.  See <a href="#">"Boolean operator searches"</a> on page 322.
NOT operator search	Use the NOT operator between search terms to exclude specific search terms.	<b>cloud NOT computing</b> finds archived messages with the search term <i>cloud</i> but not the search term <i>computing</i> .  See <a href="#">"Boolean operator searches"</a> on page 322.
Single character wildcard search	Use a question mark at the end of a search term to represent a single unspecified character.  <b>Note:</b> You must enter a search term with at least three characters before the wildcard character.	<b>appl?</b> finds archived messages with search terms such as <i>apple</i> or <i>apply</i> .  See <a href="#">"Wildcard searches"</a> on page 325.

**Table 15-1** Search methods and their syntax for Advanced Search  
*(continued)*

Search method	Syntax	Example and more details
Multiple character wildcard search	Use an asterisk at the end of a search term to represent one or more unspecified characters.  <b>Note:</b> You must enter a search term with at least three characters before the wildcard character.	<b>comp*</b> finds archived messages with search terms such as <i>computing</i> , <i>computer</i> , or <i>company</i> .  See <a href="#">“Wildcard searches”</a> on page 325.
Proximity search	Place quotation marks around two search terms, followed by a tilde and a numerical value to indicate the maximum word count between them.  <b>Note:</b> Alta Personal Archive limits the word count between the 2 search terms to under 50 words.	<b>"cloud computing"~5</b> finds archived messages with the search terms <i>cloud</i> and <i>computing</i> within five words of each other.  See <a href="#">“Proximity searches”</a> on page 325.

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**Note:** Searches are not case-sensitive. Capitalizing a search term has no effect on the search results. Invalid search terms are shown in red; hover over invalid search terms to get additional help via Tool Tip.

---

## About stop words and special characters

### Stop words

Stop words are a set of commonly used words that Alta Personal Archive ignores when it performs a Search or Advanced Search. Alta Personal Archive treats the following words as stop words:

- a, an, and, are, as, at
- be, but, by
- for
- if, in, into, is, it
- no, not
- of, on, or

- **such**
- **that, the, their, then, there, these, they, this, to**
- **was, will, with**

---

**Note:** The stop words are supported in English only, unless your company subscribes to the option to perform enhanced searches in Japanese.

---

Note the following special cases:

- In phrase searches a stop word acts as a placeholder for any stop word, or nothing.  
See [“Phrase searches”](#) on page 321.
- The words AND, OR, and NOT act as operators in a Boolean operator search.  
See [“Boolean operator searches”](#) on page 322.

## Special characters

Alta Personal Archive omits the following special characters from searches:

\* @ # \$ % ^ & - + = \_ { } [ ] , < > ; : / \ ?

Alta eDiscovery prevents you from entering the following special characters into the search boxes: / \ < > #

Note the following special cases:

- In phrase searches a special character acts as a placeholder for any special character, or nothing.  
See [“Phrase searches”](#) on page 321.
- Question marks and asterisks act as wildcard characters in a wildcard search.  
See [“Wildcard searches”](#) on page 325.

## Phrase searches

To search for a phrase, enclose the phrase within double quotation marks. For example:

**"cloud computing"**

The search returns those items that contain the exact phrase *cloud computing*.

---

**Note:** A search produces unexpected results if it contains nothing between the quotes, or only white space between the quotes.

---

## About stop words and special characters within search phrases

A phrase search that includes stop words or special characters can return any of the following:

- The exact phrase, including the stop word or special character.
- The phrase with the supplied stop word or special character replaced by other stop words or special characters.
- The phrase without the stop word or special character.

For example:

- The phrase **"test and verification"** returns items that include the exact phrase, and also phrases such as *test not verification*, *test verification*.
- The phrase with two stop words **"cat in the hat"** returns items that include the exact phrase, and also phrases such as *The cat has no hat*, and *cat hat*.

If the exact phrase occurs in the search results, it is highlighted. Otherwise the phrase is not highlighted.

---

**Note:** In phrase searches, the \* and ? characters are treated as special characters, not wildcards.

---

## Boolean operator searches

You can use the Boolean operators AND, OR, and NOT to include or exclude search terms in Quick Search and Advanced Search.

---

**Note:** The Boolean operators are supported in English only, unless your company subscribes to the option to perform enhanced searches in Japanese.

---

- See [“AND operator search”](#) on page 323.
- See [“OR operator search”](#) on page 323.
- See [“NOT operator search”](#) on page 323.
- See [“About using multiple Boolean operators”](#) on page 323.
- See [“About using Boolean operators with phrase searches”](#) on page 324.
- See [“About Boolean operators and special characters”](#) on page 324.

## AND operator search

The AND operator is inserted in between two search terms, for example:

**cloud AND computing**

The returned results contain both terms.

---

**Note:** Alta Personal Archive treats a space between two search terms as an AND operator.

---

The following searches are treated identically:

**cloud computing**

**cloud AND computing**

## OR operator search

The OR operator is inserted in between two search terms, for example:

**cloud OR computing**

The returned results contain either or both of the terms.

## NOT operator search

The NOT operator can be inserted in between two search terms to specify that the first term must be present, and the second term must be absent. For example:

**cloud NOT computing**

Veritas Alta Archiving also lets you begin a search with a NOT operator. For example:

**NOT "cloud computing"**

This search attempts to return every item that does not include the phrase *cloud computing*.

---

**Note:** Searches that begin with a NOT operator may fail to complete due to the large number of matching results, especially if you have a large message archive.

---

## About using multiple Boolean operators

You can use multiple Boolean operators in a search to create more complex searches. For example:

**cloud AND computing OR public**

In this example **cloud AND computing** represents one term.

The following items are returned:

- Items with *cloud* and *computing*
- Items with *cloud*, *computing*, and *public*
- Items with *public*

You can also use brackets to group multiple terms for Boolean processing. For example:

**(cloud (computing OR public)) NOT software**

In this example, the space between **cloud** and **(computing OR public)** is treated as an AND operator.

The following items are returned:

- Items with both *cloud* and *computing*, with no reference to *software*.
- Items with both *cloud* and *public*, with no reference to *software*.

The maximum number of Boolean operators that is allowed in a search is 249.

## About using Boolean operators with phrase searches

Boolean operators can be used with phrase searches. For example:

**"cloud computing " OR "public cloud" NOT software**

This search returns the following:

- Items with *cloud computing*, with no reference to *software*.
- Items with *public cloud*, with no reference to *software*.
- Items with *cloud computing* and *public cloud*, with no reference to *software*.

## About Boolean operators and special characters

Boolean searches with special character search terms result in invalid searches. For example, if you enter the following:

**cloud OR +**

The special character + is dropped. The effect is a Boolean search with no second term, which is an invalid search.

Here is another example:

**cloud AND – AND computing**

The special character "-" is dropped. The effect is a Boolean search with two adjacent AND operators, which is an invalid search.

## Wildcard searches

A wildcard search uses a wildcard character at the end of a search term to represent one or more unspecified characters. The question mark ? represents a single character, and the asterisk \* represents one or more characters.

For example:

- **appl?** finds archived messages with search terms such as *apple* or *apply*.
- **comp\*** finds archived messages with search terms such as *computing*, *computer*, or *company*.

---

**Note:** The wildcard character must be placed at the end of the search term. The search term must contain at least three characters before the wildcard character.

---

In phrase searches, the \* and ? characters are treated as special characters, not wildcards.

## Proximity searches

Use a proximity search to find two words within a specified distance of each other. To create a proximity search, enclose the two words within quotation marks, and follow them with a tilde character (~) and a numerical value. For example:

**"cloud computing"~5.**

The numerical value specifies the maximum number of words that can exist between the words in quotes.

Note the following when using proximity searches:

- The search terms in the proximity search results are highlighted in the Preview pane and Native views of the attachments. The exact number of words between the search keywords or the order of the keywords does not matter.
- Alta Personal Archive limits the proximity word count to a maximum of 49 words.
- Wildcard characters cannot be used in a proximity search.
- The results from a proximity search can contain stop words, but the stop words are excluded from the proximity word count.

## Double-byte character set searches

Veritas Alta Archiving provides some ability to search those languages that contain double-byte characters.

Phrase searches can be used to search for exact phrases with double-byte characters. For example:

"敏捷の棕色狐狸" AND 3515431

An enhanced search is available for Japanese terms, if you subscribe to the option for enhanced searches in Japanese.

See ["About enhanced searches in Japanese"](#) on page 326.

## About enhanced searches in Japanese

An option is available to enable the ability to perform enhanced searches in Japanese. This option employs a Japanese language analyzer to provide better search results for different Japanese scripts.

To find out if your company's Veritas Alta Archiving supports enhanced searches in Japanese, ask your Veritas Alta Archiving administrator.

---

**Note:** Administrators can contact [Veritas Services & Support](#) for more information on the configuration of this option.

---

If your company's Veritas Alta Archiving supports enhanced searches in Japanese, note the following about the enhanced search capabilities:

- Searches are supported in any combination of hiragana, kanji, katakana, and romaji scripts.
- Searches are valid for text in the message subject, the message body, attachment extensions, and attachment content.
- Alta eDiscovery's Search supports a minimum of one English or Japanese character.
- The wildcard character limit for any search is one English or Japanese character.

## Searchable attachment types

Advanced Search lets you search the content of message attachments.

**Note:** Password-protected attachments and encrypted attachments are not included in searches.

Table 15-2 lists the attachment types that Veritas Alta Archiving can search.

**Table 15-2** Searchable attachments

File extension	Searchable attachment types
.accdb	Microsoft Access (text only) 1.0, 2.0, 95 – 2010
.ai	Adobe Illustrator
.asf	Windows Media ASF (metadata only)
.avi	AVI (metadata only)
.csv	Microsoft Excel for Windows
.dbf	Dbase III, IV, V Enable Spreadsheet
.doc	Microsoft Word for Windows 1.0 – 2013 Microsoft Word 2003 XML (text only) Microsoft Word 98 (J)
.docx	Microsoft Word for Windows Microsoft WordPad
.docm	Microsoft WordPad
.dwg	AutoCAD Drawing 9.0 – 14.0
.emf	Enhanced Metafile (EMF) Visio (Page Preview mode WMF/EMF)
.eml	Microsoft Outlook Express (EML)
.htm	HTML (CSS rendering not supported) 1.0 – 4.0
.html	HTML (CSS rendering not supported)
.hwp	Hangul 97 – 2010
.ics	vCalendar 2.1
.keynote	Apple iWork Keynote (MacOS, text, and PDF preview) 9

**Table 15-2** Searchable attachments (*continued*)

<b>File extension</b>	<b>Searchable attachment types</b>
.mht	Encoded mail messages
.mp3	MP3 (ID3 metadata only)
.mp4	MPEG-4 (metadata only)
.mpp	Microsoft Project (table view only) 98 – 2003, 2007, 2010
.msg	Microsoft Outlook (msg) 97 – 2013
.numbers	Apple iWork Numbers (MacOS, text, and PDF preview) 9
.odg	OpenOffice Draw
.odp	IBM Lotus Symphony Presentations 1.x
.ods	Oracle Open Office Calc 3.x StarOffice Calc
.odt	OpenOffice Writer 1.1 – 3.0 Oracle Open Office Writer 3.x StarOffice Writer
.oft	Microsoft Outlook Forms Template (OFT) 97 – 2013
.one	Microsoft OneNote (text only) 2007, 2010
.ots	Oracle Open Office Calc StarOffice Calc
.ott	OpenOffice Writer Oracle Open Office Writer
.pages	Apple iWork Pages (MacOS, text, and PDF preview) 9
.pdf	Adobe PDF 1.0 – 1.7 (Acrobat 1 - 10) Adobe PDF Package 1.7 (Acrobat 8 - 10) Adobe PDF Portfolio 1.7 (Acrobat 8 - 10) Graphic embeddings in PDF
.pot	Microsoft PowerPoint for Windows Template 2007 – 2013
.potx	Microsoft PowerPoint for Windows Template

**Table 15-2** Searchable attachments (*continued*)

<b>File extension</b>	<b>Searchable attachment types</b>
.pps	Microsoft PowerPoint for Windows slide show 2007 – 2013
.ppsx	Microsoft PowerPoint for Windows slide show
.ppt	Microsoft PowerPoint for Windows 3.0 – 2013
.pptx	Microsoft PowerPoint for Windows
.rtf	IBM DCA/RFT Microsoft WordPad Rich Text Format (RTF)
.stc	Oracle Open Office Calc
.stw	Oracle Open Office Writer
.swf	Flash (text extraction only) 6.x, 7.x, Lite
.sxw	Oracle Open Office Writer StarOffice Writer 5.2 – 9.0
.txt	ANSI Text 7 & 8 bit Unicode Text 3.0, 4.0
.vcf	vCard 2.1
.vcs	vCalendar
.vsd	Visio 5.0 – 2007
.wav	WAV (metadata only)
.wk1	Lotus 1-2-3
.wk3	Lotus 1-2-3
.wma	Windows Media Audio (metadata only)
.wmf	Visio (Page Preview mode WMF/EMF) 4 Windows Metafile
.wml	Wireless Markup Language
.wmv	Windows Media Video WMV (metadata only)
.xhtml	XHTML (file ID only)

**Table 15-2** Searchable attachments (*continued*)

File extension	Searchable attachment types
.xls	Microsoft Excel for Windows 3.0 – 2013
.xlsb	Microsoft Excel for Windows 2007 – 2013 (Binary)
.xlsm	Microsoft Excel for Windows
.xlsx	Microsoft Excel for Windows
.xlt	Microsoft Excel for Windows
.xltm	Microsoft Excel for Windows
.xml	Extensible Markup Language files Microsoft Excel for Windows 2003 XML (text only) XML (text only)
.xmp	Adobe Illustrator XMP CS1 – 6
.xps	Microsoft XPS (text only)
.zip	Compressed file

## Search examples and tips

### Examples of using Basic, Advanced, and Query Searches

Suppose you want to search for the messages that relate to the resetting of a password. You can enter **password reset** into the Search box and click **Search** to perform a Search. The space between **password** and **reset** is treated as an AND operator, so the returned results contain any messages that include both the word *password* and the word *reset*.

Suppose that you now decide to search for the phrase *password reset*, and to exclude from the results any emails that reference the word *Box*. You can use an Advanced Search for this purpose. Click the expand icon to display the Advanced Search options. Your original Search is now shown in the first criteria row.

Insert double quotation marks around **password reset** to specify it as a phrase. Then click **+** to add a second criteria row. In the new criteria row, select **Doesn't Contain** and enter **Box** in the text field.

Click **Search** to perform the search. The search returns any items that do not contain *Box* but that contain the exact phrase *password reset*.

Table 15-3 lists some possible query search terms along with examples.

**Table 15-3** List of query search terms

Search term	Data type	Description	Example
<code>_All, Entiremessage</code>	Text	Searches through all default fields. Add search criterion before query text/value.	<code>_ALL:(samplequerytext1) OR _ALL:(samplequerytext2) _ALL:(test) AND _ALL:(test2) Entiremessage:test</code>
<code>Attachments.content</code>	Text	Search by attachment content.	<code>Attachments.content: "Hello World"</code>
<code>Attachments.extension</code>	Text	Search by attachment file type (PDF, DOC, docx, and so on.)	<code>Attachments.extension:docx</code>
<code>Attachments.filename</code>	Text	Search by the file name of the attachment.	<code>Attachments.filename:Report.PDF</code>
<code>Attcount</code>	Integer	Search by the amount of attachments. <b>Note:</b> This query search term does not support the Searches for the Microsoft Teams messages.	<code>Attcount:6</code>
<code>Attflag</code>	Boolean	Search by whether there is an attachment.	<code>Attflag:true</code>
<code>Atttext</code>	Text	Search the content of the attachments.	<code>Atttext:Computers</code>
<code>Atttypes</code>	Text	Search by the attachment type.	<code>Atttypes:PDF</code>
<code>Cc</code>	Text	Search by carbon copy recipients. <b>Note:</b> This query search term does not support the Searches for the Microsoft Teams messages.	<code>Cc:JoeBlogs@example.com Sender:*@example.com</code>

**Table 15-3** List of query search terms (*continued*)

Search term	Data type	Description	Example
Classification.tags	Text	Search by classification tags. <b>Note:</b> This query search term does not support the Searches for the Microsoft Teams messages.	Classification.tags:PII
FromOrTo	Text	Search the text in the From and/or To fields of the email.	FromOrTo:JoeBlogs@example.com
Hidden	Boolean	Search whether email is visible to end user or not. <b>Note:</b> This query search term does not support the Searches for the Microsoft Teams messages.	Email Hidden: Hidden:(1) Email Visible: NOT Hidden:(1)
Inbound	Boolean	Search inbound emails. <b>Note:</b> This query search term does not support the Searches for the Microsoft Teams messages.	Inbound:false
Ipheader	IP Address	Search by the IP header of the email. <b>Note:</b> This query search term does not support the Searches for the Microsoft Teams messages.	Specific IP Address: Ipheader:(10.201.1.1) IP Address using wildcards: Ipheader:(10.*.1.1) AND Ipheader:(10.201.??.1)
Maildate	Date Time	Search by the date the message was sent.	Closed Range: Maildate: [2018-01-01T00:00:00 TO 2019-12-31T23:59:59] Open Range: Maildate: {2018-01-01T00:00:00 TO 2019-12-31T23:59:59}

**Table 15-3** List of query search terms (*continued*)

Search term	Data type	Description	Example
Messagesizeinkb	Floating Point Number	Search by total size of the email. <b>Note:</b> This query search term does not support the Searches for the Microsoft Teams messages.	Messagesizeinkb:[2.5 TO 5]
Outbound	Boolean	Search whether a user sent the email. <b>Note:</b> This query search term does not support the Searches for the Microsoft Teams messages.	Outbound:true
Sender	Text	Search by the sender address(es).	Sender:JoeBlogs@example.com Sender:*@example.com
Subject	Text	Search by the subject of the email.	Subject:IT
SubjectBody	Text	Search the text in the subject of emails and/or in the content of the email.	SubjectBody:Test
Textbody	Text	Search the text content of the email.	Textbody: "Hello World!"
To	Text	Search by recipient.	To:JoeBlogs@example.com To:*@example.com

Examples of Query Searches:

- MailDate:[2016-05-14T05:00:00 TO 2019-06-18T08:00:00]
- Messagesizeinkb:[0.0 TO 11.5]
- Subject:(export OR report)
- MailDate:[2016-05-14T05:00:00 TO 2019-06-18T08:00:00] AND subject:archive
- Sender:(\*@domain.com OR \*@domain2.com OR \*@domain3.com)
- Atttypes:(pdf OR docx) AND atttext:process
- Attachments.filename:(Report.PDF or Export.docx)

## Searching the From, To, BCC and CC fields

The **To**, **From**, and **From/To** search options are available within an Advanced Search.

- The **To** option provides search results from the **To**, **BCC**, and **CC** fields.
- The **From** option provides search results from the **From** field.
- The **From/To** option provides search results from the **From** and **To** fields.

## Searching within specific email domains

One way to search for items within a specific domain is to enter the domain name in the **To** field of an Advanced Search.

You can use wildcards to search for results from a group of similar domains. For example **mycloud\*** returns emails for the domains that begin with *mycloud*.

# Methods for searching tables and reports

This chapter includes the following topics:

- [About Quick Search and Criteria Search](#)
- [Searching tables, lists, and reports](#)

## About Quick Search and Criteria Search

The following search interfaces are provided for searching the lists or tables that Alta eDiscovery displays, such as lists of user accounts, reviewers, cases, tags, or reports:

- **Quick Search** provides a search based on complete or partial words.
- **Criteria Search.** On some of the pages that provide Quick Search, an additional option named Criteria Search lets you search on specific table criteria.

---

**Note:** Quick Search and Criteria Search do not support phrase search, Boolean operators, proximity search, or wildcard search. Quick Search is available on the following Alta eDiscovery pages. The pages that also have Criteria Search are indicated in brackets.

---

### Investigations tab

- **Managed Accounts > Accounts** (Criteria Search also available)
- **Managed Accounts > Mail reassignment**
- **Batch Processes > Exports**

### eDiscovery tab

- **Reviewers** (Criteria Search also available)
- **Cases**
- **Case Name > Exports**
- **Case Name > Case History** (Criteria Search also available)

Alerts option

- **Search Log**
- **Policy Alert** (Criteria Search also available)

See “[Searching tables, lists, and reports](#)” on page 336.

## Searching tables, lists, and reports

**Quick Search** provides a fast way to search tables and reports in Alta eDiscovery. For some of the more complex tables and reports **Criteria Search** is also available. Criteria Search enables you to search within specific table columns.

---

**Note:** Quick Search and Criteria Search do not support phrase search, Boolean operators, proximity search, or wildcard search. Searches are not case-sensitive.

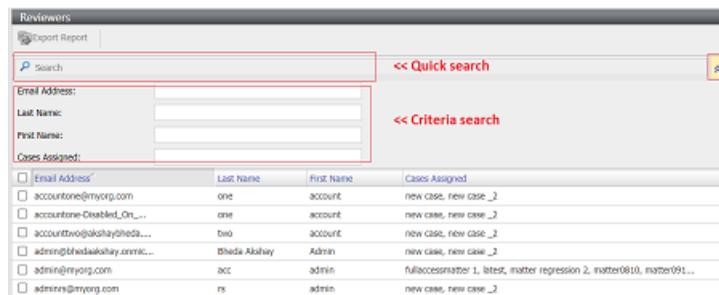
---

### To search tables, lists, and reports

- 1 In Alta eDiscovery browse to the page that contains the table, list or report that you want to search.

The Quick Search interface is visible.

If a Criteria Search is available in addition to the Quick Search, an Expand icon is present at the end of Search box, as shown here on the **Reviewers** node:



- 2 To perform a Quick Search, enter a search term in the **Search** box. Note the following:

- In most cases the search begins as soon as you enter the text.
  - The search is performed on the most significant column of the table, such as the email address, the case name, the user, the export name, the search criteria, or the after value.
  - Search terms can consist of complete or partial words. Quick Search does not support phrase search, Boolean operators, proximity search, or wildcard search.
  - Searches are not case-sensitive.
- 3** On pages that support Criteria Search you can perform a search on specific table criteria. Criteria Search is available on the following pages:
- **Investigations** tab > **Managed Accounts** > **Accounts**
  - **eDiscovery** tab > **Administration** > **Reviewers**
  - **eDiscovery** tab > **Cases** > **Case Name** > **Case History**
  - **Alerts** tab > **Policy Alert**

To perform a Criteria Search, click the **Expand** icon at the end of the Quick Search box, the Criteria Search option is displayed.

Enter your search terms in one or more of the search boxes. Search terms can consist of complete and partial words. Searches are not case-sensitive. Phrase search, Boolean operators, proximity search, and wildcard search are not supported.

Alta eDiscovery returns the search results as you enter the criteria. As you add more criteria the search is filtered on those criteria.

# Alta eDiscovery Frequently Asked Questions

This chapter includes the following topics:

- [Frequently Asked Questions](#)

## Frequently Asked Questions

The following frequently asked questions provide more information about using Alta eDiscovery.

- What browsers does Alta eDiscovery support?  
Alta eDiscovery support is limited to the browsers that are listed in the Veritas Alta Archiving Compatibility List.  
[See the Veritas Alta Archiving Compatibility List.](#)
- Can I use Alta eDiscovery to access my archived messages in Veritas Alta Archiving?  
Yes, you can use Alta eDiscovery to access your messages that are archived in Veritas Alta Archiving. However, certain Alta Personal Archive features such as search filters and active folders are not available from Alta eDiscovery.
- What happens to archived messages when my organization deletes a user account?  
The archived messages of a deleted user remain in your organization's archive. The messages are also searchable by reviewers and administrators with the appropriate permissions.
- When are archived messages removed from my organization's archive permanently?  
Archived messages are permanently removed in accordance with the retention policies in place for your organization.

- What happens to the messages that are sent to a disabled or deleted user account?  
The messages that are sent to a disabled user account are excluded from archiving and do not appear in the archive of the disabled user or the Unassigned Legacy Account. The messages that are sent to a deleted user account appear in the Unassigned Legacy Account.
- Can disabled users access their archived messages in Veritas Alta Archiving?  
No, disabled users cannot access their archived messages in Veritas Alta Archiving.
- What attachment types does Alta eDiscovery support?  
Alta eDiscovery supports a wide range of attachment types:  
See ["Searchable attachment types"](#) on page 326.
- Can I search for calendar items or contacts?  
No, currently archive calendar items and contacts are not archived.
- What is the character limit of search strings?  
You can enter up to 1000 characters in the search field of the Search box.
- Does capitalizing a word affect search results?  
No, search terms are not case-sensitive.
- Are there "stop words" that are excluded from search?  
Yes. In Advanced Search, common words or "stop words" are automatically dropped from searches.  
See ["About stop words and special characters"](#) on page 320.
- How can I search for an exact phrase?  
In Advanced Search, to search for an exact phrase place double quotation marks around the search term.  
See ["Phrase searches"](#) on page 321.
- How can I search for two terms at once?  
In Basic and Advanced Search enter an uppercase AND between two search terms to find emails containing both term. Use an uppercase OR between two search terms to find emails containing at least one of the terms.  
See ["Boolean operator searches"](#) on page 322.
- Can I use Boolean Search Logic?  
Yes, in Basic and Advanced Search you can use a combination of AND, OR, and NOT with your search terms to construct Boolean search criteria.  
See ["Boolean operator searches"](#) on page 322.
- Can I conduct a wildcard search?  
Yes, in Basic and Advanced Search you can use an asterisk or a question mark at the end of a word to conduct a wildcard search.

See [“Wildcard searches”](#) on page 325.

- Can I use the proximity of words as a search criteria?  
Yes, in Basic and Advanced Search you can enter two search terms in quotation marks followed by a tilde and a numerical value to represent the word count proximity.  
See [“Proximity searches”](#) on page 325.
- What is the maximum number of messages that I can export?  
You can export up to 200,000 messages.
- Why is the export to NSF option unavailable in the Export Options?  
The NSF export option is only available when a Domino server has been configured as the mail server type in the archive settings. Contact your Archive Administrator for more information.

# Best practices, limitations, and known issues

This chapter includes the following topics:

- [Best practices and limitations with Alta eDiscovery](#)
- [Known issues with Alta eDiscovery](#)

## Best practices and limitations with Alta eDiscovery

### General

- Although the users that are provisioned for archive access can view their messages from Alta eDiscovery, we recommend that users work with their messages using Alta Personal Archive. Additional functionality such as search filters and active folders is provided when users work with archived messages in Alta Personal Archive.

### Search

- Search times improve after a user performs their first search during each session because Alta eDiscovery keeps the index in memory during each session.
- Inaccurate search results may be returned if the hyphen in a domain name is included because the hyphen is dropped.
- Use Advanced Search to cut down search results. If you see a message stating that you have exceeded the number of search results that can be returned.
- Search terms are limited to 1,000 characters.
- Use Query Search to accurately find and to reduce search results.

- Searching with empty quotes or whitespace within quotes produces unexpected results.
- Searching with an empty field produces an error.
- Tags are only searchable on the **Tags** node, which is located within the **Investigations** tab.
- The search interface prevents the user from entering the following special characters: / \ # < >
- The maximum number of Boolean operands in a search is 249. Note that *roof rusted OR paint* has two Boolean operands: the OR, and the space between the first two terms. The space is treated as an AND operator.

### Foreign language search constraints

- Unable to search for DBCS/hiascii char in the Quick Search field in Alerts.
- Unable to search for DBCS/hiascii char in Policy Names - Alerts.
- Unable to search for DBCs/hiascii char in Advanced/Query search - comments
- Unable to search for DBCs/hiascii char in Advanced/Query search - Alert Emails
- Search fails in Managed Account if last name includes non-ASCII characters
- Search fails in Reviewers Account if last name includes non-ASCII characters
- Corrupted DBCS/hiascii character results in Case Review Status Tag name and description
- Case Status has the hard-code issue risk

## Known issues with Alta eDiscovery

- Saved searches named using Japanese double-byte characters are not saved correctly and result in the search results not being displayed.
- Keywords within a message body may be highlighted inconsistently.
- You may receive a security error message when downloading data from Alta eDiscovery.  
Workaround — close the security error message window and retry the download.
- Bcc recipients are currently not searchable in Alta eDiscovery.
- Due to limitations of Microsoft Exchange journaling, the Bcc recipients currently displayed depends on the version of Exchange the message sender and Bcc recipients use. Please refer to the following table for more information.

**Table 18-1** Exchange versions displayed in Bcc field

<b>Sender Exchange Version</b>	<b>Exchange versions displayed in Bcc field when viewed from Exchange 2010 Environment</b>	<b>Exchange versions displayed in Bcc field when viewed from Exchange 2007 Environment</b>	<b>Exchange versions displayed in Bcc field when viewed from Exchange 2003 (Standard) Environment</b>	<b>Exchange versions displayed in Bcc field when viewed from Exchange 2003 (Envelope) Environment</b>
Exchange 2010	All	Exchange 2007	None	None
Exchange 2007	Exchange 2010	All	None	Exchange 2003 (Envelope)
Exchange 2003 (Standard)	Exchange 2010	Exchange 2007	None	None
Exchange 2003 (Envelope)	Exchange 2010	Exchange 2007	None	All

# Alta eDiscovery updates in previous releases

This chapter includes the following topics:

- [About the Alta eDiscovery updates in previous releases](#)

## About the Alta eDiscovery updates in previous releases

The following page describes the most recent updates for Alta eDiscovery:

See [“Introducing Veritas Alta eDiscovery”](#) on page 9.

For full details of all the updates in each release of the Veritas Alta Archiving service suite, see the Veritas Alta Archiving release notes. You can access the release notes from the following article on the Veritas Support website:

[https://www.veritas.com/support/en\\_US/article.100040129](https://www.veritas.com/support/en_US/article.100040129)