Enterprise Vault 12 Whitepaper

Best Practices for Enhanced Accelerator Reporting

This whitepaper describes the Enterprise Vault 12 and 12.1 Enhanced Reporting features and shows customers, partners, and service providers how to create their own Discovery Accelerator and Compliance Accelerator custom reports and dashboards.

If you have any feedback or questions about this document please email them to <u>ii-tfe@veritas.com</u>stating the document title.



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Revision History

Version	Date	Changes
1.0	June 2018	

Related Documents

Document Title	Version / Date



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Terminology

Term	Description
OData	Open Data Protocol
XML	eXtensible Markup Language
JSON	Java Script Object Notation
SSRS	SQL Server Reporting Services
Power Query	Excel Add-in used for accessing data from different sources, including OData
CA	Compliance Accelerator
DA	Discovery Accelerator
Dataset	A collection of data, normally associated with the contents of a database
	table
FINRA	Financial Industry Regulatory Authority, Inc.
SEC	Securities and Exchange Commission

Introduction

The Enterprise Vault 12 Enhanced Reporting feature allows Discovery Accelerator and Compliance Accelerator administrators the ability to create custom reports easily. Reporting requirements tend to vary widely, depending on the legal and compliance regulations. Enhanced Reporting addresses this need, allowing administrators to create their own custom reports using the OData (Open Data) protocol that exposes information from Discovery Accelerator and Compliance Accelerator datasets.

Discovery Accelerator (DA) is an electronic discovery and review system that integrates with Enterprise Vault and allows authorized users the ability to search, retrieve, preserve, review, mark, and export emails, and other electronic items in a cost-effective manner. Compliance Accelerator (CA) allows organizations to perform cost-effective supervisory review of their employees' communications to ensure compliance with regulatory bodies, such as FINRA and the SEC. Many Enterprise Vault customers may own one or both of these applications, depending on their legal and compliance requirements.

OData is an open data access protocol for the web that provides a uniform way to structure, query, and manipulate data. With OData, you access datasets by simply typing in a URL path. OData supports both XML and JSON (Java Script Object Notation) formats for storing and exchanging data. Although the OData protocol permits create, read, update and delete operations, Enhanced Reporting just allows the ability to read information from DA and CA datasets.

OData provides a simple way to allow any OData client to access information exposed by any OData data source. This whitepaper will show how to create custom reports using two OData clients, Excel Power Query and Microsoft SQL Reporting Services.

Benefits of Enhanced Reporting

- Prior versions of the Accelerator reporting framework used Microsoft SQL Server Reporting Services (SSRS). It was difficult to customize reports using this framework because details of the underlying Enterprise Vault database schema were unpublished and often changed from one release to another.
- Enhanced reporting addresses this limitation by exposing reporting data as an OData service, which allows administrators to create customized reports and dashboards easily.
- Enhanced reporting exposes CA and DA datasets and allows interoperability from any OData compatible reporting tool.



Architecture Overview



Figure 1 – Enhanced Reporting Architecture

Enterprise Vault 12 Enhanced Reporting includes the following components.

An OData client: This can be any OData aware client, including:

- Web browser
- Excel Power Query
- SSRS client.

The OData client communicates over http(s) protocol to perform the OData queries.

An OData web service: Internet Information Server (IIS) hosts the OData web service under the default, DA and CA web site. The web service runs under an Application pool identity. The OData web service uses .net remoting for communication with the Accelerator service. It performs the following functions: Exposes and allows retrieval of information from specific datasets.

- Validates input parameters
- Compiles information received from the Accelerator service in the form of Data Tables.
- Performs error handling and propagates the appropriate messages to the OData client.

Installation and Configuration

The installation of Discovery Accelerator or Compliance Accelerator includes a Reporting web service. Uninstalling DA or CA will remove the CAReporting and DAReporting web server from IIS and the corresponding folders and files.

Install Path				
CA <acceleratorinstallpath>\CAReport</acceleratorinstallpath>	ing			
DA <acceleratorinstallpath>\DAReport</acceleratorinstallpath>	ing			

Table 1 – Installation Location Folder



Figure 2 – CAReporting Website in IIS

Configuring SSL for the DA and CA Web Reporting Service

To configure https for the CAReporting and DAReporting web service URL, you need to configure SSL on IIS.

Steps to configure:

- Create an SSL certificate with a hostname or Fully Qualified Domain Name (FQDN) of the CA or DA server. (For details, see How to create and install an SSL certificate:_ <u>https://support.microsoft.com/en-us/kb/228991</u>
- 2. Import the SSL certificate through MMC (refer to the article above for details)
- 3. Install and bind the SSL certificate to the webserver.



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B G CAIR2 H O CAIR2 H O Contract	AET AET net.top 000* tot Madee key Pope and Providers Controls Controls	View Applications View Virtual Directories
B → Custome1 B → ENSAdown B → ENComplance37	Seison Stale SMIP E-mol Add Skel tiedlog Add Skel tiedlog	Manage Web Site 🔿 🔅 Restart 🕨 Start 🛢 Stop
	IIS Type: P address: Part Protos P Altinassgned P 443 Cose Cose Cose Cose Cose Cose Cose Cose	Browse *100 (http) Browse *100 (http) Browse *1443 (https)
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	Logna HBH Types Mod	Configure Failed Request Tracing Limits
	Management	rep Craine Help
	Configuration Editor Permissions	

Figure 3 - Install and bind SSL certificate

Set SSL setting at CA or DA Reporting web directory.



Figure 4 - SSL setting

Permissions

In order to fetch or query information from the datasets, the "View Reports" permission is required on a DA Case or a CA Department. The DA Case Owner and the CA Department Owner have this permission assigned by default.



Creating a Role to View Reports

To create a Case or Department role with View Reports permission in either CA or DA, perform the following steps:

- 1. Select the Application tab and then click Role
- 2. Select New Role. Provide a Role Name e.g. "Reporting"
- 3. Select Permission "View Reports" and click "Save"

Note: The process for creating a new role in CA and DA is identical. The only difference is within CA, the Scope field would indicate Department, instead of Case.

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	User				Name	Reporting					
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	Folder Full Contro	Aamin									
	Folder Capture Me	essages			Scope	Case					Ŧ
	Folder Review										
	Test Role				Permission	s					
	Case Admin							Allow	Deny		*
	Reviewer				Perform	Ad Hoc Search	es				
					Product	ion					
					Review						
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					View Re	ports					
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Connec	ted to: DA_Cust1	Service state	ıs: 🥑 🔒	ev\vaultadmin							VERITAS

Figure 5 – Creating a Role with View Reports Permissions

Assigning a Role in DA

To assign the Reporting Role to a User within DA, perform the following steps:

- 1. Select Cases
- 2. Select a specific Case and click "Role Assignment"
- 3. Click Add User to select the user and click OK.
- 4. Select the "**Reporting**" role you previously created and click **OK**.
- 5. Click Save



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Employee Discrimination	Bill Davis - EV\bdavis	🚳 Veritas	Enterprise V	ault Discovery Accel	erator 12 📃 🗖 🗙	
 Fraud Investigation HR Issue SEC Audit 	 Henry Dillon - EV\hdillon John Harpar - EV\jharper 	Roles				
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Figure 6 – Assigning the Reporting role to a DA User

Assigning a Role in CA

To assign the Reporting Role to a User within CA, perform the following steps:

- 6. Select Departments
- 7. Select a specific Department and click "Role Assignment"
- 8. Click Add User to select the user and click OK.
- 9. Select the "Reporting" role you previously created and click OK.
- 10. Click Save



Veritas Enterprise Vault Compliance Accelerator 12					_ 🗆 X	
Home Review Research	Departments Employees Repo	orts Monitor	Application Co	nfiguration		2
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		Department Revie	ewer			
		Escalation Review	/er			
		Reporting				
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Figure 7 – Assigning the Reporting role to a CA User



Discovery Accelerator and Compliance Accelerator Datasets

Listed below are the 32 DA and CA datasets. Enterprise Vault 12.1 adds five new datasets. These are identified at the bottom of the table with an * beside their name. To learn more about the new datasets in EV12.1, please refer to the section in this white paper entitled, <u>Understanding the 12.1 CA and DA</u> <u>Datasets</u> and <u>Appendix B: 12.1 Datasets</u>. EV12.1 also introduced a **totalCount** parameter. This parameter provides a count of all records within the dataset and allows consumers of OData reports to adequately provision for the data requested. We recommend limiting a dataset request to about 100,000 records. Datasets supporting the **totalCount** parameter have a **#** beside their name in **Table 2**.

Discovery Accelerator	Compliance Accelerator
Cases	ActionStatusDetail
CaseHistory	Customers
Customers	Departments
ExportRunDuplicates #	EscalationHistory
LegalHoldArchives	ReviewerActivityByDepartment
LegalHolds	ReviewerActivityDetail
LegalHoldSearches	ReviewActivitySummary
SearchDetails	ReviewerActivityItemDetailed #
Searches	ReviewerActivityByReviewer
ProductionRun #	ReviewerActivityByDepartmentDetailed #
ProductionRunDuplicates #	DifferentialSamplingSummaryByDepartment
Productions	ReviewerNotes
UserRolesAndPermissions	QuestionedItemsByDepartment #
SearchCriteria *	ItemAgingByDepartment
ItemDetails # *	SamplingSummary *
	GuaranteedSamplingSummary *
	StatisticalSamplingSummary *

Table 2 – DA and CA Datasets - * = additional 12.1 datasets. # = datasets supporting the totalCount parameter

Figure 8 shows the total count for the ItemDetails dataset using the totalCount=true parameter. The syntax is

http://DAServername/DAReporting/OData/ItemDetails(customerID=1,totalCount=true)



Figure 8 – ItemsDetails dataset with the totalCount=true parameter



NextLink

There is also enhanced support for pagination with the EV 12.1 CA and DA datasets. Business Intelligence tools can now return the entire dataset, as opposed to having to use the startFrom and recordsPerFetch parameters, which were required, prior to EV12.1, and required manually constructing the URL to fetch the next set of data.

Viewing the Datasets

To view the Discovery Accelerator or Compliance Accelerator dataset names from a web browser, simply type in the following URLs:

http://DAservername/DAReporting/OData

http://CAservername/CAReporting/OData.

If prompted, click **Open** and select a web browser, (e.g. Internet Explorer) to view the file.

Figure 9 – A partial view the DA Datasets from a Web Browser

Dataset Fields

It is helpful to review and become familiar with the dataset fields within each dataset. This will help you determine what fields and datasets you would like to include within a specific report. A description of each dataset field is included in <u>Appendix A</u> and <u>Appendix B</u> of this document. To see the associated fields for each DA or CA Dataset enter the following:

http://DAservername/DAReporting/OData/\$metadata http://CAservername/CAReporting/OData/\$metadata.



xml version="1.0" encoding="UTF-8"?
- <edmx:edmx version="1.0" xmlns:edmx="http://schemas.microsoft.com/ado/2007/06/edmx"></edmx:edmx>
- <edmx:dataservices <="" p="" xmlns:m="http://schemas.microsoft.com/ado/2007/08/dataservices/metadata"></edmx:dataservices>
m:MaxDataServiceVersion="3.0" m:DataServiceVersion="3.0">
- <schema <="" p="" xmlns="http://schemas.microsoft.com/ado/2009/11/edm"></schema>
Namespace="EnterpriseVault.Reporting.DiscoveryAccelerator">
 - <entitytype name="CaseHistory"></entitytype>
<property name="CustomerID" nullable="false" type="Edm.Int32"></property>
<property name="CaseID" nullable="false" type="Edm.Int32"></property>
<property name="CaseName" type="Edm.String"></property>
<property name="TotalItemsInCase" nullable="false" type="Edm.Int32"></property>
<property name="ItemsProduced" nullable="false" type="Edm.Int32"></property>
<property name="CreatedDate" nullable="false" type="Edm.DateTime"></property>
<property name="LegalHoldStatus" type="Edm.String"></property>
<property name="ItemsUnReviewed" nullable="false" type="Edm.Int32"></property>
<pre><property name="ItemsReviewed" nullable="false" type="Edm.Int32"></property></pre>
<property name="ItemsQuestioned" nullable="false" type="Edm.Int32"></property>
<property name="ItemsPending" nullable="false" type="Edm.Int32"></property>
<property name="ItemsAssigned" nullable="false" type="Edm.Int32"></property>
<property name="ItemsUnassigned" nullable="false" type="Edm.Int32"></property>

Figure 10 – A partial view of the DA Dataset Fields

Accelerator Databases

Discovery Accelerator and Compliance Accelerator implementations include a configuration database and customer database(s). The configuration database contains information about the customer databases created. There is only one configuration database per DA/CA installation. However, DA and CA can contain one or more customer databases.

The Discovery Accelerator customer database(s) include details of cases, user roles, search results, and more. For Compliance Accelerator, the customer database(s) store details of departments, user roles, reviewer history, etc. In order to read the DA and CA datasets for information, a customerID is required.

Determining the customerID

If the customerID is unknown, the following commands for DA and CA provide a list of Customer Database Names and their corresponding customerID.

http://<DAservername>/DAReporting/OData/Customers http://<CAservername>/CAReporting/OData/Customers

The table results below list two customer database names, DA_Cust1 and DA_Cust2. If we want to query the datasets for DA_Cust1, we would use a customerID value of 2. *The customerID is mandatory and must be included, when querying the remaining datasets.*

Custome	rID	CustomerNa	ame	DirectoryDNS	SQLServer	Database
	2	DA_Cust1		evserver1	SQL-AA-EVGroupL	DA_Cust1
	3	DA_Cust2		evserver1	SQL-AA-EVGroupL	DA_Cust2

 Table 3 – Customers Dataset showing corresponding customerID



Accessing the datasets via OData

OData Syntax

The OData URL path consists of:

- The service root
- A resource path
- Query options

In **Table 4**, Departments refers to the dataset queried. The dataset is in a CA customer database with a customerID value of 1. The query option of **?\$top=2** indicates that we will return the top 2 records within the Departments dataset. <u>Appendix B</u> of this document details additional query options.

Service Root	Resource Path	Query Options
http:// <caservername>/CAReporting/OData</caservername>	/Departments(customerID=1)	?\$top=2

Table 4 – OData Path

OData Query Examples

Listed below are several OData Query examples.

Discovery Accelerator Examples	Description
http://DAservername/DAReporting/OData/CaseHistory	Returns case history details of a case with an
(customerID=1,caseID=5)	ID of 5, associated with a customerdatabase
	ID of 1.
http://DAservername/DAReporting/OData/LegalHolds	Returns a summary report of legal holds
(customeriD=1)	associated with a customer database ID of 1.
http://DAservername/DAReporting/OData/Searches	Returns a summary of searches performed in
(customerID=1,caseID=5)	case 5, within customer database 1.

Table 5 – DA OData Examples

Compliance Accelerator Examples	Description
http://CAservername/CAReporting/OData/Customers	To retrieve information for the customer
(customerID=2)	with an ID of 2
http://CAservername/CAReporting/OData/Departments	To retrieve values from department 5.
(customerID=2,departmentId=5)	
http://CAservername/CAReporting/OData	To report on reviewer activity during a
/ReviewActivitySummary(customerID=2,departmentID=8	specific time frame
,dateFrom=2015-01-01,dateTo=2015-12-25)	

Table 6 – CA OData Examples



startFrom and recordsPerFetch

The startFrom and recordsPerFetch parameters are optional, but return records in batches. The Default value is 100,000. If the size of the records is more than 100,000, the query will fail to fetch the additional records. Listed below is an example using the startFrom and recordsPerFetch parameters to return 350,000 records from a production run. To return all 350,000 records you will need to run multiple queries, similar to the example below:

http://DAServerName/DAReporting/OData/ProductionRun(customerID=6,caseID=6)

The first query will return the first 100,000 records

http://DAServerName/DAReporting/OData/ProductionRun(customerID=6,caseID=6,startFrom=100001,re cordsPerFetch=100000)

This second query will return the records, 100,001-200,000

http://DAServerName/DAReporting/OData/ProductionRun(customerID=6,caseID=6,startFrom=200001,re cordsPerFetch=100000)

The third query will return the records, 200,001-300,000

http://DAServerName/DAReporting/OData/ProductionRun(customerID=6,caseID=6,startFrom=300001,re cordsPerFetch=100000)

The final query will return the records, 300,001-350,000

From the EV12.1 release, an Odata.nextLink property set in the result set will fetch the next batch of items, so that running multiple queries against a large record set will no longer be required.

For additional examples and use cases of OData Queries, please refer to the Discovery Accelerator and Compliance Accelerator product documentation and <u>Appendix B</u> of this document.

This white paper will now take you through several different examples of creating custom reports and dashboards using Microsoft Excel and Microsoft SQL Server Reporting Services.

Microsoft Excel Power Query

We will begin with examples using Microsoft Excel. Examples in this document use Microsoft Excel 2013. In order to access Enterprise Vault datasets using OData, you will need to install the free, Microsoft Power Query add-in. Power Query allows you to query and retrieve data across a number of different data sources, including OData, directly from within Excel. You can download the add-in from Microsoft via the following URL: https://www.microsoft.com/en-us/download/details.aspx?id=39379



Microsoft Excel Power Pivot

It is also useful to install the Microsoft PowerPivot Add-in for Excel.

To do so, follow the instructions below (the instructions assume that you are using Excel 2013):

- 1. Within Excel select the File tab and choose Options.
- 2. Choose Add-ins
- 3. In the Manage list, choose COM add-ins and select Go
- 4. Select Microsoft Office PowerPivot for Excel 2013 and click OK.

Once you install the PowerQuery and PowerPivot add-ins, you will see these menu options within Excel.



Figure 11 – Add-ins

Prior to creating our custom reporting examples, open a blank workbook within Excel right-click and rename the **Sheet1** Worksheet you have open to **DA Dashboard**. Click the plus sign in the bottom, left-hand corner of the screen to create the **Sheet2** Worksheet. Right-click and rename to **CA Dashboard**. Click on the **DA Dashboard** Worksheet, as this is where we will begin.



Figure 12 – Worksheets

Creating Enhanced Reports

Accessing OData Datasets from Excel

Highlight the Power Query tab. Select From Other Sources/From OData Feed

X	5	- 0-	÷				Book1	- Excel			
FILE	н	IOME	INSERT	PAGE LAY	OUT	FORMULAS	DATA	REVIEW	VIEW	POWER QUE	ERY
From Web	From File *	From Database	From • Azure •	From Other Sources •	Recent Sources *	From Table	Merge Apper	nd Show Pane	Launch Editor	Data Source Settings	Options
N16	2210813594	Get	External Da	S From Imp site	m ShareP ort data f	P <mark>oint List</mark> rom a Micros	oft SharePoint	Workbo	ok Queries	Se	ttings
1	A	В	с	Fro Imp	m OData oort data f	Feed rom an ODat	a feed.	н	1	J	1

Figure 13 – OData Feed



Type in: http://<DAservername>/DAReporting/OData or http://<CAservername>/CAReporting/OData,

depending on whether you want to access the DA or CA datasets. In this example, we will connect to DA.

	×	đ.
er the URL for an OData feed. :p://DA/DAReporting/OData		
	OK Cancel	

Figure 14 – OData URL

The first time you type in this command within Excel, you may see the following screen displayed.



Figure 15 – Unauthorized User

Click **Windows** and select the credential options you would like to use (In this example, select **Use my current credentials**) and click **Connect**.

	Access an OData feed
¢	🖲 http://da/DAReporting/OData
Anonymous	Use your Windows credentials to access this OData feed.
Windows	Use my current credentials Use alternate credentials
Basic	Userhame
Web API	Password
Marketplace key	Select which URL to apply these settings to:
Organizational account	 http://da http://da/DAReporting/OData
	Connect Cancel

Figure 16 – Windows Credentials



Once you connect, you will see a listing of datasets. In this case, we have chosen to query Discovery Accelerator. If you highlight the **Customers** dataset, you will see a listing of the customer database names and corresponding customerID for each database.

The customerID is important, as it is a *mandatory parameter* for accessing the other datasets. In the illustration below, Customer Database **DA_Cust1** has a customerID value of **2**. We will use the customerID value of 2 when querying the datasets contained within the DA_Cust1 database.

	Q	Customer	S			.[
Select multiple items		Preview down	loaded on Saturday,	December 12, 20	15	
Show All Show Selected [1]	A CO	CustomerID	CustomerName	DirectoryDNS	SQLServer	Database
http://DA//DAReporting/OData [13]			2 DA_Cust1	evserver1	SQL-AA-EVGroupL	DA_Cust1
- mitp://DAV/DANeporting/Obata [15]			3 DA_Cust2	evserver1	SQL-AA-EVGroupL	DA_Cust2

Figure 17 – Customers Dataset

If you select another dataset in this pane, you will receive a **(400) Bad Request (Invalid request format)** error. This is normal. It is because the remaining datasets require a customerID number in order to access the data within them.

Navigator			1
	P	CaseHistory	
Select multiple items Show All Show Selected [1] Multip://DA//DAReporting/OData [13]		Preview downloaded on Saturday, December 12, 2015 DataSource.Error: OData: Request failed: The remote server returned an error: (400) Bad Request. (Invalid request format.)	
CaseHistory Cases		Details: DataSourceKind=OData DataSourcePath=http://da/DAReporting/OData/CaseHistory	

Figure 18 – (400) Bad Request Error

Now that we have the customerID number, click **Cancel** to exit out of this screen and perform a new query.

Creating a Discovery Accelerator Dashboard

Adding a CaseHistory PivotChart&PivotTable



Highlight the Power Query Tab. Select From Other Sources/From OData Feed.

×	5	- 0-	÷			97 - 2X	Boo	ok1 - Excel					
FILE	Н	OME	INSERT	PAGE LAY	/OUT	FORMULAS	DATA	REVIEV	V	VIEW	POWER O	UERY	
From Web	From File *	From Databas	From e + Azure +	From Other Sources •	Recent Sources	From Table	Merge App	end St	now	Launch Editor	Data Source Settings	ce Opt	tions
N16	201235	Get	External Da	From Site	m ShareP oort data f	oint List rom a Micros	oft SharePoir	Wor nt	kbo	ok Queries		Setting	gs
1	A	В	c	From Imp	m OData oort data f	Feed rom an ODat	a feed.		Н	1	J		1

Figure 19 – OData Feed

In this example, type in the URL <u>http://DAServername/DAReporting/OData/CaseHistory(customerID=X)</u> to read the Discovery Accelerator CaseHistory dataset associated with the DA customer database. Replace **X** with your customerID. CaseHistory includes information such as the total number of items in a case, the total number of items assigned or not assigned, how many items reviewers have reviewed or not reviewed.

OData Feed	
Enter the URL for an OData feed.	
URL	
http://DA/DAReporting/OData/CaseHistory(customerID=2)	

Figure 20 – URL

Click OK.

Rename the query under **Query Settings** from **Query1** to something a more descriptive (e.g. CaseHistory).





Figure 21 – Enter Query Name

Ctrl-Click to select columns that are not required for the custom report and select Remove

Columns/Remove Columns.

Close & Load • Close	k R Pr	Refresh review • Query	Choose Columns Manage	Remove P Remove P Rows • mns Rows	rrors ▼ A↓ Sort	Split Column - By By Data Type: Any - Group By Use First Row As Headers - 1,2 Replace Values Transform	Merge Queries Append Queries Combine Binaries Combine
>		CustomerID 💌 CaseID 💌	CaseNam	er Columns use 💌	ItemsProduced	CreatedDate CreatedDate LegalHoldStatus	ItemsUnReviewed 💌
S	1	2 .	5 Employee Discrimination	29538	5	55 12/10/2015 9:32:27 PM On	17074
nen	2	2	6 Fraud Investigation	29380	34	41 12/10/2015 9:33:17 PM On	19300
9	3	2	7 HR Issue	29351	55	50 12/10/2015 9:34:08 PM On	20190
	4	2	8 SEC Audit	33351	121	15 12/10/2015 9:34:49 PM On	20519

Figure 22 – Remove Columns

Highlight all the remaining columns that contain numeric values and select Data Type/Whole Number.

File		Home Transform Ad	d Column View								
æ		Properties			Remove Duplicates	₽↓	J. w	Da	ata Type: Any 👻	🖫 Merge Queries	New Source 🕶
Close	6	Advanced Editor			隢 Remove Errors 👻	Z↓	Solit Group		Decimal Number	Append Querie	s 🔒 Recent Sources
Load *		Preview *	Columns Columns *	Rows * Rows *			Column * By	·	Currency	🔛 Combine Binari	es
Close		Query	Manage Columns	Red	uce Rows	Sort			Whole Number	Combine	New Query
		- CaseName	TotalltemsInCase 🔻	ItemsProduced	 ItemsUnReviewed 	ItemsR	eviewed 🔻 Iten	n	Date/Time	▼ ItemsAssigned	✓ ItemsUnassigned ▼
5	1	Employee Discrimination	29538	8 5	55 17074		9357		Date	1396 195	00 10038
uerie	2	Fraud Investigation	29380	0 34	41 19300		7633		Time	443 193	00 10080
ð	3	HR Issue	29351	1 55	50 20190		7603		Date/Time/Timezone	726 200	00 9351
	4	SEC Audit	33351	1 121	15 20519		10210		Duration	1215 205	00 12851

Figure 23 – Change the Data Type

Click Close & Load/Close & Load To...



Figure 24 – Close & Load

Select Only Create Connection.



Check Add this Data to the Data Model.

Click Load.

Load To	
Select how you want to view this data in	your workbook.
Only Create Connection	
Select where the data should be loaded.	
Select where the data should be loaded.	
Select where the data should be loaded. • New worksheet • Existing worksheet:	
Select where the data should be loaded. New worksheet Existing worksheet: \$N\$16	
Select where the data should be loaded. New worksheet: SN\$16 SN\$16	
Select where the data should be loaded. New worksheet:	
Select where the data should be loaded. New worksheet: SN\$16 Add this data to the Data Model	
Select where the data should be loaded. New worksheet: SN\$16 Add this data to the Data Model	

Figure 25 – Adding Query to Data Model

Under Workbook Queries, the CaseHistory query that we just created appears.



Figure 26 – Workbook Queries

Click Insert/Pivot Chart/Pivot Chart & Pivot Table.



Figure 27 – PivotChart & PivotTable



Click Use an External Data Source and select Choose Connection.

Create PivotTable	?	x
Choose the data that you want to analyze		
Select a table or range		
Table/Range:		1
Use an external data source		
Choose <u>C</u> onnection		
Connection name:		
Choose where you want the PivotTable report to be placed		
O <u>N</u> ew Worksheet		
Existing Worksheet		
Location: 'DA Dashboard'!\$N\$16		1
Choose whether you want to analyze multiple tables		
Add this data to the Data Model		
ОК	Car	ncel

Figure 28 – Choose Connection

Select Query - Case History and click Open.

Existing Connections	? X
Existing Connections Select a Connection or Table Connections Tables Show: All Connections Connections in this Workbook Connections in this Workbook Connection files on the Network <no connections="" found=""> Connection files on this computer <no connections="" found=""></no></no>	? X
Browse for More	Cancel

Figure 29 – Select Query



	Create PivotTable ? X							
Choose the data that you want to analyze								
○ <u>S</u> elect a table or range								
<u>T</u> able/Range:								
Use an external data	ita source							
Choose <u>C</u> oni	nection							
Connection na	ame: Query - CaseHistory							
Choose where you war	t the PivotTable report to be placed							
O <u>N</u> ew Worksheet								
Existing Workshee	et							
Location: 'D,	A Dashboard'!\$A\$1 🔣							
Choose whether you want to analyze multiple tables								
Add this data to the Data Model								
OK Cancel								

Figure 30 – Create PivotTable

Click OK.

Click on Chart1

On the far right of the screen under **PivotChart Fields** click **CaseName**.

PivotChart Fields
Choose fields to add to report:
∡ E CaseHistory ✓ CaseName
TotalltemsInCase
ItemsProduced
ItemsUnReviewed
ItemsReviewed
ItemsQuestioned
ItemsPending
ItemsAssigned
ItemsUnassigned

Figure 31 – PivotChart Fields

CaseName should now appear under AXIS (Categories).

■ AXIS (CATEGORIES)	
CaseName	-

Figure 32 – AXIS (CATEGORIES)



Select the remaining **PivotChart Fields**.



Figure 33 – PivotChart Fields

The remaining fields should now appear under the Values.

Σ VALUES	
Sum of Totallte 🔻	1
Sum of ItemsPr 🔻	
Sum of ItemsUn 🔻	
Sum of ItemsRe 🔻	
Sum of ItemsQ 🔻	
Sum of ItemsPe 🔻	-

Figure 34 – Values

Adjust the size of the chart and columns leaving the first four lines of the spreadsheet blank.





Figure 35 – CaseHistory Table and Chart

Right-click on CaseName and select Hide all field buttons in chart.

Grand Tota		Move <u>U</u> p
Sum of To		Move <u>D</u> own
40000 —		Move to Beginning
35000		Move to <u>E</u> nd
30000	Ψ	Move to Report Filter
25000	11	Move to Axis Fields (Categories)
20000	111	Move to Legend Fields (Series)
15000	Σ	Move to Values
10000		Hide Axis Field Buttons on Chart
5000		Hide All Field Buttons on Chart
0	×	Remove Field
	6	Field Settings
CaseName	*	The advancement of the second second

Figure 36 – Hide Field Buttons

The dashboard should now look like this.



Figure 37 – DA Dashboard



Adding a Legal Holds Chart

Now create another chart to add to this dashboard to show the number of Legal Holds per case.

Highlight the Power Query Tab. Select From Other Sources/From OData Feed

Enter http://DAservername/DAReporting/OData/LegalHolds(customerID=X) Replace X with your customerID.

Click OK.

Under Query Settings, rename the Query to Legal Holds.



Figure 38 – Query Name

There is a lot of information in this dataset that you may want to include within your reports, but in this example, we will remove all columns except CaseName and TotalItemsHeld by highlighting the remaining columns and selecting **Remove Columns/Remove Columns**.

File	н	ome Transform Ad	dd Column View						^ 6
Close & Load •	R	Advanced Editor	Choose Columns * Row	Remove Duplicates Remove Errors • Remove Frors •	Ž↓ Ž↓ Split Column → E	Data Type: Any • Use First Row As Headers • Use J ₂ Replace Values	Merge Queries Append Queries Combine Binaries	New Source -	
Close		Query	Manage 🔢 Remove Col	umns Rows	Sort	Transform	Combine	New Query	
		CustomerID 💌 CaseID	CaseNam Remove Oth	piD	▼ 1	otalltems 💌 LegalHoldState 💌	Reason	▼ LegalHoldStatus	▼ TotalltemsHeld ▼ TotalHo
10	1	2	5 Employee Discrimination	DA_DA_Cust1_F37FFEEB-AB5A-4D3	8D-8DA8-D0258BB22!	29538 On	Pending Litigation	Idle	29538
nen	2	2	6 Fraud Investigation	DA_DA_Cust1_9CC47EE9-7CAF-48B	37-8D47-07319FA324	29380 On	Active Litigation	Idle	29380
a	3	2	7 HR Issue	DA_DA_Cust1_DA9BD606-BE69-452	2F-B010-158CF4EE12	29351 On	Possible Litigation	Idle	29351
	4	2	8 SEC Audit	DA_DA_Cust1_88489243-655F-43A	7-8FA0-7216B092B7	33351 On	SEC Audit and Possible Litiga	ation Idle	33351



Highlight TotalltemsHeld and select Data Type/Whole Number.

File		Home Transform Add	l Column View					
Close & Load	St I	Refresh review	Choose Remove Columns Columns • Manage Columns	Keep Remove Rows * Rows * Reduce Rows	A↓ A↓ Sort	Split Column + By	Data Type: Any Decimal Number Currency Whole Number	
>	·	CaseName	TotalltemsHeld				Date/Time Date	
Queries	2	Fraud Investigation	29558				Time	
)	3	HR Issue	29351				Duration	

Figure 40 – Change Data Type



Select Close & Load/Close & Load To In the Load To screen, Select Only Create Connection. Check Add this data to the Data Model Click Load. Select Insert/Pivot Chart/Pivot Chart Select Use an External Data Source Click Choose a Connection. Click Query - Legal Holds Click Open Click OK

Move the chart to where you would like it to appear on the spreadsheet.

Highlight the new Pivot Chart and select **PIVOTCHART TOOLS\ANALYZE\Field List** if a list of Pivot Chart fields does not appear to the right.



Figure 41 – Field List

Check CaseName and TotalltemsHeld within the PivotChart Fields.



Figure 42 – PivotChartFields

Right-click on Chart and select Change Chart Type.



28 29	Sum of TotalitemsHeld	
30	Total	
31	24000	Fill Outline Vertical (Value)
32	34000	Thi Outline
33	33000 0	
34	32000 🔿	
35	31000 O	<u>D</u> elete
36	30000 O	ST Reset to Match Style
37	29000 O	in nesee to materiotyte
38	28000 0	Change Chart Type
20	27000	
35	Employee Fraud HR	E Select Data
40	Discrimination Investigation	3-D Rotation
41	Caroblama 🔻	- <u></u>
42		Format Gridlines
43		
		Format Avis

Figure 43 – Change Chart Type

Select the appropriate chart type and click **OK.**





Right-click on SumofTotalItemsHeld and select Hide all Field Buttons in Chart.

28 29 30 31 32 33 34	Sum of Tota	iltemsHe	Move Up Move Down Move to Beginning Move to End	
35 36 37 38 39 40		Υ 	Move to Report Filter Move to Axis Fields (Categories) Move to Legend Fields (Series) Move to Values	CaseName CaseName Ca
41 42 43 44		×	Hide Value Field Buttons on Chart Hide All Field Buttons on Chart Remove Field	

Figure 45 – Hide All Field Buttons

Right-click on the word Total and select Edit Text. Rename to Total Legal Holds By Case.





Figure 46 – Edit Text

Your Discovery Accelerator Dashboard should now look like the graphic below. Note that highlighting an area of the Pie Chart will indicate the total number of items on Legal Hold, per case.



Figure 47 – DA Dashboard

Adding a chart to display search results

Now create another chart to add to this report to show Search results.

Highlight the Power Query Tab. Select From Other Sources/From OData Feed

Enter <u>http://DAservername/DAReporting/OData/Searches(customerID=X)</u> Replace **X** with your customerID.

Click OK.

Under Query Settings, rename the Query to Searches



Query Settings	×
✓ PROPERTIES	
Name	
Searches	

Figure 48 – Enter URL

There is a lot of information in this dataset, but we will remove all columns except SearchName and NumberOfHits by highlighting the other columns with **Ctrl-Shift** and selecting **Remove Columns/Remove**

<u>Colu</u>	mns.												
File	Home	Transform Adv	d Column	View									
Close & Load •	Refresh Preview *	Properties	Choose	Remove Columns •	Keep Remove Rows + Rows +	Remove Duplicates	A↓ Z↓	Split Column -	Group By	Data Ty	/pe: Any • e First Row As Headers • place Values	Merge Queries Append Queries	Carlow Sour
Close		Query	Manage	Bill Rem	love Columns	Rows	Sort			Trans	form	Combine	New Qu
	٢	▼ SearchName		8 Rem	ove Other Columns	▼ NumberOfArr	chives [Percenta 	geComp	olete 💌	NumberOfHits 💌 Num	berOfUniqueHits 💌 Sear	rchSubName 💌
sa 1	2015 10:09:00 P	M Employee Discrim	ination Sear	ch	1 In Revie	.w		9		100	29538	29538 Bill (Davis
ueni	2015 10:10:00 P	M Fraud Investigatic	on Search		2 In Revie	5W/		9		100	29380	29380 Hen	ry Dillon
Ø I	/2015 3:17:00 A	M HR Issue Search			4 In Revie	5W		9		100	29351	29351 Johr	h Harpar
1	/2015 3:18:00 A	M SEC Audit Search			5 In Revie	SW.		9		100	33351	33351 Gail	Goodman

Figure 49 – Remove Columns

Select NumberOfHits and select Data Type/Whole Number.

File		Home Transform Add	Column View				
Close a	8 I	Refresh	Choose Remove Columns Columns •	Keep Remove Rows • Rows •	₽↓ X↓	Split Column - By	Data Type: Any - Decimal Number Currency
Close		Query	Manage Columns	Reduce Rows	Sort		Whole Number
>	m .	SearchName	▼ NumberOfHits [•			Date/Time
S	1	Employee Discrimination Search	n 295	38			Date
nen	2	Fraud Investigation Search	293	80			Time
ð	3	HR Issue Search	293	51			Date/Time/Timezone
	4	SEC Audit Search	333	51			Duration

Figure 50 – Select Data Type

Select Close & Load/Close & Load To In the Load To screen, select Only Create Connection. Check Add this data to the Data Model Click Load. Select Insert/Pivot Chart/Pivot Chart



Select Use an External Data Source

Click Choose a Connection.

Click Query - Searches

Click Open

Click OK

Move the chart to where you would like it to appear on the spreadsheet.

Highlight the new Pivot Chart and select **PIVOTCHART TOOLS\ANALYZE\Field List** if a list of Pivot Chart fields does not appear to the right.



Figure 51 – Field List

Check both SearchName and NumberOfHits within the PivotChart Fields.



Figure 52 – PivotChart Fields

Right-click on the chart and select Change Chart Type.

Select the Chart Type of your choice and Click OK.



All Charts	
Recent Recent Templates Golumn Column Line	Clustered Bar
● Pie ■ Bar ● Area ● X Y (Scatter) ■ Stock	
 <i>፼</i> Surface ☆ Radar <u> </u> <u> </u> Combo 	

Figure 53 – Select Chart

Right click on SumofNumberofHits and select Hide all Field Buttons on Chart.

Your Discovery Accelerator Dashboard should now look like the illustration below.



Figure 54 – DA Dashboard

Add a header to the dashboard.

Select **Insert/Shapes** and choose **Rectangle**. Click and drag to fill the top four rows. Leave the rows of the last two columns blank, as we will insert another object there.



INSERT	PAGE LAYOUT	FORMULAS	DATA	REVIEW V
ed Table	Pictures Online Pictures	Shapes SmartArt	Contraction of the second seco	Store
Xv	f _x	Recently Used	Shapes ⊃□△ጊ }☆	,,¢&G

Figure 55 – Insert Shapes

Right click on the rectangle area and select Edit Text

*	Cu <u>t</u>
Ē	<u>С</u> ору
rtmentName 💼	Paste Options:
kers	Ê
porate Resea 🛅	Edit Te <u>x</u> t
	Edit Points

Figure 56 – Edit Text

Type Discovery Accelerator Dashboard. Center the text and adjust the font.

Your dashboard should look like the illustration below.





Enterprise Vault 12 Whitepaper – Best Practices for Enhanced Accelerator Reporting

Figure 57 – DA Dashboard

As a final step, create a tab on the top, right-hand corner of the dashboard, which will allow us to link to the Compliance Accelerator Dashboard we will create next.

Select **Insert/Shapes** and **Choose Rectangle** to fill the final two columns of the top four rows of our dashboard.

Right-click on the new rectangle and select Edit Text.

Type **Compliance Accelerator Dashboard**. Center the text and adjust the font.

Right click and select Hyperlink.

Select Place in this Document/CA Dashboard.

Click OK



Figure 58 – Place in this Document


Your dashboard should now look like the illustration below.





Creating a Compliance Accelerator Dashboard

Now click on the **Compliance Accelerator Dashboard tab** you just created, to move to the CA Dashboard worksheet. We will create and work with the Compliance Accelerator datasets listed below:

- Departments
- ReviewerActivityByReviewer
- ReviewActivitySummary

In this example, you will load all of the dataset queries into the Data Model, prior to creating the dashboard charts. You will also merge datasets together.

Performing a Departments Dataset Query

Select PowerQuery/From Other Sources/From OData Feed

Enter: http://CAservername/CAReporting/OData/Departments(customerID=X)



Replace **x** with your customerID number. Click **OK**. If you receive a **User was not authorized** error, click **Windows.** Select **Use my current credentials**. Click **Connect**. Change the **Query Name** from **Query 1** to **Departments**. Select **Close & Load\Close & Load To....** Select **Close & Load\Close & Load To....** Select **Only Create Connection** Click **Add this data to the Data Model**. Click **Load**. Under **Workbook Queries**, you will see the **Departments** query added. Now we will add a second dataset.

Performing a ReviewerActivityByReviewer Dataset Query

Select PowerQuery/From Other Sources/From OData Feed and enter:

http://CAServerName/CAReporting/OData/ReviewerActivityByReviewer(customerID=X) Replace X

with your customerID.

Click OK.

Under Query Settings, rename query to ReviewerActivityByReviewer.



Figure 60 – Enter URL

The dataset we have selected lists the DepartmentID, but there is no corresponding Department Name. To resolve this, we will merge the **Departments** and the **ReviewerActivityByReviewer** datasets together. Click on a **blank area** of the query table to save the query name.

Merging Queries together

Select Merge Queries.





Figure 61 – Merge Queries

Select the **Down Arrow** in the middle of the Merge screen and select the **Departments Query**.

elect a table a	and matching col	umns to cre	ate a merged table	2,		
CustomerID	DepartmentID	Status	Mark	ReviewerName	ReviewerLoginName	Total
1	5	Pending	Pending	Gail Goodman	EV\ggoodman	55
1	5	Questioned	Questioned	Gail Goodman	EV\ggoodman	26
1	5	Reviewed	Reviewed Irrelevant	Gail Goodman	EV\ggoodman	633
1	5	Reviewed	Reviewed Relevant	Gail Goodman	EV\ggoodman	207
1	5	Escalated	NA	Gail Goodman	EV\ggoodman	3
ReviewerActivi CaseHistorv	tyByReviewer (Cur	rent)				

Figure 62 – Select Query to Merge

Holding down the **Ctrl** key, highlight the columns you would like to merge the tables together with and click **OK**.



CustomerID	1	DepartmentID	2	Status Mark		ReviewerName R	eviewerLoginName	Total
	1		5	Pending Pending		Gail Goodman E	∧ggoodman	55
	1		5	Questioned Question	ned	Gail Goodman E	∧ggoodman	26
	1		5	Reviewed Reviewe	d Irrelevant	Gail Goodman E	∧ggoodman	633
	1		5	Reviewed Reviewe	d Relevant	Gail Goodman E	∧ggoodman	207
	1		5	Escalated NA		Gail Goodman E	Aggoodman	3
	1		5	Trading Desk	Open	12/10/2015 7:45:05 PM	/ 12/12/2015 6:01:1	2 AM
	1		6	Corporate Research	Open	12/10/2015 9:04:59 PM	/ 12/12/2015 6:01:1	1 AM
	1		7	Mergers+Acquisitions	Open	12/10/2015 9:29:13 PM	/ 12/12/2015 6:01:1	1 AM
			8	Brokers	Open	12/10/2015 9:29:53 PM	/ 12/12/2015 6:01:1	2 AM
	1							

Figure 63 – Select columns to merge tables

Select the Data Privacy Level you desire and click Save.



Figure 64 – Privacy Levels

Click OK.

The Merged Table appears. Click the **opposing arrows** in the top, right hand corner beside **New Column**. The Departments dataset appears with the associated columns. Deselect **All Columns** and select **DepartmentName**.

Click OK.



Searc	h Columns to	o Expand		
• Exp	and O Ago	gregate		
	Select All Col	umns)		
	ustomerID			
	epartmentIC)		
	epartmentN	ame		
	tatus			
	reatedDate			
	IodifiedDate			
110	original col	umn name	as prefix	
1 030	original con	anni name	as prent	

Figure 65 – Select Column

Right-click on NewColumn.DepartmentName.

Select **Rename** to rename the column to **DepartmentName**.

Ctrl-Click to highlight the **CustomerID**, **DepartmentID**, **Status** and **ReviewerLoginName** columns and select **Remove Columns/Remove Columns**.

File	ł	Home	Transform Add	d Colum	in View								
Close & Load •	R Pr	Refresh review •	Properties	Choo	Remov	Keep Remove Rows * Rows *	Remove Remove	Duplicates Errors •	AN NA	Split Group Column - By	Data Type: Any Use First R 2 Replace Va	▼ ow As Headers ▼ lues	Mer App
Close			Query	Mar	nage 👯 R	emove Columns	Rows		So	rt	Transform		G
>		Custom	erID 💌 Department	tID 💌	Sta:	emove Other Columns	🔻 Re	viewerName	-	ReviewerLoginName	Total 💌	DepartmentName	Ŧ
es	1		1	5	Pending	Pending	Ga	ail Goodman		EV\ggoodman	55	Trading Desk	
nen	2		1	5	Questioned	Questioned	Ga	ail Goodman		EV\ggoodman	26	Trading Desk	
Ø	3		1	5	Reviewed	Reviewed Irrelevant	Ga	ail Goodman		EV\ggoodman	633	Trading Desk	
	4		1	5	Reviewed	Reviewed Relevant	Ga	ail Goodman		EV\ggoodman	207	Trading Desk	
	5		1	5	Escalated	NA	Ga	il Goodman		EV\ggoodman	3	Trading Desk	
	6		1	5	Pending	Pending	He	enry Dillon		EV\hdillon	44	Trading Desk	-

Figure 66 – Remove Columns

Highlight the Total column and change Data Type to Whole Number.



File		Home	Transf	orm Ado	I Column	View							
Close Close	Ba I	Refresh review •	Prop Adva	erties nced Editor	Choose F Columns Co Manage C	Remove olumns -	Keep Rows •	Remove Rows • Rec	luce	Remove Duplicates Remove Errors 🔹 Rows	Ž↓ Z↓ Sort	Split Column • By	Data Type: Any • Decimal Number Currency Whole Number
>	m .	Status	Ŧ	Mark	Ŧ	Reviewer	Name 💌	Total	-	DepartmentName	¥		Date/Time
5	1	Pending		Pending		Gail Good	iman		55	Trading Desk			Date
uerie	2	Question	ned	Questioned		Gail Good	Iman		26	Trading Desk			Time
ð	3	Reviewe	d	Reviewed Im	elevant	Gail Good	iman		633	Trading Desk			Date/Time/Timezone
	4	Reviewe	d	Reviewed Re	elevant	Gail Good	lman		207	Trading Desk			Duration
	5	Escalated	d	NA		Gail Good	iman		3	Trading Desk			Text
	6	Pending		Pending		Henry Dil	lon		44	Trading Desk			True/False
	7	Question	ned	Questioned		Henry Dil	lon		140	Trading Desk			Binary
	0	Daviewa	4	Davisuad In	alaunat.	Hanny Dill	lan		617	Trading Dark			

Figure 67 – Change Data Type

Select Close & Load\Close & Load To....

Select Only Create Connection

Check Add this data to the Data Model.

Click Load.

Under Workbook Queries, you will see the ReviewerActivityByReviewer query added.

We will now add our final dataset.

Performing a ReviewActivitySummary Dataset Query

Select PowerQuery/From Other Sources/From OData Feed.

Enter: http://CAservername/CAReporting/OData/ReviewActivitvSummarv(customerID=x)

Replace **x** with your customerID number.

Click OK

Under Query Settings, Rename the query to ReviewActivitySummary.



Figure 68 – Add Query Name

Click on a **blank area** of the query table to save the query name.

Select Merge Queries

Select the **Down Arrow** in the middle of the Merge screen and select the **Departments** query.



Holding down the **Ctrl** key, highlight the columns you would like to merge the tables together with and click **OK**.

CustomerID	1	DepartmentId	2	MTID	MessageTyp	pe	Unreviewed	Reviewed	Pending	Question	led
	1		8	2	Exchange - in	nternal	900	554	47 63	1	74
	1		6	2	Exchange - in	nternal	2986	383	32 52	5	43
	1		7	2	Exchange - in	nternal	2655	414	40 38	4	58
	1		5	2	Exchange - in	nternal	5940	260	23	5	20
CustomerID	1	DepartmentID	z	DepartmentName		Status	CreatedDate		ModifiedDate	2	
CustomerID	1	DepartmentID	2	Departme	entName	Status	CreatedDate		ModifiedDate	2	
	-		6	Cornorat	esk Decearch	Open	12/10/2015	0-04-50 DM	12/12/2015 0	-01-11 AM	
	-		7	Mergerca	Acquisitions	Onen	12/10/2015	0-20-13 DM	12/12/2015 0	-01-11 AM	
	1		8	Brokers	Acquisicions	Open	12/10/2015	0-20-52 DM	12/12/2015 6	-01-12 AM	

Figure 69 – Select columns to merge tables

Select the Data Privacy Level you wish and click **Save**.

le data tr ed scope	ansfer. Incorre e. More inform	ect nation
*	Private	Ŧ
	Save	Cancel
	le data tr ied scope	le data transfer. Incorre ed scope. More inform Private

Figure 70 – Privacy Levels

Click OK.

The Merged Table appears. In this example, we will select the **opposing arrows** in the top, right hand corner, beside **New Column**.

The Departments data entity appears with the associated columns. Deselect **All Columns** and select only the **DepartmentName** column from the Departments entity.



Expand Aggregate Select All Columns
(Salact All Columns)
(Select All Columns)
CustomerID
DepartmentID
DepartmentName
Status
CreatedDate
ModifiedDate

Figure 71 – Select Column

Click OK.

Right-click on **NewColumn.DepartmentName** and rename the column to **DepartmentName**.

Highlight the columns you wish to remove and select Remove Columns/Remove Columns.

Ŧ	ŀ.							F	leviewA	ctiv	vitySumman	y - Query Edit	or	
Ŧ	lome Transform Add	Column	View											
R Pr	efresh	Choose Columns	Remove Columns •	ep Remove Novs • Rows •	👫 Rei	move Duplicate move Errors 🔻	s A↓ Z↓	Spl Colur	lit Grou		Data Type: Any Use First Ro 1 ₂ Replace Val	▼ w As Headers ▼ ues	Merge Queries Append Queries Combine Binaries	New Sour
	Query	Manage	Columns	Red	uce Ro	IWS	Sort				Transform		Combine	New Que
.	CustomerID 💌 Department	Id 🔻 MT	Remove Column	s Type	- Ur	nreviewed 💌	Reviewe	d 🔻	Pending	-	Questioned	 ReviewedRele 	vant 💌 DepartmentNa	me 🔻
1	1	8	2 Exchange	e - internal		900		5547		631	5	/46	1734 Brokers	
2	1	5	2 Exchange	e - internal		5940		2600		235	2	103	844 Trading Desk	
3	1	6	2 Exchange	e - internal		2986		3832		525	4	135	1194 Corporate Rese	arch
4	1	7	2 Exchange	e - internal		2655		4140		384		888	1452 Mergers+Acqui	sitions

Figure 72 – Remove Columns

Holding down the **Ctrl** key, highlight the columns with numeric values and change **Data Type** to **Whole Number**.



File	ł	Home	Trans	form Add	d Column	View						
ose 8 oad •	ι R Pr	Refresh review •	Quen	perties anced Editor	Choose Columns (Manage	Remove Columns -	Keep Remon Rows • Rows	Remove Dupl	licates AJ rs → ZJ AJ Sort	Split Column + By	Data Typ De Cu	e: Any • ecimal Number urrency hole Number
	Ⅲ •	Unrevi	ewed	Reviewed	Pending	Questi	oned 💌 Rev	ReviewedRelevant De 1734 Br	DepartmentN	ame 💌	Da	ate/Time
	2		594	10 3.	547 600	235	203	844	Trading Desk		Tir	ne
1	3		298	16 31	832	525	435	1194	Corporate Res	earch	Da	ate/Time/Timezone
	4		265	5 4	140	384	588	1452	Mergers+Acqu	uisitions	Du	uration
											Te	xt
											Tru	ue/False
											Bi	nary

Figure 73 – Change Data Type

Select Close & Load/Close & Load To...

Select Only Create Connection.

Check Add this data to the Data Model.

Click Load.

Under Workbook Queries, the Departments, ReviewerActivityByReviewer, and

ReviewActivitySummary dataset queries are loaded into our data model.



Figure 74 – Dataset Queries Loaded

Now we are ready to build our Compliance Accelerator Dashboard.



Select Insert/Pivot Chart/Pivot Chart.

INSERT	PAGE	LAYOUT	FORMULA	S DATA	REVIEW	VIEW	POWER QL	JERY	POWERP	IVOT						
					崔 Store		?	• 1 ∎ - 1 √X - 4	• 🕸 •		••••	\sim	11	" "		
nded Tab les	le Pictur	s Online Pictures	Shapes Smar	tArt Screenshot *	🀬 Му Арр	s *	Recommended Charts	-	<u></u> -	PivotChart *	Power View	Line C	olumn	Win/ Loss	Slicer	Timeline
			Illustrations		Add-ins			Chart	s	Pivot <u>(</u>	hart		dines		Fi	ilters
\times	√ fx									} <u>≣</u> ivot0	Chart & Piv	Pivot	Chart			
В			с	D		E	F			G		Use Pi summ comp	ivotChar narize da licated d	ts to gra ta and e lata.	phically xplore	

Figure 75 – Insert PivotChart

Select Use an external data source.

Select Choose Connection.

Select Query – ReviewerActivityByReviewer.

Click Open.

Click OK.

Click on an area of the chart.

Select **PIVOTCHART TOOLS\ANALYZE\Field List** if a list of Pivot Chart fields does not appear to the right.



Figure 76 – Select Field List

Check all PivotChart Fields except Mark.



Figure 77 – PivotChart Fields

Adjust the chart size to fit the spreadsheet, leaving the four top rows and the first few columns blank.





Figure 78 – Adjust Chart Size

Right-click on Sum of Total and select Hide All Field Buttons on Chart.

Select Insert/Slicer



Figure 79 – Slicer

Check Department Name and Reviewer Name for the Slicers.



Insert Slicers ? X	
ACTIVE ALL	
ReviewerActivityByReviewer DepartmentName Mark ReviewerName Status Total	
OK Cancel	

Figure 80 – Select Column Names

Click OK.

Reposition the slicers to as illustrated below.

By inserting slicers, we can narrow our view of the content reviewed down to a specific Compliance

Accelerator Department and Reviewer.

Right-click on Total and select Edit Text. Rename the Chart Title to Reviewer Activity.

Adjust the font size to your preference.



Figure 81 – Report with Slicers



Now we will add a second chart to the dashboard.

Select Insert/Pivot Chart/Pivot Chart.

Select Use an external data source.

Select Choose Connection.

Select Query – ReviewActivitySummary

Click Open.

Click OK.

Click on the new chart.

Click on the **PIVOTCHART TOOLS\ANALYZE\Field List** if the PivotChart Fields do not automatically appear.

Check all the PivotChart Fields.



Figure 82 – PivotChart Fields

Adjust the new chart to fit the spreadsheet.

Right-click on the grey, DepartmentName box and select Hide All Field Buttons on Chart.

You dashboard should now look like the illustration below.





Figure 83 – CA Dashboard

Select **Insert\Shapes** and select the **Rectangle** to create a header for the dashboard. Click and drag the over the top four rows, leaving two/three columns on the right blank. We will add another object later. Right click on the rectangle area that you created for the dashboard header and select **Edit Text**. Provide a name for your dashboard. Adjust the font size and center the text.



Figure 84 – CA Dashboard



Select Insert/Shapes and select another Rectangle.

Position it over the two or three columns on the far right that remain blank.

This time we will create a tab that links to the DA Dashboard from the CA Dashboard.

Right-click and select Edit Text

Right-click and select Hyperlink.

Select Place in this document/DA Dashboard

Total Ins Link to: Link to: Link to: Egisting File or Web Page Place in This Document Questioned	ert Hyperlink	? ×
Link to: Text to display: < <selection docu<="" in="" td=""> Image: Selection in Docu Image: Selection in Docu Image: Selection in Docu Type the cell reference: Egisting File Or select a plage in this document: Image: Selection in Docu Image: Selection in Docu Place in This Document Questioned Image: Selection in Docu</selection>	ient>>	ScreenTig
Questioned Create New Document EV\hdillon Corporate Research E-mail Address		

Figure 85 – Create Hyperlink

Click OK.



Completed CA and DA Dashboards







Figure 87 – DA Dashboard



Understanding the 12.1 CA and DA Datasets

12.1 CA Comparative Reporting Datasets

New CA datasets allow administrators to create comparative reports which detail the end-to-end results from Enterprise Vault into CA of Randomly Sampled archived data. Customers need reporting to ensure that the number of items sampled by Enterprise Vault and targeted for ingestion into CA, correlates with the number of items that CA actually ingests for review.

The Enterprise Vault Classification Engine can discard or exclude messages from CA review based upon classification policies. For example, perhaps the Classification Engine excludes or discards certain emails considered Spam from a particular external recipient from CA review. This is beneficial for the reviewers, as they do not have to wade through emails that are irrelevant to the review process. This can also affect the number of items we ingest into CA for review. An administrator must show an auditor not only the number of items ingested into CA but also the number of items discarded or excluded from review, based upon Classification policies applied or duplicate items. The table below lists the three new CA Datasets. <u>Appendix B</u> provides a detailed description of each field within the new datasets.

Dataset	Dataset Description	
SamplingSummary		Provides compliance sampling statistics data from Enterprise Vault.
GuaranteedSamplingSum	imary	Provides compliance guaranteed sampling statistics data from Enterprise Vault CA.
StatisticalSamplingSummary		Provides compliance statistical sampling statistics data from Enterprise Vault CA.

Table 7 – EV12.1 CA Datasets for Comparative Review

CA Comparative Reporting compares the **SamplingSummary** dataset (which shows compliance sampling statistics from an EV perspective) against the **GuaranteedSamplingSummary** or the **StatisticalSamplingSummary** (which shows compliance sampling from a CA perspective). Customers use the **GuaranteedSamplingSummary** or **StatisticalSamplingSummary** dataset, depending on which CA sampling mode they configure. Guaranteed Sampling is the default, sampling mode. To change the sampling mode, go to **Configuration/Settings**, expand **Random Capture** and select **Sampling Mode**. A value of 1 = Guaranteed Sampling and a value of 0 = Statistical Sampling.



Ø	Veritas Enterprise	Vault Compliance Accelerator 12
Home Review Research Departments Employees Reports Monitor	Application Configuration	
Search Schedules Reviewing Statuses Import Configuration Account Inform	ation Directory Mappings Department Partitions	Department Attributes Settings
🎭 Select All 🛛 🧠 Clear All 🖓 Revert To Default		
Configuration Settings		
Name	Restart Required	Value Last Mod
Ad Hoc Searches (8 items)		
Diagnostics (6 items)		
Document Conversion (15 items)		
Export/production (26 items)		
🝙 General (9 items)		
Home Page (9 items)		
Item Prefetch Cache (6 items)		
Item Prefetch Cache (Advanced) (19 items)		
Policy Integration (1 item)		
Profile Synchronization (13 items)		
Random Capture (9 items)		
Enable background processing of captured items	v	~
First Pass Sampling time (server local time)	~	13 h 🗘 : 50 min 🌲 🛛 Admin
Maximum age of unresolved items (hours)	~	96
Maximum resolve attempts	\checkmark	5
Record extra statistics for evidence of review reports	✓	<i>、</i>
Sampling mode	v	1

Figure 88 – Configuring Sampling Mode

Guaranteed Sampling captures all items for each monitored employee throughout the day. It picks a random sample for each employee's items and adds them to the review set.

Statistical Sampling takes a random sample of items captured during the previous 24-hour period and adds them to the review set. Customers can also enable capping with Statistical Sampling. Capping can set a limit on the number of randomly sampled items that CA captures and adds to a department review set.

Sampling Summary

Listed below is output from the **SamplingSummary** dataset in the form of a PivotChart.





Enterprise Vault 12 Whitepaper – Best Practices for Enhanced Accelerator Reporting

Figure 89 – Sampling Summary Pivot Chart

The **SamplingPotential** is 57 items but the sum of items to **IngestToCA** is only 38. There is a difference of 19 items between **SamplingPotential** and number of items to **IngestToCA**. The reason for the difference is that Enterprise Vault and the Classification Engine discarded or excluded 19 items from review.

The Classification Engine identified eight messages for **ClassificationDiscard**. In this example, the Classification Engine tagged certain email addresses from social media sites with the **evaction.discard** property.

	🚰 Social Media	Enterprise Vault	Veritas Information Classifier	evaction.discard	
--	----------------	------------------	--------------------------------	------------------	--

Figure 90 – Classification Discard Policy

Six items Enterprise Vault tagged with the **evtag.exclusion** property and did not send to CA for Sampling.

The **ClassificationExclude** bar graph lists these six items excluded from review. In this example, emails tagged within Outlook as **Low importance** receive an **evtag.exclusion.**

🗿 Low importance	Enterprise Vault	Veritas Information Classifier	evtag.exclusion
	Figure 91 - Classification Evolute	Policy	

Figure 91 – Classification Exclude Policy



MessageDiscard lists five discarded items. **MessageDiscard** increments when we encounter Exchange items Enterprise Vault does not include for sampling. These include **delivery reports**, **read receipts**, **out-of-office replies**, **quota warnings**, and **system messages**.

Two remaining fields within the chart, **StatisticalDiscard** and **DuplicationDiscard**, contain zero items. **StatisticalDiscard** is the total number of items that Enterprise Vault did not include for statistical sampling. This number is 0 if you chose guaranteed sampling. **DuplicationDiscard** is the number of items that were not sampled because they were duplicates of other items.

The 57 items listed in **SamplingPotential**, minus the 19 items discarded and excluded from review, results in 38 items remaining to **IngestToCA**. Note: If a customer deploys Compliance Accelerator 12.1 with EV 12.0, then the **SamplingSummary** dataset will not provide data for **DuplicationDiscard**, **StatisticalDiscard**, **ClassificationDiscard** and **MessageDiscard**. To see these property values,CA 12.1 must be installed with EV12.1.

Upon analyzing **SamplingSummary** (the view within EV), it is important to compare against **StatisticalSamplingSummary** or **GuranteedSamplingSummary** (the views within CA). The 38 items to **IngestToCA** is consistent across both datasets. The **GuaranteedSamplingSummary** pivot chart displayed in **Figure 92** breaks down the sum of 38 items to include 26 items **RandomSampled** and 12 items **PolicySampled**.



Figure 92 – Guaranteed Sampling Summary



In this case, a number of emails containing financial phrases such as **adjusted gross margin** and **earnings per share** were **PolicySampled** and automatically, explicitly included for review, due to the **evtag.inclusion** custom property.

🚰 Financial Data	Enterprise Vault	Veritas Information Classifier	evtag.inclusion



Two remaining fields within the chart, RelevantSampled and GSSSampled, contain zero items.

RelevantSampled applies if customers enable Intelligent Review in a department. When reviewers mark items as relevant or irrelevant, Compliance Accelerator can learn from the past reviewer actions. When a new batch of Unreviewed items is ready for review, the system can categorize these items as **Unreviewed\Relevant** or **Unreviewed\Irrelevant** based upon the marks of previous reviewers. This speeds up the review process for reviewers, who can spend more time focusing on the **Unreviewed\Relevant** items.



Figure 94 – Intelligent Review

RelevantSampled would be the number of items placed under the **Unreviewed/Relevant** filter of the CA Review pane. **GSSSampled** are the number of items sampled and captured based upon a guaranteed sample search.

Statistical Sampling Summary

Listed below is an example of comparative reporting between the **SamplingSummary** and **StatisticalSamplingSummary** reports.

The **SamplingSummary** pivot chart (**Figure 95**) shows that there is a **SamplingPotential** of 74 items. The number of items to **IngestToCA** is 54. The reason for the difference is that the Classification Engine discarded 12 items, as indicated by **ClassificationDiscard**, discarded six messages as indicated by **MessageDiscard** and excluded two items from review as indicated by **ClassificationExclude**. There were zero messages, for **StatisticalDiscard** and **DuplicationDiscard**.





Figure 95 – Sampling Summary

Comparing the **SamplingSummary** report with the **StatisticalSamplingSummary** report (**Figure 96**), the number of items to **IngestToCA** is 54 items, the same in both reports. The number of **RandomSampled** items is 46 and the number of items included in the review set based on the **PolicySampled** is eight. These items the Classification engine marked with an **evtag.inclusion** property to ensure to include within the review set.

The number of **RelevantSampled** items is four. RelevantSampled applies if customers enable Intelligent Review in a department. When reviewers mark items as relevant or irrelevant, Compliance Accelerator can learn from their past actions. When a new batch of Unreviewed items is ready for review, the system can categorize these items as **Unreviewed\Relevant** or **Unreviewed\Irrelevant** based upon previous review actions. **RelevantSampled** would be the number of items placed under the **Unreviewed/Relevant** filter of the CA Review pane.

In this example, **CappingDiscard** is zero. By applying a cap, you can restrict the number of items included in the review set. In this instance, capping was not set.







Important: If guaranteed sampling or statistical sampling does not execute for some days, but Enterprise Vault continues adding data to CA, you may see some unexpected results. For example, with guaranteed sampling, the number of relevant captured items may exceed the sampling potential or the number of items to ingest to CA. To get a proper summary when sampling does not execute daily, fetch the report from last run sampling date to latest run sampling date

Comparative Reporting Workflow

The comparative reporting workflow moves through several stages.



Figure 97 – Comparative Reporting Workflow

Journaling

The Exchange, Domino or SMTP Journaling Task will first archive the item and place it into the Storage queue.

Storage Service

The storage service will:



- Spawn **EVCompliance.exe** if the customer is running CA. **EVCompliance.exe** stamps the item with a CA indexable property and then waits until items are completely indexed and classified before proceeding.
- Store items in the **ItemSamplingStatusLog** table from EV vault store database.
- Add items to the ItemSamplingStatusLog table with a DiscardType value of 3, if items are unsupported for sampling. Enterprise Vault does not include for sampling Exchange items such as delivery reports, read receipts, out-of-office replies, quota warnings, and system messages. These are identified in the reports as MessageTypeDiscard items.

Indexing Service

The Indexing service will:

- Index items and apply classification policies, if applicable.
- Set the IndexCommited column value to 1 in the JournalArchive table.
- If items have a Classification Discard policy, then items are marked with a DiscardType value of 2 in the ItemSamplingStatusLog table.
- If items are duplicates then items are marked with a **DiscardType** of **1** in the **ItemSamplingStatusLog** table.

Storage Service (EVCompliance.exe)

Once an item is indexed with IndexCommited = 1 or DiscardType <> 0, EVCompliance.exe will process items from the ItemSamplingStatusLog table in the following way, based upon the **DiscardType** and **CAPolicyAction** column values, and increment the following dataset counters.

DiscardType	CAPolicyAction	Counter Incremented
1		DuplicateDiscard
2		ClassificationDiscard
3		MessageTypeDiscard
	522	ClassificationExclude

Table 8 – ItemSamplingStatusLog

Note: Statistically discarding an item (only available in Statistical Sampling mode) increments the **StatisticalDiscard** counter.



12.1 DA Datasets

Enterprise Vault 12.1 introduces two new DA Datasets. The table below describes the new datasets. <u>Appendix</u> <u>B</u> provides a detailed listing of each new Dataset field.

Dataset	Description
SearchCriteria	Gives details of search criteria used in a particular search.
ItemDetails	Provides information on all the items in one or all of the cases that are associated with the specified customer database.

Table 9 – DA Datasets

Search Criteria

The SearchCriteria Dataset provides information such as the Date Range and search terms used within a search.

Item Details

The **ItemDetails** Dataset provides detailed information on each individual item, including the name of the archive where the item resides, the **MailDate** (the date the item was sent or received), **Author**, **Recipients**,

Subject, the **LatestMark** and the **LatestComment** a reviewer assigned to the item. Also included in the ItemDetails Dataset (just not displayed in the table below) is the **Customer** and **Case ID**, the item's **DAID** (a unique number associated with the item within DA), the **SaveSetID** and **ArchiveID** associated with the item.

ArchiveName	MailDate	Author	Recipients	Subject	🛛 LatestMark 💌	LatestComment 斗
Journal	10/26/2001 14:4	5 Dana Davis	Jim Meyn;Mark Davis	RE: Full Requirements - Due Dilligence Items	Relevant	possible violation
Journal	7/17/2005 11:0	3 Dennis Jobs	Bob@OtherCompany.Com.external;Joe User	ACME Corp Results	No Mark	
Journal	7/17/2005 11:0	8 AdminSupport@EnterpriseVault.com	Joe User	Re: Searching inside attachments	No Mark	
Journal	1/3/2002 14:1	2 Michael Scott	Vault Administrator	Public Folder slide show	No Mark	
Journal	7/17/2005 11:0	8 AdminSupport@EnterpriseVault.com	Joe User	Re: Searching inside attachments	No Mark	
Journal	7/17/2005 11:0	8 Bob@OtherCompany.Com.external	Dennis Jobs;Joe User	Re: ACME Corp Results	No Mark	

Figure 98 – ItemDetails Dataset



Microsoft SQL Server Reporting Services

You can also create custom reports using OData, accessing the DA and CA datasets from Microsoft SQL

Server Reporting Services.

Go to the SQL Server Reporting Services home page and select Report Builder.



Figure 99 – Select Report Builder

If you receive the Getting Started Wizard, check **Don't show this dialog box at startup**, and click the red **X** at the top, right corner of the screen to exit out of the wizard.

Right-click on **Data Sources** and select **Add Data Source**.

🚞 Images		-		
🚞 Data Sources	Add	Data	Source	
🚞 Datasets			Joarcem	

Figure 100 - Add Data Source

Type a description of the report under the Name field (e.g. LegalHoldsDataSource).

Select Use a connection embedded in my request

Under Select connection type, choose XML

In the Connection string box, enter the following:

http://DAservername/DAReporting/oData/LegalHolds(customerID=x)?\$format=application/atom+x

ml

Replace **DAservername** with the name of your DA server. Replace the **x** after customerID=, with your customerID.

Note: Since Microsoft SSRS requires data in XML format, it is **mandatory** that every connection string you enter includes **?\$format=application/atom+xml**.



	Data Source Properties		x
General Credentials	Change name, type, and connection options.		
	Name: LegalHoldsDataSource O Use a shared connection or report model		
	Use a connection embedded in my report Select connection type: YMI		
	Connection string: http://DA/DAReporting/oData/LegalHolds(customerID=2)?	Build	
	\$format=application/atom+xml	<i>f</i> *	
	Use single transaction when processing the queries	Test Connection	
Help		OK Cance	el

Figure 101 – Data Source Properties

Select Credentials

Select **Use this user name and password** and enter the account name and password with the appropriate permissions.

Check Use as Windows Credentials

	Data Source Properties
General Credentials	Change the credentials used to connect to the data source.
	A This information is only stored when you save the report to a report server.
	 Use current Windows user. Kerberos delegation might be required. Use this user name and password User name: e/vaultadmin Password: ••• Use as Windows credentials Impersonate the authenticated user after connecting Prompt for credentials Enter prompt text: Use as Windows credentials O use as Windows credentials O use as Windows credentials
Help	OK Cancel

Figure 102 – Data Source Properties



Click OK.

Right-click Datasets/Add Dataset



Figure 103 – Add Dataset

Add a description under the Name field for the newly created dataset (e.g. LegalHoldsDataSet).

Select Use a dataset embedded in my report.

Select the Data source created earlier (e.g. LegalHoldsDataSource).

Under query, enter the following:

<Query>

<ElementPath IgnoreNamespaces="true">

feed{}/entry{}/content{}/properties

</ElementPath>

</Query>

Click OK.

The properties under the newly created DataSet should now appear.

🖃 🗁 Datasets
🖃 🧰 LegalHoldsDataSet
CustomerID
📧 CaselD
📼 CaseName
E LegalHoldGroupID
Totalltems
E LegalHoldState
📼 Reason
📼 LegalHoldStatus
TotalltemsHeld
TotalHoldErrors
TotalltemsDeleted
TotalArchivesWithItemsHeld

Figure 104 – Dataset Properties



Select Insert/Chart/Chart Wizard.



Figure 105 – Dataset Wizard

Highlight the newly created Dataset and click Next.

New Chart	x
Choose a dataset	
Choose a dataset	
Choose an existing dataset in this report or a shared dataset	
LegalHoldsDataSet (in this Report) Customer(D, CaseID, CaseName, LegalHoldGroupID, TotalItems, LegalHoldState, Reason, LegalHoldStatus, TotalItemsH	
Browse	L
Create a dataset	
Help Cancel	

Figure 106 – Select the Dataset



Choose the appropriate chart type and select Next.

	New Chart	x
Choose a	chart type	
Choose a ch Chart typ	an type that best displays your data. e:	
	Column A column chart displays a series as a set of vertical bars grouped by category. Column charts are useful for illustrating comparisons amon.	
Xx	Line A line chart displays a series as a set of points connected by a single line. Line charts are used to represent large amounts of data that occ.	**
	Pie A pie chart displays value data as percentages of a total. Consider using a pie chart after the data has been aggregated to seven data poi	
-	Bar A bar chart displays data horizontally. It is popular for categorical information, because the categories can be displayed horizontally.	
	Area The area chart displays data contiguously, so it is commonly used to represent data that occurs over a continuous period of time.	
Use a	stacked chart to display the total value of multiple series.	-
Use a	100 percent stacked chart to show relative proportions between multiple series.	
lp	< <u>B</u> ack <u>N</u> ext > Cance	1

Figure 107 – Choose Chart Type

Drag the data fields under the appropriate boxes Categories, Values, and Series and click Next.

Arrange chart fields			
Add data fields to the chart. For most of aggregated data on the y-axis. A field i Available fields CustomerID	hart types, a field in the Categories list is n the Series list creates a new series in the	displayed on the x-axis. A field in the Values list shows chart.	
CaseID CaseName LegalHoldGroupID			
Totalitems LegalHoldState Reason			
Legal Hold Status Total Items Held Total Hold Errors			
Total Items Deleted Total Archives With Items Held	Categories	∑ Values	
	CaseName	Totalitems v	

Figure 108 – Define the Chart



Right-click on the down arrows beside each value and add the appropriate aggregate functions and click **Next**.

Σ Values	
Totalitems	
TotalltemsHeld	Sum
LL	Avg
	Max
	Min
	Count
	CountDistinct
	StDev
	StDevP
	Var
	VarP
< Back Next >	First
	Last
Column Groups	Previous
	Aggregate

Figure 109 – Select Values

Choose the style for the Chart and click Finish.

Adjust the size of the chart and rename the chart appropriately.



Figure 110 – Adjust Chart Size and Rename

Click Run.





The completed report displays.

Figure 111 – Final Report

Save the report to the appropriate directory structure.

	Save As Report X					
Look in:	🗁 http://sql1	/ReportServer/Discovery Accelerator Reports	~			
Recent Sites and Servers Desktop My Documents	Report Temp	olates				
	Name:	LegalHoldstrdl	Save	:		
	Items of type:	Reports (*.rdl)	Cance	el		

Figure 112 – Save Report



Appendix A: DA and CA Datasets

The tables in this appendix list each 12.0 DA and CA dataset, with the mandatory and optional parameters you can apply. Please refer to <u>Appendix B</u> for the five additional datasets introduced with the release of EV 12.1.

For a documented list of all datasets and mandatory and optional parameters to use when creating a query, go to <u>http://servername/DAReporting</u> or <u>http://servername/CAReporting</u>. Replace servername with the name of your DA or CA server. Expand Help for Reporting Website and select Discovery Accelerator datasets or Compliance Accelerator datasets (depending on whether you are on the DAReporting or CAReporting website.) Selecting a specific dataset will provide with examples, a detailed description of each dataset field, and parameters you can use.

Contents Index Search	\$ \$
 Help for Reporting Website About Discovery Accelerator Reporting Discovery Accelerator datasets Available Discovery Accelerator datasets CaseHistory CaseHistory Cases Customers ExportRunDuplicates ItemDetails LegalHoldArchives LegalHoldSearches ProductionRun ProductionRun SearchCriteria SearchDetails SearchDetails SearchPermissions 	 Discovery Accelerator datasets Available Discovery Accelerator datasets CaseHistory Cases Customers ExportRunDuplicates ItemDetails LegalHoldArchives LegalHoldSearches ProductionRunDuplicates SearchCriteria SearchDetails SearchDetails UserRolesAndPermissions
< >>	

Figure 1 – Help for Reporting Website



Discovery Accelerator Datasets

The following is a table that details the DA datasets. The table lists each fieldname within the dataset, a description, the Data Type, and if the field is Nullable or not (\Box = False, \Box = True)

Cases - The Cases dataset contains information on all cases.

Field	Description	Data Type	Nullable
CustomerID	The identifying number Discovery Accelerator has	Int32	×
	assigned to the customer to which the case belongs.		
CaseID	The identifying number that Discovery Accelerator	Int32	×
	has assigned to the case.		
CaseName	The name that the creator of the case has assigned	String	\checkmark
	to it.		
StatusID	The Status ID of the case.	Int32	×
CreatedDate	The creation date of the case.	DateTime	×
ModifiedDate	The last modified date of the case.	DateTime	×

CaseHistory - The CaseHistory dataset describes case-related parameters and details for the cases.

Field	Description				Data Type	Nullable
CustomerID	The identify	ing number	that	Discovery	Int32	×
	Accelerator ha	is assigned to th	he custo	omer.		
CaseID	The identify	ing number is assigned to t	that he case	Discovery	Int32	×
CaseName	The name that	t the creator of t	the case	e has	String	\checkmark
	assigned to it.				g	
TotalltemsInCase	The number o	f items in the ca	ase revie	ew set.	Int32	×
ItemsProduced	The number of	of items produce	ed with a	a Bates	Int32	×
	number.					
CreatedDate	The creation d	ate of the case	•		DateTime	×



LegalHoldStatus	Whether the items in the case review set are on hold to stop users from deleting them from their Enterprise Vault archives.	String	✓
ItemsUnReviewed	The number of items in the case review set that reviewers have yet to mark.	Int32	×
ItemsReviewed	The number of items in the case review set that reviewers have marked.	Int32	×
ItemsQuestioned	The number of items in the case review set that have a status of Questioned.	Int32	×
ItemsPending	The number of items in the case review set that have a status of Pending.	Int32	×
ItemsAssigned	The number of items in the case review set currently assigned to reviewers for marking.	Int32	×
ItemsUnassigned	The number of items in the case review set not currently assigned to reviewers for marking.	Int32	×

Customers - The Customers dataset provides information on all customer databases.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Discovery Accelerator	Int32	×
CustomerName	The name of the customer.	Int32	√
Directory DNS	The DNS name of the Enterprise Vault Directory service computer.	String	~
SQLServer	The SQL Server on which the customer database resides.	String	✓
Database	The name of the customer database.	String	\checkmark

ExportRunDuplicates - The ExportRunDuplicates dataset contains the same values as the "Export Run Duplicates" report. This report lists duplicate items that Discovery Accelerator has found because you chose to enable deduplication when you conducted an export run.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Discovery Accelerator	Int32	×
	has assigned to the customer.		
CaseID	The identifying number that Discovery Accelerator	Int32	×



	has assigned to the case.		
ExportName	The name of the export run.	String	\checkmark
ExportID	The identifying number that Discovery Accelerator	Int32	×
	has assigned to the export run.		
CompletionDate	The date and time at which the export run was	DateTime	\checkmark
	completed.		
DAID	The identifying number that Discovery Accelerator	Int32	\checkmark
	has assigned to the duplicate item.		
SaveSetID	The identifier of the saveset (.DVS) file that	String	\checkmark
	contains the duplicate item.		
ArchiveID	The identifier that Enterprise Vault has assigned	String	\checkmark
	to the archive in which the duplicate item is stored.		
ArchiveName	The name of the Enterprise Vault archive.	String	\checkmark
Location	The location in the user's mailbox from which the	String	\checkmark
	item was archived.		
LatestReviewer	The reviewer to whom this duplicate item was	String	\checkmark
	assigned.		
LatestComment	The last comment that a reviewer has assigned to	String	\checkmark
	the duplicate item.		
MailDate	The date on which the duplicate item was sent.	DateTime	\checkmark
Author	The author of the duplicate item.	String	✓
Recipients	The recipients of the duplicate item. This may not	String	\checkmark
	be a full list because it can contain up to 256		
	characters only.		
Subject	The subject line of the duplicate item.	String	✓
SearchName	The searches that match this duplicate item.	String	\checkmark
DuplicateofExport	The identifying number of the item that this item	Int64	×
edDAID	duplicates.		

LegalHoldArchives - The LegalHoldsArchives dataset retrieves legal hold archive information for all cases.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Discovery	Int32	×
	Accelerator has assigned to the customer.		
CaseID	The identifying number that Discovery	Int32	×


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	Accelerator has assigned to the case.		
ArchiveID	The identifier that Enterprise Vault has	String	✓
	assigned to the archive.		
ArchiveName	The name of the Enterprise Vault archive.	String	\checkmark
VaultStore	The name of the vault store in which the	String	\checkmark
	archive is located.		
NumberOfItemsOnHold	The number of items on hold in the archive.	Int32	×
EarliestDate	The earliest date on which the items on hold	DateTime	\checkmark
	were sent and received.		
LatestDate	The latest date on which the items on hold	DateTime	\checkmark
	were sent and received.		

LegalHolds - The LegalHolds dataset retrieves legal hold information for all cases.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Discovery Accelerator	Int32	×
	has assigned to the customer.		
CaseID	The identifying number that Discovery Accelerator	Int32	×
	has assigned to the case.		
CaseName	The name of the case.	String	\checkmark
LegalHoldGroupID	The ID of the legal hold on the case.	String	\checkmark
Totalltems	The number of items in the case review set.	Int32	×
LegalHoldState	Whether the items in the case review set are on	String	\checkmark
	hold to stop users from deleting them from their		
	Enterprise Vault archives.		
Reason	The reason why the items in the case have been	String	✓
	placed on hold.		
LegalHoldStatus	The status of the legal hold such as "Idle",	String	\checkmark
	"Validating", "Need Repair", "Repairing",		
	"Paused".		
TotalItemsHeld	The number of items that Discovery Accelerator	Int32	×
	has placed on hold.		
TotalHoldErrors	The number of items that Discovery Accelerator	Int32	×
	has temporarily been unable to place on hold.		
TotalltemsDeleted	The number of items that have been deleted from	Int32	×



	the Enterprise Vault archives before Discovery		
	Accelerator can place them on hold.		
TotalArchivesWithI	The number of archives in which items have been	Int32	×
temsHeld	placed on hold.		

LegalHoldSearches - The LegalHoldsSearches dataset retrieves legal hold search information for all cases.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Discovery	Int32	×
	Accelerator has assigned to the customer.		
CaseID	The identifying number that Discovery	Int32	×
	Accelerator has assigned to the case.		
SearchID	The identifying number that Discovery	Int32	×
	Accelerator has assigned to the search.		
SearchName	The name that the creator of the search has	String	\checkmark
	assigned to it.		
SearchDate	The date on which the search was run.	DateTime	\checkmark
TotalHits	The total number of items that match the	Int32	×
	search criteria.		
TotalUniqueItems	The number of items that the search has	Int32	×
	retrieved that no other search in the case has		
	retrieved.		
TotalUniqueItemsHeld	The number of unique items that Discovery	Int32	×
	Accelerator has placed on hold.		
TotalArchives	The number of Enterprise Vault archives that	Int32	×
	the search has queried.		

SearchDetails - The SearchDetails dataset retrieves the details of searches in all cases.

Field	Description	Data Type Nullable
CustomerID	The identifying number that Discovery	Int32 ×
	Accelerator has assigned to the customer.	
CaseID	The identifying number that Discovery	Int32 ×
	Accelerator has assigned to the case.	



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SearchID	The identifying number that Discovery	Int32	×
	Accelerator has assigned to the search.		
TemplateName	The search template name.	String	✓
ScheduleName	The name of the search schedule.	String	\checkmark
SearchType	Whether the search ran immediately or at a	Int32	×
	scheduled time.		
ScheduleStart	The start date of the scheduled search.	DateTime	\checkmark
ScheduleEnd	The end date of the scheduled search.	DateTime	\checkmark
AutoAccept	Whether the search results are added to the	Boolean	×
	review set automatically. Possible values are		
	true and false.		
OnlyNew	Whether the search results include the items	Int32	×
	that have previously been captured and added		
	to the review set or only newly captured items.		
	Possible values are 1 and 0.		

Searches - The Searches dataset provides information on all case searches.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Discovery	Int32	×
	Accelerator has assigned to the customer.		
CaseID	The identifying number that Discovery	Int32	×
	Accelerator has assigned to the case.		
RunDate	The date and time at which the search was	DateTime	\checkmark
	run.		
SearchName	The name that the creator of the search has	String	\checkmark
	assigned to it.		
SearchID	The identifying number that Discovery	Int32	×
	Accelerator has assigned to the search.		
Status	The status of the search, such as Pending	String	\checkmark
	Acceptance, In Progress, Accepted, Failed, or		
	Completed.		
NumberOfArchives	The number of archives that Discovery	Int32	\checkmark
	Accelerator has searched.		
PercentageComplete	The progress of the search, expressed as a	Int32	×

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	percentage value.		
NumberOfHits	The number of hits that the search has	Int32	\checkmark
	generated.		
NumberOfUniqueHits	The number of items that the search has	Int32	×
	retrieved that no other search in the case has		
	retrieved.		
SearchSubName	The name of the Discovery Accelerator user	String	\checkmark
	who submitted the search.		

ProductionRun - The ProductionRun dataset retrieves the same values as the "Production Run" report. This report provides information on the items in each production run for a selected case.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Discovery	Int32	×
	Accelerator has assigned to the customer.		
CaseID	The identifying number that Discovery	Int32	×
	Accelerator has assigned to the case.		
ProductionName	The name that the initiator of the production	String	\checkmark
	run has assigned to it.		
ProductionID	The identifying number that Discovery	Int32	×
	Accelerator has assigned to the production		
	run.		
CompletionDate	The date and time at which the production run	DateTime	\checkmark
	was completed.		
BatesID	The identifying Bates number or export	String	\checkmark
	number of the item.		
DAID	The identifying number that Discovery	Int64	\checkmark
	Accelerator has assigned to the item.		
SaveSetID	The identifier of the saveset (.DVS) file that	String	\checkmark
	contains the item.		
Status	How far the production of this item has	String	\checkmark
	progressed.		
ArchiveID	The identifier that Enterprise Vault has	String	\checkmark
	assigned to the archive in which the item is		
	stored.		



ArchiveName	The name of the Enterprise Vault archive.	String	✓
Location	The location in the user's mailbox from which	String	\checkmark
	the item was archived.		
LatestReviewer	The reviewer to whom this item was assigned.	String	\checkmark
LatestComment	The last comment that a reviewer has	String	\checkmark
	assigned to the item.		
MailDate	The date on which the item was sent.	DateTime	\checkmark
Author	The author of the item.	String	\checkmark
Recipients	The recipients of the item. This may not be a	String	\checkmark
	full list because it can contain up to 256		
	characters only.		
Subject	The subject line of the item.	String	\checkmark
SearchName	The searches that match this item.	String	\checkmark
NumberOfDuplicates	The number of items that Discovery	Int32	×
	Accelerator excluded from the production run		
	because they are duplicates of or similar to		
	other items.		

ProductionRunDuplicates - The ProductionRunDuplicates dataset retrieves the same values as the "Production Run Duplicates" report. This report lists duplicate items that Discovery Accelerator has found because you chose to enable deduplication when you conducted a production run.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Discovery Accelerator	Int32	×
	has assigned to the customer.		
CaseID	The identifying number that Discovery Accelerator	Int32	\checkmark
	has assigned to the case.		
ProductionName	The name that the initiator of the production run has	String	\checkmark
	assigned to it.		
ProductionID	The identifying number that Discovery Accelerator	Int32	×
	has assigned to the production run.		
CompletionDate	The date and time at which the production was	DateTime	\checkmark
	completed.		
DuplicateDAID	The identifying number that Discovery Accelerator	Int64	×
	has assigned to the duplicate item.		
DAID	The identifying number of the item that this item	Int64	\checkmark
	duplicates.		



SaveSetID	The identifier of the saveset (.DVS) file that contains	String	\checkmark
	the duplicate item.		
ArchiveID	The identifier that Enterprise Vault has assigned to	String	\checkmark
	the archive in which the duplicate item is stored.		
ArchiveName	The name of the Enterprise Vault archive.	String	\checkmark
Location	The location in the user's mailbox from which the	String	\checkmark
	item was archived.		
LatestReviewer	The reviewer to whom this duplicate item was	String	\checkmark
	assigned.		
LatestComment	The last comment that a reviewer has assigned to	String	\checkmark
	the duplicate item.		
MailDate	The date on which the duplicate item was sent.	DateTime	\checkmark
Author	The author of the duplicate item.	String	\checkmark
Recipients	The recipients of the duplicate item. This may not	String	\checkmark
	be a full list because it can contain up to 256		
	characters only.		
Subject	The subject line of the duplicate item.	String	\checkmark
SearchName	The searches that match this duplicate item.	String	\checkmark

Productions - The Productions dataset retrieves the same values as the "Productions " report. This report provides information on the production runs that you have conducted for a selected case.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Discovery Accelerator has	Int32	×
	assigned to the customer.		
CaseID	The identifying number that Discovery Accelerator has	Int32	×
	assigned to the case.		
ProductionName	The name that the initiator of the production run has	String	\checkmark
	assigned to it.		
ProductionID	The identifying number that Discovery Accelerator has	Int32	×
	assigned to the production.		
CompletionDate	The date and time at which the production was	DateTime	\checkmark
	completed.		
TypeID	The identifying number that Discovery Accelerator has	Int32	×
	assigned to the type of run.		
Status	How far the production of this item has progressed.	String	\checkmark



Туре	Whether this is a production run or export run.	String	\checkmark
BeginID	The identifying number of the first item in the production. -1 means None.	String	✓
EndID	The identifying number of the last item in the production. -1 means None.	String	√
NumberOfItems Produced	The number of items in the production run or export run.	Int32	✓
SearchName	The name of the search with which you selected the items for production or export.	String	✓
Mark	The name of the review mark with which you selected the items for production or export.	String	✓
ExcludeItems	The option for excluding duplicate or similar items that you selected when you defined the criteria for the production run or export run.	Int32	✓
NumberOfDuplic ateltems	The number of items in the production run or export run that are duplicates of or similar to other items in the run.	Int32	✓
IncludeJournalR ecipients	Whether you have chosen to include recipient information from the journal envelope of journal items.	Boolean	√
ProductionLocati on	The path to the folder on the file system where you can find the produced or exported items.	String	✓

UserRolesAndPermissions - The UserRolesAndPermissions dataset provides information on the users who have access to the selected case, and their associated roles and permissions.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Discovery Accelerator	Int32	×
	has assigned to the customer.		
CaseID	The identifying number that Discovery Accelerator	Int32	×
	has assigned to the case.		
RoleID	The identifying number that Discovery Accelerator	Int32	×
	has assigned to each role.		
RoleName	The security role in Discovery Accelerator.	String	\checkmark
UserOrGroupName	The users who have access to this case and their	String	\checkmark
	roles within it.		



UserType	Type of user as defined in Discovery Accelerator.	String	\checkmark
Status	Status of the role. Possible values are System (ID is	String	✓
	70), Folder Owner Role (ID is 78), Search (ID is 79),		
	Review (ID is 320), and Export (ID is 321).		
AllowPermissions Th	ne permissions that you have assigned to Discovery	String	\checkmark
	Accelerator users and groups with the specified role.		
DenyPermissions Th	e permissions that users and groups with the specified	String	\checkmark
	role cannot have, even if they occupy other roles that		
	grant the permissions to them.		

Compliance Accelerator Datasets:

The following is a table that details the CA datasets. The table lists each fieldname within the dataset, a description, the Data Type, and if the field is Nullable or not (* = False, $\checkmark =$ True)

ActionStatusDetail - The ActionStatusDetail dataset provides a history of actions taken on a specific item by a reviewer.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Compliance Accelerator	Int32	×
	has assigned to the customer.		
DepartmentID	The identifying number that Compliance Accelerator	Int32	×
	has assigned to the department.		
ItemID	The identifying number that Compliance Accelerator	Int64	×
	has assigned to the item.		
Date	The date and time when the status was marked.	DateTime	×
ActionStatus	The status of the message.	String	\checkmark
Reviewer	The name of the reviewer.	String	✓

Customers - The Customers dataset provides information about the SQL database in which Compliance Accelerator stores details of departments, user roles, search results, and more.

Field	Desc	ription				Data Type	Nullable
CustomerID	The	identifying	number	that	Compliance	Int32	×
	Accel	erator has as	signed to th	ne custo	omer.		



CustomerName	The name of the customer.	String	\checkmark
DirectoryDNS	The DNS name of the Enterprise Vault Directory	String	\checkmark
	service computer.		
SQLServer	The SQL Server on which the customer database	String	\checkmark
	resides.		
Database	The name of the customer database.	String	\checkmark

Departments - The Departments data model contains information on all cases across all department databases.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Compliance Accelerator has assigned to the customer that belongs to the customer.	Int32	×
DepartmentID	The identifying number that Compliance Accelerator has assigned to the department.	Int32	×
DepartmentNa me	The name of the department.	String	\checkmark
Status	The status of the department whether Open or Closed.	String	\checkmark
CreatedDate	The creation date of the department.	DateTime	×
ModifiedDate	The modified date of the department.	DateTime	×

DifferentialSamplingSummaryByDepartment - The

DifferentialSamplingSummaryByDepartment dataset returns the same values as the "Differential Sampling Summary by Department" report. For the selected sampling period, the Differential Sampling Summary by Department report summarizes the sampling activity for the monitored employees in selected departments.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Compliance	Int32	×
	Accelerator has assigned to the customer.		
DepartmentID	The identifying number that Compliance Accelerator has assigned to the department.	Int32	×
EmployeeName	The display name of the employee.	String	✓
EmployeeID	The ID of the employee.	Int32	\checkmark
PolicySampled	The total number of items sampled by policy.	Int32	×

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SearchSampled	The total number of items sampled by search.	Int32	×
SearchDuplicates	The total number of duplicate items found by search.	Int32	*
RandomSampled	The total number of items sampled by random sampling.	Int32	×
TotalSampled	The total number of items sampled by policy, search, and random sampling.	Int32	×
TotalMessages	The total number of items.	Int32	×

EscalationHistory - The EscalationHistory dataset shows the escalation history for a specific item.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Compliance	Int32	×
	Accelerator has assigned to the customer.		
DepartmentID	The identifying number that Compliance Accelerator has assigned to the department.	Int32	×
ItemID	The identifying number that Compliance	Int64	×
	Accelerator has assigned to the item.		
Date	The date and time when the Note/comment was	DateTime	×
	added.		
Action	The action taken by the reviewer.	String	\checkmark
Reviewer	The name of the reviewer.	String	\checkmark
OnBehalfOf	The name of the principal reviewer or supervisor for whom the user is acting as a delegate.	String	√

ItemAgingByDepartment - The ItemAgingByDepartment dataset returns the same values as the "Item Aging by Department" report. For the selected departments, this report shows the number of items that are either still un-reviewed or pending review. The report also gives an indication of how long each item has awaited review since it was first captured.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Compliance Accelerator	Int32	×
	has assigned to the customer.		
DepartmentID	The identifying number that Compliance Accelerator	Int32	×
DoparanonaiD	has assigned to the department.	IIIIOZ	
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ureRange	and are either still unreviewed or pending review.		
0to29Days			
MessagesInCapt	The number of messages captured in last 30-59 days	Int32	×
ure	and are either still unreviewed or pending review.		
Range30to59Da	Range 30 to 59 days		
ys			
MessagesInCapt	The number of messages captured in last 60-89 days	Int32	×
ureRange60to89	and are either still unreviewed or pending review.		
Days			
TotalMessages	The total number of messages.	Int32	×

QuestionedItemsByDepartment – The QuestionedItemsByDepartment dataset returns the same values as the "Questioned Items by Department" report. For each department, this report gives a summary of the suspect items (those items that reviewers have marked as Questioned).

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Compliance Accelerator	Int32	×
	has assigned to the customer.		
DepartmentID	The identifying number that Compliance Accelerator	Int32	×
	has assigned to the department.		
ItemID	The identifying number that Compliance Accelerator	Int64	×
	has assigned to the item.		
SentDate	The date and time the item was sent.	DateTime	\checkmark
Comment	The last comment the reviewer added to the item.	String	\checkmark
Sender	The person who sent the item.	String	\checkmark
Recipients	The recipients of the item. Compliance Accelerator	String	\checkmark
	lists all the recipients, if possible, but it may truncate		
	the list when there are a large number of recipients.		

ReviewActivitySummary - The ReviewActivitySummary dataset returns the same values as the "Review Activity Summary by Department" report. This report shows the total number of items of each type that Compliance Accelerator has captured in the selected reporting period. The report also shows the review status of these items.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Compliance Accelerator	Int32	×
	has assigned to the customer.		
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DepartmentID	The identifying number that Compliance Accelerator	Int32	×
	has assigned to the department.		
MTID	Message type ID	Int32	×
MessageType	The types of items that Compliance Accelerator may	String	\checkmark
	add to the review set. For Exchange, fax, Domino,		
	and SMTP, the report shows three item types:		
	 Internal: The items where the author and all recipients are internal to the organization. 		
	 External Inbound: The items where the author is external to the organization and at least one recipient is internal. 		
	 External Outbound: The items where the author is internal to the organization and at least one recipient is external. 		
Unreviewed	The number of items in the case review set that	Int32	×
	reviewers have yet to mark.		
Reviewed	The number of items in the case review set that	Int32	×
	reviewers have marked.		
Pending	The number of items in the case review set that have	Int32	×
	a status of Pending.		
Questioned	The number of items in the case review set that have	Int32	×
	a status of Questioned.		
ReviewedRele vant	The number of reviewed items that are marked as relevant.	Int32	√

ReviewerActivityByDepartment – The ReviewerActivityByDepartment dataset returns the same values as the "Reviewer Activity by Department" report. For each department, this report shows the status of review set items, including how many items have been escalated, questioned, reviewed, and un-reviewed.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Compliance Accelerator	Int32	×
	has assigned to the customer.		
DepartmentID	The identifying number that Compliance Accelerator	Int32	×
	has assigned to the department.		
Status	The status of the reviewed item.	String	\checkmark
Mark	Name of marking such as "Questioned", "Reviewed	String	\checkmark
	Relevant", or "Reviewed Irrelevant".		
Messages	Total number of messages with corresponding Status	Int32	×

and Mark.

ReviewerActivityByDepartmentDetailed – The ReviewerActivityByDepartmentDetailed dataset returns more details of the "Reviewer Activity by Department" report. For each department, this report shows the status of review set items, including how many items are questioned, reviewed, and un-reviewed.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Compliance Accelerator	Int32	×
	has assigned to the customer.		
DepartmentID	The identifying number that Compliance Accelerator	Int32	×
	has assigned to the department.		
ItemID	The identifying number that Compliance Accelerator	Int64	×
	has assigned to the item.		
Status	The status of the reviewed item.	String	\checkmark
Author	The author of the item.	String	\checkmark
Subject	The subject line of the item.	String	\checkmark
Direction	The direction of the message whether internal, external	String	\checkmark
	inbound, or external outbound.		
MessageType	The message type whether internal, external inbound,	String	\checkmark
	or external outbound.		
Mark	Name of marking such as "Questioned", "Reviewed	String	\checkmark
	Relevant", or "Reviewed Irrelevant".		

ReviewerActivityByReviewer - The ReviewerActivityByDepartment dataset shows the status of the review set items for each reviewer.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Compliance Accelerator has assigned to the customer.	Int32	×
DepartmentID	The identifying number that Compliance Accelerator has assigned to the department.	Int32	×
Status	The status of the reviewed item.	String	\checkmark
Mark	The marking status ("Questioned", "Reviewed Relevant", or "Reviewed Irrelevant") and escalation status ("Escalated").	String	\checkmark
ReviewerNam e	The name of the reviewer.	String	\checkmark
ReviewerLogi	The login name of the reviewer.	String	\checkmark



nName		
Total	The total number of items with the given status and marking Int32	×
	for the specific reviewer.	

ReviewerActivityDetail – The ReviewerActivityDetail dataset returns the same values as the "Reviewer Activity Detail" report. This report shows the status of the review set items for each reviewer for each department.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Compliance Accelerator has	Int32	×
	assigned to the customer.		
DepartmentID	The identifying number that Compliance Accelerator has	Int32	×
	assigned to the department.		
Reviewer	The name of the reviewer.		\checkmark
MarkID	The mark ID. Possible values are 1 (Unreviewed), 2	Int32	×
	(Pending), 3 (Questioned), 5 (Reviewed Irrelevant), 6		
	(Reviewed Relevant).		
StatusID	The ID of the status of marking. Possible values are 1	Int32	×
	(Unreviewed), 2 (Pending), 3 (Reviewed), 4 (To Produce),		
	5 (Produced), 6 (Questioned), 7 (Ready to produce), 8		
	(Producing), 9 (In production), 10 (Start production).		
Mark	The mark on the item such as "Unreviewed", "Pending",	String	\checkmark
	"Questioned", "Reviewed Irrelevant", and "Reviewed		
	Relevant".		
Status	The mark status such as "Unreviewed", "Pending",	String	\checkmark
	"Reviewed", "To Produce", "Produced", "Questioned",		
	"Ready to produce", "Producing", "In production", and		
	"Start production".		
Messages	Total number of messages with corresponding Status and	Int32	×
	Mark.		
OnBehalfOf	The name of the principal reviewer or supervisor for whom	String	\checkmark
	the user is acting as a delegate.		
DelegationFlag	Further defines the meaning of the value in OnBehalfOf.	String	\checkmark
	There are three possible values:		
	 B: Indicates that the person specified in the Reviewer field has reviewed messages from the 		

review set of the person specified in the OnBehalfOf field.

- T: Indicates that the person specified in the OnBehalfOf field has reviewed messages from the review set of the person specified in the Reviewer field.
- U: Indicates that the person specified in the OnBehalfOf field should be ignored.

ReviewerActivityItemDetailed – The ReviewerActivityItemDetailed dataset returns the detailed information of the "Reviewer Activity Detail" report. This report shows the status of the review set items for each reviewer.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Compliance Accelerator has assigned to the customer.	Int32	×
DepartmentID	The identifying number that Compliance Accelerator has assigned to the department.	Int32	×
ItemID	The identifying number that Compliance Accelerator has assigned to the item.	Int64	×
Mark	The marking status ("Questioned", "Reviewed Relevant", or "Reviewed Irrelevant") and escalation status ("Escalated").	String	✓
Reviewer	The name of the reviewer.	String	\checkmark
DataType	The review type. 0 indicates Standard review and 1 indicates Escalation review.	Int32	×
ActionStatus	The status of the action such as "Reviewed", "Escalated", or "Pending".	String	~
MessageAuthor	The author of the message.	String	\checkmark
Subject	The subject of the message.	String	\checkmark
MailDate	The date on which the item was sent.	DateTime	\checkmark
OnBehalfOf	The name of the principal reviewer or supervisor for whom the user is acting as a delegate.	String	√
DelegationFlag	Indicates if the record is delegated for review or not. Possible values are, 'U' - undelegated review; 'T' - item is reviewed by delegates; and 'B' - marked by original reviewer for delegated reviews. For delegated reviews,	String	~



by the delegate and 'B' - if marked by the original

reviewer.

ReviewerNotes - The ReviewerNotes dataset provides information about notes reviewers have added for a specific item including the note text.

Field	Description	Data Type	Nullable
CustomerID	The identifying number that Compliance Accelerator has	Int32	×
	assigned to the customer.		
DepartmentID	The identifying number that Compliance Accelerator has	Int32	×
	assigned to the department.		
ItemID	The identifying number that Compliance Accelerator has	Int64	×
	assigned to the item.		
DateAndTime	The date and time when the note was added.	DateTime	×
Reviewer	The name of the reviewer.	String	\checkmark
ReviewersNote	The actual text of the note.	String	✓



Appendix B: 12.1 Datasets

Listed below are the five new Enterprise Vault 12.1 DA and CA Datasets and the mandatory and optional parameters to use when performing the queries. Please note that the syntax in these examples is case-sensitive except for the server name. Always specify a **customerID** when accessing these datasets.

12.1 Discovery Accelerator Datasets

SearchCriteria

The **SearchCriteria** dataset gets information on one or all of the searches that have been conducted in one or all of the cases.

How to access

http://server_name/DAReporting/OData/SearchCriteria(customerID=1,caseID=3,searchID=10)

Returns the values for a specific search whose ID is 10 and a case with an ID of 3.

Parameter	Description
customerID	Mandatory. Specifies the customer for which you want information.
caseID	Optional. Indicates the particular case belonging to the specified customer for which you want information. If this parameter is not specified, the query fetches information for all the cases for the specified customer.
searchID	Optional. Indicates the search for which you want information. If this parameter is not specified, the query fetches information for all the searches for the specified caseID. If the caseID is not specified, the query fetches information about all the searches in all the cases for the specified customer.

Table 1 – SearchCriteria Parameters

Field	Туре	Description
SearchType	String	Specifies whether the search ran immediately or at a scheduled time.
AutomaticallyAcceptSearchResults	Boolean	Specifies whether the option to automatically accept the search results into the review set was selected when configuring the search criteria.
IncludeItemsAlreadyInReview	Boolean	Specifies whether the search results included the items that you have previously captured and added to the review set.
BasedOnSearch	String	Specifies whether this search was based on an existing search.
DateRange	DateTime	The date range that was specified in the search criteria.
SearchTerms		
Field	String	The search criteria that Discovery Accelerator used to search for items. Possible values are From, To, To or from, Subject, Content, Subject or Content, and All.
Values	String	The words or phrases that Discovery Accelerator searched for.



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Operator	String	The operator that was used to search the specified keywords. Possible values are Any of and All of.		
AttachmentCriteria				
Count	Integer	The required number of attachments that the item must have to be considered for this search.		
Extensions	String	The file name extensions of particular types of attachments on which items were searched.		
MiscellaneousCriteria				
IncludeNonIndexedItems	Boolean	Specifies whether non-indexed items were considered in the search results, such as binary files and encrypted mail items.		
MessageSize	Int32	The size in kilobytes of each item that was specified as the basis for this search. The item size includes the size of any attachments.		
MessageTypes	String	The message type that was searched for. Possible values are Exchange, IM, Bloomberg, and Fax.		
RetentionCategories	String	The retention category that was specified as the basis for this search.		
SiteName	String	The name of the Enterprise Vault site.		
Policies				
SearchPolicyType	String	The classification policies that were used for this search. Possible values are Inclusion, Exclusion, and Category.		
PolicyName	String	The name of the policy.		
PolicyType	String	The classification policies that were used to search for the items. Possible values are All, Ignore exclusions, Inclusions only, Exclusions only, Categories only, Ignore inclusions, and Ignore inclusions and exclusions.		
CustomAttributes				
CustomAttribute	String	The name of the custom attribute.		
Operator	String	The operator that was used to search the specified keywords. Possible values are Any, All, Exact, and Phrase.		
Values	String	The words or phrases that Discovery Accelerator searched for.		
SearchID	Int32	The identifying number that Discovery Accelerator has assigned to the search.		
Name	String	The name that the creator of the search has assigned to it.		
CaseID	Int32	The identifying number that Discovery Accelerator has assigned to the case.		
RunDate	DateTime	The date and time at which the search was run.		

Table 2 – SearchCriteria Fields



ItemDetails

For the specified customer database, the **ItemDetails** dataset gets information on the items in one or all of the cases.

How to access:

http://server_name/DAReporting/OData/ItemDetails(customerID=1) Returns the details for all the cases associated with the customer whose ID is 1.

http://server_name/DAReporting/OData/ItemDetails(customerID=1,caseID=10)

Returns the details for case ID 10 associated with the customer whose ID is 1.

Parameter	Description
customerID	Mandatory. Specifies the customer for which you want information.
caseID	Optional. Indicates the particular case belonging to the specified customer for which you want information. If this parameter is not specified, the query fetches information for all the cases for the specified customer.
totalCount	<pre>Optional. Returns the ItemCount dataset, which provides the total count of records for the specified query along with the date and time when the query was executed in yyyy-mm-dd hh:mm:ss format. Possible values aretrue or false. The default value is false. For example, /ItemDetails(customerID=2,totalCount=true) returns the following output "odata.type":"EnterpriseVault.Reporting.DiscoveryAccelerator.ItemCount ","TotalCount":"4256,"TimeStamp":"2016-05-26T03:41:19.617"</pre>
startFrom	<pre>Optional, must be used with recordsPerFetch. Indicates the starting number of the record from the batch of records to be returned. Default value is 1. For example, for 350 records with recordsPerFetch specified as 100 you must run the query as follows to get all the records: •/ItemDetails(customerID=6, startFrom=1, recordsPerFetch=100) - returns records from 1 to 100 •/ItemDetails(customerID=6, startFrom=101, recordsPerFetch=100) - returns records from 101 to 200 •/ItemDetails(customerID=6, startFrom=201, recordsPerFetch=100) - returns records from 201 to 300 •/ItemDetails(customerID=6, startFrom=301, recordsPerFetch=100) - returns records from 301 to 350</pre>
recordsPerFetch	Optional, must be used with startFrom. Indicates the batch size of records to be returned per fetch. Default value is 100000. Note that if the size of records is large, this query may fail to fetch the records. If the total number of records exceeds the count specified in recordsPerFetch, the web service displays a next page link to get to the next set of records. The last set of records does not contain any next link. For example, for 350 records with recordsPerFetch specified as 100, the web service returns the following next page links on each successive screen], "odata.nextLink": "http://localhost/dareporting/oData/ItemDetails(cus tomerID=1, startFrom=101, recordsPerFetch=100)" This URL returns records from 101 to 200.



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],"odata.nextLink":"http://localhost/dareporting/oData/ItemDetails(cus tomerID=1,startFrom=201,recordsPerFetch=100)"

This URL returns records from 201 to 300.

],"odata.nextLink":"http://localhost/dareporting/oData/ItemDetails(cus tomerID=1,startFrom=301,recordsPerFetch=100)"

This URL returns records from 301 to 350.

Table 3 – ItemDetails Parameters

Field	Туре	Description
CustomerID	Int32	The identifying number that Discovery Accelerator has assigned to the customer.
CaseID	Int32	The identifying number that Discovery Accelerator has assigned to the case.
DAID	Int64	The identifying number that Discovery Accelerator has assigned to the item.
SaveSetID	String	The identifier of the saveset ($\ensuremath{\texttt{DVS}}\xspace)$ file that contains the item.
ArchiveID	String	The identifier that Enterprise Vault has assigned to the archive in which the item is stored.
ArchiveName	String	The name of the Enterprise Vault archive.
MailDate	DateTime	The date on which the item was sent or received.
Author	String	The email address of the person who sent the item.
Recipients	String	The recipients of the item. This may not be a full list because it can contain up to 256 characters only.
Subject	String	The subject line of the item.
LatestMark	String	The last mark that a reviewer has assigned to the item.
LatestComment	String	The last comment that a reviewer has assigned to the item.

Table 4 – ItemDetails Fields

12.1 Compliance Accelerator Datasets

SamplingSummary

The **SamplingSummary** dataset provides the statistical information of items that Enterprise Vault has processed for sampling by Compliance Accelerator. This information includes the number of items that were considered for sampling and the number of items that were sent to Compliance Accelerator after Enterprise Vault processed the items based on classification rules.

How to access

http://server_name/CAReporting/OData/SamplingSummary(customerID=2,departmentID=8,dateFro m=2014-04-10,dateTo=2014-05-10)

Returns the daily statistics of items that were sampled by Enterprise Vault for each monitored employee for the specified department and date range.

Parameter	Description
customerID	Mandatory. Specifies the customer for which you want information.
departmentID	Optional. Indicates the particular department belonging to the specified customer for which you want information. If this parameter is not specified, the query fetches information for all the departments for the specified customer.



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dateFrom	Optional, must be used with dateTo. Indicates the start date of the date range you want to fetch records for. The date should be in YYYY-MM-DD format. The default start date is one year before the date on which the query is run.
dateTo	Optional, must be used with dateFrom. Indicates the end date of the date range you want to fetch records for. The date should be in YYYY-MM-DD format. The default value is the date when the query is run.

Table 5 – SamplingSummary Parameters

Field	Туре	Description
CustomerID	Int32	The identifying number that Compliance Accelerator has assigned to the customer.
DepartmentID	Int32	The identifying number that Compliance Accelerator has assigned to the department.
Date	DateTime	The date when Enterprise Vault processed the items belonging to this employee.
EmployeeID	Int32	The ID of the employee.
EmployeeName	String	The display name of the employee.
ItemTypeID	Int32	The message type ID, which specifies the message content source along with the direction. Possible values are 0 (NotSpecified), 1 (Exchange), 2 (InstantMessaging), 3 (Bloomberg), 4 (Fax), 5 (Lotus), 6 (FSA), 7 (SMTP), 8 (Sharepoint), 9 (Social), and 10 (IMAP).
Direction	String	The direction of the message (internal, external inbound, or external outbound).
CaptureType	Int32	 Specifies the reason for which the item is considered for sampling. Possible values are as follows: 2 : Indicates that items are randomly captured 6 : Indicates that the item is sampled and captured based on guaranteed sample search. 10 : Indicates that the item is sampled and considered as a duplicate during guaranteed sample search results deduplication. 99: Indicates that the item is captured based on classification inclusion rules.
SamplingPotential	Int32	The total number of items that Enterprise Vault considered for sampling.
DuplicationDiscard	Int32	The number of items that were not sampled because they were duplicates of other items.
StatisticalDiscard	Int32	The total number of items that Enterprise Vault did not include for statistical sampling. This number is 0 if you chose guaranteed sampling.
ClassificationDiscard	Int32	The total number of items that Enterprise Vault classified with the property "evaction.discard" and did not send to Compliance Accelerator for sampling.
ClassificationExclude	Int32	The total number of items that Enterprise Vault classified with the property "evtag.exclusion" and did not send to Compliance Accelerator for sampling.
MessageDiscard	Int32	The total number of items that are specific to Exchange Server that Enterprise Vault did not include for sampling. The items include delivery reports, read receipts, out-of-office replies, quota warnings, and system messages.



|--|

IngestToCA	Int32	The total number of items that Enterprise Vault sent to
		Compliance Accelerator for sampling for the given department,
		message type, capture type, direction, and employee.

Table 6 – SamplingSummary Fields

GuaranteedSamplingSummary

The **GuaranteedSamplingSummary** dataset provides statistical information of items that Compliance Accelerator has processed in guaranteed sampling mode.

How to access

http://server_name/CAReporting/OData/GuaranteedSamplingSummary(customerID=2,departmentID= 8,dateFrom=2015-04-24,dateTo=2016-04-24)

Returns the daily statistics of items that were sampled in guaranteed sampling mode for each monitored employee for the specified department and date range.

Parameter	Description
customerID	Mandatory. Specifies the customer for which you want information.
departmentID	Optional. Indicates the particular department belonging to the specified customer for which you want information. If this parameter is not specified, the query fetches information for all the departments for the specified customer.
dateFrom	Optional, must be used with dateTo. Indicates the start date of the date range you want to fetch records for. The date should be in YYYY-MM-DD format. The default start date is one year before the date on which the query is run.
dateTo	Optional, must be used with dateFrom. Indicates the end date of the date range you want to fetch records for. The date should be in YYYY-MM-DD format. Default value is the date when the query is run.

Table 7 – GuaranteedSamplingSummary Parameters

Field	Туре	Description
CustomerID	Int32	The identifying number that Compliance Accelerator has assigned to the customer.
DepartmentID	Int32	The identifying number that Compliance Accelerator has assigned to the department.
Date	DateTime	The date when Enterprise Vault processed the items belonging to this employee.
EmployeeID	Int32	The ID of the employee.
EmployeeName	String	The display name of the employee.
ItemTypeID	Int32	The message type ID, which specifies the message content source along with the direction. Possible values are 0 (NotSpecified), 1 (Exchange), 2 (InstantMessaging), 3 (Bloomberg), 4 (Fax), 5 (Lotus), 6 (FSA), 7 (SMTP), 8 (SharePoint), 9 (Social), and 10 (IMAP).
Direction	String	The direction of the message (internal, external inbound, or external outbound).



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CaptureType	Int32	Specifies the reason for which the item is considered for sampling. Possible values are as follows:
		• 2 : Indicates that items are randomly captured
		• 6 : Indicates that the item is sampled and captured based on guaranteed sample search.
		• 10 : Indicates that the item is sampled and considered as a duplicate during guaranteed sample search results deduplication.
		• 99: Indicates that the item is captured based on classification inclusion rules.
IngestToCA	Int32	The total number of items that Enterprise Vault sent to Compliance Accelerator for sampling for the given department, message type, direction, capture type and employee.
GSSSampled	Int32	The number of items that are sampled and captured based on guaranteed sample search.
GSSDuplicate	Int32	The number of items that are sampled and detected as duplicate during guaranteed sample search results deduplication.
PolicySampled	Int32	The number of items that are sampled and have associated policies.
RandomSampled	Int32	The number of items that are randomly sampled.
RelevantSampled	Int32	The number of items out of sampled that are marked as Relevant by Compliance Accelerator Intelligent review.

Table 8 – GuaranteedSamplingSummary Fieldss

StatisticalSamplingSummary

The **StatisticalSamplingSummary** dataset provides statistical information of items that Compliance Accelerator has processed in statistical sampling mode.

How to access

http://server_name/CAReporting/OData/StatisticalSamplingSummary(customerID=32,departmentID=10,d ateFrom=2015-01-21,dateTo=2016-01-21)

Returns the daily statistics of items that were sampled in statistical sampling mode for each monitored employee for the specified department and date range.

Parameter	Description
customerID	Mandatory. Specifies the customer for which you want information.
departmentID	Optional. Indicates the particular department belonging to the specified customer for which you want information. If this parameter is not specified, the query fetches information for all the departments for the specified customer.
dateFrom	Optional, must be used with dateTo. Indicates the start date of the date range you want to fetch records for. The date should be in YYYY-MM-DD format. The default start date is one year before the date on which the query is run.
dateTo	Optional, must be used with dateFrom. Indicates the end date of the date range you want to fetch records for. The date should be in YYYY-MM-DD format. Default value is the date when the query is run.

Table 9 – StatisticalSamplingSummary Parameters

Field	Туре	Description
CustomerID	Int32	The identifying number that Compliance Accelerator has assigned to the customer.



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DepartmentID	Int32	The identifying number that Compliance Accelerator has assigned to the department.
Date	DateTime	The date when Enterprise Vault processed the items belonging to this employee.
EmployeeID	Int32	The ID of the employee.
EmployeeName	String	The display name of the employee.
ItemTypeID	Int32	The message type ID, which specifies the message content source along with the direction. Possible values are 0 (NotSpecified), 1 (Exchange), 2 (InstantMessaging), 3 (Bloomberg), 4 (Fax), 5 (Lotus), 6 (FSA), 7 (SMTP), 8 (Sharepoint), 9 (Social), and 10 (IMAP).
Direction	String	The direction of the message (internal, external inbound, or external outbound).
CaptureType	Int32	 Specifies the reason for which the item is considered for sampling. Possible values are as follows: 2 : Indicates that items are randomly captured 99: Indicates that the item is captured based on classification inclusion rules.
IngestToCA	Int32	The number of total items that Enterprise Vault sent to Compliance Accelerator for sampling for the given department, message type, direction, capture type and employee.
CappingDiscard	Int32	The number of items that were discarded when statistical capping is configured in Compliance Accelerator. If capping is not applied, the value here is 0.
PolicySampled	Int32	The number of items that are sampled and have associated policies.
RandomSampled	Int32	The number of items that are randomly sampled.
RelevantSampled	Int32	The number of items out of sampled that are marked as Relevant by Compliance Accelerator Intelligent review.

Table 10 – StatisticalSamplingSummary Fields



Appendix C Supported Query Options

Query Options are query string parameters a client can specify to control the data that the reporting service returns for the query and format of the data. As such, query options can only be used on dataset fields returned by the report, and not on the dataset parameters required to run the report. The names of all query options are prefixed with a "\$" character. The reporting service includes a subset of query options defined by the OData specification. Listed below are the query options supported by the DA and CA reporting services.

Format Query Option (\$Format)

This query option specifies the format of the response. If the \$format query option is present in a request it takes precedence over the value(s) specified in the Accept request header. Supported values for the \$format query string option are listed in the following table.

\$format Value	Response Media Type
application/atom+xml	application/atom+xml
application/Jason	application/ json
application/jasonfull	application/json verbose

Filter Query Option (\$filter)

This query option identifies a subset of the entries returned by the query. The subset is determined by selecting only the entries that satisfy the conditional expression specified by the query option.

Listed below are examples of the supported operators.

Operator	Description	Example	Expected output
Eq	Equal	/Cases(customerID=2)?\$filter= CaseName eq 'Case1'	Returns the case having CaseName = 'Case1' from customerID =2
Ne	Not equal	/Cases (customerID=2)?\$filter= CaseName ne 'EV'	Returns the case having CaseName not equal to 'EV' from customerID =2
Gt	Greater than	/Cases (customerID=2)?\$filter= CaseID gt 10	Returns all cases having CaseID greater than 10
Ge	Greater than or equal	/Cases (customerID=2)?\$filter= CaseID ge 10	Returns all cases having CaseID greater than or equal to 10
Lt	Less than	/Cases (customerID=2)?\$filter= CaseID It 20	Returns all cases having CaseID less than 20
Le	Less than or equal	/Cases (customerID=2)?\$filter= CaseID le 100	Returns all cases having CaseID less than or equal to 100
And	Logical and	/Cases (customerID=2)?\$filter= CaseID le 200 and CaseID gt 6	Returns all cases having CaseID less than 200 and greater than 6



Or	Logical or	/Cases (customerID=2)?\$filter= CaseID le 5 or CaseID gt 200	Returns all cases having CaseID less than 5 or greater than 200
Not	Logical negation	/Cases (customerID=2)?\$filter=not endswith(CaseName,'OldCases')	Returns all cases where CaseName not ending with 'OldCases'
Arithmetic	Operators		
Add	Addition	/Productions(customerID=2)?\$filter= NumberOfItemsProduced add 5 gt 10	Return all Productions records where (NumberofItemsProduced + 5) > 10
Sub	Subtraction	/Productions(customerID=2)?\$filter= NumberOfItemsProduced sub 5 gt 10	Return all Productions records where (NumberofItemsProduced - 5) > 10
Mul	Multiplication	/Productions(customerID=2)?\$filter= NumberOfItemsProduced mul 2 gt 2000	Return all Productions records where (NumberofItemsProduced * 2) > 2000
Div	Division	/Productions(customerID=2)?\$filter= NumberOfItemsProduced div 2 gt 4	Return all Productions records where (NumberofItemsProduced % 2) > 4
Grouping (Operators		
()	Precedence grouping	/Productions(customerID=2)?\$filter=(N umberOfItemsProduced sub 5) gt 10	Return all Productions records where (NumberofItemsProduced – 5) > 10

Select Query Option (\$select)

This query option specifies a subset of fields to return and the order in which to organize the data columns. The default is to return all columns that correspond to \$select=*.

The value of a \$select Query Option is a comma-separated list of selection clauses.

The following is a set of examples that show the usage of \$select option:

Examples:

http://<DAServername>/DAReporting/OData/Cases(customerID=<id>)?\$select=CaseName,CaseID

• This query returns only the CaseID and CaseName Property values for each Case Entry.

http://<DAServername>/DAReporting/oData/Cases(customerID=<id>)?\$select=*

• This query returns all fields for each Case for the customer identified by the customerID.

\$Тор

This option determines a maximum number of records to return.

Examples

http:// <DAServername>/DAReporting/oData/Productions(customerID=2)?\$top=2

• This query will return the top two records of the Productions report.



\$Skip

This option sets the number of records to skip before retrieving records in a collection.

Examples

http:// <DAServername>/DAReporting/oData/Productions(customerID=2)?\$skip=1

• This query will skip the first record and return all the remaining records from the Productions report



Appendix D Switching between Customer Databases

Since administrators can create multiple customer databases with CA and DA, it can be beneficial to create a report or dashboard that allows you to toggle easily between the different customer databases. The following example shows you how to create a dropdown list for your customer databases and output case information for the customer database that you select.

Creating a Customer Name Dropdown List

Highlight the Power Query tab. Select From Other Sources/From OData Feed



Figure 1 – OData Feed

Enter http://DAServerName/DAReporting/OData/Customers

Note: If you get an error about **the user was not authorized**, select the **Windows** tab and click **Connect**.) Click **OK**

Under Query Settings, name the query AllCustomerQuery



Query Settings	
▲ PROPERTIES	
Name	
AllCustomerQuery	

Figure 2 – Query Name

Select Close & Load\Close & Load To...

On the Load To window, select Table and Existing Worksheet

	×
Load To	
Select how you want to view this data in your workbook.	
III 💿 Table	
📑 🔿 Only Create Connection	
Select where the data should be loaded.	
○ New worksheet	
Existing worksheet	
\$B\$20	
Add this data to the Data Model	
	_
Load Cancel	

Figure 3 – Load To

Click Load

Click the **plus symbol** at the bottom left-hand corner of the screen to add a new worksheet.

Sheet1	•
	New sheet

Figure 4 – Add a new worksheet

In worksheet two, type Select CustomerName in cell A1.

Highlight cell B1.

A	В
1 Select CustomerName	

Figure 5 – Highlight Cell



Select Formulas/Name Manager.

Click New

FORMULAS	DATA	REVIEW	VIEW	POWER QU	JERY		5.1.00	1000			
Date & Looku Time * Referen	0 & Math & ce * Trig *	More Functions •	Name Manager	回 Define 況 Use in I 留 Create Defined N	Name 👻 Formula = from Selection ames	불의 Trace I 이션 Trace I 沃 Remov	Precedents Dependents ve Arrows * (Form	え Show Formulas 争 Error Checking 多 Evaluate Formul ula Auditing	Watch Window	Calculatic Options	Calculate N Calculate S Calculation
	}	с	D	E	F	G	Н	LI	K	L	M
							N	lame Manager			? X
					<u>N</u> ew	<u>E</u> dit	Delete				<u>F</u> ilter ▼
					Name AllCustomer	Value Qu ("2",*1	e DA_Cust1*,"ev	Refers To =Sheet1!\$B\$2:\$F	Scope \$3 Workb	Comm Io	ient

Figure 6 – Select Formulas/Name Manager

Enter CustomerName in the Name field. Enter =AllCustomerQuery[CustomerName] in the Refers to field.

	New Name ?	x
<u>N</u> ame:	CustomerName	
Scope:	Workbook 🗸	
C <u>o</u> mment:	1	^
Refers to:	- AllCustomerDuandCustomerblame1	~
	OK Can	el

Figure 7 – CustomerName

Click OK.

Click Close.

With cell **B1** still highlighted, select **Data/Data Validation/Data Validation**.

DAT	Ą	REVIEW	VIE	W POWER	QUERY				0	
ons s	2↓ ∡↓	Z A A Z Sort	Filter	Clear Reapply Advanced	Text to Columns	Flash Fill	Remove Duplicates	Data Validation ≁	□ →□ Consolidate	What-If Analysis *
			Sort & Fi	lter				😸 Data <u>V</u>	alidation	

Figure 8 – Select Data Validation

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In the Allow field, select Lis	t. In the Source field, enter =CustomerName

ettings	Input Message	Error Alert		
alidation	criteria			
Allow:				
List		✓ ✓ Ignore <u>b</u> lar	nk	
Data:		In-cell drop	odown	
betwee	n	×		
Source:				
=Custo	merName		1	
Apply	these changes to a	all other cells with th	e same sett	ings

Figure 9 – Data Validation

Click OK.

A new dropdown list for selecting the Discovery Accelerator customer databases now appears. Select a customer name from the list.

Select CustomerName					
	DA Cust1				
	DA_Cust2				

Figure 10 – Customer Database Dropdown

Creating a customerID Table

After creating the Customer Name dropdown list, we need to create a customerID Table to map the customerID to the Customer Name.

Highlight cells **B2** and **B3** and select **Insert/Table**.

F	ILE	HOME		NSERT	PAGE LA	AYOUT	FOR	MULAS	DATA	R
	Ş		?				\bigcirc		O +	
Pivo	otTable	Recomm PivotT Table:	nendeo ables	Table	Pictures	Online Pictures	Shapes •	SmartArt ions	Screenshot *	
B2	2	¥	:[Xv	f _x					
2ĺ				А				1	В	_
1	Select	Custon	nerNa	me						
2										
3										
4							-			-

Figure 11 – Insert/Table



Check My table has headers.

Click OK.



Figure 12 – Create Table

Click on the **Design** tab. (This will allow you to rename the table.)

Rename table under Table Name to CustomerIDTable.

Hit Enter.

Double-click to select Column1. Rename to CustomerID.

FILE	HOME		INSERT	PAGE L	AYOUT	FORM	IULAS	5 D/	ATA F
Table Name: CustomerIDTable IB Resize Table Properties		III S III R III R	ummarize ternove Duj Convert to F	with Pivot1 plicates lange	Table In SI	sert E	xport	Refresh	Prope © Open © Unlin
B2	*	:	X	fx	Custo	merID		extern	
1	22		А	202 - 343	S7			В	
1 Selec	t Custon	neri	Name			Cust	ome	rID	
3									

Figure 13 – Rename Table and Column

Highlight the blank, **B3** field and add the following function:

=INDEX((AllCustomerQuery[CustomerID]), MATCH(B1,AllCustomerQuery[CustomerName],0)) Note: Field **B1** should already be populated with a **CustomerName** value and the word **IF** should appear on the top, left-hand corner of the screen.

Click the Check Mark



IF	\cdot : $\times \checkmark f_x$	=INDEX{(AllCustomerQuery[Custo	omerID]),	MATCH(B1	AllCustom	erQuery[(ustomerN	ame],0))
12	A	В	С	D	E	F	G	н
1	Select CustomerName	DA_Cust1						
2		CustomerID						
3		ustomerName],0))						

Figure 14 – Adding a function

The corresponding **customerID** should now appear under the **CustomerName**. If you select the dropdown box and change the **CustomerName**, the **customerID** should change as well.

2	A	В					
1	Select CustomerName	DA_Cust1		*			
2		CustomerID	~				
3			2				

Figure 15 – CustomerName with customerID

Toggling to see cases from different Customer Databases

As a final step, we will create a Cases dataset. The Cases listed will change based upon the customer name we select.

Highlight the Power Query tab. Select From Other Sources/From OData Feed

In this example, type in the URL http://DAServername/DAReporting/OData/Cases(customerID=X) to read

the Discovery Accelerator Cases dataset. Replace **X** with a customerID value.

		×
OData Feed		
Enter the URL for an OData feed.		
URL		
http://DA/DAReporting/OData/Cases(customerID=2)		
		4
	OK Cano	el

Figure 16 – Enter URL

Click **OK**. Rename Query to **CasesQuery**.

Highlight the **CreatedDate** and **ModifiedDate** columns by pressing the **Ctrl key** and select **Data Type/Date/Time**.



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ose &	k F	Refresh review •	Proj	perties anced Edi	tor	Choose Remove Columns Columns • Manage Columns	Keep Rows	Remov Rows	educe	Remove Duplicates Remove Errors • e Rows	2↓ Z↓ Sort	Split Group Column + By	Data Type: Any Decimal Number Currency Whole Number
	 ,	Custom	erID	CaseID	Ŧ	CaseName	-	Status	¥	CreatedDate		ModifiedDate	Date/Time
Queries	1	1 2 5			Employee Discrimination		Open 12/10/2015 9:3.		2:27 PM	1/19/2016 11::	Date		
	2	2 1		6	Fraud Investigation		Open	Open 12/10/2015 9:33:17		:17 PM	1/19/2016 11::	Time	
	3			2	7	HR Issue		Open		12/10/2015 9:34	:08 PM	1/19/2016 11:	Date/Time/Timezone
	4			2	8	SEC Audit		Open		12/10/2015 9:34	49 PM	1/19/2016 11:	Duration
													Text
													True/False
													Binary

Figure 17 – Data Type

Select Close & Load/Close & Load To...

In the Load To window, select Table and Existing worksheet.

Click Load.

The Cases Dataset now appears.

CaseID 🔽	CaseName 💌	Status 💌	CreatedDate 💌	ModifiedDate 💌
5	Employee Discrimination	Open	12/10/2015 21:32	1/19/2016 19:28
6	Fraud Investigation	Open	12/10/2015 21:33	1/19/2016 19:28
7	HR Issue	Open	12/10/2015 21:34	1/19/2016 19:28
8	SEC Audit	Open	12/10/2015 21:34	1/19/2016 19:28
	CaseID 5 6 7 8	CaseID CaseName CaseName Semployee Discrimination Fraud Investigation HR Issue SEC Audit	CaseID CaseName Status Status For	CaseIDCaseNameStatusCreatedDate5Employee DiscriminationOpen12/10/2015 21:326Fraud InvestigationOpen12/10/2015 21:337HR IssueOpen12/10/2015 21:348SEC AuditOpen12/10/2015 21:34

Figure 18 – Cases Dataset

Under Workbook Queries, right-click the CasesQuery and select Edit.



Figure 19 – Edit Query

Select Advanced Editor.





Figure 20 – Advanced Editor

Delete the contents of the CasesQuery and replace with the lines below, (replace DAServerName with the name of your DA Server):

let

```
customertable = Excel.CurrentWorkbook(){[Name="CustomerIDTable"]}[Content],
```

Value0 = customertable{0}[CustomerID],

Value1 = customertable{0}[CaseID],

Source = OData.Feed("DAServerName/DAReporting/oData/Cases(customerID=" & Number.ToText(Value0, "D", "") & ")")

in

Source

XI	Advanced Editor	_ D X
	CasesQuery	Help
	<pre>let customertable = Excel.CurrentWorkbook(){[Name="CustomerIDTab Value0 = customertable{0}[CustomerID], Value1 = customertable{0}[CaseID], Source = OData.Feed("DA/DAReporting/oData/Cases(customerID=" in Source </pre>	le"]}[Conte & Number.1
	<	>
	 No syntax errors have been detected. 	
	Done	Cancel

Figure 21 – Query

Click Done.

At this point, you can choose one of two options.

Option 1:



Click **Continue** when you receive the message indicating: **Information is required about data privacy.** Choose the Privacy Levels of your choice and select **Save**.



Figure 22 – Privacy Levels

Select Close & Load.

Option 2:

Alternatively, you can select to Ignore the Privacy Levels and potentially improve performance.

Warning: Using Option 2, Power Query cannot ensure the privacy of data merged into the workbook.

perform Option 2,	select File/Options and settings/Query Options.

File	Onlines and settings
Close & Load	
Close & Load To	
Discard & Close	Data source settings
Options and settings >	

Figure 23 – Query Options

Select Privacy. Click Ignore the Privacy levels and potentially improve performance and click OK.

Select Close & Load.

After completing Option 1 or Option 2, within your worksheet, select the CustomerName dropdown and choose another customer.

Select DATA/Refresh All/Refresh All.




Figure 24 – Refresh All

In Figures **25** and **26** you can see the data within the Cases table change based upon the Customer Name selected.

Select CustomerName	DA_Cust1							
	CustomerID	-	CustomerID 🔽 Case	ID 💌	CaseName 🛛	Status	CreatedDate	ModifiedDate 💌
		2	2	5	Employee Discrimination	Open	12/10/2015 21:32	1/19/2016 19:28
			2	e	Fraud Investigation	Open	12/10/2015 21:33	1/19/2016 19:28
			2	7	HR Issue	Open	12/10/2015 21:34	1/19/2016 19:28
			2	8	SEC Audit	Open	12/10/2015 21:34	1/19/2016 19:28

Figure 25 – Select Customer Name

Select CustomerName	DA_Cust2						
	CustomerID	-	CustomerID 🔽 CaseID 🔽	CaseName 🗾	Status 💌	CreatedDate 💌	ModifiedDate 💌
		4	4 5	SEC Investigation	Open	1/18/2016 19:46	1/19/2016 19:44
			4 6	Employee Harrassment	Open	1/19/2016 4:02	1/19/2016 19:44
			4 7	Personal Injury Claim	Open	1/19/2016 4:03	1/19/2016 19:44

Figure 26 – Select Customer Name



About Veritas

Veritas Technologies LLC enables organizations to harness the power of their information, with solutions designed to serve the world's largest and most complex heterogeneous environments. Veritas works with 86 percent of Fortune 500 companies today, improving data availability and revealing insights to drive competitive advantage. More information is available at www.veritas.com.

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