

Symantec Discovery Accelerator™

Administrator's Guide

9.0

Symantec Discovery Accelerator: Administrator's Guide

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|---------------------------------|--|
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| Europe, Middle-East, and Africa | semea@symantec.com |
| North America and Latin America | supportsolutions@symantec.com |

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Introducing Discovery Accelerator

This chapter includes the following topics:

- [Key features of Discovery Accelerator](#)
- [About the Discovery Accelerator components](#)
- [The Discovery Accelerator process](#)
- [About the deduplication feature in Discovery Accelerator](#)
- [Product documentation](#)

Key features of Discovery Accelerator

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

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

About the Discovery Accelerator components

[Table 1-1](#) lists the primary Discovery Accelerator components.

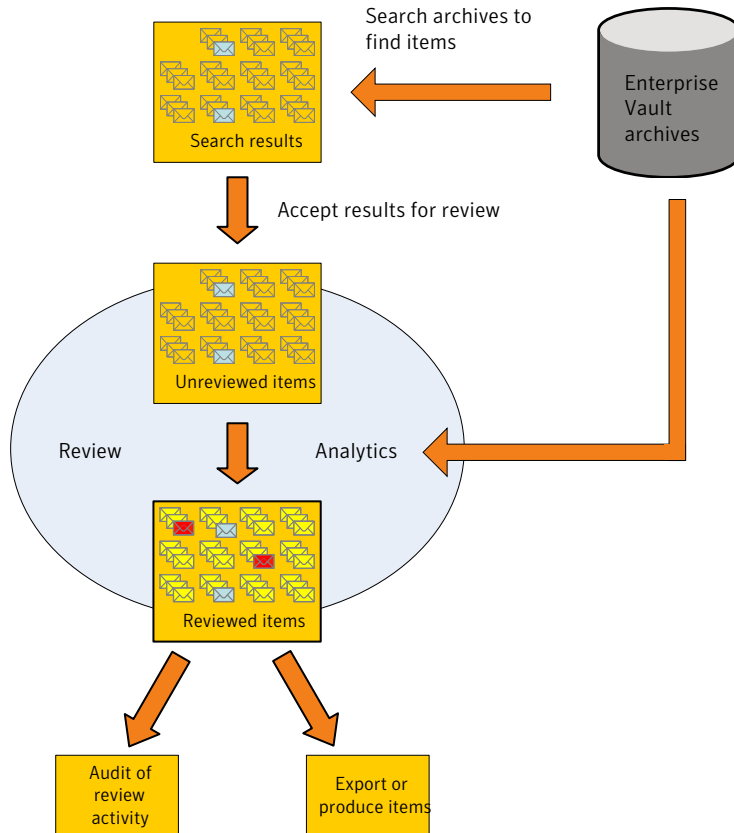
Table 1-1 The Discovery Accelerator components

| Component | Notes |
|---|--|
| Discovery Accelerator client | <p>The client is used by Discovery Accelerator administrators to set up and manage the system and by reviewers to access the items that they are to mark.</p> <p>See “About the Discovery Accelerator client” on page 19.</p> |
| Accelerator Manager Web site | <p>This Web site lets you set up multiple Discovery Accelerator databases in which to store your data.</p> |
| Enterprise Vault Accelerator Manager service | <p>This service handles the requests from the Discovery Accelerator client and works with the Enterprise Vault components to access archives, perform searches, and so on.</p> |
| Customer database | <p>The customer database is a SQL database in which Discovery Accelerator stores details of cases, user roles, search results, review marks and tags, and more.</p> <p>You can set up multiple customer databases.</p> |
| Configuration database | <p>The configuration database is a SQL database that specifies the location of the customer databases and stores details of the SQL Server, database files, and log files to use.</p> |
| Custodian Manager Web site (optional) | <p>This Web site lets you store the details of the <i>custodians</i> (individual employees) and custodian groups for which you want to search with Discovery Accelerator. A custodian group is any collection of employees, such as Windows or Domino groups and distribution lists, Active Directory or Domino LDAP searches, and Active Directory containers.</p> <p>See “About Custodian Manager” on page 81.</p> |
| Discovery Accelerator API Web site (optional) | <p>This Web site lets you use the Discovery Accelerator API to integrate third-party tools with the software, and thereby retrieve data from or export it to a Discovery Accelerator customer database.</p> <p>For more information on the Discovery Accelerator API, contact Symantec Support.</p> |

The Discovery Accelerator process

Figure 1-1 provides an overview of the steps in the discovery process.

Figure 1-1 Steps in the Discovery Accelerator process



You typically perform the steps in the Discovery Accelerator process in the following order:

- The Discovery Accelerator system administrator sets up a case. All the messages and files that relate to the case are already stored in Enterprise Vault archives. Typically, mailbox archives are journal mailbox archives, but you can include individual user mailboxes in searches. You can also search public folder, file system, and SharePoint archives.
- A user with search permissions creates a search of journal mailboxes and file system archives.

The searches that you create with Discovery Accelerator are highly configurable. The criteria that you specify can include words and phrases to search for, date ranges, message size and type, author and recipient details, attachment details, and more.

- When the search finishes, the user who ran the search can check that the results are as expected. If the user chooses to accept the results, Discovery Accelerator adds them to the case review set.
 - The administrator assigns the items in the case review set to reviewers so that they can view and mark them.
- Optionally, the administrator can choose to enable *analytics* on the case. This facility provides additional analyses of the metadata and content of items that are collected in the case. Among the extra benefits that analytics provides are the options to do the following:

- Set up rules by which Discovery Accelerator automatically marks or categorizes the items that it adds to the case. Classifying large numbers of items without much human intervention ultimately results in better and smaller review sets for manual review.
- Examine and review entire conversation threads in one view.
- Conduct quick or advanced searches within the items in a case.

These facilities deliver a new review experience that is known as *Guided Review*.

- The marked items are published in a suitable form. The available formats include PST, Domino NSF database, HTML, and MSG.
- You can choose to produce or export the items. The production process generates a Bates number for each item. This process also locks the item to stop reviewers from changing the mark that is assigned to it. The export process does not generate a Bates number for an item or lock the item, so reviewers can continue to work on it.

About the deduplication feature in Discovery Accelerator

Discovery Accelerator provides a deduplication feature. The purpose of this feature is to minimize review, export, and production times by letting you identify and exclude similar items and duplicate items. Discovery Accelerator considers items to be similar when they have the same metadata properties, such as author display names, subjects, and number of attachments. Duplicate items have exactly the same content as well as the same metadata properties. The option to identify and exclude duplicate items is available only in cases that you have enabled for

analytics. This is not true of similar items, however, which you can identify and exclude in all cases.

Product documentation

[Table 1-2](#) lists the documentation that is available for Discovery Accelerator.

Table 1-2 The Discovery Accelerator documentation set

| Document | Comments |
|-----------------------|--|
| Installation Guide | Outlines how to perform a first-time installation of the Discovery Accelerator server and client software. |
| Upgrade Instructions | Explains how to upgrade an existing installation of Discovery Accelerator to version 9.0. |
| Administrator's Guide | Provides information for Discovery Accelerator administrators on how to set up and assign roles, search for items to include in the review set, export items for offline review, create reports, and more. |
| Reviewer's Guide | Describes the features of the Discovery Accelerator client that are available to reviewers. |
| Online Help | Accompanies all the Discovery Accelerator applications and provides extensive information on how to use their facilities. |
| Release Notes | Provides late-breaking information that you may need to be aware of before you install and use Discovery Accelerator. |
| Best Practices Guide | Provides extensive information on how best to plan for and implement Discovery Accelerator. To obtain this guide, go to the following page of the Symantec Enterprise Support site: http://www.symantec.com/docs/TECH159520 |

White papers on the Symantec Enterprise Support site

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

<http://www.symantec.com/docs/DOC3621>

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

<http://www.symantec.com/docs/TECH88031>

"How To" articles on the Symantec Enterprise Support site

Most of the information in the Discovery Accelerator manuals is also available online as "How To" articles on the Symantec Enterprise Support site. You can access these articles by searching the Internet with any popular search engine, such as Google, or by following the procedure below.

To access the "How To" articles on the Symantec Enterprise Support site

- 1 Type the following in the address bar of your Web browser, and then press **Enter**:
http://www.symantec.com/business/support/all_products.jsp
- 2 In the Supported Products A-Z page, choose **Enterprise Vault Discovery Accelerator**.
- 3 In the **Product Support** box at the right, click **How To**.
- 4 Search for a word or phrase by using the Knowledge Base Search feature, or browse the list of most popular subjects.

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Please include the following information with your comment:

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- The topic (if relevant) on which you want to comment.
- Your name.

Email your comment to evdocs@symantec.com. Please only use this address to comment on product documentation.

We appreciate your feedback.

Introducing the Discovery Accelerator client

This chapter includes the following topics:

- [About the Discovery Accelerator client](#)
- [Opening and closing the Discovery Accelerator client](#)
- [Finding your way around the Discovery Accelerator client](#)

About the Discovery Accelerator client

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

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

Opening and closing the Discovery Accelerator client

If you add a shortcut to the Discovery Accelerator client to the Windows desktop, you can open the client by double-clicking the shortcut. Alternatively, you can open the program by clicking the program name in the Windows **Start** menu.

To open the Discovery Accelerator client

- 1
- On the Windows **Start** menu, click the shortcut for the Discovery Accelerator client.

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

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

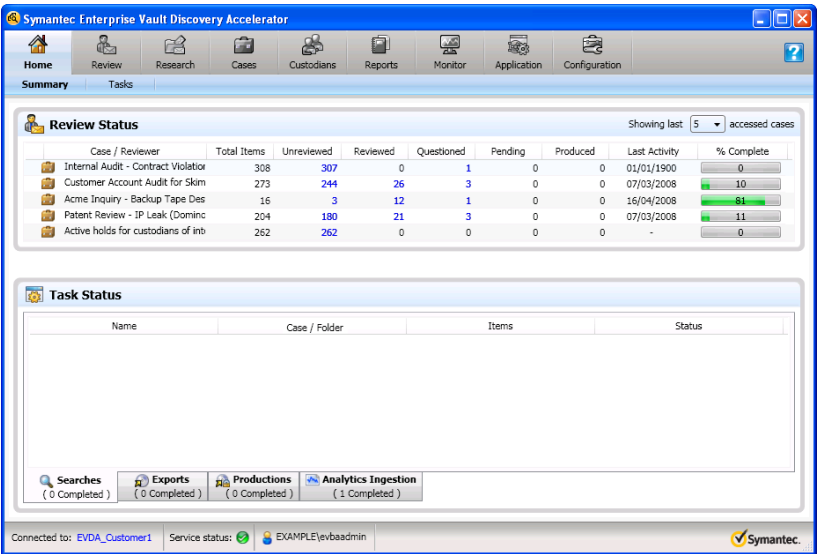
You can type the IP address in either IPv4 or IPv6 format.

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

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

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

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



To close the Discovery Accelerator client

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

Finding your way around the Discovery Accelerator client

In the Discovery Accelerator client, the roles to which you have been assigned determine the features that you can access. [Table 2-1](#) describes the features that users with the most permissive roles can access. Discovery Accelerator administrators can assign multiple different roles to users and change the permissions that are associated with the roles.

Table 2-1 Primary tabs in the Discovery Accelerator client






| Icon | Tab | Description |
|---|------------|---|
|  | Home | This tab provides a headline view of the status of the activities that you perform in Discovery Accelerator. It also gives you quick access to the activities that you are likely to perform frequently with Discovery Accelerator. |
|  | Review | This tab lets you view the items in the review set and assign marks and comments to them. |
|  | Research | This tab lets you set up research folders where you can work privately on the items that interest you without generating additional work for other Discovery Accelerator reviewers. |
|  | Cases | This tab lets you open and manage cases. You can also enable analytics on your cases so that you can perform additional analyses of the metadata and content of the items that you have collected in them. |
|  | Custodians | <p>This tab lets you set up email <i>targets</i>, which you can include in the criteria of a Discovery Accelerator search. A target is a shorthand way of specifying all the email addresses of an employee so that you do not need to enter them all when you set up a search.</p> <p>The tab also provides a link to the Custodian Manager Web site, where you can specify the details of custodians and custodian groups for which you want to search with Discovery Accelerator.</p> <p>See “About Custodian Manager” on page 81.</p> |

Table 2-1 Primary tabs in the Discovery Accelerator client (*continued*)





| Icon | Tab | Description |
|---|-------------|---|
|  | Reports | This tab lets you generate reports on various aspects of Discovery Accelerator, including the progress of reviewers and their roles and responsibilities. |
|  | Monitor | This tab lets you monitor the status of all Discovery Accelerator searches and pause or resubmit them as necessary. |
|  | Application | <p>This tab provides access to a range of commonly used administrative facilities. The options that are available when you click this tab may include the following:</p> <ul style="list-style-type: none"> ■ Roles. Set up and amend the roles that you can assign to users to manage their access to Discovery Accelerator facilities. ■ Role Assignment. Assign Discovery Accelerator roles to users. ■ Marks. Set up and edit the marks that reviewers can apply to each item to indicate whether it is relevant to the case. ■ Tags. Define secondary sets of marks, called <i>tags</i>, which reviewers can apply to items in the review set. ■ Archives. Customize the list of Enterprise Vault archives in which Discovery Accelerator searches for items. You can also choose to hide selected vault stores from case administrators so that they cannot conduct searches of the archives in those vault stores. |

Table 2-1 Primary tabs in the Discovery Accelerator client (*continued*)

| Icon | Tab | Description |
|---|---------------|--|
|  | Configuration | <p>This tab provides access to a range of configuration facilities that you are likely to use infrequently. The options that are available when you click this tab may include the following:</p> <ul style="list-style-type: none"> ■ Search schedules. Set up schedules with which you can run Discovery Accelerator searches repeatedly, at scheduled times. ■ Search Attributes. Specify the details of custom attributes that you can include in your search criteria. ■ Import Configuration. Import configuration data into Discovery Accelerator from an XML file. ■ Account Information. Supply the details of multiple Windows domains from which you can choose when you add a new user to your Discovery Accelerator system. ■ Settings. Set hundreds of configuration options with which you can customize the appearance and performance of Discovery Accelerator. |

Setting up and assigning roles

This chapter includes the following topics:

- [About the predefined Discovery Accelerator roles](#)
- [About the Discovery Accelerator permissions](#)
- [Creating Discovery Accelerator roles](#)
- [Assigning Discovery Accelerator roles to users](#)

About the predefined Discovery Accelerator roles

You assign roles to users to determine what they can access and the activities that they can perform in Discovery Accelerator. Some roles are effective at the application level, across the entire Discovery Accelerator system, whereas others apply at the case level or folder level only.

When a case is created, only its owner can access it. Other users do not see the case until the owner grants at least one permission that is related to it. Discovery Accelerator roles provide a logical way to group multiple specific permissions according to job function.

[Table 3-1](#) describes the predefined roles that come with Discovery Accelerator. If none of these roles precisely meets your needs, you can create your own.

Table 3-1 Predefined roles

| Role | Description | Default permissions |
|-------------------------|--|--|
| Case Administrator | This role lets you perform administrative activities within a specific case. These activities include case management and role assignment. | <ul style="list-style-type: none"> ■ Configure Case Properties. ■ Role Assignment. |
| Discovery System Admin | This role lets you perform all administrative activities within Discovery Accelerator. You can create and manage cases, assign application-wide roles to users, and import configuration data from XML files. | <ul style="list-style-type: none"> ■ Create and Configure Cases. ■ Export Configuration Data. ■ Import Configuration Data. ■ Manage Administration Security. ■ Manage Archives. ■ Manage Global Target and Target Groups. ■ Manage Marks. ■ Manage Roles. ■ Manage Schedules. ■ Manage Search Attributes. ■ Modify System Configuration. ■ Monitor Search. ■ View System Configuration. |
| Folder Capture Messages | This role lets you search for new items to add to a research folder. | <ul style="list-style-type: none"> ■ Search. |
| Folder Export | This role lets you export or produce items from a research folder for offline review. | <ul style="list-style-type: none"> ■ Production. |
| Folder Full Control | <p>This role lets you search for new items to add to a research folder, review them, and export or produce them for offline review.</p> <p>You can also give other users access to your folder so that they can participate in the review process.</p> | <ul style="list-style-type: none"> ■ Assign. ■ Configure Folder Properties. ■ Delete Folder. ■ Manage Analytics. ■ Manage Automatic Categorization. ■ Production. ■ Review. ■ Role Assignment. ■ Search. |
| Folder Review | This role lets you review and mark the items in a research folder. | <ul style="list-style-type: none"> ■ Review. |

About the Discovery Accelerator permissions

The following tables provide more information on the permissions that you can associate with user roles.

Table 3-2 Application permissions

| Permission | Description |
|--|---|
| Allow Archive Selection in Research Folder | Select the vault stores and archives to use when you conduct a search in a research folder. |
| Copy Research Items | Copy the items from a research folder to the case review set. |
| Create and Configure Cases | Create new cases and assign owners to them, and edit the properties of existing cases. |
| Create Research Folder | Set up research folders that are not linked to any case. |
| Delete Case | Delete the selected cases and all the objects that are associated with them (case-specific searches, user folders, targets and target groups, and so on). |
| Export Configuration Data | Use the ImportExport command-line utility to export configuration data from the Discovery Accelerator database to an XML file. See “About the ImportExport command” on page 212. |
| Export Research Items | Export the items in a research folder for offline review. |
| Import Configuration Data | Load configuration data into the Discovery Accelerator database from an XML file, and view the import log. |
| Manage Administration Security | Assign application-wide roles to users. However, application administrators cannot assign case roles to users, as only case administrators can assign these roles. |

Table 3-2 Application permissions (*continued*)

| Permission | Description |
|--|---|
| Manage Archives | Customize the list of Enterprise Vault archives in which Discovery Accelerator searches for items. You can also choose to hide selected vault stores from case administrators so that they cannot conduct searches of the archives in those vault stores. |
| Manage Global Target and Target Groups | Create, edit, and delete application-wide targets and target groups. These provide a shorthand way to supply multiple email addresses when you define the criteria for a search. |
| Manage Marks | Create and edit the marks that are available to all cases. However, this permission does not give access to the marks that are created in a case. |
| Manage Roles | Add and remove application and case roles, and select the permissions to assign to each role. |
| Manage Schedules | Create, edit, and delete schedules, with which you can define when a future search or recurrent search is to run. |
| Manage Search Attributes | Make additional, customized attributes available for searches. |
| Modify System Configuration | Change the Discovery Accelerator system properties. You can also customize the appearance, performance, and functionality of Discovery Accelerator. |
| Monitor Search | Monitor the status of searches across all cases and pause and resubmit searches, even if you do not normally have access to the associated cases. However, you cannot view the search criteria or the results of the searches unless you normally have access permission. |
| Promote Research to Case | Convert a research folder into a case. |
| View System Configuration | View the Discovery Accelerator system properties and configuration options that determine the appearance, performance, and functionality of the application. |

Table 3-3 Case and folder permissions

| Permission | Description |
|---------------------------------|---|
| Assign | Assign the items in the case or research folder to individual reviewers. |
| Commit Reviewed Folder Messages | Add items from a research folder to the case review set. This permission requires the Perform Ad Hoc Searches permission. |
| Configure Case Properties | Change the properties of a case, such as its name, status, and owner. |
| Configure Folder Properties | Change the properties of folder, such as its name and export location. |
| Delete Case | Delete the current case and all the objects that are associated with it (case-specific searches, user folders, targets and target groups, and so on). |
| Delete Folder | Delete the research folders in which users have stored items for review. |
| Manage Analytics | Enable or disable the analytics feature in a case or folder. You can also pause or resume analytics. |
| Manage Archives | Set the list of archives in which to search. |
| Manage Automatic Categorization | Create, edit, and delete the analytics rules by which Discovery Accelerator applies marks and tags to items automatically. |
| Manage Legal Holds | Place holds on the items in a case to prevent users from deleting them. |
| Manage Marks/Tags | Select the review marks, tags, and tag groups that are available to reviewers in a case or research folder. |
| Manage Targets | Create, edit, and delete the email targets and target groups that you can include in the criteria of a search. |
| Perform Ad Hoc Searches | Possess the full research permissions to create, edit, and delete research folders, search for items to store in those folders, and review those items. |
| Production | Undertake export runs and production runs. |

Table 3-3 Case and folder permissions *(continued)*

| Permission | Description |
|--------------------------------------|---|
| Review | Review items and assign marks and comments to them. |
| Role Assignment | Assign roles to users in a case. |
| Search | Undertake searches for items to store in the review set. |
| Search Preview | Preview the results of a search before you accept them. This permission requires the Search permission. |
| Show Reviewer Summaries On Home Page | View a summary of reviewer activity on the home page of the Discovery Accelerator client. |
| View Reports | Create and view reports. |

About the facility to allow or deny permissions

As well as selecting the permissions that you want to associate with a role, you can also choose to deny certain permissions to users who occupy the role. By denying the permissions, you stop users from acquiring them when they are assigned to other roles that do allow the permissions.

For example, suppose that you want to prevent some users from accessing all the facilities in the Discovery Accelerator client except for the search facility. To achieve this, you would assign the users to a role in which you have set the Search and Search Preview permissions to Allow, but you have set all the other permissions to Deny. Even if the users are assigned to other roles that grant them additional permissions, they cannot exercise them; the Deny permissions take precedence.

Some predefined roles have permissions that you cannot revoke because they are fundamental to the roles. For example, you cannot set the Role Assignment permission for the Case Administrator role to Deny. In the Role Details pane of the Discovery Accelerator client, these permissions are dimmed to show that you cannot change them.

Creating Discovery Accelerator roles

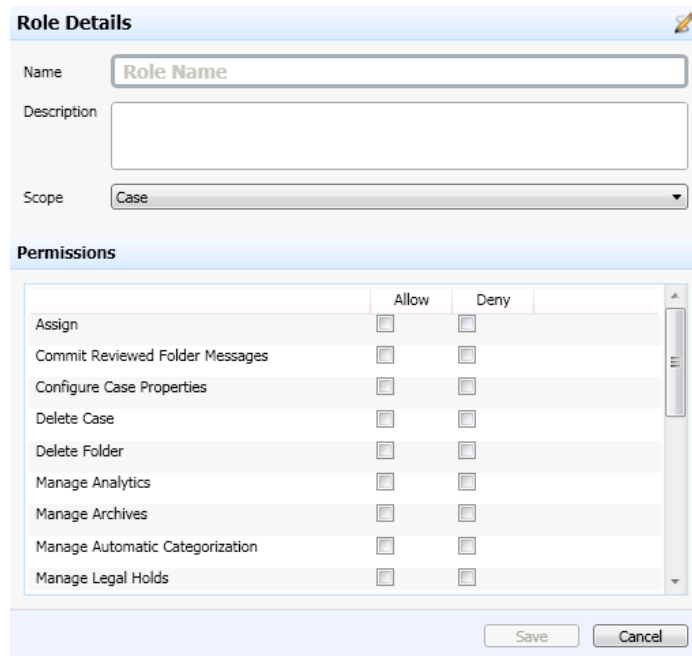
If none of the predefined roles provides the exact set of permissions that you want to assign to users, you can create your own roles.

You must have the Manage Roles permission to create roles. By default, users with the role of Discovery System Admin have this permission.

To create a role

- 1 Click the **Application** tab in the Discovery Accelerator client, and then click the **Roles** tab.
- 2 Click **New** at the top of the window.

The Role Details pane appears.



| | Allow | Deny |
|---------------------------------|--------------------------|--------------------------|
| Assign | <input type="checkbox"/> | <input type="checkbox"/> |
| Commit Reviewed Folder Messages | <input type="checkbox"/> | <input type="checkbox"/> |
| Configure Case Properties | <input type="checkbox"/> | <input type="checkbox"/> |
| Delete Case | <input type="checkbox"/> | <input type="checkbox"/> |
| Delete Folder | <input type="checkbox"/> | <input type="checkbox"/> |
| Manage Analytics | <input type="checkbox"/> | <input type="checkbox"/> |
| Manage Archives | <input type="checkbox"/> | <input type="checkbox"/> |
| Manage Automatic Categorization | <input type="checkbox"/> | <input type="checkbox"/> |
| Manage Legal Holds | <input type="checkbox"/> | <input type="checkbox"/> |

Save Cancel

- 3 In the right pane, type a unique name and an optional description for the role.

The role name can contain up to 50 characters. The description can contain up to 250 characters.

- 4 In the **Scope** box, choose whether to make the permissions that are associated with the role effective throughout the application or at the case level only. Application roles grant permissions that are related to the overall structure and configuration of the entire customer database. Case roles grant permissions that are specific to the associated cases.

Users with application roles can only perform tasks in a specific case if they have been assigned the appropriate roles in that case. To perform tasks in more than one case, the users must be assigned the appropriate role in every case that they need to access.

The selection that you make determines the permissions that are available.

- 5 Choose the permissions to associate with the role.

See [“About the Discovery Accelerator permissions”](#) on page 27.

- 6 Click **Save**.

Assigning Discovery Accelerator roles to users

You assign roles to employees or employee groups to determine what they can access and the tasks that they can perform in Discovery Accelerator.

You must have the application permission Manage Administration Security to assign an application-wide role to a user. You require the case permission Role Assignment to assign a case-specific role. By default, Discovery System Admin users have the first permission, whereas Case Administrator users in a case have the second. If you have yet to open any cases, you must do so before you can assign roles to the users in those cases.

See [“Opening new Discovery Accelerator cases”](#) on page 36.

To assign a role to a user

- 1 Do one of the following:
 - To assign an application role, click the **Application** tab in the Discovery Accelerator client, and then click the **Role Assignment** tab.
 - To assign a case role, click the **Cases** tab and then click the required case in the left pane. Then click the **Role Assignment** tab.
If Discovery Accelerator lists a lot of cases, you can filter the list with the fields at the top of the pane. As well as filtering the cases by name, you

can choose whether to list any research folders that are associated with them.

- 2 Click the name of the user to whom you want to assign a role.
If the user does not appear in the list, click **Add** at the top of the pane and then select the user to add to it.
- 3 In the right pane, do one of the following:
 - Click **Add** to assign a new role.
 - Click **Remove** to remove the selected role.
- 4 Click **Save**.
- 5 If you want to notify the selected user that he or she can now perform a ClickOnce installation of the Discovery Accelerator client, click **Send Email Invite**. Discovery Accelerator creates a new message that is ready to send to the user. Note that this facility is unavailable in Discovery Accelerator clients that you install with the MSI installer package.

To customize the subject line and body text of the notification message, follow these steps:

- Click the **Configuration** tab, and then click the **Settings** tab.
- Expand the **General** section to show the available options.
- Set the required values for the **DA Invitation Email Subject** and **DA Invitation Email Body** options.

Working with cases

This chapter includes the following topics:

- [About Discovery Accelerator cases](#)
- [Opening new Discovery Accelerator cases](#)
- [Checking the progress of Discovery Accelerator cases](#)
- [Implementing analytics in Discovery Accelerator cases](#)
- [Deleting Discovery Accelerator cases](#)

About Discovery Accelerator cases

Everything that is related to a discovery action, including user permissions, item reviewers, the marking scheme, the tagging scheme, searches, analyses, and the set of items to be reviewed, is grouped in a *case*. Within a single Discovery Accelerator system, reviewers can work on multiple cases at the same time.

Discovery Accelerator provides an additional option with which you can enable *analytics* on a case or a research folder. This option provides additional analyses of the metadata and content of items that are collected in the case.

Any new cases that you create with Discovery Accelerator 9.0.4 comply with the U.S. government's Federal Information Processing Standards (FIPS) for encoding and encrypting data. This is also true of any cases that you created with older and non-FIPS-compliant versions of Discovery Accelerator, provided that you did not enable analytics in these cases. If you have enabled analytics in these old cases then, after you upgrade to Discovery Accelerator 9.0.4, you can make the cases FIPS-compliant by disabling analytics and then reenabling it.

Opening new Discovery Accelerator cases

You must have the Create and Configure Cases permission to open new cases. By default, only users with the role of Discovery System Admin have this permission.

See [“About the Discovery Accelerator permissions”](#) on page 27.

To open a new Discovery Accelerator case

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

Enable Analytics

Disable Analytics

GoTo Review

Refresh Case

Case

Name:

Case Status:

Open

Owner:

Select Owner...

Legal Holds

Put items on hold: ☒

Reason:

Status:

Number of items:

Number of holds: 0

Number of errors: 0

Number of items not found: 0

Remaining items: 0

Information

Save

Cancel

- 4
- Set the properties of the case. The table below describes the available fields.

| Case | |
|-------------|--|
| Name | Identifies the case. Choose a name that indicates the nature of the case or the client. |
| Case Status | Determines whether case administrators and reviewers can access the case (Open) or not (Closed). |

| | |
|-------|---|
| Owner | <p>Specifies the Windows account of the user who is to have special privileges to manage the case. Click Select Owner to choose the owner from a list. A case cannot have multiple owners.</p> <p>If you change the name of the case owner, the original owner still retains administrative permissions. To prevent this, use the Role Assignment facility in the case to remove the assigned roles from the original owner.</p> <p>See “Assigning Discovery Accelerator roles to users” on page 32.</p> |
|-------|---|

Legal Holds

| | |
|---------------------------|--|
| Put items on hold | <p>When this option is checked, places a hold on the items in the case so that users cannot delete them from the source Enterprise Vault archives.</p> <p>You must have the Manage Legal Holds permission to place holds on the items in a case. By default, all case administrators have this permission.</p> |
| Reason | Provides a space for you to describe why you have placed the items on hold. |
| Status | Shows whether Discovery Accelerator is currently applying legal holds in the case. |
| Number of items | Shows the total number of items in the case. |
| Number of holds | Shows the number of items that Discovery Accelerator has placed on hold. |
| Number of errors | Shows the number of items that Discovery Accelerator has temporarily been unable to place on hold. By default, Discovery Accelerator makes two attempts to place an item on hold each time it performs a legal hold scan. |
| Number of items not found | Shows the number of items that Discovery Accelerator cannot place on hold because they no longer exist in the source Enterprise Vault archives. |
| Remaining items | Shows the number of items that Discovery Accelerator has yet to place on hold. |
| Information | Contains some information messages on the progress that Discovery Accelerator has made in placing the items on hold. |

Production details

| | |
|-----------------------|---|
| Size of the export ID | For each item that you export or produce, specifies the number of digits to use for the export number in its file name. The default is 6. |
| Next export number | Specifies the export number to include in the file name of the next item that you export or produce. |
| Prefix | For each item that you export or produce, specifies the text to use as a prefix in its file name. You may want to use letters to identify the items in accordance with legal or company convention. |
| Show Example | Displays a preview of the next export ID. |
| Output folder | <div>Specifies the folder in which to store the items that you export or produce. By default, this folder is <code>C:\</code> on the server that is running the Enterprise Vault Accelerator Manager service. To export the items to another computer, specify the path to a shared network drive, as in <code>\\my_computer\exports</code>.</div> <div>The folder path can contain up to 100 characters.</div> |

Search details

| | |
|-------------------------|---|
| Searchable Vault Stores | Specifies the vault stores in which to search for the items that are relevant to the case. Check or uncheck the box next to each vault store to include it in searches or exclude it from searches. |
|-------------------------|---|

5 Click **Save**.

Checking the progress of Discovery Accelerator cases

After you have given users permission to review the items in a case, you can monitor their progress. Where appropriate, you can change the number of items that you have assigned to the reviewers.

You must have the Assign permission in a case to monitor the progress that reviewers have made and change their review assignments.

To check the progress of a Discovery Accelerator case

- 1 Click the **Cases** tab in the Discovery Accelerator client.
- 2 In the left pane, click the case whose progress you want to check.

3 Click the **Review Assignment** tab.

The Review Assignment pane appears.

Reviewers

| Reviewer | Assigned | Marked | Unmarked | % Marked |
|---------------|----------|--------|----------|----------|
| EVBAAdmin | 0 | 0 | 0 | 0 |
| Jack Dilla... | 125 | 0 | 125 | 0 |

Case Summary

| | Marked | Unmarked | % Marked |
|------------|--------|----------|----------|
| Case total | 308 | 307 | 0 |
| Assigned | 125 | 125 | 0 |
| Unassigned | 183 | 182 | 1 |

Jack Dillans

☒ Assign 182 of 182 Unmarked unassigned items

☐ Assign by item attribute

Include Unmarked unassigned items

☒ Item date:

☐ 2008 (34)
☐ 2007 (121)
☐ 2006 (27)

☐ Item tag:

There are no unassigned items available.

☒ Move 125 of 125 Unmarked to Case

Apply

4 Assess the progress that the reviewers have made.

To change the number of items that are assigned to reviewers

- 1 In the **Reviewers** box in the **Review Assignment** tab, click the names of the reviewers for whom you want to change the number of assigned items.

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

- 2 Do one or more of the following:

- To assign all the unassigned and unmarked items equally between the selected reviewers, click **Auto-Assign Items** and then click **Assign Items**.
- To assign a specific number of items to the selected reviewers, click **Assign *n* of *m* unassigned items** in the right pane and then type the required number of items.
- To assign items by category, such as one or more date ranges or one or more tags that Discovery Accelerator has applied to the items, click **Assign by item attribute** in the right pane and then select the required option.

- To move a specific number of items from the selected reviewers to another reviewer or back to the case review set, click **Move** in the right pane and then type the required number of items.
 - To remove all the items that you have assigned to the selected reviewers and return them to the case review set, click **Remove Assigned Items** and then click **Remove Items**.
- 3 Click **Apply**.

Implementing analytics in Discovery Accelerator cases

The analytics feature lets you collect as much information about the items found in a case as possible. Discovery Accelerator stores this information in the customer database, where it can exploit the full-text indexing functions of SQL Server. With the information stored and indexed, you can efficiently analyze it and determine exactly what is relevant.

A number of additional facilities become available in Discovery Accelerator after it has collected and indexed the analytics data. You can do the following:

- Set up rules by which Discovery Accelerator automatically marks or categorizes the items that it adds to the case.
See [“About analytics rules”](#) on page 57.
- Conduct searches within specific items in a case.
See [“Searching within the review set”](#) on page 128.
- Examine and review entire conversation threads in one view.
See [“Finding all items in the same conversation”](#) on page 133.

Enabling a Discovery Accelerator case for analytics

When you create a case, analytics is not enabled by default. The reason for this is that you may need to provision and control the SQL Server resources that are necessary for analytics, and these may not be immediately available. After you enable a case for analytics, case items including content, attachments, and item metadata such as subject, recipients and other attributes, are fetched into the customer database. If you have already built analytics rules for a case before you enable it, the automatic categorization of items begins soon after collection starts.

Before you enable a case for analytics, note the following:

- You must have the Manage Analytics permission to enable analytics.

- The Vault Service account requires various permissions on the msdb system database. See the *Installation Guide* for instructions on how to assign these permissions.
- The version of Discovery Accelerator with which you enable analytics in a case determines whether Discovery Accelerator uses FIPS-compliant algorithms to identify and deduplicate the case items. (FIPS, or Federal Information Processing Standards, are U.S. government standards for encoding and encrypting data.) That is:
 - Cases in which you enable analytics with Discovery Accelerator 9.0.4 are FIPS-compliant, even if you created them with an older and non-FIPS-compliant version of Discovery Accelerator.
 - You can ensure FIPS compliance for any pre-9.0.4 cases in which you previously enabled analytics by disabling analytics and then reenabling it with Discovery Accelerator 9.0.4.

To enable a Discovery Accelerator case for analytics

- 1 Click the **Cases** tab in the Discovery Accelerator client.
- 2 In the left pane, select the case that you want to enable for analytics.
- 3 Click the **Analytics** tab.

The Analytics pane appears.

The screenshot shows the 'Analytics' tab in the Discovery Accelerator client. At the top, there is a status bar indicating 'Analytics disabled' with a minus icon, an 'Enable' button, and a 'Refresh data' button. Below this, a timestamp reads 'Last refreshed at : 13/08/2009 14:31:50'. The main content area is divided into three sections: 'Marks and tags' with links for 'Define marks' (showing 4 marks defined) and 'Define tags' (showing 0 tags defined); 'Automatic categorization' with a link for 'Define rules'; and a table for 'Marking Rules (0)' and 'Tagging Rules (0)'. The table has columns for Priority, Rule name, Rule actions, and # of items cati.

- 4 If you want to define any case-specific review marks or tags before you enable the case for analytics, click the appropriate hyperlink and then enter the details.

See [“About review marks”](#) on page 47.

- 5 If you want to define any rules for automatically categorizing the items in the case, click the **Define rules** hyperlink and then set up the required marking rules and tagging rules.

See [“About analytics rules”](#) on page 57.

- 6 Click **Enable**.

Initially, the case's status changes to "Enabling analytics" while the collection of data is prepared. Subsequently, the status changes to "Analytics enabled" and the collection and indexing of data and the automatic categorization of items begin.

Monitoring the progress of analytics data collection

After you have enabled a case or folder for analytics, you can monitor the progress that Discovery Accelerator makes while it collects and analyses items. You can do this by viewing the **Analytics** tab in the Discovery Accelerator client. [Table 4-1](#) describes the information that each area of this tab provides.

Table 4-1 Areas in the **Analytics** tab

| Area | Description |
|-----------------------|---|
| Data collection | <p>The Data collection area shows the progress of analytics data collection. The fields are as follows:</p> <ul style="list-style-type: none"> ■ Started at and Completed at. Shows the dates and times between which Discovery Accelerator undertook data collection. ■ Successfully collected items. Shows the number of items that Discovery Accelerator has collected from the Enterprise Vault archives, and the total number of items to be collected. ■ Permanent failed items. Shows the number of items that Discovery Accelerator has failed permanently to collect. ■ Temporary failures. Shows the number of items that Discovery Accelerator has failed temporarily to collect. For example, these items may be on a tape that was unavailable at the time of collection. ■ Items with no indexable content. Shows the number of items that do not have any content that Discovery Accelerator can collect. These items may be encrypted items, or they may be in a form that Enterprise Vault cannot convert to HTML. ■ Items deleted from Enterprise Vault. Shows the number of items that Discovery Accelerator cannot collect because they no longer exist in the Enterprise Vault archives. These types of items are marked as permanently failed items. <p>If Discovery Accelerator fails to collect certain items, you can try to collect them again by following these steps:</p> <ol style="list-style-type: none"> 1 Click Error details. 2 In the Error management window, click Retry failed items. |
| Conversation analysis | <p>The Conversation analysis area shows the progress that Discovery Accelerator has made in identifying the items in the same conversation thread. The fields are as follows:</p> <ul style="list-style-type: none"> ■ Analyzed items. Shows the number of items that Discovery Accelerator has analyzed for conversations. ■ Conversation threads found. Shows the number of threads that Discovery Accelerator has identified. |
| Marks and tags | <p>Shows the number of marks and tags that you have defined for the case or folder. Click the Define marks and Define tags hyperlinks to set up additional ones.</p> |

Table 4-1 Areas in the **Analytics** tab *(continued)*

| Area | Description |
|--------------------------|---|
| Automatic categorization | <p>The Automatic categorization area summarizes the progress that Discovery Accelerator has made in automatically categorizing the items. This process takes place in parallel with the collection of data, if you defined analytics rules before you enabled the case or folder for analytics. When Discovery Accelerator categorizes the items, the marks and tags that it applies are immediately available in the Review tab.</p> <p>If the rules that you have created match too many or too few items, you can change the rules to produce better results.</p> <p>Discovery Accelerator lists marking rules and tagging rules separately. In both cases, Discovery Accelerator lists each rule's name and actions, together with the number of items that the rule has categorized. In the case of marking rules, Discovery Accelerator also shows the priority level of each rule.</p> <p>Note: After you enable a case or folder for analytics, there is a one-hour delay before automatic categorization begins. So, the Automatic categorization area can show that your rules have not marked or tagged any items, even after Discovery Accelerator has started to collect data.</p> |

Pausing and resuming analytics on a Discovery Accelerator case

At any time, you can enable more than one case for analytics. Due to the large amount of data collection and analysis that is required for multiple cases, it can take a very long time to process all the enabled cases. You can pause analytics on a case-by-case basis if you want to speed up the collection of data on higher priority cases. Later, you can resume analytics on these cases.

You must have the Manage Analytics permission to pause and resume analytics.

To pause and resume analytics on a Discovery Accelerator case

- 1 Click the **Cases** tab in the Discovery Accelerator client.
- 2 In the **Cases** pane at the left, select the case that you want to pause or resume.
- 3 Click the **Analytics** tab.
- 4 Click **Pause** or **Resume** at the top of the tab, depending on what you want to do.

Speeding up analytics data collection in low-bandwidth environments

When there are low-bandwidth connections (1GB or lower) between Discovery Accelerator and Enterprise Vault, and between Discovery Accelerator and SQL Server, the collection of analytics data can be slow due to high memory usage and service restarts. If you know these connections to be slow, or if you experience these symptoms, you can take the following steps to speed up data collection.

To speed up analytics data collection in low-bandwidth environments

- 1 Pause the collection of analytics data.
- 2 Locate the `AnalyticsIngesterTask.exe.config` file in the Discovery Accelerator program folder.
- 3 Open the file in a text editor such as Windows Notepad.
- 4 Make the following configuration changes:

```
<add key="numECMThreads" value="1" />
<add key="maxThreadsPerVaultServer" value="1" />
<add key="numDBThreads" value="2" />
```

- 5 Save and close the file.
- 6 Resume the collection of analytics data.

Disabling analytics on a Discovery Accelerator case

After you disable analytics on a case, the marks and tags remain on the current items. However, any new items are not automatically categorized.

You must have the Manage Analytics permission to disable analytics.

To disable analytics on a Discovery Accelerator case

- 1 Click the **Cases** tab in the Discovery Accelerator client.
- 2 In the **Cases** pane at the left, select the case on which you want to disable analytics.
- 3 Click the **Analytics** tab.
- 4 Click **Disable**.

Deleting Discovery Accelerator cases

When you have no further use for a case, you may be able to delete it and all its associated objects. These objects include case-specific searches, research folders,

and targets and target groups. If analytics is enabled on a case when you delete it, all the information that relates to analytics on the case is also deleted.

You must have the appropriate permissions to delete a case. Users with the application-wide Delete Case permission can delete any case in the system. Users with the equivalent case-specific permission can delete cases in which they have this permission.

To delete a Discovery Accelerator case

- 1** Click the **Cases** tab in the Discovery Accelerator client.
- 2** In the left pane, click **All Cases**.
- 3** Click one or more cases that you want to delete.

You can select multiple adjacent cases by holding down the Shift key while clicking the first and last case in the range. To select multiple nonadjacent cases, hold down the Ctrl key while clicking the required cases. To select all the cases, press Ctrl+A.

- 4** Click **Delete**.
- 5** Click **Delete Cases** to confirm that you want to proceed.

Setting up review marks and tags

This chapter includes the following topics:

- [About review marks](#)
- [Creating review marks](#)
- [How retained marks work](#)
- [Editing review marks](#)
- [Customizing the review marks that are associated with individual cases](#)
- [Creating tags](#)
- [Creating tag groups](#)

About review marks

When they check items, reviewers apply a mark to each item to indicate whether it is relevant to the case. In a standard Discovery Accelerator installation, the predefined marks are Relevant, Not Relevant, and Flagged, but you can modify these marks and add new ones. You can also choose whether the items that are marked in one case retain their marks when they appear in other cases.

Each mark has a status that is associated with it, such as Questioned or Reviewed. When you perform an export or production run, you can filter the items by their mark or status, or by the name of the reviewer who marked them. For example, you can choose to export only those items that reviewers have marked as Relevant.

[Table 5-1](#) shows the statuses that Discovery Accelerator associates with the default review marks.

Table 5-1 Default review marks and their associated statuses

| Mark | Associated status |
|--------------|-------------------|
| Relevant | Reviewed |
| Not Relevant | Reviewed |
| Flagged | Questioned |

The three available statuses (Pending, Questioned and Reviewed) are built into Discovery Accelerator, and you cannot modify them. Nor can you create new statuses.

Creating review marks

If the predefined review marks do not precisely meet your needs, you can create new ones. The predefined marks and any custom marks that you create comprise the global set of review marks. This global set is available for use with all cases, but you can choose whether to use each mark on a case-by-case basis.

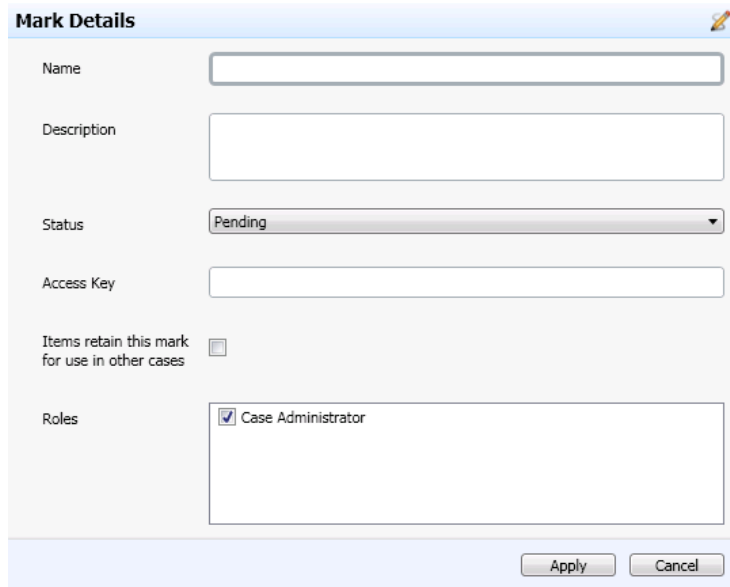
Caution: Be careful when creating new marks, as you cannot delete them after you have created them.

You must have the Manage Marks permission to create marks. By default, only users with the role of Discovery System Admin have this permission.

To create a review mark

- 1 Click the **Application** tab in the Discovery Accelerator client, and then click the **Marks** tab.
- 2 Click **New**, and then click **Mark**. Alternatively, select an existing mark and then click **Copy** to create a new mark that is based on the properties of the old one.

The Mark Details pane appears.



The image shows a 'Mark Details' dialog box with a light blue header and a light gray body. It contains several input fields and a list box. At the bottom right are 'Apply' and 'Cancel' buttons.

| Mark Details | |
|---|---|
| Name | <input type="text"/> |
| Description | <input type="text"/> |
| Status | <input type="text" value="Pending"/> |
| Access Key | <input type="text"/> |
| Items retain this mark for use in other cases | <input type="checkbox"/> |
| Roles | <div><input checked="" type="checkbox"/> Case Administrator</div> |

- 3 Type a name for the new mark and a description, if required.

The mark names appear as button labels at the bottom right of the Review pane, so it is advisable to keep them short. Discovery Accelerator displays the descriptions as tool tips when you hover the mouse pointer over the mark buttons.
- 4 In the **Status** box, choose a status to associate with the mark.

All marks must be associated with a status, such as Questioned or Reviewed. You use the status to group items and so determine what is included in the production set.
- 5 In the **Access Key** box, type a shortcut key combination to associate with the mark.

When reviewers press an access key combination, they can assign a specific mark to an item in the Review pane.
- 6 In the **Roles** box, select the default user roles with which to associate the review mark. Users who occupy these roles can apply this mark to the items that they review.

Later, you can refine the list of associated roles when you customize the marks that are associated with an individual case.
- 7 If you want the mark to work across multiple cases, check **Items retain this mark for use in other cases**. When you select this option, the marks that you

apply to an item in one case are also visible in other cases. You might typically select this option for common, universal marks, such as one to denote junk mail.

Note that items do not retain their marks across multiple Discovery Accelerator customer databases.

- 8 Click **Apply**.

How retained marks work

Discovery Accelerator keeps a master collection of all items that have ever been accepted into any case. When a reviewer marks an item then, depending on how you defined that mark, the mark may apply just to the case or it may apply to the case and also be copied to the master collection so that it can be used in other cases.

For example, you may want a mark that is called Spam to stay with items in the master collection. If another search ever finds these items, they are already marked Spam and may not need to be reviewed again.

When you perform a new search and accept the results, Discovery Accelerator does the following for each item that you accept:

- If the item has not been accepted before, Discovery Accelerator adds the item to the master collection and creates a link from the case to it.
- If the item has been accepted before, Discovery Accelerator creates a link from the case to the item in the master collection. It also checks for existing marks. If you choose to keep the existing marks when you accept the search results, Discovery Accelerator adds existing retained marks to the case. If you do not choose to keep the existing marks, Discovery Accelerator removes them from the items in the case. However, it does not remove the existing marks from the items in the master collection.

When a reviewer adds to an item a mark that has the property "Items retain this mark for use in other cases", that mark stays with the item in the master collection so that it can be used in future cases. If the mark does not have this property, the mark applies within the case but is not available to other cases.

Editing review marks

You can rename existing marks and change their descriptions, access keys, and associated roles and statuses.

You must have the Manage Marks permission to edit marks. By default, only users with the role of Discovery System Admin have this permission.

To edit a review mark

- 1 Click the **Application** tab in the Discovery Accelerator client, and then click the **Marks** tab.
- 2 In the left pane, click the name of the mark that you want to edit.
- 3 Enter the new details in the right pane.
- 4 Click **Apply**.

Customizing the review marks that are associated with individual cases

By default, all the marks in your global set of review marks are associated with every case. However, you can select the marks that are available for use in each case. You can also change the user roles that you have associated with each mark.

You must have the Manage Marks/Tags permission to customize the review marks that are associated with a case.

To customize the review marks that are associated with an individual case

- 1 Click the **Cases** tab in the Discovery Accelerator client.
- 2 In the left pane, select the case for which you want to customize the review marks.

If Discovery Accelerator lists a lot of cases, you can filter the list with the fields at the top of the pane. As well as filtering the cases by name, you can choose whether to list any research folders that are associated with them.
- 3 Click the **Marks** tab.
- 4 Do one or more of the following:
 - To associate a new review mark with the case, click **Add** and then select the required mark in the **Application Mark** box at the right.
 - To change the user roles with which you have associated a review mark, click the mark name in the center pane. Then amend the details in the **Roles** box.
 - To dissociate a review mark from a case, click the mark name in the center pane and then click **Remove**.
- 5 Click **Apply**.

Creating tags

You can also set up a secondary set of marks, called *tags*, which reviewers can assign to the items in a review set. In earlier versions of Discovery Accelerator, tags were called *extra marks*.

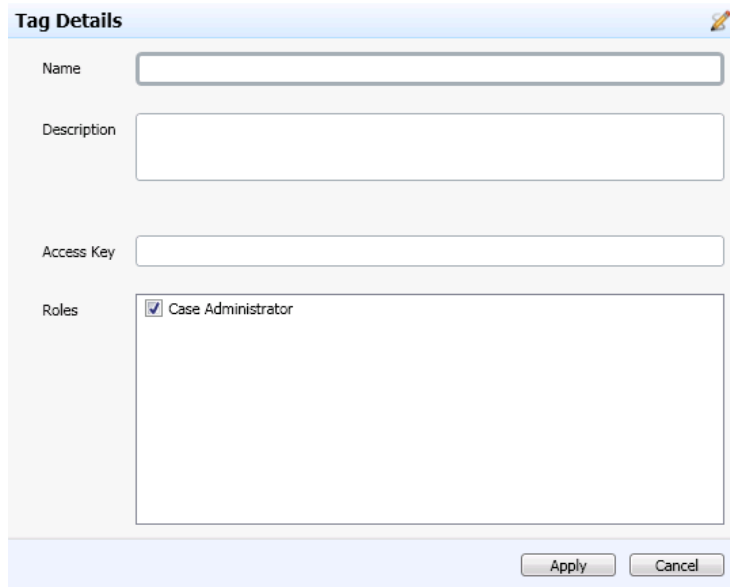
Tags differ from marks in that reviewers can assign multiple tags to an item, but they can assign one mark only. In addition, a reviewer who assigns a mark to an item also assigns the associated status to it. This is not the case with tags, which do not have an associated status.

You must have the application permission Manage Marks to create tags that are available for use in all cases. However, you require the permission Manage Marks/Tags in a case to create a tag that is available for use in that case only.

To create a tag

- 1 Do one of the following:
 - To create a tag that is available for use in all cases, click the **Application** tab in the Discovery Accelerator client, and then click the **Tags** tab.
 - To create a tag that is available for use in one case only, click the **Cases** tab and then click the required case in the left pane. Then click the **Tags** tab.
- 2 Click **New Tag**. Alternatively, select an existing tag and then click **Copy** to create a new tag that is based on the properties of the old one.

The Tag Details pane appears.



Tag Details

Name

Description

Access Key

Roles ☒ Case Administrator

- 3 Type a name for the new tag and a description, if required.

The tag names appear as options in a pop-up window at the bottom of the Review pane. Therefore, it is advisable to keep them short. Discovery Accelerator displays the descriptions as tool tips when you hover the mouse pointer over the tag labels.

- 4 In the **Access Key** box, type a shortcut key combination to associate with the tag.

When reviewers press an access key combination, they can assign a specific tag to an item in the Review pane.

- 5 In the **Roles** box, select the default user roles with which to associate the tag. Users who occupy these roles can apply this tag to the items that they review.

- 6 Click **Apply**.

Creating tag groups

You can group related tags into groups and present them in a list from which reviewers can choose as they mark items. This facility is optional, but it offers a number of benefits:

- The number of tags that you can create is unlimited, and in theory reviewers can have a hundred or more tags from which to choose. Grouping related tags

imposes some structure and makes display and selection less of an issue for the reviewer.

- Tag groups provide an indication of the use of the tags. For example, by grouping key tags into a group that is called "Important Tags for Matter x", you offer a clue about the function of the tags.
- You can use a tag group to present reviewers with a question, such as "Which customer does this item apply to?", and then have them answer the question by choosing between suitably labeled tags.

Two types of tag groups are available: single-choice groups and multiple-choice groups.

Creating a single-choice tag group

Reviewers can select one tag only from a single-choice group. For example, you might use a single-choice group to ask the question "Is this item external email or internal email?". As an item cannot be both, you might invite reviewers to choose between the two options by providing tags that are labeled "Internal" and "External".

A single-choice group contains the new tags that you define when you create the group. Unlike multiple-choice tag groups, you cannot assemble a single-choice tag group from the existing tags in a case.

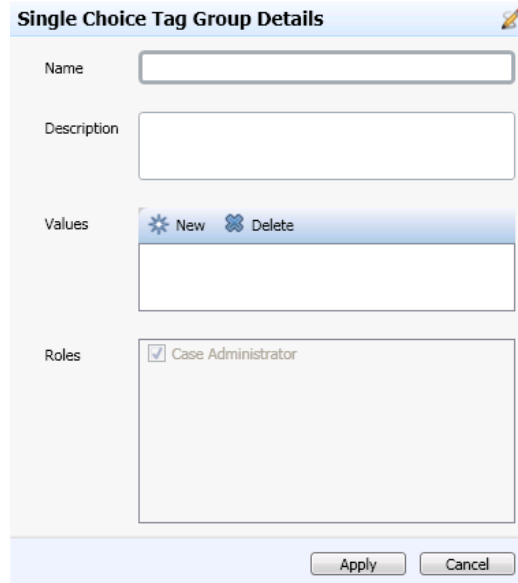
You must have the Manage Marks/Tags permission in a case to create single-choice tag groups.

To create a single-choice tag group

- 1 Click the **Cases** tab in the Discovery Accelerator client.
- 2 Click the required case in the left pane.
- 3 Click the **Tags** tab.

4 Click **New Single Choice Tag Group**.

The Single Choice Tag Group Details pane appears.



The image shows a software interface titled "Single Choice Tag Group Details". It contains several input fields and buttons. At the top, there is a "Name" field. Below it is a "Description" field. Under the "Description" field is a "Values" section, which includes a blue bar with "New" and "Delete" buttons (each with a plus icon) and a text input field below it. At the bottom of the main content area is a "Roles" section, which has a list box containing a checked item "Case Administrator". At the very bottom of the pane are "Apply" and "Cancel" buttons.

5 Type a name for the new tag group and a description, if required.

6 In the **Values** box, click **New** and then type the name of the first tag to include in the group.

7 Add more tags until the list is complete.

8 In the **Roles** box, select the default user roles with which to associate the tag group. Users who occupy these roles can apply a tag to the items that they review.

9 Click **Apply**.

Creating a multiple-choice tag group

Reviewers can select some or all of the tags in a multiple-choice group. For example, you might use a multiple-choice group to ask the question "What part of the car is the item pertaining to?". This type of question can have multiple answers, and in this case you might provide tags that are labeled "Brakes", "Tires", "Windshield", and so on.

You assemble a multiple-choice group from the existing tags in a case.

You must have the Manage Marks/Tags permission in a case to create multiple-choice tag groups.

To create a multiple-choice tag group

- 1 Click the **Cases** tab in the Discovery Accelerator client.
- 2 Click the required case in the left pane.
- 3 Click the **Tags** tab.
- 4 Ensure that all the tags that you want to include in the group are listed in the center pane.

To create new tags, click **New Tag** and then enter the details of the new tag. If you previously created an application-level tag and want to add it to the case, click **Add** and then select the required tag.

- 5 Click **New Tag Group**.

The Tag Group Details pane appears.

Tag Group Details

Name:

Description:

Tags:

- ☒ Katy Toys
- ☒ Myco
- ☒ EBO Toys

- 6 Type a name for the new tag group and a description, if required.
- 7 In the **Tags** box, check the tags that you want to include in the group.
- 8 Click **Apply**.

Using rules to mark and tag items automatically

This chapter includes the following topics:

- [About analytics rules](#)
- [Creating analytics rules](#)
- [Overriding manual categorization](#)
- [Editing analytics rules](#)
- [Changing the priority levels of marking rules](#)
- [About tagging rules](#)
- [Manually editing queries in analytics rule definition language \(RDL\)](#)
- [Deleting analytics rules](#)

About analytics rules

Within each case, you can create analytics rules to identify the items that match your search criteria. You can also configure these rules to apply marks and tags automatically to the matched items. This lets you automatically categorize the items that match your criteria, before you manually review them in the Review pane.

All the indexed mail attributes and the content of each message are searchable in the analytics rules that you create. For example, you can automatically classify all the messages that are based on attributes such as the name of the sender, or words that are present in the subject lines of the messages. Each case can have many rules, and each rule can have multiple conditions.

Similarly, when you delete or disable a rule, new processing begins and removes marks and tags from the items that the rules previously categorized.

Note the following:

- You must have the Manage Automatic Categorization permission to build and manage analytics rules.
- You must ensure that the SQL Server Agent service is running if you want to use analytics rules to mark or tag items automatically.
- Installing SQL Server 2008 can have an effect on the analytics facilities in Discovery Accelerator.
See [“Issues with analytics facilities after you install SQL Server 2008”](#) on page 227.

Creating analytics rules

If you know the search criteria that you want to use, you can define rules for a case before you enable it for analytics. Then, when you enable analytics, data collection and indexing begins and rule actions are applied in parallel to mark and tag the matching items. You can also create and edit rules after you have enabled a case for analytics. In this instance, the new rules start marking and tagging matching items immediately.

To create an analytics rule

- 1 Click the **Cases** tab in the Discovery Accelerator client.
- 2 In the **Cases** pane at the left, select the case for which you want to create the rule.
- 3 Click the **Rule Builder** tab.
- 4 Click **New** at the top of the tab. Alternatively, to create a rule that is based on an existing rule, click the rule in the **Marking rules** area or **Tagging rules** area and then click **Copy**.

The Rule details pane appears.

Rule details

Rule name: ☒ Rule enabled

Rule description:

Rule conditions

-Select attribute-

Rule query Edit Query

Rule condition settings

Search custodians by:

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

Rule actions

☐ Mark item as

☐ Tag item as

Rule priority as

Apply Cancel

- 5 Type a name and description for the rule.
- 6 Check **Rule enabled** unless you want to disable the rule until a future time.
- 7 In the **Rule conditions** area, define one or more conditions that an item must meet to match the rule. Every rule must have at least one condition.

To define the conditions, proceed as follows:

- In the **Select attribute** drop-down list, choose an attribute of the items for which to search. For example, choose Subject if you want to search the subject lines of items.
See [“About the search attributes”](#) on page 61.
- In the next drop-down list, choose an operator to apply to the selected attribute. For example, if you have set the attribute to Subject, you can choose the Contains operator to search for those items whose subject lines contain certain words.
See [“About the operators”](#) on page 71.
- Set the required value for the attribute. For example, when the attribute is Subject and the operator is Contains, you can type **Symantec** to search for those items whose subject lines contain this word. Note the following:

- The search string cannot contain any punctuation characters other than the underscore character.
- You can append an asterisk (*) as a wildcard character to the end of the search string.
- SQL Server does not index commonly occurring words such as "the" and "and", so Discovery Accelerator ignores these words when it encounters them in a search string. You can override this behavior by editing the SQL Server noise word file.
 See [“About SQL Server noise words”](#) on page 74.

- If you set the attribute to Subject, Content, or Subject or Content, choose whether to turn search stemming on or off.
 Stemming lets you match the words that derive from the word that you specify. For example, the word "run" matches "running" and "ran". You cannot use wildcard characters in conditions that use stemming.
- Click the + button to save the condition and add another one, if required. You define the relationship between two conditions with the **And/Or** buttons. **And** denotes that an item must match both conditions, whereas **Or** denotes that the item can match one condition but not the other.

- If you want to remove a condition, click the - button at the right of its row.
 As you add conditions, they appear in the **Rule query** area. When you become familiar with the query language, you can construct more complex queries by editing the syntax manually.

See [“Manually editing queries in analytics rule definition language \(RDL\)”](#) on page 77.

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

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

The conditions that you enter in the **Rule conditions settings** area use the custodian information that is available at the time that you build the rule. This information is not updated unless you edit the rule again. For example, when you create a rule and select the option **Expand distribution list to**

include members, the list members at that time are saved with the rule. If the membership of the list changes later, these changes are not applied to the rule until you edit and save it again.

- 9 In the **Rule actions** area, choose how to mark or tag the items that match the rule conditions. The options are as follows:

Mark item as Applies the selected mark to items that match the rule. If this rule is one of several rules that apply marks, you can set its priority level with the **Rule priority as** box. The lower the number, the higher the priority level.

See [“Changing the priority levels of marking rules”](#) on page 76.

Tag item as Applies the selected tags to items that match the rule. If necessary, expand the tag groups to see the associated tags.

- 10 Click **Apply**.

About the search attributes

[Table 6-1](#) lists all the available attributes. For each attribute, the table shows the operators that you can use with the attribute, and describes its purpose.

Table 6-1 Search attributes

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

Table 6-1 Search attributes (*continued*)

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

Table 6-1 Search attributes (*continued*)

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

Table 6-1 Search attributes (continued)

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

Table 6-1 Search attributes (*continued*)

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

Table 6-1 Search attributes (*continued*)

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

Table 6-1 Search attributes (*continued*)

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

Table 6-1 Search attributes (*continued*)

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

Table 6-1 Search attributes (*continued*)

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

Table 6-1 Search attributes (continued)

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

Table 6-1 Search attributes (*continued*)

| Attribute | Type | Accepted operators | Description |
|-----------|--------|--|---|
| To | String | CONTAINS ANYOF ALLOF NOT CONTAINS NOT ALLOF NOT ANYOF | Use To to add a condition that is based on the email's recipients. Enclose full names in double quotation marks (""). You can also type first names, last names, or middle names individually. 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. Identify custodians by their primary attribute values, and custodian groups, targets, and target groups by their display names. |

About the operators

The operators fall into the following categories:

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

[Table 6-2](#) lists all the single-value operators that are available.

Table 6-2 Single-value operators

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

Table 6-2 Single-value operators (continued)

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

Table 6-3 lists all the multiple-value operators that are available.

Table 6-3 Multiple-value operators

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

Table 6-3 Multiple-value operators (*continued*)

| Operator | Description |
|----------------------|---|
| BETWEEN, NOT BETWEEN | <p>Use for dates. For example:</p> <p>MailDate BETWEEN "01/05/2010", "31/05/2010"</p> <p>You must place the earlier date before the later date.</p> |
| NEAR | <p>Use for strings.</p> <p>Searches match items where the words that you specify are within 50 words of each other. For example:</p> <p>Content NEAR 'contract money'</p> <p>This search matches items where the words "contract" and "money" are fewer than 50 words apart in the body text.</p> <p>See “Guidelines on using the NEAR operator condition in Discovery Accelerator rules” on page 73.</p> |

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

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

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

Guidelines on using the NEAR operator condition in Discovery Accelerator rules

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

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

```
Subject contains 'Symantec'  
AND  
Content Near 'Symantec Investment'  
AND
```

```
MailDate = '17/03/2010'  
OR  
Importance = 'Normal'
```

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

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

About SQL Server noise words

To prevent a full-text index from becoming bloated, SQL Server has a mechanism that discards commonly occurring words such as "the" and "and". These discarded words are called *noise words* in SQL Server 2005 and *stopwords* in SQL Server 2008. During index creation, the SQL full-text engine omits noise words from the full-text index, and consequently you cannot search for them by using Discovery Accelerator. For example, a search for the phrase "the lazy dog" returns results where the phrase "one lazy dog" matches.

You can override this behavior by editing the SQL Server noise word file. If you use SQL Server 2005, the following article in the Microsoft Knowledge Base describes how to edit the file:

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

If you use SQL Server 2008, the following article provides information on stopwords and stoplists:

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

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

Overriding manual categorization

By default, analytics rules do not categorize the items that the rule conditions match if the items have already been marked or tagged manually in the Review pane. You can use the override this behavior, however, and allow the rule engine to categorize all items that match the conditions.

Note: Use the override manual categorization feature with caution. You should use it only to override incorrect marks and tags that reviewers have applied manually. With this option enabled, you must also wait until automatic categorization is complete before you manually mark or tag any items on the case.

To override manual categorization

- 1 Click the **Cases** tab in the Discovery Accelerator client.
- 2 In the **Cases** pane at the left, select the case for which you want to override manual categorization.
- 3 Click the **Rule Builder** tab.
- 4 Click **Override Manual Categorization** near the top of the tab.

This feature remains in operation until the rule engine has completed its run based on all the current rules. When it has completed its processing, the override manual categorization feature is automatically turned off again.

Editing analytics rules

You can edit an existing rule to change its search criteria or disable it temporarily.

To edit an analytics rule

- 1 Click the **Cases** tab in the Discovery Accelerator client.
- 2 In the **Cases** pane at the left, select the case in which you want to edit the rule.
- 3 Click the **Rule Builder** tab.
- 4 In the **Marking rules** area or **Tagging rules** area, click the rule that you want to edit.
- 5 Make the required changes to the rule. For example, if you want to disable the rule temporarily, uncheck **Rule enabled** in the **Rule details** area.
- 6 Click **Apply**.

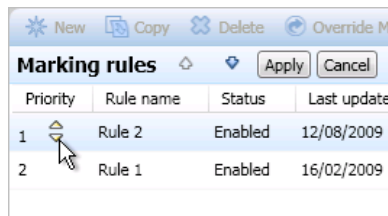
Changing the priority levels of marking rules

Each marking rule has a priority level, which you assign when you create it. When the rule with the highest priority marks an item, no rule with a lower priority can mark the same item. Even if the conditions on the rule with the lower priority value would match the item, it is excluded from automatic categorization under this rule.

Rules that you have configured to apply both marks and tags to items also have a priority level. After a rule that applies both marks and tags has automatically categorized items, lower priority rules cannot categorize the items.

To change the priority level of a marking rule

- 1 Click the **Cases** tab in the Discovery Accelerator client.
- 2 In the **Cases** pane at the left, select the case in which you want to change the priority level of a rule.
- 3 Click the **Rule Builder** tab.
- 4 In the **Marking rules** area, select the rule whose priority you want to change.



- 5 Click the up or down arrow next to the rule until it has the correct priority.
- 6 Click **Apply**.

About tagging rules

Tagging rules behave differently from marking rules. Tagging rules do not have a priority level, and any number of tagging rules can match one item. However, when a tagging rule applies a tag from a single-choice tag group, no other rule can then apply a tag from the same group.

When you disable a tagging rule that has applied tags from single-choice tag groups, the rule engine removes the tags, and may apply tags from single-choice groups configured in other rules. If you turn on the first tagging rule again, it is possible for the rule engine to produce different results from those that existed before you disabled the rule.

For example, suppose that you have the following tag groups:

- Single-choice group called SS1 contains tags called TagA and TagB.
- Single-choice group called SS2 contains tags called TagY and TagZ.

Two tagging rules are configured to apply tags from these single-choice groups:

- Rule1 applies TagA and TagY.
- Rule2 applies TagB and TagZ.

There are 100 items that match the criteria of both rules. In this case, the rule engine processes Rule1 and applies TagA and TagY to the 100 items. Although the items also match the criteria in Rule2, the rule engine does not apply TagB and TagZ to the 100 items because they are already tagged by other tags from both the single-choice tag groups.

If you disable Rule1, the rule engine first removes TagA and TagY from the items, and then applies TagB and TagZ under Rule2. If you turn on Rule1 again, TagB and TagZ remain on the 100 items. The rule engine cannot now apply TagA and TagY because the 100 items are already tagged by other tags from both the single-choice tag groups.

Manually editing queries in analytics rule definition language (RDL)

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

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

Using parentheses to set Boolean precedence in analytics RDL

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

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

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

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

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

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

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

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

Using stemming in analytics RDL

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

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

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

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

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

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

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

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

Specifying custodian and target values in analytics RDL

[Table 6-4](#) shows the format in which you must specify any custodian values or target values in a manually-edited analytics rule.

Table 6-4 How to specify custodian values and target values in analytics RDL

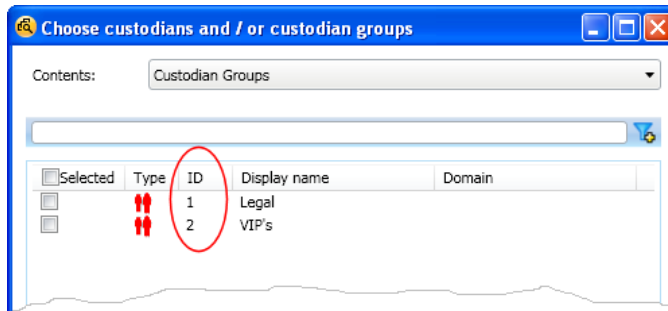
| Item | What to type | Example |
|-----------------|-------------------------------------|------------------------|
| Custodian | <i>C:ID:primary_attribute_value</i> | C:11:E12345 |
| Custodian group | <i>CG:ID:display_name</i> | CG:3:Employees-ALL |
| Target | <i>T:ID:display_name</i> | T:4:Jane Smith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

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

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

After you click **Edit Query** in the **Rule query** area of the **Rule Builder** tab, a **Launch Target Picker** button appears at the right of the area. Click this button to select and enter the required custodian value or target value in the correct format. Alternatively, you can use this method to obtain the required ID value of the custodian or target, as [Figure 6-1](#) shows.

Figure 6-1 Using the Target Picker to obtain the ID value of a custodian or target



Deleting analytics rules

If you want to stop a rule from processing, you can delete it.

To delete an analytics rule

- 1 Click the **Cases** tab in the Discovery Accelerator client.
- 2 In the **Cases** pane at the left, select the case from which you want to delete the rule.
- 3 Click the **Rule Builder** tab.
- 4 In the **Marking rules** area or **Tagging rules** area, click the rule that you want to delete.
- 5 Click **Delete**.
- 6 Click **OK** to confirm that you want to delete the rule.

Using Custodian Manager

This chapter includes the following topics:

- [About Custodian Manager](#)
- [Guidelines on using Custodian Manager](#)
- [Setting up custodians](#)
- [Setting up custodian groups](#)
- [Setting up custom custodian attributes](#)
- [Setting the primary custodian attribute](#)
- [Specifying the user account under which to synchronize custodians](#)
- [Synchronizing with entire Active Directory domains and Domino servers](#)
- [Setting the configuration options for Custodian Manager](#)

About Custodian Manager

Custodian Manager lets you submit the details of custodians and custodian groups for which you want to search when you conduct a Discovery Accelerator search. A custodian is an individual employee, whereas a custodian group is any collection of employees. Some examples of possible custodian groups are NT groups, distribution lists, Active Directory containers, Domino LDAP queries, and Domino groups.

After you have submitted a few details of a custodian or group in Custodian Manager, you can synchronize them with an external source like Active Directory or a Domino LDAP directory. This process keeps the data in Custodian Manager up-to-date and lets you retrieve additional information about the custodian or group from the external source.

Custodian Manager also lets you assign additional, custom attributes to custodians and custodian groups. Use these attributes to filter the list of custodians and groups for which to search in Discovery Accelerator. For example, you can create a custom attribute called "Cost Center 1", assign it to the custodians who belong to the cost center, and then pick the attribute when you define your search targets with Discovery Accelerator.

Note: If the data that you want to add to Custodian Manager already exists and is convertible to XML format, you can import it into Discovery Accelerator from an XML file.

See [“About importing configuration data”](#) on page 209.

To start Custodian Manager from the Windows desktop

- 1 Open Internet Explorer.
- 2 Browse to the following location:
`http://server_name/EVBACustodianManager`
where *server_name* is the name of the server on which you installed the Discovery Accelerator server software.

To start Custodian Manager from the Discovery Accelerator client

- 1 Click the **Custodians** tab in the Discovery Accelerator client, and then click the **Custodian Manager** tab.
- 2 Click the **Click here to open Custodian Manager web site** hyperlink.

Guidelines on using Custodian Manager

For the best results when running Custodian Manager, note the following:

- Use the hyperlinks to navigate from page to page rather than shortcut keys or the buttons in the browser toolbar. In particular, click the **OK** and **Close** buttons at the bottom of most pages to close a page and return to the previous page. Do not press the Backspace key or click the **Back** button in the toolbar.
- Click the **Symantec Enterprise Vault Custodian Manager** banner at the top of any page to return to the home page.
- In most cases, you can reload the current page by right-clicking it and then selecting **Refresh**. Clicking the **Refresh** button in the browser toolbar displays the home page of Custodian Manager.

- If Custodian Manager finds an error when it validates the information that you have entered in a page, it displays an exclamation point. To view information on the error, hover the mouse pointer over the exclamation point.

Setting up custodians

You can enter a few custodian details and then populate the rest by synchronizing with the corresponding Active Directory or Domino LDAP directory account.

To set up a custodian

- 1 In the Custodian Manager home page, click **Custodians**.
- 2 In the Custodian Management page, click **New Custodian**.
- 3 In the Create Custodian page, type the employee's name and the corresponding display name.
- 4 In the **Organization** section, type the company details for the employee. Complete the boxes as follows:

| | |
|------------------------------|---|
| Title | Specifies the custodian's job title. |
| Department | Identifies the custodian's department within the company. |
| Start Date | Your company policy should specify how this box is used. For example, the start date can indicate when the employee joined the company. |
| End Date | As with the start date, your company policy should specify how this box is used. For example, the end date can indicate when the employee left the company. This date is important for preserving accurate system information. |
| Employee ID | If your company's administration or finance department issues each employee with a unique company ID, you can enter it here. |
| Username and Domino Username | These names are mandatory if you want to synchronize information with either Active Directory or a Domino LDAP directory. Enter the name in the form <i>domain\login_name</i> , or click Browse to display a list of accounts and then select the one for this employee. Both names are optional but, if you want to associate a Windows account with a Domino account, you must set both. |

- 5 If you have set up any custom attribute values to assign to your custodians, add them in the **Custom Attributes** area.

Click **Add** to select from a list of predefined attribute values or, for attributes that accept free text values, type the value in the box. You can remove an existing value from an attribute by clicking **Remove**.
- 6 In the **Automatically Synchronize Properties** section, specify whether regularly to update the custodian details with values in the associated Windows or Domino user account. This section is unavailable until you enter a user name in the **Organization** section.

By default, Discovery Accelerator synchronizes custodians and groups every eight hours and every time the Discovery Accelerator service starts. To change this schedule, click **Settings** in the Custodian Manager home page, select **Profile Synchronization** in the drop-down list, and then set the required synchronization interval.
- 7 In the **Email Display Name Addresses** section, list the display names that are currently associated with the custodian's email addresses.
- 8 In the **Email Addresses** section, type all the email addresses associated with the custodian—one address per line. If you search for the items that were sent to or from this custodian, Discovery Accelerator includes all the listed addresses in the search. To ensure that you capture all the relevant items, remember to add old email addresses.
- 9 Click **OK**.

Setting up custodian groups

As well as setting up custodians, you can set up custodian groups and synchronize them with a variety of source groups, including the following:

- Windows and Domino groups and distribution lists
- Active Directory and Domino LDAP searches
- Active Directory containers

Using custodian groups helps to simplify the management of custodians. By synchronizing a custodian group with a Windows or Domino user group, you can set up multiple custodians automatically.

If you want to synchronize the custodian group with a Domino group or distribution list, enable the following Domino LDAP attributes for anonymous access in Lotus Domino Administrator:

- cn

- dominocertificate
- mail
- maildomain
- member
- objectclass

See the Lotus Domino documentation for instructions on how to enable the attributes for anonymous access.

To set up a custodian group

- 1 In the Custodian Manager home page, click **Custodian Groups**.
- 2 In the Custodian Groups Management page, click **New Custodian Group**.
- 3 Complete the fields in the Create Group page, and then click **OK**.

Setting up custom custodian attributes

Custodian Manager automatically synchronizes a number of standard custodian attributes with the corresponding values in an external source like Active Directory. These standard attributes include the custodian's first and last names, department, and start and end dates. If you want to synchronize any additional attributes, you can define custom attributes and map them to the corresponding attributes in the external source.

Note: If Custodian Manager uses the Global Catalog when it synchronizes with Active Directory, any custom attribute that you set up in Active Directory must replicate to the Global Catalog. Otherwise, Custodian Manager cannot retrieve the associated attribute values during synchronization. To add an attribute to the Global Catalog, display the properties of the attribute in the Active Directory Schema snap-in, and then check **Replicate this attribute to the Global Catalog**.

To set up a custom custodian attribute

- 1 In the Custodian Manager home page, click **Custodian Attributes**.
- 2 In the Custodian Attributes page, click **New Custodian Attribute**.
- 3 In the Custom Custodian Attribute page, type the name and an optional description for the attribute.

- 4 If you want to make the attribute visible when you add or edit the details of a custodian, check **Display this attribute on the custodian details page**. If you do not mark an attribute as visible then it does not appear on these pages, and you cannot assign it to your custodians.
- 5 Check **Set as primary attribute** if you want to make this attribute the primary attribute with which to identify custodians in the Discovery Accelerator client. When client users define the criteria for a search or analytics rule, they can nominate custodians for whom to search by specifying the primary attribute values.

Every custodian must have a value for the primary attribute, and every value must be unique.

- 6 In the **Synchronize** box, specify the details of the attribute in Active Directory or a Domino LDAP directory with which to synchronize the new attribute.
- 7 If you chose to synchronize the attribute with attributes in both Active Directory and a Domino LDAP directory, select which of the two sources has priority.
- 8 If you want to enter a free-text value for the attribute instead of choosing from a list of supplied values, check **Allow free text values to be entered**.
- 9 To add or modify the values from which to choose when setting the attribute in the custodian properties pages, do the following:
 - To add a new value, click **New Value** and then type the required name and description.
 - To list any existing attribute values, type the name or partial name of the value in the **Find** box. You can also click **Download All Attribute Values** to make a comma-separated value (CSV) file that lists the values.
 - To edit an existing value, click **Edit** at the right of the row and then make the required changes. Custodian Manager automatically updates the properties of any custodian to which you assigned the value.
 - To delete an existing value, click **Delete** at the right of the row. Custodian Manager automatically removes the value from the properties of any custodian to which you assigned it.

- 10 Click **OK**.

Setting the primary custodian attribute

When Discovery Accelerator client users define the criteria for a search or analytics rule, they can nominate the custodians for whom to search by specifying the primary attribute values. For example, the default primary attribute is Display

Name, so a user who creates a search nominates the target custodians by specifying their Display Names. Every custodian must have a value for the primary attribute, and every value must be unique.

If you prefer to search for custodians by an attribute other than Display Name, you can set a different attribute as the primary. Note that the Display Name and Employee ID attributes are the only standard custodian attributes that you can set as the primary attribute. However, you can set any custom attribute as the primary attribute.

To set the primary custodian attribute

- 1 In the Custodian Manager home page, click **Custodian Attributes**.
- 2 In the Custodian Attributes page, click the name of the attribute that you want to set as the primary attribute.
- 3 In the Custodian Attribute page, check **Set as primary attribute**.
- 4 Click **OK** to confirm that you want to set the new attribute as the primary attribute.
- 5 Click **OK** to save the change that you have made and go back to the Custodian Attributes page.
- 6 Restart the Enterprise Vault Accelerator Manager service on all Discovery Accelerator servers.
- 7 Instruct all Discovery Accelerator client users to restart the client software.

Specifying the user account under which to synchronize custodians

By default, Custodian Manager uses the account under which the Accelerator Manager service is running when it synchronizes custodians and custodian groups with the corresponding Active Directory accounts. If you prefer, you can nominate a different account on a per-domain basis.

The nominated synchronization account must have certain permissions in Active Directory. For guidelines on how to assign these permissions, see the *Installation Guide*.

To specify the user account under which to synchronize custodians

- 1 In the Custodian Manager home page, click **Synchronization Accounts**.
- 2 In the Synchronization Accounts page, click **New Account**.
- 3 In the Synchronization Account page, type the NetBIOS name of the Active Directory domain with which you want to synchronize.

- 4 Specify the user account under which to perform Active Directory access for the domain.

The nominated user account must have certain permissions to query the Active Directory domain. Click **Check Account** to verify that the nominated user account has the required permissions.
- 5 Specify the required Global Catalog server, if you want to force Custodian Manager to use a specific server instead of attempting to find the Global Catalog automatically.
- 6 Enter any DNS fully qualified domain names that you want to map to the NetBIOS name.
- 7 Click **OK**.

Synchronizing with entire Active Directory domains and Domino servers

You can instruct Custodian Manager to create custodians and custodian groups automatically for every user and group that it finds.

To synchronize Custodian Manager with an Active Directory domain or Domino server

- 1 In the Custodian Manager home page, click **Directory Synchronization**.
- 2 In the Directory Synchronization page, click **New Directory Synchronization**.
- 3 Choose whether to synchronize Custodian Manager with an Active Directory domain or Domino server. Then type the name of the required domain or server.
- 4 Check **Enable synchronization**.
- 5 Do one of the following, depending on whether you want Custodian Manager to synchronize with some or all of the containers in the nominated domain or server:
 - To synchronize with all the containers, click **Whole Domain/Server** and then optionally choose to synchronize with mail-enabled users or mail-enabled groups only.
 - To synchronize with selected containers only, click **The following containers** and then click **Add a container** to supply the container details.
- 6 Click **OK**.

Setting the configuration options for Custodian Manager

Many aspects of Custodian Manager are configurable. For example, you can specify the following:

- The frequency with which Custodian Manager synchronizes custodian details with the corresponding Active Directory or Domino LDAP directory accounts.
- The number of days that Custodian Manager should wait before it marks as deactivated a custodian for whom no Active Directory or Domino LDAP directory account is available.
- Whether to delete the email addresses associated with a custodian before you synchronize the custodian with the corresponding Active Directory or Domino LDAP directory account.

To set the system configuration options for Custodian Manager

- 1 In the Custodian Manager home page, click **Settings**.
- 2 In the **Settings for** box in the Settings page, click the category of settings that you want to customize.

You can configure general Custodian Manager options (**General**). You can also control how Custodian Manager synchronizes the custodians with the corresponding Active Directory or Domino LDAP directory accounts (**Profile Synchronization**).

- 3 For each option whose value you want to change, do the following in the order listed:
 - Click **Edit** at the right of the row.
 - Set the required value.
 - Click **OK** at the right of the row.
- 4 When you have set all the required options, click **OK** at the bottom of the page to return to the previous page.
- 5 If necessary, restart the Enterprise Vault Accelerator Manager service to put your changes into effect.

Searching for items

This chapter includes the following topics:

- [About searching with Discovery Accelerator](#)
- [Creating and running Discovery Accelerator searches](#)
- [About the search criteria options](#)
- [Guidelines on conducting effective searches](#)
- [Pausing and resuming Discovery Accelerator searches](#)
- [About the Monitor Searches tab](#)
- [Selecting the archives in which to search](#)
- [Specifying the details of custom search attributes](#)
- [Defining email targets with Address Manager](#)
- [Building Discovery Accelerator search schedules](#)

About searching with Discovery Accelerator

When you have created a case or folder, you must search for information to include in it. This process involves the following activities:

- Running one or more searches on the relevant vault stores for suitable information. Discovery Accelerator offers a wide range of search criteria from which to choose: words and phrases to look for, date ranges, message size, author and recipient addresses, and more.
- Studying the search results to assess their suitability, and then either accepting or rejecting the results.
- Searching again, until you have amassed all the information that you need.

When you are happy with the search results, you then go on to review the items that you have found.

You can build search schedules if you want to run searches at set times or set up recurrent searches that run automatically. You can also customize the list of Enterprise Vault archives in which Discovery Accelerator searches for items.

If you want to search for particular message senders or recipients, you can store their email addresses in Address Manager. When you next define the criteria for a search, you can select the users from a list.

Creating and running Discovery Accelerator searches

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

To create and run a Discovery Accelerator search

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

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

- 2 Click the **Searches** tab.

3 Click New Search.

The search properties pane appears.

Search

Context: Internal Audit - Contract Violations

Name:

Based on Search: <No Template>

Search Type: Immediate

☐ Automatically accept search results

☐ Include items already in review

▲ Date range

Date range: Specific date range

From:

To:

☒ Use Historical Information for Custodians and Custodian Groups

▲ Search terms

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

To or from: Any of:

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

5 Enter the required search criteria.

See [“About the search criteria options”](#) on page 95.

- 6
- Click **Save** to start an immediate search or queue a scheduled search to start automatically at the appointed time.

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

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

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

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

- 7
- When the search has completed, choose whether to accept or reject the results. Note the following:
- Discovery Accelerator does not add the captured items to the review set until you accept the search results. If you did not check **Automatically accept search results**, you must manually accept or reject the results.
- The options to assign a default mark and reviewer to the search results apply only to newly discovered items. If the search results include items that you have previously captured and added to the review set, these items retain their assigned marks and reviewers.

The option to keep existing marks applies only to those items to which reviewers have already assigned marks in another case.

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

About the search criteria options

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

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

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

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

Search section

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

| | |
|-----------------|--|
| Context | Identifies the case or research folder in which the search runs. When the folder is not linked to any case, "My Research" appears. |
| Name | Specifies a name for the search, such as "Daily Message Capture (London)". |
| Based on Search | Lets you select an existing search as the basis on which to set the criteria for the new search. |

| | |
|-------------------------------------|--|
| Save results in | <p>If displayed, lets you select a location in which to save the results. Select New folder in <Context> in the drop-down list if you want to specify the details of a new folder in which to save the results.</p> <p>This option is available only when you create a search in a folder that is not linked to any case (you have selected "My Research" in the left pane).</p> |
| Search Type | <p>Specifies whether the search runs immediately or at a scheduled time. If you select Scheduled, you can specify a period during which the search is to run. You can also choose from one of a number of existing schedules.</p> <p>See "Building Discovery Accelerator search schedules" on page 115.</p> |
| Automatically accept search results | <p>Specifies whether to add the search results to the review set automatically. This option may be useful for any proven searches that you intend to run on a regular basis. If you check Automatically accept search results, you cannot reject the results and change the search criteria. We recommend that you uncheck Automatically accept search results until you have tested that the search returns the expected results.</p> <p>A search that returns an error from any archive is not automatically accepted, regardless of this setting.</p> |
| Include items already in review | <p>Specifies whether the search results can include the items that you have previously captured and added to the review set. For an immediate search or scheduled search, we recommend that you check this box to ensure that the results include the items that may already be in review from other searches.</p> |

Date range section

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

| | |
|---|---|
| Today / Yesterday / Last 7 days / Last 14 days / Last 28 days | <p>Limits the search to items that were sent or received during the selected period. The date ranges are relative to when the search runs, which is today in the case of an immediate search.</p> <p>You may find these options useful when creating a scheduled, recurrent search that runs once every day, week, two weeks, or four weeks. For example, if the search runs once a week, select Last 7 days to limit the range to the days since the search last ran.</p> |
| Specific date range | <p>Lets you search the items that were sent or received during a longer or more specific period than the other date range options permit. To enter a date, click the options at the right of the From and To boxes and then select the required date. Unlike the other date range boxes, a specific date range remains static and not relative to when the search runs.</p> <p>Check Use Historical Information for Custodians and Custodian Groups to use both the current information and historical information for custodians and custodian groups in the search. If you uncheck this option, Discovery Accelerator uses only the current set of custodians, groups, and email addresses. Any deactivated users and groups are excluded from the search.</p> |
| Since search last ran | <p>For a scheduled search only, lets you search the new items that have arrived since the last time you ran the search. This option is similar to options such as Today and Yesterday. However, it lets you set an explicit start date for the first run of the search.</p> <p>By default, this option searches from the date of the last run (or the start date for the first search) to the current day minus 1 (that is, up to yesterday).</p> |

Search terms section

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

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

SUBJ: "organizational changes"

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

SUBJ: "organizational changes""license agreements"

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

- Press the Return key in a search box to add another line to it. If you type multiple lines in a search box, choose **Any of** or **All of** in the left box to determine whether OR or AND conditions connect the lines.
- To add the name of a custodian or target to the **From** box or **To** box, click **Target** at the right and then selected the required custodian or target.
See [“Setting up custodians”](#) on page 83.
See [“Defining email targets with Address Manager”](#) on page 112.
To identify the custodians for whom you want to search, you specify their *primary attribute values*. By default, the primary attribute value of a custodian is his or her display name. However, Custodian Manager lets you nominate an alternative attribute as the primary attribute. For example, you can choose to search for custodians by their employee ID numbers.
See [“Setting the primary custodian attribute”](#) on page 86.

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

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

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

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

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

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

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

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

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

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

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

- You can use an asterisk (*) to represent zero or more characters, and a question mark (?) to represent exactly one character. There must be a minimum of three characters before an asterisk, and you cannot use it at the start of a word. For example, the following search string

returns hits for the words "make", "maker", "making", "wonder", "wondering", and so on:

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

Similarly, there must be a minimum of three characters between each instance of a question mark in the search string.

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

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

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

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

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

Attachments section

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

Number

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

| | |
|-----------------|--|
| File extensions | <p>Specifies the file name extensions of particular types of attachments for which to search. Separate the extensions with space characters. For example, type the following to search for items with HTML or Microsoft Excel file attachments:</p> <pre>.htm .xls</pre> <p>This search option evaluates attachments by their file names only; it does not check their file type. For example, suppose that a user changes the file name extension of a <code>.zip</code> file to <code>.zap</code> and then sends the renamed file as an email attachment. A Discovery Accelerator search for items that have attachments with a <code>.zip</code> extension does not find the email with the renamed attachment.</p> <p>If you specify one or more attachment types, only the attachments are searched, and not the items that contain them. For example, you cannot search for those items that have a specific word in their subject line or content and that contain a specific type of attachment.</p> <p>Remember that there are attachment file formats such as Fax or Voice that do not contain text.</p> |
|-----------------|--|

Miscellaneous section

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

| | |
|--------------------------------|--|
| Message size | <p>Specifies the size in kilobytes of each item for which to search, as reported by the message store (Microsoft Exchange, Lotus Domino, and so on). The item size includes the size of any attachments.</p> |
| Message type | <p>Searches for items of the selected types. This option is only available if:</p> <ul style="list-style-type: none"> ■ Your Enterprise Vault server is running Enterprise Vault 5.0 or later. ■ You have specified a date range that does not include a date before you installed Enterprise Vault 5.0. |
| Include only non-indexed items | <p>Lets you search for the unindexed items that do not normally appear in the search results, such as binary files and encrypted mail items.</p> <p>If you check this option, you must leave the Content field empty.</p> |

Retention category

Searches for items to which Enterprise Vault has assigned the selected retention categories.

Policies section

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

| | |
|---------------------------------|---|
| Policy Type | <p>Lets you search for the items that match certain classification policies. There are several types of policies:</p> <ul style="list-style-type: none">■ Inclusion. Any item that your policy management software has classified for inclusion in the review set may be guilty of the most serious offenses, such as swearing, racism, or insider trading.■ Exclusion. Spam items and newsletters are typical examples of the items that your policy management software may classify for exclusion from the review set.■ Category. Your policy management software may categorize the items that exhibit certain characteristics, such as containing Spanish text. This type of policy provides no information on whether an item should be included in or excluded from the review set. <p>These policy types are not mutually exclusive. Your policy management software may apply multiple policies of different types to the same item.</p> |
| Policies | <p>Lets you search for items to which the policy management software has applied a specific policy.</p> <p>Discovery Accelerator automatically adds to the list any new policies that it encounters when it runs a search.</p> |
| Filter policies by current case | Lets you omit from the list those policies that are not in use in the current case. |

Custom attributes section

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

See [“About the Enterprise Vault search properties”](#) on page 217.

See “[Specifying the details of custom search attributes](#)” on page 108.

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

sample.attribute.value

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

Enterprise.Vault.Service.Account system DA.Administrator

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

Guidelines on conducting effective searches

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

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

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

<http://www.symantec.com/docs/TECH88031>

Pausing and resuming Discovery Accelerator searches

If you have the required permission level, you can monitor the status of all Discovery Accelerator searches and pause or resubmit them as necessary. This is true even if you do not normally have access to the cases with which the searches are associated. However, you cannot view the search criteria or the results of the searches unless you normally have access permission.

You must have the Monitor Search permission to pause and resume searches. By default, users with the role of Discovery System Admin have this permission.

To pause or resume a search

- 1 Click the **Monitor** tab in the Discovery Accelerator client.
- 2 Do one or more of the following:

■ To view detailed status information on a search, click its name.

■ To pause or resubmit one or more searches, select the required searches and then click **Pause** or **Resubmit**.

Note: If you pause a search that you are conducting over a wide date range or a large number of archives, Discovery Accelerator may take a little time to halt it.

About the Monitor Searches tab

The Monitor Searches tab lets you view the status of the searches that you have conducted. You can stop and pause searches that are still in progress, and resubmit failed searches. As [Table 8-1](#) shows, you can access the tab in several ways.

Table 8-1 How to access the Monitor Searches tab

| To view the status of | Do this |
|--|--|
| Searches that are running in all cases. | Click the Monitor tab in the Discovery Accelerator client. |
| Searches that are running in one case only. | <div>1 Click the Cases tab in the Discovery Accelerator client.</div> <div>2 Click the required case in the left pane.</div> <div>3 Click Searches.</div> |
| Searches that are running in one or more research folders. | <div>1 Click the Research tab in the Discovery Accelerator client.</div> <div>2 In the left pane, click the required research folder, or click All Research to view the status of searches in all the folders.</div> <div>3 Click Searches.</div> |

The Monitor Searches tab is divided into three panes:

- The filter pane at the top lets you filter the searches by name, status, date, and type. Select the required filter options and then click the **Apply filter** button at the right. Click the button again to clear the filter options.
- The center pane lists the searches that match the selected filter options. The information that this pane provides varies, depending on the context in which you display the Monitor Searches tab.

| | |
|-------------------|--|
| Name | Identifies the search. |
| Case or Folder | If displayed, identifies the case or folder in which the search has run. |
| Submitter | Identifies the person who submitted the search. |
| Run Date | Shows the date and time at which the search started. |
| Hits | Shows the number of items that match the search criteria. |
| Targeted Archives | Shows the number of archives that Discovery Accelerator has searched. |
| Status | Shows the status of the search. |
| Search Type | Indicates the type of search. |
| Enabled | If displayed, shows whether scheduled searches are currently enabled. When a search is not enabled, it does not run. |

- When you click a search in the center pane, the bottom pane provides the following information:

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

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

Selecting the archives in which to search

You can customize the list of Enterprise Vault archives in which Discovery Accelerator searches for items. For example, there may be archives that you want to exclude from any searches because they contain irrelevant material.

As well as setting the default, global list of archives, which are available to the searches that you conduct in any case, you can customize the searchable archives for individual cases.

You must have the application permission Manage Archives to set the global list of archives, and the case permission Manage Archives to set a case-level archive list.

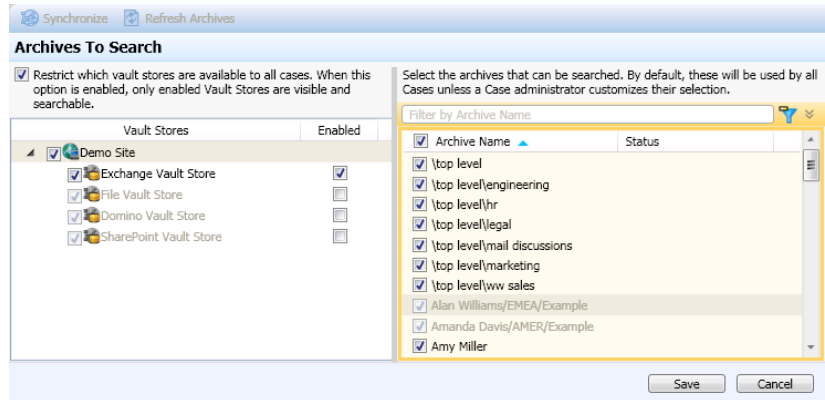
To select the archives in which to search

1 Do one of the following:

- To set the default list of archives that are available to all cases, click the **Application** tab in the Discovery Accelerator client, and then click the **Archives** tab.
- To set the list of archives in which to search for one case only, click the **Cases** tab and then click the required case in the left pane. Then click the **Archives** tab.

If Discovery Accelerator lists a lot of cases, you can filter the list with the fields at the top of the pane. As well as filtering the cases by name, you can choose whether to list any research folders that are associated with them.

2 Choose the archives in which to conduct searches.



Use the following techniques to include or exclude archives:

- If you are setting the application-wide list of archives that are available to all cases, and you want to hide certain vault stores from case administrators, check **Restrict which vault stores are available to all cases**. Then, in the **Enabled** column of the vault store list, check the vault stores that you want to make visible and searchable. When a case administrator sets the list of searchable archives for a case, only those archives that are in enabled vault stores are available for selection. If you restrict a vault store and then later remove the restriction, the vault store automatically becomes available to existing cases, where it is included in new searches.
- If you want to set the list of archives in which to search for one case only, check **Customize searchable archives for this case**.
- Check or uncheck a vault store at the left to include its archives in searches or exclude them from searches.
- Click a vault store at the left to list the associated archives at the right. Then check or uncheck the archives to include or exclude them. The **Status** column shows whether each archive has been copied, moved, or deleted as part of a Move Archive operation by the Enterprise Vault administrator. If Discovery Accelerator lists a large number of archives, you can filter the list with the fields at the top of the right pane.
- Check or uncheck the **Archive Name** box at the top of the right pane to include or exclude all the available archives.

3 Click **Save**.

Specifying the details of custom search attributes

When Enterprise Vault processes an item, it populates a number of the item's properties with information and stores this information with the archived item. For example, Enterprise Vault stores information about the retention category of each item and the number of attachments that it has. All this information is accessible in Discovery Accelerator searches; in the **Custom attributes** section of the search properties pane, you can enter the names of the relevant properties as free-form attributes.

See [“About the Enterprise Vault search properties”](#) on page 217.

If you want to search repeatedly for certain property information, you can define the property as a custom search attribute. Then the **Custom attributes** section of the search properties pane always contains a field in which you can enter the relevant property details.

You must have the Manage Search Attributes permission to specify the details of a custom search attribute. By default, only users with the role of Discovery System Admin have this permission.

To specify the details of a custom search attribute

- 1 Click the **Configuration** tab in the Discovery Accelerator client, and then click the **Search attributes** tab.
- 2 Click **New**.

The Search attribute pane appears.

Search attribute

Template: New Search Attribute ▼

Name:

Display name:

Description:

Type: Single line ▼

Data type: String ▼

Mandatory: ☐

Default value:

Operators: Any
All
Exact
Phrase

Save Cancel

- 3 In the **Template** list, select the attribute whose details you want to provide, or select **New Search Attribute** to define the details of a new one.

The template attributes are as follows:

| | |
|----------------------------|--|
| Archived Date | Searches for messages according to the date on which Enterprise Vault archived them. |
| Categories And Keywords | Searches for messages according to the category that the author has assigned to them. |
| Conversation Tracking GUID | Searches for messages that have been indexed with the specified conversation tracking identifier. |
| Expiry Date | Searches for messages according to the date on which their retention period expires. |
| Languages | Searches for messages in the specified language. |
| Last Modified Date | Searches for messages according to the date on which they were last modified. |
| Message Class | Searches for messages that fall into a specific message class, such as IPM.Appointment or IPM.Contact. |
| Message Importance | Searches for messages that are marked with a particular importance level. |

| | |
|--------------------------|--|
| Message Security | Searches for messages according to whether the author has digitally signed or encrypted them. |
| Message Sensitivity | Searches for messages that are marked with a particular sensitivity level. |
| Number Of Days To Expiry | Searches for messages that are scheduled for deletion in the specified number of days. |
| Number Of Recipients | Searches for messages that have the specified number of recipients. |
| Original Identifier | Searches for messages by their original identifier. |
| Original Location | Searches for messages according to their original folder location, such as the Inbox or Drafts folder. |
| Saveset Identifier | Searches for messages according to the identifier that is assigned to the saveset (.DVS) file. |
| Vault Permission | Searches for messages that are in all the folders to which you have access. |

When you select an attribute, Discovery Accelerator automatically adds predefined values to the other boxes.

- 4 Check that the name, display name, and description are correct.
- 5 In the **Type** list, select the user interface elements with which to present the custom attribute options in Discovery Accelerator searches. This causes additional boxes to appear with which you can set additional options.

The options are as follows:

| | |
|----------------|--|
| Single line | A single-line box lets the user enter or edit short text strings. |
| Multiple lines | A multi-line text box lets the user enter or edit long strings over several lines. |

| | |
|--------------------|---|
| Checkboxes | <p>A check box is a square box that is selected or cleared to turn on or off an option. More than one check box can be selected.</p> <p>If you intend to set up multiple check boxes for a custom attribute, use the Column size box to specify the number of check boxes to group in a column. With a small column size and several check boxes, there may be more than one column per line. To display all the check boxes in a single row, set Column size to a number equal to or more than the number of check boxes.</p> <p>To assign values to the check box options, click New value and then type the names with which to label the options and their values. Check Selected to mark an option as selected by default.</p> |
| Radio buttons | <p>With a radio button, you make a choice among a set of mutually exclusive, related options. Users can choose one and only one option. Use the Column size box to indicate how the options are to be grouped, and the Values area to assign values to the options. Check Selected to mark an option as selected by default.</p> |
| List box | <p>With a list box, you can select from a set of values that are presented in a list that is always visible.</p> <p>If you check Multiple selection, you can hold down Shift or Ctrl to select several items from the list box. Assign values to the entries in the list box by clicking New value. Selected indicates the default value.</p> |
| Drop down list box | <p>A drop-down list is a closed version of a list box with an arrow next to it. Clicking the arrow opens the list.</p> <p>Assign values to the entries in the list box by clicking New value. Selected indicates the default value.</p> |

Note the following:

- When you specify the values to associate with custom attributes, enclose the values in double quotation marks.
- For some of the attribute types, you can choose operators with which to qualify the values. To select multiple operators, hold down Ctrl or Shift and then click the required operators. For more information on the operators, see the Enterprise Vault API documentation.

- 6 In the **Data type** drop-down list, specify the data format with which the values that you assign to the custom attribute must conform. The options are String, Number, and Date.
- 7 Click **Save**.

Defining email targets with Address Manager

Among the criteria that you can define when you set up a search in Discovery Accelerator are the email addresses for which to look in items. If an employee has multiple email addresses then, to save you from having to enter them all whenever you set up a search, you can add them to a target entry in Address Manager. Then you can specify the target name in your search criteria as a shorthand way of listing all the associated addresses.

Target groups provide a way to collect a number of people under a group name. You can then use this name as a shorthand way of referring to the list of people. For example, you could create a target group called "Directors" and then add the names of all the company directors to the group. When you create a search, you can search for items that are sent to the target group Directors, instead of listing all their names individually. You can add a target to multiple target groups.

Unlike the custodians and custodian groups whose details you can supply through the Custodian Manager Web site, targets and target groups are not synchronized with an external source such as Active Directory.

You can set up targets and target groups at the application level, where they are available to all cases, and at the individual case level.

Setting up targets

Depending on the permissions that you have been granted, you can add an application-wide target (available in all cases) or a case-specific target.

You must have the Manage Global Target and Target Groups permission to add application-wide targets, and the Manage Targets permission to add case-specific or folder-specific targets.

To set up a target

- 1 Do one of the following:
 - To add an application-wide target, click the **Custodians** tab in the Discovery Accelerator client, and then click the **Address Manager** tab.

- To add a case-specific target, click the **Cases** tab and then click the required case in the left pane. Then click the **Address Manager** tab.
- 2 Click **New Target** at the top of the pane.
- The New Target pane appears.

New Target

First name:

Last name:

Display name:

Email addresses:

Enter one email address or display name per line. Do not use quotes.

Save Cancel

- 3 Type the first name and last name of the target.
The first name is optional, but the last name is mandatory.
- 4 If you want to amend how the target name appears in Discovery Accelerator, type the required name in the **Display Name** box.
- 5 In the **Email addresses** box, type all the email addresses of the target.
Type each address on a line of its own.
- 6 Click **Save**.

Adding targets to target groups

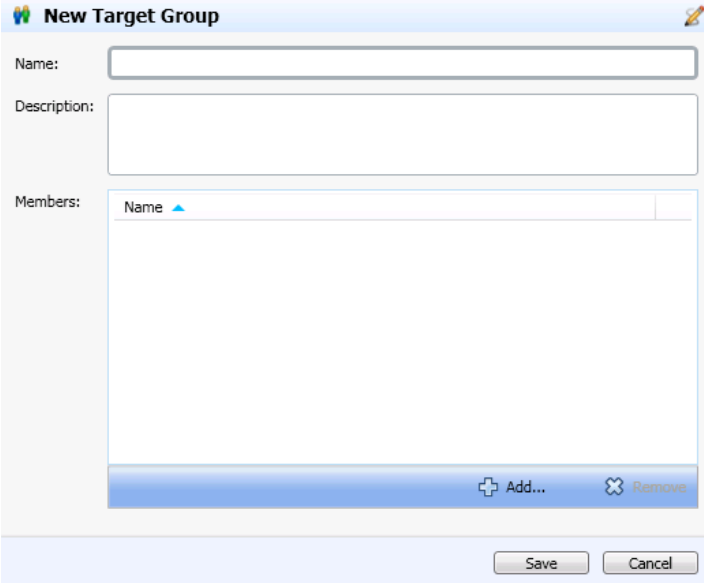
After you have set up a few targets, you can combine them in a group.

You must have the Manage Global Target and Target Groups permission to add targets to application-wide target groups, and the Manage Targets permission to add them to case-specific or folder-specific groups.

To add targets to a target group

- 1 Do one of the following:
 - To add an application-wide target group, click the **Custodians** tab in the Discovery Accelerator client, and then click the **Address Manager** tab.
 - To add a case-specific target group, click the **Cases** tab and then click the required case in the left pane. Then click the **Address Manager** tab.
- 2 Click **New Target Group** at the top of the pane.

The New Target Group pane appears.



New Target Group

Name:

Description:

Members:

| Name ▲ |
|--------|
|--------|

+ Add... X Remove

Save Cancel

- 3 Type a name and optional description for the group.
- 4 Click **Add**, and then select the targets to include in the group.

Use the following techniques to select the targets:

 - To find all the names that contain certain characters, type those characters in the **Filter** box and then click **Find**.
To remove the filter, delete the characters that you typed in the **Filter** box and then click **Find** again.
 - To select multiple adjacent targets, hold down the Shift key and click the first and last target in the range. To select multiple nonadjacent targets, hold down the Ctrl key and click the required targets.

- Press Ctrl+A to select all the names in the list.

Click **OK** when you have finished.

- 5 Click **Save**.

Building Discovery Accelerator search schedules

As well as running searches immediately, you can schedule them to run at a future time. This facility may be desirable if, for example, you want to run an extensive search during an off-peak period, or you need to run the same search repeatedly. To create a scheduled search, you first define a *search schedule* and then select it as one of the criteria of the search.

Note: The SQL Server Agent service is responsible for managing search schedules, so you must ensure that it is running. For instructions on how to configure the SQL Server Agent service, see the *Installation Guide*.

Setting up new search schedules

You must have the Manage Schedules permission to set up new search schedules. By default, users with the application role of Discovery System Admin have this permission.

To set up a new search schedule

- 1
- Click the **Configuration** tab in the Discovery Accelerator client, and then click the **Search Schedules** tab.
- 2
- Click **New**.

The Schedule Details pane appears.

Schedule Details

Name:

☒ Enabled

Description:

Schedule Type

☐ Start when SQL server agent starts

☐ Start when CPU(s) are idle

☐ Once

☒ Recurring

Occurs every 1 day(s), at 01:00.

Recurring Schedule

Occurs:

Daily

Every

1

day(s)

Daily frequency:

☒ Occurs once at:

01 h : 00 min (time)

☐ Occurs every:

Save

Cancel

- 3
- Type a name and an optional description for the schedule.
- 4
- Check **Enabled** so that the schedule is available for selection when you define the criteria for a new search.
- 5
- Select the required schedule type. The options are as follows:

| | |
|------------------------------------|---|
| Start when SQL server agent starts | Causes any searches that use this schedule to run immediately after the SQL Server Agent service has started. |
| Start when CPU(s) are idle | Causes any searches that use this schedule to run when the system is quiet. For more information on CPU idle schedules, see the information on scheduling jobs in the online Help for SQL Server Management Studio. |

| | |
|-----------|---|
| Once | Causes any searches that use this schedule to run only once, at the time that you set in the schedule. When you select this option, several additional boxes appear. Click the On date box to select the required date. Enter the time in the At time box in the format <i>hh:mm</i> , using the 24-hour clock. |
| Recurring | <p>Causes any searches that use this schedule to run automatically at the interval that you specify in the schedule.</p> <ul style="list-style-type: none"> ■ Occurs. Defines the interval in days, weeks, or months. ■ Daily frequency. Defines whether the schedule runs once a day or several times a day, within a given period. ■ Duration. Defines whether to restrict the schedule to a particular period within given dates. |

6 Click **Save**.

Examples of recurring search schedules

Any searches that use the following schedules run automatically at the interval that you specify in the schedule.

To create a schedule that runs once every day at 2 A.M. from now on

- 1 Select **Daily**, and enter **1** in the **Every n day(s)** box.
- 2 Select **Occurs once at**, and enter **02:00** in the **(time)** box.
- 3 Select **No end date**.

To create a schedule that runs every 3 hours on Mondays, between 9 A.M. and 6 P.M., for the period between March 1 and August 2

- 1 Select **Weekly** and then check **Mon**.
- 2 Select **Occurs every**, and then enter **3** and select **Hour(s)**.
- 3 Enter **09:00** in the **Starting at** box and **18:00** in the **Ending at** box.
- 4 Select March 1 for the start date and August 2 for the end date.

To create a schedule that runs at 9 P.M. on the first day of alternate months from now on

- 1 Select **Monthly** and **Day**, and enter **1** in the day box and **2** in the **month(s)** box.
- 2 Select **Occurs once at**, and enter **21:00** in the **(time)** box.
- 3 Select **No end date**.

Manually reviewing items

This chapter includes the following topics:

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

About reviewing with Discovery Accelerator

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

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

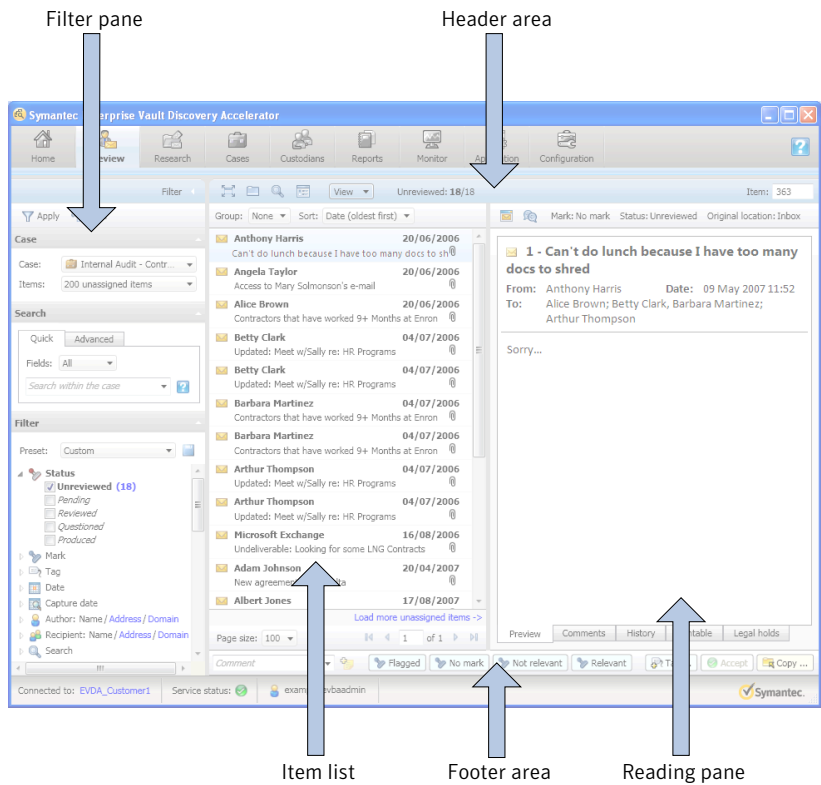
You must have the Review permission to review items.

To access the Review pane

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

About the Review pane

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



Header area

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



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



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

See [“About research folders”](#) on page 141.



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



Sets your preferences for the Review pane.

See [“Setting your Review pane preferences”](#) on page 138.

View

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

Unreviewed

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

Item

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

Group

Groups the items in the list by date, author, subject, or the policy action with which policy management software has tagged them.

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

Sort

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

Stack

Lets you hide or show duplicate items and similar items in the review set. Discovery Accelerator considers items to be duplicates when they have exactly the same content. The items that Discovery Accelerator considers to be similar have the same metadata properties, such as their author display names, subjects, and number of attachments.

The option to hide or show duplicate items is available only in cases that you have enabled for analytics. However, the option to hide or show similar items is available in all cases, regardless of whether you have enabled them for analytics.

If you sort the items before you select an option in the **Stack** field then, after you have selected the **Stack** option, the items may no longer be in the original sort order. For example, this is the case if you first choose to sort the items by the **Author** column and then select one of the **Stack** options.

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

<http://www.symantec.com/docs/DOC3621>



Downloads the current item in its original form and opens it in the appropriate application. You can also download an item by right-clicking the item and then clicking **View original**.



Finds all the items that share the same subject line as the selected item. This feature also generates a hierarchy view for Exchange mail items.



Sends the current item for printing.

Mark

Shows the mark that is assigned to the current item.

Status

Shows the status of the current item.

Filter pane

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

See “[Filtering the items in the Review pane](#)” on page 124.

Item list

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

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

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



Reading pane

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

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

Footer area

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

| | |
|---|--|
|  | Displays the first page of items for review. |
|  | Displays the previous page of items for review. Pressing the key sequence Alt+z performs the same function. |
| <i>n of m</i> | Shows the number of the currently displayed page and the total number of pages. To go to a particular page, type its number in the box and then press Enter. |



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



Displays the last page of items for review.

Comment

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

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

No mark/Relevant/Flagged/
Not relevant

Applies the required mark to the selected items.



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



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

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



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



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

Filtering the items in the Review pane

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

To filter the items in the Review pane

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

| | |
|----------------------|---|
| Temporary Assignment | <p>This option lets you reserve the specified number of items in the review set. Other reviewers cannot see these items until you have finished work on them.</p> <p>When both of the following conditions apply, it is better to select the All Items option than the Temporary Assignment option:</p> <ul style="list-style-type: none">■ You want to browse the items without marking or tagging them or adding comments to them.■ You use the Enterprise Vault Discovery Collector application to collect, analyze, and manage data for your organization. <p>In these circumstances, choosing Temporary Assignment can cause unnecessary delays when you conduct an export run with Discovery Collector.</p> |
| All Items | <p>This option lets you view all the items in the review set, even if they have been assigned to other reviewers.</p> <p>You may duplicate the work of other reviewers if you use this option. Therefore, we recommend that you select this option only if there are no other reviewers working alongside you, or you want to browse the items without marking them.</p> |
| My Items | <p>This option lets you review any items that your case administrator has assigned to you.</p> |



- 3












If you have enabled analytics in the selected case, use the facilities in the **Search** area to find items that match your specified criteria.










See [“Searching within the review set”](#) on page 128.
- 4

In the **Filter** section, select the *facets* (item classifications) that you want to apply. To show the available values, click the facet name or the arrow at the left of the name.

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

| | | |
|---|-----------------|--|
|  | Attachment type | (Available only in cases that you have enabled for analytics.) Selects items by the type of file that is attached to them. |
|  | Author | Selects items by the name of the person who sent them. In cases that you have enabled for analytics, you can also select authors by their email addresses or domains. |

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

| | | |
|---|------------------|--|
|  | Policy action | <p>Selects items by the policy action with which your policy management software has tagged them. This action can be one of the following:</p> <ul style="list-style-type: none"> ■ Include (demands or suggests capture in the review set). ■ Exclude (precludes capture or advocates non-capture in the review set). |
|  | Recipient | (Available only in cases that you have enabled for analytics.) Selects items by the names, email addresses, or domains of their recipients. |
|  | Scheduled search | Selects items that one or more scheduled searches have captured. |
|  | Search | Selects items that one or more searches have captured. |
|  | Size (KBytes) | Selects items by their size in kilobytes. |
|  | Status | Selects items by their status, such as Pending, Questioned, or Reviewed. |
|  | Tag | Select items by the tags that reviewers have assigned to them. |
|  | Tagged by rule | (Available only in cases that you have enabled for analytics.) Selects items by the rule that you have used to mark them automatically. |
|  | Type | Selects items by their type. |

Note the following:

- Each facet value is a hyperlink that, when clicked, selects that value and immediately filters the item list accordingly. Click the facet value again to remove it from the filter.
 If you have already selected one or more values within the same facet, clicking another one deselects the others. However, it does not affect any values that you have selected within other facets.
- The numbers next to the facet values show the number of matching items. After you apply the filter, Discovery Accelerator updates these numbers to show how many of the items are now in the item list. For example, the values for the Author facet initially show the number of matching items in the entire review set. If you then set the value of the Status facet to

Unreviewed and apply this filter, the Author values are updated to show only the number of unreviewed items for each author.

Facet values that are shown in an italicized font do not have any matching items in the current item list.

- When you select two or more values for a facet, Discovery Accelerator looks for items that match any of the values. For example, you can choose to view all the items that have a status of Pending or Questioned by selecting both values.

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

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

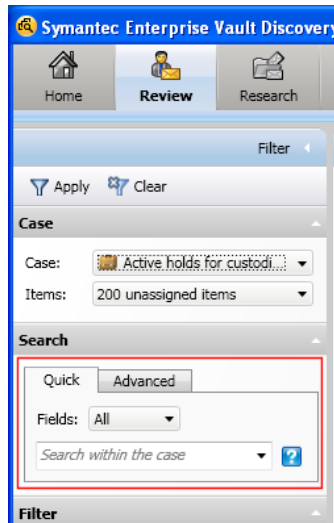
5 Click **Apply** at the top of the filter pane.

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

Searching within the review set

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

Figure 9-1 Quick and Advanced search tabs in the Review pane



Conducting quick searches

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

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

Table 9-1 Quick search features

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

To conduct a quick search

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

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

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

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

Conducting advanced searches

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

To conduct an advanced search

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

The Advanced search dialog box appears.

This dialog box has much in common with the visual rule builder with which you can construct analytics rules.

- 2 Type a name and description for the search.
- 3 In the **Search builder** area, define one or more conditions that an item must meet. To define the conditions, proceed as follows:
 - In the **Select attribute** drop-down list, choose an attribute of the items for which to search. For example, choose Subject if you want to search the subject lines of items.
See [“About the search attributes”](#) on page 61.
 - In the next drop-down list, choose an operator to apply to the selected attribute. For example, if you have set the attribute to Subject, you can choose the Contains operator to search for items whose subject lines contain certain words.
See [“About the operators”](#) on page 71.
 - Set the required value for the attribute. For example, when the attribute is Subject and the operator is Contains, you can type **Symantec** to search for items whose subject lines contain this word. Note the following:
 - The search string cannot contain any punctuation characters other than the underscore character.

- You can append an asterisk (*) as a wildcard character to the end of the search string.
- SQL Server does not index commonly occurring words such as "the" and "and", so Discovery Accelerator ignores these words when it encounters them in a search string. You can override this behavior by editing the SQL Server noise word file.

See [“About SQL Server noise words”](#) on page 74.

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

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

See [“Manually editing queries in analytics rule definition language \(RDL\)”](#) on page 77.

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

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

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

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

Finding all items in the same conversation

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

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

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

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

To find all items in the same conversation

- 1 In the **Review** pane, select an item for which you want to find all the related items.
- 2 Right-click the item, and then click **View conversation**.

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

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

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

Assigning review marks and tags to items

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

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

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

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

Tips:

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

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

To assign a review mark or tag to an item

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

To select multiple adjacent items, click the first item, and then hold down the Shift key and click the last item. To select nonadjacent items, click the first item, and then hold down the Ctrl key and click additional items. To select all the items, press Ctrl+A.
- 2 Do one or more of the following:
 - To apply a mark to the items, click the appropriate button at the bottom right of the pane.
After a few moments, Discovery Accelerator changes the status of the items accordingly.
 - To assign tags to the items, click the **Tags** button below the Reading pane, and then select the required values.
 - To accept the marks and tags that analytics rules have applied to the items in this case, click the **Accept** button.

Adding comments to items

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

To add a comment to an item

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

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

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

Viewing the history of items

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

To view the history of an item

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

Discovery Accelerator displays the following details:

- The subject, date, and details of the sender and recipients.
- The item type, such as Microsoft Exchange or Bloomberg, and its direction (Internal, ExternalInbound, or ExternalOutbound).
- The case in which Discovery Accelerator captured the item.
- When and how Discovery Accelerator captured the item.
- The ID of the item within Discovery Accelerator.
- The original location from which the item was archived.
- The status history of the item, including the reviewers who marked the item and the date and time at which they did so.
- Any policy and policy action with which your policy management software has tagged the item.

Displaying printable versions of items

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

To display a printable version of an item

- 1 In the Review pane, select the item that you want to print.
- 2 Click the **Printable** tab at the bottom of the Reading pane.

Discovery Accelerator displays a printable version of the item.

- 3 Click the **Print** button at the top of the Reading pane to send the item for printing.

Downloading the original versions of items

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

To download the original version of an item

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

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

Copying the item list to the Clipboard

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

To copy the item list to the Clipboard

- 1 In the Review pane, do one of the following:
 - To copy a single row in the item list, right-click it and then click **Copy items details to clipboard**.
 - To copy all the rows, first press Ctrl+A to select them all. Then right-click and click **Copy items details to clipboard**.
- 2 Open the application in which you want to paste the information.
- 3 Paste the information in the normal way.

Changing how the Review pane looks

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

Table 9-2 How to customize the Review pane

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

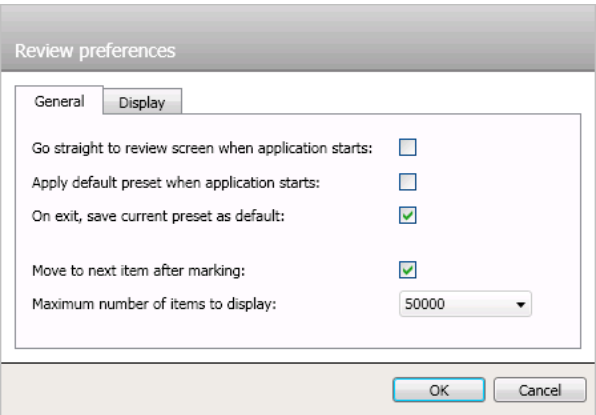
Setting your Review pane preferences

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

To set your Review pane preferences

- 1
- Click the **Review Preferences** button in the header area of the Review pane.

The Review preferences dialog box appears.



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

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

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

| | |
|-------------------|---|
| Font | Sets the font to use for all buttons and labels in the Review pane. |
| Item list font | Sets the font to use in the item list. |
| Reading pane font | Sets the font to use in the Reading pane. |

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

4 Click **OK**.

Working with research folders

This chapter includes the following topics:

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

About research folders

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

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

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

Creating research folders

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

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

To create a research folder

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

The folder properties pane appears.

Folder

Name:

<My Research>

Production details

Output folder:

Search details

Searchable Vault Stores:

- ☒ Demo Site
 - ☐ Exchange Vault Store
 - ☐ File Vault Store
 - ☐ Domino Vault Store
 - ☐ SharePoint Vault Store

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

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

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

Copying items to research folders

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

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

To copy an item to a research folder

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

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

Reviewing the items in research folders

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

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

To review the items in a research folder

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

See [“About the Review pane”](#) on page 120.

Exporting items from research folders

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

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

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

To export the items from a research folder

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

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

The output folder path can contain up to 100 characters.

- 6 Click **Apply**.

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

Giving other users access to your research folders

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

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

To give another user access to a research folder

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

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

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

Converting research folders into cases

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

The newly created case complies with the U.S. government's Federal Information Processing Standards (FIPS) for encoding and encrypting data, if you used Discovery Accelerator 9.0.4 to make the source research folder. However, if you make a folder with an older and non-FIPS-compliant version of Discovery Accelerator and then convert it into a case with Discovery Accelerator 9.0.4, the case is not FIPS-compliant.

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

To convert a research folder into a case

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

Exporting and producing items

This chapter includes the following topics:

- [About exporting and producing items](#)
- [How exporting differs from producing](#)
- [Performing an export or production run](#)
- [About the limits on the number of simultaneous export and production runs](#)
- [Identifying the archives that contain duplicates of a specific item](#)
- [How to optimize export and production runs](#)
- [Making the export IDs visible in Microsoft Outlook](#)

About exporting and producing items

If you want to review items offline or present them in evidence to a third party then you must export them from Discovery Accelerator. Discovery Accelerator supports a number of file formats for exporting content. You can export all content in its native format or as an HTML rendering of the content. Export to HTML if you want to export review marking information and comments along with each item.

How exporting differs from producing

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

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

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

You do not have to wait until the end of the reviewing process to carry out production; you can produce the items that you have reviewed at any time. You can then carry out productions of further items later, after they have been reviewed. If you use the same output folder and production run name for multiple runs, Discovery Accelerator overwrites the report summary each time.

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

Performing an export or production run

If you want to review items offline or present them in evidence to a third party, you must export them from Discovery Accelerator. There are several output formats from which to choose, including PST, Domino NSF database, HTML, and MSG. Exporting the items as HTML lets you export review marking information along with each item.

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

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

To perform an export or production run

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

If Discovery Accelerator lists a lot of cases, you can filter the list with the fields at the top of the pane. As well as filtering the cases by name, you can choose whether to list any research folders that are associated with them.

- 3 Click the **Export/Production** tab.
- 4 Click **New** at the top of the window.

The Export Details pane appears.

Export Details

Name:

Output folder:

Type: ☐ Production ☒ Export

Items Selection

Item ID:

Original source:

| | | |
|--|--|---|
| <input checked="" type="checkbox"/> Microsoft Exchange | <input type="checkbox"/> Instant Messaging | <input type="checkbox"/> SMTP |
| <input type="checkbox"/> Domino | <input type="checkbox"/> Bloomberg | <input type="checkbox"/> Unspecified/Pre v.6 ite... |
| <input type="checkbox"/> File system | <input type="checkbox"/> Fax | <input type="checkbox"/> Sharepoint |

Policy Action:

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

Items:

Search:

Mark:

Last Marked by:

Current Status:

Policy:

Apply Cancel

- 5 In the **Name** box, type a name for the run.
The name that you specify here becomes the name of the subfolder in which Discovery Accelerator stores the output from the run.
- 6 In the **Output folder** box, type the path to the folder on the Discovery Accelerator server in which you want to store the output from the run.
The folder path can contain up to 100 characters.
Discovery Accelerator places the output from the run in a subfolder of the nominated folder.
- 7 Choose whether to produce or export the selected items.
If you select **Production**, a Production Details box appears in which you can set the ID prefix and starting sequence number for the production. You may have set this when you created the case, but you can change it here.

8 In the **Items Selection** box, choose the items that you want to export.

The options are as follows:

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

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

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

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

<http://www.symantec.com/docs/DOC3621>

- 10 Check **Include journal recipients in reports** if you want the export reports to include recipient information from the journal envelope (P1) of Microsoft Exchange journal items. This lists all the recipients of each item, regardless of their placement in the To, CC and BCC fields.

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

- 11 Choose whether to export the items in their original format or as HTML.

If you click **Original Type**, you can choose to output Microsoft Exchange items as individual MSG files or encapsulate them all in a single Personal Folders (.pst) file.

If you click **PST**, Discovery Accelerator displays some additional options with which you can set a password and a maximum size for the file. The password can contain alphanumeric characters only. The default size of the file is 600 MB, and it cannot exceed 1.5 GB.

If you click **HTML**, Discovery Accelerator displays some additional options with which you can choose to include comments and mark history, and the contents of attachments.

- 12 In the **Number of items to export** box, type the required number of items. Note that Discovery Accelerator exports the oldest items. For example, if you choose to export 100 items, Discovery Accelerator exports the 100 oldest items that match the selected options.

If you have chosen to exclude duplicate items or similar items, they do not count towards the number of exported items. Discovery Accelerator exports the specified number of unique items only.

- 13 If you are exporting file system items or Lotus Domino items and want to make them read-only so that they cannot be changed or accidentally deleted, check **Read Only**.

- 14 Click **Apply**.

- 15 When the run has finished, open the output folder on the Discovery Accelerator server to retrieve the exported items. This folder also includes the reports that list the items that you have exported.

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

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

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

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

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

See [“Export/production configuration options”](#) on page 179.

Identifying the archives that contain duplicates of a specific item

When you perform an export run or production run, you can choose to exclude any duplicate items in the review set. If you want to identify all the archives that contain duplicates of a specific item, you can do so by running a SQL query against the Discovery Accelerator customer database.

To identify the archives that contain duplicates of a specific item

- 1 On the SQL Server computer, start SQL Server Management Studio.
- 2 In the left pane of the SQL Server Management Studio window, expand the tree until the required Discovery Accelerator customer database is visible.
- 3 Click the customer database, and then click **New Query**.
- 4 Enter the following query, and then click **Execute**:

```
Declare @ItemID nvarchar(50)
Declare @ProductionID int
```



```
Declare @DAID BigInt

Set @ItemID = 'Export ID or Bates number of item'
Set @ProductionID = ID of export or production run

SELECT @DAID = DiscoveredItemID
        FROM tblProductionToDiscoveredItem
        WHERE ProductionID = @ProductionID and ExportID = @ItemID
SELECT dbo.fx_GetDuplicateItemArchives (@DAID, @ProductionID)
        As ArchiveList
```

where:

ItemID Identifies the duplicate item. You can specify either the export ID (for an exported item) or the Bates number (for a produced item). For example:

```
Set @ItemID = '000622'
```

To determine the export ID or Bates number, check the details of the item in the export or production report.

ProductionID Identifies the export or production run that contains the duplicate item. For example:

```
Set @ProductionID = 57
```

To determine the ID of the export or production run, look at the summary information in the export or production report.

The query returns a list of the archives that contain duplicates of the specified item.

How to optimize export and production runs

For the best results when exporting or producing items, follow these guidelines:

- Export to a high-speed drive that is located on the Discovery Accelerator server.
- Avoid conducting multiple export runs at once. If this is unavoidable, store the output from each run on a different drive.
- Export email messages in their original format, if you can. This is much faster than encapsulating the messages in a single Personal Folders (.pst) file. Only export items in HTML format when this is essential.

- If an export fails for any reason, use the **Re-try** facility in preference to the **Re-Export** facility.

Making the export IDs visible in Microsoft Outlook

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

The configuration option that is called "PST ExportID Column Name" lets you set the name of the custom column.

See ["Export/production configuration options"](#) on page 179.

To make the export IDs visible in Microsoft Outlook

- 1 Open the exported .pst file in Outlook.
- 2 Right-click the column headers in Outlook, and then click **Field Chooser**.
- 3 Click **New**.
- 4 In the **Name** box in the New Field dialog box, type **Export ID**, and then click **OK**.
- 5 Close the Field Chooser dialog box.
- 6 Right-click the column headers in Outlook, and then click **Customize Current View**.
- 7 Click **Fields** and then, in the **Select available fields from** list, select **User-defined fields**.
- 8 Add the **Export ID** field to the list of displayed fields, and then click **OK** twice to close the dialog boxes.

Creating and viewing reports

This chapter includes the following topics:

- [About the Discovery Accelerator reports](#)
- [Creating Discovery Accelerator reports](#)
- [Available Discovery Accelerator reports](#)
- [Viewing existing reports](#)
- [Deleting reports](#)

About the Discovery Accelerator reports

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

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

Note: Any reports that you used with Discovery Accelerator 2007 or earlier are not suitable for use with Discovery Accelerator 9.0.

Creating Discovery Accelerator reports

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

To create a Discovery Accelerator report

- 1

Click the **Reports** tab in the Discovery Accelerator client.
- 2

Click **New** at the top left of the window.
- 3

In the **Type** box, select the type of report that you want to create.

See “[Available Discovery Accelerator reports](#)” on page 156.

In some instances, choosing a report type causes additional boxes to appear so that you can define the scope of the report.
- 4

In the **Name** box, type a unique name that contains up to 50 characters.
- 5

If required, type an optional description that contains up to 250 characters.
- 6

Set any remaining report parameters, and then click **Apply**.
- 7

When Discovery Accelerator has generated the report, double-click the report name in the left pane to view it.

Available Discovery Accelerator reports

Table 12-1 describes the reports that accompany Discovery Accelerator.

Table 12-1 Available Discovery Accelerator reports

| This report | Shows |
|--|--|
| Archive Source report | The Enterprise Vault archives in which you have conducted Discovery Accelerator searches within a selected case. |
| Case History report | Information on a selected Discovery Accelerator case, including the users who have access to the case and the searches, reviews, and production runs that they have conducted. |
| Export Run Duplicates report | The duplicate items that Discovery Accelerator has found because you chose to enable deduplication when you conducted an export run. |
| Item Detail report | The items in the selected case. |
| Legal Holds report | The items in the selected case on which Discovery Accelerator has placed a hold to stop them from being deleted from the Enterprise Vault archives. |
| Production Run report | The items in each production run and export run for a selected case. |

Table 12-1 Available Discovery Accelerator reports (*continued*)

| This report | Shows |
|--|---|
| Production Run Duplicates report | The duplicate items that Discovery Accelerator has found because you chose to enable deduplication when you conducted a production run. |
| Productions report | The production runs that you have conducted for the selected case. |
| Searches report | The live and accepted searches in the selected case. |
| Security report | The users who have access to the selected case, and their associated roles and permissions. |

The following sections provide detailed information on the available reports.

Archive Source report

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

This report contains the following fields.

Table 12-2 Fields in the Archive Source report

| This field | Shows |
|-------------------------------------|---|
| Archive ID | The identifier that Enterprise Vault has assigned to the archive. |
| Archive Name | The name of the Enterprise Vault archive. |
| Vault Store | The vault store in which the archive is located. |
| Hits In Archive | The number of hits that the search has generated. |
| Archive Status | Whether or not the archive is available. |
| Earliest Mail Date In Archive (UTC) | The earliest date on which the items in the archive were sent and received. |
| Latest Mail Date In Archive (UTC) | The latest date on which the items in the archive were sent and received. |

Case History report

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

This report contains the following fields.

Table 12-3 Fields in the Case History report

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

Table 12-3 Fields in the Case History report (*continued*)

| This field | Shows |
|-----------------------------------|---|
| # of Unique Hits | The number of items that the search has retrieved that no other search in the case has retrieved. |
| Review | |
| Items Reviewed | The number of items in the case review set that reviewers have marked. |
| Items Assigned | The number of items in the case review set that are currently assigned to reviewers for marking. |
| Production/Export History | |
| Date of Production/Export | The date on which the production or export was completed. |
| Production/Export Name | The name of the production run or export run. |
| Production/Export ID | The identifying number that Discovery Accelerator has assigned to the production run or export run. |
| Status | The progress of the production run or export run, expressed as a percentage value. |
| Begin ID/End ID | The identifying numbers of the first and last items in the production run. -1 means None. |
| Number of Items Produced/Exported | The number of items in the production run. -1 means None. |
| Search Name | The name of the search with which you selected items for production. |
| Mark | The name of the review mark with which you selected items for production. |
| Location | The path to the folder on the file system where you can find the produced or exported items. |

Export Run Duplicates report

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

This report contains the following fields.

Table 12-4 Fields in the Export Run Duplicates report

| This field | Shows |
|----------------------------|--|
| DAID | The identifying number that Discovery Accelerator has assigned to the duplicate item. |
| Duplicate of exported DAID | The identifying number of the item that this item duplicates. |
| SSID | The identifier of the saveset (.DVS) file that contains the duplicate item. |
| Archive ID | The identifier that Enterprise Vault has assigned to the archive in which the duplicate item is stored. |
| Archive Name | The name of the Enterprise Vault archive. |
| Location | The location in the user's mailbox from which the item was archived. |
| Latest Reviewer | The reviewer to whom this duplicate item was assigned. |
| Latest Comment | The last comment that a reviewer has assigned to the duplicate item. |
| Mail Date | The date on which the duplicate item was sent. |
| Author | The author of the duplicate item. |
| Recipients (truncated) | The recipients of the duplicate item. This may not be a full list because Enterprise Vault truncates the list of recipients. |
| Subject | The subject line of the duplicate item. |
| Searches | The searches that match this duplicate item. |

Item Detail report

The Item Detail report provides information on the items in the selected case.
This report contains the following fields.

Table 12-5 Fields in the Item Detail report

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

Legal Holds report

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

This report contains the following fields.

Table 12-6 Fields in the Legal Holds report

| This field | Shows |
|-------------|---|
| Case | |
| Total Items | The number of items in the case review set. |

Table 12-6 Fields in the Legal Holds report (*continued*)

| This field | Shows |
|--------------------------------|--|
| Legal Hold State | Whether the items in the case review set are on hold to stop users from deleting them from their Enterprise Vault archives. |
| Legal Hold Group ID | The ID of the legal hold on the case. |
| Reason | The reason why the items in the case have been placed on hold. |
| Legal Hold Status | The progress of the legal hold. |
| Total Items Held | The number of items that Discovery Accelerator has placed on hold. |
| Total # of Hold Errors | The number of items that Discovery Accelerator cannot place on hold. |
| Total # of Items Deleted | The number of items that have been deleted from the Enterprise Vault archives before Discovery Accelerator can place them on hold. |
| Total Archives with Items Held | The number of archives in which items have been placed on hold. |
| Searches | |
| Search ID | The identifying number that Discovery Accelerator has assigned to the search. |
| Search Name | The name that the creator of the search has assigned to it. |
| Search Date | The date on which the search was run. |
| Total Hits | The total number of items that match the search criteria. |
| Total Unique Items | The number of items that the search has retrieved that no other search in the case has retrieved. |
| Total Unique Items Held | The number of unique items that Discovery Accelerator has placed on hold. |
| Total Archives | The number of Enterprise Vault archives that the search has queried. |
| Archive Details | |

Table 12-6 Fields in the Legal Holds report (*continued*)

| This field | Shows |
|--------------------|--|
| Archive ID | The identifier that Enterprise Vault has assigned to the archive. |
| Archive Name | The name of the Enterprise Vault archive. |
| Vault Store | The vault store in which the archive is located. |
| # of Items on Hold | The number of items on hold in the archive. |
| Earliest Date | The earliest date on which the items on hold were sent and received. |
| Latest Date | The latest date on which the items on hold were sent and received. |

Production Run report

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

This report contains the following fields.

Table 12-7 Fields in the Production Run report

| This field | Shows |
|--------------------|---|
| Bates ID/Export ID | The identifying Bates number or export number of the item. |
| DAID | The identifying number that Discovery Accelerator has assigned to the item. |
| SSID | The identifier of the saveset (.DVS) file that contains the item. |
| Status | How far the production of this item has progressed. |
| Archive ID | The identifier that Enterprise Vault has assigned to the archive in which the item is stored. |
| Archive Name | The name of the Enterprise Vault archive. |
| Location | The location in the user's mailbox from which the item was archived. |

Table 12-7 Fields in the Production Run report *(continued)*

| This field | Shows |
|--------------------------------------|---|
| Number of Duplicate or Similar Items | The number of items that Discovery Accelerator excluded from the production run because they are duplicates of or similar to other items. |
| Latest Reviewer | The reviewer to whom this item was assigned. |
| Latest Comment | The last comment that a reviewer has assigned to the item. |
| Mail Date | The date on which the item was sent. |
| Author | The author of the item. |
| Recipients (truncated) | The recipients of the item. This may not be a full list because Enterprise Vault truncates the list of recipients. |
| Subject | The subject line of the item. |
| Searches | The searches that match this item. |

Production Run Duplicates report

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

This report contains the following fields.

Table 12-8 Fields in the Production Run Duplicates report

| This field | Shows |
|----------------------------|---|
| DAID | The identifying number that Discovery Accelerator has assigned to the duplicate item. |
| Duplicate of exported DAID | The identifying number of the item that this item duplicates. |
| SSID | The identifier of the saveset (.DVS) file that contains the duplicate item. |
| Archive ID | The identifier that Enterprise Vault has assigned to the archive in which the duplicate item is stored. |

Table 12-8 Fields in the Production Run Duplicates report (*continued*)

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

Productions report

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

This report contains the following fields.

Table 12-9 Fields in the Productions report

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

Table 12-9 Fields in the Productions report (*continued*)

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

Searches report

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

This report contains the following fields.

Table 12-10 Fields in the Searches report

| This field | Shows |
|-------------|---|
| Date Run | The date and time at which the search was run. |
| Search Name | The name that the creator of the search has assigned to it. Click the name to display the criteria used for the search. |

Table 12-10 Fields in the Searches report (*continued*)

| This field | Shows |
|------------------|--|
| Search ID | The identifying number that Discovery Accelerator has assigned to the search. |
| Status | The status of the search, such as Pending Acceptance, In Progress, Accepted, Failed, or Completed. |
| # of Archives | The number of archives that Discovery Accelerator has searched. |
| Search Status | The progress of the search, expressed as a percentage value. |
| # of Hits | The number of items that match the search criteria. |
| # of Unique Hits | The number of found items that no other search in the case has retrieved. |

The following table lists the Search Criteria fields.

Table 12-11 Search Criteria fields

| This field | Shows |
|-----------------------|---|
| Date Ranges | The date range between which items must be sent or received to match the search criteria. |
| To | The recipients of the items. |
| From | The senders of the items. |
| Subject | The words or phrases for which to search in the subject lines of items. |
| Content | The words or phrases for which to search in the message bodies of items. |
| Number of Attachments | The required number of attachments to items. |
| Attachment Type | The file name extensions of particular types of attachments for which to search. |
| Message Size | The size of item for which to search. |
| Message Type | The type of item for which to search. |

Table 12-11 Search Criteria fields (continued)

| This field | Shows |
|-------------------------|--|
| Retention Category | The selected retention category that Enterprise Vault has assigned to the items. |
| Policy Type | The selected policy type (Inclusion, Exclusion, or Category) with which third-party policy management software has tagged the items. |
| Policy | The specific policy with which the policy management software has tagged the items. |
| Filter Policies by Case | The filter applied in the search to sort by case. |

Security report

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

This report contains the following fields.

Table 12-12 Fields in the Security report

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

Table 12-12 Fields in the Security report (*continued*)

| This field | Shows |
|--------------------------------------|---|
| Effective Permissions | |
| User/Group Name | The name of the Discovery Accelerator user or group. |
| Effective Permissions for User/Group | The permissions that the Discovery Accelerator user or group has. |

Viewing existing reports

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

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

To view an existing report

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

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

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

- To print the report, click **Print** and then select the printing options that you want.

Deleting reports

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

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

Caution: You cannot recover reports that you accidentally delete.

To delete a report

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

Customizing Discovery Accelerator

This appendix includes the following topics:

- [Specifying the Windows domains in which to browse for users](#)
- [Setting Discovery Accelerator system configuration options](#)
- [Customizing the columns in the Review pane](#)

Specifying the Windows domains in which to browse for users

A number of areas of the Discovery Accelerator client let you browse for users to add to the system. For example, when you nominate a user as the owner of a case, or set up role assignments, you can display a list of users from whom to choose. Discovery Accelerator lets you supply the details of multiple Windows domains on which you can draw when you need to browse for users.

To specify the Windows domains in which to browse for users

- 1 Click the **Configuration** tab in the Discovery Accelerator client, and then click the **Account Information** tab.
- 2 Click **New** at the top of the window.

The Domain Information pane appears.

The screenshot shows a configuration window with three main sections:

- Domain Information**: Contains a text box for "Domain Name (NETBIOS)" and a multi-line text box for "Enter the fully qualified domain names (one per line) for this domain".
- Account Information**: Contains a checkbox for "Use specific account when connecting to the domain (The Service account will be used by default)", a text box for "Account Name (domain\user)", and a password field for "Account Password" (masked with asterisks).
- Global Catalog Information**: Contains a checkbox for "Use the following Global Catalog server" and a text box for "Global Catalog Server".

At the bottom right, there are "Save" and "Cancel" buttons.

- 3 In the **Domain Name (NETBIOS)** box, type the NetBIOS name of the Active Directory domain.
- 4 In the **Enter the fully qualified domain names** box, type any DNS fully qualified domain names that you want to map to the NetBIOS name.
- 5 If you want to use a specific account when you connect to the domain, type the name and password of the account in the **Account Information** area.

By default, when synchronizing with Active Directory, Discovery Accelerator uses the service account under which the Accelerator Manager service is running.

- 6 To force Discovery Accelerator to use a specific server instead of attempting to find the global catalog automatically, check **Use the following Global Catalog server** and then specify the required server.
- 7 Click **Save**.

Setting Discovery Accelerator system configuration options

Discovery Accelerator provides hundreds of configuration options with which you can customize the appearance and performance of the application. These configuration options are grouped into categories, as [Table A-1](#) explains.

Table A-1 Configuration settings by category

| Category | Function |
|---------------------------------|--|
| Ad Hoc Searches | Configure the searches that users can initiate from their research folders. |
| Analytics Conversation Analysis | Control how the analytics features in Discovery Accelerator handle items in the same email conversation. |
| Analytics Data Collection | Control how Discovery Accelerator collects analytics data for the items in a case. |
| API | Control how third-party tools may exchange data with your Discovery Accelerator database through the Discovery Accelerator application programming interface (API). |
| Diagnostics | Enable or disable the Discovery Accelerator troubleshooting facilities. |
| Document Conversion | Customize the error messages that Discovery Accelerator displays in the Review pane when it cannot open an item in the preview window of that pane. |
| Export/production | Configure the output when users export or produce items from Discovery Accelerator for offline review. |
| General | Configure general Discovery Accelerator options. |
| Home Page | Control the appearance of the Home page of Discovery Accelerator. |
| Item Prefetch Cache | Configure the primary settings for the Discovery Accelerator prefetch cache mechanism. This mechanism is designed to speed up the rendering of items in the Review pane. |

Table A-1 Configuration settings by category (*continued*)

| Category | Function |
|---------------------------------|--|
| Item Prefetch Cache (Advanced) | Configure advanced settings for the prefetch cache mechanism. |
| Legal Hold | Configure the Discovery Accelerator Legal Hold mechanism. This mechanism allows case administrators to prevent the documents and messages in their cases from being deleted. |
| Policy Integration | Integrate Discovery Accelerator with your policy management software to better flag items for inclusion in or exclusion from the review set. |
| Profile Synchronization | Control how Discovery Accelerator synchronizes user profiles with the corresponding Active Directory or Domino directory accounts. |
| Reporting | Configure the reports that you generate with Discovery Accelerator. |
| Reviewing | Customize the appearance and functionality of the Review pane. |
| Search | Optimize the search features in Discovery Accelerator. |
| Security | Choose whether to make the SQL Server SystemAdmin logon the creator and owner of Discovery Accelerator search schedules. |
| System | Record the dates on which you installed Enterprise Vault and began to archive data, and more. |
| Vault Directory Synchronization | Configure when Discovery Accelerator synchronizes with the Enterprise Vault archives. |

You must have the Modify System Configuration permission to change the configuration settings. By default, only users with the role of Discovery System Admin have this permission.

To set system configuration options

- 1 Click the **Configuration** tab in the Discovery Accelerator client, and then click the **Settings** tab.
- 2 Click the plus sign at the left of a section name to list the associated settings. Alternatively, type some characters in the filter box at the top of the window to search for the configuration options that contain those characters. For example, type **Color** to find all the options that contain this word in their names.
- 3 For each setting whose value you want to change, do the following in the order listed:

- Click the value in the **Value** column.
 - Set the required value.
 - Click outside the **Value** column.
- 4 When you have set all the required options, click **Save**.
 - 5 If you have changed any setting that has a tick in its **Restart Required** column, restart the Enterprise Vault Accelerator Manager service on the Discovery Accelerator server to put your changes into effect.

The following sections describe the available options.

Ad Hoc Searches configuration options

Use these settings to configure the searches that users can initiate from the research folders that they have created.

| | |
|--|--|
| Ad-hoc search Pre-fix | Specifies the prefix to add to the names of ad-hoc searches that users save to the review set. |
| Allow hits to be deleted from an Ad-Hoc search result | Specifies whether users can delete the items from a folder search before they accept the search into the review set. By default, Discovery Accelerator lets users delete the items. |
| Allow users to commit items without committing audit history | Specifies whether reviewers can commit items from their research folders to the review set without also committing the associated review marks and comments. This option is only used if you select "Commit All Audit History When Committing An Item". By default, Discovery Accelerator expects users to commit the marks and comments when they commit items to the review set. |
| Commit All Audit History When Committing An Item | Specifies whether reviewers must commit the full audit history when committing items from their personal folders to the review set. By default, Discovery Accelerator lets users choose the elements that they want to commit. |

Analytics Conversation Analysis configuration options

Use these settings to control how the analytics features in Discovery Accelerator handle items in the same email conversation.

| | |
|---|---|
| Prefixes to remove during subject normalization | Specifies the prefixes that Discovery Accelerator should remove from the subject lines of items for the purpose of conversation analysis. By default, Discovery Accelerator removes the following prefixes: RE::FW::FWD::Reply::REP::RSVP::SRC::VS::RPLY::Antwort::Aw::Wg::Wtr |
|---|---|

Analytics Data Collection configuration options

Use these settings to control how Discovery Accelerator collects analytics data for the items in a case.

| | |
|---|--|
| EV vault server not available wait period (minutes) | Specifies the number of minutes that Discovery Accelerator should wait before it tries to collect analytics data from an Enterprise Vault server that was previously unavailable. The default setting is 50 minutes. |
|---|--|

API configuration options

Use these settings to control how third-party tools may exchange data with your Discovery Accelerator database through the Discovery Accelerator application programming interface (API). For more information on the Discovery Accelerator API, contact Symantec Support.

| | |
|------------------------------------|---|
| API Enabled | Specifies whether to enable or disable access to the Discovery Accelerator Web service API. By default, access is disabled, which means that none of the API methods works. |
| Database command timeout (seconds) | Specifies the number of seconds that an API command should wait before abandoning its attempt to exchange data with the Discovery Accelerator customer database. |
| Domino template file | Specifies the Lotus Domino template (.ntf) file to use with the GetItems API method. |
| Maximum item chunk size (bytes) | Specifies a limit in bytes on the size of each chunk of item content that you can retrieve with the GetItem and GetItems API methods. |

| | |
|---|---|
| Maximum item list chunk size | Specifies a limit on the number of items for which you can retrieve information in one batch with the GetItemList API method. |
| Temporary storage area | <p>Specifies the location in which to store items temporarily when they are retrieved through the API. By default the setting is blank, which means that the Windows %TEMP% folder is used. If you want to specify an alternative folder, ensure that the Accelerator service account has full permissions on it. The folder must also have plenty of free space.</p> <p>For performance reasons, exclude the temporary storage area from on-access virus scanning.</p> |
| Temporary storage area cleanup interval (minutes) | Specifies the frequency in minutes with which to purge stale data from the temporary storage area. The default setting is 30 minutes. |

Diagnostics configuration options

Use these settings to enable or disable the Discovery Accelerator troubleshooting facilities.

| | |
|----------------------------|--|
| Enable performance monitor | Specifies whether to report Discovery Accelerator performance data, which you can view with the Windows Performance Monitor utility. |
| Enable tracing | Specifies whether to record every server action in the event log. Tracing to the event log applies to information events only, as Discovery Accelerator always records all error messages and warning messages in the log. |

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| Save deduplication information | Specifies whether to generate deduplication information files in a <code>DeduplicationInfo</code> subfolder of your Discovery Accelerator program folder on the Discovery Accelerator server (typically, <code>C:\Program Files\Enterprise Vault Business Accelerator\DeduplicationInfo</code>). These deduplication information files, which are in plain text and XML format, may assist the Symantec Support team when dealing with deduplication-related problems. By default, this setting is unchecked; Discovery Accelerator does not create the files. |
| Save Search Criteria | Specifies whether to generate search criteria files in a <code>SearchCriteria</code> subfolder of your Discovery Accelerator program folder on the Discovery Accelerator server. These files, which are in plain text and XML format, may assist the Symantec Support team when dealing with search-related problems. By default, Discovery Accelerator does not create the files. See “Search returns unexpected results” on page 226. |
| Save XML Search Items To Commit | Specifies whether to save the XML files of the items to commit to the database under a subfolder of the server. By default, Discovery Accelerator does not save the XML files. |
| Save XML Search Results | Specifies whether to generate search results files (one for each Enterprise Vault archive that is searched) in a <code>SearchResults</code> subfolder of your Discovery Accelerator program folder on the Discovery Accelerator server. By default, Discovery Accelerator does not create the files. |

Document Conversion configuration options

Use these settings to customize the error messages that the Review pane of the Discovery Accelerator client may display.

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| Conversion Errors | Specify the error messages to display if Discovery Accelerator cannot display an item in the preview window of the Review pane. Each message can contain up to 200 characters. |
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Export/production configuration options

Use these settings to configure the output when users export or produce items from Discovery Accelerator for offline review.

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| Add Bate identifier to File System exports | <p>Specifies whether to add an identifying Bates number to the file name of each exported item that Enterprise Vault has archived through File Systems Archiving.</p> <p>The options are as follows:</p> <ul style="list-style-type: none">0. Omit the Bates number.1. Add the Bates number to the start of the file name. This option is the default option.2. Append the Bates number to the end of the file name. |
| Always date stamp exported File System items | <p>Specifies whether to append a last-modified date stamp to the file name of each exported item that Enterprise Vault has archived through File Systems Archiving. By default, Discovery Accelerator appends the date stamp.</p> |
| Automatic retry: Maximum retries | <p>Specifies the maximum number of attempts that Discovery Accelerator makes to repeat an export run that failed for any reason. Set the value to 0 to stop Discovery Accelerator from retrying the run.</p> |
| Automatic retry: Minimum time between retries (minutes) | <p>Specifies the minimum delay in minutes between automatic attempts to repeat a failed export or production run. By default, Discovery Accelerator waits five minutes between retries.</p> <p>Note that Discovery Accelerator multiplies this value by the number of retries. So, if this value is 5, the delay between retries starts at five minutes and increases to 10, 15, and so on with subsequent retries.</p> |

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| Custom conversion extension | Specifies the file name extension of the files to create when exporting items for viewing outside Discovery Accelerator. For example, you would specify <code>.xls</code> as the extension for export files in Microsoft Excel format. |
| Custom conversion file | Specifies the name of the template file to use when exporting files in their custom format. For example, if you have created a template file for exporting items in Microsoft Excel format, you can enter <code>ExcelReport.xslt</code> as the file name. |
| Default export folder | <p>Specifies the default folder on the Discovery Accelerator server to use for exported items. If you do not specify a default export folder, Discovery Accelerator uses the folder <code>c:\Discovery Accelerator Export\customer_name</code>.</p> <p>The folder path can contain up to 100 characters.</p> |
| Default Production status | <p>Specifies the status that you want to set as the default current status when you perform an export run.</p> <p>Type one of the following values:</p> <ul style="list-style-type: none"> ■ 0. N/A ■ 1. Pending ■ 2. Reviewed ■ 3. Questioned |
| Default to Unicode for PST and MSG | Specifies whether to export PST and MSG files in Unicode (Outlook 2003 and later) format or ANSI (Outlook 97 through 2002) format. By default, Discovery Accelerator exports the items in Unicode format. |
| Domino Export Template | Specifies the name of the file to use as a template when exporting files to a Lotus Notes Database Template (NTF) file. The default file name is <code>accelexp.ntf</code> . |
| Domino ID File | Specifies the name of the <code>.id</code> file that is used for local Domino authentication when exporting files to an NTF file. The default file name is <code>Accelerator.id</code> . |

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| Domino Password | Specifies the password that is used for local Domino authentication when exporting files to an NTF file. |
| Enable Production threads | Specifies whether to enable or disable all exporting and production facilities. By default, Discovery Accelerator enables these facilities. |
| HTML conversion file | Lets you download, edit, and then upload an XSL style sheet. This style sheet serves as the template for all the export reports that Discovery Accelerator generates in HTML format. |
| Maximum production retry for items stored on slow devices | Specifies the number of attempts that Discovery Accelerator makes to retrieve an item from an offline device, such as a tape drive, before giving up. Enter a value between 1 and 1000, where the default is 120. |
| Minimum number of minutes between retries for items stored on slow devices (min) | Specifies the number of minutes that Discovery Accelerator waits between retry attempts when trying to retrieve an item from an offline device. Enter a value between 1 and 300, where the default is 5. |
| Number of production report threads | Specifies the number of threads that Discovery Accelerator assigns to generating reports of export runs. The default is 5. |
| Number of production threads per production run | <p>Specifies the number of threads in the SQL connection pool that Discovery Accelerator assigns to each export or production run. Enter a value in the range 1 to 25, where the default is 25.</p> <p>See also the configuration setting "Total number of production threads per customer".</p> <p>To determine the maximum number of export or production runs that you can conduct simultaneously, divide the "Total number of production threads per customer" by the "Number of production threads per production run". For example, if you specify 100 for the first setting and 25 for the second setting, you can conduct up to four export or production runs simultaneously. If you try to conduct further export or production runs, Discovery Accelerator holds them in a queue until the required number of threads is available.</p> |

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| Production order Search by RunDate | Sets the order in which Discovery Accelerator lists the searches when you set the criteria for an export run. You can choose to sort the searches by name or by run date. By default, Discovery Accelerator sorts the searches by name. |
| PST ExportID Column Name | <p>In Microsoft Outlook, specifies the label for the column in which to show Discovery Accelerator export IDs. When you export items from Discovery Accelerator as a Personal Folders (.pst) file, and then import this file into Outlook, the export IDs of the items appear in this column.</p> <p>See “Making the export IDs visible in Microsoft Outlook” on page 154.</p> |
| PST Folder Name | Specifies the Outlook folder in which to place the items after you import a Personal Folders (.pst) file that you exported from Discovery Accelerator. |
| Report chunk size | Specifies the number of exported items to list in each report file. The default is 25000. |
| Show PST version option on export run | Specifies whether, when you undertake an export run, Discovery Accelerator prompts you to select a PST version: Outlook 97-2002 (ANSI) or Outlook 2003 (Unicode). By default, Discovery Accelerator does not display the prompt. |
| Show review page on export | Specifies whether, when you initiate an export run or production run, Discovery Accelerator first opens the Review pane. This facility lets you browse the items before you proceed with the run. By default, Discovery Accelerator does not display the Review pane. |
| TAB Conversion file | Lets you download, edit, and then upload an XSL style sheet. This style sheet serves as the template for all the export reports that Discovery Accelerator generates in tab-separated format. |
| Total number of production threads per customer | <p>Specifies the maximum number of threads per customer that Discovery Accelerator assigns when it conducts export or production runs. Enter a value between 50 and 1000, where the default is 100.</p> <p>See also the configuration setting "Number of production threads per production run".</p> |

General configuration options

Use these settings to configure general Discovery Accelerator options.

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| DA Invitation Email Subject | <p>Specifies the subject line of the message that Discovery Accelerator creates when you click Send Email Invite in the Role Assignment tab of the Discovery Accelerator client. When you assign roles to users, you can click Send Email Invite to notify them that they may perform a ClickOnce installation of the Discovery Accelerator client.</p> <p>Note that the Send Email Invite option is only available in those Discovery Accelerator clients that you install by using a ClickOnce deployment package. The option is unavailable in those clients that you install with the MSI installer package.</p> <p>See “Assigning Discovery Accelerator roles to users” on page 32.</p> |
| DA Invitation Email Body | <p>Specifies the body of the message that Discovery Accelerator creates when you click Send Email Invite in the Role Assignment tab of the Discovery Accelerator client. Discovery Accelerator automatically replaces the [url] placeholder with the Web site address of your ClickOnce deployment package.</p> <p>For more information, see the description of the "DA Invitation Email Subject" setting.</p> |
| Enable deduplication | <p>Specifies whether to deduplicate exported items and items that are in review. By default, with this setting checked, Discovery Accelerator deduplicates the items.</p> |
| Hide Active Directory accounts ending with '\$' in account selector | <p>In areas of Discovery Accelerator where you select an Active Directory account, specifies whether to show any accounts whose names end with the character \$. By default, Discovery Accelerator shows these accounts.</p> |
| List searches without sampled hits in filters | <p>When you filter items by search, specifies whether to omit from the list those searches that failed to capture any items. By default, Discovery Accelerator shows these searches.</p> |

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| Maximum number of results to list in 'Choose custodians and / or custodian groups' dialog box | Specifies the maximum number of custodians or custodian groups to list in the Choose custodians and / or custodian groups dialog box. When you create a search, this is the dialog box in which you select the custodians or custodian groups for whom you want to search. By default, the dialog box lists a maximum of 5000 custodians or custodian groups. |
| Show First Name followed by Last Name | Specifies the order in which to display the first and last names of employees. By default, the first name precedes the last name. You may want to uncheck this option when working in countries where the names are typically reversed, such as Japan. |
| Show search sample counts in filters | <p>In areas of Discovery Accelerator such as the Review pane, specifies whether to append the sample size to the name of each listed search. So, if a search has 200 hits, and your monitoring policy requires you to add 10% of captured items to the review set, Discovery Accelerator shows the search as "My Search [20]".</p> <p>By default, Discovery Accelerator shows the sample size.</p> |

Home Page configuration options

Use these settings to control the appearance of the Home page of Discovery Accelerator.

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| Maximum number of cases to show on home page | Sets a limit on the number of cases that users can choose to list in the home page of the application. The default is 10. |
| Maximum number of exports to show on home page | Sets a limit on the number of export runs that Discovery Accelerator can list in the home page of the application. The default is 30. |
| Maximum number of searches to show on home page | Sets a limit on the number of searches that Discovery Accelerator can list in the home page of the application. The default is 30. |

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| Maximum task age (days) to show on home page | Specifies the maximum age of the data that Discovery Accelerator can display for tasks in the home page of the application. The default is 30 days. |
| Show Folders on Home Page | Specifies whether to list individual research folders on the Discovery Accelerator home page. By default, Discovery Accelerator lists the folders. |
| Show Reviewers' statistics to reviewers | Specifies whether reviewers can see the statistics for other reviewers on the home page of the application. By default, all reviewers can see these statistics. |

Item Prefetch Cache configuration options

Use these settings to configure the Discovery Accelerator prefetch cache mechanism. This mechanism retrieves and caches items from the vault store during a scheduled window every night, instead of retrieving each item when the user chooses to review it. The cache therefore helps to speed up the rendering of items in the Review pane. You can specify the size, location, and other characteristics of the cache.

To optimize performance in an environment where you review items very intensively, we recommend the following:

- Use the fastest storage available and set aside a full partition so that there is no competition for I/O.
- Set the maximum size within the cache to match the partition size.
- Set the cache to 365 days before expiry.
- Set the cache to retrieve the full items with HTML and MSG. If you do not need to export the items, you can choose to retrieve the items with HTML only.

The Item Prefetch Cache options are the more commonly used cache options. You can also set the Item Prefetch Cache (Advanced) options.

Cache enabled

Specifies whether to enable or disable the prefetch cache. By default, Discovery Accelerator disables the cache. Therefore, prefetching does not occur and the cache is not used for item retrieval, even if there are items in the cache. Only enable the cache for a Discovery Accelerator database in which you actively review items or where you connect to slow storage for export runs.

We recommend that you do not enable the prefetch cache in any databases that you use primarily for legal hold searches. This generates a lot of unnecessary network traffic and consumes storage space.

Note that the cache is either enabled or disabled for an entire database.

Cache location

Specifies the local path or network share path to the folder in which to store the cache. Within this folder, Discovery Accelerator stores the prefetched files in a subfolder that is called `AcceleratorPrefetch_CustomerId`.

Note the following:

- We recommend that you specify a local path, where possible. If you must specify a network share path, always use the UNC path rather than a mapped drive.
- The folder must already exist; Discovery Accelerator does not create it.
- In a hosting environment, multiple customers must not share the same folder.

Cache maximum item age (days)

Specifies the number of days for which items can remain in the cache before Discovery Accelerator automatically deletes them. The item age is based on the creation time of the file in the cache, and not the time that Discovery Accelerator captured the item or the time that the item was originally sent. The default age is 5 days.

Discovery Accelerator may remove an item from the cache earlier than the maximum item age if the cache becomes full.

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| Cache maximum size (Mbytes) | Specifies the maximum size of the cache in megabytes (MB). The default is 1000 MB. The larger the value of the "Cache maximum item age (days)" setting, the higher the cache maximum size must be to accommodate the items. |
| End prefetching time of day (server local time) | <p>Specifies the time of day at which Discovery Accelerator stops prefetching items. The default is 05:00 A.M. Use this setting with "Start prefetching time of day" to determine the hours of the day that prefetching is active. Configuring a period during which caching does not occur lets you undertake other maintenance activities during this period, such as performing Enterprise Vault backups.</p> <p>To make prefetching active at all times, set this option and "Start prefetching time of day" to the same time.</p> |
| Start prefetching time of day (server local time) | <p>Specifies the time of day at which Discovery Accelerator starts to prefetch items. The default is 20:00 P.M. Use this setting with "End prefetching time of day" to determine the hours of the day that prefetching is active. Configuring a period during which caching does not occur lets you undertake other maintenance activities during this period, such as performing Enterprise Vault backups.</p> <p>To make prefetching active at all times, set this option and "End prefetching time of day" to the same time.</p> |

Item Prefetch Cache (Advanced) configuration options

These settings provide additional, advanced options for configuring the Discovery Accelerator prefetch cache functionality. Use these settings with the Item Prefetch Cache options.

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| Cache encrypted | Specifies whether to encrypt files before they are stored in the cache. By default, Discovery Accelerator does not encrypt the cache. |
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| Cache purge time of day (server local time) | Specifies the time of day at which Discovery Accelerator performs cache housekeeping (primarily removing old items). The default time is 19:00 PM. |
| Maximum capture age (days) | Excludes from the cache those captured items that are older than the specified number of days. The default is 3 days. This setting only has an effect when prefetching is first turned on, or if it has been disabled for some time and is then reenabled. |
| Maximum item fetch attempts | Specifies the maximum number of times that Discovery Accelerator tries to prefetch an item before giving up. The default is 10. |
| Maximum item size to store in cache (bytes) | Sets a limit on the size of items and parts of items that Discovery Accelerator can prefetch. If an item or part of an item exceeds this limit, it is ignored. The default is 10 MB. For example, Discovery Accelerator still prefetches an item that has multiple attachments, none of which is bigger than 10 MB, even though the combined size of the attachments may greatly exceed the 10 MB limit. |
| Minimum time between item fetch retries (minutes) | Specifies the number of minutes that Discovery Accelerator waits between attempts to prefetch items. The default is 30 minutes. Use this setting with "Maximum item fetch attempts" to configure retry behavior for failed fetches. |
| Prefetch attachments | Specifies whether to prefetch the attachments to items. By default, Discovery Accelerator prefetches attachments. Note that attachments of nested items are not prefetched. |
| Prefetch attachments as HTML | Specifies whether to render attachments as HTML when prefetching them. By default, Discovery Accelerator prefetches attachments as HTML. |
| Prefetch immediate search items | Specifies whether to prefetch the items that users have captured with an immediate, unscheduled search. By default, Discovery Accelerator does not prefetch these items. |

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| Prefetch Native format | Specifies whether to prefetch items in their original, native format. By default, Discovery Accelerator does not prefetch the items in their native format. However, if your policy is to review items in their original format then you should enable this feature. |
| Prefetch research items | Specifies whether to prefetch the items that users have placed in personal folders through ad-hoc searches. By default, Discovery Accelerator prefetches these items. |
| Prefetch scheduled search items | <p>Specifies whether to prefetch the items that users have captured with a scheduled search. By default, Discovery Accelerator prefetches the items.</p> <p>Note that items are only prefetched when the search is accepted, so this option works best when scheduled searches are set to auto-accept.</p> |
| Prefetch search items | Specifies whether to prefetch the items that users have captured with a search. You can further control this facility with the "Prefetch immediate search items" and "Prefetch scheduled search items" options. By default, Discovery Accelerator prefetches the items. |
| Prefetch XML structure | Specifies whether to prefetch the XML structure of an item. This structure defines the parts of the item and includes a list of attachments (but not the attachments themselves). The XML structure is used for the preview pane in the Review pane. An XSL transform is applied to the XML to convert it to HTML. By default, Discovery Accelerator prefetches the XML structure. |
| Render HTML for message review | <p>Specifies whether to prefetch the items for review in HTML format. By default, Discovery Accelerator prefetches the items in this format.</p> <p>Prefetching the items improves review performance because Discovery Accelerator does not need to perform the rendering from XML to HTML at review time. The benefits of this are most likely to be noticeable on a system where many reviewers work concurrently.</p> |

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| Render printable HTML | Specifies whether to prefetch the printable versions of items in HTML format. By default, Discovery Accelerator does not prefetch the items in HTML format. However, it is advisable to change the setting if you expect to use the printable view functionality regularly. |
| Retry record retention period (days) | Specifies how long Discovery Accelerator keeps records of repeated, failed attempts to prefetch items. The default is 30 days. |

Legal Hold configuration options

Use these options to control how Discovery Accelerator places and releases holds on the items in a case. You may want to place a hold on items to stop users from deleting them from their Enterprise Vault archives.

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| Enable Legal Hold | Specifies whether to allow case administrators to place a hold on the items in their cases, so that those items cannot be deleted. By default, Discovery Accelerator enables the legal hold functionality. |
| Enable Legal Hold on new case | Specifies whether, when you define the properties for a new case, the option to put items on hold is automatically checked. |
| Legal Hold thread checking period (sec) | Specifies the frequency in seconds with which Discovery Accelerator checks for case items to place on legal hold or release from hold. The default frequency is 30 seconds. |
| Maximum Legal Hold Retry | Specifies the maximum number of times that Discovery Accelerator tries to place a legal hold on an item before giving up. The default number is 2. |
| Number of Legal Hold Threads | Specifies the number of threads with which Discovery Accelerator places or removes legal holds on items. The default number is 10. |
| Placing hold items Batch Size | Specifies the maximum number of items to place on hold concurrently. The default number is 1000. |
| Removing hold items Batch Size | Specifies the maximum number of items to release from hold concurrently. The default number is 1000. |

Policy Integration configuration options

Use these settings to integrate Discovery Accelerator with your policy management software to better flag items for inclusion in or exclusion from the review set.

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| Always show policy display in review grid | When you preview an item that has no associated policies in the Review pane, specifies whether to show the Policy field above the item. By default, Discovery Accelerator hides this field when there are no associated policies. |
| Sort Policies within type | <p>When you preview an item in the Review pane, specifies the order in which to list the associated policies in the banner above the item. Enter one of the following values:</p> <ul style="list-style-type: none"> ■ 0. The policies are not sorted. ■ 1 (default). Discovery Accelerator first groups the policies by policy type (inclusion, exclusion, and category) and then sorts them alphabetically within each type. ■ 2. The policies are sorted alphabetically, regardless of policy type. <p>Changing the sort order does not affect the items that are already in the Accelerator database; only newly-added items are affected.</p> |

Profile Synchronization configuration options

Use these settings to control how Discovery Accelerator synchronizes employee profiles with the corresponding Active Directory or Domino directory accounts.

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| Default Domino domain when creating profiles | Specifies a domain to add to a user name automatically when synchronizing employees with Domino accounts. |
| Default Domino server when browsing for users | Specifies the name of the default Domino LDAP server to use when you browse for new users to add to your Discovery Accelerator system. |
| Force users to use the default Domino server when browsing for users | Stops you from choosing any Domino LDAP server other than the default server when you browse for new users to your Discovery Accelerator system. By default, Discovery Accelerator lets you nominate any Domino server. |

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| Number of synchronization threads | Specifies the number of threads that Discovery Accelerator employs when it synchronizes employee profiles with the corresponding Active Directory or Domino directory accounts. Enter a value in the range 1 through 5, where the default is 1. |
| Remove addresses that do not exist in Domino or Active Directory | <p>Specifies whether Discovery Accelerator deletes the email addresses in an employee profile before it synchronizes the profile with Active Directory or a Domino directory. By default, Discovery Accelerator does not delete the addresses. This is because you may still want to perform searches that use old email addresses, or you may have entered some additional email addresses manually.</p> <p>Discovery Accelerator does not delete the email addresses in the profile if synchronization fails for any reason.</p> |
| Synchronization interval (hours) | Specifies the frequency in hours with which Discovery Accelerator synchronizes employee profiles with the corresponding Active Directory or Domino directory accounts. Enter a value in the range 1 through 24. The default is every eight hours and every time the Accelerator Manager service starts. |
| Synchronize profiles | Specifies whether Discovery Accelerator should attempt to synchronize employees and groups with the corresponding Active Directory or Domino directory accounts. The default is to do so. |
| When service starts wait before synchronizing (minutes) | Specifies the number of minutes to wait after the Accelerator Manager service starts before synchronizing employees and groups with Active Directory or a Domino directory. Enter a value in the range 0 through 720. By default, the service does not wait before synchronizing. |

Reporting configuration options

Use this setting to configure the reports that you generate with Discovery Accelerator.

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| Maximum number of items in report | <p>Specifies the maximum number of items that can appear in an Item Detail report or Production Run report. The default is 500,000.</p> <p>To remove the limit on the number of report items, upgrade your reporting server to SQL Server 2008 with Cumulative update package 1 or later. This package resolves a number of out-of-memory issues that can occur when you generate reports on large numbers of items.</p> |
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Reviewing configuration options

Use these settings to configure the Review pane.

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| Default Page Size | <p>Specifies the default number of items to show in the Review pane. Enter a value in the range 1 through 1000, where the default is 100.</p> |
| Display Marking List | <p>Specifies how to show the available marks in the Review pane: as clickable options across the bottom of the page, or in a drop-down list. By default, Discovery Accelerator shows the marks as clickable options rather than as options in a drop-down list.</p> |
| ECM Temporary Storage Area | <p>Specifies the path to the folder in which temporarily to store the items that you retrieve by using the Enterprise Vault Content Management API. By default, Discovery Accelerator uses the Windows %TEMP% folder.</p> <p>Note the following:</p> <ul style="list-style-type: none">■ We recommend that you specify a local path, where possible. If you must specify a network share path, always use the UNC path rather than a mapped drive.■ The folder must already exist; Discovery Accelerator does not create it.■ In a hosting environment, multiple customers must not share the same folder. |
| ECM Temporary Storage Area Cleanup Interval (Minutes) | <p>Specifies the frequency in minutes with which to purge stale data from the temporary storage area. The default value is five minutes.</p> |

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| Facets To Hide | <p>Provides a comma-separated list of the filter options that are not available to users in the Review pane. The available options are as follows:</p> <p>author, authoraddress, authordomain, authorname, capturedate, commentid, direction, extension, ingestionstatus, legalstatus, maildate, markingid, markstatusid, numattachments, policyaction, policyid, recipientaddress, recipientdomain, recipientname, reviewerid, ruleid, scheduledsearchid, searchid, size, tagid, tagruleid, type.</p> |
| Folder item color when it exists in the review set | <p>Specifies the color with which to identify the items in a research folder that already exist in the associated review set. The default color is red.</p> |
| Highlight Background Color | <p>Specifies the background color with which to highlight instances of search terms in HTML renderings of items. You can enter a color name, such as "Yellow" (the default color), or a red-green-blue color value, such as "#FFFF00".</p> |
| Highlight Foreground Color | <p>Specifies the foreground color with which to highlight instances of search terms in HTML renderings of items. You can enter a color name, such as "Black" (the default color), or a red-green-blue color value, such as "#000000".</p> |
| Hit Highlighting Type | <p>Specifies whether to enable or disable search highlighting in HTML renderings of items. Set the value to 1 (the default) if you want to highlight instances of search terms in items, or to 0 to disable highlighting.</p> |
| Item Unlocking Thread | <p>Specifies whether to turn on or off the lock cleanup thread, which unlocks any items that have been accidentally left locked. For example, this may be the case if a reviewer's computer or Discovery Accelerator client stops working during a reviewing session. By default, the thread is turned on.</p> |
| Label for messages without a subject | <p>Specifies the subject line to assign to those items that do not have a subject line. The default is "No Title".</p> |

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| Maximum items user can temporarily self-assign | Sets a limit on the number of items that users can temporarily assign to themselves while they review. The default is 10000. |
| Maximum Page Size | Specifies the maximum number of items to list on a page within a review set. Enter a value between 1 and 300, where the default is 300. |
| Review Grid File | Lets you download and upload an XML file with which to define the column layout in the Review pane for all users. See “Customizing the columns in the Review pane” on page 205. |
| Review Set Expiry Time (Minutes) | Specifies the number of minutes of inactivity after which a user's review set expires. The default value is 120 minutes. |
| Sanitize HTML for review | Specifies whether to preprocess HTML items before review to remove any script that may cause navigation problems. By default, Discovery Accelerator preprocesses the items. |
| Timeout for building or sorting review set (seconds) | Specifies the number of seconds within which Discovery Accelerator must build a review set or sort a review set before the process times out. The default is 300. |

Search configuration options

Use these settings to optimize the search features in Discovery Accelerator.

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| Allow search and capture of existing items | Specifies whether, when you set the criteria for a new search, you can choose to include previously-captured items in the search results. By default, you have the option to do so. |
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| Buffer Since Last Run | <p>When you select a schedule to use when you define the criteria for a new search, you can select Since last run in the Date range section. This option instructs Discovery Accelerator to search new items that have arrived since you last ran this scheduled search. In the Start box, you enter the date to be taken as a starting point for the first run of the search.</p> <p>By default, Since last run searches from the date of the last run (or the Start date for the first search) to the current day minus 1 (that is, up to yesterday). If required, you can change this interval to search to the current day minus n days. To use Since last run with any searches that run more than once a day, set the interval to 0.</p> |
| Custodian Group Tag | <p>Specifies the tag with which Discovery Accelerator prefixes custodian groups when you enter them in the criteria for a new search. The default is CG.</p> |
| Custodian Tag | <p>Specifies the tag with which Discovery Accelerator prefixes custodian names when you enter them in the criteria for a new search. The default is C.</p> |
| Custom search attributes XML | <p>Specifies the custom search attributes to use in XML form.</p> |
| Enable custom search attributes | <p>Specifies whether you can define custom search attributes and select them when defining the criteria for a search. By default, you can define and select these attributes.</p> |
| Enable Search Threads | <p>Specifies whether to enable or disable all search facilities. By default, Discovery Accelerator enables these facilities.</p> |
| Error search if index is rebuilding or failed | <p>Specifies whether the search of a particular archive returns an error if its index is offline, rebuilding, or failed. By default, Discovery Accelerator returns an error in these circumstances.</p> |

| | |
|--|---|
| Error search if missing items or content | Specifies whether the search of a particular archive returns an error if its index has failed to index either an indexable archived item or the content of the item. The default setting is false (not enabled). |
| Error search if index requires width normalization | Specifies whether the search of a particular archive returns an error if its index must be rebuilt to handle full-width characters correctly. The default setting is Off. |
| Error search if no target resolves to an email address | Specifies whether a search returns an error if none of the targets resolves to an email address, resulting in an empty search. |
| Fail search of archive if archive has been copied or moved | Specifies whether to mark as failed a search of a moved or copied archive, if the destination archive is not included in the search. The default is False, which means that Discovery Accelerator produces a warning when searching such archives, but it does not mark them as failed. |
| Maximum number of searches listed in filters | For areas of Discovery Accelerator that list searches from which you can choose, specifies the maximum number of searches to include in the list. The default is 250. |
| Maximum Search Retries | Specifies the number of times that Discovery Accelerator tries to search an archive before giving up. Enter a value in the range 1 through 50, where the default is 5. |
| Number of acceptance search Threads | Specifies the number of threads that are assigned to accepting search result sets. For example, the default setting of 5 means that no more than five search results sets are accepted at a time. Enter a value in the range 1 through 10. |
| Number of delete search Threads | Specifies the number of threads that are assigned to deleting search result sets. For example, the default setting of 2 means that no more than two search results sets are deleted at a time. Enter a value in the range 1 through 10. |

| | |
|--|---|
| Number of sampling search Threads | Specifies the number of threads that are assigned to sampling search result sets. For example, the default setting of 5 means that no more than five search results sets are sampled at a time. Enter a value in the range 1 through 10. |
| Number of Vault search Threads | Specifies the number of threads that are assigned to searching archives per index server. For example, the default setting of 10 means that no more than 10 archives are searched per Enterprise Vault server at a time. Enter a value in the range 1 through 10. |
| Only allow 'Research this message' on the first selected message | Specifies whether, when you click multiple items in the Review pane and then click Search, Discovery Accelerator lets you specify the search criteria for each of the selected items or only for the first of the selected items. |
| Optimize search based on oldest and youngest items | <p>When set to True, improves performance by excluding from a search those archives that Discovery Accelerator has determined do not contain any items in the date range that you have specified in your search criteria. The default setting is False, which means that Discovery Accelerator searches all the available archives, regardless of whether their contents fall within your specified date range or not.</p> <p>Use this setting with "Synchronize thread checking period (sec)", which is one of the Vault Directory Synchronization configuration options. If you set "Optimize search based on oldest and youngest items" to True, you must lower the setting for "Synchronize thread checking period (sec)" to ensure that Discovery Accelerator does not run searches against out-of-date data. For example, you can lower the setting to 3600 seconds (one hour).</p> |
| Override marks when accepting searches | When accepting the results of a search, specifies whether to override the marks that are assigned to those items that already exist in the review set. Items that you have already produced are exempt. |
| Override Marks when accepting searches only If Not Marked | For items that have previously appeared in other cases, specifies whether to respect any explicitly assigned marks but override all other marks. |

| | |
|---|--|
| Override Reviewers when accepting searches | When accepting the results of a search, specifies whether to override the reviewers that are assigned to those items that already exist in the review set. |
| Override Reviewers when accepting searches only If Not Assigned | When accepting the results of a search, specifies whether to assign to a new reviewer only those items that have not previously been assigned to other reviewers. |
| Require 'Author' / 'Content' / 'From Date' / 'Recipients' / 'Subject' / 'To Date' to be specified | Specifies whether it is mandatory to enter the designated criteria before you can perform a search. By default, these criteria are optional. You may want to make them mandatory to prevent searches from returning an overwhelming number of results. |
| Retry time when index service is busy (min) | Specifies the frequency in minutes with which Discovery Accelerator tries to access an Enterprise Vault Indexing service that is too busy to perform a search. Enter a value in the range 1 through 300, where the default is 5. |
| Retry time when index service not running (min) | Specifies the frequency in minutes with which Discovery Accelerator tries to access an Enterprise Vault Indexing service that is unavailable. Enter a value in the range 1 through 300, where the default is 5. |
| Return only top messages in search results | Specifies whether searches return the top-level items only. Setting this option to Off means that all files attached to the top-level items are displayed in search results. |
| Save SMTP subject rather than filename | For items that were archived using File System Archiving (FSA), specifies whether to show the SMTP message subject rather than the FSA file name in the Review pane. |
| Search result page refresh time | Specifies the frequency in seconds with which Discovery Accelerator refreshes the results summary page during a running search. Enter a value in the range 1 through 300, where the default is 10. |

| | |
|---|---|
| Searches page refresh time | Specifies the frequency in seconds with which Discovery Accelerator refreshes the Searches pane for a case. Enter a value in the range 1 through 300, where the default is 20. |
| Show Search Result In Progress | Specifies whether users can access the Review pane while a search is in progress, so that they can immediately start to review the items that Discovery Accelerator has found. By default, Discovery Accelerator permits this. |
| Target Group Tag | Specifies the tag with which Discovery Accelerator prefixes target groups when you enter them in the criteria for a new search. The default is TG. |
| Target Tag | Specifies the tag with which Discovery Accelerator prefixes target names when you enter them in the criteria for a new search. The default is T. |
| Total number of search results worker threads | Specifies the maximum number of search results worker threads that are allowed to run on the system. These threads handle the processing of search results returned from the archive. The maximum value is 5, and the default is 2. |
| Total number of search threads | Specifies the maximum number of search threads that are allowed to run on the system across all index volumes. The maximum value is 500, and the default is 100. |
| Use sequence number for searches | Optimizes performance for searches that return more than 50,000 results. By default, this option is enabled. |
| When service starts, wait before synchronizing Index Services (minutes) | Specifies the number of minutes that Discovery Accelerator waits at startup before synchronizing with available index services. Enter a value in the range 0 through 300, where the default is 0. |
| When service starts, wait before starting Vault Searches (minutes) | Specifies the number of minutes that Discovery Accelerator waits at startup before searching the archives for items. Enter a value in the range 0 through 300, where the default is 0. |

Security configuration options

| | |
|---|---|
| Show deny permissions for roles | Specifies whether, when you select the permissions that you want to associate with a Discovery Accelerator role, you can also choose to deny certain permissions to users who occupy the role. By denying the permissions, you stop users from acquiring them when they are assigned to other roles that do allow the permissions. The option to deny permissions as well as allow them is enabled by default. |
| Use SQL Server 2005 SystemAdmin Server Role for Schedules | <p>When selected, makes the SystemAdmin logon the creator and owner of Discovery Accelerator search schedules.</p> <p>If you want to lock down your SQL Server instance, uncheck this setting and then do the following in the order listed:</p> <ul style="list-style-type: none"> ■ Add the Vault Service account to the msdb database. ■ Give the Vault Service account Select permissions on the following msdb tables: sysjobs, sysjobschedules, sysjobsteps, and sysschedules. ■ Give the Vault Service account Execute permissions on the msdb stored procedure sp_add_category. ■ Assign the database role SQLAgentUserRole to the Vault Service account. |

System configuration options

Use these options to record the dates on which you installed Enterprise Vault and began to archive data, configure the threads that Discovery Accelerator uses to pause searches, and more.

| | |
|--|--|
| Enterprise Vault Oldest Archived Item Date | <p>Specifies the date on which Enterprise Vault archived the oldest available data.</p> <p>If the oldest archived item date and "Enterprise Vault V5 Installation Date" are the same then, when entering the criteria for a search, you can specify the message type without also specifying a start date. (Discovery Accelerator does not return any pre-5.0 data.) However, if the oldest archived item date is earlier than the V5 installation date, you can only specify the message type if you specify a start date that is on or after the V5 installation date.</p> |
| Enterprise Vault V5 Installation Date | <p>Specifies the date on which you first installed or upgraded Enterprise Vault 5.0 or later.</p> |
| IIS Application Pool | <p>Identifies the application pool in which the Accelerator Web applications are grouped. Application pools allow specific configuration settings to be applied to groups of applications and to the worker processes that service those applications. The default application pool is EVAcceleratorAppPool.</p> |
| Initial Pausing Queue Size | <p>Specifies the maximum number of searches that you can pause instantly. The default is 2.</p> |
| Include Public Folder Vault Stores | <p>Specifies whether to include Public Folder vault stores in searches. By default, Discovery Accelerator does not do this.</p> |
| Include SPS Vault Stores | <p>Specifies whether to include Microsoft SharePoint Portal Server vault stores in searches. By default, Discovery Accelerator does not do this.</p> |
| Number Of Pause Search Threads | <p>Specifies the number of threads that are assigned to pausing searches. Enter a value in the range 1 through 10, where 1 is the default value.</p> |
| Pause queue threshold | <p>Specifies the total number of pause search requests that can be queued at once. Enter a value in the range 10 through 100, where 10 is the default value.</p> |

| | |
|---|--|
| Pause Threads Delay | Specifies the number of minutes that Discovery Accelerator waits at startup before it initializes the threads that are assigned to pausing searches. By default, Discovery Accelerator does not delay before it initializes the threads. |
| Search Pause Thread Checking Period (Sec) | Specifies the number of seconds to wait before starting pause threads. The default is 5. |

Vault Directory Synchronization configuration options

Use these settings to configure when Discovery Accelerator synchronizes with the Enterprise Vault archives.

| | |
|---|---|
| Archive registration/deregistration task period (minutes) | <p>Specifies the frequency in minutes with which to run the archive registration/deregistration task. The default is 60 minutes. To prevent the accidental deletion of Enterprise Vault archives whose contents appear in the Discovery Accelerator review set or search results, this task registers an interest in the archives. The task also discards existing archive registrations when they are no longer required.</p> <p>See also the options "Enable archive registration task" and "Discard existing archive registrations after you turn off 'Enable archive registration task'".</p> |
| Archive selection page size | Specifies the maximum number of Enterprise Vault archives to display on a single page during archive selection. By default, Discovery Accelerator lists a maximum of 100 archives. If the number of available archives exceeds the value that you specify here, Discovery Accelerator displays some extra hyperlinks so that you can page through the archives. |

| | |
|--|---|
| Automatically enable new Vault Stores in departments/cases | <p>Specifies whether, when a new vault store is created, Discovery Accelerator automatically includes it in searches.</p> <p>The options are as follows:</p> <ul style="list-style-type: none"> ■ 1. New vault stores are never automatically enabled. ■ 2. New vault stores are always automatically enabled. ■ 3 (default value). New vault stores are automatically enabled when all the other vault stores in the same site are already enabled. |
| Discard existing archive registrations after you turn off 'Enable archive registration task' | <p>Specifies whether to keep or discard any existing archive registrations if you choose to disable the archive registration task. By default, Enterprise Vault keeps the existing archive registrations after you disable the task.</p> <p>See also the options "Archive Registration task period (minutes)" and "Archive registration/deregistration task period (minutes)".</p> |
| Enable archive registration task | <p>Specifies whether to enable or disable the archive registration task. By default, the task is enabled. If you disable it, a message prompts you to choose the required setting for the option "Discard existing archive registrations after you turn off 'Enable archive registration task'".</p> <p>See also the option "Archive Registration task period (minutes)".</p> |
| Enable new archives for search | <p>Specifies whether, when a new Enterprise Vault archive is synchronized and added to a vault store, it is automatically included in the list of archives in which Discovery Accelerator can conduct searches.</p> <p>The options are as follows:</p> <ul style="list-style-type: none"> ■ 0. Do not enable new archives. ■ 1 (default value). Enable new archives in the application-wide list of archives that is available to all cases. ■ 2. Enable new archives in the application-wide list of archives and in cases where the case administrator has customized the list of searchable archives. |

| | |
|--|--|
| Synchronize archives on search | Specifies whether to synchronize all the archives when running a new search. By default, Discovery Accelerator does not synchronize all the archives. |
| Synchronize Retention Categories on search | Specifies whether to synchronize all the retention categories when running a new search. By default, Discovery Accelerator does not synchronize all the retention categories. |
| Synchronize thread checking period (sec) | <p>Specifies the frequency in seconds with which Discovery Accelerator synchronizes with the Enterprise Vault archives. The default is 21600 (six hours). For best results, you may want to change the synchronization period to 3600 (one hour).</p> <p>The more frequently synchronization occurs, the greater the load on the Discovery Accelerator database. However, if the synchronization is not frequent enough, Discovery Accelerator may take a long time to recognize new archives, vault stores, and retention categories.</p> |
| Synchronize Vault Stores when viewing Department/Case properties | <p>Specifies whether to synchronize the vault stores when displaying the properties page for a case. By default, Discovery Accelerator does not synchronize the vault stores.</p> |

Customizing the columns in the Review pane

Each reviewer can hide or show columns in the item list of the Review pane by right-clicking the column header and then clicking **Select Columns**. The reviewer can also change the column order by dragging and dropping the column headers. However, the changes that a reviewer makes in these ways are available to that reviewer only.

If you want to customize the column layout in the Review pane for all Discovery Accelerator users, you must set up an XML configuration file. Note that reviewers can still change their column layout on the Review pane by using the **Select columns** menu and drag and drop.

[Table A-2](#) lists the columns that you can display and the name to use when you refer to the column in the XML file.

Table A-2 How the column headers are identified in the XML file

| Column header in Review pane | Name to use in XML file | Default visibility |
|------------------------------|-------------------------|--------------------|
| Modified | NeedCommitting | True |
| Attachments | Attachments | True |
| Policy action | PolicyAction | False |
| Comment present | CommentPresent | True |
| From | From | True |
| All recipients | To | False |
| Subject / Filename | Subject | True |
| Date | Date | True |
| Action status | Status | True |
| Last reviewed by | ReviewerPrincipalName | False |
| Message type | MessageType | True |
| Message direction | MessageDirection | False |
| Item ID | DiscoveredItemID | False |
| Comment | Comment | False |
| Last comment by | CommentPrincipalName | False |
| Mark | Mark | False |
| Tag summary | TagSummary | False |
| Archive | KVSVaultName | False |
| Original Location | ItemPath | False |

To configure the default column layout in the Review pane

- 1 Click the **Configuration** tab in the Discovery Accelerator client, and then click the **Settings** tab.
- 2 Expand the **Reviewing** section to show the available options.
- 3 In the **Review Grid File** row, click **Save as**.
- 4 Select a location in which to store the review grid file.

- 5 Open the review grid file in a text editor such as Windows Notepad.
- 6 Edit the file as necessary, using the information at the start of the file to guide you.

Each column that you want to display must have the attribute `visible='true'`. This is either because you have specified the attribute in the configuration file or because the default setting for the column is `true`. The order of the configuration lines determines the left-to-right order of the columns in the Review pane.

The XML file must contain at least one configuration line between the `<reviewgrid>` and `</reviewgrid>` tags.

- 7 Save the file.
- 8 In the **Review Grid File** row on the System Configuration tab, click **Browse**.
- 9 Select the XML file that you want to import.
- 10 Click **Open** at the right of the row to save the changes that you have made.
- 11 Click **Save** at the bottom right of the window.
- 12 Start a new Discovery Accelerator session to see the column changes.

Importing configuration data from an XML file

This appendix includes the following topics:

- [About importing configuration data](#)
- [Sample XML files](#)
- [Format of the Dataload.xml file](#)
- [Format of the dataload XML file for Custodian Manager](#)
- [Importing the configuration data](#)
- [About the ImportExport command](#)

About importing configuration data

As part of the process of setting up Discovery Accelerator, you must enter configuration data on roles, users, cases, and so on. If this data already exists outside Discovery Accelerator and is convertible to XML format, you can import it into Discovery Accelerator from an XML file. Then you can quickly load large amounts of configuration data that might otherwise be time-consuming to enter.

Sample XML files

The Discovery Accelerator server software comes with a number of sample XML files. These files reside in subfolders of the Discovery Accelerator program folder (typically `C:\Program Files\Enterprise Vault Business Accelerator`).

Table B-1 Sample XML files

| File | Resides in subfolder | Function |
|------------------------------|----------------------------------|---|
| Dataload.xml | AcceleratorAdminWeb\Installation | Explains how to load case, target, and vault store data. |
| DataloadCustodianManager.xml | CustodianManagerWeb\Installation | Gives an example of how to load details of custodians, custodian groups, and custom attributes for Custodian Manager. |

Format of the Dataload.xml file

You can use the `Dataload.xml` file with both Compliance Accelerator and Discovery Accelerator, so it contains some information that applies to both applications. However, the file is well documented and shows which sections apply to which application.

Table B-2 Primary Discovery Accelerator sections in Dataload.xml file

| Section | Defines |
|------------------------|--|
| ApplicationVaultStore | Vault stores available to all cases for searching. |
| Employee | Users to add to the system as administrators or reviewers, and the application administration roles to assign to them. |
| ApplicationTarget | Targets and their email addresses. These are available in all cases. |
| ApplicationTargetGroup | Groups of targets. These are available in all cases. |
| Department | Cases. This section includes definitions of the following: <ul style="list-style-type: none">■ Case users■ Case roles that are assigned to individuals■ Vault stores for the case■ Case targets and target groups |
| AttributeDefinition | Custom search attributes. |

The second part of the file describes each XML entry. The last part of the file provides sample entries for a Discovery Accelerator system.

If you use any non-ASCII characters in a dataload file, you must specify the appropriate encoding. For example, you can save a file that contains accented European characters in Unicode format or add the following at the start of the file:

```
<?xml version="1.0" encoding="iso-8859-1" ?>
```

Format of the dataload XML file for Custodian Manager

Use the `DataloadCustodianManager.xml` file to load and update data for Custodian Manager. [Table B-3](#) describes the primary sections in this file.

Table B-3 Primary sections in `DataloadCustodianManager.xml` file

| Section | Defines |
|------------------------------|--|
| CustodianAttributeDefinition | Custom attributes of the Custodian Manager custodians and custodian groups that you want to synchronize with an external source like Active Directory or a Domino LDAP directory. See “Setting up custom custodian attributes” on page 85. |
| Custodian | Individual users for whom you want to search when you conduct a Discovery Accelerator search. See “Setting up custodians” on page 83. |
| CustodianGroup | Any collections of employees for whom you want to search when you conduct a Discovery Accelerator search. These collections can include NT groups, distribution lists, Active Directory containers, Domino LDAP queries, and Domino groups. See “Setting up custodian groups” on page 84. |

Importing the configuration data

You must have the Import Configuration Data permission to import configuration data from an XML file. By default, users with the application role of Discovery System Admin have this permission.

To import configuration data from an XML file

- 1 Click the **Configuration** tab in the Discovery Accelerator client, and then click the **Import Configuration** tab.
- 2 In the **Configuration file** box, type the full path to the XML file that you want to import, or click **Browse** and then choose the file to import.

The path can contain up to 250 characters.

You can specify a UNC path or NTFS path to the file if it is stored on a remote computer. For example:

```
\\server2\EVBA\import.xml
```

- 3 If you want to clear the import information from previous imports before you proceed, check **Clear log before import**.
- 4 Click **Import**.

About the ImportExport command

The ImportExport command provides a command-line alternative to the Discovery Accelerator client for importing data into a customer database. It also lets you export the data from the database to an XML file.

The command is installed in the Discovery Accelerator program folder on the Discovery Accelerator server, together with a configuration file,

```
ImportExport.exe.config.
```

You must have the Import Configuration Data permission to import data with ImportExport, and the Export Configuration Data permission to export the data. By default, users with the application role of System Admin have these permissions.

All newly imported cases comply with the U.S. government's Federal Information Processing Standards (FIPS).

Note: For the best results when using ImportExport on a computer in which User Account Control (UAC) is enabled, run the command with administrator privileges. Right-click the **Command Prompt** shortcut on the Windows **Start** menu, select **Run as Administrator**, and then type the command to start ImportExport. Otherwise, you may find that you cannot perform some operations with ImportExport, such as exporting data from a customer database to an XML file.

ImportExport syntax

```
ImportExport.exe -F:FileName -C:CustomerID [-I] [-L:LogFile] [-O]
[-NoValidation] [-BypassService] [-LogToDB] [-LeaveDBLog]
[-ShowOnlyErrors] [-CommitOnceOnSuccess] [-?]
```

Table B-4 describes the parameters that you can append to the command.

Table B-4 ImportExport command parameters

| Parameter | Function |
|-----------------------|--|
| -F: <i>FileName</i> | Identifies the XML file from which to import data or to which the data is to be exported. |
| -C: <i>CustomerID</i> | Identifies the Discovery Accelerator customer for which to import or export data. If you run ImportExport without any parameters then, when prompted for a customer ID, you can type ? to list all the customer names and identifiers. |
| -I | Instructs the command to import configuration data into the customer database from the XML file that you specify with the -F parameter. Omit this parameter to export data to the specified XML file. |
| -L: <i>LogFile</i> | Specifies the name of the log file. If you omit the path to the file, the command creates it in the Discovery Accelerator program folder on the Discovery Accelerator server. |
| -O | Overwrites the output XML file and log file, if they exist. If you omit this parameter, and the output and log files exist, the command displays an error message and stops. |
| -NoValidation | Accelerates the process of importing data from an XML file by turning off XML validation. The command ignores this parameter if you export data to a file. |

Table B-4 ImportExport command parameters (continued)

| Parameter | Function |
|----------------------|---|
| -BypassService | <p>Instructs the command to bypass the Enterprise Vault Accelerator Manager service and connect directly to the customer database. This may be necessary if you experience out-of-memory problems when you try to import data into or export data from a very large database.</p> <p>To use this facility, you must ensure that:</p> <ul style="list-style-type: none">■ You have access permissions to the customer database.■ The <code>ImportExport.exe.config</code> file specifies the SQL Server for the Discovery Accelerator database as the DSN key. Each time you start the Enterprise Vault Accelerator Manager service, it automatically updates the DSN key value in this file to match the value that is specified in the <code>AcceleratorManager.exe.config</code> and <code>AcceleratorService.exe.config</code> files. So, if you specify a different value in the <code>ImportExport.exe.config</code> file, Discovery Accelerator overwrites it when you next start the service. |
| -LogToDB | <p>Writes the log messages to both the log file and the customer database.</p> |
| -LeaveDBLog | <p>If you also specify the <code>-LogToDB</code> parameter, instructs the command to leave log information on previous imports and exports in the Discovery Accelerator database instead of overwriting it.</p> |
| -ShowOnlyErrors | <p>If you also specify the <code>-LogToDB</code> parameter, instructs the command to report error messages but not information messages.</p> |
| -CommitOnceOnSuccess | <p>Commits the data to the Discovery Accelerator database only if the command imported it without error.</p> |
| -? | <p>Displays the online Help information for the command.</p> |

Examples of ImportExport commands

The following command imports unvalidated data from the file `data.xml`, which is in the folder `C:\temp`. The log file, `import.log`, contains error messages only,

and the command overwrites the previous contents of the log file as it imports the XML data.

```
ImportExport.exe -C:2 -I -F:C:\temp\data.xml -NoValidation -O  
-L:import.log -ShowOnlyErrors
```

The following command exports the data in the Discovery Accelerator database to the XML file `export.xml`, which is in your `%USERPROFILE%` folder on the Discovery Accelerator server (`C:\Documents and Settings\username`). The command also overwrites the error messages that it has previously logged in the database.

```
ImportExport.exe -C:2 -F:export.xml -LogToDB -LeaveDBLog  
-ShowOnlyErrors
```


Enterprise Vault properties for use in Discovery Accelerator searches

This appendix includes the following topics:

- [About the Enterprise Vault search properties](#)
- [Standard Enterprise Vault search properties](#)
- [Custom Enterprise Vault search properties](#)
- [Custom Enterprise Vault properties for File System Archiving items](#)
- [Custom Enterprise Vault properties for SharePoint items](#)
- [Custom Enterprise Vault properties for Compliance Accelerator-processed items](#)

About the Enterprise Vault search properties

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

The Enterprise Vault search properties fall into the following categories:

- Standard search properties, such as the author of an email message or the number of attachments.
- Custom Enterprise Vault properties, such as the type or direction of a message.

- Custom properties for the items that Enterprise Vault for File System Archiving has processed.
- Custom properties for the items that Enterprise Vault for Microsoft SharePoint has processed.
- Custom properties for the items that the Compliance Accelerator Journaling Connector has processed.

Not all properties are present on every item.

Standard Enterprise Vault search properties

Table C-1 lists the standard properties defined in Enterprise Vault.

Table C-1 Standard Enterprise Vault search properties

| Property | Type | Description |
|----------|--------|--|
| adat | Date | The archived date in the range 01/01/1970 through 12/31/2148. |
| anum | Number | The attachment number. Specify 0 for the top-level item. |
| auth | String | The author. |
| cnid | String | The conversation tracking identifier, expressed as a 32-character hexadecimal number. This is currently populated for MAPI items only. |
| coid | String | The original identifier for this component of the item. |

Table C-1 Standard Enterprise Vault search properties (*continued*)

| Property | Type | Description |
|----------|--------|--|
| comr | String | <p>The reason for missing content. The options are as follows:</p> <ul style="list-style-type: none"> ■ 0. No reason available. ■ 1. Content does not exist. ■ 2. Content could not be obtained. ■ 3. Content is (or appears to be) corrupt. ■ 4. Not possible to convert content to suitable format. ■ 5. Conversion of content failed (converter error). ■ 6. Conversion of content timed out. ■ 7. Content requires conversion but its data format is excluded from conversion. ■ 8. Content requires conversion but conversion bypass has been set. ■ 9. Content is encrypted. ■ 10. Content requires conversion but converters are not available, or have not been initialized. ■ 11. Unable to add content to index. ■ 12. Converters did not recognize the file type. ■ 13. Conversion excluded for large files. ■ 14. Conversion excluded for codepages we cannot detect. |
| cont | String | The content of the item (up to 120 characters). |
| crct | String | The current retention category identifier (up to 112 characters). |
| date | Date | The created, sent, received, or archived date in the range 01/01/1970 through 12/31/2148. |
| dtyp | String | The data type of the item. For example, DOC, XLS, or MSG. |
| edat | Date | The expiry date for the item (based on the crct property), in the range 01/01/1970 through 12/31/2148. |
| fpcn | String | The content fingerprint of the item. |
| fpdd | String | The deduplication fingerprint of the item. |
| from | String | The display/friendly name or email address. |
| iden | String | The original identifier for the item. For example, SubmissionId for a sent message. |

Table C-1 Standard Enterprise Vault search properties (*continued*)

| Property | Type | Description |
|----------|--------|--|
| impo | String | Message importance, expressed as a numeric value. 0 = Low, 1 = Normal, and 2 = High. |
| keys | String | Categories/keywords. |
| locn | String | The original location of the item. A sequence of folders. |
| mdat | Date | The last-modified date of the item in the range 01/01/1970 through 12/31/2148. |
| msgc | String | The item's original MAPI message class (for example, IPM.Note). |
| name | String | The display/friendly name or email address of the message author or recipient. |
| natc | Number | The number of attachments. |
| ndte | Number | The number of days to expiry for the item (based on the current retention category identifier). |
| nrcp | Number | The number of recipients. |
| ppgn | String | The display/friendly name or email address of the person on whose behalf a document has been written or a message has been sent. |
| prio | String | The message priority, expressed as a numeric value. -1 = Low, 0 = Normal, and 1 = High. |
| pvid | String | The permission VaultIds for the item (up to 112 characters). |
| rbcc | String | BCC: recipient. |
| rcat | String | The original retention category identifier (up to 112 characters). |
| recc | String | CC: recipient. |
| reto | String | TO: recipient. |
| sens | String | Message sensitivity, expressed as a numeric value. 0 = Normal, 1 = Personal, 2 = Private, and 3 = Confidential. |
| size | Number | The size of the item in KB. |
| snum | Number | The index sequence number, expressed as a 64-bit integer. |

Table C-1 Standard Enterprise Vault search properties (*continued*)

| Property | Type | Description |
|----------|--------|---|
| ssid | String | The saveset identifier of the item. Maximum of 72 characters. |
| subj | String | The subject/title. |
| text | String | The content of the item (cont) or its subject/title (subj). |

Custom Enterprise Vault search properties

[Table C-2](#) lists the custom properties that are defined in Enterprise Vault.

Table C-2 Custom Enterprise Vault search properties

| Property | Type | Description |
|-------------------|--------|---|
| Vault.CopiedFrom | String | <p>Provides the following details for an item that Enterprise Vault's Move Archive feature has copied:</p> <ul style="list-style-type: none">■ The date and time at which the item was copied.■ The identifier of the source archive.■ The saveset identifier of the source item. <p>The format is as follows:</p> <p><i>UTC_datetime_of_copy,source_archive_ID,source_item_Saveset_ID</i></p> <p>If an archive has been moved several times, there is a value for each move.</p> |
| Vault.JournalType | String | <p>For journal messages, the journal type. The options are as follows:</p> <ul style="list-style-type: none">■ E2003■ E2007■ E2007ClearText■ E2007RMS |

Table C-2 Custom Enterprise Vault search properties *(continued)*

| Property | Type | Description |
|--------------------|--------|--|
| Vault.MsgDirection | String | The message direction. The options are as follows: <ul style="list-style-type: none">■ 0 - undefined■ 1 - internal■ 2 - external-in■ 3 - external-out |
| Vault.MsgType | String | The message type. The options are as follows: <ul style="list-style-type: none">■ EXCH■ Bloomberg■ DXL■ FAX.vendor■ IM.vendor |

Custom Enterprise Vault properties for File System Archiving items

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

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

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

Custom Enterprise Vault properties for SharePoint items

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

Table C-4 Custom Enterprise Vault properties for SharePoint items

| Property | Type | Description |
|-------------------------------|--------|--|
| EVSP.Comment | String | The check-in comment. |
| EVSP.CreatedBy | String | The domain name (Windows account name) of the document author. |
| EVSP.DocId | String | The identifier of the SharePoint document. |
| EVSP.Editor | String | The display name of the document editor. |
| EVSP.ModifiedBy | String | The domain name (Windows account name) of the document editor. |
| EVSP.SharePoint_property_name | String | Customer configurable properties. Any SharePoint property. |
| EVSP.Site | String | The name of the SharePoint site. |
| EVSP.SiteId | String | The identifier of the SharePoint site. |
| EVSP.SiteUrl | String | The URL of the SharePoint site. |
| EVSP.Title | String | The title of the SharePoint document. |
| EVSP.Version | String | The version of the SharePoint document. |

Custom Enterprise Vault properties for Compliance Accelerator-processed items

[Table C-5](#) lists the custom properties that are defined in Enterprise Vault for the items that the Compliance Accelerator Journaling Connector has processed.

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

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

Troubleshooting

This appendix includes the following topics:

- [Vault stores not displayed](#)
- [Incorrect results when searching by message type in archives that Enterprise Vault 4.0 or earlier has indexed](#)
- [Search returns unexpected results](#)
- [Issues with analytics facilities after you install SQL Server 2008](#)
- [Custodian Manager lets you synchronize multiple custodians with the same Active Directory account](#)
- [Errors when exporting items](#)
- [Synchronization errors after you rename the SQL Server computer](#)
- [Performance counter errors when the Accelerator Manager service starts](#)
- [SQL Service Broker warning when restoring a customer database to a different server](#)
- [Issues with reports](#)

Vault stores not displayed

In those areas of the Discovery Accelerator client where you can select the vault stores in which to conduct searches, the absence of vault stores may indicate that the Enterprise Vault Directory service is not running. If this is the case, try starting the service. Ensure also that the same version of Enterprise Vault is running on the Discovery Accelerator and Enterprise Vault servers.

Incorrect results when searching by message type in archives that Enterprise Vault 4.0 or earlier has indexed

If some Enterprise Vault archives in your site contain messages that Enterprise Vault 4.0 or earlier has indexed, you may find that any searches by message type that you conduct with Discovery Accelerator do not return the expected results. This issue arises because earlier versions of Enterprise Vault did not add information to messages about the message type. The issue does not affect older archives whose indexes you have rebuilt with Enterprise Vault 5.0 or later.

You can resolve this issue by setting two configuration options in Discovery Accelerator. These options specify the date on which you first installed or upgraded to Enterprise Vault 5.0 or later, and the date on which Enterprise Vault archived the oldest available data.

To specify the installation and oldest archived item dates in the Discovery Accelerator database

- 1 Click the **Configuration** tab in the Discovery Accelerator client, and then click the **Settings** tab.
- 2 Expand the **System** section to show the available options.
- 3 In the **Enterprise Vault Oldest Archived Item Date** row, click the **Value** column.
- 4 Select the date on which Enterprise Vault archived the oldest available data.
- 5 In the **Enterprise Vault V5 Installation Date** row, click the **Value** column.
- 6 Select the date on which you first installed Enterprise Vault 5.0 or later.
- 7 Click **Save**.

If the oldest archived item date and V5 installation date are the same then, when you enter the criteria for a search, you can specify the message type without also specifying a start date. However, if the oldest archived item date is earlier than the V5 installation date, you can only specify the message type if you specify a start date that is on or after the V5 installation date.

Search returns unexpected results

Symantec Support may request a search criteria file if you report a problem with searches that return unexpected results.

To generate the search criteria file

- 1 Click the **Configuration** tab in the Discovery Accelerator client, and then click the **Settings** tab.
- 2 Expand the **Diagnostics** section to show the available options.
- 3 In the **Save Search Criteria** row, check the option in the **Value** column.
- 4 Click **Save**.
- 5 Restart the Enterprise Vault Accelerator Manager service on the Discovery Accelerator server.
- 6 Rerun the searches.

On the Discovery Accelerator server, Discovery Accelerator creates a file that is called `Criteria_SearchID.txt` in the `SearchCriteria` subfolder of the Discovery Accelerator program folder. If the folder contains several files, you can identify the associated searches by hovering the mouse pointer over the search names in the Discovery Accelerator client.

Issues with analytics facilities after you install SQL Server 2008

Installing SQL Server 2008 can have an effect on the analytics facilities in Discovery Accelerator.

Full-text search indexing is disabled by default in SQL Server 2008

After you install SQL Server 2008, analytics features such as automatic categorization and search within a case review set may not work properly. This is because SQL Server 2008 does not perform full-text search indexing by default. To use full-text search indexing, you must configure the SQL Full-text Filter Daemon Launcher service appropriately.

To enable full-text search indexing in SQL Server 2008

- 1 On your SQL Server computer, double-click the **Administrative Tools** applet in Control Panel.
- 2 Double-click **Services**.
- 3 Right-click **SQL Full-text Filter Daemon Launcher**, and then click **Properties**.
- 4 Change the startup type to **Manual**, and then click **OK**.

- 5 See the following article on the Microsoft Web site for guidelines on how to set the service account for full-text search:
<http://msdn.microsoft.com/en-us/library/ms345189.aspx>
- 6 If you still cannot perform full-text search indexing, ensure that you have installed both of the following:
 - SQL Server 2008 Service Pack 1. To obtain this service pack, go to the following page of the Microsoft Web site:
<http://www.microsoft.com/downloads/details.aspx?FamilyID=66ab3dbb-bf3e-4f46-9559-ccc6a4f9dc19&displaylang=en>
 - Cumulative update package 1 for SQL Server 2008 Service Pack 1. To obtain this package, go to the following page of the Microsoft Web site:
<http://support.microsoft.com/?kbid=969099>

Effect of new word breakers in SQL Server 2008

SQL Server 2008 includes word breakers for more than 50 languages, a number of which also exist in SQL Server 2005. The function of these word breakers is to identify individual words by determining where word boundaries exist, based on the lexical rules of the language. For the following languages, there are differences between the word breakers in SQL Server 2005 and those in SQL Server 2008:

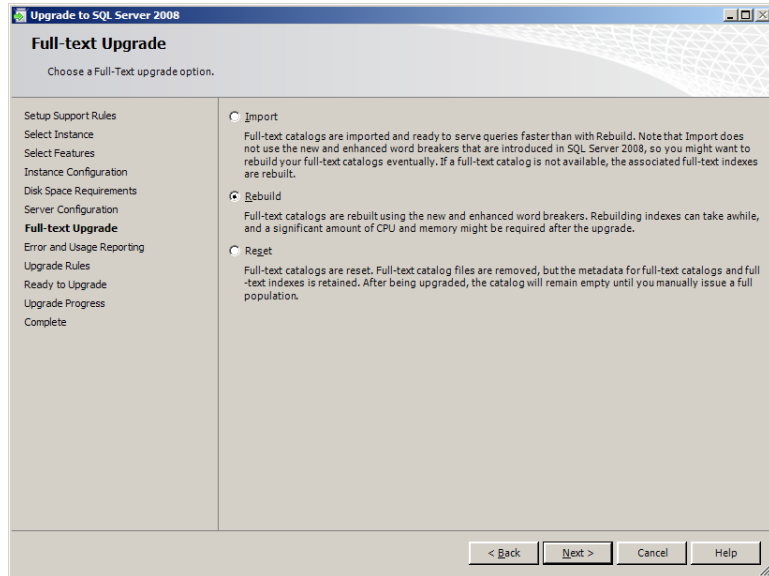
- | | | |
|-------------|------------------------|--------------------|
| ■ Arabic | ■ Indonesian | ■ Romanian |
| ■ Bengali | ■ Italian | ■ Russian |
| ■ Bulgarian | ■ Japanese | ■ Serbian Cyrillic |
| ■ Canada | ■ Latvian | ■ Serbian Latin |
| ■ Catalan | ■ Lithuanian | ■ Slovak |
| ■ Croatian | ■ Malay | ■ Slovenian |
| ■ Dutch | ■ Malayalam | ■ Spanish |
| ■ French | ■ Marathi | ■ Swedish |
| ■ German | ■ Neutral | ■ Tamil |
| ■ Gujarati | ■ Norwegian | ■ Telugu |
| ■ Hebrew | ■ Portuguese | ■ Ukrainian |
| ■ Hindi | ■ Portuguese Brazilian | ■ Urdu |
| ■ Icelandic | ■ Punjabi | ■ Vietnamese |

The consequence of this is that, after upgrading from SQL Server 2005 to SQL Server 2008, you may notice some differences in the results when you search for words and phrases in analytics-enabled cases.

If you have any analytics-enabled cases then, when you upgrade to SQL Server 2008, we recommend that you choose the option to rebuild the full-text search

indexes. [Figure D-1](#) shows the required option in the SQL Server 2008 installation program.

Figure D-1 The Full-text Upgrade page of the SQL Server 2008 setup wizard



The **Rebuild** option causes SQL Server 2008 to rebuild the full-text catalogs using the new word breakers, and so helps to avoid semantic inconsistency issues. Note that rebuilding the full-text search indexes can significantly prolong the upgrade process.

See the following article on the Microsoft Web site for more information on SQL Server 2008 full-text search indexing:

<http://technet.microsoft.com/en-us/library/cc721269.aspx>

Custodian Manager lets you synchronize multiple custodians with the same Active Directory account

Custodian Manager permits you to set up multiple custodians whose details are synchronized with the same Active Directory account. This can lead to unpredictable results when synchronization occurs.

For the best results, ensure that each custodian is synchronized with a unique Active Directory account.

Errors when exporting items

If you receive the following error message when you export items, the version of the file `mapisvc.inf` on the Discovery Accelerator server may be incorrect.

```
Error      Failed to write the file:
The EVPSTAPI COM object has not been initialized
```

To fix MAPI problems

- 1 In Windows Explorer, browse to the `%windir%\system32` folder on the Discovery Accelerator server.
- 2 Double-click `fixmapi.exe` to run the MAPI repair tool. Note that this tool does not appear to do anything when you run it.
- 3 Restart the Discovery Accelerator server.
- 4 Test whether the problem has been fixed.

If you cannot fix the problem by running FIXMAPI.EXE

- 1 In the `%windir%\system32` folder on the Discovery Accelerator server, rename the existing `mapisvc.inf` file.
- 2 Copy the version of `mapisvc.inf` that comes with Microsoft Outlook to the `%windir%\system32` folder. This version is typically in the following folder:

```
C:\Program Files\Common Files\System\MSMAPI\locale_ID
```

where *locale_ID* is the numeric identifier for your locale. The following table lists some common locale identifiers.

| | | | |
|---------------------|------|------------|------|
| Chinese Simplified | 2052 | Hebrew | 1037 |
| Chinese Traditional | 1028 | Italian | 1040 |
| Danish | 1030 | Japanese | 1041 |
| Dutch | 1043 | Portuguese | 2070 |
| English U.S. | 1033 | Spanish | 3082 |
| French | 1036 | Swedish | 1053 |
| German | 1031 | | |

- 3 Restart the Discovery Accelerator server.

Synchronization errors after you rename the SQL Server computer

If you rename the SQL Server computer, the following message may appear in the event log of the Discovery Accelerator server when the Discovery Accelerator database synchronizes with SQL Server:

Cannot add, update, or delete a job (or its steps or schedules) that originated from an MSX server. The job was not saved.

For more information on this problem and guidelines on how to resolve it, see the following article in the Microsoft Knowledge Base:

<http://support.microsoft.com/?kbid=281642>

You may also be able to fix the problem by running a script on the SQL Server computer.

To fix synchronization errors by running a SQL script

- 1 Connect to your SQL Server with Query Analyzer.
- 2 Type the following command to access the msdb database:

```
USE msdb
```

- 3 Run the following script:

```
DECLARE @srv sysname SET @srv = CAST(SERVERPROPERTY('server_name')
AS sysname) UPDATE sysjobs SET originating_server = @srv
```

where you must replace *server_name* with the new name of your SQL Server computer.

Performance counter errors when the Accelerator Manager service starts

When the Enterprise Vault Accelerator Manager service starts, the following error messages may appear in the event log of the Discovery Accelerator server:

```
Event Type:      Error
Event Source:    Accelerator Manager
Event Category:  None
Event ID:        41978
Description:     APP ATM - Error: deleting Performance Counters
Description:     Input string was not in a correct format.
```

```
Event                Type:Error
Event                Source:Accelerator Manager
Event Category:      None
Event ID:             41980
Description:          APP ATM - Error: Creating Performance Counters
Description:          Input string was not in a correct format.
```

For more information on this problem and guidelines on how to resolve it, see the following article in the Microsoft Knowledge Base:

<http://support.microsoft.com/?kbid=300956>

SQL Service Broker warning when restoring a customer database to a different server

SQL Server may record the following warning message in the event log if you restore a Discovery Accelerator customer database to a different server than that on which it originally resided:

```
Service Broker needs to access the master key in the database
'database_name'. Error code:25. The master key
has to exist and the service master key encryption is required.
```

You can suppress this warning message by using the following SQL Server command to create a master key for the database:

```
CREATE MASTER KEY ENCRYPTION BY PASSWORD = 'password'
```

For more information, see the following article on the Microsoft Web site:

[http://msdn.microsoft.com/en-us/library/aa337551\(SQL.90\).aspx](http://msdn.microsoft.com/en-us/library/aa337551(SQL.90).aspx)

Issues with reports

A number of issues can arise when you generate, print, or export reports from the Discovery Accelerator client.

You receive the message "An error occurred creating the report" when you try to generate reports

If you receive the following message when you try to generate a report, it is possible that the report templates were uploaded to the SQL reporting server with the wrong logon credentials:

An error occurred creating the report

```
An error has occurred during report processing ---> ...
Cannot impersonate user for data source 'CustomerDatabase'. --->
Logon failed. ---> Logon failure: unknown user name or bad password.
(Exception from HRESULT: 0x8007052E)
```

The Accelerator Manager Web site does not authenticate the logon credentials that you enter when you upload the templates to the reporting server. Consequently, if you omit the credentials or enter the wrong ones, account validation issues occur when you subsequently generate a report.

For guidelines on how to upload the report templates to the SQL reporting server, see the *Installation Guide*.

Prompt to install SQL Server when printing a report for the first time

When you print a report for the first time from the Discovery Accelerator client, a Security Warning window prompts you to install Microsoft SQL Server. This is a known issue in Microsoft SQL Server Reporting Services, which requires you to download an ActiveX control for client-side printing of reports. To resolve this issue, enable the setting **Download signed ActiveX controls** in Internet Explorer so that you can install the required control.

To change the security settings in Internet Explorer

- 1 In Microsoft Internet Explorer, click **Tools** > **Internet Options**.
- 2 Click the **Security** tab.
- 3 Select the **Trusted sites** zone, and then click **Sites**.
- 4 Type the URL of the SQL reporting server.
- 5 Click **Add**, and then click **Close**.
- 6 Click the **Custom level** button.
- 7 Scroll to the **ActiveX controls and plug-ins** node.
- 8 Click **Enable** for **Download signed ActiveX controls**, and then click **OK**.

Scripts errors when printing reports from the Discovery Accelerator client in SQL Server 2005 SP2 environments

In a Discovery Accelerator environment where you are running SQL Server 2005 SP2, the following error message may appear when you print reports from the Discovery Accelerator client:

An error has occurred in the script on this page.

...

Could not complete the operation due to error 8007f305.

You can resolve this issue by upgrading to SQL Server 2005 SP3.

Reports that you export as CSV may not open properly in Microsoft Excel

By default, SQL Reporting Services exports CSV files with Unicode encoding rather than ANSI encoding. The data in a Unicode-encoded CSV file does not tabulate properly when you open it in Microsoft Excel.

To work around this problem

- 1 Locate the file `rsreportserver.config` in the SQL Reporting Services installation folder.
- 2 Open the file in a text editor such as Windows Notepad.
- 3 Comment out the following text block by enclosing it in the marks `<!--` and `-->`:

```
<Extension Name="CSV" Type="Microsoft.ReportingServices.Rendering.CsvRenderer.CsvReport, Microsoft.ReportingServices.CsvRendering"/>
```

- 4 Add the following text block:

```
<Extension Name="CSV" Type="Microsoft.ReportingServices.Rendering.CsvRenderer.CsvReport, Microsoft.ReportingServices.CsvRendering">
<Configuration>
  <DeviceInfo>
    <Encoding>ASCII</Encoding>
  </DeviceInfo>
</Configuration>
</Extension>
```

- 5 Save and close the file.

After you have edited the configuration file, SQL Reporting Services ignores any Unicode characters that were stored in the initial report.

Garbled Japanese characters when exporting reports in Acrobat format

If the Japanese characters in a Discovery Accelerator report are garbled when you export the report in Acrobat (PDF) format, you may be able to resolve the problem by taking the following steps:

- Ensure that you have installed the supplemental files for East Asian languages on the SQL reporting server. To do this, open Regional and Language Options in Control Panel and then, on the Languages tab, check **Install files for East Asian languages**.
- Install version 5.00 or later of the Microsoft Gothic font on the SQL reporting server. This version is supplied with Windows Vista and Windows 7, but most other versions of Windows come with version 2.30. See this page for more information:
<http://www.microsoft.com/typography/fonts/font.aspx?FMID=1610>
- Upgrade to SQL Server Reporting Services 2008.

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