Veritas Surveillance Reviewer's Guide

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Veritas Surveillance: Reviewer's Guide

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Contents

Chapter 1

Introducing Veritas Surveillance

This chapter includes the following topics:

About Veritas Surveillance

This guide describes the procedures involved in configuring and managing Veritas Surveillance and ensures that organizations meet electronic communication supervision requirements.

Key features of Veritas Surveillance

Veritas Surveillance streamlines compliance search and review tasks with intuitive workflows adhering to industry best practices. It empowers organizations to conduct cost-effective supervisory reviews, ensuring regulatory compliance in employee communications.

Some important key features of Veritas Surveillance are listed below:

- **Replacement for Compliance Accelerator desktop client**
  The Compliance Accelerator desktop client, used until the 14.5 release, is discontinued. It has been entirely replaced by the more efficient web-based alternative, Veritas Surveillance. Compared to the desktop client, Veritas Surveillance, being a web-based client, offers more convenient workflows for managing departments, employees, item searches, intelligent reviews, exporting search results, and various other operations.
  See "Feature comparison: Compliance Accelerator desktop client Vs Veritas Surveillance web client" on page 8.

- **Systematic organizational structure mapping**
  Veritas Surveillance enables organizations to replicate their departmental structure, moving departments from one department to other, add employees and employee groups for easy monitoring.

- **Role-based access to features**
  The accessibility of features in Veritas Surveillance varies according to the roles assigned to users, with distinct levels of permissions defined for each role.
  - **Administrators** can configure, manage and control the application workflow.
  - **Reviewers** can monitor, review, keep the review pending, question, escalate, appraise, and comment on the items that they review manually or with the help of hotwords. Additionally, they can add comments, assign review status to captured items, view history of items, print and download the items, Generate reports for the collected information, and export the items and reports for offline reviews or for approved third-party use.

- **Efficient items searching and labeling**
  Veritas Surveillance supports department-level and application-level searches and labels. It captures archived items from various content sources, including Microsoft Exchange, Domino journal mailboxes, SMTP, and Shared Enterprise Vault archives across Enterprise Vault sites. By default, all application-level archives are accessible in departments. However, later, the department administrator can include or exclude the archives as needed.

- **Efficient items sampling**
  While configuring a monitoring policy during creating a department, users can select their preferred sampling mode from the following options:
  - ***Guaranteed sampling***: This is the default mode. In this mode, the application captures all items for each monitored employee throughout the day. There is no option to restrict or limit the number of items that are added to the review set.

- ***Random sampling***: In this mode, the application randomly selects items from each monitored employees according to the specified monitoring policy and adds these sampled items to the review set.
- ***Statistical sampling***: In this mode, the application selects the items that are randomly sampled in the previous 24-hours period and adds these sampled items to the review set. As a result, certain employees may have fewer captured items compared to others.

- **Deduplication of items**

  This feature empowers organizations to identify and eliminate duplicates from search results, preventing their inclusion in the review set. The fingerprint mechanism is used to determine whether one item is a duplicate of another. Deduplication works within individual searches only, and does not work across multiple searches, even when conducted within the same department. During sampling, the duplicate items in all search types (immediate, scheduled, and guaranteed sample searches) are removed. In guaranteed sample searches, it includes randomly sampled items in the review set to make up for any shortage caused by the deduplication process.

- **Effective review process**: Messages from specific employees who are exceptions can be kept apart and checked by assigned reviewers.

- **Intelligent review**

  This feature helps application to learn from the reviewer's actions of marking items as relevant or irrelevant, allowing it to intelligently capture and sample items the next time and categorize items as relevant or irrelevant before presenting then to reviewers. This way, reviewers can efficiently spend their review time by focusing more on the relevant items over irrelevant ones.

- **Secured database**
  - A secured SQL database stores details about monitored employees, captured items, and the review processes applied to those items.
  - Customers' sensitive data residing in temporary storage is encrypted for enhanced security.

- **Enhanced reporting**: This feature empowers organizations to enhance their reporting and analytics capabilities. Veritas Surveillance provides predefined Power BI Templates that consume Reporting API endpoints to view interactive reports.
  - ***SSRS reports***: Though the support for SSRS reports is discontinued, users can still access the previously generated SSRS reports from database.

- ***OData reports***: The Open Data (OData) web service enables users to retrive information from the configuration and customer databases using OData-compatible reporting tools like Microsoft Excel and PowerQuery.
- ***Enhanced reports***: New reporting endpoint APIs, such as *Departments*, *Users*, *UserRoles*, *Roles*, *ItemMetrics*, *ReviewerMapping*, *MonitoredEmployees*, *EvidenceOfReviewAsync*, *EvidenceOfReview*, and *ReviewStatus* are introduced.

- **Enhanced auditing**: This feature enables users to search and export audit records for different modules and operations within Veritas Surveillance.

Feature comparison: Compliance Accelerator desktop client Vs Veritas Surveillance web client

If you previously used the Compliance Accelerator desktop client and would like to examine the features of both the Compliance Accelerator desktop client and the Veritas Surveillance web client, refer to the table provided below.

Feature	Compliance Accelerator	Veritas Surveillance	Details
Only server installation required	No	Yes	Accessing Veritas Surveillance does not require client installation; server installation alone is sufficient.
Windows-based Authentication and Authorization	Yes	Yes	
Dashboard			
Dashboard: Summary	Yes	Yes	
Dashboard: Summary: Pin/Unpin Departments	No	Yes	
Dashboard: Task	Yes	No	Links are provided to perform some tasks.
Departments			
Department: User Summary	Yes	Yes	

Feature	Compliance Accelerator	Veritas Surveillance	Details
Department: User Action	Yes	Yes	
Department: Department Attributes	Yes	No	
Department: Role assignment	Yes	Yes	
Department: Searches	Yes	Yes	
Department: Searches: Custom Attributes	No	Yes	
Department: Monitoring Employees	Yes	Yes	
Department: Archives	Yes	Yes	
Department: Export	Yes	Yes	
Department: Hotwords	Yes	Yes	
Department: Labels	No	Yes	
Department: Review Comments	No	Yes	
Research Folders	Yes	No	
Employees	Yes	Yes	Profile creation and management
Reports	Yes	Partially yes	
Monitor	Yes	Yes	
Application			
Application: Roles	Yes	Yes	
Application: Roles Assignments	Yes	Yes	
Application: Hotwords	Yes	Yes	
Application: Label	No	Yes	
Application: Reviewing Comments	Yes	Yes	

Feature	Compliance Accelerator	Veritas Surveillance	Details
Application: Searches	Yes	Yes	
Application: Archives	Yes	Yes	
Review			
Review: Review Pane Actions	Yes	Yes	Copy action is not available in Veritas Surveillance.
Review: Advanced Filter	No	Yes	Filter on Author/Domain and Subject is provided.
Review: Filters	Yes	Yes	
Review: Filters: Sentiment Score	No	Yes	
Review: Delegate review (on behalf of mode)	Yes	No	
Review: Printable View	Yes	No	
Review: Bulk Review	Yes	Yes	
Review: Review Status	Yes	Yes	
Review: Research folder review	Yes	Yes	Some actions, such as Escalate, Commit, and Copy are not available in Veritas Surveillance.
Review: Hit highlight navigation for Hotwords	Yes	Yes	
Review: Labels	No	Yes	
Review: Review Comments	No	Yes	
Review: Hit highlight navigation for Tags	No	Yes	
Configuration			
Configuration: Search Schedules	Yes	Yes	

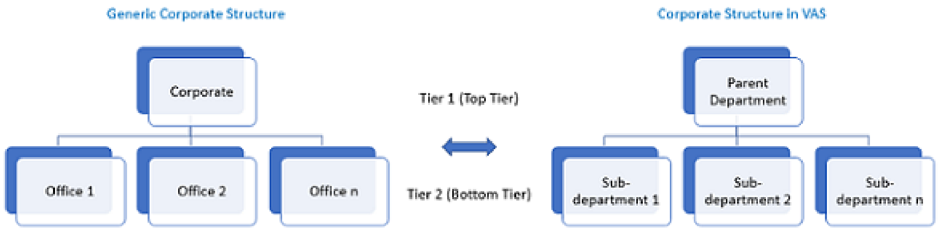
Feature	Compliance Accelerator	Veritas Surveillance	Details
Configuration: Reviewing status	Yes	No	
Configuration: Import configuration	Yes	No	
Configuration: Account Information	Yes	No	
Configuration: Directory Mappings	Yes	No	
Configuration: Department partitions, Attributes	Yes	No	
Configuration: Message Types	Yes	No	
Configuration: Settings	Yes	No	
Configuration: Audit settings	No	Yes	Modules can be enabled or disabled for auditing purposes.
Enhanced Auditing	Yes	Yes	
Audit Viewer	No	Yes	The operations and modifications made to any modules are shown in the **Audit Settings**.
Hotword analysis and statistics	Yes	Yes	Hotword analysis is done, and filters and counts are updated to view the statistics.
Tag (Policy) analysis and statistics	No	Yes	Tag (Policy) analysis is done, and counts are updated to view the statistics.
Custom attributes	Yes	Yes	
Intelligent Review	Yes	Yes	

Feature	Compliance Accelerator	Veritas Surveillance	Details
Advanced Intelligent Review	No	Yes	The relevance score and the reasoning behind classifying the item as Unreviewed Relevant or Unreviewed Irrelevant are provided. Content snippets are added to train the learning model.
Microsoft Teams Chat and Channel support	No	Yes	
Audio-Video Transcript support	No	Yes	
Chinese Wall security	Yes	No	
Localization of UI and Documentation	Yes	No	Compliance Accelerator user interface and user documentation are translated into Japanese, Chinese Simplified, and Chinese Traditional languages for localization purposes.

About Veritas Surveillance system security

Veritas Surveillance multi-tier architecture

Veritas Surveillance has a two-tier architecture, which provides the ability to manage and delegate compliance responsibilities across multiple geographical, functional, and departmentally-distributed compliance departments. The following diagram illustrates this architecture:



The mirroring of an organizational department can be accomplished by creating departments and sub-departments in Veritas Surveillance. The parent department (top tier) is a Corporate Office tier. The sub-department (bottom tier) is an office tier in which an administrator can create as many sub-departments as necessary. This architecture enables the corporate office to distribute the items monitoring workload to the second-tier offices as required.

Within a department in Veritas Surveillance, an administrator or a reviewer can:

- Create another department for monitoring individual compliance and subsequently generate department-specific reports.
- Create, edit, and delete reviewer and escalation reviewer accounts for an office.
- Control whether the reviewers in an office can create hotwords (department-specific keywords or phrases) as per the compliance policy.
- Create compliance-specific searches (immediate, scheduled, and guaranteed sample searches).
- Monitor and review items.
- Reassign items to an escalation reviewer for approval or rejection.
- Export and print search results and reports for offline review or for sharing with an approved third-party organization.

System requirements

Compatibility documentation

Product documentation

Chapter 2

Getting started

This chapter includes the following topics:

Signing in to Veritas Surveillance

To sign in to Veritas Surveillance

1. Enter the Veritas Surveillance URL in the internet browser.

   For the best viewing experience, use Mozilla Firefox or Google Chrome. Veritas Surveillance is not supported on Internet Explorer.

   Note: Whenever a new version of the Veritas Surveillance application is available, the application displays the following alert.

   "A new version of this app is available. It is recommended to close all open tabs and reopen application for better experience. Click OK to refresh."

   Veritas recommends you to click **OK** and close all the open browser tabs. Open the application again. In case you do not perform this action, the application page gets refreshed automatically and opens the latest version of the application.

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2. (Optional) Bookmark this URL in the Veritas Surveillance compatible internet browser.

   See "System requirements" on page 13.

3. Enter your user name and password in the authentication screen.
4. Click **Sign In**.

Signing out from Veritas Surveillance

To sign out from Veritas Surveillance

1. On the Veritas Surveillance user interface, in the upper right-hand corner, click the user profile icon.
2. Click **Log Out**.

Chapter 3

Working with dashboard widgets

This chapter includes the following topics:

Understanding the Dashboard page

After logging in to Veritas Surveillance, your dashboard appears by default. If not, you can view it by clicking the **Dashboard** tab. The dashboard page lets you view the status of department reviews, escalations, and tasks. Aggregated statistics are used to report the status of these items.

Figure 3-1 An example of the dashboard that appears to administrators and reviewers upon login

1. Left navigation pane

The left pane provides a navigational menu. When you click on an item in this menu, the corresponding view appears in the right pane. The availability of these menu items and the corresponding views depend on the roles that are assigned to the signed-in user. Therefore, if you are a reviewer, some of these tabs may not be visible, depending on the permissions that your administrator has assigned to you.

You can click the **>>** icon to expand and the **<<** icon to collapse the navigation banner.

Tab	Description
Dashboard	This tab provides an overview of the status of the activities that you can perform in Veritas Surveillance. It also gives you quick access to the activities that you are likely to perform frequently with Veritas Surveillance.
Review	This tab displays a list of review items. A reviewer can provide comments for them and assign actions like review irrelevant or relevant, pending, question, escalate, and appraise.
Departments	This tab lets you manage departments, the monitored employees who belong to them, and reviewers assigned to department and allocate items for review to reviewers, specifying the allocation as a percentage.
Employee Groups	This tab lets you manage employee groups that belongs to departments.
Monitor	This tab lets you monitor and resubmit searches as necessary.
Application	This tab lets you access commonly used administrative facilities. You can manage the following: ■ **Roles** – Set up and amend the roles you can assign to users to manage their access to Veritas Surveillance. ■ **Role Assignment** – Assign Veritas Surveillance roles to users. ■ **Reviewer Assignment** – Allocate items for review to reviewers, specifying the allocation as a percentage. ■ **Hotwords** - Set up lists of important words that you may want to search within archived items.
Configuration	This tab lets you: ■ Create schedules at which searches can run across multiple departments. ■ Manage audit settings for the Audit viewer. ■ Configure reporting API endpoints that can be used to generate reports and perform data analytics through custom scripts or templates.

Tab	Description
Audit viewer	This tab lets you search and save audit records for various modules and operations at department and application level.

2. Banner

The banner contains the Veritas Surveillance logo, company name, user name of the administrator or reviewer who is signed in, the **Help** icon, the **Notifications** icon, and the **Account Profile** icon.

- Click the **Help** icon to display application help in a separate window, without leaving the application window.
- Click **Log Out** to exit the application.

3. Details pane

The details pane displays summary of the following sections:

- **Review Status:** Provides details of up to five or less pinned departments. If user has not pinned any department, then it presents details of the five departments to which that user has access.
- **Escalations:** Provides details of escalated items.
- **Searches and Export Status:** Displays results of the last few exports and searches run by a user.

Viewing status summary of recently reviewed departments

The **Review Status** widget displays detailed information on review status of your pinned departments. If user has not pinned any departments, then it displays detailed information on review status of 5 departments to which you have access. You can pin (bookmark) up to five departments to quickly view their review status when required. If you try to select the sixth department, a notification appears that you cannot pin more than five departments. If the pinned departments are no longer required, you can unpin them.

When you log out and log in the session again, the pinned departments from the last session are displayed.

If you have permissions to view department reviewers details, click the **>** icon to expand the department row. When department row is expanded, the department reviewer details are displayed. You can drill down for further details in a specific area.

Figure 3-2 An example of a summary of recently reviewed departments

Review Status

Pin/Unpin Departments Update Order

Pinned Department/Reviewer	Total Items	Unreviewed	Reviewed (Relevant)	Questioned	Pending	Escalated	> 30 Days Old	Last Activity	% Complete
01 vinay dept 1 - Updated	46757	46718	7 (4)	1	31	9	46132	03/09/2024	0%
vinay-independent	455	435	17 (14)	2	1	3	419	11/21/2023	4%
000test	25350	25350	0 (0)	0	0	0	25345	-	0%
01-Karan-Test	43599	43454	117 (116)	1	27	5	43260	12/01/2024	0%
FB	112	112	0 (0)	0	0	0	65	-	0%
Total in this subset	116273	116069	141 (134)	4	59	17	115221	-	0%

It summarizes the departmental details such as:

- Total items presented for review
- Total relevant items reviewed and unreviewed
- Number of pending, questioned, or escalated items
- Items more than 30 days old that are still unreviewed
- Date of the last marking activity performed in the department
- Current review completion status

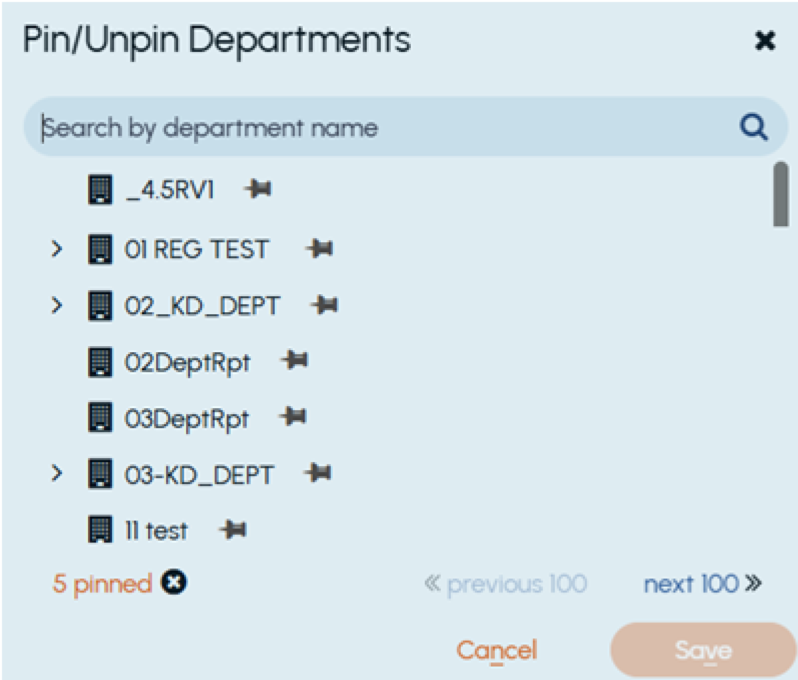
Pinning and unpinning departments to view review status

You can pin (bookmark) up to five departments to quickly view their review status when required. You can drill down for further details in a specific area. If the pinned departments are no longer required, you can unpin them.

To pin and unpin departments

1. In the left navigation pane, click **Dashboard**.
2. On the **Review Status** wizard, click **Pin/Unpin Departments**.

3 In the **Pin/Unpin Departments** dialog box, search for the department that you want to pin or unpin, then and click the pin icon adjacent to it.



The icon color and direction of the pin icon changes to indicate that the department is selected. Use the navigation arrows to go to the previous and next pages to select departments. The count of the departments selected for pin or unpin is displayed at the bottom of the dialog box.

4 Click **Save**.

If the departments selected for pinning, these departments appear on the **Review Status** wizard. If the departments selected for unpinning, these departments disappear from the **Review Status** wizard.

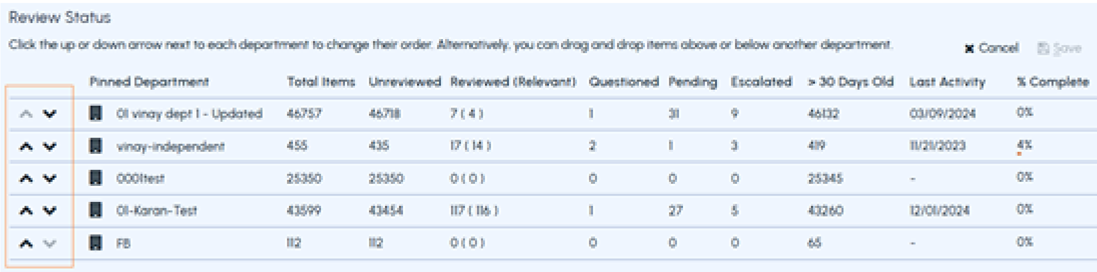
Changing the order of pinned departments

The **Update Order** button is enabled only if the **Review Status** wizard contains more than one pinned departments.

To change the order of pinned departments

1. In the left navigation pane, click **Dashboard**.
2. On the **Review Status** wizard, click **Update Order**.
3. Use the UP and DOWN arrows adjacent to the department name to change order of pinned departments.

   Alternatively, drag and drop the department above or below another pinned department.



Review Status

Click the up or down arrow next to each department to change their order. Alternatively, you can drag and drop items above or below another department.

Cancel Save

Pinned Department	Total Items	Unreviewed	Reviewed (Relevant)	Questioned	Pending	Escalated	> 30 Days Old	Last Activity	% Complete
01 vinay dept 1 - Updated	46757	46718	7 (4)	1	31	9	46132	03/09/2024	0%
vinay-independent	455	435	17 (14)	2	1	3	419	11/21/2023	4%
000Itest	25350	25350	0 (0)	0	0	0	25345	-	0%
01-Karan-Test	43599	43454	117 (116)	1	27	5	43260	12/01/2024	0%
FB	112	112	0 (0)	0	0	0	65	-	0%

Note: The **Save** option remains disabled till you change the order of at least one department.

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4. After updating the order, click **Save**.

   The dashboard refreshes and displays the updated order.

Viewing the review status summary of escalated items

The **Escalations** widget displays the escalation history for specific items.

Figure 3-3 An example of a summary of escalated items

It summarizes the details such as:

- Total items reviewed
- Total items escalated
- Total items closed
- Items more than 30 days old that are still unreviewed

Viewing a summary of searches and exports

To view a summary of completed searches

1. In the left navigation pane, click **Dashboard**.
2. Click the **Searches Status** tab to view the status of failed and completed searches.

   Click the **Exports Status** tab to view the status of failed and completed exports.

Figure 3-4 An example of Searches and Exports status on dashboard

Searches Status (884 Failed / 2691 Completed)   Exports Status (0 Completed)

Name	Department	Items	Status
DeptGss3-171224212413 (11)	Trial0Eorlm1-171224212413	0	In Review
gss01 (15)	01 vinay dept 2	0	In Review
Viva Engage Sampling (48)	Ardhendu2	0	In Review
Verint Sampling (72)	Ardhendu	0	In Review
Viva Engage Sampling (69)	Ardhendu	0	In Review
tgss1 (15)	TK_Dept32	0	In Review
DeptGss3-101224213419 (17)	Trial0Eorlm1-101224213419	0	In Review

Chapter 4

Managing department-level searches

This chapter includes the following topics:

About department-level searches

In Veritas Surveillance, you can create department-level searches. These searches can run only in a single department. You can search for the items (emails and collaboration messages) that meet certain criteria and later review these items. The search operations are based on terms like subject, tags, content, sender, recipient, dates, communication direction, and so on. If the search results are not suitable, you can reject the result and create a new search until you get the necessary information. If the search results are suitable, you can accept the search and review the items.

You can create search schedules if you want to run searches at set times or set up the recurrent searches that run automatically. You can stop and pause the searches that are still in progress, and resubmit the failed searches.

If you want to search for instances of certain words in the communication items, you can create a set of hotwords. When defining the search criteria, you can select these hotwords and hotword sets. Veritas Surveillance searches for the selected hotwords in subject and content of searched items.

Sampling of communication items is performed once on the last 24-hours data. If the sampling is aborted, it is performed on the data that was generated since the last successful completion of a sampling.

Note: Collaboration searches does not support external employees.

Guidelines for effective searches

To increase the chances of retrieving the most relevant results when conducting searches, follow these guidelines:

- Make searches precise. For example, include the author or recipient details, or specify date ranges.
- Avoid the overuse of wildcards.
- Avoid the overuse of search terms. The inclusion of several search terms together can cause iterative searches, which may slow down performance and return overlapping results.
- Quickly accept or reject searches, as completed searches that have not been accepted or rejected may affect overall search performance.
- Use one or more hotword sets in scheduled searches to allow the hotwords used to be changed as needed. It is recommended to configure a hotword set that is used by the scheduled search so that the hotwords in the hotword set can be changed as needed, and the next instance of the search will use the changes in the hotword set.

Creating and running department-level searches

To run a one-time search, create an immediate search. To run a recurring search or one that runs on a specific time, create a search schedule and then create a scheduled search.

Note: You must have the *Manage GSS and Scheduled searches* and *Search Capture* permissions to create or edit searches. By default, users that have the *Rule Admin*, the *User Admin*, and the *Exception Reviewer* roles have this permission.

To create and run a department-level search

1. In the left navigation pane, click **Departments**.
2. Search for and select the department for which you want to create and run a search.

   Note: Veritas Surveillance lists all departments. You can use the filtering options to search the required department. Options include filtering by department name, exception employees, and reviewers associated with the department.

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3. In the **Searches** tab, click **New Search**.

   The **New Search** dialog box appears.

4 In the **Search Type** section, specify the relevant information in the following fields.

This section identifies the search and specifies when it runs.

Search In	Displays the name of the department.
Search Type	Choose **Immediate** to create one-time search that runs immediately. Choose **Scheduled** to specify a period during which the search is to run. Choose **Guaranteed Sample** to run a search at the selected sampling time by default. If the search returns fewer results than your monitoring policy requires, Veritas Surveillance adds randomly-sampled items to the review set to make up the shortfall. This feature allows you to assemble more focused review sets that are weighted towards search-specific results instead of purely randomly-sampled items.
Enabled	Select the check box to enable scheduled searches and guaranteed sample searches. When a search is not enabled, it does not run.
Name	Type a name for the search.
Automatically accept search results	Select this check box to specify whether to add the search results to the review set automatically. This option is useful for verified searches that you intend to run on a regular basis. This option is enabled only if the **Accept searches** permission is assigned to the user who is creating the search. If you select this check box, you cannot reject the results and change the search criteria. Veritas Surveillance recommends that you clear **Automatically accept search results** until you have tested that the search returns the expected results. A search that returns an error from any archive is not automatically accepted, regardless of this setting.
Include items already in review	Select this check box to specify whether the search results can include the items you previously captured and added to this department's review set. This option does not apply to the items you previously included in the review sets for other departments. For an immediate search or scheduled search, you can select this box to ensure that the results include the items that may already be in review from other searches.

5 In the **Sampling** section, specify the relevant information in the following fields.

This section lets you sample the search results and add a random selection of items to the review set. Veritas Surveillance does not deduplicate randomly-sampled items.

Sampling percentage	Specify the percentage of search results to include in the review set. You can specify fractions, as in 10.25. You cannot change the sampling percentage if the owner of the department has locked this setting in the department properties.
Set minimum items per author	Specify the minimum number of items per author to include in the review set. If there are no items for an author in the search results, none can be included in the sample. Note: As the authors can be from outside the selected department, searches may return more results.
Set absolute item limit	Specify an upper limit on the total number of search results to add to the review set. This option takes precedence over any values that you set in the **Sampling percentage** field.

6 In the **Date range** section, specify the relevant information in the following fields.

This section lets you search for items according to when they were sent or received.

Specific date range	Specify the date and time duration to search items that were sent or received during the selected period.
Today / Yesterday / Last 7 days / Last 14 days / Last 28 days	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.
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).

7 In the **Authors and recipients** section, specify the relevant information in the following fields.

This section targets the departments for the search and the direction of the items to search. Any departments that you have organized into partitions can only search items to and from departments in the same partition.

Message Route

Specify the departments you wish to search as well as the direction of the items you wish to search. Search for the items that are **to** or **from** the selected departments, and for the items that have traveled **between** the selected departments and other departments.

You can search for the items that follow the following message route:

- **Between "the specified department" and**
  - other searchable departments
  - any department within the organization
  - department outside the organization
  - department internal AND/OR External to organization
- **TO "the specified department" from**
  - other searchable departments
  - any department within the organization
  - department outside the organization
  - department internal AND/OR External to organization
- **FROM "the specified department" to**
  - other searchable departments
  - any department within the organization
  - department outside the organization
  - department internal AND/OR External to organization

Any of / All of

To search within department tags, select a department. To search within the **To**/**From** fields, only select the employees.

You can expand the department tag to select monitored employees. If there are a large number of employees in the department, you can click the search icon in front of the department tag, which opens a new window where you can search and select monitored employees.

This field does not show the Employee Group names assigned to the departments. Instead, it displays the list of all the members from the employee groups individually.

Freeform email addresses / domains	This field is available for all possible message routes. Type one or more email addresses and domains. Type each address or domain on a line of its own to search for the items where the **From**, **To**, **CC**, or **BCC** fields contains any of the addresses or domains. Type all the addresses and domains on a single line to search for items in which they are all present. Place the minus sign (-) in front of an address or domain to exclude it from the search. To exclude multiple addresses or domains, type them all on a single line. You must exclude wildcard characters when entering email addresses or domains. Specify inputs without wildcard characters, such as ***user@domain.com***, ***arctera.io***, ***gmail.com***, etc. Note: You can use **Freeform email addresses / domains** to search for email addresses associated with the user accounts but now use the discontinued domain. To search for previously monitored employees, you should use **department internal AND/OR External to organization** message route, and then use the **Freeform email addresses / domains** option to provide email addresses or domains.
Department tree	Specify the departments and employees you want to include in the search. Click the arrows to the left of the department names to expand them and view the nested departments and exception employees. When you select a department, you do not automatically include any exception employees in the department. To search exception employees, you must select each one explicitly.

8 In the **Search terms** section, specify the relevant information in the following fields.

This section specifies the words or phrases for which Veritas Surveillance should search in the subject lines of items and their bodies. By default, when you search for words in both the subject of an item and its content, Veritas Surveillance finds those items that meet one or both criteria. However, it is possible to set up Veritas Surveillance so that only those items that meet both criteria are found.

Subject	Type the keywords or phrases to be searched in the review items either in their subject lines or in the file names of their attachments. Press **Enter** to separate keywords and phrases from each other.

Alternatively, click **Hotwords** to select hotword sets and keywords.

Note:

- Use an asterisk (*) wildcard to represent zero or more characters in your search. However, an asterisk between the characters of a word is not supported.

  For example, the search terms such as ***mismanag****, ***paint* the tape***, ***can * switch to***, and ***ring * * blink***, are supported and the search terms such as ***Ga*s*** or ***In*a*** are not supported.
- 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 Veritas Surveillance.

  For example, the search terms such as ***saniti?ed***, ***"massive favo?r"***, and ***Indi?*** are supported.
- Use a minus sign (-) to indicate you want to exclude from the search results any items that contain the following word or phrase.

  For example, the search to find the items that contain either of the words Agent and Agency, but do not contain the word Cost. ("(Agent AND NOT Cost) OR (Agency AND NOT Cost)"):

  Any of: Agent -Cost

  Agency - Cost
- 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 you want to appear in the search results.
- A search term cannot start with any of the following characters on any line: = + - @. For example, "Agent -Cost" is a valid search term but "-Cost Agent" is not.
- Veritas Surveillance does not allow any non-alphanumeric characters in the search term, except asterisk (*), question mark (?), and minus sign (-) as these characters have a special significance.

Content	Specify the keywords or phrases to be searched in the content of review items. Alternatively, click **Hotwords** to select hotword sets and keywords. **Note:** ■ Use an asterisk (*) wildcard to represent zero or more characters in your search. However, an asterisk between the characters of a word is not supported. For example, the search terms such as ***mismanag****, ***paint* the tape***, ***can * switch to***, and ***ring * * blink***, are supported and the search terms such as ***Ga*s*** or ***In*a*** are not supported. ■ 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 Veritas Surveillance. For example, the search terms such as ***saniti?ed***, ***"massive favo?r"***, and ***Indi?*** are supported. ■ Use a minus sign (-) to indicate you want to exclude from the search results any items that contain the following word or phrase. For example, the search to find the items that contain either of the words Agent and Agency, but do not contain the word Cost. ("(Agent AND NOT Cost) OR (Agency AND NOT Cost)"): Any of: Agent -Cost Agency - Cost ■ 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 you want to appear in the search results. ■ A search term cannot start with any of the following characters on any line: = + - @. For example, "Agent -Cost" is a valid search term but "-Cost Agent" is not. ■ Veritas Surveillance does not allow any non-alphanumeric characters in the search term, except asterisk (*), question mark (?), and minus sign (-) as these characters have a special significance.

9 In the **Attachments** section, specify the relevant information in the following fields.

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

Number	Specify the required number of attachments. You can search the items with specific number and type of attachments. The default option, **Does not matter**, means that the item can have zero or more attachments. All following other options require you to type one or two values that specify the required number of attachments: ■ **Equals**: requires a specific number of attachments. ■ **Between**: requires the number of attachments messages must have to a value between those to be specified. ■ **Less than**: requires a number of attachments below the number specified. ■ **Greater than**: requires any number of attachments greater than the number specified.
File extensions	Specify 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.

10 In the **Miscellaneous** section, specify the relevant information in the following fields.

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

Message size	Specify the size in kilobytes of each item of configured and enabled content sources. The item size includes the size of attachments as well. The following options are available: ■ **Does not matter**: any number from 0 upward can be attached. ■ **Equals**: requires a specific number of attachments. ■ **Between**: requires the number of attachments messages must have to a value between those to be specified. ■ **Less than**: requires a number of attachments below the number specified. ■ **Greater than**: requires any number of attachments greater than the number specified.

Message type	Displays a list of configured and enabled content sources for the customer. Select the **All content sources** check box to consider messages from all types of content sources simultaneously. When this option is selected, other options remain disabled. To select specific message type, clear the **All content sources** check box, and select one or more required options from the content sources available in the list.

11 In the **Tags** section, specify the relevant information in the following fields.

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

Filter	Select any of the following options to search for the items that match certain classification policies. There are several types of policies: ■ **Inclusions only**: Select this option to include items that your policy management software has classified for inclusion in the review set that may contain the most serious offenses, such as swearing, racism, or insider trading. ■ **Ignore inclusions**: Select this option to ignore items that Veritas Classification has classified for inclusion in the review set that may contain the most serious offenses, such as swearing, racism, or insider trading. ■ **Exclusions only**: Select this option to include spam items and newsletters that your policy management software may classify for exclusion from the review set. ■ **Ignore exclusions**: Select this option to ignore spam items and newsletters that your policy management software may classify for exclusion from the review set. ■ **Categories only**: Select this option to include categorized 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. ■ **Ignore inclusions and exclusions**: Select this option to ignore inclusion and exclusion items. ■ **Custom**: Select this option and type the names of one or more policies. Separate multiple tag names with commas, like this: CustomTag1,CustomTag2 ■ **All**: Select this option to include all tags. **Note**: Veritas Classification is required to classify items based on their content and metadata. Implementing Veritas Classification requires additional charges.

Name	Select tag names. Separate multiple tag names with commas, like this: CustomTag1,CustomTag2
Filter by current department	Select this check box to skip the unused policies in the current department.

12 In the **Intelligent Review** section, choose options for the learning engine in Veritas Surveillance. This engine allows Veritas Surveillance to search for items intelligently, based on the actions that reviewers have taken on earlier items.

For example, after a reviewer has marked a spam message or out-of-office reply as irrelevant then, when Veritas Surveillance detects other items that have similar characteristics, it can handle them in the same way.

Note: Searches that use the intelligent review feature may take slightly longer to complete than those that do not use this feature.

Searches, by default, consider metadata and content of items to determine the relevance. However, if search results contain items that are older than 30 days, only metadata is considered to determine the relevance.

The options for **Learning behavior** are as follows:

None	Veritas Surveillance searches for items in the normal way, without implementing Intelligent Review. This is the default option.
Search and prioritize	Veritas Surveillance searches for both relevant items and irrelevant items without favoring one over the other. So, if your chosen **Sampling percentage value requires that you capture and review 10% of items**, Veritas Surveillance captures 10% - but a substantial number of the items may be irrelevant. With this option, however, Veritas Surveillance does give the items a status of either **Unreviewed (Irrelevant)** or **Unreviewed (Relevant)** as it adds them to the review set. When you later review the items in the **Review** pane, you can filter them by their **Unreviewed** status to distinguish between the relevant and irrelevant items.
Search and then sample ONLY relevant content	Veritas Surveillance searches across all the items and captures the relevant ones only, until it has captured the required percentage. So, if your chosen **Sampling percentage value requires that you capture and review 10% of items**, Veritas Surveillance captures 10% - all of them considered to be relevant. If there are too few relevant items to fulfil the chosen sampling percentage, Veritas Surveillance does not supplement them with irrelevant items. This is an important difference between this option and the equivalent option, Sample exact percentage of ONLY relevant content, in the **Department Properties** pane.

13 Click **Save**.

Disabling scheduled searches

You cannot delete a search schedule if any scheduled search is linked to it. You need to disable scheduled searches so that you can delete their search schedules.

To disable scheduled searches

1. In the left navigation pane, click **Departments**.
2. Search for and select the department for which you want to disable the scheduled search.
3. Click the **Searches** tab. A list of searches appears.
4. Select the search you want to modify, and then click the **Edit Search** icon. The **Edit Search** dialog box appears.
5. In the **Search Type** section, change the **Search Schedule** to either another search schedule or **None**. If you have changed it to **None**, then clear the **Schedule run start date** and **Schedule run end date** fields.
6. Click **Save**.

Previewing search results

Veritas Surveillance makes it easy for a reviewer to preview the search results before accepting or rejecting them and deciding if the search is based on their expectations and if it needs to modify search criteria. The **Search Preview** feature is available for the immediate or scheduled searches that are complete, but the search acceptance is pending.

Note: Veritas Surveillance does not support previewing certain file types, such as ***.dll*** and **.exe** and large files (over 10MB to maintain browser responsiveness). For compressed files, Veritas Surveillance supports previewing only the ***.zip*** file format and does not support other formats like ***.7z***, ***.tar***, and so on.

To preview the search results

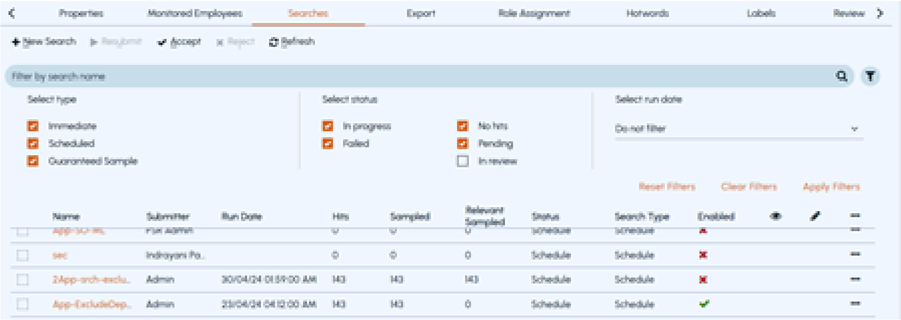
1. In the left navigation pane, click **Department**.
2. Search for and select the department to view the associated searches.

   Note: Veritas Surveillance lists all departments. You can use the filtering options to search for the required department. Options include filtering by department name, exception employees, and reviewers associated with the department.

   ---

3 Click **Searches**. A list of search results is displayed.

Enter the desired value in the text field and click the **Search** icon to view the searched items , or the **Clear** icon to remove the value from the search field. To filter the searched items, click the **Filter** icon.



All the emails, Teams chats, and the Teams Channels items are displayed. You can identify these items easily as the icons are different. A **Preview Search** icon is displayed for the searches whose acceptance is pending and for the scheduled searches as shown in the sample image above.

4 To preview the *immediate* and *scheduled*searches with the **Pending Acceptance** status, click the **Preview Search** icon. The search items are displayed in a new browser window.

5 To preview the *schedule* search, click the **Search Runs** (...) button for the desired scheduled search. To preview the desired scheduled search with the **Pending Acceptance** status, click the **Preview Search** icon. The search items are displayed in a new browser window as shown in the sample image below.

Accepting search results

Veritas Surveillance does not add the captured items to the review set until you accept the search results. If you did not select **Automatically accept search results** in the search type section, you must manually accept the results.

To accept a search result

1. In the left navigation pane, click **Department**.
2. Search for and select the department to view associated searches.

   Note: Veritas Surveillance lists all departments. You can use the filtering options to search the required department. Options include filtering by department name, exception employees, and reviewers associated with the department.

3. Click **Searches**, and then filter and select a search name you want to accept.

   Note:

4. Click **Accept**.

   The application displays **Accepted** state in the **Status** column.

Rejecting a search result

Note: An accepted search cannot be rejected.

To reject a search result

1. In the left navigation pane, click **Department**.
2. Search for and select the department to view associated searches.

   Note: Veritas Surveillance lists all departments. You can use the filtering options to search the required department. Options include filtering by department name, exception employees, and reviewers associated with the department.

3. Click **Searches**, and then filter and select a search name you want to reject.

   Note: To set a filter criterion to find a search, click the **Filter** icon. Select the required filter parameters, and then click **Apply Filters**.

4 Click **Reject**.

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

5 Click **Reject**.

The application displays the **Create New Search** dialog box for modification.

6 Click **Cancel**.

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

7 Click **Discard** to complete the operation or click **Cancel** to cancel it.

Resubmitting a search

You can monitor the status of all Veritas Surveillance searches. You can review the search criteria to ensure that it matches the desired query. If any of the criteria is incorrect, modify it and resubmit the search. You can do this even if you do not normally have access to the departments with which the searches are associated. However, you cannot view the search criteria or the results of the searches unless you normally have access permission.

Note: You must have the *Monitor Search* permission to resubmit searches. By default, users that have the *Compliance System Admin* role have this permission.

To resubmit a search criterion

1 In the left navigation pane, click **Monitor**.

2 Filter and select a search name you want to resubmit.

Note: To set a filter criterion to find a search, click the **Filter** icon. Select the required filter parameters, and then click **Apply Filters**.

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3 Click **Resubmit**.

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

4 Click **Resubmit** to complete the operation or click **Cancel** to cancel it.

Chapter 5

Managing reviews

This chapter includes the following topics:

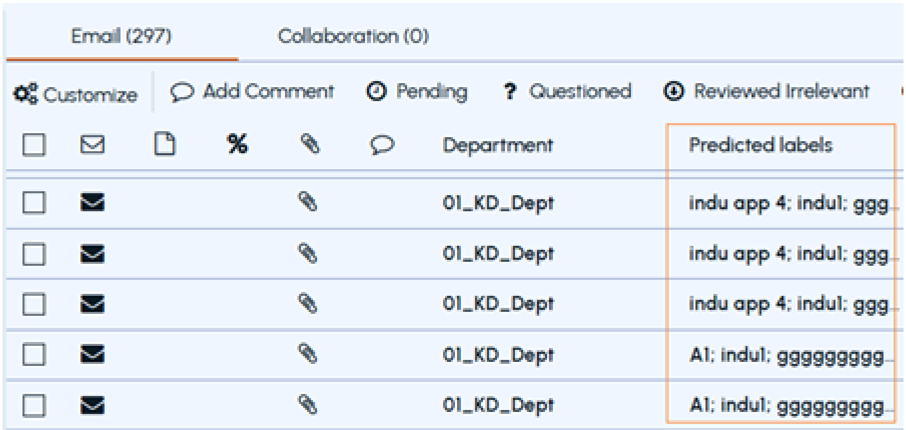
About reviewing with Veritas Surveillance

Veritas Surveillance simplifies the compliance assessment process for reviewers by allowing them to review the outcomes of random sampling and searches. Furthermore, the compliance review process is facilitated by the following key aspects:

- **Distinct reviewer roles**: Veritas Surveillance has several predefined reviewing roles, such as *Escalation reviewer*, *Exception reviewer*, and *Passive reviewer* that possess the following characteristics:
  - **Passive reviewers** can view items and review history, but they cannot assign or change review status. However, passive reviewers can assign appraisal status to the items that other users have reviewed.
  - **Exception reviewers** can view the items of their assigned exception employees only.
  - **Escalation reviewers** can receive items that other reviewers in the department have escalated to a higher authority for further review.
  - All roles except the *Passive Reviewer* role permit a user to assign the pending, question, escalation, and appraisal status to the review items.
  - All the exception reviewers and escalation reviewers assigned to the departments can assess the review status and comments that reviewers have applied and add appraisal status and comments.
- **Filter pane**: This pane lets you set criteria to refine the search records in the review items grid.
- **Comments**: Reviewers can comment on the review items to promotes documentation and transparency, facilitates collaboration and communication, supports auditing and accountability, enables effective risk management, and contributes to continuous improvement in the compliance review process.
- **Labels, label groups, and their AI-based predictions**: Reviewers can assign labels, label groups, and single choice label groups to review items. If the AI-based label predictions option is enabled for labels or single choice label groups, only 20 active labels (including single choice group labels) per department or at application level can be enabled for AI predictions. To enable AI-based label predictions, labels and single choice label groups must be marked as active and the **Enable AI Predictions** option must be selected.

  Deactivated labels and label groups are not considered for analysis and AI-based label predictions.

  The *Predicted labels* column is displayed in the items grid on the **Review** page as shown in the sample image below. If multiple labels are predicted, they are separated by semicolon.



- **Tags and hotwords statistics**: Veritas Surveillance provides tags and hotword statistics for all message types it supports. Reviewers can quickly view the tags and hotwords-specific statistics per item and can navigate to individual matches in the **Preview** pane.
- **Review items grid customization**: Veritas Surveillance lets you set the **Preview** pane position to the bottom or the right side of the review items grid for better readability. It also allows you to rearrange columns of the grid according to your specific requirements. You can sort the resulted reviewing items by increasing or decreasing relevance score, tags, and so on. You can collapse and expand the panes for better readability.
- **Relevance Score**: This score is an integer value ranging from 0 to 100, assigned to all review items. It indicates the degree of relevance for review. A lower relevance score suggests that the item is more irrelevant, while a higher score indicates that the item is more relevant and requires closer attention during the review process. This functionality enables reviewers to promptly prioritize items for review, focusing on the most relevant ones first.

  The Relevance Score column is displayed in the list pane by default. The score is calculated and displayed only if the Intelligent Review service is enabled for the selected departments. For the departments that are not enabled for the intelligent review service, the application displays the column, but the values remain blank.

Understanding the Review page

The following image highlights the standard features of the **Review** page.

1. Summary and instruction pane

This page displays the summarized information of review items. You can click the summary items to view the details.

2. Filter pane

Veritas Surveillance lists only those departments for which the reviewers have access. Reviewers can use the filter facets to set criteria to refine the search records. You can collapse this pane for better readability as and when required.

See "Filtering the items in the Review pane" on page 45.

3. Review item grid

This grid shows the items in the review set that match the filter options you have selected. You can use the **Group** drop-down list to group or sort the items according to relevance, ascending or descending dates and months, alphabetical author and subject names, and tags. The unreviewed items are displayed in bold text.

Click on the column heading to sort items in ascending or descending order. The changes are persisted across different login sessions for the logged-in user.

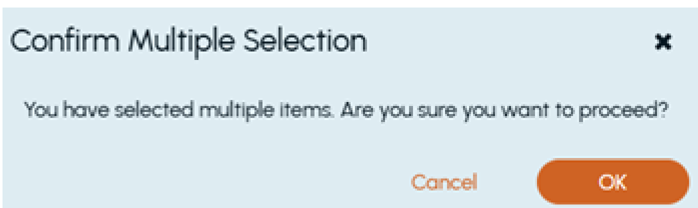
4. Footer area

This area provides the navigation arrows at the bottom of the items grid to go to the first, previous, next, or last page.

5. Action bar

The action bar lets you perform the following actions:

- Apply review statuses and add comments to single or multiple selected items. When applying a review status to a single item, the application does not prompt to confirm the selection of the item. However, while applying a review status to multiple items, the application prompts a confirmation to ensure accurate selection and avoid errors, as shown in the sample image below.



- Rearrange the column order for improved review experience. See "Rearranging columns in the item list pane" on page 52.

- Change the position of the reading pane (Preview, Comments, and History) to right or bottom of item list pane. See "Changing the Preview pane position" on page 45.

6. Reading pane

This pane has three tabs and two functions.

- The **Preview** tab displays an HTML preview of the selected item.
- The **Comments** tab shows the comments that reviewers have assigned to the selected item.
- The **Kebab** icon (three vertical dots) provides the **Print** option to view the printable version of the item, and the **Download** option to save the printed file to your computer.

This pane has the following sections:

- **Tags**: This section shows the classification policy tags-specific statistics when a user selects an email for review.
  The displayed information includes tag names. Next to each entry, the number of incidents that match the corresponding tags in the selected items is shown. After you expand the tag name node, the application displays the number of matches in the top-level content of the email and in each attachment of the email.
  This section displays statistics only for the tags that have a match. Tags that do not match are not shown in the list.
  The **Top Level** node and the attachments nodes are visible only if the content within them contains the specified tags. In case there are no matches for the tags in the primary emails, the **Top Level** node will not be displayed. Similarly, if there are no matches for the tags in the attachments, those attachments will also not be displayed.
  You can click the hyperlinks to view the respective tags in the **Preview** pane. Click the arrows to navigate to the next or previous match. The navigation is limited to the content of email body message and attachments, and not within the email metadata.
- **Hotwords**: This section shows the hotwords-specific statistics when a user selects an email for review.
  The displayed information includes the names of hotwords sets and individual hotwords. Next to each entry, the number of incidents that match the corresponding hotwords or hotwords sets in the selected items is shown. After you expand the hotwords set name, the application displays the included hotwords and their number of matches in the top-level content of the email and in each attachment of the email.

This section displays statistics only for hotwords or hotword sets that have a match. Hotwords and hotword sets that do not match are not shown in the list.

The **Top Level** node and the attachments nodes are visible only if the content within them contains the specified hotwords. In case there are no matches for the hotwords in the primary emails, the **Top Level** node will not be displayed. Similarly, if there are no matches for the hotwords in the attachments, those attachments will also not be displayed.

You can click the hyperlinks to view the respective hotwords in the **Preview** pane. Click the arrows to navigate to the next or previous match. The navigation is limited to the content of email body message and attachments, and not within the email metadata.

Changing the Preview pane position

To change the Preview pane position

1. In the left navigation pane, click **Review**.
2. Click the **Preview** drop down and select any of the following options:
   - Select **Right** to preview content on right side of the item list pane.
   - Select **Bottom** to preview content on bottom side of the item list pane.

   This setting is saved and remains persistent until changed.

Filtering the items in the Review pane

The search and filter options available in the **Review** pane provide several parameters to filter items for review.

To filter the items in the review pane

1. In the left navigation pane, click **Review**.
2. In the **Department** drop-down list, do the following steps:

   Note: The selections are persisted across all login sessions for the logged-in user.

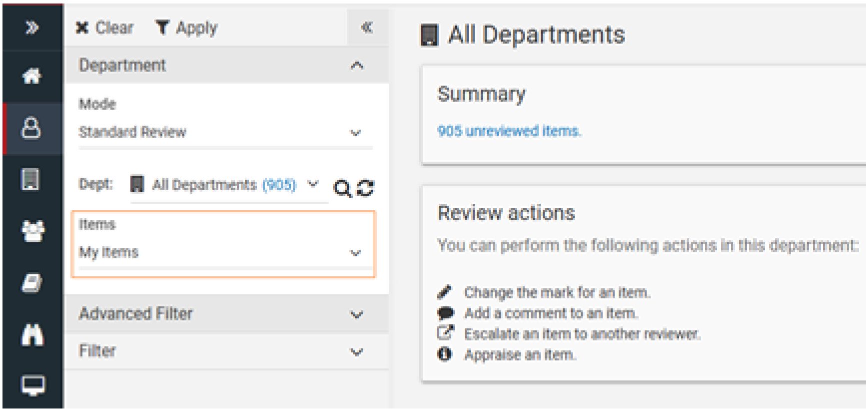
   - In the **Mode** drop-down list, choose whether to perform a standard review of the items in the review set or an escalation review.

Note: Escalation Review mode is available to escalation reviewers only. It lets these reviewers view and change review status of the items that other reviewers have escalated to them for further attention.

- In the **Items** drop-down list, select a group of items you want to review. The following options are available:
  - **Temporary Assignment**: This option allows you to temporarily reserve a predefined number of unassigned items from the review set for your current session. These items are not permanently assigned to you, but while your session is active, other reviewers cannot access or review them.

    For example, if you log in and select **Temporary Assignment** with a limit of 200 unassigned items, you can review these items without permanently assigning them to yourself. While your session is active, other reviewers in the department cannot see or access these items. However, once you log out or end the session, any unmarked items become available again for other reviewers.
  - **All Items**: This option allows you to view all review items in the review set, including those assigned to other reviewers. However, using this option may lead to duplicate work if multiple reviewers mark the same items.

    For example, if you select **All Items**, you can view every item in the review set, including those assigned to other reviewers. However, if you mark these items, you may duplicate the work of others, leading to inconsistencies. To prevent this, use this option only for browsing these items and not reviewing them.
  - **My Items**: This option displays only when the **Standard Review** mode is selected. It does not appear when the **Escalation mode** is selected. When you click **Apply**, it shows the items that are explicitly assigned to you according to the review assignment criteria configured for the department. Refer to the sample image below.



For example, if 30 out of 100 items collected via searches and any sampling method are assigned to you, only those 30 items will appear for you. You cannot view items assigned to other reviewers of the department.

3 In the **Advanced Filter** drop-down list, specify the following if needed to filter review items.

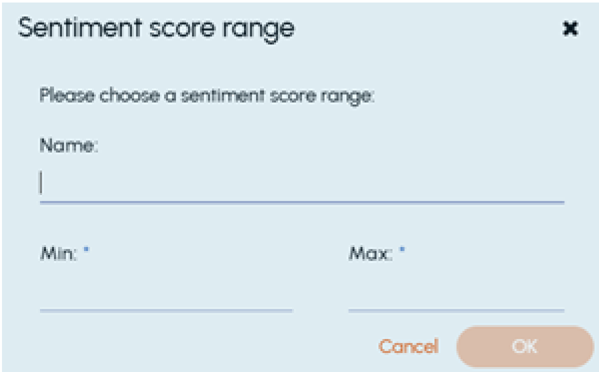
4 In the **Filter** drop-down, do any of the following as required:

- Choose the filter criteria from the default **Preset** options. By default, the following preset options are available:
  - All Unreviewed
  - Today's Unreviewed
  - All Unreviewed Exchange
  - All Unreviewed Instant Messaging
  - All Unreviewed Bloomberg
  - All Unreviewed Domino
  - All Messages
- Expand the necessary facets and select the item classification options you want to apply.
  If you want to use the same facet settings frequently, you can save this setting as a filter preset option. In the **Preset** drop-down, select **Custom**, then click the **+** icon next to the drop-down arrow. In the **Save preset as** field, enter a unique name of the filter preset, and click **OK**.
  Upon successful addition, the newly saved filter preset appears in the **Preset** drop-down.

The following table lists the available filter facets.

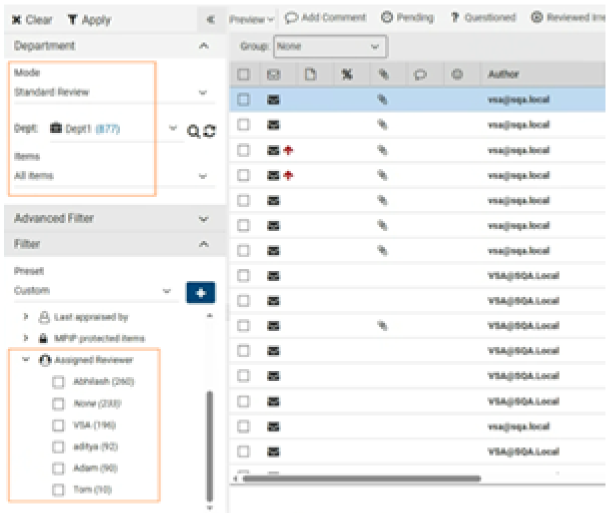
Facets	Description
Status	Select items by their status, like pending, reviewed, questioned, and so on.
Capture date	Selects items that Veritas Surveillance has captured over the specified period. The default options are - Today, Yesterday, Last 7 days, Last 14 days, and Last 28 days. Click **Set date range** to filter the items based on the date range specified. Clicking the calendar icon displays the review item count beneath the date, month, and year wise view. When selected, the application also displays day-wise, month-wise, and year-wise item counts beneath the respective dates, months, and years. If there is no items count, a hyphen (-) is displayed. For more details,
Date	Select items by the date on which they were created. The default options are - Today, Yesterday, and Last week. The last week defines Monday to Sunday range of the last week. You can use this option to review weekly items. When you hover over the Last week option, you can view the last week Monday to Sunday date range. For example, if you are working on 18th Nov 2021, the last week dates are displayed as 8th Nov 2021 to 14th Nov 2021. Click **Set date range** to filter the items based on the date range specified. Clicking the calendar icon displays the review item count beneath the date, month, and year wise view. When selected, the application also displays day-wise, month-wise, and year-wise item counts beneath the respective dates, months, and years. If there is no items count, a hyphen (-) is displayed. For more details

Facets	Description
Search	Select items that one or more searches have captured. If there are more than 20 items, the application displays the **Show all** option. To view all the items, click **Show all** and select maximum 20 items. To select multiple items, select the corresponding check boxes. You can select items from multiple pages. You can use the **Go to page** field to select the available page number you want to view. Else, the application displays the message as ***Invalid page***. The total of selected items is displayed in the bottom. To remove entire selection, click the **Clear** icon. To remove any of the selected items, click on the link (which is adjacent to the **Clear** icon), search for the employee record, and click the **Remove** icon.
Scheduled search	Select items that one or more searches have captured according to their search schedules.
Author	Select items by the name of the person who sent them.
Escalation status	Select items by whether they have been escalated to an escalation reviewer or subsequently closed by that reviewer.
Appraisal status	Select items by their appraisal status.
Type	Select one or more supported message types. For more information on the Veritas Surveillance supported message types, The available options are displayed based on the services subscribed and enabled for you. For example - ■ If MS Teams Archiving is enabled for you, the *Teams Chat* and *Teams Channel* options are available for filtering. ■ If the search result has audio or video items, then the *Audio-Video Transcript* option is available for filtering.
Direction	Select items that have traveled in the specified direction. The options are as follows: ■ **Not specified** - Select to avoid choosing any direction. ■ **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.

Facets	Description
Labels	Select items by their labels.
Tags	Select items by their tags.
Tags action	Select items by their tag actions.
Sentiment score	Select items based on the predefined sentiment score categories. A score in the range of 0 to 100 is assigned, where... ■ 0 - 39 indicates that the item expresses the negative sentiment. ■ 40 - 59 indicates that the item represents the neutral sentiment. ■ 60 - 100 indicates that the item represents the positive sentiment. To customize a different sentiment score range and use it as a preset later, click **New sentiment score range**. Specify the minimum and maximum score you want to capture, and provide a unique name to this preset. Click **OK** to save the preset as shown in the sample image below. 
Last marked by	Select items by the person who has lastly changed a review status of the items.
Comments	Select items to which reviewers have added comments.
Size	Select items by their size in kilobytes.
Number of attachments	Select items by the number of attachments that they have.

Facets	Description
Capture method	Select items by the method that Veritas Surveillance has used to capture them and add them to the review set. The options are: ■ **Not specified** - Select to avoid choosing any direction. ■ **Search** - Select to choose items that have been captured as a result of searches. ■ **Random Sampling** - Select to choose items that Veritas Surveillance has captured and added to the review set according to your designated monitoring policy. ■ **Guaranteed Sample Search** - Select to choose the results of guaranteed sample searches. ■ **Tags** - Select to choose items that Veritas Surveillance has captured and added to the review set according to designated tags.
Escalation owner	Select items by the escalation reviewer who has responsibility for them.
Escalated by	Select items by the person who escalated them to an escalation reviewer for further attention.
Last appraised by	Select items by the person who appraised the items.

Facets	Description
Assigned Reviewer	Select items by the assigned reviewer. It is recommended to use this filter in **Standard Review** mode with **All Items** selected from the **Items** drop-down list. Refer to the sample image below.



5 Click **Apply**.

Rearranging columns in the item list pane

To rearrange columns in the item list pane

1. In the left navigation pane, click **Review**.
2. To change the order of column to left or right in the item list pane, click the **Up** or **Down** arrows respectively, and click **Apply changes**.
3. To reset the default arrangement of columns, click **Reset to default**.

Reviewing the Audio-Video Transcript type items

To review the Audio-Video Transcript type items

1. Create a new search or select the search in which you want to search for the items containing the audio/video files.
2. In the left navigation pane, ensure that under **Filter** > **Type**, the **Audio-Video Transcript** option is displayed.

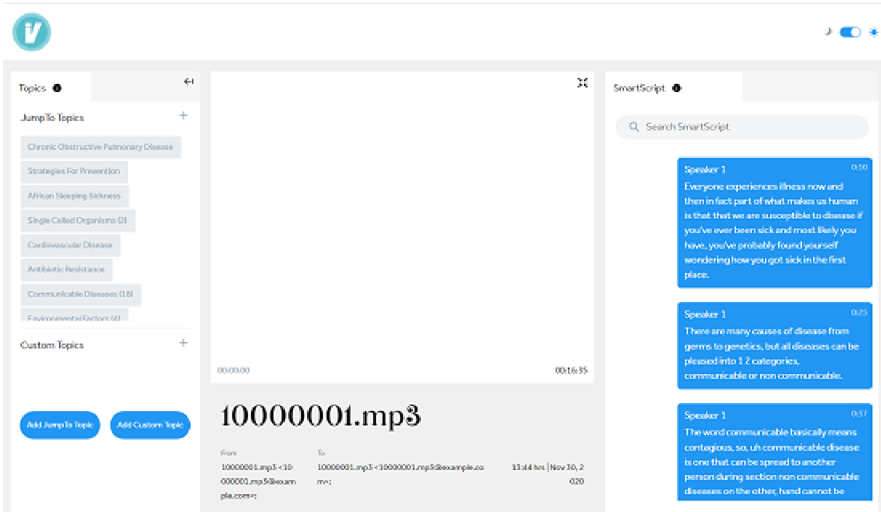
   Note: The **Audio-Video Transcript** option appears only if the searched items contain the audio or video files.

   ---

3. To view items containing the audio and video files, select the **Audio-Video Transcript** option and click **Apply**.
4. Select an individual item to view its details in the **Preview** pane.

   The attached audio and video files and corresponding transcript is displayed.
5. To review the attachment, download or open the attached audio and video files.
   - To download the audio or video attachment, hover over the attachment, and click the download icon. Alternatively, click the expand icon and select **Download**.
   - To open the selected attachment in the Google Chrome browser, click the expand icon and select **Preview**.

6 Play the audio or video and read the transcript to review the content. Refer to the sample image below:



In the **Topics** pane, click the topic you want to review. The corresponding audio or video starts from that topic. Click the plus icon to customize a new topic from the audio or video content.

In the **SmartScript** pane, review the text of the speakers.

7 Close the browser after review is done.

Reviewing searched items

To review items and checking their tags and hotwords statistics

1 In the left navigation pane, click **Review**.

2 Search for and select the department for which you want to review items.

Veritas Surveillance lists all departments for which you have the review permissions.

3 (Optional) Use **Advanced Filter** and **Filters** to view the precise review items quickly. To reset the filtering criteria, click **Clear**, set a new criterion, and click **Apply**.

The application displays items from the selected departments.

The item grid displays multiple columns. Based on your review priorities and focus, you can:

- Sort items by clicking the column headings.

  For example, to view more relevant items for review, click the **Relevance Score** column heading. Items with higher relevance scores are more relevant, while lower scores suggest irrelevance.
- Rearrange the column sequence. See "Rearranging columns in the item list pane" on page 52.
- Use the navigation arrows at the bottom of the items grid to go to the first, previous, next, or last page.

These changes are persisted across different login sessions for the logged-in user.

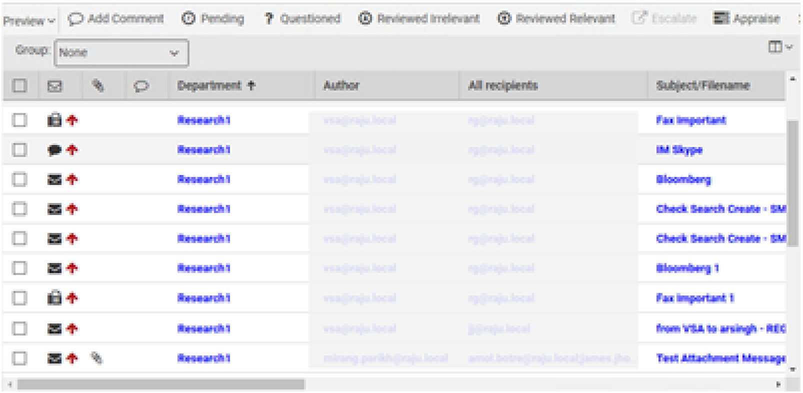
Note: The **Relevance Score** column is displayed in the list pane by default. However, the score (value) is calculated and displayed only if the intelligent review service is enabled for the selected departments. For the departments that are not enabled for the intelligent review service, the application displays the column, but the values remain blank.

Reviewing research folder items

Before you proceed, ensure you have the *Review* permission to proceed with this task.

If a research folder contains items, the application provides a **Go To Review** option to display a research folder in the **Review** pane. This enables you to access research folder items for review more efficiently. If a research folder has no items, the option remains disabled.

Note: In the **Review** pane, items of the research folders are displayed in *blue* to distinguish them from review set items. Refer to the sample image below.



While reviewing the items, you can:

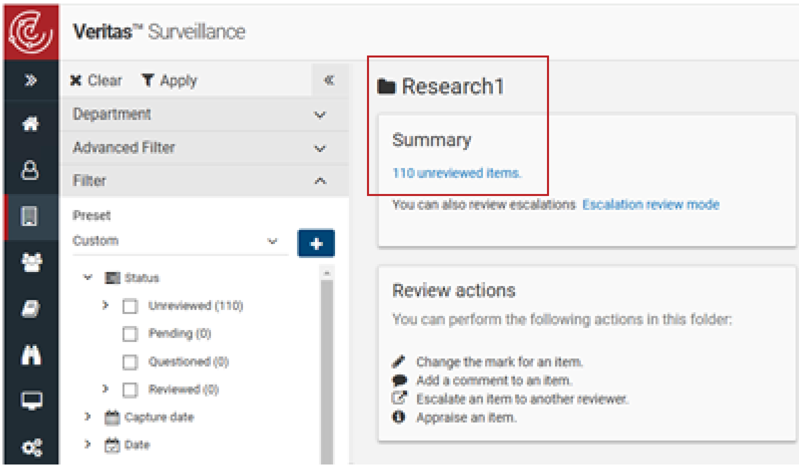
- add comments to the items.
- assign status marks to the items.
- escalate and appraise items
- mark all items from author of the selected item and mark all items in the set
- commit items from research folder to other folders.
- copy items from research folder to other folders.
- remove items from research folder if these items are no longer required.

To review research folder items

1. In the left navigation pane, click **Departments**.
2. Expand the **Departments** section if it is not expanded by default, and do any of the following:
   - Click **All Research Folders**. Search for and select the research folder.
   - Expand the relevant parent department. Search for and select the research folder.

3 Click **Go To Review**.

The application opens the selected folder in the **Review** pane. Click the link in the *Summary* section to view unreviewed items as shown in the sample image below.



Items in a research folder can be reviewed the same way as those in the review set. You can add comments and assign status marks. Status marks can be applied to individual items, items from a specific author, or all items at once.

4 To add comments, select the required items and click **Add Comment**.

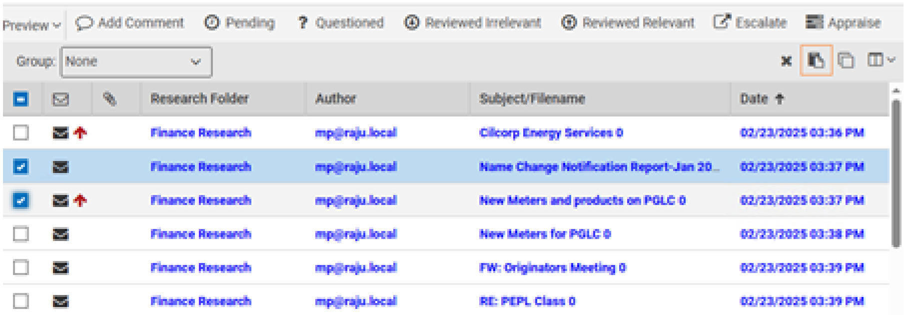
In the **Add Comment** pop-up, either click a relevant comment from the available options (only one comment can be selected) or enter a new comment. Then, click **OK**.

5 To assign status marks, select the required items and choose the appropriate option from the following:

- Click **Pending** or press `Alt+P` to mark the items as pending for review.
- Click **Questioned** or press `Alt+Q` to mark the items as questioned to raise a query.
- Click **Reviewed Irrelevant** or press `Alt+I` to mark the items as compliance irrelevant.
- Click **Reviewed Relevant** or press `Alt+R` to mark the items as compliance relevant.
- Click **Escalate** or press `Alt+E` to mark the items as escalated.

- Click **Appraise** or press `Alt+P` to appraise the work of department reviewers and manage any exception employees in the department.

6 To commit research folder items to the department, select one or more items, and click the **Commit** icon.



Note: The *Commit* function is available only in the research folder and enables you to commit items along with review marks, appraisal marks, and comments to the parent department.

Note: Before proceeding, ensure you have the *Commit Appraised Folder Messages* or *Commit Reviewed Folder Messages* permission, depending on the item type you want to commit. By default, users with the *Full Control* or *Commit Messages* role have these permissions.

You cannot commit items with an *Unreviewed* status. Only marked items are eligible for commitment to the department. Once committed, items retain all applied review marks, appraisal marks, and comments.

In the **Commit items from research folder to department** dialog box, do the following:

Commit

Review Marks	Select this check box to retain the review marks applied to the items being committed.
Appraisal Marks	Select this check box to retain the appraisal marks applied to the items being committed.
Comments	Select this check box to retain the comments added to the items being committed.

Items

Selected items	Select this option to commit only the selected items.

All of the items in the folder	Select this option to commit all the items available in the selected research folder.
Remove items after commit	Select this check box to remove items from the selected research folder upon committing them to the department.

Click **Commit** to complete the task.

7 To copy items to another research folder of the same department, select one or more items, and click the **Copy** icon.

The *Copy* function is available in both the department and research folder and enables you to copy items along with review marks, appraisal marks, and comments either:

- From a department to a child folder.
- From one folder to another within the same department.

In the **Copy items to research folder** dialog box, do the following:

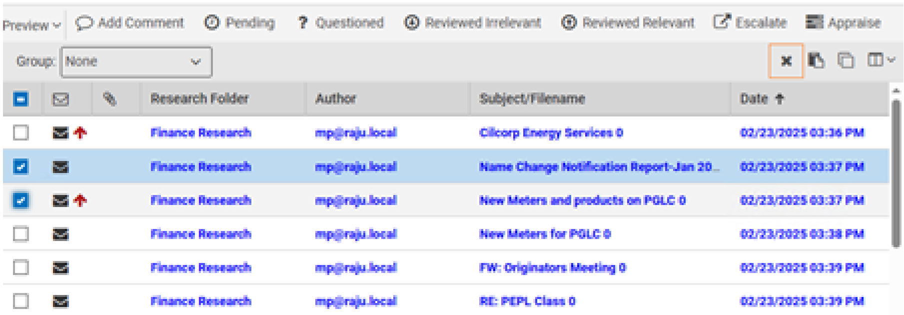
Destination Folder	Do any of the following as required: ■ Expand the drop-down list to select an existing research folder from the same department. ■ Enter a unique name to create a new destination folder within the department.
Selected items	Select this option to copy the selected items from the selected research folder to another research folder of the same department.
All of the items in the folder	Select this option to copy all the items available in the selected research folder to another research folder of the same department.
Remove items after copy (move)	Select this check box to remove items from the selected research folder upon copying (moving) them to the destination folder.

Click **Copy** to complete the task.

Note: If you copy multiple items from different departments using the **All Departments** filter, the application displays a separate pop-up for each department, prompting you to select a destination folder and provide other required inputs.

---

8 To remove items from research folder, select one or more items, and click the **Remove** icon.



- To select multiple adjacent items, hold down *Shift* and click the first and last item in the range.
- To select multiple non-adjacent items, hold down *Ctrl* and click each required item.

In the **Remove items from research folder** dialog box, choose if you want to remove only selected items or all the items available in the selected research folder. Then, click **Remove** to complete the task.

Viewing Intelligent Review Details

The **Intelligent Review Details** section provides the facts of why the item is classified as *Unreviewed Relevant* or *Unreviewed Irrelevant*. It shows the **Relevant** and **Irrelevant** labels (links) and the respective contribution.

During review, the **Intelligent Review Details** section appears on the **Preview** tab only if the departments you want to review are enabled for Intelligent Review, and the *Show Intelligent Review Details in Review* permission is enabled for the logged-in user. This permission is by default enabled for the *Department Reviewer, Escalation Reviewer, Compliance Supervisor, Exception Reviewer, and Passive Reviewer* roles, where either the *Review Messages* or the *Review Escalations* permissions are enabled. By default, Intelligent Review Details section is collapsed. Users can expand and collapse it as required.

The total relevant and irrelevant contribution value is shown besides the respective labels. These values (between 0 to 100) are factor of relevant and irrelevant contributions found inside the item. When you click the Relevant and Irrelevant labels, the corresponding details appear which shows the factors that have contributed towards relevant or irrelevant. The calculated values of a contribution of each factor are mentioned so that a reviewer can understand the reason behind the item being relevant or irrelevant.

If the contribution value of the relevant factors is more than the contribution value of the irrelevant factors, the item will have higher relevance score (greater than 50). If the contribution value of the irrelevant factors is more than the contribution value of the relevant factors, the item will have lower relevance score (less than 50). If the contribution values of the relevant and irrelevant factors are almost similar, the item will have the relevance score around 50.

The factors that contribute are Author, Recipient, Subject, Content, Direction, Tags, and Department influence. Department Influence shows the extent to which prediction is inclined in favor of or against the marking based on the department's learning. If reviewers in a department favor marking items as irrelevant, then Department Influence will contribute towards irrelevance and vice versa. If factors do not have values, they can still contribute as relevant or irrelevant. It happens when the algorithm weighs the lack of details (such as the presence of zero tags or absence of content) as a contributing factor to its learning.

If the contribution of any factor is insignificant, but not absolutely zero (0), then value can be rounded to and displayed as zero (0). If the factor does not contribute at all, then this factor is not displayed. The amount of contribution of each factor is also shown with the color legend.

Refer to the sample images below.

Figure 5-1 Preview pane showing the IR details, hit highlighting, managing text for learning, and AI-predicted labels

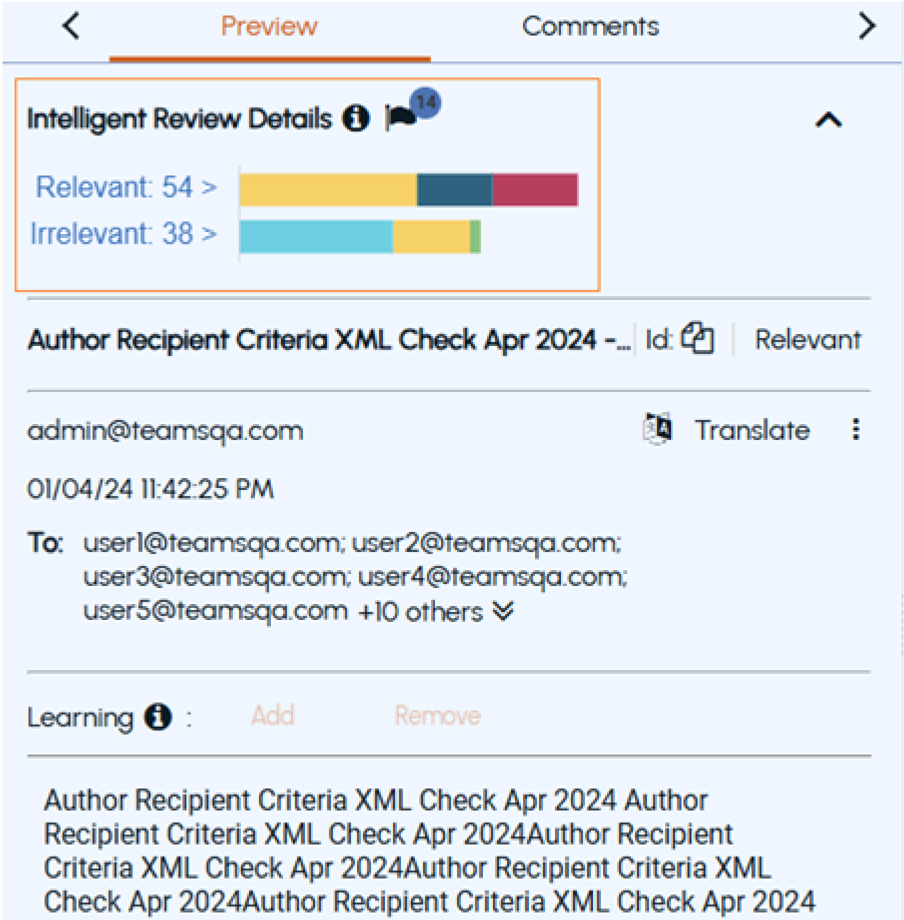
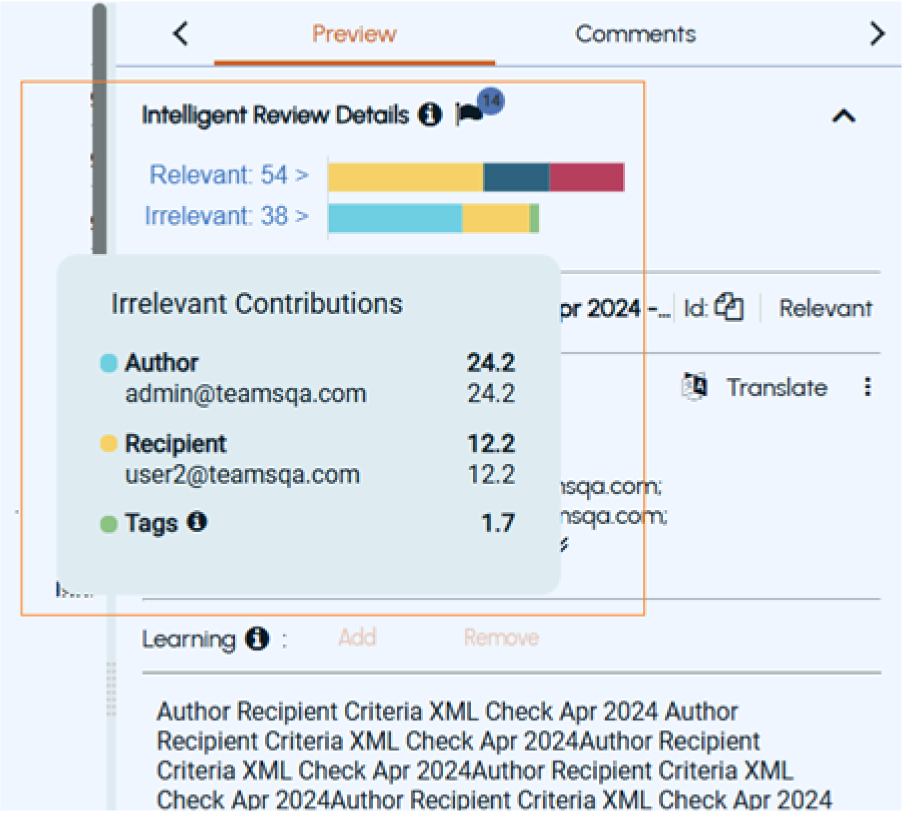


Figure 5-2 Contributing factors and their contribution



Following are some circumstances when the Intelligent Review Details are not available, and the application displays different messages for users.

Circumstance	Displayed message
Item is not processed by the Intelligent Review engine	Details not available
Data for machine learning is inadequate	Intelligent Review is still learning. Details are not yet available.
Technical problem during loading Intelligent Review Details	Error loading Intelligent Review Details

Assigning review status to items

As part of the review process, you can assign a review status 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.

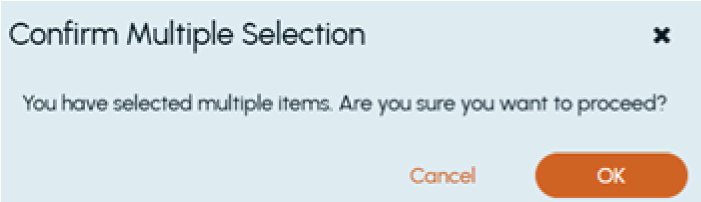
To assign a review mark to an item

1. In the left navigation pane, click **Review**.
2. Filter the items in the review pane.

   See "Filtering the items in the Review pane" on page 45.
3. Click **Apply**.

   The application displays a list of review items from the selected departments.
4. During manual review, select one or more items to which you want to assign a review status.

   When applying a review status to a single item, the application does not prompt to confirm the selection of the item. However, while applying a review status to multiple items, the application prompts a confirmation to ensure accurate selection and avoid errors, as shown in the sample image below.

5.
   - Select **Pending** to keep the items pending for review.
     The key combination Alt+P typically assigns the **Pending** mark to an item.
   - Select **Questioned** to raise query on the items.
     The key combination Alt+Q typically assigns the **Questioned** mark to an item.
   - Select **Reviewed Irrelevant** to apply the compliance irrelevant mark to the selected items.
     The key combination Alt+I typically assigns the **Reviewed Irrelevant** mark to an item.
   - Select **Reviewed Relevant** to apply the compliance relevant mark to the selected items.

The key combination Alt+R typically assigns the **Reviewed Relevant** mark to an item.

- Select **Escalated** to escalate the items to the escalated reviewer for further attention.

  The key combination Alt+E typically assigns the **Escalated** mark to an item.

- Select **Appraised** to appraise the work of department reviewers and manage any exception employees in the department.

  The key combination Alt+A typically assigns the **Appraised** mark to an item.

Viewing hotwords highlighting

Veritas Surveillance provides the option to highlight keywords in a hotword set that are added as search terms. Highlighting applies to subject and body content and an HTML preview of an attachment. See "Creating and running department-level searches" on page 24.

A search with a hotword returns the exact matches only. When an asterisk character is used with the hotword, the search returns items with partial matches also. For example, two hotwords, "code" and "codebreaker," are available. A search with "code" returns items where "code" is present as an independent word. A search with "code*" returns all items that contain "codebreaker" as well as items that contain only the "code" keyword.

To view highlighted hotwords of an item

1. In the left navigation pane, click **Review**.
2. Search for and select the department for which you want to review items.

   Note: Veritas Surveillance lists all departments. You can use the filtering options to search the required department. Options include filtering by department name, exception employees, and reviewers associated with the department.

   ---

3. (Optional) To reset the filtering criteria, click **Clear**, and set a new criterion.

4 Click **Apply**.

The application displays emails and collaboration messages from the selected departments.

Note: If only the **Exchange** service is enabled for you, then only emails are displayed. If the MS Teams Archiving service is enabled for you, then collaboration messages are also displayed.

---

5 During the manual review, select the item to view its details in the **Preview** pane.

6 Navigate across the hits for a phrase, all hotwords, or a specific hotword.

Note: Highlighting navigation control is shown only if at least one hotword or a tag is applied to the review item.

The hotwords and the tags are highlighted in the **Preview** pane of emails and collaboration messages. However, the navigation option to go to the next or previous hotword or a tag is available only for emails, and not for collaboration messages.

Note: Highlighting navigation control is shown only if a hotword set was added to the review item.

---

7 In the **Preview** pane, click the drop-down arrow to view a list of hotwords and phrases.

Note: The application lets you review maximum hotword instance in the content by highlighting them. Therefore, when any search is based on multiple hotwords and phrases, and if any word or a fragment of a phrase is common among the hotwords and phrases, the improved hit-highlighting feature displays that word or a phrase as a separate hotword in the drop-down list.

For example, the ***Ramayana*** word is a part of phrase - ***The Ramayana is an ancient***. In this case, the hit-highlighting feature provides you the hotword options like ***Ramayana***, ***The Ramayana***, and ***The Ramayana is an ancient*** as the word Ramayana is common in all instances.

You can select **All** to highlight all the hotwords. Else, you can select a specific hotword from the list that you want to get highlighted for review.

Note that multiple negative hotwords are excluded from hit highlighting.

---

8. Select the required hotword in the list to get it highlighted in the content.

   Hover over the hotword instance to view the search that is applied to the review item.

9. Click the Next arrow icon to view the next highlighted hotword instance. To view the previous instance of highlighted hotword, click the Previous arrow icon.

10. (Optional) Preview an attachment content and navigate across the hits for all hotwords or a specific hotword.

Viewing hotwords in collaboration message

Veritas Surveillance provides the option to highlight keywords in a hotwords set that are added as search terms. Highlighting applies to message content only. See "Creating and running department-level searches" on page 24.

If the collaboration message contains the hotwords and tagged instances, the hotwords are highlighted in yellow color and the tags are highlighted in green color.

A search with a hotword returns the exact matches only. When an asterisk character is used with the hotword, the search returns items with partial matches also. For example, two hotwords, "code" and "codebreaker," are available. A search with "code" returns items where "code" is present as an independent word. A search with "code*" returns all items that contain "codebreaker" as well as items that contain only the "code" keyword.

To view highlighted hotwords in a collaboration message

1. In the left navigation pane, click **Review**.
2. Search for and select the department for which you want to review items.

   Note: Veritas Surveillance lists all departments. You can use the filtering options to search the required department. Options include filtering by department name, exception employees, and reviewers associated with the department.

   ---

3. (Optional) To reset the filtering criteria, click **Clear**, and set a new criterion.
4. Click **Apply**.

   The application displays emails and collaboration messages from the selected departments.

5 Select a Teams Chat or Channel item to view its details in the **Preview** pane.

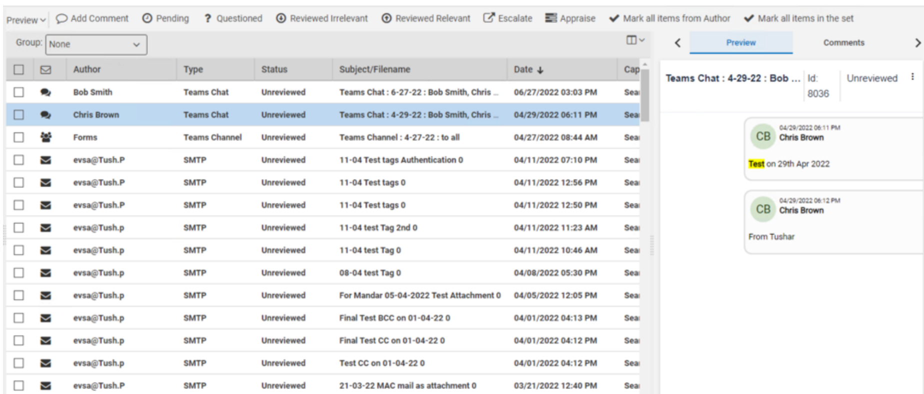
Note: If the search applied to the item has configured with hotwords, these hotwords are shown in the Preview pane and are highlighted in yellow color. However, highlighting is shown only if at least one hotword is applied to the review item.

---

6 To view all highlighted hotwords, click the **Kebab** icon.

To view older chat messages, click **Scroll On** and then scroll up or down to scan through the messages.

7 To view the search that is applied to the review item, hover over the hotword instance.



Viewing the full content in a new window

Veritas Surveillance provides an option to double-click on emails to view their content in a new browser window and navigate to the next and previous items from the current page. However, you cannot double-click on collaboration messages to view their content in a new browser.

To view the full content of an item

1. In the left navigation pane, click **Review**.
2. Search for and select the department for which you want to review items.

   Note: Veritas Surveillance lists all departments. You can use the filtering options to search for the required department. Options include filtering by department name, exception employees, and reviewers associated with the department.

   ---

3. (Optional) To reset the filtering criteria, click **Clear**, and set a new criterion.
4. Click **Apply**.

   The application displays a list of review items from the selected departments.
5. During the manual review, select an email and double-click on a corresponding row to view its content in a new window.

   Note: Double-clicking an item to view its content in a new browser is supported for emails only, and not for collaboration messages.

Adding comments to items

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

To add comments to an item

1. In the left navigation pane, click **Review**.
2. Filter the items in the review pane.

   See "Filtering the items in the Review pane" on page 45.
3. Click **Apply**.

   The application displays emails and collaboration messages from the selected departments.

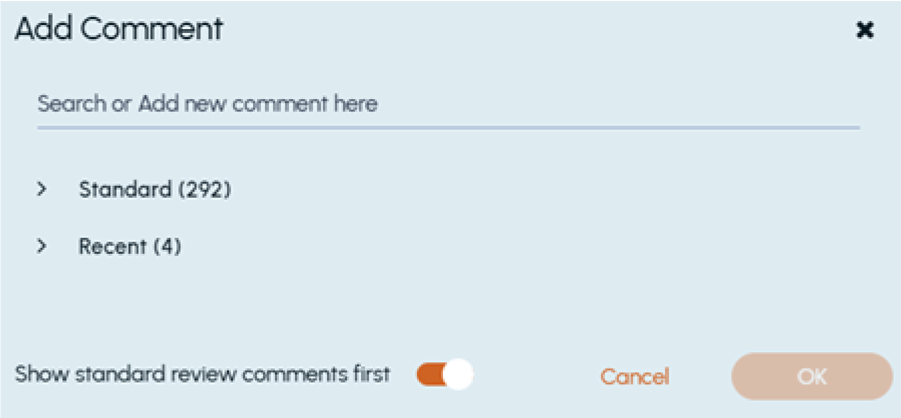
   Note: If only the **Exchange** service is enabled for you, then only emails are displayed. If the MS Teams Archiving service is enabled for you, then collaboration messages are also displayed.

   ---

4 During manual review, select the item to view its details in the **Preview** pane.

5 Click **Add Comment**.

Alternatively, use the Alt+T shortcut key to add comments to an item. The **Add Comment** dialog box appears.



6 Expand the **Standard** or **Recent** comments group, and select a relevant predefined comment, depending on your permission level.

If you do not find a relevant predefined comment, enter a new comment for the item.

Note: To view the Standard review comments first always, enable the **Show standard review comments first** option.

---

7 Click **OK**.

The item is marked with the comment symbol.

A comment indicator is displayed 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.

Escalating the review items

Like adding comments to the review items (emails and collaboration messages), you can escalate the review items to an individual reviewer or a group of escalation reviewers.

To escalate a review item

1 In the left navigation pane, click **Review**.

2 Search for and select the department and the item you want to escalate from that department.

   See "Filtering the items in the Review pane" on page 45.

3 View the details in the **Preview** pane.

4 On the action bar, click **Escalate**.

   The **Select an Escalation Reviewer** dialog box appears.

The department name appears in the first drop-down field.

5 In the **Select an Escalation Reviewer** drop-down, select an individual reviewer or an escalation reviewers group to whom you want to escalate the review item.

Selecting an escalation reviewers group is beneficial, as any member can review escalated items, whereas an individual reviewer's absence may cause delays.

6 Under **Add Comments**, expand the **Standard** or **Recent** comments group, and select a relevant predefined comment, depending on your permission level.

If you do not find a relevant predefined comment, enter a new comment for the item.

Note: To view the Standard review comments first always, enable the **Show standard review comments first** option.

---

7 Click **OK**.

The item is marked with the escalation symbol.

After an item is escalated, you can view the selected escalation reviewer or escalation reviewer group in the **Escalation Owner** column of the items grid, within the **History** pane of the item, and in the **Escalation Reviewer** facet under **Filters**.

Viewing history of items

Veritas Surveillance 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.

You must have the *Review Messages* permission to view the history of items. By default, all reviewers and supervisors have this permission.

To view the history of an item

1 In the left navigation pane, click **Review**.

2 Filter the items in the review pane.

See “Filtering the items in the Review pane” on page 45.

3 Click **Apply**.

The application displays a list of review items from the selected departments.

4. During manual review, select the item to view its history details in the reading pane.
5. In the reading pane, click **History**.

   The following details appear as shown in the sample image below:

- The subject, date, and details of the sender and recipients.
- The item type, such as Microsoft Exchange or Bloomberg, and its direction (Internal, External Inbound, or External Outbound).
- The department in which Veritas Surveillance has captured the item.
- Capture date and method by which the item was captured.
- The event history, tag actions history, the X-Header history, IR marking and labels history of the item.

Printing the original versions of items

You must have the *Review Messages* permission to print items. By default, all reviewers and supervisors have this permission.

To print the original versions of an item

1. In the left navigation pane, click **Review**.
2. Filter the items in the review pane.

   See "Filtering the items in the Review pane" on page 45.
3. Click **Apply**.

   The application displays a list of review items from the selected departments.
4. In the reading pane's **Preview** tab, click the ellipses in the upper-right corner to display more options, and then select **Print**.

   The **Print** dialog box appears.
5. Select the format and location to save the file at your accessible location.

Printing and downloading the items and attachments

Besides the HTML-rendered view of the items in the **Preview** pane, you can print and download the item in its original form. The downloaded items exclude audit-specific information, like reviewer comments. To obtain the item and its audit information, you need to export the item.

Note: Veritas Surveillance does not support previewing certain file types, such as ***.dll*** and **.exe** and large files (over 10MB to maintain browser responsiveness). For compressed files, Veritas Surveillance supports previewing only the ***.zip*** file format and does not support other formats like ***.7z***, ***.tar***, and so on.

You must possess the *Review Messages* permission to download items. By default, all reviewers and supervisors have this permission.

To print and download the item and attachment

1. In the left navigation pane, click **Review**.
2. Filter the items in the review pane. See "Filtering the items in the Review pane" on page 45.

   In the items grid, a list of review items from the selected departments appears.
3. Select the review item in the items grid, and access the **Preview** tab as shown in the sample image below.

   Note: If you select multiple items, you cannot print or download these items simultaneously.

   ---
4. Do the following as required.
   - To download an attachment, hover over the attachment, and click the **Download** icon. The file is downloaded to a location based on your settings, mostly in the *Downloads* folder.
   - To download the original version of item, click the kebab icon and click **Download**.
   - To print the item, click the kebab icon and click **Print**.
     In the **Print** dialog box, ensure the correct file format and specify the location to save the file.