

# Enterprise Vault Whitepaper

## Enterprise Vault Discovery Accelerator Effective Reviewing

This whitepaper is intended for Attorneys, Paralegals, and other eDiscovery professionals who use Enterprise Vault's Discovery Accelerator to review archived content.

This document focuses specifically on the review process. It shows Discovery Accelerator's Reviewer Interface as well as how the Analytics provides a greater set of review filters.

This document applies to the following version(s) of Enterprise Vault Discovery Accelerator 10.x, 11.x, 12.x.

If you have any feedback or questions about this document please email them to [IL-TEC@veritas.com](mailto:IL-TEC@veritas.com) stating the document title.

# Document Control

## Contributors

Who	Contribution
Logan Sutterfield/Walt Wintermute	Initial Document Creation
Liam Finn	Update of contents to include Discovery Accelerator 10.x
Phillip Owen	Change default Mark from Privilege to Query

## Revision History

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2.0	April 2016	Updates for version 12

## Related Documents

Document Title	Version / Date
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## Introduction

This guide is to assist Enterprise Vault Discovery Accelerator reviewers with some guidance on how to perform effective reviewing and explain the features and tools available to the reviewer to enable them to be more effective and hopefully streamline the time needed and make full use of the features offered in Discovery Accelerator. Let's first provide an introduction on some of the basic options used in reviewing discovered data.

In this document it is assumed that Analytics is enabled for the case as this provides additional review features which enhance the reviewer's ability to complete their task more efficiently. It is also assumed that the person having access only has the access to Review, Search and Export Role and none of the administrative access rights

## Marks

Discovery Accelerator provides the ability for reviewers to assign marks to discovered items. A mark allows the reviewer to indicate whether the item is relevant or not to the case. There are four default marks which are listed below but additional marks can be created as needed:

Marks	Status
Relevant	Reviewed
Not Relevant	Reviewed
Query	Question
Unreviewed	No Mark

**Table 1**

Each mark has a status associated with it (Pending, Questioned, or Reviewed). When items are exported, you can filter items by their marks or by their status. Listed below are the three status options you can associate with a mark.

Status
Pending
Reviewed
Questioned

**Table 2**

## Review

After a Case Manager completes searching and results are accepted, a user assigned Reviewer permission can then review, mark, tag, and comment on the items. Reviewers can access the items for review by selecting the review tab from the top menu bar in the Discovery Accelerator application

### Review Pane

The review pane is divided into five sections and allows users to quickly review and narrow down their search results by Marking items in the review set as relevant or not, adding tags and inserting comments.

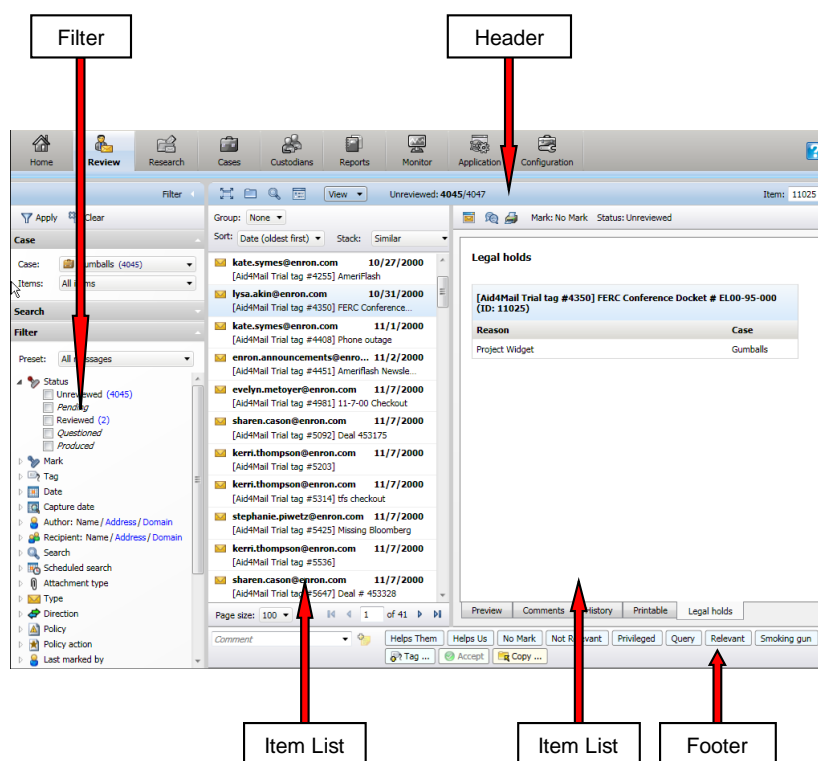


Figure 1

### Header

The header area allows users to customize their view by setting preferences, increase the review pane's size, copy content into Research Folders, and group and sort data. A Research folder is a folder a reviewer can use to work privately on items of interest. Research Folders provide almost the same functionality as cases, but unlike cases, research folders cannot place items on legal hold.



Expands the reviewing screen to fill the window, hiding the top button bar.



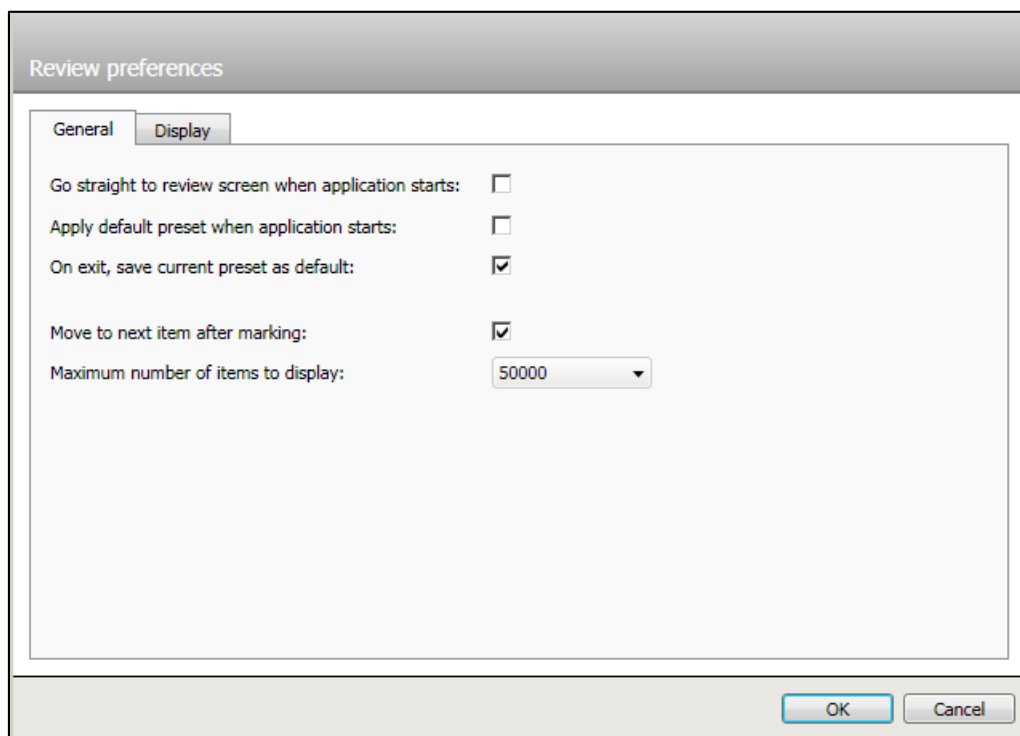
Allows you to view items copied to a research folder.



Allows you to create a search based upon the item you have currently selected.



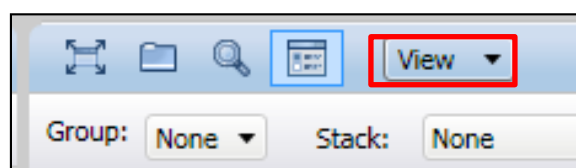
Allows you to set your review pane preferences. Preference Settings includes a General and a Display tab.



**Figure 2**

The options on the General and Display tabs allow a reviewer the choice of going directly to the review pane when Discovery Accelerator starts. It also allows the reviewer to choose whether to apply current filter settings as their default filter options upon exiting the application, and whether to apply default filter options upon startup. You can also choose to have the application automatically move to the next item in the review list, after a mark is applied on an item, and set a maximum number of items to display.

The View Dropdown menu provides you with additional screen layout options



**Figure 3**

- Reading pane layout Gives you the options on where you would like to show the reading pane including the option to Detach it which is helpful if you have the option of dual screens
- Size of reading pane text provides four size options for the text size in the reading pane only
- Reset layout to defaults undo any viewing preferences you have changed

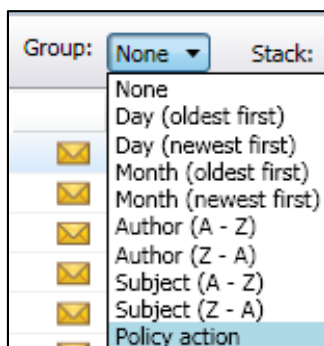
**Unreviewed** Shows the total number of items unreviewed/Total number of items selected

**Item** Shows the Discovery Accelerator Item ID of the item you are reviewing. If you know the Item ID of the item, you can type it in to move to the item.

**Group** Allows you to group items by date, author, subject or policy action. Grouping is different from sorting because you can sort dates by day and month.



**Figure 4**




**Figure 5**

## Sort

If you have chosen not to group items, you can sort them by date, author, subject by clicking on the headings in the review pane.

Select heading to sort



	Author	Subject / Filename	Date	Status	Type
	Mike Smith	Please review this...	5/2/2006 1:29...	Unreviewed	Exchange
	Anthony H...	Operational Risk offsite agenda	5/2/2006 5:01...	Unreviewed	Exchange
	Anthony.H...	Operational Risk offsite agenda	5/2/2006 5:01...	Unreviewed	Exchange
	Anthony H...	Operational Risk offsite agenda	5/2/2006 5:09...	Unreviewed	Exchange
	Anthony H...	Reply	5/2/2006 5:09...	Unreviewed	Exchange

Figure 6

## Stacking

This feature introduced with Enterprise Vault Discovery Accelerator 9.0 and above that allows you to find similar or duplicate items. This can significantly reduce review time and avoid reviewers having to review the same item multiple times. When Analytics is not enabled, emails in a case can be grouped together if they are 'similar'. This is calculated on metadata available from Enterprise Vault, including to, from, subject and modified date. If Analytics is enabled within a case, then emails can be grouped together if they are 'duplicates'. This is an exact content match calculated on the same metadata as 'similar' grouping, and the full content. Reviewers can bulk mark these items, reducing review times, and reducing the size of exports, so that only a single copy is exported out. Discovery Accelerator also reports on items that have not been exported or produced due to duplicate item detection.

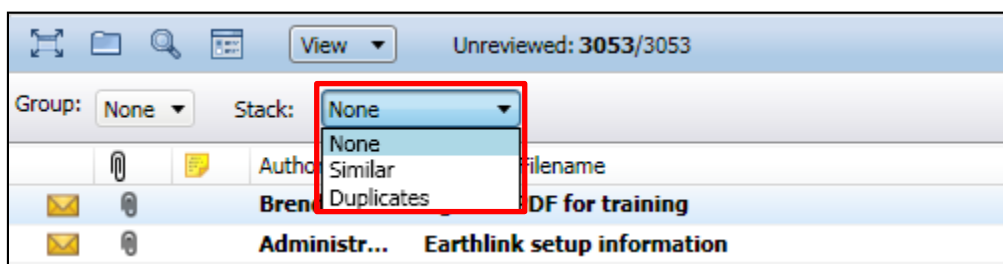


Figure 7

Selecting Similar, the icon beside the item changes, to indicate similar items are grouped together. Clicking on the down arrows allow you to view all similar items in the list grouped together.

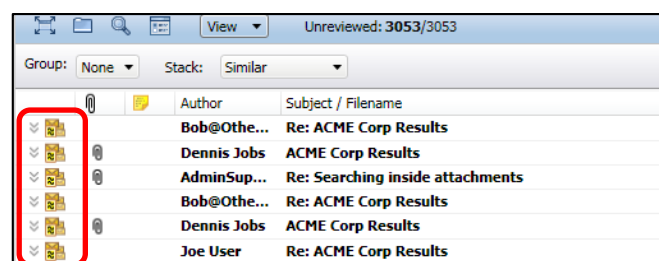


Figure 8



You can right-click on the icon and bulk mark, bulk tag, and comment on all similar items in one operation, thus reducing the length of time it takes to perform a review.

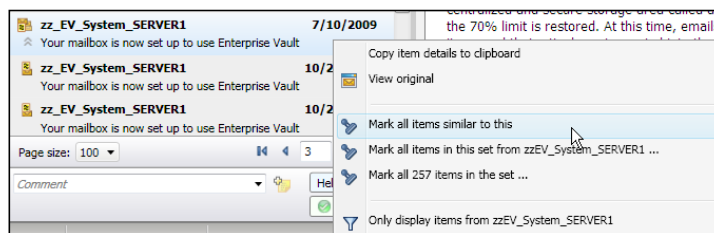


Figure 9

The icon representing duplicate items is slightly different, with a green circle. The duplicates option is only available if analytics is enabled for the case.

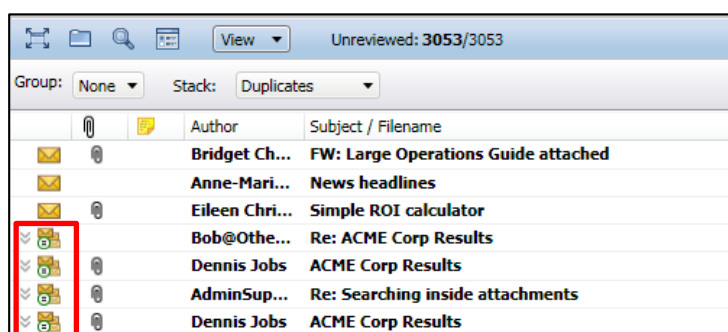


Figure 10

Right-click on the duplicate item if you wish to bulk mark, tag, or make comments on all of the duplicates grouped together in one step.

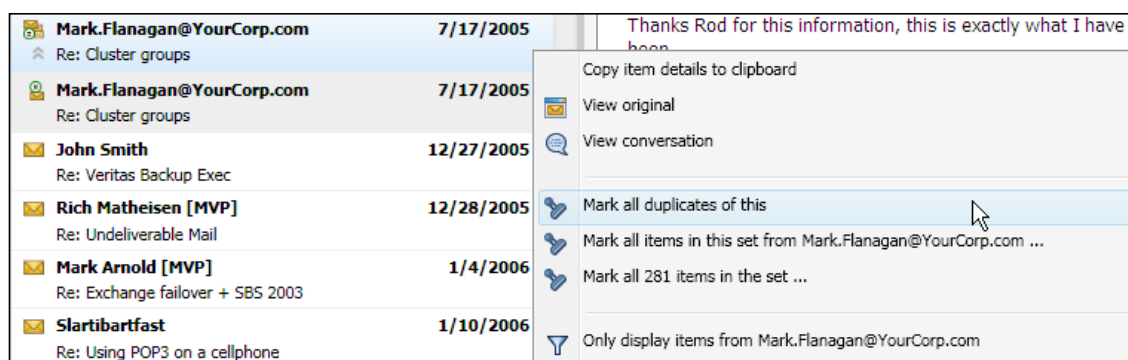


Figure 11

## Footer

The footer section of the Discovery Accelerator review screen allows users to page forwards and backwards through items being reviewed, add comments, add marks and tags to items, and copy items to a research folder. A research folder allows reviewers a private area to work on items. The accept icon allows a reviewer to accept marks and tags automatically applied by a rule.



Figure 12

**Comment :** Reviewers can type in their comments about the item in the footer and then click the icon with the plus sign to associate the comments with the item.

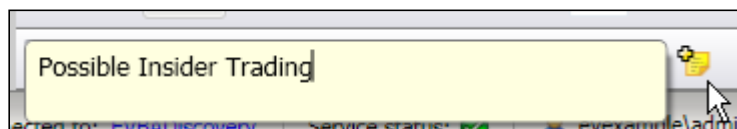



Figure 13

An item containing a reviewer's comment will then include a folded paper icon beside it in the item list , to show the item reviewed includes a comment.

## Marks

Marks are applied to individual items by reviewers by highlighting the item in question in the items list and then selecting the appropriate Mark in the footer. Please note that only one Mark can be applied to an item.

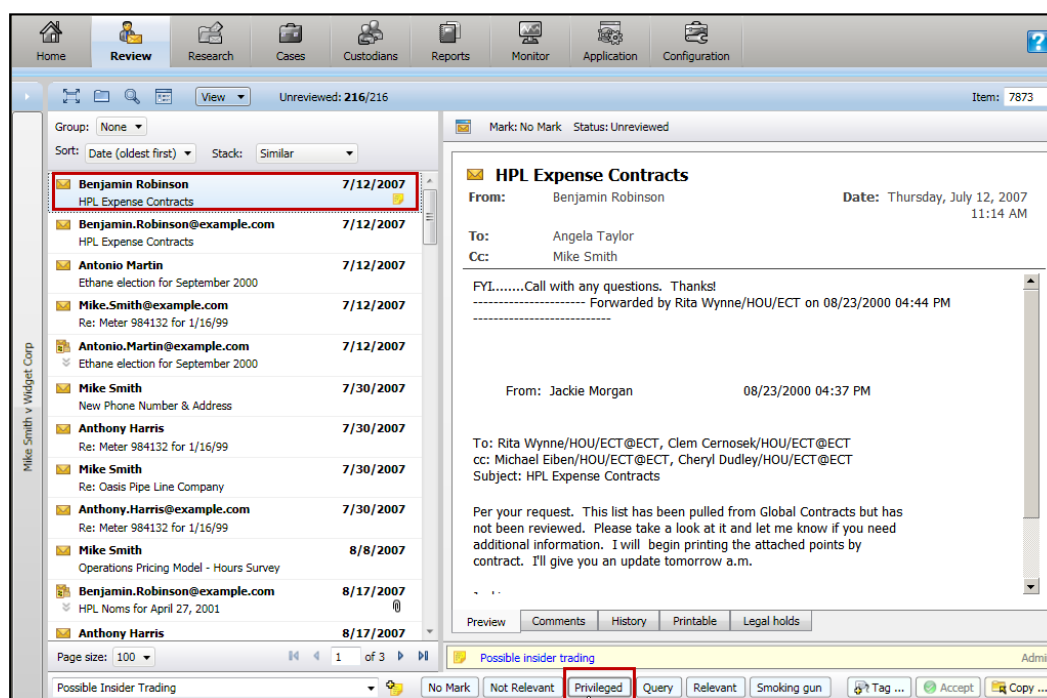


Figure 14

## Tags

Reviewers can also apply tags to items under review. Unlike a Mark, a reviewer can associate multiple tags to an item. A tag also does not have an associated status, so tagging an item would not change an item's status, for example, to reviewed. Tags can also be categorized into tag groups. Tag groups can be useful to set up if you have many tags and need a way to logically group them together. There are two types of tag groups, single-choice and multiple-choice tag groups. In a single-choice tag group, only one tag in the group can be selected. With a multiple-choice tag group, some or all of the tags in the group can be selected.

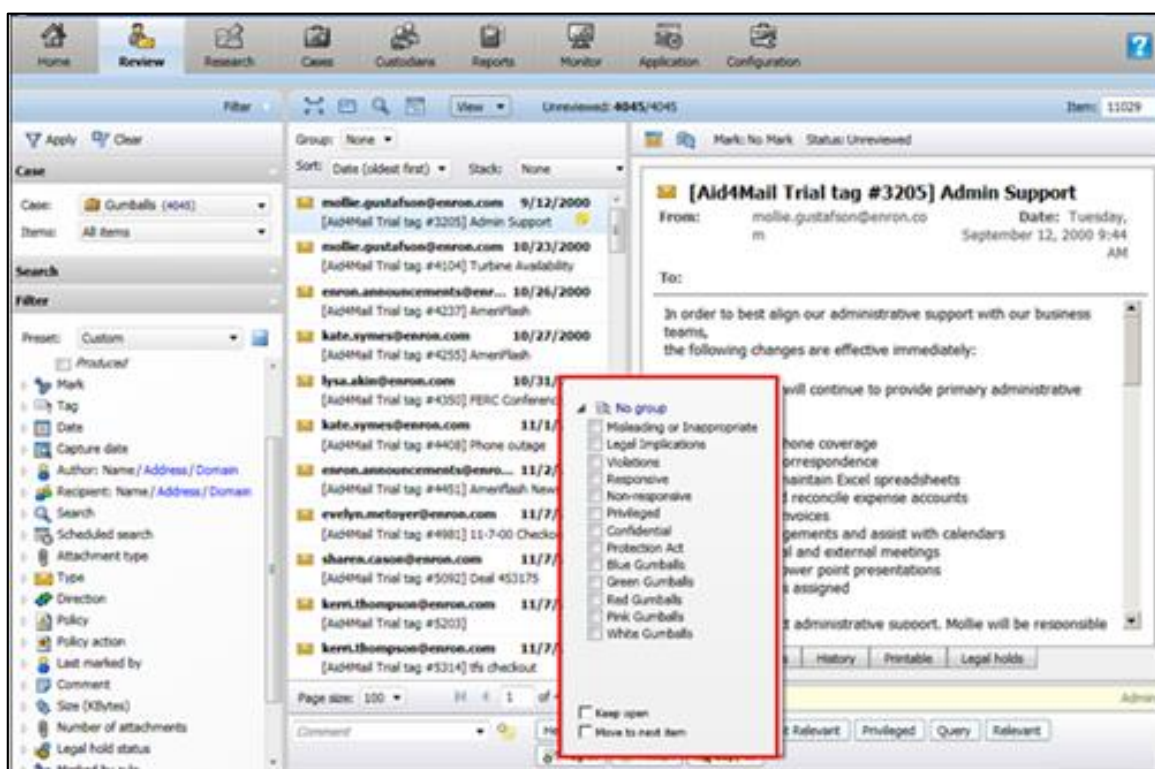


Figure 15

## Reading Pane

The reading pane allows you to read the item being reviewed. The Reading pane contains the following tabs at the bottom of the screen.

- Preview – displays an HTML representation of the item.
- Comments – shows reviewer comments about the item.
- History – Displays the item's audit history, including what mark, tags and comments were applied to the item, when they were applied, and what reviewer performed these actions.
- Printable – Displays a printable version of the item.
- Legal Holds – Shows any legal holds placed on the item.

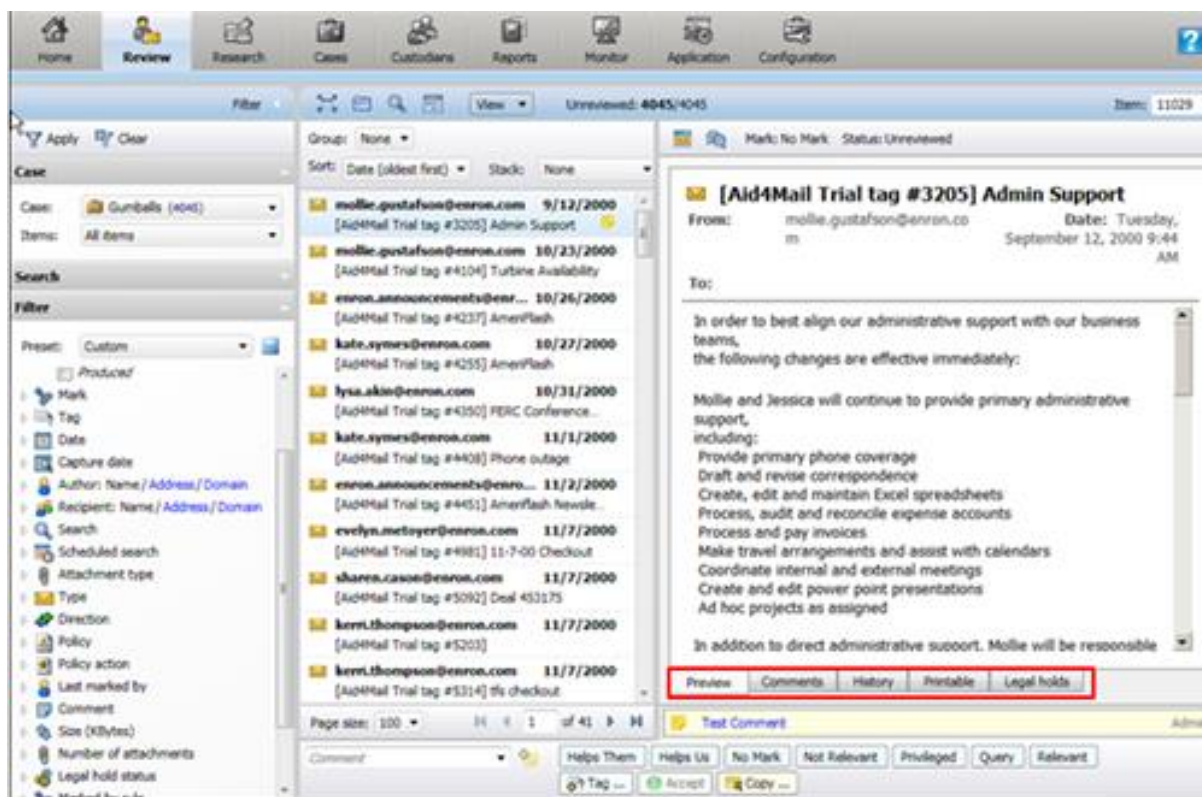


Figure 16

## Filter

The Filter Pane allows reviewers to filter based on criteria such as date, author and recipient. Filtering will be described in more detail within the Basic Reviewing section of this document.

## Item List

The item list shows items currently under review, based upon the filter applied. Unreviewed items are listed in bold. Right-clicking on an item in the item list provides several options, including:

Copy item details to clipboard – copies relevant details of the item, such as who the item is from, subject, author, date, etc.

View Original – allows the reviewer to view an item in its original format (e.g. Word, PDF, Outlook, Lotus Notes.) Otherwise, reviewers will see an HTML representation of the item in the reading pane.

- View Conversation – allows a reviewer to view the item's entire conversational thread. This feature is only available when Analytics is enabled for a case.
- The additional options allow bulk marking of items by author, bulking marking all items in the review set, and displaying items by author.

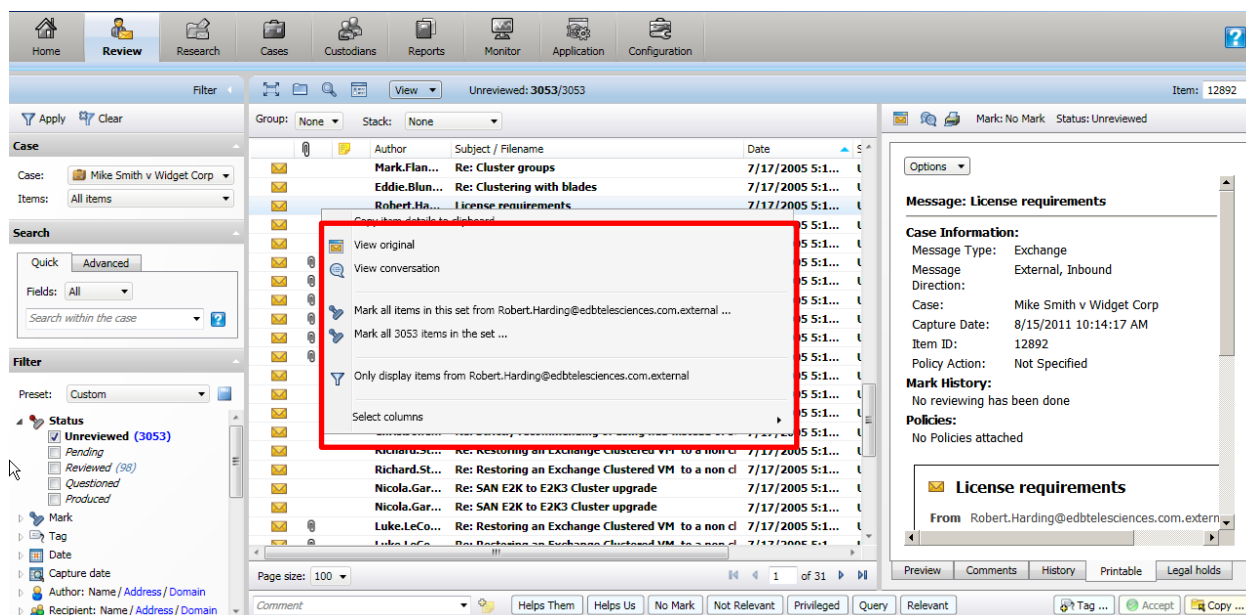
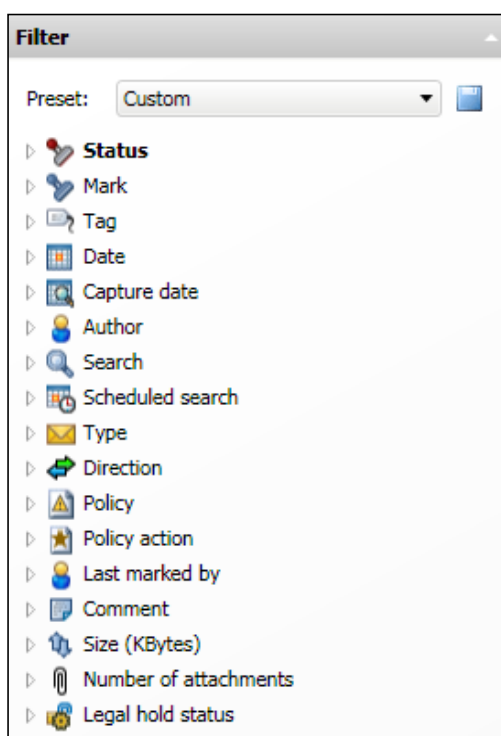


Figure 17

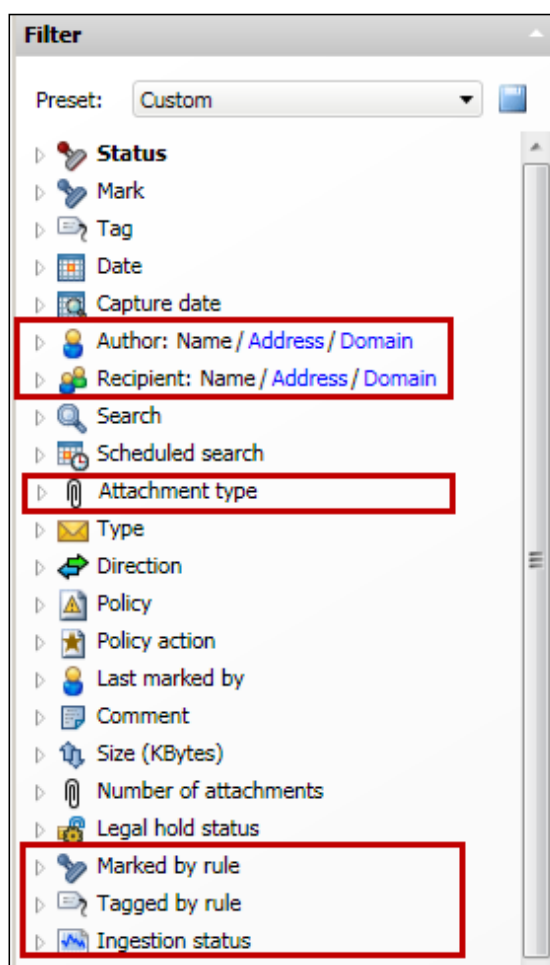
## Basic Reviewing

### Filter

Facets within the Review screen offer a reviewer the ability to quickly narrow down a large number of items in a review set into a smaller, more relevant subset. A facet is simply a classification. For example, Author, Recipient, Capture Date, etc., are all examples of facets. Just as Search within a Case is only available when analytics is enabled, certain facets are only available with analytics. The illustration below shows facets with analytics disabled and enabled. The objects inside the red borders are only enabled with analytics. Note that while the Author facet is listed, whether the case is enabled for analytics or not, it is extended to support author address and domain with analytics.


















Case Without Analytics










Case With Analytics



Listed below is a description of each filter and its function:

▷  <b>Status</b>	Filters items based on their status. (e.g. Unreviewed, Reviewed, Pending,)
▷  <b>Mark</b>	Filters items based on their marks. (e.g. Relevant, Not Relevant).
▷  <b>Tag</b>	Filters items based on tags.
▷  <b>Date</b>	Filters items based on date (e.g. Today, Yesterday, by Year, etc.) or by specific date range.
▷  <b>Capture date</b>	Filters items based upon their capture date.
▷  <b>Author</b>	Selects items based upon the sender. **
▷  <b>Recipient</b>	Selects items based upon the recipient. * **
▷  <b>Search</b>	Selects items based upon searches that have run.
▷  <b>Scheduled search</b>	Selects items based upon scheduled searches.
▷  <b>Attachment type</b>	Selects items by file type. *
▷  <b>Type</b>	Selects items by type. (e.g. Exchange, Domino, File System, Instant Messaging, etc.)
▷  <b>Direction</b>	Selects items based upon the direction it has traveled. (e.g. Internal, External Inbound, External Outbound.)
▷  <b>Policy</b>	Selects items based upon the policy which the Enterprise Vault Automatic Classification Engine has tagged them.
▷  <b>Policy action</b>	Selects items based upon the policy action which the Enterprise Vault Automatic Classification Engine has tagged them with. (e.g. to Include or Exclude items for review.)
▷  <b>Last marked by</b>	Selects by the last reviewer who reviewed the item(s).

- ▷  **Comment** Selects items by comments.
- ▷  **Size (KBytes)** Orders items based upon kb size. (e.g. 0-9, +1000, etc.)
- ▷  **Number of attachments** Selects items based upon the number of attachments.
- ▷  **Legal hold status** Selects items based upon their legal hold status. (e.g. Not on Hold, On Hold, Hold to be Added, etc.)
- ▷  **Marked by rule** Selects items based upon the rule you have created to automatically mark them \*
- ▷  **Tagged by rule** Selects items based on the rule you created to automatically tag them. \*
- ▷  **Ingestion status** Selects items based upon their ingestion into the Enterprise Vault Discovery Accelerator Customer Database. (e.g. Processed Successfully, Processing, Not Processed Yet, \*

\* An asterisk beside an item indicates that this filter is only available when analytics is enabled.

\*\* A double asterisk indicates that you can select users by e-mail addresses or domains.

### Using Facets and Search within a Case together

You can use the Quick or Advanced search in conjunction with facets to quickly narrow your results even further. For example, you can perform a quick search against "Mortgage Backed Securities" and then expand the author facet to see the top ten authors that returned hits for that quick search result.

Likewise, you can do the reverse, selecting, for example, the unreviewed items facet, and then using the Quick Search to search just the unreviewed items that contain the phrase, "Mortgage Backed Securities".

### Top Ten

When expanded, some filters display the top ten hits. For example, expanding Author shows the ten Authors with the most hits. (Number of hits returned is displayed in parentheses after the author's name.) However, clicking the **more...** link will allow you to find additional authors.

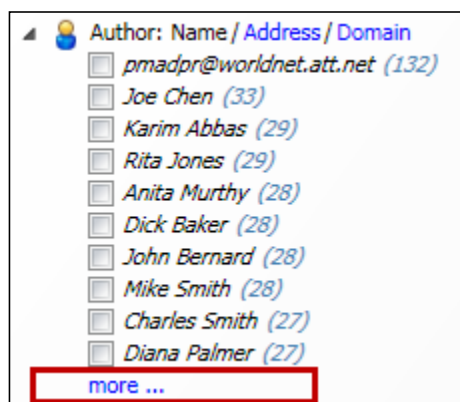


Figure 18



## Dynamic Filtering

Counts and values are dynamically updated as the filter changes. For example, the number of hits returned for each author would dynamically change if at first we showed all items in the case, and later, adjusted the filter to display only unreviewed items.

## Bulk Marking

Right-clicking on a particular facet allows a reviewer to quickly bulk mark all items related to that facet (e.g. Relevant, Not Relevant, etc.).

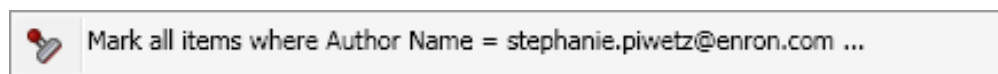


Figure 19

Selecting to Mark all items brings up the screen below, where the reviewer can select which mark to apply. Optionally, a reviewer can apply the same tag(s) and comments to all the selected items as well.

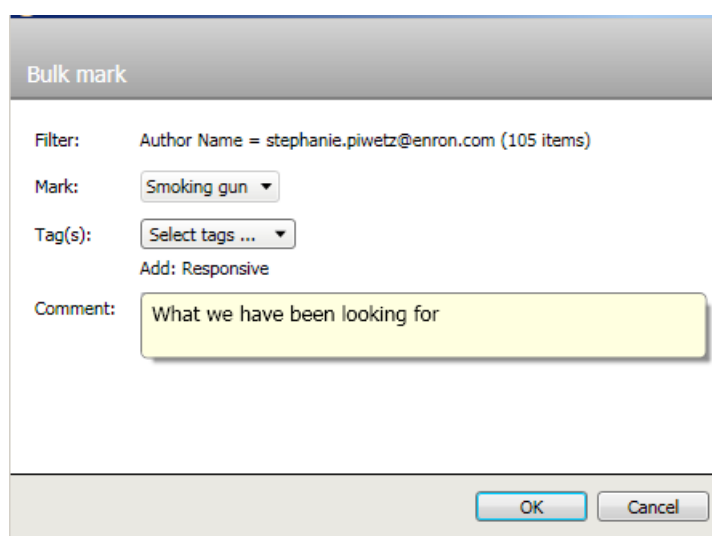


Figure 20

## Using Facets and Bulk Marking within a case together

Bulk marking in conjunction with the Filter option allows you to quickly filter all non-related material and mark them as "Not Relevant" so you can exclude them from the beginning and spend the necessary time on the items that only apply to the case for example newsletters, notifications from social media sites, and other automated notifications.

## Conversation View

Right-clicking on a message and selecting View conversation allows you to view an entire conversational thread associated with the selected message. Please note that this feature is only enabled with analytics.

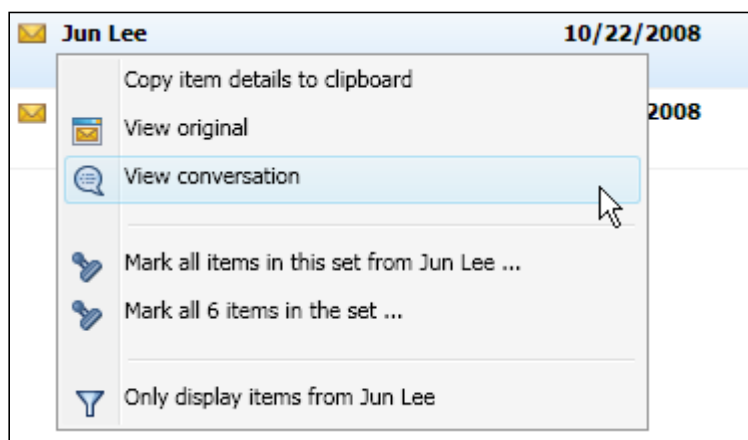


Figure 21

This allows a reviewer to see the entire conversation, and bulk mark, tag, and comment upon all items in the thread the same way. This is beneficial because all aspects of a conversation must be provided in context and it saves time marking each message in the thread.

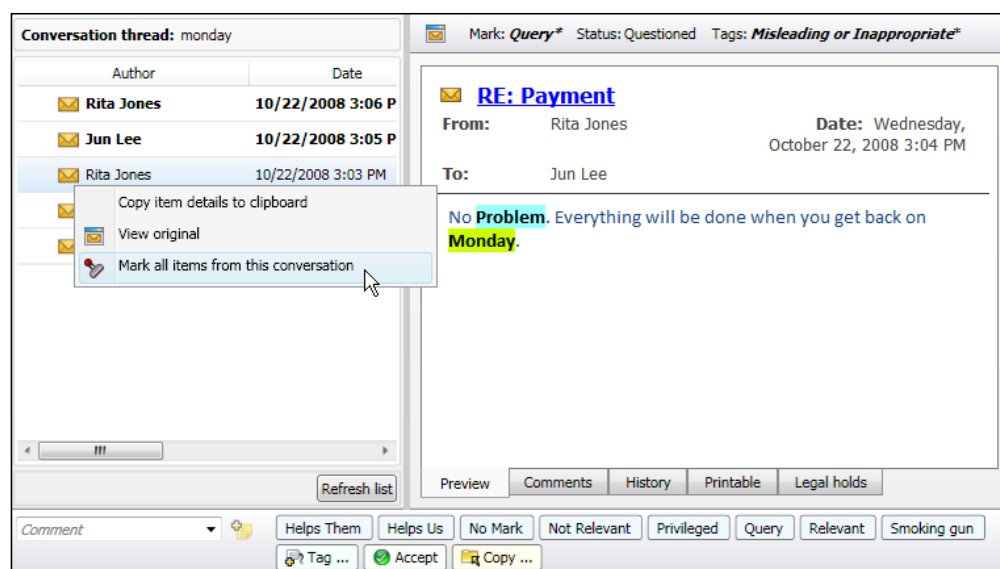


Figure 22

Please note that the Conversation window may not show all the items in a conversation until the retrieval of analytics data is complete for the Case or Research Folder. Conversation analysis is based primarily on the subject of the mail items, but also includes other mail attributes that define a conversation. For the purpose of conversation analysis, mail subjects are normalized to remove prefixes that are added by email clients. For example, RE:, Re:, Fwd:, and Antwort: are removed. After normalization, messages must have **identical subjects** to be considered part of the same conversation if the subjects are different they messages will be treated as separate conversations

For any messages generated by Outlook 2003 or later, conversation analysis can also construct a conversation hierarchy. Items from Outlook clients earlier than Outlook 2003 are simply grouped in a flat list. Conversation analysis may find many conversations with a frequently used email subject such as "Hello". In this case, the Conversation window shows all the results, from multiple conversations, each with its own top level item in the hierarchy. The conversation can display up to 1,000 top level items in the hierarchy.

## Result Filtering

Select the arrow beside Case to choose the case to work on. Select the arrow beside Items to show what you would like to review. Options include:

- Temporary assignment (a select number of items to work on during a session). With this option, a reviewer grabs a small number of items (e.g. 100). The items are locked until the reviewer finishes working with them. Other reviewers using temporary assignment will not see them.
- All items (all items, including those assigned to others). In this mode the reviewer can see every item in the case, regardless of whether other reviewers have been assigned items. This is useful if there is just one reviewer for a case, or when a supervisor simply wants to view all items.
- My items (items that have been assigned to you by a case administrator). This option is useful when there are multiple reviewers in a case and an administrator wants to assign each reviewer a subset of items.

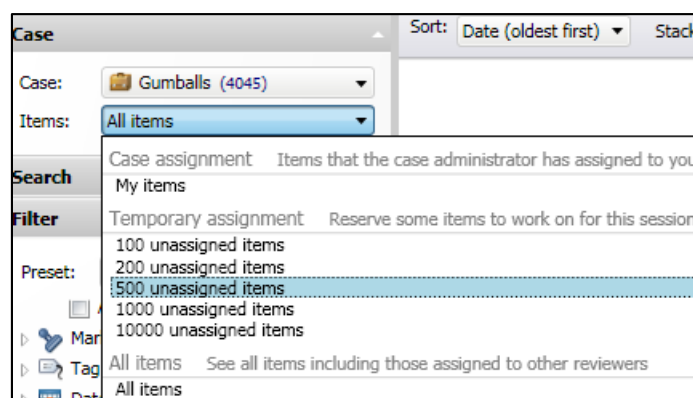


Figure 23

This is beneficial as it provides you the ability to work with the results in more manageable pieces instead of trying to work on all the data at once.

## Search within the Case

Search within the Case is available when a case is enabled for Analytics. The two search options are Quick and Advanced.

### Quick Search

Select the arrow beside Fields to show which search options are available, when performing a quick search. Optionally, within the search field itself, you can manually type in multiple fields to search against, including: from, to, subject, content, subjcont, fromto, all.

For example: from:mike AND subject: "Mortgage Backed Securities"

If the reviewer specifies no field in the search box itself, then the Fields drop-down specifies the columns to search.

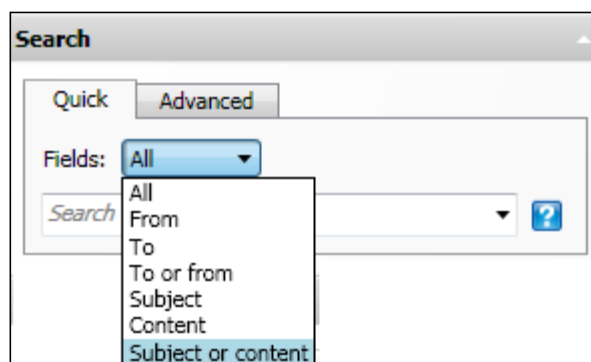


Figure 24

Within the search field, boolean operators such as AND, OR, AND NOT, and NEAR can be used between words and phrases. If full indexing is used by Enterprise Vault, then phrase-level searching is possible. If a reviewer wants to search against a specific phrase, they can include the phrase within quotation marks. Although a quick search does not allow you to save and reuse searches like the Advanced Search discussed later, the quick search tab does maintain a per user history of the 20 most recent searches.

Listed below are examples of search criteria that quick search can use:

Search Criteria	Result
"Mortgage Backed Securities"	Would return a search result with any documents that included the phrase, "Mortgage Backed Securities" *
Mortgage Backed Securities	Entering the same search without quotes, would return any documents with the word(s) Mortgage or Backed or Securities.
"Mortgage Backed" OR Securities	Would return a search result with any documents that included the phrase, "Mortgage Backed" or any documents with the word Securities.
"Mortgage Backed" NEAR Securities	Would return a search result with any documents that included the phrase, "Mortgage Backed" and the word Securities, found within 50 words of each other.
"Mortgage Backed Securities" AND Fraud	Would return a search result with any documents including the phrase Mortgage Backed Securities and the word Fraud.
Mike AND NOT "Mike Smith"	Would return a search result for Mike, but not Mike Smith
from:mike AND (subject: "Mortgage Backed Securities" or subject: "Foreclosure")	Would return a search result for the author, Mike, where the subject of the message was either Mortgage Backed Securities or Foreclosure.

Table 3

\*This would depend on whether full text indexing is enabled for Enterprise Vault. The product offers two indexing levels, full and brief. Full text indexing allows for phrase-level searching, brief level indexing does not. Listed below is a table that describes in more detail each indexing level's capability.

Indexing Level	Capability
Brief	Allows searching of the metadata associated with the Author, Recipients, Subject and Date Range.

Full	Allows searching of the metadata associated with the Author, Recipients, Subject, Date Range as well as key word and phrase searching of the content contained in the message body, attachments, and documents.
------	---

Table 4

Advanced Search

The Advanced search dialong box allows you to type in a name and description of your search. As you can see, the fields and attributes you can search on within Advanced Search are much more extensive than the quick search. You can also turn on or off stemming. Stemming lets you match words that derive from the same root, for example, walk, walked and walking. Another advantage of the Advanced Search is it allows you to save and reuse the searches you create. Depending upon the attribute you select, a variety of different boolean search criteria and symbols can be used. Accepted operators (depending on the attribute selected) would include: CONTAINS, ANYOF, ALLOF, NOT CONTAINS, NOT ANYOF,NOT ALLOF, NEAR, NOT=, BETWEEN, NOT BETWEEN,=, >. >=, <. <=.

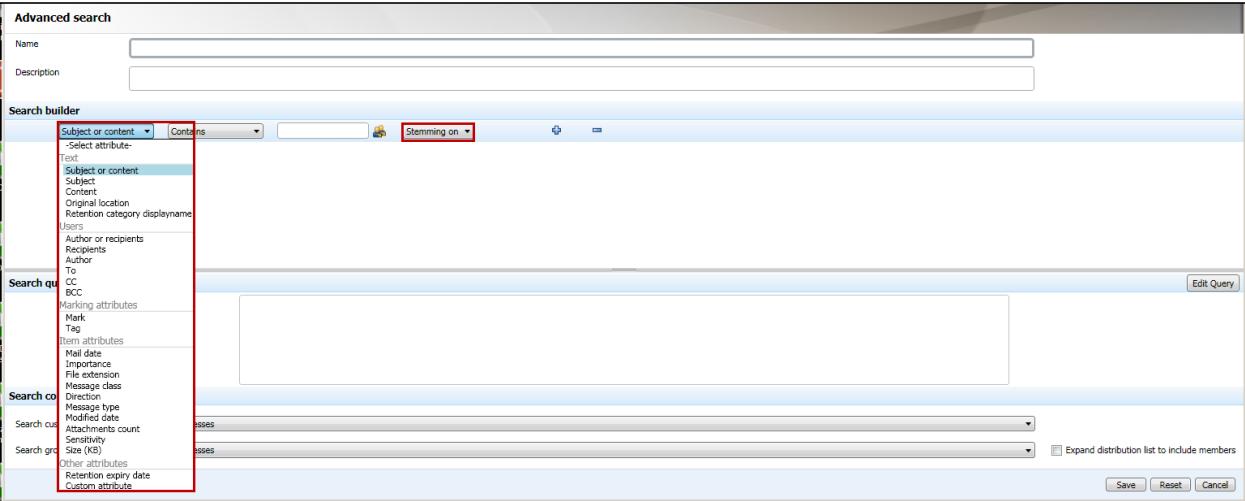


Figure 25

Please note that you can not use wildcards with stemming

Advanced Search Page Layout

In this section, we will discuss the layout of the search page and the options for configuring searches.

Name

Provide a name and description of the search. The description is useful when reusing the search at a later date.

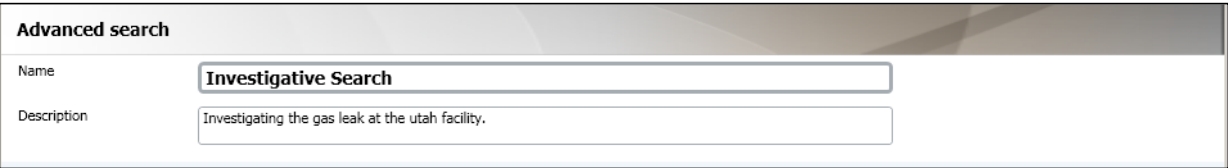


Figure 26

## Search Builder

This area is used to define one or more conditions that an item must meet. To define a condition, begin with the “Select Attribute” drop-down menu. Choose an attribute of the items for which to search.

In the Search builder area, define one or more conditions that an item must meet. To define the conditions, proceed as follows:

- In the Select attribute dropdown list, choose an attribute of the items for which to search. For example, choose Subject if you want to search the subject lines of items.
- In the next dropdown- list, choose an operator to apply to the selected attribute. For example, if you have set the attribute to Subject, you can choose the Contains operator to search for items whose subject lines contain certain words.
- Set the required value for the attribute. For example, when the attribute is Subject and the operator is Contains, you can type “Veritas” to search for the items whose subject lines contain this word.

Note the following:

- The search string cannot contain any punctuation characters other than the underscore character.
- You can append an asterisk (\*) as a wildcard character to the end of the search string.
- Certain commonly occurring words such as "the" and "and" are not indexed, so Discovery Accelerator ignores these words when it encounters them in a search string.
- If you set the attribute to Subject, Content, or Subject or Content, then make a decision whether to turn search stemming on or off. Stemming lets you match words that derive from the word that you specify. For example, the word "run" matches "running" and "ran". You cannot use wildcard characters in conditions that use stemming.
- Click the plus (+) button to save the condition and add another one, if required. For example, you may need to search for items whose Author field contains a nominated author and whose Subject field contains a specified string.
- You define the relationship between two conditions with the And/Or buttons.
- If you want to remove a condition click the minus (-) button at the right of its row.

Search builder				
	Subject or content	Near	gas leak	+ -
And	Author or recipients	Any of	T:Adam Johnson,T:David Phillips	+ -
And	-Select attribute-			+ -

Figure 27

## Search Query

As you add conditions, they appear in the Search query area. The rules that you build in the “Search Builder” display in the analytics rule definition language (RDL) in the “Search query” area. When you become familiar with the query language, you can construct more complex queries by editing the syntax manually.

**Search query** Edit Query

SubjectOrContent NEAR 'gas leak'  
And  
AuthorOrRecipients ANYOF 'T:Adam Johnson  
T:David Phillips'

Figure 28

### Search Condition Settings

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

**Search condition settings**

Search custodians by: Email addresses

Search group distribution list by: Email addresses ☐ Expand distribution list to include members

Save Reset Cancel

Figure 29

The conditions that you enter use the Custodian information that is available at the time that you build the search. This information is not updated unless you edit the search again.

For example, when you create a search and select the option Expand distribution list to include members, the list members at that time are saved with the search. If the membership of the list changes later, these changes are not applied to the search until it is edited and saved again.

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

### Advanced Search Examples

In this section, examples will be provided for using the advanced analytic search to narrow down the existing results in a case.

#### Example: Advanced Analytic Search – NOT Contains

In this example, we will Target the existing results, but search for only those which do not contain the word “Paradise” or the word “Run” and any derivatives such as “Running”, “Ran”, etc. First name the search and provide a description so that if the search is reused at a later date, the user will understand the criteria.

**Advanced search**

Name: Search - NOT Contains

Description: This search will return only results that do not contain specified words

Figure 30

Next, select the attribute “Content”, the operator “NOT Contains”, enter the word “Run”, turn stemming “ON” from the drop-down menu, then click the plus (+) button to add the condition.

Search builder

	Content	Not contains	run	Stemming on

Buttons: + (circled in red), -

Figure 31

Then repeat the steps for the word “Paradise” but leave stemming in “OFF” position.

Search builder

	Content	Not contains	run	Stemming on
And	Subject	Not contains	paradise	Stemming off

Buttons: + (circled in red), -

Figure 32

The conditions should be displayed as follows.

Search builder

	Content	Not contains	run	Stemming on
And	Subject	Not contains	paradise	Stemming off
And	-Select attribute-			

Buttons: +, -

Figure 33

The search query window will now display the raw syntax of the conditions.

Search query

Content NOT STEM CONTAINS 'run'  
And  
Subject NOT CONTAINS 'paradise'

Buttons: Edit Query

Figure 34

This search does not include Targets or Custodians therefore the condition settings can remain at the default. Click “Save”.

Search condition settings

Search custodians by: Email addresses

Search group distribution list by: Email addresses

☐ Expand distribution list to include members

Buttons: Save (circled in red), Reset, Cancel

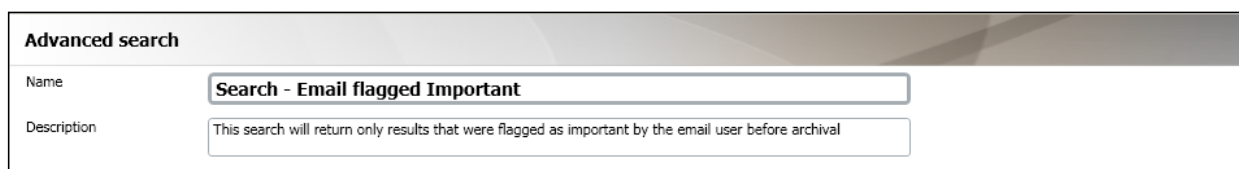
Figure 35

The results displayed in the review interface should be only those that do not contain the word “Paradise” or the word “Run” and the derivatives.

### Example: Advanced Analytic Search – Importance Flag

In this example, we will Target the existing results, but search for only those which were flagged by the client as “High Importance”. First name the search and provide a description so that if the search is reused at a later date, the user will understand the criteria.






**Advanced search**

Name: **Search - Email flagged Important**

Description: This search will return only results that were flagged as important by the email user before archival

Figure 36

Next, select the attribute “Importance”, the operator “Equal To”, and the value to “High” from the drop-down menu, then click the plus (+) button to add the condition.

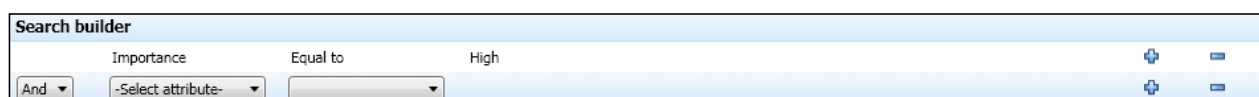


**Search builder**

Importance Equal to High

Figure 37

The condition should be displayed as follows.



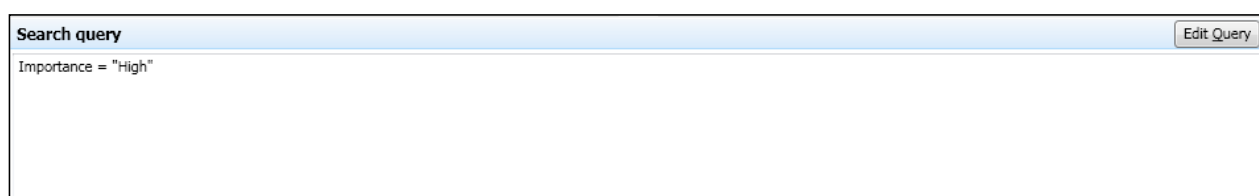
**Search builder**

Importance Equal to High

And -Select attribute-

Figure 38

The search query window will now display the raw syntax of the conditions.



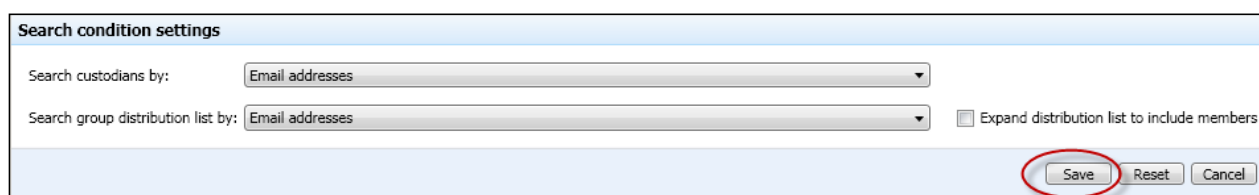
**Search query**

Importance = "High"

Edit Query

Figure 39

This search does not include Targets or Custodians therefore the condition settings can remain at the default. Click “Save”.



**Search condition settings**

Search custodians by: Email addresses

Search group distribution list by: Email addresses

☐ Expand distribution list to include members

Save Reset Cancel

Figure 40

The results displayed in the review interface should be only those that were flagged by the client as “High Importance”.

**Example: Advanced Analytic Search – Undisclosed Recipients (BCC)**

In this example, we will Target the existing results, but search for only those which were sent to the “APJ Legal” distribution list via BCC. First name the search and provide a description so that if the search is reused at a later date, the user will understand the criteria.

**Advanced search**

Name:

Description:

**Figure 41**

Next, select the attribute “BCC”, the operator “Any Of”, then click the selection button adjacent to the value field.

**Search builder**

BCC Any of

**Figure 42**

Once the Target and Custodian selection dialogue appears, select “Custodian Groups” from the contents drop-down menu. Next scroll down and select the “DL\_APJ\_Legal” Custodian Group and click “Save”.

**Contents** Custodian Groups

Selected	Type	Target name
<input checked="" type="checkbox"/>	DL	DL_APJ_Legal
<input type="checkbox"/>	DL	DL_EMEA_Finance
<input type="checkbox"/>	DL	DL_EMEA_Legal
<input type="checkbox"/>	DL	DL_EMEA_Marketing
<input type="checkbox"/>	DL	DL_EMEA_Sales
<input type="checkbox"/>	DL	DL_EMEA_VIP
<input type="checkbox"/>	SEC	SEC_EMEA_Finance
<input type="checkbox"/>	SEC	SEC_EMEA_Legal
<input type="checkbox"/>	SEC	SEC_EMEA_Marketing
<input type="checkbox"/>	SEC	SEC_EMEA_Sales
<input type="checkbox"/>	SEC	SEC_EMEA_VIP
<input type="checkbox"/>	DL	DL_AMER_Finance

Selected items:

Selected	Type	Target name
<input checked="" type="checkbox"/>	DL	DL_APJ_Legal

Save Cancel

**Figure 43**

The condition should be displayed as follows.

Figure 44

The search query window will now display the raw syntax of the conditions.

Figure 45

This example does include the use of Custodian Groups, so we will modify the condition settings. From the “Search Custodian by” drop-down menu, select “E-mail addresses and Display names” and from the “Search GroupDistribution list by” drop-down menu, select “E-mail addresses and Display names”. Then select the option to “Expand distribution lists to include members”.

Figure 46

The results displayed in the review interface should be only those that were sent to the APJ Legal distribution list via BCC.

### Searchable Attributes

The table below shows a list of Searchable Attributes:

Attribute	Data Type	Possible Operators	Description
AttachmentsCount	Numeric	= > >= < <=	Use AttachmentCounts to add a condition that is based on the number of E-mail attachments
Author	String	CONTAINS ANYOF NOT CONTAINS NOT ANYOF	Use Author to add a condition that is based on the E-mail's sender.  Values that correspond to Targets (T:), Target Groups (TG:), Custodians (C:), and Custodian Groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.

AuthorORRecipients	String	CONTAINS ANYOF NOT CONTAINS NOT ANYOF	<p>AuthorORRecipients is a composite attribute that allows you to add a condition that is based on senders and recipients in any of the following attributes:</p> <ul style="list-style-type: none"> <li>• From</li> <li>• To</li> <li>• CC</li> <li>• BCC</li> </ul> <p>Values that correspond to Targets (T:), Target Groups (TG:), Custodians (C:), and Custodian Groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case</p>
BCC	String	CONTAINS ANYOF ALLOF NOT CONTAINS NOTALLOF NOT ANYOF	<p>Use BCC to add a condition that is based on the E-mail's BCC recipients.</p> <p>Values that correspond to Targets (T:), Target Groups (TG:), Custodians (C:), and</p> <p>Custodian Groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.</p>
CC	String	CONTAINS ANYOF ALLOF NOT CONTAINS NOTALLOF NOT ANYOF	<p>Use CC to add a condition that is based on the E-mail's CC recipients.</p> <p>Values that correspond to Targets (T:), Target Groups (TG:), Custodians (C:), and</p> <p>Custodian Groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.</p>
Content	String	CONTAINS ANYOF ALLOF NEAR NOT CONTAINS NOTALLOF NOT ANYOF NOT NEAR	<p>Use Content to add a condition that is based on a string in the body of the E-mail, or in the content of a file.</p> <p>Values that correspond to Targets (T:), Target Groups (TG:), Custodians (C:), and Custodian Groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.</p>

Custom	String	= NOT = CONTAINS ANYOF ALLOF NOT CONTAINS NOTALLOF NOT ANYOF	Use Custom to add a condition that is based on any custom attributes created during archiving. Enter the name of the custom attribute before you select an operator and enter the search string.  For example: Custom .MyAttribute CONTAINS "Veritas"  Values that correspond to Targets (T:), Target Groups (TG:), Custodians (C:), and Custodian Groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.
Direction	List	= ANYOF NOT = NOT ANYOF	Use Direction to add a condition that is based on the direction of the E-mail.  Acceptable values are: <ul style="list-style-type: none"> <li>• Internal</li> <li>• External Inbound</li> <li>• External Outbound</li> <li>• Not Specified</li> </ul>
FileExtension	String	ANYOF CONTAINS NOT ANYOF NOT CONTAINS	Use FileExtension to add a condition that is based on E-mail extension type and file types. Enter multiple file types as a list.  For example: DOC PDF MSG
Importance	List	= ANYOF NOT = NOT ANYOF	Use Importance to add a condition that is based on the E-mail's importance setting.  Acceptable values are: <ul style="list-style-type: none"> <li>• Low</li> <li>• Normal</li> <li>• High</li> </ul>
MailDate	Date	= > >= < <= BETWEEN NOT BETWEEN	Use MailDate to add a condition that is based on the date the E-mail was sent, and on the modified date of the E-mail's attachments.  When you use the BETWEEN and the NOT BETWEEN operators, you must specify a start and end date.

MessageClass	String	ANYOF CONTAINS NOT ANYOF NOT Contains	Use MessageClass to add a condition that is based on the E-mail's MAPI message class setting. For example: IPM.Note
MessageType	List	= ANYOF NOT = NOT ANYOF	Use MessageType to add a condition that is based on the E-mail's type. Acceptable values are: <ul style="list-style-type: none"> <li>• Exchange Mail</li> <li>• Domino Mail</li> <li>• SMPT Mail</li> <li>• File</li> <li>• Instant Messaging</li> <li>• Bloomberg</li> <li>• Fax</li> </ul>
ModifiedDate	Date	= > >= < <= BETWEEN NOT BETWEEN	Use the ModifiedDate to add a condition that is based on the date the E-mail or file was last modified.  When you use the BETWEEN and the NOT BETWEEN operators, you must specify a start and end date.
OriginalLocation	String	ANYOF CONTAINS NOT ANYOF NOT CONTAINS	Use the OriginalLocation to add a condition that is based on the original location of the E-mail or file. For example: <ul style="list-style-type: none"> <li>• Inbox</li> <li>• Sent Items</li> <li>• \\server\share\sales</li> </ul>

Recipients	String	CONTAINS ANYOF NOT CONTAINS NOT ANYOF	<p>Recipients is a composite attribute that allows you to add a condition that is based on recipients in any of the following attributes:</p> <ul style="list-style-type: none"> <li>• To</li> <li>• CC</li> <li>• BCC</li> </ul> <p>Values that correspond to Targets (T:), Target Groups (TG:), Custodians (C:), and Custodian Groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.</p>
RetentionCategory DisplayName	String	CONTAINS NOT CONTAINS	Use RetentionCategoryDisplayName to add a condition that is based on the retention category under which the item was archived. For example: General retention category
RetentionExpiryDate	Date	= > >= < <= BETWEEN NOT BETWEEN	<p>Use the RetentionExpiryDate to add a condition that is based on the date the Email or file is due to expire. The retention category under which the item was archived determines the expiry date.</p> <p>When you use the BETWEEN and the NOT BETWEEN operators, you must specify a start and end date.</p>
Sensitivity	List	= ANYOF NOT =	<p>Use Sensitivity to add a condition that is based on the sensitivity of the E-mail.</p> <p>Acceptable values are:</p> <ul style="list-style-type: none"> <li>• Normal</li> <li>• Personal</li> <li>• Private</li> <li>• Confidential</li> </ul>
Size	Numeric	= > >= < <=	Use Size to add a condition that is based on the size of the E-mail or file.

Subject	String	CONTAINS ANYOF ALLOF NEAR NOT CONTAINS NOTALLOF NOT ANYOF NOT NEAR	Use Subject to add a condition that is based on strings in the E-mail's subject or in file names.  Values that correspond to Targets (T:), Target Groups (TG:), Custodians (C:), and Custodian Groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.
SubjectOrContent	String	CONTAINS ANYOF ALLOF NEAR NOT CONTAINS NOTALLOF NOT ANYOF NOT NEAR	SubjectOrContent is a composite attribute that allows you to add a condition that is based on strings in any of the following attributes: <ul style="list-style-type: none"> <li>• Email Subject</li> <li>• Email Body</li> <li>• File Name</li> <li>• File Content</li> </ul> Values that correspond to Targets (T:), Target Groups (TG:), Custodians (C:), and Custodian Groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case.
To	String	CONTAINS ANYOF ALLOF NOT CONTAINS NOT ANYOF NOT ALLOF	Use "To" to add a condition that is based on the E-mail's recipients.  Values that correspond to Targets (T:), Target Groups (TG:), Custodians (C:), and Custodian Groups (CG:) must be on a separate line. Prefixes such as T: and TG: must be in upper case

Table 5

## Operators

The rule definition language has two types of operators; single value operators and multi value operators.

### Single Value Operators

The following table lists the single value operators available with description.

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



Contains, NOT CONTAINS	Use for strings. Wildcards are allowed in the search values.
------------------------	--

**Table 6**

## Multiple Value Operators

The following table lists the multiple value operators available with description.

Operator	Description
ALLOF, NOT ALLOF	<p>Use for strings.</p> <p>Searches match items that contain (or do not contain) all the values you supply. For example:</p> <p>CC ALLOF bill@example.com ted@example.com</p> <p>The search matches only items that contain both addresses in the CC field.</p> <p>Wildcards are supported.</p>
ANYOF, NOT ANYOF	<p>Use for strings.</p> <p>Searches match the items that contain (or do not contain) any of the values you supply. For example:</p> <p>CC ANYOF bill@example.com ted@example.com</p> <p>This search matches items that contain one of the addresses or both addresses in the CC field.</p> <p>Wildcards are supported.</p>
BETWEEN, NOT BETWEEN	<p>Use for dates. For example:</p> <p>MailDate: BETWEEN date1, date2</p> <p>The earlier date must be placed first.</p>
NEAR, NOT NEAR	<p>Use for strings.</p> <p>Searches match items where the words that you specify are (or are not) within 50 words of each other. For example:</p> <p>Body NEAR contract money</p> <p>The search matches the items whose body contains the words “contract” and “money” within 50 words of each other.</p>

**Table 7**

## Review Status

The review status screen provides a quick summary of all cases you have access to and how far along reviewers are in the review process. The review status screen shows the case name, the total number of

items, the number of items unreviewed, reviewed, questioned, pending, and produced. It also shows a green progress bar, revealing the percentage of the review process completed for a particular case.

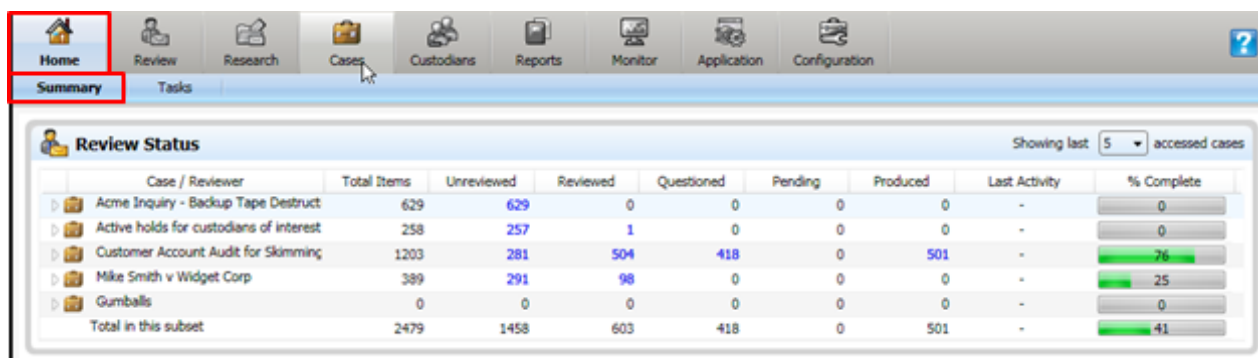


Figure 47

Clicking the small triangle to the left of the case name allows you to view the individual case reviewers and see what percentage of the review process was completed by each reviewer. Note that Auto Categorizer is the first reviewer listed under the Customer Account Audit for Skimming Case. The Auto Categorizer is part of the analytics feature, which allows an administrator to create a rule that will automatically mark and tag items, based upon criteria established in the rule.

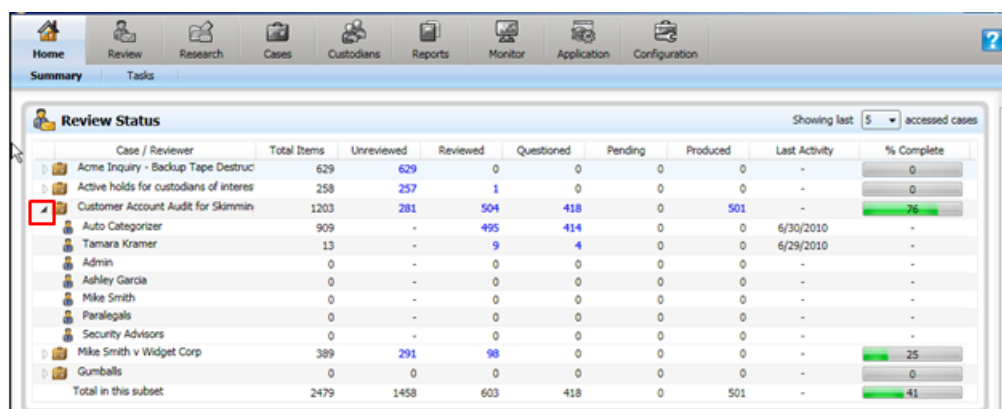


Figure 48

Item Attribute	Operator	Value
SubjectOrContent	CONTAINS	"stock price"
MailDate	BETWEEN	"5/1/2010", "2/28/2011"
AuthorOrRecipients	CONTAINS	'mike smith'

Table 8

The plus and minus icons beside a condition allows you to add an additional condition to a rule or remove one. Multiple conditions are joined together using AND/OR operators.

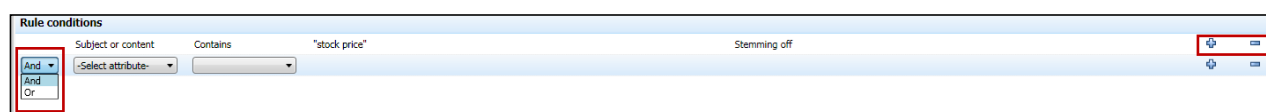


Figure 49

In addition to selecting the **ItemAttribute/Operator/Value**, you can choose whether to turn on or off stemming. Stemming allows you to match words deriving from the word you specify. For example, the word "walk" matches "walking" and "walked". Conditions that use wildcard characters cannot use stemming.

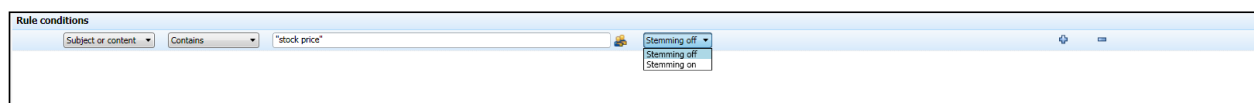


Figure 50

Depending on the attribute you select, your operators change. For example, by choosing *Subject or content*, operators to choose from are:

- Contains
- All of
- Any of
- Near
- Not Contains
- Not All Of
- Not Any Of

By selecting *Mail date*, for example, the operators change to equal to, less than, greater than, between, etc.

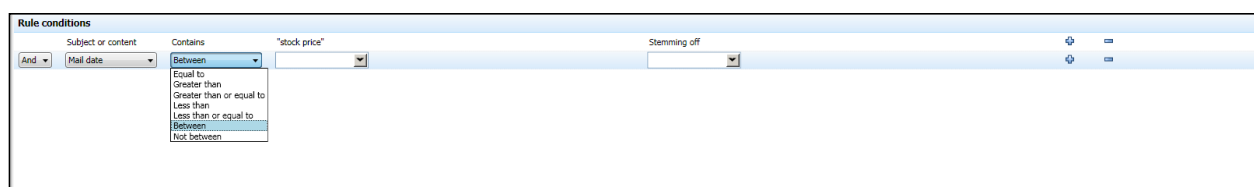


Figure 51

Clicking on the target picker icon allows the user to choose which custodian(s) or target(s) to add to a rule.

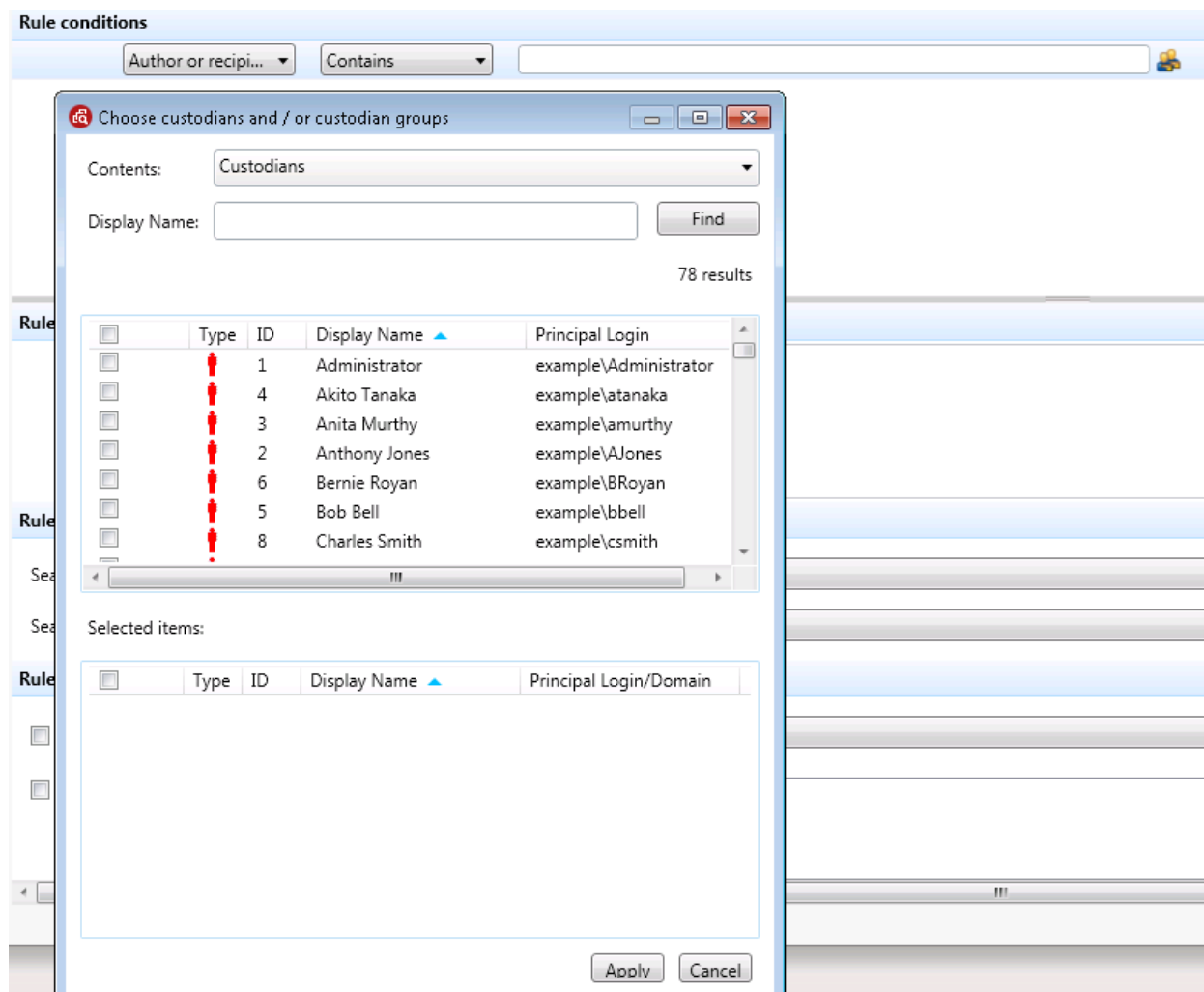


Figure 52

## Noise words

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

You can have your IT staff override this behavior by referring them to these articles from Microsoft.

<http://support.microsoft.com/?kbid=905617>

<http://msdn.microsoft.com/en-us/library/ms142551.aspx>

## Summary

This document showed how to effectively make use of the features in Enterprise Vault's Discovery Accelerator to assist you in performing effective reviewing. It detailed the Discovery Accelerator review screen and showed how reviewers can quickly narrow down their initial search results into a much smaller, more relevant subset. It showed how to mark, tag and make comments on items during the

review process. It also introduced bulk marking as a way to mark, tag, and comment upon multiple similarly grouped items at the same time. It discussed using filters, facets, and search within a case, to quickly reduce search results. It detailed marking similar and duplicate items during the review process.

- Search within a case (quick search and advanced search)
- Auto categorizing items by auto-marking or tagging them if the items match a specific rule's criteria
- The ability to review items as part of a larger, conversational thread
- Additional facets in the filtering section of the review screen
- Identification and grouping of duplicate items for the purpose of de-duplication

## 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](http://www.veritas.com).

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