

Veritas Enterprise Vault™ Discovery Accelerator Reviewer's Guide

12.1

Veritas Discovery Accelerator: Reviewer's Guide

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Introducing Discovery Accelerator

This chapter includes the following topics:

- [Key features of Discovery Accelerator](#)
- [About the Discovery Accelerator client](#)
- [Opening the Discovery Accelerator client](#)
- [Finding your way around the Discovery Accelerator client](#)

Key features of Discovery Accelerator

Discovery Accelerator is an electronic discovery and review system that integrates with Enterprise Vault services and archives. Discovery Accelerator lets authorized users search for, retrieve and preserve, analyze, review, mark, and export or produce emails, documents, and other electronic items for lead counsel examination or court-ready production—rapidly and in a cost-effective manner.

Using attorneys and external counsel to review large numbers of items is costly. With Discovery Accelerator, you can create a hierarchy of reviewers for a discovery action or case, with different levels of reviewers able to assign certain review marks. In this way, paralegal staff and non-legal staff can perform an initial review of search and collection results and leave only the privileged, relevant, or questionable items for counsel. Optionally, you can then produce the relevant items with an appropriate *Bates* number or else simply export them from Discovery Accelerator in various formats.

About the Discovery Accelerator client

The client is a feature-rich Windows application with which Discovery Accelerator users can add marks and comments to the items that they review. In addition, administrators can use the Discovery Accelerator client to administer and customize the application. The role to which a Discovery Accelerator user has been assigned determines the features of the client that each user can access.

You perform most of the activities that are described in this guide with the Discovery Accelerator client.

Opening the Discovery Accelerator client

Note the following:

- If you use the Discovery Accelerator client a lot, you may want to create a shortcut for it on the Windows desktop.
- If you want to run the Discovery Accelerator client on a Windows 8/8.1/10 computer then, for optimum performance, we recommend that you run it in Windows 7 or Windows XP compatibility mode. See the Windows documentation for guidelines on how to do this.

To open the Discovery Accelerator client

- 1 Click the shortcut for the Discovery Accelerator client.

After a few moments, the **Select a Discovery Accelerator instance to connect to** dialog box appears.

- 2 In the **Server** box, type the name or IP address of the computer on which the Discovery Accelerator server software is running.

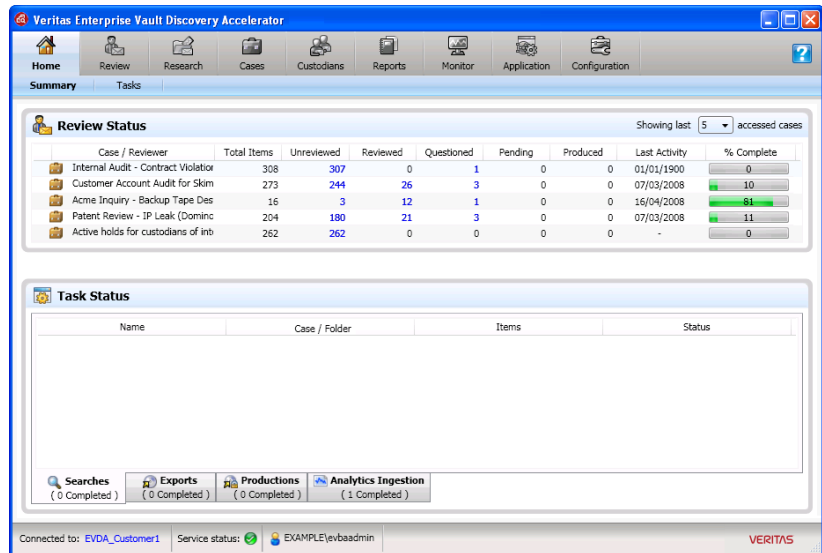
You can type the IP address in either IPv4 or IPv6 format.

- 3 In the **Instance** box, select the Discovery Accelerator *instance* (customer database) that you want to access. Click the down arrow at the right of the box to list the available instances.

Each instance stores the details of a set of cases that you want to review. It also stores the associated user roles, search results, research folders, and more. Therefore, you may have multiple instances from which to choose.

- 4 Uncheck **Ask every time the application is opened** if you always want to connect to the same instance without first displaying the **Select a Discovery Accelerator instance to connect to** dialog box.
- 5 Click **Connect**.

After a few moments, the home page of the Discovery Accelerator client appears.



To close the Discovery Accelerator client

- ◆ Click the close button in the upper-right corner of the window.

Finding your way around the Discovery Accelerator client

In the Discovery Accelerator client, the roles to which you have been assigned determine the features that you can access. [Table 1-1](#) describes the features that users with the most permissive roles can access. Discovery Accelerator administrators can assign multiple different roles to users and change the permissions that are associated with the roles.

Table 1-1 Primary tabs in the Discovery Accelerator client










Icon	Tab	Description
	Home	This tab provides a headline view of the status of the activities that you perform in Discovery Accelerator. It also gives you quick access to the activities that you are likely to perform frequently with Discovery Accelerator.
	Review	This tab lets you view the items in the review set and assign marks and comments to them.
	Research	This tab lets you set up research folders where you can work privately on the items that interest you without generating additional work for other Discovery Accelerator reviewers.
	Cases	This tab lets you open and manage cases. You can also enable analytics on your cases so that you can perform additional analyses of the metadata and content of the items that you have collected in them.
	Custodians	<p>This tab lets you set up email <i>targets</i>, which you can include in the criteria of a Discovery Accelerator search. A target is a shorthand way of specifying all the email addresses of an employee so that you do not need to enter them all when you set up a search.</p> <p>The tab also provides a link to the Custodian Manager website, where you can specify the details of custodians and custodian groups for which you want to search with Discovery Accelerator.</p>
	Reports	This tab lets you generate reports on various aspects of Discovery Accelerator, including the progress of reviewers and their roles and responsibilities.
	Monitor	This tab lets you monitor the status of all Discovery Accelerator searches and pause or resubmit them as necessary.

Table 1-1 Primary tabs in the Discovery Accelerator client (*continued*)

Icon	Tab	Description
	Application	<p>This tab provides access to a range of commonly used administrative facilities. The options that are available when you click this tab may include the following:</p> <ul style="list-style-type: none"> ■ Roles. Set up and amend the roles that you can assign to users to manage their access to Discovery Accelerator facilities. ■ Role Assignment. Assign Discovery Accelerator roles to users. ■ Marks. Set up and edit the marks that reviewers can apply to each item to indicate whether it is relevant to the case. ■ Tags. Define secondary sets of marks, called <i>tags</i>, which reviewers can apply to items in the review set. ■ Archives. Customize the list of Enterprise Vault archives in which Discovery Accelerator searches for items. You can also choose to hide selected vault stores from case administrators so that they cannot conduct searches of the archives in those vault stores.
	Configuration	<p>This tab provides access to a range of configuration facilities that you are likely to use infrequently. The options that are available when you click this tab may include the following:</p> <ul style="list-style-type: none"> ■ Search schedules. Set up schedules with which you can run Discovery Accelerator searches repeatedly, at scheduled times. ■ Search Attributes. Specify the details of custom attributes that you can include in your search criteria. ■ Import Configuration. Import configuration data into Discovery Accelerator from an XML file. ■ Account Information. Supply the details of multiple Windows domains from which you can choose when you add a new user to your Discovery Accelerator system. ■ Settings. Set hundreds of configuration options with which you can customize the appearance and performance of Discovery Accelerator.

Searching for items

This chapter includes the following topics:

- [Creating and running Discovery Accelerator searches](#)
- [About the search criteria options](#)
- [Guidelines on conducting effective searches](#)

Creating and running Discovery Accelerator searches

You must have the Search permission in a case or folder to create and run a search in it. If you have the Search Preview permission, you can preview the results of a search before you accept them.

To create and run a Discovery Accelerator search

- 1 Do one of the following:
 - To create a search that runs in a case, click the **Cases** tab in the Discovery Accelerator client and then click the required case in the left pane.
 - To create a search that runs in a research folder, click the **Research** tab in the Discovery Accelerator client and then click the required folder in the left pane.

If Discovery Accelerator lists a lot of cases and folders, you can filter the list with the fields at the top of the pane.

- 2 Click the **Searches** tab.

3 Click New Search.

The search properties pane appears.

Search

Context: Internal Audit - Contract Violations

Name:

Based on Search: <No Template>

Search Type: Immediate

☐ Automatically accept search results

☐ Include items already in review

Date range

Date range: Specific date range

From:

To:

☒ Use Historical Information for Custodians and Custodian Groups

Search terms

Multiple words on a single line are connected with an OR unless placed in double quotation marks (e.g. "search phrase").

To or from: Any of:

4 If you are creating a search that runs in a research folder, and you clicked **All Research** in the left pane, Discovery Accelerator prompts you to select a case with which to associate the search. Make your selection, and then click **Search**.

5 Enter the required search criteria.

See [“About the search criteria options”](#) on page 15.

- Click **Save** to start an immediate search or queue a scheduled search to start automatically at the appointed time.

Discovery Accelerator displays a preview list as soon as it finds a search result. You can immediately begin to read items from the preview display, and, if necessary, stop a search that does not return the results that you expect. Then you can refine the search criteria and perform the search again.

The **Search Details** pane provides the following information:

Archive	Shows the name of the archive that Discovery Accelerator has searched.
Volume	Provides the ID of the volume that holds the archive.
Vault Store	Indicates the type of vault store that contains the archive.
Status	Shows the current status of the search in each archive.
Duration	Shows the amount of time that Discovery Accelerator has taken to search each archive.
Hits	Shows the number of items in each archive that match the search criteria.
Information	Provides details of any errors that occurred.

You can filter the list of archives by selecting an option in the **Show** list. For example, you can filter the archives to show the top 2000 archives by hits, or all archives with a status of "Error". To download the search details as a comma-separated value (CSV) file, click **Download Search Details for All Archives**.

- When the search has completed, choose whether to accept or reject the results. Note the following:
 - Discovery Accelerator does not add the captured items to the review set until you accept the search results. If you did not check **Automatically accept search results**, you must manually accept or reject the results.
 - The options to assign a default mark and reviewer to the search results apply only to newly discovered items. If the search results include items that you have previously captured and added to the review set, these items retain their assigned marks and reviewers.
The option to keep existing marks applies only to those items to which reviewers have already assigned marks in another case.

- If you reject the results of a search, Discovery Accelerator deletes the search and results from the database. However, it leaves the actual items in the archives.
- It is important that search results make sense because, after you accept the search, you cannot undo it.

About the search criteria options

Discovery Accelerator groups the search criteria options into multiple sections, which are described below. Click the arrow icons at the right to expand or collapse the sections.

When you construct a search that contains multiple options, pay attention to how each option interacts with the others in the search properties pane. Discovery Accelerator links all the selected options together with Boolean AND operators rather than OR operators. For example, suppose that you construct a search whose criteria include the following:

- A data range in the **Date range** section
- A search term in the **Search terms** section
- A file extension in the **Attachments** section

The search results contain only those items that match all the search criteria. Discovery Accelerator ignores any items that match some of the search criteria options but not others.

The search properties pane has the following sections:

- [Search section](#)
- [Date range section](#)
- [Search terms section](#)
- [Archives section](#)
- [Attachments section](#)
- [Miscellaneous section](#)
- [Policies section](#)
- [Custom attributes section](#)

Search section

The Search section identifies the search and specifies when it runs.

Context	Identifies the case or research folder in which the search runs. When the folder is not linked to any case, "My Research" appears.
Name	Specifies a name for the search, such as "Daily Message Capture (London)".
Based on Search	Lets you select an existing search as the basis on which to set the criteria for the new search.
Save results in	<p>If displayed, lets you select a location in which to save the results. Select New folder in <Context> in the drop-down list if you want to specify the details of a new folder in which to save the results.</p> <p>This option is available only when you create a search in a folder that is not linked to any case (you have selected "My Research" in the left pane).</p>
Search Type	Specifies whether the search runs immediately or at a scheduled time. If you select Scheduled, you can specify a period during which the search is to run. You can also choose from one of a number of existing schedules.
Automatically accept search results	<p>Specifies whether to add the search results to the review set automatically. This option may be useful for any proven searches that you intend to run on a regular basis. If you check Automatically accept search results, you cannot reject the results and change the search criteria. We recommend that you uncheck Automatically accept search results until you have tested that the search returns the expected results.</p> <p>A search that returns an error from any archive is not automatically accepted, regardless of this setting.</p>
Include items already in review	Specifies whether the search results can include the items that you have previously captured and added to the review set. For an immediate search or scheduled search, we recommend that you check this box to ensure that the results include the items that may already be in review from other searches.

Date range section

The Date range section lets you search for items according to when they were sent or received.

Today / Yesterday / Last 7 days / Last 14 days / Last 28 days Limits the search to items that were sent or received during the selected period. The date ranges are relative to when the search runs, which is today in the case of an immediate search.

You may find these options useful when creating a scheduled, recurrent search that runs once every day, week, two weeks, or four weeks. For example, if the search runs once a week, select **Last 7 days** to limit the range to the days since the search last ran.

Specific date range Lets you search the items that were sent or received during a longer or more specific period than the other date range options permit. To enter a date, click the options at the right of the **From** and **To** boxes and then select the required date. Unlike the other date range boxes, a specific date range remains static and not relative to when the search runs.

Check **Use Historical Information for Custodians and Custodian Groups** to use both the current information and historical information for custodians and custodian groups in the search. If you uncheck this option, Discovery Accelerator uses only the current set of custodians, groups, and email addresses. Any users or groups whose names or email addresses have changed, or who have been deactivated for some reason, are excluded from the search.

Since search last ran For a scheduled search only, lets you search the new items that have arrived since the last time you ran the search. This option is similar to options such as Today and Yesterday. However, it lets you set an explicit start date for the first run of the search.

By default, this option searches from the date of the last run (or the start date for the first search) to the current day minus 1 (that is, up to yesterday).

Search terms section

The Search terms section specifies the words or phrases for which Discovery Accelerator should search in items. Click **Add search term** to add each word or phrase for which you want to search. Note the following:

- Discovery Accelerator searches are case-insensitive.
- To search for a phrase, enclose the words in quotation marks.
 For example, you can search for all items whose subject lines contain the phrase "organizational changes" by defining a search term like this one:

SUBJ: "organizational changes"

Discovery Accelerator considers the file names of message attachments to be their subjects. So, the preceding search term finds both items that contain the phrase "organizational changes" in their subject lines and attachments that have this phrase in their file names.

- If you type multiple words on the same line, Discovery Accelerator finds all items that contain any of the words or phrases on the line.

Note that you must separate all the words in the search term with spaces. The following search term does not return the expected results because there is no space between words the "changes" and "license"—and consequently Discovery Accelerator searches for items that contain one or more of the following words: "organizational", "changeslicense", and "agreements".

```
SUBJ: "organizational changes""license agreements"
```

Similarly, the search terms `license;agreements` and `license; agreements` differ because, in the second case, a space follows the semicolon. The presence of the space causes Discovery Accelerator to find the items that contain either word, whereas the absence of the space causes Discovery Accelerator to treat the search term as a phrase.

- Press the Return key in a search box to add another line to it. If you type multiple lines in a search box, choose **Any of** or **All of** in the left box to determine whether OR or AND conditions connect the lines.
- To add the details of email targets or custodians to the **From** box or **To** box, click the **Targets and custodians** button at the right of the box.



Note: If you specify as a target or custodian a Domino user whose details you synchronize with a Domino directory, you must ensure that this user has an SMTP address defined in the Domino directory. Otherwise, the search fails to find the matching items. Alternatively, you can search for such users by their display names.

- Use the fields in the **Custodian Manager options** area to specify how to search for custodians or custodian groups. You can choose to search email addresses, display names, or both email addresses and display names. If you select **Use Email Addresses and Display Names**, a custodian or custodian group must have either a matching email address or a matching display name to meet the search criteria; it does not need to have both.

Select **Include member addresses for distribution lists** if you want Discovery Accelerator to search not only the display name and email address of a custodian group but also the email addresses of all the members of the group.

The conditions that you enter in the **Custodian Manager options** area use the custodian information that is available at the time that you build the search. This information is not updated unless you edit the search again. For example, when you create a search and select the option **Include member addresses for distribution lists**, the list members at that time are saved with the search. If the membership of the list changes later, these changes are not applied to the search until you edit and save it again.

- Place the plus sign (+) in front of a word or phrase to connect it to every other word or phrase on the line with a Boolean AND condition. This sign instructs Discovery Accelerator to treat the specified word or phrase as required criteria. For example, the following search string means "(server AND test) OR (group AND test) OR (cluster AND test)":

```
[Any Of] server group +test cluster
```

In the following example, the search string means "(server AND test AND group) OR (cluster AND test AND group)"

```
[Any Of] server +group +test cluster
```

- Place the minus sign (-) in front of a word or phrase to connect it to every other word or phrase on the line with a Boolean AND NOT condition. This sign instructs Discovery Accelerator to exclude from the result set those results that match the other search criteria and contain the excluded term. For example, the following search string means "(server AND NOT test) OR (group AND NOT test) OR (cluster AND NOT test)":

```
[Any Of] server group -test cluster
```

In the following example, the search string means "(server AND cluster AND (group AND NOT test))":

```
[All Of] server
          cluster
          group -test
```

A search term cannot comprise an excluded word or phrase only. When you specify such words or phrases, you must also specify a positive word or phrase that you want to appear in the search results.

- You can use an asterisk (*) wildcard to represent zero or more characters in your search. Use a question mark (?) wildcard to represent any single character.

A wildcard search always finds items that match your search criteria and that were archived in Enterprise Vault 10.0 or later. To ensure that the search results also include items that Enterprise Vault 9.0 or earlier has archived, enter at least three other characters before the wildcard. For example, the following search string returns hits for the words "make", "maker", "making", "wonder", "wondering", and so on:

```
[Any Of] mak*
Wonder*
```

You can include wildcard characters in the email addresses that you specify in a **From** box or **To** box. The following example finds items from users with an email address that includes "@acme.uk" or "@acme.hk":

```
[Any Of] @acme.?.k
```

However, you cannot use either wildcard character after a special character, such as the ampersand (@). For example, the search string "@?cme.uk" does not produce the expected results.

- Discovery Accelerator ignores any nonalphanumeric characters in the search term, except for those that have special significance, such as the plus sign, minus sign, and question mark.

For example, a search for the term **US@100** may find instances not only of **US@100** but also of **US 100** and **US\$100**. Including nonalphanumeric characters in the search term may therefore return more results than you expect.

Archives section

Note: This feature is available only if you have the Select Archives in Search permission in the case.

The feature is not available when you define the criteria for a scheduled search; you can use it when you set up immediate searches only.

The Archives section lets you restrict the scope of a case-level search or folder-level search to certain archives only. By default, Discovery Accelerator searches all the archives in the vault stores that you have selected for the case. However, this may be undesirable and time-consuming if Discovery Accelerator must search many thousands of archives unnecessarily.

To select the archives in which to search

- Click **Search these archives**.
- Click the **Archive Picker** option at the right.

3 In the **Select Archives** dialog box, select the required archives.

You can select up to 5000 archives from the case-level archive list.

4 Click **Apply**.

Attachments section

The Attachments section lets you search for items with a certain number or type of attachments.

Number Specifies the required number of attachments. The default option, "Does not matter", means that the item can have zero or more attachments. All the other options require you to type one or two values that specify the required number of attachments.

File extensions Specifies the file name extensions of particular types of attachments for which to search. Separate the extensions with space characters. For example, type the following to search for items with HTML or Microsoft Excel file attachments:

.htm .xls

This search option evaluates attachments by their file names only; it does not check their file type. For example, suppose that a user changes the file name extension of a .zip file to .zap and then sends the renamed file as an email attachment. A Discovery Accelerator search for items that have attachments with a .zip extension does not find the email with the renamed attachment.

The contents of some attachments may not be searchable because Enterprise Vault has not indexed them. In particular, file formats such as Fax and Voice do not have any indexable content.

For more information on how Discovery Accelerator conducts searches in which you have specified file name extensions, see the following article on the Veritas Support website:

<http://www.veritas.com/docs/000016765>

Miscellaneous section

The Miscellaneous section lets you search for items of a certain size and type or that have the specified retention category.

Message size	Specifies the size in kilobytes of each item for which to search, as reported by the message store (Exchange, Domino, and so on). The item size includes the size of any attachments.
Message type	Searches for items of the selected types.
Include only non-indexed items	<p>Lets you search for the unindexed items that do not normally appear in the search results, such as binary files and encrypted mail items.</p> <p>If you check this option, you must leave the Content field empty.</p>
Retention category	Searches for items to which Enterprise Vault has assigned the selected retention categories.

Policies section

The Policies section lets you search for items according to the tags with which any additional policy management software has classified them.

Policy

Lets you search for the items that match certain classification policies. There are several types of policies:

- **Inclusion.** Any item that your policy management software has classified for inclusion in the review set may be guilty of the most serious offenses, such as swearing, racism, or insider trading. You would normally want to ensure that the items exhibiting any of these features were included in your review set.
- **Exclusion.** Spam items and newsletters are typical examples of the items that your policy management software may classify for exclusion from the review set.
- **Category.** Your policy management software may categorize the items that exhibit certain characteristics, such as containing Spanish text. This type of policy provides no information on whether an item should be included in or excluded from the review set.

These policy types are not mutually exclusive. Your policy management software may apply multiple policies of different types to the same item. However, note that inclusion policies always take precedence over the other types of policies.

Select the required policy type and then check the names of the policies for which you want to search. Alternatively, you can select **Custom** as the policy type and then type the names of one or more policies. Separate multiple policy names with commas, like this:

CustomPolicy1,CustomPolicy2

If you choose to search for multiple policies, the search results will contain items that match any one of the policies.

Filter policies by current case Lets you omit from the list those policies that are not in use in the current case.

Custom attributes section

The Custom attributes section lets you search for the items that have the specified attributes. When Enterprise Vault processes an item, it populates a number of the item's attributes with information and stores this information with the archived item. Some third-party software may also attach additional attribute information to items. If you know the name of an attribute that interests you, you can enter its details here as a custom attribute.

Note the following:

- If you enter the details of several attributes, use the options in the **Attribution inclusion** box to determine whether the search results should match any of the attributes or all of them.
- For attributes that accept string values, you can add the details of email targets or custodians by clicking the **Targets and custodians** buttons at the right of the boxes.

If you set **Custodian Manager options** to **Use Email Addresses and Display Names**, it is important to understand how Discovery Accelerator processes the details of any custodian that you enter in a custom attribute field. Discovery Accelerator links the custodian's email address to the display name with either a Boolean AND operator or an OR operator, depending on what you choose in the **Operator** box. For example, with **Operator** set to **All**, only items that match both the custodian's email address and the display name meet the search criteria; an item that matches just one of these details does not meet the search criteria. Set **Operator** to **Any** to link the email address and display name with an OR operator. Then any item that matches at least one detail (but not necessarily both) meets the search criteria.

- To search for attribute information that third-party software has added to the X-Headers of SMTP items, add the prefix **EVXHDR.** to the name of the required attribute. For example:

EVXHDR.X-CompanyID

The attribute name and value are case-sensitive.

- Do not enclose attribute values in quotation marks if you want to indicate that they are phrases. Instead, select **Phrase** as the operator for these attributes, if you have a choice. Alternatively, you can indicate that an attribute value is a phrase by replacing all the spaces with periods, as follows:

sample.attribute.value

This technique lets you specify multiple phrase values for the same custom attribute. For example, consider the following attribute value:

Enterprise.Vault.Service.Account system DA.Administrator

This value matches "Enterprise Vault Service Account", "system", and "DA Administrator".

See [“About the Enterprise Vault search properties”](#) on page 97.

Guidelines on conducting effective searches

For the best results when conducting searches, follow these guidelines:

- Make searches precise. For example, include the author or recipient details, or specify date ranges.

- In the properties of the case, limit the number of searchable vault stores.
- Only use wildcards when necessary, as they can severely affect performance.
- Avoid overusing search terms. Thousands of terms can cause iterative searches.
- Ensure that scheduled searches do not run at the same time as system backups.
- Quickly accept or reject searches to avoid filling and slowing the database.
- Test new searches in research folders, and then delete the folders as necessary.

For extensive information on how to conduct searches with Discovery Accelerator, see the *Effective Searching* white paper. This is available from the following page of the Veritas Support website:

<http://www.veritas.com/docs/000068583>

Manually reviewing items

This chapter includes the following topics:

- [About reviewing with Discovery Accelerator](#)
- [About the Review pane](#)
- [Filtering the items in the Review pane](#)
- [Searching within the review set](#)
- [Finding all items in the same conversation](#)
- [Assigning review marks and tags to items](#)
- [Adding comments to items](#)
- [Viewing the history of items](#)
- [Displaying printable versions of items](#)
- [Downloading the original versions of items](#)
- [Copying the item list to the Clipboard](#)
- [Changing how the Review pane looks](#)
- [Setting your Review pane preferences](#)

About reviewing with Discovery Accelerator

After you have performed a search and gathered together the potentially relevant items, selected individuals can review the search results. These reviewers read each item, select the appropriate status mark to assign to it, and add a comment as necessary. Items can be reviewed more than once, and other reviewers can add more comments or change the assigned mark.

Some items may have extra marks, called *tags*, from which you can choose. These tags are available at the bottom of the Review pane and are usually set up especially in response to questions from a judge.

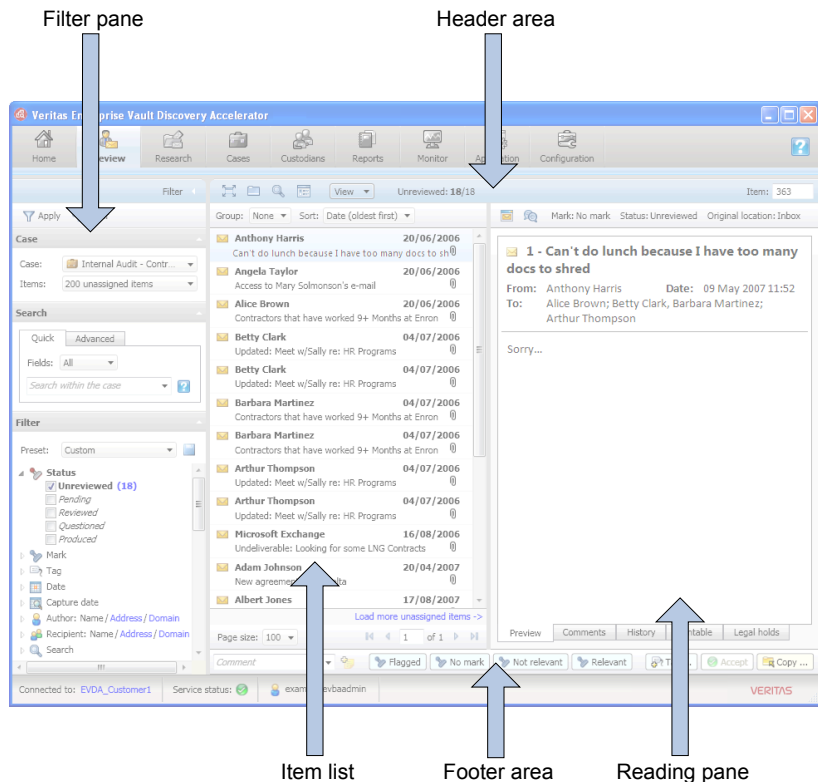
You must have the Review permission to review items.

To access the Review pane

- ◆ Click the **Review** tab in the Discovery Accelerator client.

About the Review pane

The Review pane lets you review and mark the items in a review set. The pane is divided into the following areas:



The following sections describe each area of the Review pane. You can also read more about them in the *Effective Reviewing* white paper, which is available from the following page of the Veritas Support website:

<http://www.veritas.com/docs/000002863>

The following sections describe the areas of the review pane:

- [Header area](#)
- [Filter pane](#)
- [Item list](#)
- [Reading pane](#)
- [Footer area](#)

Header area

The header area provides options for customizing the view and selecting different items to display.



Maximizes the Review pane by hiding the button bar across the top of the Discovery Accelerator window. Click the button again to restore the button bar.



Lets you view the items that you have copied to a research folder for further investigation.

See [“About research folders”](#) on page 64.



Lets you perform a search that is based on the currently selected item.



Sets your preferences for the Review pane.
See [“Setting your Review pane preferences”](#) on page 62.

View

Lets you hide or change the position of the Reading pane and set the size of the text to display in it.

Unreviewed

Shows the number of items in the list that you have yet to review.

Item

Shows the Discovery Accelerator ID of the highlighted item. If you know the ID of an item that you want to review, type it here and then press the Enter key to display the item.




Group

Groups the items in the list by date, author, subject, or policy action.

Display or hide the items in a group by clicking the down-arrow or up-arrow button at the left.

Sort

In lists where you have chosen not to group the items, lets you sort the items by date, author, subject, or policy action.

Stack	<p>Lets you hide or show duplicate items and similar items in the review set. Discovery Accelerator considers items to be duplicates when they have exactly the same content. The items that Discovery Accelerator considers to be similar have the same metadata properties, such as their author display names, subjects, and number of attachments.</p> <p>The option to hide or show duplicate items is available only in cases that you have enabled for analytics. However, the option to hide or show similar items is available in all cases, regardless of whether you have enabled them for analytics.</p> <p>If you sort the items before you select an option in the Stack field then, after you have selected the Stack option, the items may no longer be in the original sort order. For example, this is the case if you first choose to sort the items by the Author column and then select one of the Stack options.</p> <p>For more information on the deduplication features in Discovery Accelerator, see the <i>Accelerator Deduplication</i> white paper. This is available from the following page of the Veritas Support website:</p> <p>http://www.veritas.com/docs/000002529</p>
	<p>Downloads the current item in its original form and opens it in the appropriate application. You can also download an item by right-clicking the item and then clicking View original.</p>
	<p>Finds all the items that share the same subject line as the selected item. This feature also generates a hierarchy view for Exchange mail items.</p>
	<p>Sends the current item for printing.</p>
Mark	<p>Shows the mark that is assigned to the current item.</p>
Status	<p>Shows the status of the current item.</p>

Filter pane

The filter pane provides a large number of criteria by which you can filter the items in the list. The number next to each filter option shows the number of matching items that Discovery Accelerator will add to the item list when you apply the selected filters.

See “[Filtering the items in the Review pane](#)” on page 31.

Item list

The item list shows the items in the review set that match the filter options you have selected. Unreviewed items display in bold text.

Any items that are colored blue are also in a research folder that is associated with the case.

Note: Discovery Accelerator stores the date and time values for items as Coordinated Universal Time (UTC). However, in the item list and right-hand Preview pane, it converts these values according to your computer's local time zone setting. As a result, two Discovery Accelerator reviewers in different time zones may see different dates and times for the same items.

This is the expected behavior, and it is identical to the way that applications like Microsoft Outlook show the dates and times of items.



Reading pane

The tabs at the bottom of the Reading pane have the following functions:

Preview	Displays an HTML preview of the current item.
Comments	Shows the comments that reviewers have assigned to the current item.
History	Displays the comment and audit history of the current item.
Printable	Displays a printable version of the current item.
Legal holds	Displays information on any holds that you have placed on the current item to stops users from deleting it from their Enterprise Vault archives.

Footer area

The footer area provides facilities for navigating from one item to another and applying marks and comments to those items.

	Displays the first page of items for review.
	Displays the previous page of items for review. Pressing the key sequence Alt+z performs the same function.

n of m

Shows the number of the currently displayed page and the total number of pages. To go to a particular page, type its number in the box and then press Enter.



Displays the next page of items for review. Pressing the key sequence Alt+x performs the same function.



Displays the last page of items for review.

Comment

Lets you type a comment to add to the selected items.

In the item list, the comment indicator symbol in the **Comment Present** column indicates that one or more comments have been added to the items.

No mark/Relevant/Flagged/
Not relevant

Applies the required mark to the selected items.



If displayed, lets you accept the mark or tag with which Discovery Accelerator has automatically categorized the selected items.



If displayed, lets you apply tags (secondary marks) to the selected items.

Tags differ from marks in that you can assign multiple tags to an item, but you can assign one mark only. In addition, by assigning a mark to an item, you also assign the associated status to it. This is not the case with tags, which do not have an associated status.



If displayed, lets you delete one or more items from the review set.



If displayed, lets you select a research folder in which to copy either the selected items or all the items in the current review set.

Filtering the items in the Review pane

The options at the left of the Review pane provide a large number of criteria with which you can filter the items for review.





To filter the items in the Review pane











- 1 In the **Case** drop-down list at the top of the filter pane, select the case or folder for which you want to display the items in the review set.
- 2 In the **Items** drop-down list, select a group of items that you want to review. The options are as follows:









Temporary Assignment	This option lets you reserve the specified number of items in the review set. Other reviewers cannot see these items until you have finished work on them.
All Items	<p>This option lets you view all the items in the review set, even if they have been assigned to other reviewers.</p> <p>You may duplicate the work of other reviewers if you use this option. Therefore, we recommend that you select this option only if there are no other reviewers working alongside you, or you want to browse the items without marking them.</p>
My Items	This option lets you review any items that your case administrator has assigned to you.

- 3 If you have enabled analytics in the selected case, use the facilities in the **Search** area to find items that match your specified criteria.
See [“Searching within the review set”](#) on page 35.
- 4 In the **Filter** section, select the *facets* (item classifications) that you want to apply. To show the available values, click the facet name or the arrow at the left of the name.

The following table lists all the available facets in alphabetical order.

	Attachment type	(Available only in cases that you have enabled for analytics.) Selects items by the type of file that is attached to them.
	Author	<p>Selects items by the name of the person who sent them.</p> <p>In cases that you have enabled for analytics, you can also select authors by their email addresses or domains.</p>
	Capture date	Selects items that Discovery Accelerator has captured over the specified period.
	Comment	Selects items to which reviewers have added comments.

	Date	Selects items by the date on which they were created.
	Direction	<p>Selects items that have traveled in the specified direction. The options are as follows:</p> <ul style="list-style-type: none"> ■ Internal. Selects items where the author and all recipients are internal to your organization. ■ External Inbound. Selects items where the author is external to your organization and at least one recipient is internal. ■ External Outbound. Selects items where the author is internal to your organization and at least one recipient is external.
	Ingestion status	(Available only in cases that you have enabled for analytics.) Selects items by the status of their retrieval from the Enterprise Vault archives into your Discovery Accelerator customer database.
	Last marked by	Select items by the reviewer who last assigned a mark to them.
	Legal hold status	Selects items by their legal hold status in the case.
	Mark	Select items by the mark that reviewers have assigned to them.
	Marked by rule	(Available only in cases that you have enabled for analytics.) Selects items by the rule that you have used to mark them automatically.
	Number of attachments	Selects items by the number of attachments that they have.
	Policy	Selects items by the policy with which your policy management software has tagged them.
	Policy action	<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"> ■ Include (demands or suggests capture in the review set). ■ Exclude (precludes capture or advocates non-capture in the review set).

	Recipient	(Available only in cases that you have enabled for analytics.) Selects items by the names, email addresses, or domains of their recipients.
	Scheduled search	Selects items that one or more scheduled searches have captured.
	Search	Selects items that one or more searches have captured.
	Size (KBytes)	Selects items by their size in kilobytes.
	Status	Selects items by their status, such as Pending or Questioned.
	Tag	Select items by the tags that reviewers have assigned to them.
	Tagged by rule	(Available only in cases that you have enabled for analytics.) Selects items by the rule that you have used to mark them automatically.
	Type	Selects items by their type.

Note the following:

- Each facet value is a hyperlink that, when clicked, selects that value and immediately filters the item list accordingly. Click the facet value again to remove it from the filter.
 If you have already selected one or more values within the same facet, clicking another one deselects the others. However, it does not affect any values that you have selected within other facets.
- The numbers next to the facet values show the number of matching items. After you apply the filter, Discovery Accelerator updates these numbers to show how many of the items are now in the item list. For example, the values for the Author facet initially show the number of matching items in the entire review set. If you then set the value of the Status facet to Unreviewed and apply this filter, the Author values are updated to show only the number of unreviewed items for each author.
 Facet values that are shown in an italicized font do not have any matching items in the current item list.
- When you select two or more values for a facet, Discovery Accelerator looks for items that match any of the values. For example, you can choose to view all the items that have a status of Pending or Questioned by selecting both values.

When you select values for two or more different facets, Discovery Accelerator looks for items that match all the facets. For example, selecting the status value Pending and the type value Exchange matches only those items that have a status of Pending and a type of Exchange.

- When a facet has a large number of possible values, Discovery Accelerator displays an abbreviated list of the most relevant values. You can add more values to the list by clicking the blue hyperlinks at the end of the list.
- If you frequently use the same facet settings to filter the items in the Review pane, you can save them as a preset by clicking the **Save** button at the right of the **Preset** box. Then you can quickly apply the settings by selecting the preset from the drop-down list.
- You can apply marks to items by right-clicking the facet values. For example, to mark all the items by a particular author, right-click the author's name in the list and then click **Mark all items**.

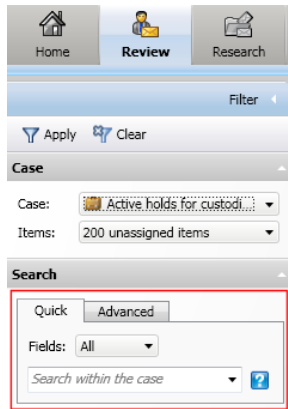
5 Click **Apply** at the top of the filter pane.

If you have used any feature that is only available in cases that are enabled for analytics, you may see the message "Results may be incomplete due to partial ingestion". This occurs when the number of retrieved items is not the same as the total number of items in the case. For example, some of the items in the case may have been deleted from Enterprise Vault before you enabled the case for analytics.

Searching within the review set

When a case has been enabled for analytics, the filter area at the left of the Review pane provides additional options with which you can conduct searches of the items in the review set. Two types of searches are available: quick search and advanced search.

Figure 3-1 Quick and Advanced search tabs in the Review pane



Conducting quick searches

Use the quick search feature to specify one or more fields for which you want to search, such as From or Subject, and the required values.

The following table lists quick search features and gives examples of how you can use them in your searches:

Table 3-1 Quick search features

Feature	Examples
Boolean operators	bill AND sue bill OR bob bill AND NOT "bill smith"
Brackets	(bill OR sue) AND (bill OR bob)
NEAR operator	stock NEAR price
Search scope	from:bob AND (subject:stock OR subject:"share price")
Wildcards	stock* OR share*

To conduct a quick search

- 1 On the **Quick** tab in the **Search** area at the left of the Review pane, set the scope of the search. You can do either of the following:

- Choose the required message attribute in the **Fields** list. For example, choose **Subject or content** to search the subject lines and bodies of all the items in the review set.
- Type one of the following attribute keywords in the "Search within the case" field, and then follow it with a colon and the word or phrase for which to search: all, from, to, fromto, subject, content, subjcont. For example, type `from:Bob` to search for items whose author is Bob.

The second method of setting the search scope overrides the first.

- 2 If you have set the search scope by choosing an attribute in the **Fields** list, type the word or keyword for which to search in the "Search within the case" field.
- 3 Click **Apply**.

Note that you cannot save the criteria for a quick search. However, the **Quick** tab retains a history of recent searches that you have conducted. This history is not specific to the case, but contains searches for all analytics-enabled cases.

Conducting advanced searches

The advanced search feature lets you build complex searches that comprise multiple conditions. Unlike quick searches, you can save advanced searches for reuse.

To conduct an advanced search

- 1 On the **Advanced** tab in the **Search** area at the left of the Review pane, click **New search**.

The Advanced search dialog box appears.

- 2 Type a name and description for the search.
- 3 In the **Search builder** area, define one or more conditions that an item must meet. To define the conditions, proceed as follows:
 - In the **Select attribute** drop-down list, choose an attribute of the items for which to search. For example, choose Subject if you want to search the subject lines of items.
See [“About the search attributes”](#) on page 40.
 - In the next drop-down list, choose an operator to apply to the selected attribute. For example, if you have set the attribute to Subject, you can choose the Contains operator to search for items whose subject lines contain certain words.
See [“About the operators”](#) on page 50.
 - Set the required value for the attribute. For example, when the attribute is Subject and the operator is Contains, you can type **Secret** to search for items whose subject lines contain this word. Note the following:
 - The search string cannot contain any punctuation characters other than the underscore character.
 - You can append an asterisk (*) as a wildcard character to the end of the search string.

- SQL Server does not index commonly occurring words such as "the" and "and", so Discovery Accelerator ignores these words when it encounters them in a search string. You can override this behavior by editing the SQL Server stopword file.

See ["About SQL Server stopwords"](#) on page 53.

- If you set the attribute to Subject, Content, or Subject or Content, choose whether to turn search stemming on or off.
Stemming lets you match words that derive from the word that you specify. For example, the word "run" matches "running" and "ran". You cannot use wildcard characters in conditions that use stemming.
- Click the + button to save the condition and add another one, if required. For example, you may want to search for items whose Author field contains a nominated author and whose Subject field contains a specified string. You define the relationship between two conditions with the **And/Or** buttons. **And** denotes that an item must match both conditions, whereas **Or** denotes that the item can match one condition but not the other.
- If you want to remove a condition, click the - button at the right of its row.

As you add conditions, they appear in the **Search query** area. When you become familiar with the query language, you can construct more complex queries by editing the syntax manually.

See ["Manually editing queries in analytics rule definition language \(RDL\)"](#) on page 53.

- 4 If you have defined one or more custodians or custodian groups with Custodian Manager, use the fields in the **Search condition settings** area to specify how to search for them. In each case, you can choose to search email addresses, display names, or both. For custodian groups, you can choose to expand the distribution lists of the groups to include their members in your searches, rather than just the list names and email addresses.

Note: Discovery Accelerator does not expand the distribution lists when you use the Near operator with the attributes Subject, Content, Subject or Content, Author, To, CC, BCC, and Author or Recipients.

The conditions that you enter in the **Search conditions settings** area use the custodian information that is available at the time that you build the search. This information is not updated unless you edit the search again. For example, when you create a search and select the option **Expand distribution list to include members**, the list members at that time are saved with the search. If the membership of the list changes later, these changes are not applied to the search until you edit and save it again.

- 5 Click **Save**, and then click **Apply**.

About the search attributes

[Table 3-2](#) lists all the available attributes. For each attribute, the table shows the operators that you can use with the attribute, and describes its purpose.

Table 3-2 Search attributes

Attribute	Type	Accepted operators	Description
AttachmentsCount	Numeric	= > >= < <=	Use AttachmentsCount to add a condition that is based on the number of email attachments.

Table 3-2 Search attributes (*continued*)

Attribute	Type	Accepted operators	Description
Author	String	CONTAINS ANYOF NOT CONTAINS NOT ANYOF	<p>Use Author to add a condition that is based on the email's sender.</p> <p>Enclose full names in double quotation marks ("). You can also type first names, last names, or middle names individually.</p> <p>Values that correspond to targets (T:), target groups (TG:), custodians (C:), and custodian groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.</p> <p>Identify custodians by their primary attribute values, and custodian groups, targets, and target groups by their display names.</p>
AuthorOr Recipients	String	CONTAINS ANYOF NOT CONTAINS NOT ANYOF	<p>AuthorOrRecipients is a composite attribute that lets you add a condition that is based on senders and recipients in any of the following attributes:</p> <ul style="list-style-type: none"> ■ From ■ To ■ CC ■ BCC <p>Enclose full names in double quotation marks ("). You can also type first names, last names, or middle names individually.</p> <p>Values that correspond to targets (T:), target groups (TG:), custodians (C:), and custodian groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.</p> <p>Identify custodians by their primary attribute values, and custodian groups, targets, and target groups by their display names.</p>

Table 3-2 Search attributes (*continued*)

Attribute	Type	Accepted operators	Description
BCC	String	CONTAINS ANYOF ALLOF NOT CONTAINS NOT ALLOF NOT ANYOF	<p>Use BCC to add a condition that is based on the email's BCC recipients.</p> <p>Enclose full names in double quotation marks ("). You can also type first names, last names, or middle names individually.</p> <p>Values that correspond to targets (T:), target groups (TG:), custodians (C:), and custodian groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.</p> <p>Identify custodians by their primary attribute values, and custodian groups, targets, and target groups by their display names.</p>
CC	String	CONTAINS ANYOF ALLOF NOT CONTAINS NOT ALLOF NOT ANYOF	<p>Use CC to add a condition that is based on the email's CC recipients.</p> <p>Enclose full names in double quotation marks ("). You can also type first names, last names, or middle names individually.</p> <p>Values that correspond to targets (T:), target groups (TG:), custodians (C:), and custodian groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.</p> <p>Identify custodians by their primary attribute values, and custodian groups, targets, and target groups by their display names.</p>

Table 3-2 Search attributes (*continued*)

Attribute	Type	Accepted operators	Description
Content	String	CONTAINS ANYOF ALLOF NEAR NOT CONTAINS NOT ALLOF NOT ANYOF	<p>Use Content to add a condition that is based on a string in the body of the email, or in the file's content.</p> <p>Enclose any phrases in double quotation marks ("). For all the accepted operators except NEAR, you can choose to turn search stemming on or off. Discovery Accelerator does not expand distribution lists when you use the NEAR operator, even if you check the option to do so elsewhere in the rule builder.</p> <p>Values that correspond to targets (T:), target groups (TG:), custodians (C:), and custodian groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.</p> <p>Identify custodians by their primary attribute values, and custodian groups, targets, and target groups by their display names.</p>

Table 3-2 Search attributes (*continued*)

Attribute	Type	Accepted operators	Description
Custom	String	= NOT = CONTAINS ANYOF ALLOF NOT CONTAINS NOT ALLOF NOT ANYOF	<p>Use Custom to add a condition that is based on any custom attributes created during archiving. Enter the name of the custom attribute before you select an operator and enter the search string.</p> <p>For example:</p> <pre>Custom.Veritas.MyAttribute CONTAINS "Veritas"</pre> <p>Enclose phrases in double quotation marks ("). If you select the ANYOF or NOT ANYOF operator, you can separate multiple values with commas.</p> <p>Values that correspond to targets (T:), target groups (TG:), custodians (C:), and custodian groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.</p> <p>Identify custodians by their primary attribute values, and custodian groups, targets, and target groups by their display names.</p>
Direction	List	= ANYOF NOT = NOT ANYOF	<p>Use Direction to add a condition that is based on the direction of the email. Acceptable values are:</p> <ul style="list-style-type: none"> ■ Internal ■ External Inbound ■ External Outbound ■ Not Specified

Table 3-2 Search attributes (*continued*)

Attribute	Type	Accepted operators	Description
FileExtension	String	ANYOF CONTAINS NOT ANYOF NOT CONTAINS	Use FileExtension to add a condition that is based on email extension type and file types. Enter multiple file types as a list. For example: DOC PDF MSG Enclose phrases in double quotation marks ("). If you select the ANYOF or NOT ANYOF operator, you can separate multiple values with commas.
Importance	List	= ANYOF NOT = NOT ANYOF	Use Importance to add a condition that is based on the email's importance setting. Acceptable values are: <ul style="list-style-type: none">■ Low■ Normal■ High
MailDate	Date	= > >= < <= BETWEEN NOT BETWEEN	Use MailDate to add a condition that is based on the date the email was sent, and on the modified date of email's attachments. When you use the BETWEEN and the NOT BETWEEN operators, you must specify start and end dates.
MessageClass	String	ANYOF CONTAINS NOT ANYOF NOT CONTAINS	Use MessageClass to add a condition that is based on the email's MAPI message class setting. For example: IPM.Note. Enclose phrases in double quotation marks ("). If you select the ANYOF or NOT ANYOF operator, you can separate multiple values with commas.

Table 3-2 Search attributes (*continued*)

Attribute	Type	Accepted operators	Description
MessageType	List	= ANYOF NOT = NOT ANYOF	Use MessageType to add a condition that is based on the email's type. Acceptable values are: <ul style="list-style-type: none"> ■ Bloomberg ■ Domino Mail ■ Exchange Mail ■ Fax ■ File ■ Instant Messaging ■ SharePoint ■ SMTP Mail ■ Social
ModifiedDate	Date	= > >= < <= BETWEEN NOT BETWEEN	Use to ModifiedDate to add a condition that is based on the date the email or file was last modified. When you use the BETWEEN and the NOT BETWEEN operators, you must specify start and end dates.
OriginalLocation	String	ANYOF CONTAINS NOT ANYOF NOT CONTAINS	Use OriginalLocation to add a condition that is based on the original location of the email or file. For example: <ul style="list-style-type: none"> ■ Inbox ■ Sent items ■ \\server\share\Sales Enclose phrases in double quotation marks (""). If you select the ANYOF or NOT ANYOF operator, you can separate multiple values with commas.

Table 3-2 Search attributes (*continued*)

Attribute	Type	Accepted operators	Description
Recipients	String	CONTAINS ANYOF NOT CONTAINS NOT ANYOF	<p>Recipients is a composite attribute that lets you add a condition that is based on recipients in any of the following attributes:</p> <ul style="list-style-type: none"> ■ To ■ CC ■ BCC <p>Values that correspond to targets (T:), target groups (TG:), custodians (C:), and custodian groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.</p>
RetentionCategory DisplayName	String	CONTAINS NOT CONTAINS	<p>Use RetentionCategoryDisplayName to add a condition that is based on the retention categories under which the item was archived. For example:</p> <p>General retention category</p>
RetentionExpiry Date	Date	= > >= < <= BETWEEN NOT BETWEEN	<p>Use RetentionExpiryDate to add a condition that is based on the date the email or file is due to expire. The retention category under which the item was archived determines the expiry date.</p> <p>When you use the BETWEEN and the NOT BETWEEN operators, you must specify start and end dates.</p>
Sensitivity	List	= ANYOF NOT =	<p>Use Sensitivity to add a condition that is based on the sensitivity of the email. Acceptable values are:</p> <ul style="list-style-type: none"> ■ Normal ■ Personal ■ Private ■ Confidential

Table 3-2 Search attributes (*continued*)

Attribute	Type	Accepted operators	Description
Size	Numeric	= > >= < <=	Use Size to add a condition that is based on the size of the email or file.
Subject	String	CONTAINS ALLOF ANYOF NEAR NOT CONTAINS NOT ALLOF NOT ANYOF	<p>Use Subject to add a condition that is based on strings in the email's subject, and in file names.</p> <p>Enclose any phrases in double quotation marks ("). For all the accepted operators except NEAR, you can choose to turn search stemming on or off. Discovery Accelerator does not expand distribution lists when you use the NEAR operator, even if you check the option to do so elsewhere in the rule builder.</p> <p>Values that correspond to targets (T:), target groups (TG:), custodians (C:), and custodian groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.</p> <p>Identify custodians by their primary attribute values, and custodian groups, targets, and target groups by their display names.</p>

Table 3-2 Search attributes (*continued*)

Attribute	Type	Accepted operators	Description
SubjectOrContent	String	CONTAINS ALLOF ANYOF NEAR NOT CONTAINS NOT ALLOF NOT ANYOF	<p>SubjectOrContent is a composite attribute that lets you add a condition that is based on strings in either of the following attributes:</p> <ul style="list-style-type: none"> ■ Subject ■ Body <p>This attribute is also used to match using strings in a file's name or content.</p> <p>Enclose any phrases in double quotation marks ("). For all the accepted operators except NEAR, you can choose to turn search stemming on or off. Discovery Accelerator does not expand distribution lists when you use the NEAR operator, even if you check the option to do so elsewhere in the rule builder.</p> <p>Values that correspond to targets (T:), target groups (TG:), custodians (C:), and custodian groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.</p> <p>Identify custodians by their primary attribute values, and custodian groups, targets, and target groups by their display names.</p>

Table 3-2 Search attributes (*continued*)

Attribute	Type	Accepted operators	Description
To	String	CONTAINS ANYOF ALLOF NOT CONTAINS NOT ALLOF NOT ANYOF	<p>Use To to add a condition that is based on the email's recipients.</p> <p>Enclose full names in double quotation marks ("). You can also type first names, last names, or middle names individually.</p> <p>Values that correspond to targets (T:), target groups (TG:), custodians (C:), and custodian groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.</p> <p>Identify custodians by their primary attribute values, and custodian groups, targets, and target groups by their display names.</p>

About the operators

The operators fall into the following categories:

- Single-value operators, which accept one search value only
- Multiple-value operators, which accept several search values

[Table 3-3](#) lists all the single-value operators that are available.

Table 3-3 Single-value operators

Operator	Description
=, NOT =	<p>Use for numbers, dates, and lists. For example:</p> <p><code>AttachmentsCount = 2</code></p>
<, <=, >, >=	Use for numbers and dates.

Table 3-3 Single-value operators (*continued*)

Operator	Description
CONTAINS, NOT CONTAINS	<p>Use for strings. Wildcards are allowed in the search values.</p> <p>Example 1:</p> <p>Subject CONTAINS 'james'</p> <p>This search matches all the items that contain the exact word "james" in the subject.</p> <p>Example 2:</p> <p>Subject CONTAINS 'james*'</p> <p>This search matches both "A quick hello from James" and "A quick hello from Jamestown".</p> <p>You cannot use a wildcard character at the start of a search string.</p>

[Table 3-4](#) lists all the multiple-value operators that are available.

Table 3-4 Multiple-value operators

Operator	Description
ALLOF, NOT ALLOF	<p>Use for strings.</p> <p>Searches match items that contain (or do not contain) all the values you supply. For example:</p> <p>CC ALLOF 'bill@example.com ted@example.com'</p> <p>This search matches only items that contain both addresses in the CC field.</p> <p>Wildcards are supported.</p>
ANYOF, NOT ANYOF	<p>Use for strings.</p> <p>Searches match items that contain (or do not contain) any of the values you supply. For example:</p> <p>CC ANYOF 'bill@example.com ted@example.com'</p> <p>This search matches items that contain one of the addresses, or both addresses in the CC field.</p> <p>Wildcards are supported.</p>

Table 3-4 Multiple-value operators (*continued*)

Operator	Description
BETWEEN, NOT BETWEEN	<p>Use for dates. For example:</p> <pre>MailDate BETWEEN "01/05/2010", "31/05/2010"</pre> <p>You must place the earlier date before the later date.</p>
NEAR	<p>Use for strings.</p> <p>Searches match items where the words that you specify are within 50 words of each other. For example:</p> <pre>Content NEAR 'contract money'</pre> <p>This search matches items where the words "contract" and "money" are fewer than 50 words apart in the body text.</p> <p>See "Guidelines on using the NEAR operator condition in Discovery Accelerator rules" on page 52.</p>

The syntax for searches that contain multiple-value operators is, for example:

```
attribute operator 'value1  
"John Doe"  
value3  
T:Jane Smith'
```

Each custodian or target value must be on a separate line.

Guidelines on using the NEAR operator condition in Discovery Accelerator rules

There are a number of guidelines that you must observe when you use the NEAR operator condition in a rule.

- You must specify more than one value as input for the NEAR operator condition.
- If you combine a condition that uses a NEAR operator with one or more other conditions, you can join the NEAR operator condition to the preceding and following conditions with an AND logical operator only—not an OR operator. For example, consider the following rule:

```
Subject contains 'Veritas'  
AND  
Content Near 'Veritas Investment'  
AND  
MailDate = '17/03/2010'
```

```
OR  
Importance = 'Normal'
```

You cannot insert an OR operator between the Subject and Content conditions, or between the Content and MailDate conditions. However, it is acceptable to insert an OR condition between the MailDate and Importance conditions.

- When a rule contains multiple NEAR operator conditions, they must all use the same search attribute (Subject, Content, or SubjectOrContent). For example, in a rule that contains two NEAR operator conditions, you cannot set the attribute of one condition to Subject and the other to Content.
- You cannot insert brackets in a rule condition that uses a NEAR operator.
- When a rule contains multiple NEAR operator conditions, and the search values that you specify are in different languages, the language of the first NEAR operator condition determines the language in which Discovery Accelerator conducts all the searches in the rule.

About SQL Server stopwords

To prevent a full-text index from becoming bloated, SQL Server has a mechanism that discards commonly occurring words such as "the" and "and". These discarded words are called *stopwords*. During index creation, the SQL full-text engine omits stopwords from the full-text index, and consequently you cannot search for them by using Discovery Accelerator. For example, a search for the phrase "the lazy dog" returns results where the phrase "one lazy dog" matches.

You can override this behavior by editing the SQL Server stopwords file. The following article in the Microsoft Knowledge Base describe how to do this:

<https://msdn.microsoft.com/library/ms142551.aspx>

Note that the stopwords are common to all full-text catalogs in the SQL instance.

Manually editing queries in analytics rule definition language (RDL)

The rules that you build in the **Rule conditions** area of the **Rule Builder** tab are displayed in the analytics rule definition language (RDL) in the **Rule query** area. When you become familiar with the syntax of rule definition language, you can directly edit the queries. This lets you create rules that are not possible in the visual rule builder.

Note: When you have manually edited a query and saved it, you can no longer use the visual query builder to edit the same rule.

Using parentheses to set Boolean precedence in analytics RDL

You can use parentheses to set Boolean precedence in your rules. Consider a case in which you want to mark or tag the items that match these conditions:

- The sender is John Doe or the recipient is Jane Smith.
- The email subject must contain the word Veritas.

To match these items, one user might use the visual rule builder to construct the following rule:

```
Author CONTAINS '"John Doe"'
OR
To CONTAINS '"Jane Smith"'
AND
Subject CONTAINS 'Secret'
```

However, another user might construct the rule differently, and produce this result:

```
To CONTAINS '"Jane Smith"'
AND
Subject CONTAINS 'Secret'
OR
Author CONTAINS '"John Doe"'
```

In both cases, it is unclear what results are produced when the rule engine processes the rules. To ensure that your rules produce the results that you want, write them directly in RDL and use parentheses to group the conditions that belong together. The parentheses ensure that related conditions are evaluated as you intend, and it is clear what your intentions are. For example:

```
(
  Author CONTAINS '"John Doe"'
  OR
  To CONTAINS '"Jane Smith"'
)
AND
Subject CONTAINS 'Secret'
```

Using stemming in analytics RDL

You can use stemming when you search the Subject, Content or SubjectOrContent attributes. Use the following syntax:

```
attribute {STEM} operator value
```

Note: You cannot use wildcard characters in rule conditions that use stemming.

Any phrase values that you add to your searches should be enclosed in double quotation marks. For example:

```
subject contains "the purchase order"
```

In RDL, complex search values must be enclosed in double quotation marks. For example:

```
SubjectOrContent AllOf
'
    "the purchase order"
    Stock Investment
'
```

In this case, the query matches the items that contain "the purchase order", "stock", and "investment" in the subject or body.

Specifying custodian and target values in analytics RDL

[Table 3-5](#) shows the format in which you must specify any custodian values or target values in a manually-edited analytics rule.

Table 3-5 How to specify custodian values and target values in analytics RDL

Item	What to type	Example
Custodian	<i>C:ID:primary_attribute_value</i>	C:11:E12345
Custodian group	<i>CG:ID:display_name</i>	CG:3:Employees-ALL
Target	<i>T:ID:display_name</i>	T:4:Jane Smith
Target group	<i>TG:ID:display_name</i>	TG:23:VIP - Executives

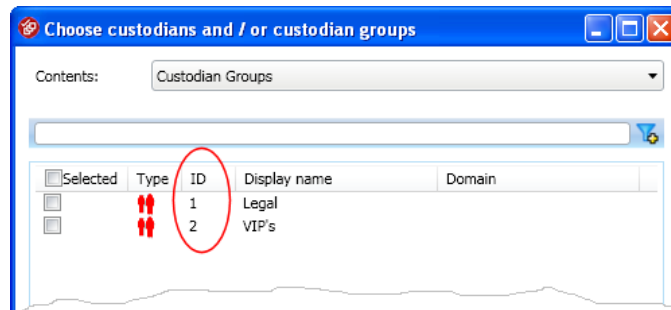
When the primary attribute value for a custodian contains an apostrophe, you must precede the apostrophe with a backslash (\). For example, if the primary attribute value is "Sean O'Casey", you might add it to an analytics rule like this:

```
Author CONTAINS 'C:8:Sean O\'Casey'
```

After you click **Edit Query** in the **Rule query** area of the **Rule Builder** tab, a **Launch Target Picker** button appears at the right of the area. Click this button to select and enter the required custodian value or target value in the correct format.

Alternatively, you can use this method to obtain the required ID value of the custodian or target, as [Figure 3-2](#) shows.

Figure 3-2 Using the Target Picker to obtain the ID value of a custodian or target



Finding all items in the same conversation

In those cases that are enabled for analytics, Discovery Accelerator analyzes the items in the case as it retrieves the data. Once this analysis is complete, you can easily find all the items that have the same subject line as the current one.

Conversation analysis is based primarily on the subject of the mail items, but also includes other mail attributes that define a conversation. For the purpose of conversation analysis, Discovery Accelerator normalizes mail subjects to remove prefixes that email clients have added. For example, RE:, Re:, Fwd:, and Antwort: are removed. After normalization, messages must have identical subjects for Discovery Accelerator to consider them part of the same conversation.

For any messages that Outlook 2003 or later has generated, conversation analysis can also construct a conversation hierarchy. Items from Outlook clients earlier than Outlook 2003 are grouped in a flat list.

Conversation analysis may find many conversations with a frequently used email subject such as "Hello". In this case, the Conversation window shows all the results from multiple conversations, each with its own top-level item in the hierarchy. The conversation can display up to 1,000 top-level items in the hierarchy.

To find all items in the same conversation

- 1 In the **Review** pane, select an item for which you want to find all the related items.

- 2 Right-click the item, and then click **View conversation**.

Discovery Accelerator lists the related items in a separate Conversation window. This window sorts the items by sender or date and, where possible, by their place in the item hierarchy. Unreviewed items are shown in bold.

Note: The **Conversation** window may not show all the items in a conversation until the retrieval of analytics data is complete for the case or folder. Even when the retrieval of analytics data is complete, Discovery Accelerator does not include in the results of conversation analysis any items for which it failed to retrieve such data.

- 3 Use the facilities in the **Conversation** window to process the items. For example, you can apply marks and tags to the items, display printable versions, and download or copy them.

Assigning review marks and tags to items

As part of the review process, you assign a status mark to each message to indicate that you have reviewed it and have no concerns—or conversely, that you do have some concerns, and therefore want to question the message.

As well as assigning marks to items, or as an alternative to assigning marks, you can assign *tags* to the items. Tags differ from marks in two ways:

- You can assign multiple tags to an item, but you can assign one mark only.
- Assigning a tag to an item does not change its action status. This status only changes when you click one of the primary mark buttons, such as Relevant or Flagged.

In cases that are enabled for analytics, items may have been marked or tagged by analytics rules. You can use the Review pane to accept the automatic categorization on these items.

Tips:

- In the item list, the headers of unreviewed items display in bold text.
- You can quickly mark all the items that match a certain filter option by right-clicking that option in the left pane and then selecting the required mark.

- If you right-click an item in the list view, you can access additional commands for bulk-marking the items in the review set.

To assign a review mark or tag to an item

- 1 In the Review pane, select the items that you want to mark.

To select multiple adjacent items, click the first item, and then hold down the Shift key and click the last item. To select nonadjacent items, click the first item, and then hold down the Ctrl key and click additional items. To select all the items, press Ctrl+A.

- 2 Do one or more of the following:

- To apply a mark to the items, click the appropriate button at the bottom right of the pane.
After a few moments, Discovery Accelerator changes the status of the items accordingly.
- To assign tags to the items, click the **Tags** button below the Reading pane, and then select the required values.
- To accept the marks and tags that analytics rules have applied to the items in this case, click the **Accept** button.

Adding comments to items

As well as assigning a review mark to an item, you can add a comment to it.

To add a comment to an item

- 1 In the Review pane, select one or more items to which you want to add a comment.
- 2 In the **Comment** box at the bottom of the pane, type a new comment.
- 3 Click the button at the right of the **Comment** box.

Discovery Accelerator displays a comment indicator in the **Comment present** column of the item list to show that you have added the comment.

Click the **Comments** tab at the bottom of the Reading pane to view the comments assigned to an item. You can also customize the item list columns to add a column that shows the comments on items.

Viewing the history of items

Discovery Accelerator provides ready access to historical information on a selected item, such as the dates and times at which the reviewers assigned marks and comments to it.

To view the history of an item

- 1 In the Review pane, select the item whose history you want to view.
- 2 Click the **History** tab at the bottom of the Reading pane.

Discovery Accelerator displays the following details:

- The subject, date, and details of the sender and recipients.
- The item type, such as Microsoft Exchange or Bloomberg, and its direction (Internal, ExternalInbound, or ExternalOutbound).
- The case in which Discovery Accelerator captured the item.
- When and how Discovery Accelerator captured the item.
- The ID of the item within Discovery Accelerator.
- The original location from which the item was archived.
- The action status history of the item. This history identifies the reviewers who displayed a preview or printable version of the item, downloaded the original version of the item, or marked it, and the date and time at which they did so. If you are viewing the history of an item that you have copied from the review set to a research folder, any events in the status history list that are colored blue took place before you copied the item to the folder.
- Any policy and policy action with which your policy management software has tagged the item.
- For an SMTP item, any attribute information that Enterprise Vault has added to its X-Headers.

Displaying printable versions of items

You can display the contents of items in a form that is suitable for printing.

To display a printable version of an item

- 1 In the Review pane, select the item that you want to print.
- 2 Click the **Printable** tab at the bottom of the Reading pane.
 Discovery Accelerator displays a printable version of the item.
- 3 Click the **Print** button at the top of the Reading pane to send the item for printing.

Downloading the original versions of items

As well as viewing an HTML rendering of an item, you can download it in its original form to your computer. Note that downloaded items do not include any audit information, such as the comments that reviewers have assigned to them. If you want to obtain both an item and its audit information, you must export it from Discovery Accelerator.

To download the original version of an item

- ◆ In the Review pane, do one of the following:
 - Click the item that you want to download and then click the **View original item** button above the Reading pane.
 - Right-click the item and then click **View original**.

Discovery Accelerator downloads the item to your computer and displays it using the appropriate application.

Copying the item list to the Clipboard

You can copy one or all of the rows in the item list to the Windows Clipboard, and then paste them into a spreadsheet application like Microsoft Excel. The copied information includes additional information that Discovery Accelerator does not display in the list, such as the Enterprise Vault saveset identity of each item. Regardless of whether you have chosen to hide some of the columns in the item list, all the information is copied.

To copy the item list to the Clipboard

- 1 In the Review pane, do one of the following:
 - To copy a single row in the item list, right-click it and then click **Copy items details to clipboard**.

- To copy all the rows, first press Ctrl+A to select them all. Then right-click and click **Copy items details to clipboard**.
- 2 Open the application in which you want to paste the information.
 - 3 Paste the information in the normal way.

Changing how the Review pane looks

You can customize the appearance of the Review pane to suit the way you work and help you find items quickly.

Table 3-6 How to customize the Review pane

To do this	Do this
Expand the Review pane to occupy the available space	Click the Expand Reviewing Screen button above the item list.
Change the position of the Reading pane.	Click View above the item list, and then point to Reading Pane Layout and select the required position. You can position the Reading pane at the bottom or right of the main window, or detach it from the main window and display its contents in a new window.
Change the size of the text in the Reading pane.	Click View above the item list, and then point to Size of Reading Pane Text and select the required size.
Hide or show columns in the item list.	Right-click any column heading in the item list and then point to Select columns and select the columns to hide or show. Then click Apply changes .
Sort the items in the item list.	Click a column heading in the item list to sort the items by the entries in the column. The direction of the arrow in the column heading indicates whether the entries are sorted in ascending or descending order.
Group the items by date, author, subject, or policy action.	Select the required option in the Group box above the item list. Display or hide the items in a group by clicking the arrow at the left of the group.

Table 3-6 How to customize the Review pane *(continued)*

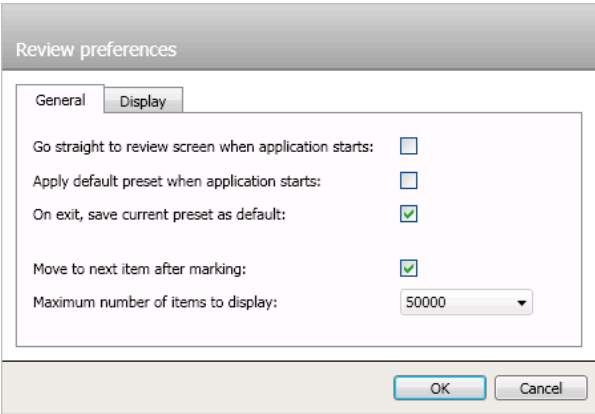
To do this	Do this
Specify the maximum number of items to display per page.	In the Page Size box below the item list, select the required number of items.

Setting your Review pane preferences

Discovery Accelerator provides extensive facilities with which you can customize the appearance and operation of the Review pane.

To set your Review pane preferences

- 1
- Click the **Review Preferences** button in the header area of the Review pane.
The Review preferences dialog box appears.



- 2
- Select your required options on the **General** tab. The options are as follows:

Go straight to review screen when application starts	When selected, lets you proceed directly to the Review pane when you start Discovery Accelerator.
Apply default preset when application starts	When selected, applies the default filter options to the items in the item list.
On exit, save current presets as default	When selected, saves the current filter options as the default options for the Review pane.
Move to next item after marking	When selected, causes Discovery Accelerator to display the next item in the list automatically when you mark an item.

Maximum number of items to display	Sets a limit on the number of items that you can display in the Review pane.
------------------------------------	--

3 Select your required options on the **Display** tab. The options are as follows:

Font	Sets the font to use for all buttons and labels in the Review pane.
Item list font	Sets the font to use in the item list.
Reading pane font	Sets the font to use in the Reading pane.
Item list display type	<p>Specifies whether Discovery Accelerator displays the items in the list in a single-line layout or multiline layout. The multiline layout displays item information over two lines. The first line displays the sender, and the second line displays the text from the Subject box of the item header.</p> <p>If you select Automatic, Discovery Accelerator automatically switches to the multiline layout when there is insufficient screen space to display a header in a single line.</p>
Highlight search terms in reading pane	Turns on or off highlighting for search terms.
Use pop-up for text input	Determines what happens when you type characters in the text input boxes in the Review pane, such as the Comment box. When this option is checked, Discovery Accelerator displays the characters in a separate pop-up window as you type them. This lets you view all the characters at once, instead of hiding older characters as you type new ones.
Hide text on action buttons	When selected, removes the text labels from the action buttons that are below the Preview pane.
Show original location in reading pane	When selected, provides additional information above the Preview pane on the location from which the current item was archived.

4 Click **OK**.

Working with research folders

This chapter includes the following topics:

- [About research folders](#)
- [Creating research folders](#)
- [Reviewing the items in research folders](#)
- [Exporting items from research folders](#)
- [Giving other users access to your research folders](#)
- [Copying items to research folders](#)
- [Converting research folders into cases](#)

About research folders

By creating one or more research folders, you can work privately on the items that interest you without generating additional work for other reviewers. For example, suppose that you are pursuing an alleged instance of insider trading. Rather than add a large number of search results to the review set, where they are visible to other reviewers, you can conduct the searches from a research folder and store the results there. Then you can review and mark the items in the normal way, or export them for offline review.

Research folders provide almost the same functionality as cases. Like cases, you can enable analytics on a folder. However, unlike cases, folders cannot place items on legal hold. In addition, only application-wide marks and tags are available for selection when you mark the items in a folder.

Where necessary, you can give other users access to your research folders so that they can collaborate in the review process. The permissions that you grant these users determine whether they can export items from the folder, search for more items to add to it, and review and mark the items.

Creating research folders

Discovery Accelerator provides several methods for creating folders. In addition to the method described below, you can also create new folders when you define the criteria for searches, accept the search results, and review items.

You must have the Create Research Folder permission to create a folder that is not attached to any case. By default, this permission is not associated with any role.

To create a research folder

- 1 Click the **Research** tab in the Discovery Accelerator client.
- 2 In the left pane, click **All Research**.
- 3 Click **New** at the top of the window.

The folder properties pane appears.

The screenshot shows the 'Folder' properties pane in the Discovery Accelerator client. The pane has a title bar with buttons for 'Delete', 'Promote to Case', 'Enable Analytics', 'Disable Analytics', and 'Go To Review'. The main content area is divided into three sections: 'Folder', 'Production details', and 'Search details'. In the 'Folder' section, the 'Name' field contains 'A Sample Folder' and the 'Parent' dropdown menu is set to '<My Research>'. In the 'Production details' section, the 'Output folder' field contains 'C:\'. In the 'Search details' section, the 'Searchable Vault Stores' list includes 'Demo Site', 'Exchange Vault Store', 'File Vault Store', 'Domino Vault Store', and 'SharePoint Vault Store'. At the bottom right, there are 'Save' and 'Cancel' buttons.

- 4 In the **Name** box, type a name for the folder.

- 5 In the **Case** box, select the case with which to associate the folder. You must have the Perform Ad Hoc Searches permission in this case.

Alternatively, select <My Research> to create a folder that is not attached to any case.
- 6 Specify a location in which you want to store any items that you export from the folder.
- 7 If you have chosen to create a folder that is not attached to any case, select the vault stores in which to search for items. Check or uncheck the box next to each vault store to include it in searches or exclude it from searches.
- 8 Click **Save**.

Reviewing the items in research folders

You review the items in a folder in exactly the same way that you review the items in the review set.

You must have the Review permission in the folder to review the items in it. By default, users with the Folder Full Control or Folder Review role have this permission.

To review the items in a research folder

- 1 Click the **Research** tab in the Discovery Accelerator client.
- 2 In the left pane, click the folder whose items you want to review.
- 3 Click the **Properties** tab.
- 4 Click **Go To Review**.
- 5 In the Review pane, review the items as you normally would do.

See [“About the Review pane”](#) on page 27.

Exporting items from research folders

If you want to review items offline or present them in evidence to a third party, you must export them. You can export the items in several different formats, including PST, Domino NSF database, HTML, MSG, and ZIP. If you export to HTML, you can export review marking information along with each item.

Exporting does not affect the status of items, and you can continue to work on those that you have exported.

You must have the Export Research Items permission to export items from a folder that is not linked to a case. When the folder is linked to a case, you must have the Production permission in the folder to export items from it.

To export the items from a research folder

- 1 Click the **Research** tab in the Discovery Accelerator client.
- 2 In the left pane, click the folder from which you want to export some items.
- 3 Click the **Export** tab.
- 4 Click **New**.
- 5 Enter the required run details and filter information.

Discovery Accelerator exports items to a folder on the Discovery Accelerator server rather than to a folder on the computer where you are running the client. If you use the same output folder and export run name for multiple runs, Discovery Accelerator overwrites the report summary each time. It is therefore advisable to give each run a different name.

The output folder path can contain up to 100 characters.

- 6 Click **Apply**.
- 7 Click **OK** to export the specified number of items.
- 8 Wait a few moments for processing to finish, and then browse to the output folder on the Discovery Accelerator server to retrieve the exported items.

Giving other users access to your research folders

You can give other users access to your folders by assigning roles to them. For example, anyone who wants to review and mark the items in a folder must have the Review role in that folder. Other roles permit users to export items from the folder and search for new items to add to it. The Full Control role combines all these permissions in one role.

You must have the Role Assignment permission in the folder to give other users access to it. By default, users with the Folder Full Control role have this permission.

To give another user access to a research folder

- 1 Click the **Research** tab in the Discovery Accelerator client.
- 2 In the left pane, click the folder to which you want to give access.
- 3 Click the **Role Assignment** tab.
- 4 Click the name of the user to whom you want to assign a role.

If the user does not appear in the list, click **Add** at the top of the pane and then select the user to add to it.

- 5 In the right pane, do one of the following:
 - Click **Add** to assign a new role.
 - Click **Remove** to remove the selected role.
- 6 Click **Save**.

Copying items to research folders

You can copy items from the review set to a personal folder for further research. You can then review and mark the items, export them for offline review, search for more items that are related to the copied ones, and more.

You must have the Perform Ad Hoc Searches permission in the case to copy items from its review set to your folder. By default, users with the case role of Admin have this permission.

To copy an item to a research folder

- 1 In the Review pane, select one or more items that you want to copy to a folder.

To select multiple adjacent items, click the first item, and then hold down the Shift key and click the last item. To select nonadjacent items, click the first item, and then hold down the Ctrl key and click additional items. To select all the items, press Ctrl+A.
- 2 Click **Copy** below the preview pane.
- 3 Select the destination folder to which you want to copy the items.
- 4 Choose to copy the selected items only or all the items in the review set.
- 5 Click **Copy**.

Converting research folders into cases

If you determine that the information in a research folder warrants a case, you can convert the folder into one. This process automatically places all the items in the folder on legal hold.

The newly created case complies with the U.S. government's Federal Information Processing Standards (FIPS) for encoding and encrypting data, if you used Discovery Accelerator 10.0.1 or later to make the source research folder. However, if you make a folder with an older and non-FIPS-compliant version of Discovery Accelerator and then convert it into a case with Discovery Accelerator 10.0.1 or later, the case is not FIPS-compliant.

You must have the Promote Research To Case permission to convert a folder into a case. By default, only users with the role of Discovery System Admin have this permission.

To convert a research folder into a case

- 1** Click the **Research** tab in the Discovery Accelerator client.
- 2** In the left pane, click the folder that you want to convert into a case.
- 3** Click the **Properties** tab.
- 4** Click **Promote to Case**.
- 5** Click **Promote to Case** to confirm that you want to proceed.

Exporting and producing items

This chapter includes the following topics:

- [How exporting differs from producing](#)
- [Performing an export or production run](#)
- [About the limits on the number of simultaneous export and production runs](#)
- [Making the export IDs or Bates numbers visible in Microsoft Outlook](#)

How exporting differs from producing

Exporting items is different from producing items in the following ways:

- Discovery Accelerator locks produced items, but it does not lock exported items.
- After you have exported an item, you can change the mark or status that you have assigned to it. However, after you have produced an item, you cannot mark it or change its status (but you can still display it in the Review pane). If the same item has been captured in another case, its status in that case remains unaffected.
- You can export individual items multiple times, but you can produce items once only.

In effect, the export feature provides a less formal way to copy items out of Discovery Accelerator for offline review.

You do not have to wait until the end of the reviewing process to carry out production; you can produce the items that you have reviewed at any time. You can then carry out productions of further items later, after they have been reviewed. If you use the

same output folder and production run name for multiple runs, Discovery Accelerator overwrites the report summary each time.

If you carry out a production run and then something goes wrong with the files that you have produced—for example, they are accidentally deleted—you can reproduce the items. However, once you have successfully produced items, you cannot undo the process.

Performing an export or production run

If you want to review items offline or present them in evidence to a third party, you must export them from Discovery Accelerator. There are several output formats from which to choose, including PST, Domino NSF database, HTML, MSG, and ZIP. Export to HTML if you want to export both the item itself and its action status history. This history identifies the reviewers who displayed a preview or printable version of the item, downloaded the original version of the item, or marked it, and the date and time at which they did so.

As well as exporting the selected items, Discovery Accelerator also outputs some reports in HTML, plain-text, and XML formats. All three reports list the items that you have exported, and the HTML report provides hyperlinks to the items.

You must have the Production permission to produce or export items.

To perform an export or production run

- 1 Click the **Cases** tab in the Discovery Accelerator client.
- 2 In the left pane, click the case from which you want to export items.

If Discovery Accelerator lists a lot of cases, you can filter the list with the fields at the top of the pane. As well as filtering the cases by name, you can choose whether to list any research folders that are associated with them.
- 3 Click the **Export/Production** tab.
- 4 Click **New** at the top of the window.

The Export Details pane appears.

Export Details

Name:

Output folder:

Type: ☐ Production ☒ Export

Items Selection

Item ID:

Original source:

<input checked="" type="checkbox"/> Microsoft Exchange	<input checked="" type="checkbox"/> Instant Messaging	<input type="checkbox"/> SMTP
<input type="checkbox"/> Domino	<input type="checkbox"/> Bloomberg	<input type="checkbox"/> Unspecified/Pre v.6
<input type="checkbox"/> File system	<input type="checkbox"/> Fax	<input type="checkbox"/> Sharepoint
<input type="checkbox"/> IMAP (Internet Mail)	<input type="checkbox"/> Social	

Policy Action:

<input checked="" type="checkbox"/> Include	<input checked="" type="checkbox"/> Exclude	<input checked="" type="checkbox"/> No Action	<input checked="" type="checkbox"/> Not Specified
---	---	---	---

Items:

Search:

Mark:

Last Marked by:

Current Status:

Policy:

- 5 In the **Name** box, type a name for the run.
 The name that you specify here becomes the name of the subfolder in which Discovery Accelerator stores the output from the run.
- 6 In the **Output folder** box, type the path to the folder on the Discovery Accelerator server in which you want to store the output from the run.
 The folder path can contain up to 100 characters.
 Discovery Accelerator places the output from the run in a subfolder of the nominated folder.
- 7 Choose whether to produce or export the selected items.
 If you select **Production**, a Production Details box appears in which you can set the ID prefix and starting sequence number for the production. You may have set this when you created the case, but you can change it here. The prefix can contain up to 10 characters, but it cannot include space characters or symbols such as \ / * ? | < and >.
- 8 In the **Items Selection** box, choose the items that you want to export.
 The options are as follows:

Item ID	Specifies the ID of an individual item that you want to export. To determine the ID of an item, view the item in the Review pane.
Original source	Selects items by their type, such as Microsoft Exchange or Domino.
Policy action	Selects items by the policy action with which your policy management software has tagged them. This action can be one of the following: Inclusion (demands or suggests capture), Exclusion (precludes capture or advocates non-capture), and No Action (the item is subject to normal random sampling).
Items	Specifies whether to export all the items in the review set or only those items that are assigned to you.
Search	Selects items that the specified search has captured.
Mark	Selects items by the mark that reviewers have assigned to them.
Last marked by	Selects items by the person who last assigned a review mark to them.
Current status	Selects items by their status, such as Pending, Questioned, or Reviewed.
Policy	Selects items by the specific policy with which your policy management software has tagged them.

- 9** In the **Options** box, check **Exclude duplicate items** or **Exclude similar items**, if required. Discovery Accelerator considers items to be duplicates when they have exactly the same content. The items that Discovery Accelerator considers to be similar have the same metadata properties, such as their author display names, subjects, and number of attachments.

The option to exclude duplicate items is available only in cases that you have enabled for analytics. The option to exclude similar items is available only in cases that you have not enabled for analytics.

For more information on the deduplication features in Discovery Accelerator, see the *Accelerator Deduplication* white paper. This is available from the following page of the Veritas Support website:

<http://www.veritas.com/docs/000002529>

- 10** Check **Include journal recipients in reports** if you want the export reports to include recipient information from the journal envelope (P1) of Exchange or

SMTP journal items. This lists all the recipients of each item, regardless of their placement in the To, CC and BCC fields.

Discovery Accelerator does not include recipient information from Domino journal items.

- 11 Choose whether to export the items in their original format, as HTML, or collected in a ZIP file.
 - If you click **Original Type**, you can choose to output Microsoft Exchange items as individual MSG files and SMTP items as individual EML files, or encapsulate them all in a single Personal Folders (.pst) file.

If you click **PST**, Discovery Accelerator displays some additional options with which you can set a password and a maximum roll-over size for the file. The password can contain alphanumeric characters only. The default size of each PST file is 600 MB, and it cannot exceed 20 GB.
 - If you click **HTML**, Discovery Accelerator displays some additional options with which you can choose to include comments and action status history. This history identifies the reviewers who displayed a preview or printable version of each item, downloaded the original version of the item, or marked it, and the date and time at which they did so.
 - If you click **Zip**, you can set a maximum roll-over size for each ZIP file. The default is 1024 MB (1 GB).

You can export all types of items to a ZIP file. However, if you choose to export Domino items, Discovery Accelerator collects them first into a Domino NSF database and then adds this to the ZIP file.
- 12 In the **Number of items to export** box, type the required number of items. Note that Discovery Accelerator exports the oldest items. For example, if you choose to export 100 items, Discovery Accelerator exports the 100 oldest items that match the selected options.

If you have chosen to exclude duplicate items or similar items, they do not count towards the number of exported items. Discovery Accelerator exports the specified number of unique items only.
- 13 If you are exporting file system items or Domino items and want to make them read-only so that they cannot be changed or accidentally deleted, check **Read Only**.
- 14 Click **Apply**.
- 15 When the run has finished, open the output folder on the Discovery Accelerator server to retrieve the exported items. This folder also includes the reports that list the items that you have exported.

About the limits on the number of simultaneous export and production runs

By default, you can undertake up to four runs simultaneously. When you try to perform additional runs, Discovery Accelerator holds them in a queue until it has completed some of the active runs. Then it undertakes the additional runs in the order in which you initiated them. If you need to perform a high-priority run while the maximum number of runs is already in progress, you can ask a Discovery Accelerator administrator to stop one of those runs so that yours can start.

Discovery Accelerator administrators can change the maximum number of simultaneous runs that it is possible to undertake by setting the following **Export/production** configuration options:

- Number of production threads per production run
- Total number of production threads per customer

To access these configuration options, click the **Configuration** tab in the Discovery Accelerator client, and then click the **Settings** tab. The maximum number of simultaneous runs that you can undertake is the "Total number of production threads per customer" divided by the "Number of production threads per production run".

Making the export IDs or Bates numbers visible in Microsoft Outlook

When you view exported or produced Personal Folders (.pst) files in Microsoft Outlook, you may find it helpful to see the export ID or Bates number that Discovery Accelerator has assigned to each item. You can do this by adding a custom column to the view in Outlook.

To make the export IDs or Bates numbers visible in Microsoft Outlook

- 1 Open the exported .pst file in Outlook.
- 2 Right-click the column headers in Outlook, and then click **Field Chooser**.
- 3 Click **New**.
- 4 In the **Name** box in the New Field dialog box, type **Bate Number**, and then click **OK**.
- 5 Close the Field Chooser dialog box.
- 6 Right-click the column headers in Outlook, and then click **Customize Current View**.

- 7** Click **Fields** and then, in the **Select available fields from** list, select **User-defined fields**.
- 8** Add the **Bate Number** field to the list of displayed fields, and then click **OK** twice to close the dialog boxes.

Creating and viewing reports

This chapter includes the following topics:

- [About the Discovery Accelerator reports](#)
- [Creating Discovery Accelerator reports](#)
- [Available Discovery Accelerator reports](#)
- [Viewing existing reports](#)
- [Deleting reports](#)
- [About viewing Discovery Accelerator datasets using the OData web service](#)

About the Discovery Accelerator reports

Discovery Accelerator provides extensive facilities for reporting on the details of a case and validating compliance with discovery requests.

Besides printing the reports, you can export them in a number of formats, including XML, comma-separated values (CSV), Acrobat (PDF), web archive (MHTML), Excel, and TIFF.

Creating Discovery Accelerator reports

You must have the View Reports permission to generate a new report. By default, most users with a case role have this permission.

To create a Discovery Accelerator report

- 1 Click the **Reports** tab in the Discovery Accelerator client.
- 2 Click **New** at the top left of the window.
- 3 In the **Type** box, select the type of report that you want to create.
See [“Available Discovery Accelerator reports”](#) on page 78.
In some instances, choosing a report type causes additional boxes to appear so that you can define the scope of the report.
- 4 In the **Name** box, type a unique name that contains up to 50 characters.
- 5 If required, type an optional description that contains up to 250 characters.
- 6 Set any remaining report parameters, and then click **Apply**.
- 7 When Discovery Accelerator has generated the report, double-click the report name in the left pane to view it.

Available Discovery Accelerator reports

[Table 6-1](#) describes the reports that accompany Discovery Accelerator.

Table 6-1 Available Discovery Accelerator reports

This report	Shows
Archive Source report	The Enterprise Vault archives in which you have conducted Discovery Accelerator searches within a selected case. See “Archive Source report” on page 79.
Case History report	Information on a selected Discovery Accelerator case, including the users who have access to the case and the searches, reviews, and production runs that they have conducted. See “Case History report” on page 80.
Export Run Duplicates report	The duplicate items that Discovery Accelerator has found because you chose to enable deduplication when you conducted an export run. See “Export Run Duplicates report” on page 82.
Item Detail report	The items in the selected case. See “Item Detail report” on page 83.

Table 6-1 Available Discovery Accelerator reports (*continued*)

This report	Shows
Legal Holds report	The items in the selected case on which Discovery Accelerator has placed a hold to stop them from being deleted from the Enterprise Vault archives. See “Legal Holds report” on page 84.
Production Run report	The items in each production run and export run for a selected case. See “Production Run report” on page 85.
Production Run Duplicates report	The duplicate items that Discovery Accelerator has found because you chose to enable deduplication when you conducted a production run. See “Production Run Duplicates report” on page 86.
Productions report	The production runs that you have conducted for the selected case. See “Productions report” on page 87.
Searches report	The live and accepted searches in the selected case. See “Searches report” on page 88.
Security report	The users who have access to the selected case, and their associated roles and permissions. See “Security report” on page 90.

Archive Source report

The Archive Source report provides information on the Enterprise Vault archives in which you have conducted Discovery Accelerator searches within a selected case.

This report contains the following fields.

Table 6-2 Fields in the Archive Source report

This field	Shows
Archive ID	The identifier that Enterprise Vault has assigned to the archive.
Archive Name	The name of the Enterprise Vault archive.

Table 6-2 Fields in the Archive Source report (*continued*)

This field	Shows
Vault Store	The vault store in which the archive is located.
Hits In Archive	The number of hits that the search has generated.
Archive Status	Whether or not the archive is available.
Earliest Date in Archive	The earliest date on which the items in the archive were sent and received.
Latest Date in Archive	The latest date on which the items in the archive were sent and received.

Case History report

The Case History report provides information on a selected Discovery Accelerator case, including the users who have access to the case and the searches, reviews, and production runs that they have conducted.

This report contains the following fields.

Table 6-3 Fields in the Case History report

This field	Shows
Cases	
Case Name/Number	The name that the creator of the case has assigned to it, and the identifying number that Discovery Accelerator has assigned to it.
Case Creation Date	The date on which the case was created.
Legal Hold State	Whether the items in the case review set are on hold to stop users from deleting them from their Enterprise Vault archives.
Total Items In Case	The number of items in the case review set.
Items Produced	The number of items that you have produced for offline review.
Role/User Name	The users who have access to this case and their roles within it.
Searches	
Date Run	The date on which a search was run.

Table 6-3 Fields in the Case History report (*continued*)

This field	Shows
Search Name	The name that the creator of the search has assigned to it.
Search ID	The identifying number that Discovery Accelerator has assigned to the search.
# of Archives	The number of archives that Discovery Accelerator has searched.
Search Status	The progress of the search, expressed as a percentage value.
# of Hits	The number of hits that the search has generated.
# of Unique Hits	The number of items that the search has retrieved that no other search in the case has retrieved.
Review	
Items Unreviewed	The number of items in the case review set that reviewers have yet to mark.
Items Reviewed	The number of items in the case review set that reviewers have marked.
Items Questioned	The number of items in the case review set that have a status of Questioned.
Items Pending	The number of items in the case review set that have a status of Pending.
Items Assigned	The number of items in the case review set that are currently assigned to reviewers for marking.
Items Unassigned	The number of items in the case review set that are not currently assigned to reviewers for marking.
Production/Export History	
Date of Production/Export	The date on which the production or export was completed.
Production/Export Name	The name of the production run or export run.
Production/Export ID	The identifying number that Discovery Accelerator has assigned to the production run or export run.
Production/Export Status	The progress of the production run or export run, expressed as a percentage value.

Table 6-3 Fields in the Case History report (*continued*)

This field	Shows
Begin ID/End ID	The identifying numbers of the first and last items in the production run. -1 means None.
Number of Items Produced/Exported	The number of items in the production run. -1 means None.
Search Name	The name of the search with which you selected items for production.
Mark	The name of the review mark with which you selected items for production.
Location	The path to the folder on the file system where you can find the produced or exported items.

Export Run Duplicates report

The Export Run Duplicates report lists duplicate items that Discovery Accelerator has found because you chose to enable deduplication when you conducted an export run.

This report contains the following fields.

Table 6-4 Fields in the Export Run Duplicates report

This field	Shows
DAID	The identifying number that Discovery Accelerator has assigned to the duplicate item.
Duplicate of Exported DAID	The identifying number of the item that this item duplicates.
SSID	The identifier of the saveset (.DVS) file that contains the duplicate item.
Archive ID	The identifier that Enterprise Vault has assigned to the archive in which the duplicate item is stored.
Archive Name	The name of the Enterprise Vault archive.
Location	The location in the user's mailbox from which the item was archived.
Latest Reviewer	The reviewer to whom this duplicate item was assigned.

Table 6-4 Fields in the Export Run Duplicates report (*continued*)

This field	Shows
Latest Comment	The last comment that a reviewer has assigned to the duplicate item.
Mail Date	The date on which the duplicate item was sent.
Author	The author of the duplicate item.
Recipients (truncated)	The recipients of the duplicate item. This may not be a full list because it can contain up to 256 characters only.
Subject	The subject line of the duplicate item.
Searches	The searches that match this duplicate item.

Item Detail report

The Item Detail report provides information on the items in the selected case.

This report contains the following fields.

Table 6-5 Fields in the Item Detail report

This field	Shows
DAID	The identifying number that Discovery Accelerator has assigned to the item.
SSID	The identifier of the saveset (.DVS) file that contains the item.
Archive ID	The identifier that Enterprise Vault has assigned to the archive.
Archive Name	The name of the Enterprise Vault archive.
Sent/Received Date	The date on which the item was sent or received.
Author	The email address of the person who sent the item.
Recipients (truncated)	The recipients of the item. This may not be a full list because it can contain up to 256 characters only.
Subject	The subject line of the item.
Latest Mark	The last mark that a reviewer has assigned to the item.
Latest Comment	The last comment that a reviewer has assigned to the item.

Legal Holds report

The Legal Holds report provides a summary of the items in the selected case on which Discovery Accelerator has placed a hold to stop them from being deleted from the Enterprise Vault archives. The report first shows details of the case and of the searches that you have conducted in it. The report then shows details of the held items in the search results.

This report contains the following fields.

Table 6-6 Fields in the Legal Holds report

This field	Shows
Case	
Total Items	The number of items in the case review set.
Legal Hold State	Whether the items in the case review set are on hold to stop users from deleting them from their Enterprise Vault archives.
Legal Hold Group ID	The ID of the legal hold on the case.
Reason	The reason why the items in the case have been placed on hold.
Legal Hold Status	The progress of the legal hold.
Total Items Held	The number of items that Discovery Accelerator has placed on hold.
Total # of Hold Errors	The number of items that Discovery Accelerator cannot place on hold.
Total # of Items Deleted	The number of items that have been deleted from the Enterprise Vault archives before Discovery Accelerator can place them on hold.
Total Archives with Items Held	The number of archives in which items have been placed on hold.
Searches	
Search ID	The identifying number that Discovery Accelerator has assigned to the search.
Search Name	The name that the creator of the search has assigned to it.
Search Date	The date on which the search was run.
Total Hits	The total number of items that match the search criteria.

Table 6-6 Fields in the Legal Holds report (*continued*)

This field	Shows
Total Unique Items	The number of items that the search has retrieved that no other search in the case has retrieved.
Total Unique Items Held	The number of unique items that Discovery Accelerator has placed on hold.
Total Archives	The number of Enterprise Vault archives that the search has queried.
Archive Details	
Archive ID	The identifier that Enterprise Vault has assigned to the archive.
Archive Name	The name of the Enterprise Vault archive.
Vault Store	The vault store in which the archive is located.
# of Items on Hold	The number of items on hold in the archive.
Earliest Date	The earliest date on which the items on hold were sent and received.
Latest Date	The latest date on which the items on hold were sent and received.

Production Run report

The Production Run report provides information on the items in each production run for a selected case.

This report contains the following fields.

Table 6-7 Fields in the Production Run report

This field	Shows
Bates ID/Export ID	The identifying Bates number or export number of the item.
DAID	The identifying number that Discovery Accelerator has assigned to the item.
SSID	The identifier of the saveset (.DVS) file that contains the item.
Status	How far the production of this item has progressed.

Table 6-7 Fields in the Production Run report (*continued*)

This field	Shows
Archive ID	The identifier that Enterprise Vault has assigned to the archive in which the item is stored.
Archive Name	The name of the Enterprise Vault archive.
Location	The location in the user's mailbox from which the item was archived.
Number of Duplicate or Similar Items	The number of items that Discovery Accelerator excluded from the production run because they are duplicates of or similar to other items.
Latest Reviewer	The reviewer to whom this item was assigned.
Latest Comment	The last comment that a reviewer has assigned to the item.
Mail Date	The date on which the item was sent.
Author	The author of the item.
Recipients (truncated)	The recipients of the item. This may not be a full list because it can contain up to 256 characters only.
Subject	The subject line of the item.
Searches	The searches that match this item.

Production Run Duplicates report

The Production Run Duplicates report lists duplicate items that Discovery Accelerator has found because you chose to enable deduplication when you conducted a production run.

This report contains the following fields.

Table 6-8 Fields in the Production Run Duplicates report

This field	Shows
DAID	The identifying number that Discovery Accelerator has assigned to the duplicate item.
Duplicate of Exported DAID	The identifying number of the item that this item duplicates.
SSID	The identifier of the saveset (.DVS) file that contains the duplicate item.

Table 6-8 Fields in the Production Run Duplicates report (*continued*)

This field	Shows
Archive ID	The identifier that Enterprise Vault has assigned to the archive in which the duplicate item is stored.
Archive Name	The name of the Enterprise Vault archive.
Location	The location in the user's mailbox from which the item was archived.
Latest Reviewer	The reviewer to whom this duplicate item was assigned.
Latest Comment	The last comment that a reviewer has assigned to the duplicate item.
Mail Date	The date on which the duplicate item was sent.
Author	The author of the duplicate item.
Recipients (truncated)	The recipients of the duplicate item. This may not be a full list because it can contain up to 256 characters only.
Subject	The subject line of the duplicate item.
Searches	The searches that match this duplicate item.

Productions report

The Productions report provides information on the production runs that you have conducted for the selected case.

This report contains the following fields.

Table 6-9 Fields in the Productions report

This field	Shows
Date	The date and time at which the production was completed.
Name	The name that the initiator of the production run has assigned to it.
Production ID	The identifying number that Discovery Accelerator has assigned to the production.
Type	Whether this is a production run or export run.

Table 6-9 Fields in the Productions report (*continued*)

This field	Shows
Begin ID/End ID	The identifying numbers of the first and last items in the production. -1 means None.
Number of Items Produced	The number of items in the production run or export run.
Search Name	The name of the search with which you selected the items for production or export.
Mark	The name of the review mark with which you selected the items for production or export.
Exclude Items	The option for excluding duplicate or similar items that you selected when you defined the criteria for the production run or export run.
Number of Duplicate or Similar Items	The number of items in the production run or export run that are duplicates of or similar to other items in the run.
Include Journal Recipients in Reports	Whether you have chosen to include recipient information from the journal envelope of journal items.
Production Location	The path to the folder on the file system where you can find the produced or exported items.

Searches report

The Searches report provides information on the live and accepted searches in the selected case.

This report contains the following fields.

Table 6-10 Fields in the Searches report

This field	Shows
Date	The date and time at which the search was run.
Search Name	The name that the creator of the search has assigned to it. Click the name to display the criteria used for the search.
Search ID	The identifying number that Discovery Accelerator has assigned to the search.
Status	The status of the search, such as Pending Acceptance, In Progress, Accepted, Failed, or Completed.

Table 6-10 Fields in the Searches report (*continued*)

This field	Shows
# of Archives	The number of archives that Discovery Accelerator has searched.
Search Status	The progress of the search, expressed as a percentage value.
# of Hits	The number of items that match the search criteria.
# of Unique Hits	The number of found items that no other search in the case has retrieved.
Submitted By	The name of the Discovery Accelerator user who submitted the search.

The following table lists the Search Criteria fields.

Table 6-11 Search Criteria fields

This field	Shows
Date Ranges	The date range between which items must be sent or received to match the search criteria.
To	The recipients of the items.
From	The senders of the items.
Subject	The words or phrases for which to search in the subject lines of items.
Content	The words or phrases for which to search in the message bodies of items.
Number of Attachments	The required number of attachments to items.
Attachment Type	The file name extensions of particular types of attachments for which to search.
Message Size	The size of item for which to search.
Message Type	The type of item for which to search.
Retention Category	The selected retention category that Enterprise Vault has assigned to the items.
Policy Type	The selected policy type (Inclusion, Exclusion, or Category) with which third-party policy management software has tagged the items.

Table 6-11 Search Criteria fields (*continued*)

This field	Shows
Policy	The specific policy with which the policy management software has tagged the items.
Filter Policies by Case	The filter applied in the search to sort by case.

Security report

The Security report provides information on the users who have access to the selected case, and their associated roles and permissions.

This report contains the following fields.

Table 6-12 Fields in the Security report

This field	Shows
Security Details	
Role	The security role in Discovery Accelerator.
User/Group Names	The users and groups to whom you have assigned the role.
Allow Permissions	The permissions that you have assigned to Discovery Accelerator users and groups with the specified role.
Deny Permissions	The permissions that users and groups with the specified role cannot have, even if they occupy other roles that grant the permissions to them.
User/Group Roles	
User/Group Name	The name of the Discovery Accelerator user or group.
Roles for User/Group	The roles to which you have assigned the user or group.
Effective Permissions	
User/Group Name	The name of the Discovery Accelerator user or group.
Effective Permissions for User/Group	The permissions that the Discovery Accelerator user or group has.

Viewing existing reports

Discovery Accelerator makes it easy to view the contents of a report, print it, and export it in formats such as Excel, Acrobat (PDF), XML, and comma-separated values (CSV). Note that a report is a snapshot of data at the time that you created it. Viewing the report later does not refresh the data in it, so you must create a new report if you want to view the latest data.

You must have the View Reports permission to view an existing report. By default, most users with a case role have this permission.

To view an existing report

- 1 Click the **Reports** tab in the Discovery Accelerator client.
- 2 In the center pane, click the report that you want to view. Discovery Accelerator provides information on the selected report in the **Details** tab at the right.

You can filter the list of reports by checking the options in the left pane. Alternatively, in the **Search Reports** box at the top of the center pane, enter a keyword for which to search in the names and descriptions of the reports.

- 3 Click the **Preview** tab to display the contents of the report.
- 4 Do one or more of the following:
 - To page through the report, go to a specific page, find a specific word, or adjust the magnification level, click the navigation controls at the top of the preview pane.
 - To export the report, select the required format and then click **Export**. Discovery Accelerator prompts you to choose a location for the report file.
 - To update the report contents, click **Refresh**.
 - To print the report, click **Print** and then select the printing options that you want.

Deleting reports

When you have no further use for a report, you can delete it from Discovery Accelerator.

You must have the View Reports permission to delete a report. By default, most users with a case role have this permission.

Caution: You cannot recover reports that you accidentally delete.

To delete a report

- 1 Click the **Reports** tab in the Discovery Accelerator client.
- 2 In the left pane, click the report that you want to delete.
- 3 Click **Delete Report** at the top left of the window.
- 4 Click **Yes** to confirm that you want to delete the report.

About viewing Discovery Accelerator datasets using the OData web service

Apart from creating and viewing reports from the Discovery Accelerator client, you can expose information from the Discovery Accelerator configuration and customer databases through the OData web service. You can use this information with any OData-compatible reporting tool to create reports as required. Examples of such reporting tools include Excel/PowerQuery and Microsoft SQL Server Reporting Services (SSRS).

Available Discovery Accelerator datasets

[Table 6-13](#) describes the Discovery Accelerator datasets that you can view through the OData web service.

Table 6-13 Available Discovery Accelerator datasets

This dataset	Shows
CaseHistory	Information on the items in each case review set and the number of items in various stages of review.
Cases	Information on all cases across all customer databases.
Customers	Information on all customer databases.
ExportRunDuplicates	Information about the duplicate items that Discovery Accelerator found because you chose to enable deduplication when you conducted an export run.
ItemDetails	Information on all the items in one or all of the cases that were associated with the specified customer database.
LegalHoldArchives	Details of legal holds in one or more archives.

Table 6-13 Available Discovery Accelerator datasets (*continued*)

This dataset	Shows
LegalHolds	A summary of the items on which Discovery Accelerator has placed a hold to stop them from being deleted from the Enterprise Vault archives.
LegalHoldSearches	Details of the searches that you have conducted for a case and details of the held items in the search results.
ProductionRun	Information on the items in each production run for a selected case.
ProductionRunDuplicates	Information about the duplicate items that Discovery Accelerator has found because you chose to enable deduplication when you conducted a production run.
Productions	Information on the production runs that were conducted for the selected case.
SearchCriteria	Details of search criteria used in a particular search.
SearchDetails	Details of searches for a specific customer.
Searches	Information on one or all of the searches in a specified case, or in all the cases in a specified customer database.
UserRolesAndPermissions	Information on the users who have access to the selected case, and their associated roles and permissions.

Accessing the Discovery Accelerator datasets

You can access the datasets by typing the following addresses in the address bar of your web browser. In each case, *server_name* is the name of the server on which you have installed the Discovery Accelerator server software.

- To access a list of all the available datasets, type the following:
`http://server_name/DARreporting/OData`
- To access a list of all the available datasets together with all the fields included in each dataset, type the following:
`http://server_name/DARreporting/OData/$metadata`
- To access a particular dataset, type the following:

`http://server_name/DAReporting/OData/dataset_name`

Using the OData service with Microsoft Excel

The following instructions are for Microsoft Excel 2010 and 2013. Make sure that you have installed the Microsoft Power Query add-in for Excel. You can download the add-in from the following page of the Microsoft website:

<https://www.microsoft.com/download/details.aspx?id=39379>

To use the OData service with Microsoft Excel

- 1 Open Microsoft Excel.
- 2 Create a new, blank workbook.
- 3 On the **Power Query** tab, in the **Get External Data** group, click **From Other Sources**, and then click **From OData Data Feed**.
- 4 In the **OData Feed** dialog box page, in the **URL** box, specify the website address for the data feed as follows:

`http://server_name/DAReporting/OData/dataset_name(parameter=value)`

For example:

`http://da.mycompany.com/DAReporting/OData/CaseHistory(customerID=1005, caseID=5)`

Note: Take care to specify the mandatory parameters that are required to view the dataset. Except for the Customers dataset, all the datasets have mandatory parameters. For information on them, see the online Help for each dataset.

- 5 If you are prompted for your credentials, enter them and then log in. The Query Editor opens.
- 6 In the Query Editor, view the records available for the dataset. Edit the queries as required.
- 7 Click **Close & Load** to import the dataset information in Excel in tabular format.

Using the OData service with Microsoft SQL Server Reporting Services (SSRS)

The following instructions are for Microsoft SQL Server Reporting Services (SSRS).

To use the OData service with Microsoft SQL Server Reporting Services (SSRS)

- 1 Open Report Builder.
- 2 Add a new datasource as an XML connection type.
- 3 In the **Connection string** box, specify the URL for the data feed as follows:
`http://server_name/DAReporting/OData/dataset_name(parameter=value)?$format=application/atom+xml`
 For example:
`http://da.mycompany.com/DAReporting/OData/Cases(customerID=1)?$format=application/atom+xml`
- 4 Provide credentials to connect to the data source.
- 5 Click **OK**.
- 6 Add the dataset using the above mentioned datasource.
- 7 Select **Use a dataset embedded in my report**.
- 8 Select the dataset from the list.
- 9 Set the query as follows:

```
<Query>
  <ElementPath IgnoreNamespaces="true">
    feed{} /entry{} /content{} /properties
  </ElementPath>
</Query>
```
- 10 Click **Refresh Fields**.
- 11 Use the new dataset as reporting data for the SSRS report.

Troubleshooting OData errors

[Table 6-14](#) describes the errors that you may see when accessing the Discovery Accelerator datasets along with the appropriate HTTP error status code.

Table 6-14 Error messages and HTTP codes

HTTP code	Message text	Description
204	Content for this dataset is not available.	<p>The dataset that you want to access does not have any information.</p> <p>In the SearchCriteria dataset, you may see this error if the search ID does not belong to the case ID specified in the query.</p>
400	Invalid request format.	The format of the OData URL may be incorrect.
401	Access denied. You do not have permission to view this dataset.	You do not have the required permissions to access the dataset.
501	An exception occurred when getting dataset information.	An internal error was encountered when retrieving information for the specified dataset.

Enterprise Vault properties for use in Discovery Accelerator searches

This appendix includes the following topics:

- [About the Enterprise Vault search properties](#)
- [System properties](#)
- [Custom Enterprise Vault properties](#)
- [Custom Enterprise Vault properties for File System Archiving items](#)
- [Custom Enterprise Vault properties for SharePoint items](#)
- [Custom Enterprise Vault properties for Compliance Accelerator-processed items](#)
- [Custom properties for use by policy management software](#)
- [Custom properties for Enterprise Vault SMTP Archiving](#)

About the Enterprise Vault search properties

When Enterprise Vault processes an item, it populates a number of the item's properties with information and stores this information with the archived item. This information is accessible in Discovery Accelerator searches; in the **Custom attributes** section of the search properties pane, you can enter the relevant property details as free-form attributes.

The Enterprise Vault search properties fall into the following categories:

- System properties, such as the author of an email message or the number of attachments.
- Custom Enterprise Vault properties, such as the type or direction of a message.
- Custom properties for the items that Enterprise Vault for File System Archiving has processed.
- Custom properties for the items that Enterprise Vault for Microsoft SharePoint has processed.
- Custom properties for the items that Compliance Accelerator has randomly sampled.
- Custom properties for Enterprise Vault Data Classification Services.
- Custom properties for Enterprise Vault SMTP Archiving.

Not all properties are present on every item.

System properties

[Table A-1](#) lists the system properties defined in Enterprise Vault.

Table A-1 Enterprise Vault system properties

Property	Type	Description
adat	Date	The date on which the item was archived.
anum	Number	The attachment number. Specify 0 for the top-level item.
audn	String	The display names of the author and, if appropriate, of the person on whose behalf the item has been sent.
auea	String	The email addresses of the author and, if appropriate, of the person on whose behalf the item has been sent.
auot	String	The author's other email address.
asum	String	The author's SMTP email address. Combines the values of properties wrsm, frsm, and ppsm.
auth	String	The author.
cend	Date	The end date of an event, such as a calendar meeting.
clcn	String	The current location of the item. A sequence of folders.
clon	String	The location of an event, such as a calendar meeting.

Table A-1 Enterprise Vault system properties (*continued*)

Property	Type	Description
cnid	String	The conversation tracking identifier, expressed as a 32-character hexadecimal number. This is currently populated for MAPI and SMTP items only.
cntp	String	The conversation tracking topic. This is currently populated for MAPI and SMTP items only.
coid	String	The original identifier for this component of the item.
comr	String	The reason for missing content. The options are as follows: <ul style="list-style-type: none">■ 0. No reason available.■ 1. Content does not exist.■ 2. Content could not be obtained.■ 3. Content is (or appears to be) corrupt.■ 4. Not possible to convert content to suitable format.■ 5. Conversion of content failed (converter error).■ 6. Conversion of content timed out.■ 7. Content requires conversion but its data format is excluded from conversion.■ 8. Content requires conversion but conversion bypass has been set.■ 9. Content is encrypted.■ 10. Content requires conversion but converters are not available, or have not been initialized.■ 11. Unable to add content to index.■ 12. Converters did not recognize the file type.■ 13. Conversion excluded for large files.■ 14. Conversion excluded for codepages we cannot detect.
cont	String	The content of the item (up to 128 characters, by default).
cpid	String	The ID of either an extension content provider instance or an Enterprise Vault archiving task.
cpnm	String	The name of the extension content provider.
crn	String	The current retention category name (up to 32 characters). The property value may reflect the value applied to the archive by a retention plan that overrides the item's retention category.

Table A-1 Enterprise Vault system properties (*continued*)

Property	Type	Description
crcr	String	The current retention category identifier (up to 112 characters). The property value may reflect the value applied to the archive by a retention plan that overrides the item's retention category.
crre	Integer	Calendar recurrence exception.
crpp	String	Calendar recurrence pattern.
crrt	Integer	Calendar recurrence type.
csrt	Date	The start date of an event, such as a calendar meeting.
cupm	String	Truncated custom index properties.
date	Date	The created, sent, received, or archived date.
dtyp	String	The data type of the item. For example, DOCX, XLSX, or MSG.
edat	Date	The expiry date for the item (based on the crcr property), in the range 01/01/1970 through 01/01/2038. The property value may reflect the value applied to the archive by a retention plan that overrides the item's retention category.
flag	String	The message flag status.
fpcn	String	The content fingerprint of the item. Can be used to find a match on an attachment or document content.
fpdd	String	The deduplication fingerprint of the item. Can be used to find an exact match of a message or a document. Wildcard searches on this property are not supported.
frdn	String	FROM: Display/friendly name.
frea	String	FROM: Email address. Combines the values of properties frsm and frot.
from	String	The display/friendly name or email address.
frot	String	FROM: Other email address.
frsm	String	FROM: SMTP e-mail address.

Table A-1 Enterprise Vault system properties (*continued*)

Property	Type	Description
iden	String	The original identifier for the item. For example, SubmissionId for a sent message.
impo	String	The message importance, expressed as a numeric value. 0 = Low, 1 = Normal, and 2 = High.
isrc	String	Whether Enterprise Vault has marked the item as a record (True) or not (False). For use with Capstone and other approaches to records management. Can be referenced by either "isrecord" or "isrc". Not supported by queries that target 32-bit volumes.
jaen	String	Message envelope: other author.
jrau	String	Message envelope: author. Only present for Exchange journal messages. The property values include both email addresses and display names, where present.
jrbcc	String	Message envelope: BCC: recipient.
jrcc	String	Message envelope: CC: recipient.
jrcp	String	Message envelope: recipient. Only present for Exchange journal messages. The property values include both email addresses and display names, where present.
jren	String	Message envelope: other recipient.
jrfm	String	Message envelope: FROM: recipient.
jrpp	String	Message envelope: PP: recipient.
jrto	String	Message envelope: TO: recipient.
keys	String	Categories/keywords.
locn	String	The original location of the item. A sequence of folders.
mdat	Date	The last-modified date of the item.
msgc	String	The item's original MAPI message class (for example, IPM.Note).
nadn	String	Name. Display/friendly name. Combines the values of properties redn and audn.

Table A-1 Enterprise Vault system properties (*continued*)

Property	Type	Description
naea	String	Name. Exchange email address. Combines the values of properties reea and auea.
name	String	The display/friendly name or email address of the message author or recipient.
naot	String	Name. Other email address. Combines the values of properties reot and auot.
nasm	String	Name. SMTP email address. Combines the values of properties resm and ausm.
natc	Number	The number of attachments.
ndte	Number	The number of days to expiry for the item (based on the current retention category identifier). The property value may reflect the value applied to the archive by a retention plan that overrides the item's retention category.
nrcp	Number	The number of recipients.
ppdn	String	PP. Display/friendly name.
ppea	String	PP. Exchange email address. Combines the values of properties ppsm and ppot.
ppgn	String	The display/friendly name or email address of the person on whose behalf a document has been written or a message has been sent.
ppot	String	PP. Other email address.
ppsm	String	PP. SMTP email address.
prio	String	The message priority, expressed as a numeric value. -1 = Low, 0 = Normal, and 1 = High.
pvid	String	The permission VaultIds for the item (up to 112 characters).
rbcc	String	BCC: recipient.
rbdn	String	The display names of the BCC recipients.
rbea	String	The email addresses of the BCC recipients.
rbot	String	BCC: recipient. Other email address.

Table A-1 Enterprise Vault system properties (*continued*)

Property	Type	Description
rbsm	String	BCC: recipient. SMTP email address.
rcat	String	The original retention category identifier (up to 112 characters).
rcdn	String	The display names of the CC recipients.
rcea	String	The email addresses of the CC recipients.
rcid	String	The record ID of the item. For use with Capstone and other approaches to records management. Can be referenced by either "recordid" or "rcid". Not supported by queries that target 32-bit volumes.
rcot	String	CC: recipient. Other email address.
rasm	String	CC: recipient. SMTP email address.
recc	String	CC: recipient.
recp	String	The display/friendly name or email address of the message recipient.
redn	String	Message recipient. Display/friendly name. Combines the values of properties rtdn, rcdn, rbdn, and rndn.
reea	String	Message recipient. Email address. Combines the values of properties rtea, rcea, rbea, and rnea.
reot	String	Message recipient. Other email address. Combines the values of properties rtot, rcot, rbot, and rnot.
resm	String	Message recipient. SMTP email address. Combines the values of properties rtsm, rasm, rbsm, and rnsn.
reto	String	TO: recipient.
rndn	String	Other envelope recipient. Display/friendly name.
rnea	String	Other envelope recipient. Email address. Combines the values of properties rnsn and rnot.
rnot	String	Other envelope recipient. Other email address.
rnsn	String	Other envelope recipient. SMTP email address.
rtdn	String	The display names of the TO recipients.

Table A-1 Enterprise Vault system properties (*continued*)

Property	Type	Description
rtea	String	The email addresses of the TO recipients.
rtot	String	TO: recipient. Other email address.
rtsm	String	TO: recipient. SMTP email address.
rtyp	String	The record type of the item, such as permanent or temporary. For use with Capstone and other approaches to records management. Can be referenced by either "recordtype" or "rtyp". Not supported by queries that target 32-bit volumes.
sens	String	The message sensitivity, expressed as a numeric value. 0 = Normal, 1 = Personal, 2 = Private, and 3 = Confidential.
size	Number	The size of the item in KB.
snum	Number	The index sequence number, expressed as a 64-bit integer.
ssid	String	The saveset identifier of the item. Maximum of 72 characters. Wildcard searches on this property are not supported.
subj	String	The subject/title.
tcdt	Date	The completion date of a task.
tddt	Date	The due date of a task.
text	String	The content of the item (cont) or its subject/title (subj).
tsts	Number	The status of a task. 0 = Not started, 1 = In progress, 2 = Completed, 3 = Paused, and 4 = Deferred.
wrdn	String	Writer. Display/friendly name.
wrea	String	Writer. Email address. Combines the values of properties wrsm and wrot.
writ	String	Writer. Combines the values of properties wrdn, wrea, wrsm, and wrot.
wrot	String	Writer. Other email address.
wrsm	String	Writer. SMTP email address.

Custom Enterprise Vault properties

Table A-2 lists the custom properties that are defined in Enterprise Vault.

Table A-2 Custom Enterprise Vault properties

Property	Type	Description
Vault.CopiedFrom	String	<p>Provides the following details for an item that Enterprise Vault's Move Archive feature has copied:</p> <ul style="list-style-type: none">■ The date and time at which the item was copied.■ The identifier of the source archive.■ The saveset identifier of the source item. <p>The format is as follows:</p> <p><i>UTC_datetime_of_copy,source_archive_ID,source_item_Saveset_ID</i></p> <p>If an archive has been moved several times, there is a value for each move.</p>
Vault.JournalType	String	<p>For journal messages, the journal type. The options are as follows:</p> <ul style="list-style-type: none">■ E2003■ E2007■ E2007ClearText■ E2007RMS
Vault.MsgDirection	String	<p>The message direction. The options are as follows:</p> <ul style="list-style-type: none">■ 0 - undefined■ 1 - internal (sender and all recipients are internal)■ 2 - external-in (sender is external, one or more recipients are internal)■ 3 - external-out (sender is external, one or more recipients are external)

Table A-2 Custom Enterprise Vault properties (*continued*)

Property	Type	Description
Vault.MsgType	String	The message type. The options are as follows: <ul style="list-style-type: none">■ Bloomberg■ DXL■ EXCH■ FAX.vendor■ IM.vendor■ SMTP

Custom Enterprise Vault properties for File System Archiving items

[Table A-3](#) lists the custom properties that are defined in Enterprise Vault for File System Archiving items.

Table A-3 Custom Enterprise Vault properties for File System Archiving items

Property	Type	Description
EVFSADLMImport.DLM	String	An indicator that the item was imported from the legacy archiving application, Veritas Data Lifecycle Management (DLM). This is currently only populated with the string "Imported".
EVFSA.OriginalFileName	String	The original name of the file at the point that Enterprise Vault archived it.

Custom Enterprise Vault properties for SharePoint items

[Table A-4](#) lists the custom properties that are defined in Enterprise Vault for SharePoint items.

Some of these properties are similar to certain Enterprise Vault system properties. For example, the SharePoint property, "EVSP.Title", is similar to the Enterprise Vault system property, "subj". However, the Enterprise Vault system property may not hold the expected information for some SharePoint items, such as social content

items. For this reason, you should use the custom SharePoint index properties instead of the equivalent Enterprise Vault system properties when searching SharePoint archives.

Table A-4 Custom Enterprise Vault properties for SharePoint items

Property	Type	Description
EVSP.AttachmentName	String	A list of names of all the attachments to this item. This property applies to social content only, except for Wikis.
EVSP.Comment	String	The check-in comment.
EVSP.Created	String	The date of creation of the item. This property applies to social content only.
EVSP.CreatedBy	String	The domain name (Windows account name) of the document author.
EVSP.DocId	String	The identifier of the SharePoint document.
EVSP.Editor	String	The display name of the document editor.
EVSP.Modified	String	The date on which the item was last modified. This property applies to social content only.
EVSP.ModifiedBy	String	The domain name (Windows account name) of the document editor.
EVSP.ProgId	String	The program identifier for the item.
EVSP.Site	String	The name of the SharePoint site.
EVSP.SiteId	String	The identifier of the SharePoint site.
EVSP.SiteUrl	String	The URL of the SharePoint site.
EVSP.Title	String	The title of the SharePoint document.
EVSP.UniqueId	String	The GUID that uniquely identifies the item.
EVSP.Version	String	The version of the SharePoint document.
EVSP.Attachments	String	Whether the item has attachments: true or false. This property applies to social content only, except for Wikis.
EVSP.display_name	String	The display name of the archived item.

Table A-4 Custom Enterprise Vault properties for SharePoint items
(continued)

Property	Type	Description
EVSP.SharePoint_property_name	String	Customer configurable properties. Any SharePoint property.

Custom Enterprise Vault properties for Compliance Accelerator-processed items

[Table A-5](#) lists the custom properties that are defined in Enterprise Vault for the items that Compliance Accelerator has randomly sampled.

Table A-5 Custom Enterprise Vault properties for Compliance Accelerator-processed items

Property	Type	Description
KVSCA.Department	String	Combines the values of properties KVSCA.DeptAuthor and KVSCA.DeptRecips.
KVSCA.DeptAuthor	String	The set of Compliance Accelerator Department IDs of which the item's author is a member.
KVSCA.DeptRecips	String	The set of Compliance Accelerator Department IDs of which the item's recipients are members.
Vault.PolicyAction	String	The overall action that should be taken on an item; the sum result of all the applied policies. The defined values are as follows: <ul style="list-style-type: none">■ NOACTION■ EXCLUDE■ INCLUDE

Custom properties for use by policy management software

[Table A-6](#) lists the custom properties that certain policy management applications, such as Enterprise Vault Data Classification Services, may use.

(Data Classification Services is an older, add-on classification technology that combines various components of Veritas Enterprise Vault and Symantec Data Loss Prevention. It is different from the built-in classification feature that was introduced in Enterprise Vault 12.)

Table A-6 Custom properties for use by policy management software

Property	Type	Description
evtag.category	String	Policies that do not affect capture either way; they only categorize items.
evtag.exclusion	String	Policies that either preclude capture or advocate non-capture in the review set.
evtag.inclusion	String	Policies that either demand or suggest capture.

Custom properties for Enterprise Vault SMTP Archiving

[Table A-7](#) lists the custom properties that third-party applications can add to SMTP messages to override the policy and target settings in Enterprise Vault SMTP Archiving. For more information on these properties, see the *Setting up SMTP Archiving* guide.

Table A-7 Custom properties for Enterprise Vault SMTP Archiving

Property	Type	Description
EVXHDR.X-Kvs-ArchiveId	String	The identifier of the archive in which to store the message.
EVXHDR.X-Kvs-IndexData	String	One or more properties for Enterprise Vault to index.
EVXHDR.X-Kvs-MessageType	String	The message type. This overrides the value of the Vault.MsgType property, which Enterprise Vault SMTP Archiving sets to SMTP.mail by default.
EVXHDR.X-Kvs-OriginalLocation	String	The folder in the content source where the message resides.
EVXHDR.X-Kvs-RetentionCategory	String	The ID of the retention category to assign to the message.

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