

Veritas eDiscovery Platform™

User Guide

10.3

Veritas eDiscovery Platform™: User Guide

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Veritas Technologies LLC
2625 Augustine Drive
Santa Clara, CA 95054
<http://www.veritas.com>

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User Guide

The goal of this book is to help you use the Veritas eDiscovery Platform to perform basic and advanced searches, view search results, and manage messages and other documents using folders and tagging.

This section contains the following sections:

- [“About This Guide” in the next section](#)
- [“Revision History” on page 7](#)
- [“Technical Support” on page 11](#)
- [“Documentation” on page 11](#)
- [“Documentation Feedback” on page 11](#)

About This Guide

This guide is intended for end users, system administrators, decision makers, and anyone who is interested in understanding how the Veritas eDiscovery Platform works. Use this guide to learn key user and reviewer-related tasks. For information about administering the system, refer to the System Administration Guide.

Revision History

The following table lists the information that has been revised or added since the initial release of this document. The table also lists the revision date for these changes.

Revision Date	New Information
September 2024	• Updated version for release 10.3.
August 2022	• Updated version for release 10.2. • Added information about the Sample option of bulk tagging and updated the Tag menu screenshot. See “Bulk Tagging” on page 137. • Added information about the Sample option of bulk folder and updated the screenshot. See “To copy, move, or remove items in folders” on page 147.

Revision Date	New Information
July 2022	- Added the content and updated images related to filter Refresh option that is added in UI for Analysis & Review tab. See “Things Users and Reviewers Need to Know” on page 19. - Updated the images and content related to the missing options on 'View Internet Headers' panel—'Locators with hits only' and 'All locators', see “To search email headers” on page 108 (step 3 and 4 of the procedure). - Removed the references to Concept Search and Predictive Coding in the document. - Removed the Score column from the image related to Tag Event History search result. See “Using the Tag Event History Screen” on page 139. - Updated the View Log icons in images throughout the document. - Under Production Folder user interface section, updated the refresh button in the Edit Production Folder image.
March 2022	Updated the content as per UI change in Analysis & Review tab for 508 compliance.
December 2021	- Updated version for release 10.1 - Added content to stop highlighting the terms or patterns specified in Persistent Hit Highlighting, see “Searching within documents in Native View” on page 166. - Added content for Displaying redaction reason codes for fully redacted documents. See, “Displaying redaction reason codes for fully redacted documents” on page 207
July 2021	Added information on Persistent Hit Highlighting.
May 2021	Updated the Appendix C: Regular Expressions Support.
March 2021	- Edits in the sections related to Redaction and Annotations. - Minor edits
October 2018	- Added information for email job notifications through user preferences. See “Changing Your Account Preferences and Password” on page 15. - Minor edits
March 2018	Added information related to IPv6 support
December 2017	- Bulk redaction - Information Classification - Annotation - Preset Reason Codes
June 2017	Minor edits
July 2016	Branding and minor edits
August 2015	- Print - export location option added - Add support for search/review of Enterprise Vault journal emails (EML) - Update Find Similar Histogram display - Remove support for IE8, add support for IE11 - Remove Rights Management Guide

Revision Date	New Information
March 2015	• Image accessibility • Branding and minor edits
October 2014	• Item Level View enhancements • Document print and log operate at the item level • New user interface navigational changes • RMS information for Message flag filters added • Branding, updated graphics and major edits
November 2013	• Corrected Freeform Search syntax example • Corrected Nested Proximity Search syntax example • Changed PDF Print options to show those checked by default • Updated screen shots showing topic searches • Updated Advanced Search to show message time can be entered (Dodd-Frank) • Changed email header search details about exact time formats honored
June 2013	• Reporting enhancements – Search reports are in XLS (formerly CVS) format for improved excel filtering – New Search Hit Report • Performance enhancement allows disabling of Find Similar • Tag Search now includes attachment logic • Image remediation • Support for search/review of Enterprise Vault journal envelope messages • Separate tagging of attachments enhancements • Email Header Search • Minor revisions and graphic updates
Sept 2012	• Attachment-level tagging now available • Native Imaging and large document caching • Release template updates and edits
May 2012	• 7.1.1. Fix 1 Patch: Added appendix for legacy topics support of pre-7.0 upgraded cases.
March 2012	• Advanced Search Report enhancements including: – Keyword search results and count totals are now divided up into more specific data sources that include: Emails, Loose files, Documents, Attachments and Reviewable items. – New export capability which allows users to export the Keywords section report in an easy-to-read format to Microsoft Excel
Feb 2012	• Review, redaction, production features affected by new LIHO (Low-In/High-Out) billing model option (when applied to a case).

Revision Date	New Information
Nov 2011	• Review Mode Detail view - attachment search and download • Bulk Tag/Folder event comments enhancements • Advanced Search enhancements including: – Keyword Search field auto-fix text (proper case formatting) – search by Custom Attributes (from third party load file import) – search by Document Size • Document Size filtering
May 2011	• Concept Search functionality • Compare differences in document selected from Related Items in Review Mode
Feb 2011	• Scalable Folder Management and user interface enhancements • Search, export, and production enhancements: – Search for multiple production numbers at once – Search for documents processed with OCR – Export filter for failed documents – Production premediation report
Dec 2010	• Find Similar Feature enhancements: – View Histogram/Set Threshold – Show Primary document (on which similar items are based) • Participant Search Feature - Search by participant, email, and domain • (Minor revisions and graphics enhancements throughout)

Technical Support

Technical Support maintains support centers globally. All support services will be delivered in accordance with your support agreement and the then-current enterprise technical support policies.

For information about our support offerings and how to contact Technical Support, visit our website:

<https://www.veritas.com/support>

You can manage your Veritas account information at the following URL:

<https://my.veritas.com>

If you have questions regarding an existing support agreement, please email the support agreement administration team for your region as follows:

Worldwide (except Japan)

CustomerCare@veritas.com

Japan

CustomerCare_Japan@veritas.com

Documentation

Make sure that you have the current version of the documentation. The latest documentation is available from:

- **Documentation** link at the bottom of any page in the Veritas eDiscovery Platform landing page.
- **Veritas Technologies LLC Products Web site:** <https://www.veritas.com/product/a-to-z>

Documentation Feedback

Your feedback is important to us. Suggest improvements or report errors or omissions to the documentation. Include the document title, document version, chapter title, and section title of the text on which you are reporting. Send feedback to:

eDiscovery.InfoDev@veritas.com

You can also see documentation information or ask a question on the Veritas community site.

<https://vox.veritas.com/>

Getting Started

This chapter describes the Veritas Systems Software and the basic user tasks that you can perform.

- *“Logging In and Out of the Application” in the next section*
- *“Changing Your Account Preferences and Password” on page 15*
- *“Understanding the User Interface” on page 17*
- *“Completely revamped user interface for Analysis & Review tab” on page 18*
 - *“Things Users and Reviewers Need to Know” on page 19*

Logging In and Out of the Application

Browser Considerations

Web Browser Options

You can access the appliance from any Windows-based PC or Apple Macintosh using Microsoft Edge (Chromium), Google Chrome and Apple Safari. Any version of Internet Explorer is not supported starting release 10.0.

Configuration

Running multiple sessions in a single tabbed browser window is not supported.

To log in

1. Determine whether you are a Local user or an Enterprise user. Your administrator should provide you with log in information.
 - Local users should receive a username and password.
 - Enterprise users may receive browser configuration details.
2. If you are a local user:
 - A. Enter the name or IP address (IPv4 or IPv6 format) of a Veritas eDiscovery Platform in your browser.
http://<ServerName> or http://<IP address>
The login screen displays.
 - B. Enter your user name and password and click **Login**.
Your administrator emails this information to you.
 - C. Go to step 4.
3. If you are an Enterprise user who is logging in for the first time:
 - A. Add the supplied fully-qualified domain name (FQDN) to the browser’s list of secure websites. Example: CompanyNameAppServer.corp.com

- B. Enter the name or IP address (IPv4 or IPv6 format) of a Veritas eDiscovery Platform in your browser.

http://<ServerName> or http://<IP address>

The interface displays.

Note: After you add the FQDN to your browser, you only need to enter the URL to be automatically logged in.

4. If you have access to multiple cases you will be prompted to select a case immediately after logging in. Select a case.

Note: If your preferences are set to save your session when you log out, when you log back in you might be prompted to resume your last session. You will not be prompted if you chose to always automatically resume the previous session.

To open another browser window, start a new browser session and log in. Do not use **CTRL+N** to open multiple windows for the same Veritas eDiscovery Platform session.

To log out

To log out, click **Logout** at the top of the screen.

When you log out while viewing search results or reviewing documents in the Analysis & Review module, you have the option to save your place. The next time you log in, you have the option to return where you left off or to log in to the default screen.

Note: Inactive users are logged out automatically after a configurable amount of time (default is 30 minutes). If your session times out, you will be returned to your current state (1) if you have previously logged out and specified that you want your search state to be saved and (2) if you do not want to be prompted to save the state again.

Changing Your Account Preferences and Password

You can update your account preferences and password any time you are logged in to the user interface.

Note: You can change your password through the account preferences interface or through the Change password interface.

To update account preferences

1. Click your user name at the top of the screen.

A drop-down menu displays.

2. Click **Preferences...**

Change Preferences

Make any desired changes and then click "Save".

User Name	superuser
Full Name	superuser
Role	System Manager
Email Address	
Send email after my jobs complete	☐ Yes ☒ No
Send emails for failed jobs to	
Show Infobubbles	☒ Yes ☐ No (expert user)
Display Microsoft Office documents	☒ In browser (Office 2003) ☐ In desktop application (Office 2007)
Resume search state on login enabled	☒ Yes ☐ No

Change password... Save Close

3. Update any of the following information:
 - Email address
 - Show InfoBubbles
 - Display Microsoft Office documents
 - Resume search state on login enabled
4. Starting with 9.1, you can choose to get notified for failed and completed jobs by setting the following:
 - **Send emails after my jobs complete:** By default, this option is disabled. You can select **Yes** to receive email notifications for the jobs that you have initiated. The email notification includes information on the job status, job description, and case name. Email notification is not sent for the status change jobs (such as Stopped, Start, and so on). Emails are not sent for jobs that take less than 5 minutes.

- **Send emails for failed jobs to:** Provide the email addresses (separated by a comma or semicolon) where you wish to receive email notifications for failed jobs. Notifications are sent only if the job fails. The job log is attached to the email.
5. To change your password, click **Change Password...**
The Change Your Password dialog box displays. Type the old and new passwords in the fields provided, and click **OK**.
 6. Click **Save**.

To change your password

1. Click your user name at the top of the screen.
A drop-down menu displays.
2. Click **Change password...**
The **Change Your Password** dialog box displays.
3. Type the requested information.
4. Click **OK**.

Understanding the User Interface

When you log in to the Veritas Systems Software, provided you have been granted access to more than one case, you are asked to select the case on which you would like to work. After you select your case, the following modules on the top navigation bar are displayed (depending on your user role):

- **Analysis & Review**— Provides a broad set of tools to analyze documents and quickly drill down to the most relevant information. The **Analysis & Review** module includes views of discussions, topics, files (email attachments and loose files), and tagging events. Also provides a visual summary of case and tag status through the Dashboard tab.
- **Case Home**—Provides access to case details on custodians, users, data analytics, redaction sets, jobs, logs and job scheduler. Also provides access to reports that can be exported.

The top of the screen shows your login name and the **Jobs**, **Help**, and **Logout** links. To the left, the navigation bar also includes a drop-down menu to change your case. When you export documents or print them to Portable Document Format (PDF) files, an icon displayed next to the Jobs link indicates that the files are ready to be downloaded.

Your access privileges depend on the “role” associated with your account.

Note: If after upgrade you can no longer access a case that is in your workflow, you may need to have the role associated with your user account changed. Please contact your administrator. For more information about user roles, refer to ["Managing User Accounts" in the System Administration Guide](#).

The Veritas Systems Software provides the following navigational aids:

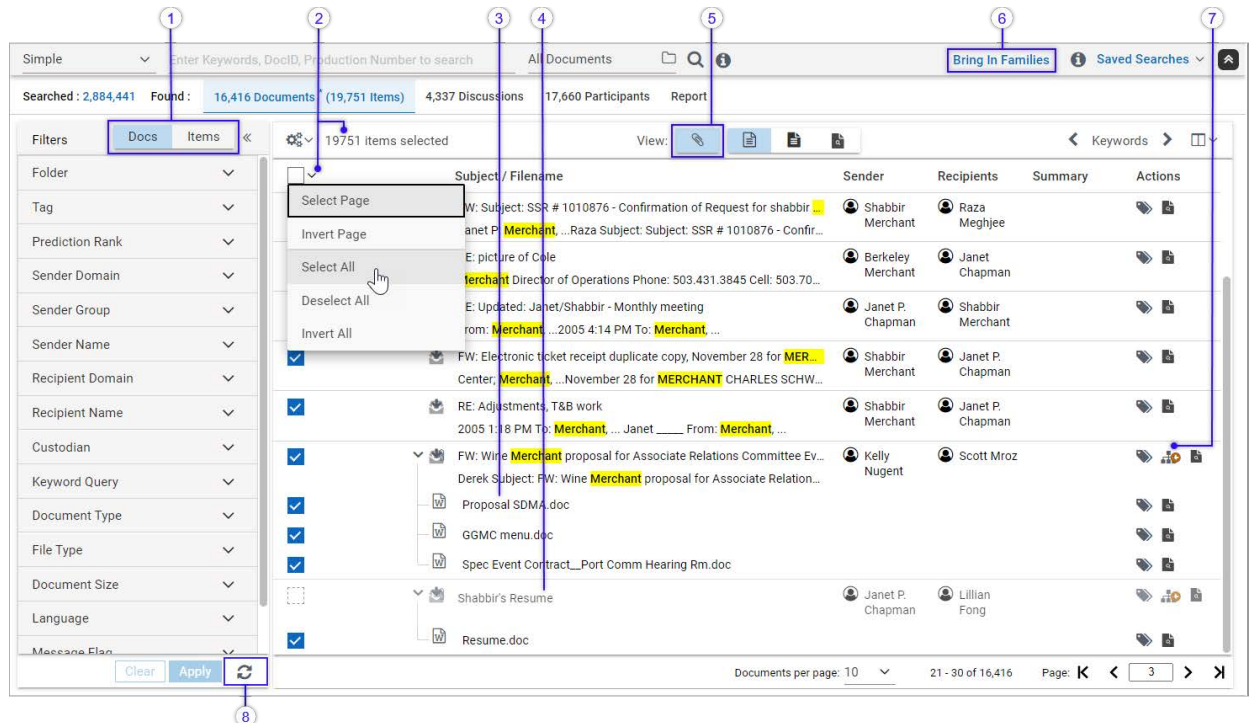
- The modules and links at the top of the window guide you to appropriate task and workflow screens.
- The side panel filters search results, displays previous searches, shared saved searches and private saved searches, and save searches.

Completely revamped user interface for Analysis & Review tab

eDiscovery Platform release 10.1.2 provides a fresh look to Analysis & Review tab UI with following added features:

- Compliant with Section 508 to allow visually challenged users to navigate using a screen reader
- Accelerates linear review with faster loading of native viewer, Tags, and Related Items panel
- Auto-save tags or markup (redactions/annotations) when navigating to next document
- Plays audio or video files without having an audio license
- Re-imagined advanced search that allows an administrator to quickly identify what to search
- Add or Remove columns from the search results interface

Things Users and Reviewers Need to Know



No.	Description	Purpose
1	Docs Items Filter Counts	Quickly switch between any of the ready-to-use search filters with a consistent unit of measurement across your search results to view either Document Family or Item Level counts. You can toggle between Document Family and Item-Level search filter counts to easily display only the filter counts that interest you. See “Documents and Items Counts For Search Filters” on page 61. Note: Using the Docs Items toggle does <i>not</i> alter the underlying filter behavior (what unit of measure the product uses to determine and derive the filter count). This means, for example, that filters that derive their counts at document level (such as Message Flag, Document Size, and Export Error filters) will continue to operate at the document level regardless of the Docs Items toggle selection. The same applies for filter counts based on item level counts.

No.	Description	Purpose
2	Power Selector	Preserves your item (loose files, messages, embeddings and attachments) selections when your case search results spans multiple pages. The Power Selector remembers your selections on each page so that you can continue to browse through multiple pages of results, return to a previous page and still have your previous selections preserved. Eliminates the tedious task of having to mark and remember previous selections as you navigate back and forth through many pages of results. Note: Power Selector is <i>not</i> implemented for Discussions (list of attachments). Here are the available modes: Select Page— selects all results shown on current page Select ALL— selects all the search results across all pages Deselect All— deselects all search results across all pages Invert All— selects the opposite of current content selections. This can be useful when after tagging documents in the selected document results (hits), you want to easily identify and tag all the non-selected items with an opposing tag. <NNN> items selected — located to the right of the Actions menu, it displays the total number of items selected with the Power Selector.
3	Attachment on its own row	On the main Documents (Items) tab page, attachments display in their own row and are no longer nested within the parent message hierarchy. Partial family hits are displayed in a flat view (all attachments are at the same level) of attachment hits. Complete families are displayed in a hierarchical view (all child entries are indented).
4	Non-hit parent items grayed out	Only items that are hits are displayed. Non-hit document parents are appropriately grayed out. This allows you to easily see and work with only relevant documents or hits.
5	Toggle Attachments View	Click on the  Attachment Toggle view icon to expands or collapses display of all attachment rows.
6	Bring in families	Select this option when you want to add every member of every document family to your results. This is useful when attachments or the parent match the search criteria and you want to include every other member of the document families in your result and filters. You also have a similar option from the Advanced Search page. From the Advanced Search page, you can select the Bring in document families check box to add every member of every document family to your search results. Note: You can also bring in family members on a per item basis (see next entry Bring in Complete Family).

No.	Description	Purpose
7	Bring in Complete Family	Click on Bring in the family  icon to bring in the complete family for a particular item. Once the family is brought in, the icon changes to the family brought in . Note: This option is grayed out and not available if filters have been applied (by using either the Apply button at the bottom of the Filters menu or clicking on a filter to view results).
8	Refresh	The filter Refresh option is enabled to indicate when search filters are out of date and need updating. To update the search filters, click the enabled filter Refresh button. For example, filter Refresh is useful when you are viewing your search results at the item level and decide, for context or other reasons, that it would be helpful to bring in complete family documents for a single item or include all the family documents for all the items in your search results. Since both of these actions will affect the current filter counts, the filter Refresh button is enabled signaling the need to click it for an update.

Search

This chapter describes the eDiscovery Platform search software and the basic user search tasks that you can perform.

Running Searches

- [“Performing Searches” in the next section](#)
 - [“Overview of Search Options” on page 24](#)
 - [“Basic Searches” on page 27](#)
 - [“About Advanced Searches” on page 27](#)
- [“Working with Previous and Saved Searches” on page 44](#)
- [“Setting Up Search Jobs” on page 49](#)

Viewing Search Results

- [“Viewing Search Results” on page 50](#)
 - [“Using the Documents Screen” on page 50](#)
 - [“Version 8.0 Enhancements” on page 50](#)
 - [“Understanding Search Result Statistics” on page 57](#)
 - [“Changing Your Search Results View” on page 58](#)
 - [“Nested Email Attachments in Search Results” on page 59](#)
- [“Filtering Search Results” on page 61](#)
 - [“Documents and Items Counts For Search Filters” on page 61](#)
- [“Classification Information” on page 69](#)

Reporting Search Results

- [“Using the Search Reports Screen” on page 71](#)
 - [“Exporting Search Report Results” on page 74](#)

Performing Searches

For more information about performing searches, refer to the following topics:

- [“Overview of Search Options” in the next section](#)
- [“Basic Searches” on page 27](#)
- [“About Advanced Searches” on page 27](#)

Overview of Search Options

There are two types of searches:

- **Basic search** — A basic search returns all documents (messages, attachments, and other files) that contain any of the words entered in the search box. Basic searches search the following fields: Senders, Recipients, Email subject line, Email contents, Attachment names, and Attachments.
- **Advanced search** — An advanced search allows you to search for specific phrases, dates, header information (such as sender or subject), Bcc and distribution list information contained in Enterprise Vault Journal messages in MSG and EML format, identification information (such as Custodians and Document identifier), and specific tag values. You can also use an advanced search to find email attachments or other files, search for comments added with the tagging feature, or enter freeform queries to do more complicated searches.

Search Entry Guidelines

Search text consists of alphanumeric characters. Most punctuation and special characters are ignored. Searches are not case sensitive. All common languages are supported. Basic searches are stemmed and thus the results of basic searches include text variations, such as singular and plural instances of the specified nouns. Use an advanced search to run a literal search that will not find text variations.

The following table lists the search matching options and examples that are supported in Basic search. These searches are also supported in the **Any of these words** field in Advanced search.

Search Matching Options and Examples

Option	Example	Results
Alphanumeric string	energy policy	A match occurs on "energy" or "policy."
Logic Operations	energy AND policy	A match occurs on documents containing both energy and policy. The system also supports the use of OR, NOT, + and - operators and grouping using parenthesis in Basic search. See the section "Freeform Searches" on page 98 for more details on Logic Operators and Grouping. Note: All logic operations, such as AND, must be capitalized. Otherwise, a search containing lowercase "and" will search for the term "and" (rather than using it as a logic operator). When performing searches, the system treats messages and attachments as separate documents. With an (uppercase) AND search, a match occurs for a message only if all of the words are in the message or in an attachment. A match does not occur if the words are split between the message and an attachment.

Search Matching Options and Examples (Continued)

Option	Example	Results
Phrase	"energy policy"	A match occurs only on "energy policy." Note: Phrase or proximity searches entered in Basic search will be run as stemmed searches and thus will match "energy policies" as well as "energy policy." To perform a literal search that will only find "energy policy," enter this query in the Any of the words field in Advanced search and do not check "Search all variations of key words."
Proximity	"energy policy"~5 energy w/5 policy	A match occurs when there are five or fewer intervening terms between "energy" and "policy" irrespective of whether "energy" appears before "policy" or "policy" appears before "energy." Using NOT or "-" excludes the term or phrase that follows. Proximity searches are run on all search fields (e.g. Body, Subject, Quoted Text, Attachments). Note: Proximity searches do not span multiple search fields. All terms must be contained within the same field.
Nested Proximity	"energy policy" w/5 ("alternative energy" w/10 "solar power")	Nested proximity searches function in the same manner as proximity searches. Nested search terms are grouped with parentheses.
Wildcard	polic*	A match occurs on all terms that begin with "polic." the system supports both * and ? wildcard characters. See the section "Wildcard Searches" on page 83 for more details on how to run wildcard searches.

Language Support

The platform supports searches in all common languages.

When performing searches with languages that use characters, such as Chinese, Japanese and Korean, note the following:

- If you enter characters with no spaces, such as 北京中国 (Beijing China), the system will interpret this as a phrase search and will find documents containing these characters in the exact order you specify.
- To search for documents containing ANY of these characters, enter the characters with spaces or using explicit OR operators. For example, 北京 中国 or 北京 OR 中国 will search for Beijing OR China.
- To search for documents containing ALL of these characters but in no particular order, enter the characters using explicit AND operators. For example, 北京 AND 中国 will search for Beijing AND China.

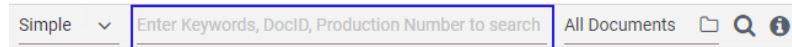
Note: Prior to eDiscovery Platform version 4.5, searches ignored common words, such as “and” and “the.” Cases created using pre-release 4.5 software will continue to ignore these stop words. Cases created using version 4.5 and later allow you to search for these words. (Treatment of punctuation characters was also updated in Release 4.5.)

For more information on searches in non-English languages, see [“Non-English Language Searches” on page 112](#). For further details on multi-language handling and processing, refer to the *Case Administration Guide*.

Basic Searches

To perform a basic (Simple) search

1. Select **Simple** from the search-type list.
2. Enter a search term in the search box shown.



3. Select from the menu next to the search box to restrict the search by documents, folders, or both.

By default, **All Documents** is selected, and if your administrator has defined one or more folders, you can select any individual folder or **Any Folder**.

If you have access to all folders, you can also select **No Folder** to search only documents that have no associated folder.

Note: Leave the search box blank to retrieve all documents within the selected context (**All Documents**, **No Folder**, individual selected folder, or **Any Folder**).

4. Click **Search**  icon.

The search results are displayed on the Documents screen or on the screen under the **Analysis & Review** module where you enter the search.

For information about viewing search results, see [“Viewing Search Results” on page 50](#). To view just the email messages or loose files in the search results, or to filter the search results by folder, tag categories, sender names, or other criteria, see [“Filtering Search Results” on page 61](#).

Note: By default, all content and metadata fields of emails and files are searched.

About Advanced Searches

You can perform any of the following types of advanced searches:

- **Advanced Search** — Search on documents, keywords, identifiers, participants (file, email or domain properties by sender and/or recipient), email properties, file properties, or tags. See [“Standard Advanced Searches” on page 28](#).
- **Freeform Search** — Search for document content using text queries. This choice also includes all the standard advanced search options except keyword search. See [“Freeform Searches” on page 43](#).
- **Audio Search** - Search for spoken words or phrases in any media clip. See the Audio Search Guide for details.
- **Tag Event History Search** — Search for tagging events and comments on bulk tagging events. See [“Tag Event History Searches” on page 44](#).

The following guidelines apply specifically to standard advanced searches:

- Click the plus  icon to the left of a category to display all the search options. Click the minus  icon to the left of the category to hide the search options.
- In most cases, if you enter words in more than one keyword field, the search results include only documents that match all of the fields (AND match). For example, if you enter **energy** for “Any of these words” and **nuclear power** for “...and the exact phrase,” the search results include items that include the word “energy” and also include the phrase “nuclear power.”

Note: The only exception to this rule is in the **Any of these words** field in the file/attachment section of the Advanced Search screen. Searching for Words in the **Any of the words** field in the file/attachment section will return results independent of the **Keyword** search fields (**Any of these words**, **All of these words**, and **The exact phrase**). That is, words entered in this field are ORed with other words entered in the Keyword search fields. Words entered in this field are ANDed with all other Advanced search fields.

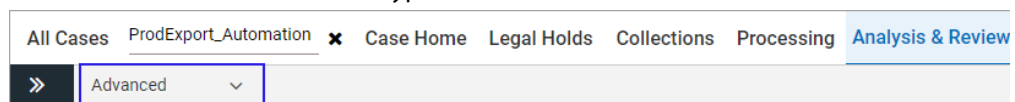
- Click the participant icon  on the right of any search line in the **Participants** section, which allows you to select participants that have been indexed. You can also use the Participants section to search documents by participant, email, or domain.
- Click the participant icon  on the right of the **Any of these words** field to open the search preview window that allows you to select stemmed or wildcard word variations.

See [“Advanced Search” on page 79](#) for further details about each type of search, and advanced searching.

Standard Advanced Searches

To submit a standard advanced search

1. Select **Advanced** from the search-type list.



2. To perform a standard advanced search, choose options in one or more of the available search categories, as described in the following table. For guidelines, see [“Search Entry Guidelines” on page 24](#).

Advanced Document Search Criteria

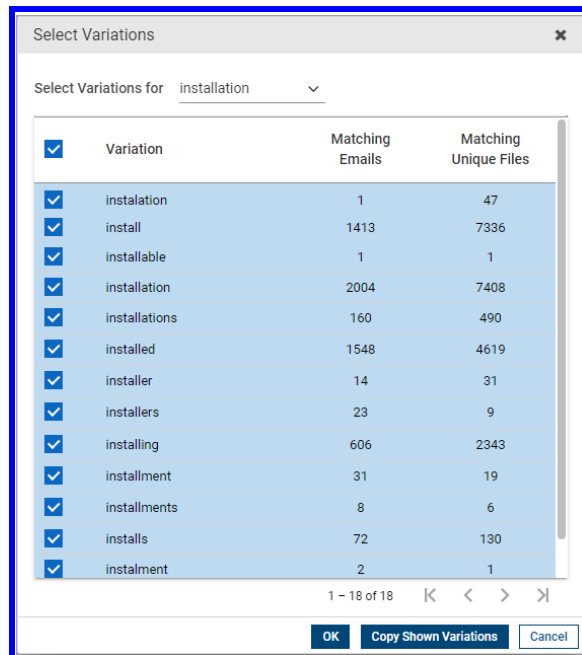
Criteria	Effect on Search
Item Type	
Document Type	Select check boxes to include item type, email and/or loose files in the search.
Dates	
Sent or last modified date (and time)	Finds documents that were sent or last modified on any date (default), no date, or within a date range. Select none to specify no sent or modified date, or within date range to specify a start and end date. For individual files, the sent date is the last-modified date. • To search for documents by date and time: As of version 7.1.4, users can create searches for documents sent or last modified at a specifiable time. Under the Last modified date field there is a pull-down menu: select Within Date Range. Selecting Within Date Range will default to a setting corresponding to the present date with a range of 12:00 AM to 11:59 PM. Type the time to search for in the Start Date field and the same time in the End Date field. The date and time entries will validate: entering incompatible values will cause the dates to display in red and the search will not run. Note: for upgraded cases, the document will come up on the date sent or last modified date, with a time ranging from 12:00 to 11:59 for that same day. It will not be possible to select more specifically than that.

Advanced Document Search Criteria (Continued)

Criteria	Effect on Search
Keywords Find documents containing...	
Any of these words	Finds messages, attachments, or other files that contain any of the specified words. This field supports the same searches that are listed in the Table , "Search Matching Options and Examples,". Use spaces or carriage returns to separate the words. For EV journal envelope messages, you can enter "sender and recipients" to include all participants present in the Journal fields. See "Journal Envelope Message Searches" on page 105. You can add additional Any of these words fields, or query rows, by clicking the plus  icon. A search with multiple query rows will find documents that match any of queries entered in these rows (OR search). Each query entered in a query row is reported on separately within the Search Report. See "Using the Search Reports Screen" on page 71. In addition, keyword query filters are created for each query that is entered in a query row. You can also copy a list of queries from another text-based application such as Notepad or Microsoft Word and paste it into the Any of these words field. A query row is created for each row of pasted text. To remove query rows, click the minus  icon. The system supports 100 query rows. (Alternatively, use the shortcut CTRL+ minus icon . A message appears prompting you to confirm removal of the last query row.) Note: Use all CAPS for keywords AND, OR, and NOT unless you want them treated as search terms. You can use this same functionality whenever you convert a concept search to a keyword search. The system allows you to automatically correct any text not entered in the proper case (for keywords not intended as search terms). For example, in the Any of these words field, if you enter: "investments" and "privacy" where and should be AND, a notification appears below the field with the Fix keywords  icon appearing in-line. Click the icon to auto-fix the case. Note: If the system determines that the search is large, the system automatically creates a job for the search and gives you the option of running the search in the background. Search jobs run in the Searches area in the Documents screen and are shown with a spinning magnifying glass icon. Completed search jobs have a grayed magnifying glass icon. For more information on search jobs, see "Setting Up Search Jobs" on page 49.

Advanced Document Search Criteria (Continued)

Criteria	Effect on Search
Any of these words (continued)	To use the Search Preview feature to search on variations of an entered keyword, click Select variations  icon to open the Select Variations window. The Select Variations window will display the variations for each keyword within a query row that contains a wildcard or is stemmed. When the Search all variations of the keyword terms (stemmed search) option is checked, the window will show variations for every keyword in the query. When this option is not checked, variations will be shown only for terms containing wildcards (* or ?). You can access the variations of each term using the Select variations for drop-down list. Variations are listed in alphabetical order. The window also shows the number of matching emails and matching unique files that contain the keyword. Select the check boxes or row for the variations that you want to include, and click OK. To display the selected or unselected variations, choose from the Show drop-down list. To copy the list to your clipboard, click Copy Shown Variations. Note: The number of matching emails and matching unique files are not constrained by any criteria within the Advanced Search screen. They will always reflect the numbers for the entire case corpus.



All of the words	Finds messages, attachments, or other files that contain all of the specified words, in any order. Because the system treats messages and attachments as separate documents when searching, a match occurs for a message only if all of the words are in the message or in an attachment. A match does not occur if the words are split between the message and an attachment.
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Advanced Document Search Criteria (Continued)

Criteria	Effect on Search
The exact phrase	Finds messages, attachments, or other files that contain an exact match of the specified phrase, including common words such as “the” (any punctuation included will be ignored). This field has the same effect as a basic search where the phrase is enclosed in quotation marks.
None of the words	Excludes documents that contain any of the specified words. By contrast with NOT searches, messages are excluded if the body or attachments include the specified words.
Fields to search	Determines the elements to search in documents, including subject, body, attachments, sender, and recipients.
Search all variations of the keyword terms (stemmed search)	If the check box is selected, performs stemmed searches on keywords or phrases (words in quotes). Stemmed searches find variations of words such as plurals or alternative verb forms. The system can support stemmed searches in English and more than 10 additional languages, including Czech, Dutch, French, German, Greek, Hungarian, Italian, Polish, Portuguese, and Russian. Your case administrator determines which of these are enabled for your case. If the check box is cleared, the search includes only literal text matches on the specified keywords. Use the search preview feature to view the stemmed word variations. Note: To reduce the likelihood of false positives, the system does not perform stemming on the To, From, CC, BCC and Attachment/File name fields in documents.
Limit filter and count generation for improved search speed	If selected, Sender, Recipient and Keyword filter information will not be generated. In addition, the Participants screen will not be available and the Search Report will not display keywords or counts. To see this information, you may re-run the search at any time without this option selected.
Normal filter and count generation	If selected, a filter is created for each search term entered, however, it does not create a filter for the expanded, wildcard matches of the search terms.
Generate keyword details for filters and report	If this check box is selected, additional search processing will occur when the search is run to provide filters and found document counts for each of the variations that are selected within the Select Variations window. See “Using the Search Reports Screen” on page 71 for further details. Note: This additional processing may take a long time, depending on the number of terms within each query row and the number of query rows.
Concept	
Note: Concept Search has been removed temporarily. It will be added back in a later release.	

Advanced Document Search Criteria (Continued)

Criteria	Effect on Search
Find common terms and documents related to a concept	Enter one or more terms, phrases, or paragraphs. Click the edit icon to refine your search in the Concept Builder window. Choose from pre-selected terms in Search Preview pane based on these concepts to build your search in the Search Explorer (graphical) view. Note: Click any term surrounding your original concept to build another branch of concepts stemming from the new term. As you build your concept search, by selecting (or de-selecting) terms, click the Refresh link to update your document count. To adjust the number of documents, use the play buttons above the Explorer view to move forward or back through your actions as you refine terms, and refreshing after each change. When finished, save your search or start over to build on a new concept. Optionally, after saving your concept, you can click Save as Keywords. This allows you to run a Keyword search using the same concept terms you selected, already pre-populated in the Keywords section of the Advanced Search screen. See "Freeform Searches" on page 43 for further details.
Participants	
Any/and any/or any/not any	Finds documents that have the specified participant names, email addresses, or domains in the From field. Note the following guidelines: • Multiple names, email addresses, or domains must be separated by semi-colons. • To search for an alias, enter alias(<aliasname>). • If you enter a name, the name order is not critical. For example, enter john smith or smith john to find all documents sent or owned by John Smith. • If you enter a partial domain, specify the right-most portion of the name, and include the full text between the period delimiters. For example, to match all emails in "us.example.com", you can enter "example.com" but not "us" or "com." • Selecting any in the first row specifies that within a single text-entry box, only one of the criteria must match in a document for the entire row to be considered a match. • Adding an additional line allows you to choose other operators for that line: – and any specifies the criteria in that row is required for the search. – or any indicates that the criteria in that row is optional. (However, one row must be required if all other are optional.) – not any indicates that the criteria in that row should be excluded. (If documents are found which contain any participants in this row, those documents do not appear in the results.)

Advanced Document Search Criteria (Continued)

Criteria	Effect on Search
(All)/(Recipients)/ From/To/Cc/Bcc	Finds documents that have the specified names, email addresses, EV Journal envelope message information, or domains according to the following rules: • (All) searches all fields: From, To, Cc, or Bcc fields (these fields are blank on loose files). • (Recipients) finds documents in the To, Cc, or Bcc fields. • To search any single sender or recipient field, select From, To, Cc, or Bcc. These fields represent the specified individual and the product searches all documents from all of that individual's email addresses.) • If the "Search in contained senders and/or recipients" option is selected, the equivalent contained fields are also searched. See the guidelines for: • /E-mail address/Domain in the next field to specify participant names/ email/domains. For EV Journal message and email details, see "Journal Envelope Message Searches" on page 105.
Participant/E-mail address/Domain name	Specifies the search type: • Participant — searches for all documents from an individual, as identified by the primary email address. Results will contain the primary email address of the selected participant. (A participant search on a secondary email address will not return any results.) Note: The "primary" email address is determined by the first address found for a given participant when data is indexed by the system. • E-mail address — searches for documents with an exact match of the original email address (finds all messages from or to a single email address). The email selector can be used to identify documents from the participant with the exact email address. • Domain — searches for documents with part or all of a domain from the original email address. For example, enter yahoo to find all documents from yahoo.com or images.yahoo.co.uk. (Sender and recipient domains are generated using the original email address domains so that the domain will appear in the appropriate field of the filtered documents in your search results.) Note: Wildcards (?, and *) are supported in these fields, however using wildcards does not initiate a background search, slowing performance.
Search in contained senders and/or recipients	Finds messages with senders or recipients that are in contained email messages (email messages that have been replied to or forwarded).

Advanced Document Search Criteria (Continued)

Criteria	Effect on Search
Tags	For more information on tagging, see “Organize and Track with Bulk Tagging” on page 133 .
Find items that are not tagged	Finds reviewable items that are not tagged.
Find documents where any/all of the items are not tagged	Finds reviewable document families where any/all of the items are not tagged. Note: The key to understanding the difference between the search criteria “Find documents that have <i>any/all/none of the following tags</i>” and “Find documents <i>where any of its items have any/all/none...</i>” is recognizing the tag criteria requirements. For example, if you specify multiple tags in your search, the criteria “Find documents that have...” allows those tags to be spread across multiple items in the document whereas the search criteria constraint “Find documents where ANY of its items” option requires that an item in the document must satisfy the tag criteria.
Find items that have any/all/none of the following tags	Finds all reviewable items that match all of the selected values. The options in the area are activated when you select this button. The available options depend upon settings that your case administrator has configured. – To find items that have one or more of the selected tags, from the Any of these tags section, select the tags you want returned. – To find items that have all the selected tags, from the All of these tags section, select the tags that must be returned. – To find items that have none of the selected tags, from the None of these tags section, select the tags that you don’t want returned in your search. To select the tags that you wish to search for, choose the tags from the available drop-down lists and check boxes. For check box values, you can choose whether to match one or more of the tag values (any) or none of the tag values (None).
Find documents that have all/any/none of the following tags	Finds all reviewable document families that match all of the selected values. The valid options are activated when you select this button. The available options depend upon settings that your case administrator has configured. • To find document families that have one or more of the selected tags, from the Any of these tags section, select the tags you want returned. • To find document families that have all the selected tags, from the All of these tags section, select the tags that must be returned. • To find document families that have none of the selected tags, from the None of these tags section, select the tags that you don’t want returned in your search. To select the tags that you wish to search for, choose the tags from the available drop-down lists and check boxes. For check box values, you can choose whether to match one or more of the tag values (any) or none of the tag values (None).

Advanced Document Search Criteria (Continued)

Criteria	Effect on Search
Find documents where ALL of its items have any, all, none	Find document families where ALL of its items have any/all/none of the selected tags with the criteria specified. Some examples of this search type: • Example 1: You want to find document families where all of its items have any of the tags Privileged or Partially Privileged. This choice would return document families where all items in the family have either: Privileged, Partially Privileged, or Privileged & Partially Privileged. • Example 2: You want to find document families where all of the items are all tagged as Responsive. • Example 3: You want to find all document families where all of the items are not tagged as Responsive.
Find documents where ANY of its items have any, all, none	Find document families where ANY of its items have any/all/none of the selected tags with the criteria specified. Some examples of this search type: • Example 1: You want to find document families where any of its items have any of the tags Privileged or Partially Privileged. The search results would return document families where any items in the family have either: Privileged, Partially Privileged, or Privileged & Partially Privileged. • Example 2: You want to find document families where any of the items are all tagged as Responsive and Hot. The search results would return document families where any item in the family have all tags: Responsive and Hot. • Example 3: You want to find document families where any of the items are not tagged as Responsive.
Find documents where NONE of its items have any, all, none	Find document families where NONE of its items have any/all/none of the selected tags with the criteria specified. Some examples of this search type: • Example 1: You want to find document families where none of its items have any of the tags Privileged or Partially Privileged. The search results would return document families where none of the items in the family have either: Privileged, Partially Privileged, or Privileged & Partially Privileged. • Example 2: You want to find document families where none of the items have all tags Responsive and Hot. The search results would return document families where none item in the family have all tags: Responsive and Hot. • Example 3: You might want to find document families where none of the items have any of the tags Privileged or Partially Privileged. The search results would return document families where none of the items in the family would have tags Responsive or Hot.
Find tag-specific comments	Finds items that are currently tagged with matching comments. It does not search for previous values. Comment search supports the use of wildcards (* or ?), logical operators (AND, OR, NOT), and phrase searches ("quick brown fox"). Wildcards are not supported within phrase or proximity searches. Note: Item notes or tag event comments are not searched.

Advanced Document Search Criteria (Continued)

Criteria	Effect on Search
Find items with no current item note	Finds reviewable item with no current item note
Find item notes containing	Finds reviewable item notes that match your search terms specified in the text comment field. Comment search supports the use of wildcards (* or ?), logical operators (AND, OR, NOT), and phrase searches ("quick brown fox"). Wildcards are not supported within phrase or proximity searches.
Actions	
Any of these actions	Finds items that are associated with the specified actions. Select one or more actions, or select Any of these actions to match any of the listed actions.
Any of these users	Finds items with actions that are associated with the specified users. Select one or more users, or select Any of these users to match any of the listed users.
Date of tag or folder event	Finds items with actions that occurred on the specified dates. Select Exact Date to specify a single date or Dates Between to specify a start and end date.
Find items by tag event comments containing	Searches the tag event history log to find comments containing a specific value. The comment search supports the use of wildcards (* and ?), logical operators (AND, OR, NOT), and phrase searches (such as "quick brown fox"). Wildcards are not supported within phrase searches. Note: This will not search tag-specific comments. To search tag-specific comments, use the search field in the "Tags" section.
Find items by historical tag values	To search for items that have ever been tagged with a particular value, combine this option with Find items with the following tags in the Tags section. Note: Historical tag values are not available in upgraded cases.
Emails	
Subject	Finds messages that match the specified subject line.
Any of these sender/recipient groups	Finds messages sent to or from any users in the specified group, and any loose files owned by members of the group. Group names and members depend on your organizational data. Group names are usually specified in the "Department" field of your Active Directory. Administrators can also define groups manually.
Direction	Finds messages sent in a specific direction (default is all directions): • Internal Only — Sent between internal addresses. • Outbound Only — Sent to external addresses. • Inbound Only — Sent from external to internal addresses.
High Importance Only	Finds messages set to High Importance, if option is selected.
Sensitivity	Finds messages set to Sensitivity, if option is selected.
Normal	Finds messages set to Normal, if option is selected.

Advanced Document Search Criteria (Continued)

Criteria	Effect on Search
Flags	
File Processing Flags	Finds items that have any, all, or none of the selected file processing flags. Only matching items will be returned as hits. Saved searches with this constraint will return new item counts in the results. Note: This option is visible only for users with the "Allow searching and filtering by processing flags" permission.
Message Processing Flags	Finds messages that have any, all or none of the selected message processing flags.
Files/Attachments	
Find only documents, attachment or file	Limits the search results to messages with attachments or loose files or search results that have no attachments based on your selection: • have attachment or file. • does not have attachment or file. When you select the Find only documents... check box, the additional file fields in this section become active.
Find documents with no indexed text	Finds documents, such as image-only PDF files or gif/tiff image files that have readable text images but no text that can be searched. (This sub-option is unavailable with Concept searches.) Note: If a file could not be indexed due to corruption, or password protection, for example, it will not be classified as having "no indexed text". Instead, it will have a warning flag set to "no content found". This is to reduce the number of "false positives" you would otherwise get from files that are not actually reviewable.
Find documents with ANY of the words	Returns results that are independent of the entries in the Keywords area. Words entered in this field are ORed with words entered in the keywords fields and ANDed with the other advanced search entries. (This sub-option is unavailable with Concept searches.)
Any of the words	Finds files or attachments that contain any of the entered words.
Any of the file names or extensions	Finds attachments or loose files with names or extensions (such as "doc" or "xls") that match any of the entered words. A period before the extension is optional. Multiple names or extensions must be separated by a space or comma. For example, to find all files with an "htm" or "html" extension, enter "htm html". If you enter a file name with an extension, such as "energy.doc," the match occurs only on the file name "energy.doc." To find files names with any extension, enter the name without the extension, such as "energy."
Find documents with no extension	Finds documents that have no file extension.

Advanced Document Search Criteria (Continued)

Criteria	Effect on Search
Any of these file types	Finds messages of the specified application types. Use the check boxes to select file types, or select the check box at the top of the list to select all types. Use the scroll bar to view all the available types. Select Any from the drop-down list to match any of the specified application types, or select None from the drop-down list to exclude the specified application types.
Folders	
Bring in document families	Select check box Bring in document families to add every member of every document family to your results. This is useful when attachments match the search criteria but you want to include (to provide context), every other member of the document families in your result and filters. Note: Document family members that are brought in (and do not match search criteria) will have a zero score.
Find items by type and by folder...	Choose one of the following options: • Find all items (ignore folders)—Find all items, regardless of the folder. • Find items in any folder—Find all documents that are in a folder. • Find items not in any folder—Find all documents that are not in a folder. • Find items which meet the following folder criteria—Select check boxes for the Any, All, or None options. You can select check boxes for multiple options.
Identifiers	
Document IDs	Finds items according to identifier. Email messages, loose files, attachments, and embeddings have document IDs that are automatically assigned during indexing. These IDs are persistent and can be used for search, export, and production.
Source Name and Location	Finds documents based on the specified source or folder location. Note: You can search only for one contiguous part of a locator path (for example, *.pst or "Inbox" but not *.pst Inbox). Wildcards are allowed within a single path element (if there are no slashes in your locator string). Examples: • Searching for Inbox will find Inbox. • Searching for user will find PST files with user in the name (because user.pst is a filename, its components are independently searchable without a wildcard). • Searching for my* will find locations that start with my. • Searching for c: will find locations containing c:. • Searching for *.pst will find container files with a pst extension. Note: Any string with slashes, either \ or / will break the search, and sub-location searches are not supported.
(Additional options)	Select whether to Include all documents, Exclude third party production documents, or Include only third part documents as part of your search.
Any/All of these Custodians	Finds documents that the administrator has assigned to all or only specified custodians.

Advanced Document Search Criteria (Continued)

Criteria	Effect on Search
Any/None of these processing batches	Finds documents that are in any or none of the specified processing batches or none of the specified processing batches. A processing batch is a label that is associated with all of the documents that were processed by the system at one time. Processing batches and their associated labels are defined by your administrator. See the <i>Veritas eDiscovery Platform Administration Guide</i> for more information on processing batches.
Match documents that have never been exported	Finds documents that have never been exported.
Match Any/None of these export batches	Finds documents which match any or none of the specified export batches.
Match documents that have never been printed	Finds documents that have never been printed.
Match Any/None of these print batches	Finds documents which match any or none of the specified print batches. Note: Export and print batches are tracked at the custodian level to facilitate rolling productions of native documents out of the system. In such situations, you may have performed an export for one custodian ("Joe"), but still have data coming in for another custodian ("Jim") and want to be able to do a search at a later time to find only those documents that have not been exported for Jim even if some (duplicate) documents may already have been exported for Joe. To do this, specify Jim in the custodian picker and Match any documents that have never been exported in the export batch selector.
Match documents that have never been OCR processed	Finds documents that have never gone through OCR (Optical Character Recognition) processing.
Match Any/None of these OCR batches	Finds documents which match any or none of the specified OCR batches.

Advanced Document Search Criteria (Continued)

Criteria	Effect on Search
Languages	
Language selection table	Starting in V8.0, this is an item based search and returns only matching items. Saved searches with this constraint will return new results when compared to pre-V8.0. Note: The Predominant languages feature has been removed and is considered deprecated. Any previously saved searches with this constraint will display an error and any edited searches using the predominant language feature will not be saved. Finds items according to the following language properties. l • Must Contain At Least One of These—Finds items that contain at least one of the selected languages. • Must Contain All of These—Finds items that contain all of the selected languages. • Must Not Contain Any of These—Finds items that do not contain any of the selected languages. • Ignore These—Ignores these languages during your search. Note: The advanced language search options may not appear if your case only contains one language.
Load File Fields	
	Find documents by using fields imported through third party load files using any of the following search fields: • All /Any / None —Search your imported load files for any of the custom attribute fields contained within. For example: ATTACHEMENT_FOLDERS or ATTACHMENT_TAG
Predictions	
any/not any	Enables positive or negative searches Note: To search for items that are not predicted, use the <No Predictions> search filter in the Documents screen.
Model (or tag name)	Displays a list of all predictive tags
Rank Between/ Unknown/ No Indexable Content/ Training Document	Finds items according to the following rules: • Ranked Between specifies the range of Prediction Ranks • Unknown includes all items that do not match the training set. • No Indexable Content includes items that could not be assigned a Prediction Rank • Training Document includes all items used for training the predictive tag. Note: The search training filter separates items into Trained and Not Used whereas Advanced Search Training Document combines both of these elements into Training Document.
Min%/ Max%	Specifies the minimum and maximum prediction ranking

Advanced Document Search Criteria (Continued)

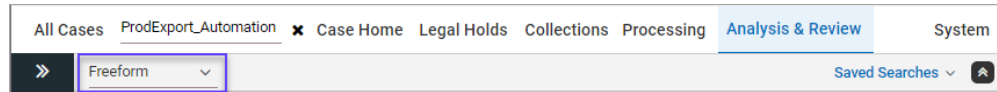
Criteria	Effect on Search
Production Numbers	
Production Number and Imported Number	Finds documents by production or Bates number: • Ignore—Do not use production criteria. (Also applies to Imported Number.) • Not Produced—Finds only documents that have not been produced. (Also applies to Imported Number.) • Not Produced in—Finds only documents that are not part of this production. (Also applies to Imported Number.) • Exact Number—Finds documents with the specified production number. (Also applies to Imported Number.) • Number Between—Finds documents with a production number between the specified values. • Slipsheets for Prefix—Finds the slipsheets for a production. Slipsheets are generated when issues are encountered during image generation for a document in production. Searching for slipsheets allows you to identify the documents that may require re-production or special attention during the production. • List—Produces a list of all production numbers for the matching specified criteria (box appears below when List is selected). (Also applies to Imported Number.) Note: Starting with 9.1, search against Production Number and Imported Number displays just the items that the import numbers are associated with. Search results do not display the entire family.
Size	
Document Size	Finds documents by file size. For email messages, document size is the combined size of the message (including headers) and all of its attachments. Select one or more of all available size ranges. The largest possible range is "500 MB or larger". Note: Size ranges start with a whole number. For example, exactly 10 KB is in the 10 KB - 100 KB range while 9.99 KB is in the 0 KB - 10 KB range.
Email Headers	
	Find documents by email header fields. • Any/All/None — Search the headers of email messages. For example: X-Originating-IP, Received, and Message-ID. Note: Email Header Search is only available in cases created using version 7.1.3 or newer. Also the case setting Enable Email Header Search must have been enabled prior to data processing, and only specified email header fields will be available to search.

3. Click **Search** at the top-right corner of the screen to view the search results.
4. Click **Actions** and select **Save** to save your search.

Freeform Searches

To perform an advanced search using queries

1. Select **Freeform** from the search-type list.



2. In the Queries area, enter any combination of the criteria listed in the following table.

Freeform Search Criteria

Criteria	Effect on Search
Apply this message query	Finds messages that match the specified query. For example: • To find documents where there are 10 or fewer intervening words between "budget" and "issues," use the search: budget w/10 issues • To find "contract" in the Subject field and "energy" in the message body: +(+u_subject:Contract +u_body:energy +u_quotedTextN:energy) • To find "contract" in the Subject field, except when "concluded" is also in the Subject field: +(u_subject:contract) - (u_subject:concluded) • Search for a participant's first and last name in the To, Cc, or Bcc fields (excludes the middle name): +((toListIndexed:"Phillip Allen"~1) (ccListIndexed:"Phillip Allen"~1) (bccListIndexed:"Phillip Allen"~1)) • Search for messages between the Sales department and the Analysis department: (+ (sendersDept:"sales") + (recipientsDept:analysis)) (+ (sendersDept:analysis) + (recipientsDept:"sales"))
...and apply this file query	Finds message attachments and other files that match the specified query.

3. Click **Search** at the top-right corner of the screen to view the search results.

Note: Due to the complexity of Freeform queries, matching text may not be highlighted in the search results.

For more information about Freeform queries, see ["Freeform Searches" on page 98](#).

Tag Event History Searches

To search for document comments included in tags

1. Select **Tag Event History** from the search-type list.
2. Select **Tag** from the **Style Event History**.
3. Enter criteria as described in the following table.

Document Comment Search Criteria

Criteria	Effect on Search
Author/Tagger	Finds comments entered by the specified user (default is all users).
Find comments containing any of the words:	Enables you to find specific comments using basic search query syntax. You can also search item notes by selecting "Also include item notes". The results of a comment search are displayed on the Tag Events screen (see "Using the Tag Event History Screen" on page 139).

4. Click **Search** at the top-right corner of the screen to view the search results.

To undo a tag operation

1. Select a tagging event to display the impacted documents.
2. Using the Tag interface, bulk tag the impacted documents to update them. (Note that this bulk change could override the tagging operations of other reviewers.)

Working with Previous and Saved Searches

The Saved Searches button at the top-right corner allows you to run, save, edit, or delete searches.



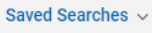
The area is divided into the following sections:

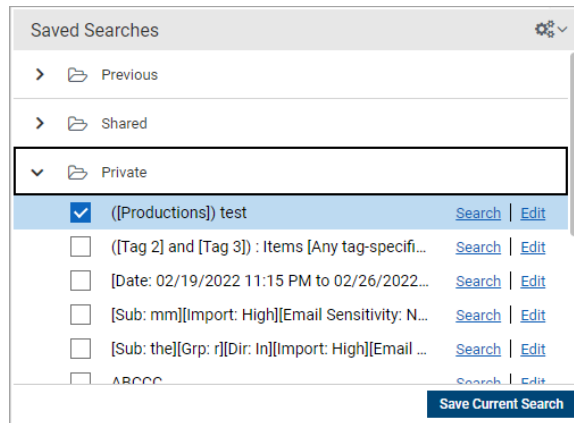
- **Previous**—Previously run searches. These are searches that have not been explicitly saved, but are kept by the system. Only the last 50 previous searches will be listed. Older previous searches are deleted.
- **Shared**—Saved searches that are accessible by multiple users.
- **Private**—Saved searches that are accessible only by the user who saved the search.

Previously Saved Search Considerations:

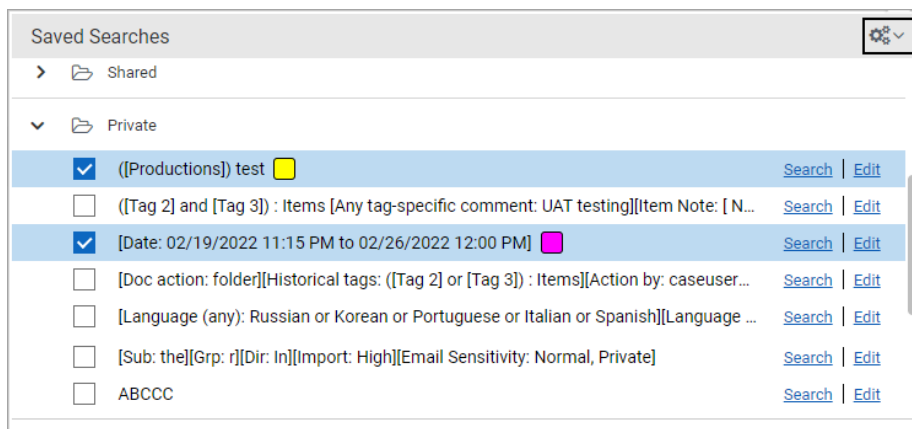
- Only the original creator of a shared saved search or a case administrator can edit or delete shared saved searches. Only the original creator of a private saved search may edit or delete that saved search.

To refine a saved search

1. Click **Saved Searches**  at the top-right corner.
2. Select a saved search under Previous, Shared, or Private categories.



- To modify a search, click the **Edit** link for a search variation to open the Advanced Search screen.
 - A **Refresh** link is shown for any search that has been run as a job. Clicking the link updates the results that were saved with the search. Search results may become outdated if new documents have been processed, or if new tags have been applied and the search contains tag search criteria. See [“Setting Up Search Jobs” on page 49](#).
 - To delete one or more saved searches, select the respective check boxes and then click **Action**  icon > **Delete selected**.
 - To edit the names of different folders, click **Action**  icon > **Edit Saved Search Folders**.
3. To highlight the search string or strings in bold in the search results, click **Action**  icon > **Highlight terms**. The search items are also highlighted in the Previous or Saved search area.



4. The system enables you to associate a unique highlight color with saved searches. By default, all searches are given a highlight color of yellow. However, if you would like to be able to view different search hits in different colors (for example, to distinguish between responsive and privilege terms during review), select the desired color from the **Highlight Color** drop-down list when creating your saved search.

Saving Searches

Note: The search query for a saved search should only contain search terms. Including additional search constraints such as document identifiers, tags, or languages can cause search term highlighting to render incorrectly.

Since reviewers often use hit highlighting as a prompt to open attachments, ensure that saved searches only contain search terms.

To save a completed search

1. Click **Saved Searches** Saved Searches ▾ at the top-right corner.
2. In the Saved Searches dialog box, click **Save Current Search**.
3. Enter the following information and click **Save**.

Saved Search Information

Field	Description
Name of Saved Search	Enter the search name to be listed in the control panel (up to 20 characters).
Parent Folder, Name of New Folder	Select an existing private or shared folder used for saved searches, or select <New Shared Folder> or <New Private Folder> and enter the name of the new folder.
Search Notes	Enter an optional description of the search.

You can also save searches on the Advanced Search screen. Click **Actions** drop-down list, and then click **Save** or **Save as** and enter the same information listed in the previous table.

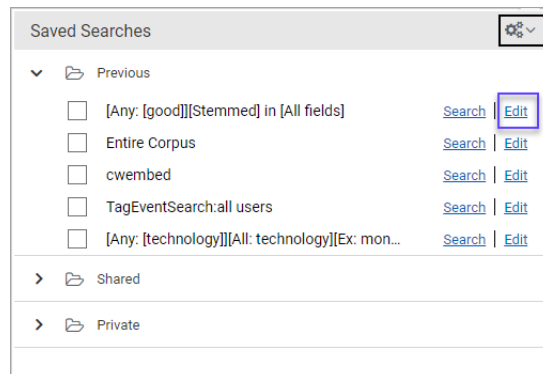
Managing Saved Searches and Search Folders

Only the original creator of a shared saved search or a case administrator can edit or delete shared saved searches. Only the original creator of a private saved search may edit or delete that saved search.

Note: When running a saved search, even if the original saved search was not previously run, a copy of the search is stored in both folders - one for the current search, and the one for previously saved searches. If the saved search has been previously run, then re-running it from the Private or Shared folder updates the search with new results. However if the search is re-run from the Previous search folder, it will not find the matching Private or Shared search and updates the saved search.

To edit an individual saved search

1. Click **Saved Searches** Saved Searches ▾ at the top-right corner.
2. In the Saved Searches dialog box, click the **Edit** link for the search.



The Advanced Search screen opens.

3. Modify the search parameters as desired.
4. Choose one of the following actions:
 - Click **Search** to run the modified search.

- Click **Actions** drop-down list, and then click **Save** to save the modified search.
- Click **Actions** drop-down list, and then click **Save As** to save the modified search under a new name.
- Click **Clear** to clear the entries on the screen.

To edit a saved search folder, which may contain multiple saved searches

1. In the Saved Searches dialog box, click **Action**  icon > **Edit Saved Search Folders**.
2. Click the **Saved Search Folders** tab.

Saved Searches

Saved Search Folders

Add Folders

Folder ↑	Parent Folder	Created By	Note	Actions
 UAT	Private	superuser		  
 saved 1	Shared	CaseUser	test note	  
 test	Shared	superuser		  

3. Click the **Edit**  icon for the saved folder.
4. Modify the folder name and folder or modify the text notes.
5. Click **Save**.

To copy a saved search or folder

1. In the Saved Searches dialog box, click **Action**  icon > **Edit Saved Search Folders**.
2. Click the **Saved Search Folders** tab.
3. Click the **Copy**  icon for the saved search or folder.
4. Enter a new name, make any additional changes, and click **Save**.

To delete saved searches or saved search folders

1. In the Saved Searches dialog box, click **Action**  icon > **Edit Saved Search Folders**.
2. Click the **Saved Searches** or **Saved Search Folders** tab.
3. Select the searches or folders you want to delete and click **Delete**  icon.

Setting Up Search Jobs

If the system determines that the search is large, it automatically creates a job for the search. When a search runs as a job, the results of the search are calculated and saved with the search. This allows fast access for the results of large searches.

Search jobs run in the Searches area in the Documents screen are shown with a spinning magnifying glass icon, and completed search jobs have a grayed magnifying glass icon. You can access the results of a completed search job by clicking on the search name.

The system saves the results of up to 50 search jobs. If there are more than 50 search jobs, the system deletes the results associated with the job, but does not delete the query. To access the result of such a search, you must rerun the search.

Note: If additional documents are processed, changes are made to custodians or export batches and the search contains custodian or export batch criteria, or additional tags are made and the search contains tagging search criteria, then the results of the search may become out-of-date.

Viewing Search Results

When you submit a search, you can view the results organized by documents, discussions, files, participants or tag events by clicking the corresponding links under the **Analysis & Review** module.

Using the Documents Screen

The Documents screen lists the messages and loose files retrieved from the search results sorted in descending order of relevance score (or by sent date, if no keywords are used). The top of the screen shows the number of documents searched and found, and the number of discussions, individuals, and files associated with the found documents.

By default, the **Sender** column includes selection of the most relevant excerpt from the message body or the name of the file. You can view the details of each document, add tags and item notes or comments, export documents, or print documents to PDF files. You can also open the Discussion Analysis screen to view all messages related to the same discussion.

Version 8.0 Enhancements

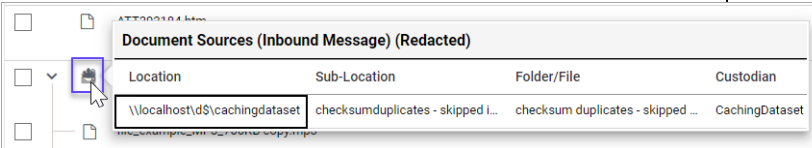
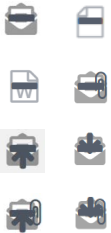
The enhanced **Analysis & Review** module enables new ways in which to explore and interact with search fields and new navigations so you can quickly analyze, tag and review only relevant case content. In particular, the ability to display and concentrate on only hit items at the item or document family level allows for a more efficient review by quickly revealing relationships and connections within case content that might not otherwise be apparent. For high-level summary details, see [“Completely revamped user interface for Analysis & Review tab” on page 18](#).

- Granular managing of case data—Significant enhancements at the item level allow only search hit items to be displayed within a document family grouping. If the parent document is not a hit, it is grayed out. This “fading” of non-hit content allows better focus on content or evidence that may be missed by a search query displaying non-relevant data within a document family.
- Simpler tagging workflow (such as a single screen dialog) to facilitate better reviewing decisions.

To view the Documents screen

1. Click **Found: Documents** under the Documents sub-menu under the **Analysis & Review** module.
2. Refer to the following table to perform tasks on this screen.

Documents Screen - Icons and Functions

Icons or Function	Description
	Displays the document sources, including server or path, mailbox or file, folder, and custodian. From left to right, the icons refer to the following message types under the document  column: • Outbound email • Inbound email • Internal email • Message with attachment • Outbound email with attachment • Inbound email with attachment • Loose file • Document Tip: Click the icon to view the document source information, which shows every custodian and location where this document was found, as in this example: 
	Displays redacted document sources. From left to right, the icons refer to the following redacted message types: • Redacted email • Redacted file • Redacted document • Redacted message with attachment • Redacted outbound email • Redacted inbound email • Redacted outbound email with attachment • Redacted inbound email with attachment
Detail	Displays or hides the message contents. Click on any part of the row to switch between a detail or non-detail view. Note: In eDiscovery platform versions prior to V8.0, users clicked on an explicit "Detail" link.

Documents Screen - Icons and Functions (Continued)

Icons or Function	Description						
Actions 	Under the Actions column, you can choose from several options. From left to right, the icons refer to the following: • Bring in Complete Family — Bring in the complete family for a particular item. Once the family is brought in, the icon changes to Family is complete icon with a check mark. – If selected, a warning in yellow highlighted text above the Actions and View ribbon will display, telling you the number of items brought in and reminding you to refresh the search filters to update the counts. • Family is complete — Indicates entire family has been brought in. • Tag —Opens a tag assignment area, allowing you to tag the document. • Review Mode —Brings up the review pane for analysis, related items and tagging.						
	Displays information about batch processing jobs that include this item when you move the cursor over the icon, as in this example: Processing & Production Batches <table><tr><th>Batch Start Time ↓</th><th>Type</th><th>Batch Label</th></tr><tr><td>Fri Dec 24 2021 00:52:21 IST</td><td>Processing</td><td>batch2</td></tr></table>	Batch Start Time ↓	Type	Batch Label	Fri Dec 24 2021 00:52:21 IST	Processing	batch2
Batch Start Time ↓	Type	Batch Label					
Fri Dec 24 2021 00:52:21 IST	Processing	batch2					
Documents per page: 50 ▾	Determines how many records are displayed on a screen.						
Page: ⏪ < 1 > ⏩	Pages through the retrieved documents. Enter a page number and press Enter to go to that page or use the arrows to go to the next or previous page. Use the Documents per page drop-down list to change the number of documents that are displayed on each page.						
< >	Finds the next or previous occurrence of the search strings. You can also use the following keyboard shortcuts: • Next hit—Alt + keyboard down arrow • Previous hit—Alt + keyboard up arrow						

Documents Screen - Icons and Functions (Continued)

Icons or Function	Description
Column Headers	Changes the sort order. You can sort on sender or owner, sent date, or relevance score. For the Actions column options, see "Actions" on page 52. The Date column indicates the message sent date or loose file modification date If the "Attributes" column header appears, one or more documents in your results set were imported from a load file containing custom attributes. Use this column to sort on all custom attributes. For more information about searching or reviewing documents with custom attributes, see the table in "About Advanced Searches" on page 27, and the section "Linear Review Tools in Review Mode" on page 160. Note: Senders are sorted by first name.
Filters	See "Filtering Search Results" on page 61 .
Tag, Folder, Export, Print, Batch, Cache, OCR	See "Using the Search Reports Screen" on page 71 , "Export and Production Tasks" on page 213 , and "Printing Documents and Logs" on page 214 .

Viewing Similar Documents within the Document Screen

Two emails, attachments, or loose files are considered similar based on whether the number of shared terms exceeds a user-set threshold.

You can view similar items from the Documents screen or from the Related Items pane within Review Mode (see ["Viewing Related Items within Review Mode" on page 161](#)).

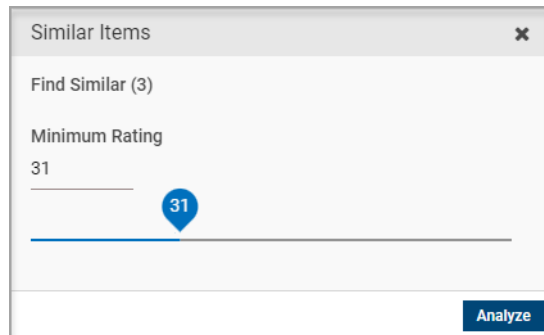
For information on administrator-configured Find Similar settings, refer to ["Changing the Case Settings" in the Case Administration Guide](#).

To view similar documents for each email

1. From the Documents screen, select a message and then click any part of its row to toggle the message detail display to on.
2. Click the **Find Similar** link within the message you selected from your search results.



The Find Similar histogram displays.



Similar Items

Find Similar (3)

Minimum Rating

31

31

Analyze

Upon opening, the Minimum Rating shown reflects the value configured by the Case administrator. (The maximum number possible is 1, by default.)

3. Click and drag the blue slider bar left or right depending on how loosely or tightly similar (respectively) the items you want to analyze should be. Note that the value in the Minimum Rating box changes as you move the slider. The higher your rating, the more closely similar the items are to one another. (You can also enter a value from 1-100.)
4. When you are ready to view the results, click **Analyze**.

The Similar Item Analysis screen appears, showing Messages, Discussions, and Attachment tabs.

Document List [1-50] / Document 8 Similar Message

Similar Item Analysis: Email 2 - Checksum Duplicate Skipped Item across document families

Messages Discussions Attachments

0 items selected View: [Icons]

	Subject / Filename	Sender	Summary	Actions
☐	Email 2 - Checksum Duplicate Skipped Item across document families This is email-2 It has checksum duplicate skipped item Primary Document (1 similar documents found)	Ganesh Malegaonkar		
☐	file_example_MP3_700KB.mp3			
☐	Email 1 - Checksum Duplicate Skipped Item across document families This is email-1 It has checksum duplicate skipped item Similar to primary document . Common Terms: checksum, document, duplicate, email, families, item, skipped	Ganesh Malegaonkar		
☐	file_example_MP3_700KB.mp3			

Documents per page: 10 1 - 2 of 2 Page: 1

The first message is shown in a shaded area (outlined in grey) to indicate that this is the primary document (the document on which all similar items are based.) The primary document will always appear first.

- **Messages** tab. Displays the similar items, the terms that the two items shared.

Note: Since Find Similar is a superset of Near Duplicate technology, not all items on the analysis screen are necessarily similar to each other. Use Find Similar for the items on this screen if you want to explore various documents of interest.

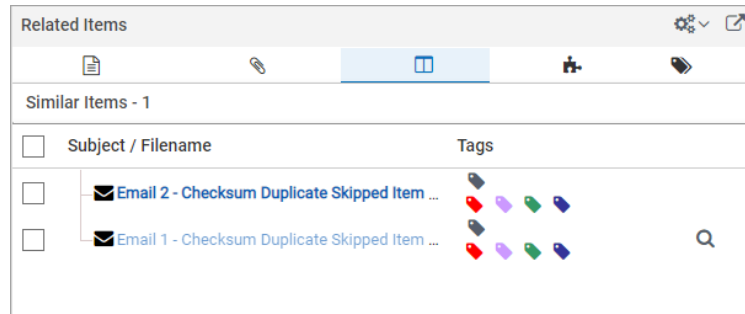
- **Discussions** tab. Displays the discussions that include the similar messages.
- **Attachments** tab. Displays attachments that are similar to the primary document.

Note: Attachment contents are displayed inside the current grouping for easy review

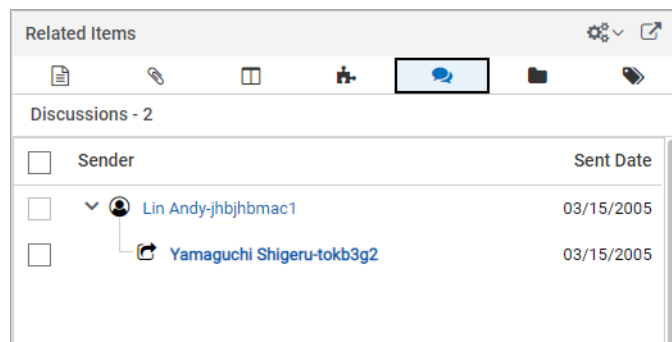
In **Review** mode, you can view discussions, similar items, tag history, and view similar messages displayed on this screen from the Related Items pane. Click the yellow documents icon to view and select similar items. (This icon is greyed out when no similar items are found.)

Note: The Find Similar link is not displayed (in Review Mode) for derived messages. Derived messages are only displayed in search results when part of a discussion thread. You cannot filter, tag or put them into folders.

In the **Related Items** pane, the primary document is in bold, showing the subject/filename, and appears first in the list (before any filtering selections are made).



If you are viewing a discussion related to the primary document, the icons will appear under the individual from whom the discussion initiated (primary document in bold).



For more information about the Related Items pane, see [“Viewing Related Items within Review Mode” on page 161](#).

Understanding Search Result Statistics

At the top of the **Analysis & Review** module, a quick summary of your document search displays.

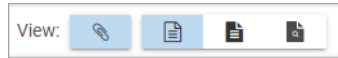
Searched: 22,267 Found: [282 Documents \(325 Items\)](#) [21 Discussions](#) [218 Files](#) [234 Participants](#) [Report](#) *Partial document families returned. [Bring in families.](#) 

Understanding Search Result Statistics

Field	Effect on Search
Searched:	Total number of email messages and loose files searched.
Found:	Total number of Documents and Items found that match the search criteria. • "Documents" include email messages and loose files. • "Items" refers to all reviewable items which include email messages, attachments, and loose files, and embeddings, but does not include duplicates. Note: Your Items number will often be higher than your Documents count. After an initial search, if your results set contains hits, the number of hits displays for documents and items. See also "To view the Documents screen" on page 51 for icon information and detail available in your results.
Discussions	Unique number of discussions that contain at least one email in the found documents. Click the Discussions link at the top of the screen to display this information.
Files	Unique number of files contained in the found documents. A file that is attached to one or more email messages in the found documents and is also a loose file counts as a single unique file. Files having identical content with or without the same file name are also counted as one unique file. Click the Files link at the top of the screen to display this information.
Participants	Number of participants or the number of unique email addresses - either sent or received email messages- contained within the set of found documents.
Report	View Search report containing statistics, results, and keywords used. Click this link to display a summary report on the search results. (Also contains Concept Search report when a Concept Search is run.)
*Partial Document families returned.	For searches that do not involve a full corpus search, indicates that not every member of the document family is returned.
Bring in families	Adds every member of every document family to your results. This is useful when attachments match the search criteria but you want to include every other member of the document families in your result and filters. It may, for example, be more efficient to review attachments to an email at the same time as reviewing an email.

Changing Your Search Results View

Each Search Results screen contains icons that correspond to different viewing options for the documents listed in the search results.



From left to right:

-  **Toggle Attachments**—Show or hides the display of attachments. This can be very useful if you want to quickly see what attachments are associated with a parent message.
-  **Snippets View**—Displays the most relevant excerpt from the document. (Default view).
-  **Details View**—Displays the full body of the message.
-  **Enter Review Mode**—Opens the Document Review screen. See [“Using the Document Review Screen” on page 156](#).

The message header that is displayed in **Details View** and **Review Mode** includes a text box with metadata (such as the document ID and language percentages) in the message, in addition to standard email header information. In version 8.0, metadata (such as document ID, custodians, language percentages, file name and size) for all items and attachments is also displayed.

To view additional information on individuals, click the name of a discussion participant or in the **From**, **To**, **cc**, or **bcc** fields of an email message. The information includes all of the individual's email addresses and display names.

Recipient Details	
Display Names (3)	Mark Whiting, Mark.Whiting@schwab.com, Whiting, Mark
Group	External
Email Address(3)	mark.whiting@schwab.com, Whiting, Mark [mailto:Mark.Whiting@schwab.com], Whiting, Mark

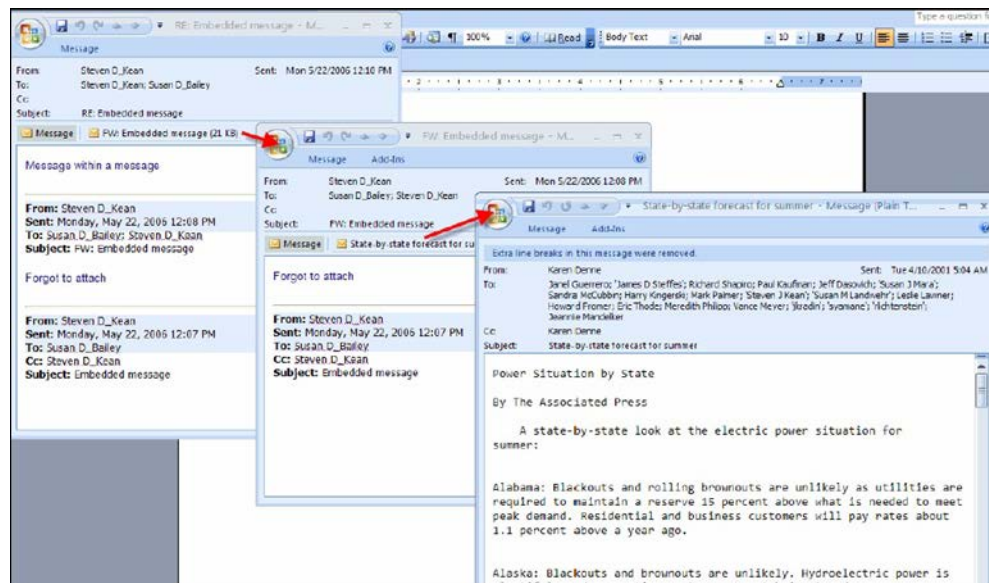
For more information about the Search Results screens and options, refer to the remaining sections in this chapter.

Nested Email Attachments in Search Results

After processing, nested email attachments where the document family has not been brought in are displayed as a flat list. If you select Review mode or opt to bring in a single family into the results, then search results are displayed in a hierarchy so that contained files are displayed with their containers, and attachments are grouped with their parent email messages.

Email attachments are searchable as loose file attachments. Their full text is indexed, but they are not searchable by way of their email metadata and are not included in discussion threads. (This is consistent with loose file attachments, which, beyond full text, are only searchable by their filename.)

For example, the email shown in this figure has two nested attachments ("FW: Embedded message" and "State-by-state forecast for summer").



The following figure shows how the attachments appear in the Veritas eDiscovery Platform user interface. This view neatly displays and sorts the entire document family in a flattened view that can either be hidden or shown.

In this example, notice that all of the messages and attachments are presented on the same level underneath the top-level parent (there are two attachments one below the other with the parent email displayed first). You can easily perform different tasks on each attachment by clicking one of the icons (such as tag or review) under the **Actions** column.

You can switch between a detail and non-detailed preview of the document by simply clicking on it.

	Subject / Filename	Sender	Recipients	Date	Attri...	Attribute	Actions
☐	☐ Checksum Duplicates - Skipped Items within doc...	Ganesh Malegaonkar	User2	06/11/2020 1:51 PM IST			
Doc ID: 0.7.201.18914 Find Similar Custodian: CachingDataset Language(s): English (100%) From : Ganesh Malegaonkar <ganesh.malegaonkar@veritas.com> ; To: User2 <user2@silverroot.com> ; Sent: Thu Jun 11 2020 13:51:59 IST Subject: Checksum Duplicates - Skipped Items within doc family Here are my thoughts on the online banking industry and the territory splits between the reps. Can you please forward this on to your teams to make sure that this calibrated to their regions, thanks. Also, please let me know if there is anything else in this map that is missing from your perspectives. Best, _____							
☐	file_example_MP3_700KB copy.mp3						
☐	file_example_MP3_700KB.mp3						

Filtering Search Results

After you submit a search, if filters are enabled, you can apply filters to limit the search results to just the email messages or loose files, folders, tags, sender domains, or names. The available filters depend on the search results. For example, the **Folder** filter is displayed only if one or more retrieved documents have been assigned to folders.

Documents and Items Counts For Search Filters

To help users quickly display search filter results with a consistent unit of measurement across all the search results, you can use the **Docs Items** toggle buttons. The **Docs** toggle button can be used to see filter search results counts using the document family as the unit of measurement. Similarly, if you need item counts and need item metrics, you can select the **Items** toggle button to show item level counts. Switching between document and item filter counts is a single click and can be done at any time.

Note: Using the **Docs Items** toggle does *not* alter the underlying filter behavior (what unit of measure the product uses to determine and derive the filter count). This means, for example, that filters that derive their counts at document level (such as **Message Flag**, **Document Size**, and **Export Error** filters) will continue to operate at the document level regardless of the **Docs Items** toggle selection. The same applies for filter counts based on item level counts.

Extract Insight From Items/Documents Search Result Filters

Items Filter - Examples

Suppose you are a case manager that tracks your review progress by counting the number of items with tags and the number of items in folders. Since you consider an item count more reliable in terms of exactly how much review work is to be done, you opt to show item counts for tags and folders.

In this example, a case manager logically creates review batches by custodian and the case reviewers review all documents from a particular custodian. With the items count selected, the review team can now easily see and identify all the emails with attachments and other loose files from that particular custodian.

Documents Filter - Example

Suppose you are a case manager that manages case progress by measuring how many documents have been tagged and put in folders. You and your organization are specifically interested in and adhere to the practice of tracking document counts. The document counts filter enables you to continue tracking your case by the same document metric used in previous versions of the product.

To enable filters

From the Advanced Search window, ensure that the Filter and Count Generation options are set to one of the following options:

- Limit filter and count generation for improved search speed
- Normal filter and count generation
- Generate keyword details for filters and report.

If the first “Limit filter...” option is selected, then Sender, Recipient and Keyword filters will not be generated. Some filters will still be available, such as Folder, Tag, Custodian, File Size, File Type and Document Type. In addition, the Participants page will not be available and the Search Report will not display keywords or counts. To see this information, you may re-run the search at any time without this option selected.

For more information, see the steps [“To submit a standard advanced search” on page 28](#).

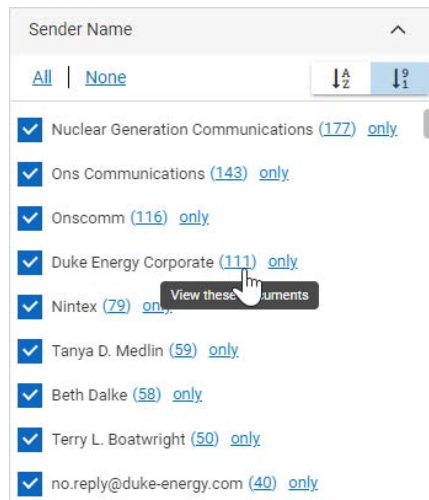
To display or hide filters options

1. Click the Collapse  icon (top-right corner of the **Filters** pane) to display or hide the **Filters** search results panel.

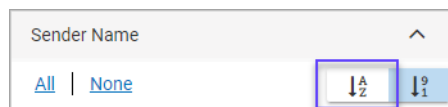
By default, the panel is displayed.

2. Click the arrow for one of the filter categories to display a list of filter options.
3. To change the width of the filter panel, drag the right border.
4. Refer to the following information when using the Filters panel.
 - When a search is completed, the options in the Filters panel are those that were included in the search. For example, if your search criteria did not include tags, the By Tag section lists the Not Tagged selection.
 - Each filter category displays the matching items or filter values that are included in the current search results. The underlined number in parentheses indicates the number of retrieved documents that match the item.

- Click an underlined number to quickly refine the search to include only that item in that category. For example in the next figure, clicking the underlined numeric link for *Duke Energy Corporate* immediately filters the current search results to include only the messages that have the sender name *Duke Energy Corporate*.



- You can sort filters alphabetically or by count, by clicking the respective buttons.



Note: Folder and Tag filters cannot be sorted alphabetically. These filters are organized in a tree hierarchy.

- All folders are displayed in the filters. (Only tags currently applied are displayed.) Folder and Tag values only display in the hierarchy if a document has been assigned that value.
- Click **any** to include any of the values in this category in the search, or click **none** to include none of the values in this category.
- Tag filters can be sorted by document family count or item count (which includes attachments and embeddings in the count). As with most of the filters, you can toggle between the document family and item counts by clicking either the **Docs** or **Items** buttons at the top right-hand side of the Filter pane. The tag filter default reflects the default specified in the case settings. Upgraded cases that do not have item tags default to the document family view.

Note: Every category must have at least one value set. Otherwise, no documents will be returned.

- When you select multiple filters, they match if any one of the filters matches (OR match).
- A scroll bar is available if the number of filters is too large to fit.
- To select the check box for only one item in a filter category, click the **only** link for that item.

5. Click **Apply** to refine the search based on any modifications that you have made.

Note: You do not need to click **Apply** if you click a numeric link for a filter item. The search is performed immediately when you click the link.

- You can rerun your search to show only those results that match the selected filtering options.
- You have a choice of displaying filters with document family counts hits by clicking on **Docs** button or filters with item counts (including attachments and embeddings) by clicking on **Items**. These buttons are located at the top right-hand side of the **Filters** pane.

Here are the supported search filter analytics:

Search Filters

Filter Name	Filter Count Based on Item, Document or Both	Guidelines
Folder	Both	Folder filters are generated even if you limit your search to one folder. If one document is contained in multiple folders, the folder filter will show the folders. The folder count is updated automatically after any actions are taken.
Tag	Both	Note: The document family count returns the number of parent containers of the items that are hits. Image Status Tags subfilter: • If the “Allow image management” privilege is set, a set of system tags are automatically generated for tracking imaging events and monitoring the imaging status of items. For a description of subfilter items, see "Image Remediation" in the Case Administration Guide. – To set image management privileges for users, see "Defining User Roles" in the System Administration Guide. Note: This option is available only if tag sets are defined. Note: This privilege is set by default for the user roles System Manager, Group Admin, Case Admin, and eDiscovery Admin.
Classification	Both	The classification filters function like tags. The classification categories are not configurable and are selected during processing by your administrator.

Search Filters

Filter Name	Filter Count Based on Item, Document or Both	Guidelines
Prediction Rank	Both	All prediction tags and includes a <Not Predicted> filter. Use the <Not Predicted> filter to search for items that are not predicted. Prediction Rank also includes 2 subfilters: • Predictions subfilter— lists all the items that have been run through the Predict action. The items are separated into: – 5 predefined buckets of prediction percentages. – “No Indexable Content” — includes items that could not be assigned a Prediction Rank. – “Unknown” — includes all items that do not to match the training set. • Training subfilter — lists all items that have run through the Train action. These are further separated into: – “Training” — includes all items used for training the predictive tag – “Not Used” — includes all items that were not used for training due to training errors.
Sender Domain	Both	Includes the Internet domain names of message senders along with the count of the number of messages sent from each domain. Note: The filter may include an Unknown domain if any of the messages in the search results had domains that could not be interpreted. (This filter is not available if “Limit filters” option is selected.)
Sender Group	Both	Includes an External group for all external senders, and an Internal group for all internal senders that do not belong to any other groups. Note: If your administrator has run an Active Directory crawl, then this filter will also contain group information from your organization's directory. (This filter is not available if “Limit filters” option is selected.)
Sender Name	Both	Includes names of message senders along with the number of messages sent by each sender. Note: This filter is not available if “Limit filters” option is selected.
Recipient Domain	Both	Includes the Internet domain names of message recipients along with a count of the number of messages sent to each domain. Note: This filter is not available if “Limit filters” option is selected.

Search Filters

Filter Name	Filter Count Based on Item, Document or Both	Guidelines
Recipient Name	Both	Includes the names of message recipients along with the number of messages sent to each recipient. Note: This filter is not available if “Limit filters” option is selected.
Custodian	Both	Includes the names of document custodians along with the number of messages assigned to each custodian.
Keyword Search Query	Both	Includes the specified keywords contained within each query row of the search. Note: To list additional expanded keyword queries based on the selected variations, select the Generate keyword details for filters and report check box within Advanced search.
Document Type	Both	Includes the types of documents (email or loose file).
File Type	Both	Includes filtering by the “strong type” (the actual content, not the file extension) of all items within a document family. Note: The system displays any file types (such as Microsoft Excel) that exist in your search result set and allow you to select the desired file types to hone your search.
Document Size	Document	Includes the size of documents, grouped by size range (to a maximum of 10 MB).
Language	Item	Includes the identified languages. An item is included in the language filter if the minimum threshold for that language is reached. (Refer to Table for details.) Starting in version 8.0, the filter is item-based and filter counts will change since they are being calculated at the item level. Note: If a document contains more than one language, it is included in more than one language filter. Language filters may not appear if your case contains only one language.

Search Filters

Filter Name	Filter Count Based on Item, Document or Both	Guidelines
Message Flag	Document	Includes documents with message warnings that were identified during processing, such as a missing sent time in email messages or errors in processing attachments. Starting with release 7.1.5, if you have Rights Management enabled, RMS decrypted content counts in the following categories are identified: • Decrypted Items Protected by RMS • Decrypted Attachment by RMS Note: You may notice a difference in exception counts between your search results and those listed on the Exceptions screen. This is because the search filter accounts for every message containing a file (applied with a particular warning) <i>only once</i>, while the Exceptions screen displays every <i>occurrence</i> of a file with a warning, as the same file could be contained in multiple messages. (See File Flag entry for an example of how files are counted.) If there are two messages, each of which contain the same attachment, and that attachment has a warning, the filter for that warning increments once for <i>each</i> of those messages.

Search Filters

Filter Name	Filter Count Based on Item, Document or Both	Guidelines
File Flag	Item	Includes items with file-related issues that were identified during processing, such as empty or corrupt files, hidden content, or embedded content. • For loose files, if the administrator has defined file owners, then the sender name is the file owner. File counts are incrementally counted following these general rules: • If a message has two attachments, and both attachments have the same warning, the item count would be two. • If a message has two attachments, but each contains a different warning, the filter for each warning is incremented.
Production Slipsheet	Document	Includes a list of documents that fail to image during production. The production slip sheet filter identifies the number of failures and separates them into error categories to provide a better understanding of the underlying cause for the failure. For example, you can differentiate between slip sheets that were generated due to an unsupported document type (EXE, DLL) versus slip sheets generated on supported documents that encountered specific processing issues. Some of the slip sheet reasons include: Non-Imageable File, Unexpected Error, Empty File, and Invalid Document. Note: The Production Slipsheet filter only displays when you run search on production folder data. For more information, see "Viewing Production Slip Sheet Reports" in the Export and Production Guide.

6. To clear the current filters, click **Clear**.

To view all tagged or untagged documents

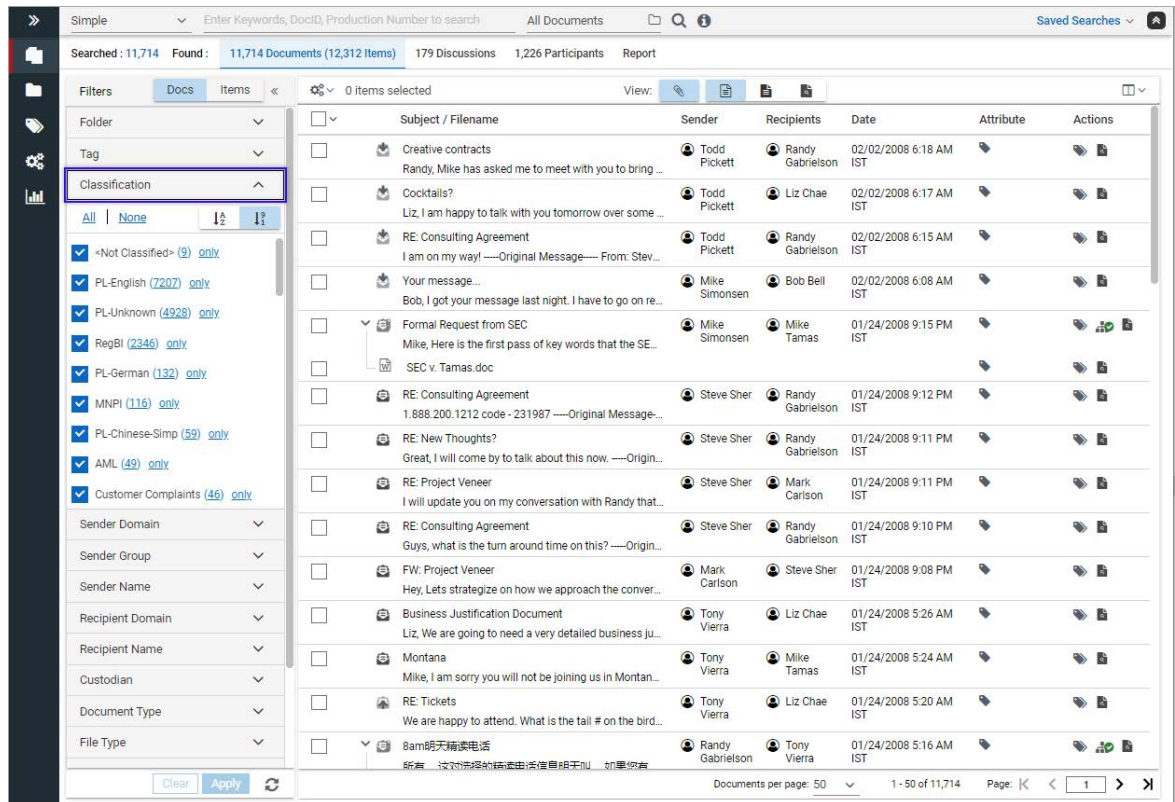
1. From **Analysis & Review**, select your document folder or run your search query.
2. In the Filters pane, expand the **Tag** filter.

All items are grouped by their tag. Untagged items can be viewed by clicking the number of items that are <Not Tagged>.

Classification Information

Note: If you are not familiar with basic classification operations and terminology, see Veritas Information Classifier Help.

Using Classification Information in eDiscovery



To identify and use classification information

1. After all the data has been processed into a new case, navigate to **Analysis and Review** and click **Search**  icon to return all documents within the case.

In the filters area, you will have a Classification section. Expand the Classification filter section to see all the tags for every policy that was enabled and has at least one matching document. If a document matches more than one policy or is marked with multiple tags from one policy, it will be presented under each corresponding tag.

2. Information Classification policy tags function just like any other filter tags. You can select a single tag or multiple tags and then click the **Apply** button at the bottom of the filters or click on the number directly next to the filter to return only those matching documents.

Tips for Exporting Classification Information

- The information classification policies are stored as system level tags within the eDiscovery Platform.
- During metadata and production export user should select the **Include all tags** option in order to get classification tags exported. Unlike user tags, classification tags are not available for selection and are not be visible in the left-hand side pane where all user tags are displayed. But once the **All tags** are included in export options, classification tags will be exported and populated in the export load file.

Using the Search Reports Screen

The Search Report provides information on the specified search criteria and results of a search and includes the following sections:

- **Search Report**—Lists information related to the case and search query including all of the specified search criteria. By default, the keywords used in a search are shown and all other search criteria are hidden. Click **Show Search Details** to show all of the specified search criteria.

Click **Report** under the **Analysis & Review** module

- **Results**—The results section provides the following item counts:

Total Item Counts

Item	Results
Documents	Total number of email messages and loose files
Email Messages	Email messages and their attachments (note that an email with 2 attachments counts as a single email)
Attachments	Total number of files attached to email messages
Loose files	Files that are not attached to email messages
Embeddings	Total number of files embedded within loose files and attachments
Reviewable items	Total number of email messages, attachments, loose files, and embeddings
Matching (emails)	Email content that matches the search criteria
Matching (unique files)	The number of unique files, which can be attachments, loose files or both, whose content matches the search criteria
Matching (emails)	Email content that does not match the search criteria but has an attachment whose content does match
Non-matching (unique files)	The number of unique files whose content does not match the search criteria but is attached to an email whose content does match the search criteria
Total (files)	The sum of Matching and Non-matching files returned by the search query
Discussions	Total number of email discussion threads
Topics	Total number of groupings of conceptually similar email messages
	Note: This functionality only applies to topics in pre-7.0 cases that upgrade.

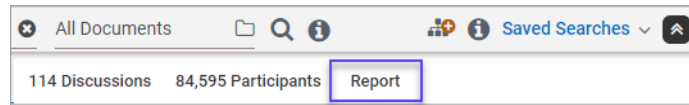
Total Item Counts

Item	Results
Participants	Total number of unique email addresses which have sent and/or received email messages. Note: When exporting a search report with more than 50,000 recipients, you must save the report in CSV format (not the default XLSX format). See KB Article Tech197513 for details. The KB article is located at http://www.veritas.com/docs/TECH197513
Unique Files	Total number of unique files in the search results. A unique file can be an attachment that is attached to multiple emails and/or a loose file. These attachments or loose files have the exact same content but may have different file names or modified dates.

Viewing the Reports

To view the Search Reports screen

1. Click **Report** under the **Analysis & Review** module.



The Search Report opens.

2. View the search results information.

Exporting Search Report Results

Once you have your search results, you can export them as a report in Microsoft Excel (XLSX) format. The report contains all visible data on the Search Report page and all the file value data shown in the Filter Search Results panel (See “Filtering Search Results”) on the documents page. The report filename uses the creation timestamp as part of the name to uniquely identify it. Once the data is in the report (excel format), you can further analyze the results, apply filtering or graphically display the data in different ways.

Considerations

- The default search report format for export is XLSX.
- When exporting a search report with more than 50,000 recipients, you must save the report in CSV format (not the default XLSX format). See KB Article Tech197513 for details. The KB article is located at <http://www.veritas.com/docs/TECH197513>.

To export the Search Reports results

1. From the search results screen, click **Export Report**.

	A	B	C	D	E
1	Search Summary Report				
2	Report created on	Thu Oct 18 2012 16:06:33 PDT			
3					
4	Search Details				
5	Case Name	PC v Tamas Corp			
6	Search Name	Entire Corpus			
7	Notes	Entire Corpus			
8	Documents Searched	14168			
9	Total Volume	340.2 MB			
10					
11	Additional Details				
12	Entire Corpus				
13					
23					
24					
25					

The Search Report in XLSX format opens.

2. Select the appropriate tab and worksheet to view the results. The report data is divided into the Search Report worksheet tabs listed below.

Search Reports

Report Name	Description
Search Summary Report	Summary page with the following information: – Report Creation—Timestamp of the report – Case Name—Name of the case – Search Name—Indicates the keywords of the search – Notes—Save search description – Documents Searched—Number of documents searched – Total Volume—Total volume in MB – Additional Details—Added characteristics of the search (For example, Keywords, Scope, Stemmed, and Fields to Search)
Results	Divides all search item count results into the following categories: – Matching – Non-Matching – Total Lists total counts for: – Discussions – Participants – Unique Files
Keywords	Lists the results of: – Keywords according to item counts – Variations searched for – Variations not searched for
Filters	Provides a list of: – Filter—Type of filter – Name—Name of filter – Document Count—Number of documents – Item Count—Number of items
Definitions	Provides an explanation of the various counts. See “Total Item Counts” on page 71 .

Keywords Search Report

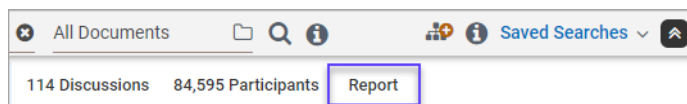
The Keyword report section shows the number of documents that each keyword query would match if run individually. Similar to the Results section, the Keywords section displays all occurrences of a keyword search request and provides a total count under the data categories of Email Messages, Loose Files, Documents, Attachments, and Reviewable Items.

To see additional details on the keyword query, click **Show Keyword Detail**. The keyword details shows the stemmed or wildcard word variations that were searched or not searched for based on the selections made using the Search Preview feature. If all you need are the keywords and not the keyword variations, then select the **Normal filter and count generation** option in the **Filter and Count Generation** on the Advanced Search page. Otherwise, if you check **Generate keyword details for filters and report** for a search, then the Keyword Details section will include a results section that lists all the expanded keyword queries and the number keywords that match the query. The total keyword matching counts are listed under the appropriate item category.

Depending on your requirements, you may want to produce reports to track the keywords selected for reducing your data, to meet obligations to preserve relevant evidence, or to identify privileged or confidential documents. When you initiate a keyword search, the keyword results are returned in either a basic (keywords and keyword totals) or a more detailed (keywords, keyword variations and total counts) format. When you select the **Export Keywords** report option the results are viewable in (XLSX format) Microsoft Excel.

To view the Keyword Details Search Report Results

1. Click **Report** under **Analysis & Review** module.



The Search Report displays.

2. View the keyword search results information.

Keywords							Search Hit Report	Export Keywords
Keywords	Email Messages	Loose Files	Documents	Attachments	Embeddings	Reviewables Items		
diamond	713	9	1139	432	4	1158	Show Keyword Detail	

- To view more details such as the keyword variations, click on **Show Keyword Detail**. The Results section (highlighted) displays if you select the **Generate keyword details for filters and report** Advanced Search option under the Filter and Count generation in the Keywords section.

Keywords

Search Hit Report

Export Keywords

Keywords	Email Messages	Loose Files	Documents	Attachments	Embeddings	Reviewables Items
test	342969	89	421723	122181	11127	476366

Hide Keyword Detail

Results:

test	231393	55	292819	89976	7245	328669
testing	177525	34	228725	71026	6092	254677
tested	49013	33	68596	22928	1609	73583
tests	34030	25	48897	18634	1244	53933
testings	121	0	195	86	0	207
testes	75	4	138	59	0	138
teste	27	3	121	91	0	121
testting	7	0	8	1	0	8
testted	0	0	1	1	0	1

Variations searched for:

test (stemmed) test, teste, tested, testes, testing, testings, tests, testted, testting

Not searched for:

test (stemmed)

Exporting the Keywords Report

Once you have the keyword search report results you need, you can easily export them to a Microsoft Excel spreadsheet. You have a choice of either exporting a basic report that contains just the matching keywords and the item count totals or a report that has both the matching keywords along with the corresponding keyword variations. Both reports show the keyword count results for each item category.

Note: See *"Considerations" on page 74* for exporting reports.

Generating a keyword

If all you need to search are the keywords and not the keyword variations, then select the **Normal filter and count generation** option in the **Filter and Count generation** section on the Advanced Search page. Otherwise, select **Generate keyword details for filters and report**.

To export the Keyword Detail report

- Click **Export Keywords** in the Keywords section.
- View the results in a Microsoft Excel (XLSX format) spreadsheet.

Search Hit Report

This report includes information about keyword hits in your collection data. Use this report to map Doc IDs to keyword hits. Since the keyword filter is item-based, the counts are also item-based. To be included in the report, the keyword search results must return at least one keyword that is a hit.

Note: The report requires that the Advanced Search option **Generate keyword details for filters and report** option be selected.

To create the Search Hit Report

1. Click **Search Hit Report** in the Keywords section. This submits a job to generate the Search Hit Report. This Report will include all the searchable Doc IDs corresponding to every query line. Once the job successfully completes, you can view the report.
2. View the results in a Microsoft Excel spreadsheet.

The following is a sample of the Search Hit report:

	A	B	C	D
1	Searchable Doc ID	fail AND test	energy AND cat	
2	0.7.19.6320	X		
3	0.7.19.7025	X		
4	0.7.19.6358	X		
5	0.7.19.6376	X		
6	0.7.19.7121	X		
7	0.7.19.6231	X		
8	0.7.19.6283	X		
9	0.7.19.10265		X	
10	0.7.19.9166-000001	X		
11	0.7.19.10953	X		
12	0.7.19.10954	X		
13	0.7.19.10952	X		
14	0.7.19.10916	X		
15	0.7.19.10951	X		
16	0.7.19.10950	X		
17	0.7.19.10905	X		
18	0.7.19.10904	X		
19	0.7.19.10915	X		
20	0.7.19.10946	X		
21	0.7.19.10218-000001	X		
22	0.7.19.10196-000001	X		
23	0.7.19.10196-000002	X		
24	0.7.19.10196-000003	X		
25	0.7.19.10231-000001	X		

Search Hit Report

Advanced Search

This chapter provides a comprehensive overview of the advanced search capabilities of the Veritas eDiscovery Platform. This section is intended for end users who want to run advanced searches using search query syntax.

Refer to the following search types:

- [“Advanced Searches: Overview” on page 80](#)
- [“Stemmed Searches” on page 81](#)
- [“Boolean Searches” on page 82](#)
- [“Wildcard Searches” on page 83](#)
- [“Phrase Searches” on page 84](#)
- [“Proximity Searches” on page 85](#)
- [“Transparent Searches” on page 87](#)
- [“Participant Searches” on page 95](#)
- [“Freeform Searches” on page 98](#)
- [“Freeform Searches” on page 98](#)
- [“Journal Envelope Message Searches” on page 105](#)
- [“Email Header Searches” on page 107](#)
- [“Reason Code Tag Searches” on page 111](#)

Refer to the following related advanced search topics:

- [“Non-English Language Searches” on page 112](#)
- [“Punctuation Searches” on page 114](#)
- [“Search Examples” on page 116](#)
- [“Frequently Asked Questions” on page 117](#)

See also:

- [“Search Reference” on page 118](#)

For information on how to perform basic or advanced searches, or for keyword quick references, see [“Search” on page 23](#).

Advanced Searches: Overview

Review the following general notes about advanced searches:

- Searches involving Boolean, phrase, wildcard, or proximity queries can be entered into the *Basic Search* field, or *Any of these words* field on the Advanced Search screen. These types of searches are generally not supported in other fields within Advanced search.
- The size of the input fields on the Advanced Search screen will grow as you add text.
- If you enter words in more than one field on the Advanced Search screen, the search results include only documents that match all of the fields. Each term is ANDed with every other term in the search.

Example	Search Results
<i>Any of these words</i> field: energy <i>The exact phrase</i> field: nuclear power	Find items that include the word "energy" and also include the phrase "nuclear power"

- All searches from the Basic Search field and Advanced Search screen are case insensitive. Operators (e.g. AND, OR, NOT) must be uppercase. In email and file content, the product will index certain punctuation characters and treat others as spaces in order to make as many words searchable as possible. Treatment of punctuation characters has changed since version 4.5. Please refer to the Appendices for additional information.
- As of version 4.5 and beyond, all words are indexed. In prior versions, stop words (such as "and" and "the") were ignored unless they are included in exact phrase searches with one or more additional search terms. All cases started in those versions will continue to ignore stop words.
- Search queries without any advanced operations are limited to approximately 8,000 terms. This limit is lowered when searches include wildcard or proximity queries.
- Starting with 7.1.2 Fix 2, you can do advanced searches based on Journal envelope information, and view "Bcc" information and the expanded distribution lists (after processing, in the Analysis & Review module).
- MSG journal support is only available for cases created on V8.0 onward. EML journal support is only available for cases created in V8.1.1 onward. If your case was originally created on earlier versions of the product the search and any EML functionality is not be available.

Stemmed Searches

Stemmed searches find variations of words such as plurals or alternative verb forms. For example, if you search for “test”, stemming will also find instances of “tests” and “testing”. The Basic Search field always uses Stemming. In the Advanced Search screen, you can choose whether to run a stemmed search or a literal search by using the Search all variations of the keyword terms (stemmed search) check box.

Additional Notes

- Terms contained in the To, From, CC, BCC, and attachment/file name fields in an email and the filename of loose files are not stemmed during processing in order to reduce false positives. See the FAQ on Stemming vs. Wildcard searches for more information.
- The product supports stemmed searches in English, Dutch, French, German, Italian, Japanese, Korean, Portuguese, Russian and Spanish. By default, only English words are stemmed. Stemming for additional languages is controlled by your administrator. When stemming is configured for more than one language, the system will perform stemming for all languages on each submitted term. For example, if you enter restaurant and both English and French stemming is configured, then the system will search for both English and French variants of this term. Note that the product does not perform any language translation.
- The product supports two methods for supporting stemmed searches in English: linguistic stemming and suffix-based stemming. Linguistic stemming uses part of speech analysis to determine stemming rules. For example, this option considers “went” as a variant of “go.” Suffix-based stemming uses the Porter algorithm to strip out common word suffixes (such as “s” or “ing”). This algorithm is useful for finding nouns in their plural and singular forms. Both methods are configured by default.

Boolean Searches

Refer to the following topics in this section:

- [“Logic Operators” in the next section](#)
- [“Grouping” on page 83](#)

Logic Operators

Individual query terms can be combined together into more complex search requests by using logic operators. The following table describes the available logic operators. The text operators, OR, AND, and NOT must be entered in uppercase.

Logic Operators

Operator	Description
OR	Includes documents that contain either of the terms connected by the OR. The OR operator is the default conjunction operator. This means that if there is no operator between two terms, the OR operator is used.
	<i>Example</i>
	Search for either coffee or tea
AND	Includes only documents that contain both terms connected by the AND.
	<i>Example</i>
	Search for espresso and cappuccino
NOT	Excludes documents that contain the term after the NOT operator.
	<i>Example</i>
	Search for “french roast” but not decaf
NOT	Note that the NOT operator cannot be used with just one term. For example, the following query entered with no other search criteria will not return any results, even if one or more documents do not contain the term chai: NOT chai
	Like AND searches, NOT searches will treat messages and attachments as separate documents. In the example above, an email whose message body contained “french roast” and decaf but whose attachment contained “french roast” but did not contain decaf would still be included in the search results.
	Note that keywords entered in the None of these words field in the Advanced Search screen behave differently from keywords after the NOT operator. A search using None of these words will exclude messages if the email body or any of the attachments match the specified query. In the example above, an email whose message body contained “french roast” and decaf but whose attachment contained “french roast” but did not contain decaf would be excluded in the search results.

Grouping

Use parentheses to group clauses to form sub-queries and control the Boolean logic for a query.

Example	Query Syntax
Search for either coffee or tea and the word milk	(coffee OR tea) AND milk

Wildcard Searches

Use a ? for single character and a * for multiple character wildcard searches. Wildcard characters can be used in the beginning, middle or end of a term.

Refer to the following topics in this section:

- [“Single Character Wildcard” in the next section](#)
- [“Multiple Character Wildcard” on page 83](#)

Single Character Wildcard

The single-character wildcard matches on any single character in the wildcard position.

Example	Query Syntax
Search for text or test	te?t

Multiple Character Wildcard

The multiple character wildcard searches matches on zero or more characters.

Example	Query Syntax
Search for test , tests , or tester	test*

Additional Notes

- The use of wildcards is not supported when used in conjunction with non-indexed characters, such as leading or trailing punctuation characters. See the Appendices on tokenization for more information on which punctuation characters are indexed and searchable.

- Wildcards can be used in the following Advanced Search fields:
 - Keywords Section
 - Any of these words, All of these words, None of these words
 - Identifiers Section
 - Source name and location
 - Email Section
 - Subject
 - Attachment/File Section
 - Any of the words
- Hit highlighting of wildcard terms via the Advanced Freeform search page is not supported.
- Searches containing non-ASCII characters and wildcards could return an error due to too many results. If this error occurs, group the non-ASCII characters and wildcards in angle brackets. This prevents the wildcard from running as a separate search.

Phrase Searches

A phrase is a group of words enclosed in double quotation marks. Phrase searches will find documents containing the terms within the quotes in the same order with no intervening other terms.

Example	Query Syntax
Search for the exact phrase: grande latte	"grande latte"

Additional Notes

- Phrase searches can be run as stemmed or literal searches. For example, if run as a stemmed search, the phrase "energy policy" will match "energy policies" as well as "energy policy". Phrases entered in Basic search are automatically run as stemmed searches. The Basic Search field always uses Stemming. In Advanced Search, you can choose whether to run a stemmed search or a literal search.
- Searches using the Exact Phrase field on the Advanced Search page do not support the same functionality as Phrase searches using quotes entered into the Any of these words field. For example, you cannot use wildcards in the Exact Phrase field. For complex queries, it is recommended to use phrase searches in the Any of these words field instead of the Exact Phrase field.

Proximity Searches

Proximity searches find words that have a specific number of intervening words. When performing proximity searches, the word order in the phrase does not matter. The product supports proximity searches containing two or more terms. You can perform a proximity search two ways:

- Separate search terms with w/n.

Example:

budget w/10 issues

Note: Because w/n is now an operator, searches containing the string, w/n, are interpreted as proximity searches. Verify that the saved searches of upgraded cases are not impacted. Upgraded cases containing saved searches with the string, w/n, may result in an error. Saved searches with the string, NOT w/n, are now run as a proximity search.

- Add a tilde (~) at the end of a phrase (quoted string) followed by the total number of other words that are allowed to come between the words in the phrase.

Example:

"budget issues"~10

Both searches will find documents where there are 10 or fewer intervening words between "budget" and "issues" or where there are 10 or fewer intervening words between "issues" and "budget."

Note: Wildcard characters (* or ?) can be used within proximity searches only in Basic search and the Advanced search Any of these words fields.

Additional Notes

- The product's proximity search specifies the number of intervening words allowed between terms. Users who are running searches for others should verify with the search author as to how many intervening terms they want between the words.
- Proximity search is limited to certain fields or regions within email messages and does not span email messages and attachments. For example, proximity searches do not span the Recipient (To) and subject metadata fields or the subject and body regions of an email. Proximity searching does not span email or attachment boundaries. The section "[Freeform Searches](#)" on page 98 contains a list of regions within emails.
- Hit highlighting for proximity searches is not limited by the proximity number.
- Search area for proximity search is limited to single page.
- All the words involved in proximity search are hit highlighted
- Proximity searches can be used to find specific number sequences, such as phone numbers or social security numbers when written according to the following example:

<???-??-????> w/12 "social security"

This example will find a social security number in proximity to the phrase “social security”. You may want to consider cases where “SSN” or no text at all is near the social security number. See [“Social Security Numbers Search String” on page 120](#). Be aware that this search can yield false positives.

Note: Note: Using wildcards alone may match similar unwanted text combinations, such as the phrase “one-to-many”. However, grouping the wildcards with proximity search phrasing will reduce the number of false positives in your results.

- When constructing proximity searches using the tilde format, there should be no spaces between quote marks, ~, or proximity number. For example, “budget issues” ~10 will not be recognized as a proximity search.

Nested Proximity Searches

Nested proximity searches combine two query types, proximity and grouping. Examples of nested proximity searches include:

Example Nested Proximity Search Syntax	Search Results
“apple pie” w/5 (“strawberry cheesecake” w/10 “apple tart”)	Finds all documents that contain all three phrases “apple pie”, “strawberry cheesecake” and “apple tart” which contains at least one occurrence of “strawberry cheesecake” that is within 10 words of “apple tart” which is also within 5 words of “apple pie”.
NOT (“apple pie” w/10 “apple tart”)	Excludes all documents that contained the phrase “apple pie” within 10 words of “apple tart”
“blueberry scone” NOT (“apple pie” w/10 “apple tart”)	Finds all documents that contained the phrase “blueberry scone” but by contrast, did not also contain “apple pie” within 10 words of “apple tart”.
NOT “blueberry scone” NOT w/10 “apple tart”	Finds all documents that contain the phrase “blueberry scone” in which “blueberry scone” does not appear within 10 words of “apple tart”.

Transparent Searches

Transparent Search is designed to provide deep visibility into how searches are performed in order to improve the ability to cull irrelevant information. Transparent Search makes it easy to follow search best practices including search query testing, sampling and refining. Transparent search is comprised of four features.

- Search Preview - Provides visibility into matching keyword variations for wildcard and stemming searches prior to running a search. You can selectively include relevant variations or exclude false positive variations in the search query, removing irrelevant documents from search results.
- Multiple Query Analytics - Allows you to run multiple queries as part of a single search and get analytical data for each individual query as well as all queries combined.
- Search Filters - Enables filtering of search results based on individual queries or variations within a multi-query search allowing you to sample and test the results for each query in a multiple query search.
- Search Report - Creates a comprehensive report that documents all search criteria, including selections from search preview, and provides detailed analytics of the results for both the overall search and the individual queries within the search.

Refer to the following topics in this section:

- [*"Using the Search Preview Feature" in the next section*](#)
- [*"Using Multiple Query Analytics" on page 88*](#)
- [*"Running Transparent Searches" on page 90*](#)

Using the Search Preview Feature

The search preview feature can be accessed by clicking on the icon to the right of the Any of These Words field on the Advanced Search page.

The search preview window shows all the variations for each wildcard or stemmed keyword within your search query. For example, if the query contains the keyword *hir**, the window will show all terms within your data set whose first three characters are *hir*. If you have selected the Search All Variations of the Keyword Terms (Stemmed Search) option then the search preview window will display all stemmed variations of that term. Search preview allows you to select or de-select each shown variation including the relevant ones and excluding the non-relevant, false positive variations.

Only selected variations will be included in the search. If you do not open the search preview window and run a search with wildcard or stemmed keyword variations, then the search will run as if you had selected all variations.

Additional Notes

- The search preview feature is not available for literal searches without wildcards.

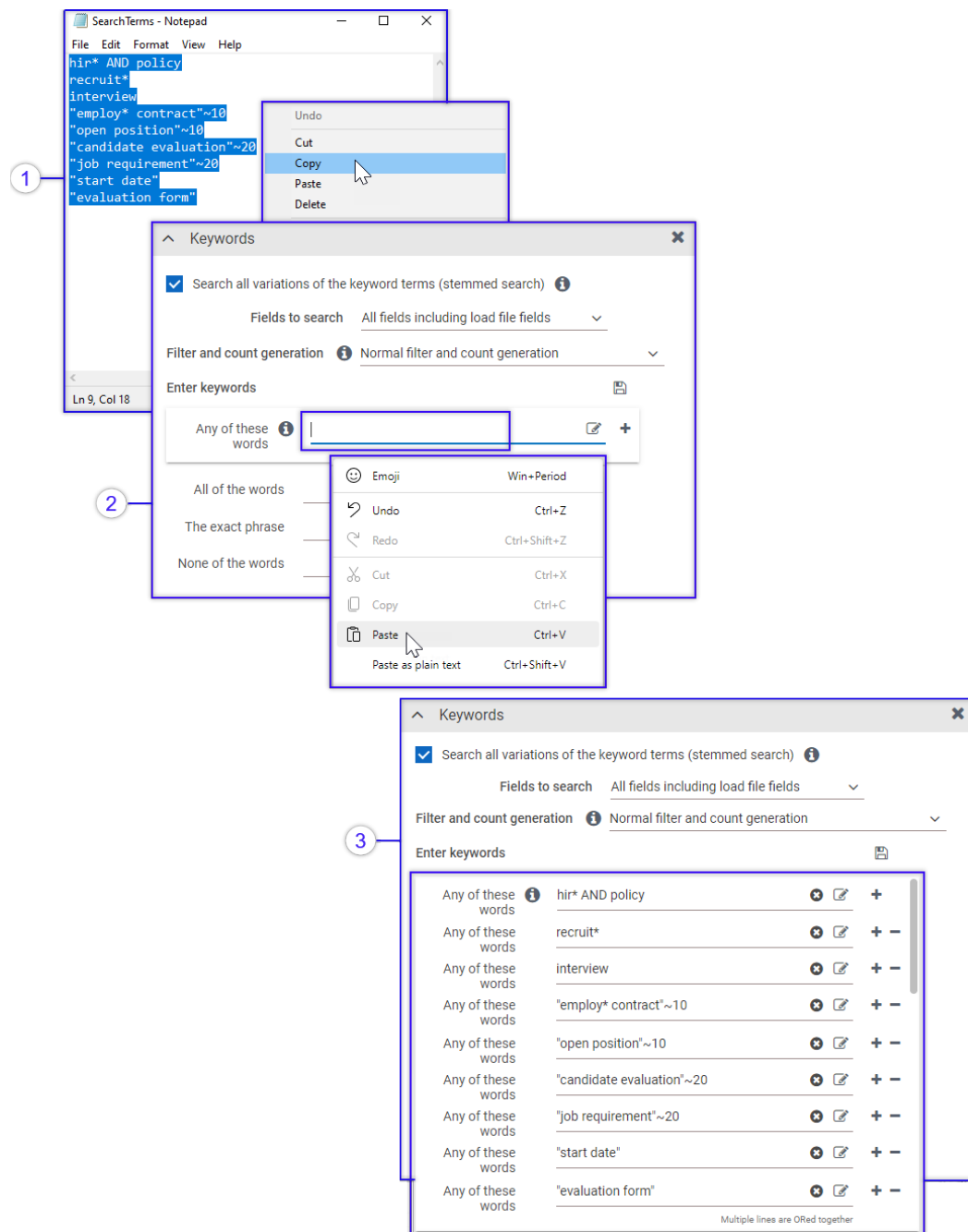
- Because terms within the To, From, Cc, Bcc, and attachment/file name fields are not stemmed, selected stemmed variations will not be searched within those fields. Only the unstemmed keywords entered into the Any of These Words field will be searched for within those fields.
- The counts in the search preview window are not affected by the Fields to Search setting or by visibility filters.

Using Multiple Query Analytics

Transparent Search supports the ability to simultaneously run multiple queries and provide filters and analytics on each individual query plus the combination of all submitted queries. You can create a search with multiple queries by adding multiple query rows. A query row is an additional Any of These Words field on the Advanced search page and can be created by clicking on the + icon.

The screenshot shows a search interface titled 'Keywords'. It includes a checkbox for 'Search all variations of the keyword terms (stemmed search)' which is checked. Below this are two dropdown menus: 'Fields to search' set to 'All fields including load file fields' and 'Filter and count generation' set to 'Normal filter and count generation'. The 'Enter keywords' section features a text input field with the placeholder 'Any of these words' and the text 'hir* AND policy'. To the right of the input field is a '+' icon in a square box, which is highlighted with a red rectangle. Below the input field is an 'Add Row' button. At the bottom of the form, there are three radio button options: 'All of the words', 'The exact phrase', and 'None of the words', each followed by a text input field.

You can also create multiple query rows by (1) copying searches from text in another application and (2) pasting that text into the Any of These Words field. (3) A query row is created for every line of copied text.



Additional Notes

- The number of query rows allowed in a search is limited to 100.

Running Transparent Searches

You can run a Transparent Search that includes only your selected variations for each query by clicking **Search**. This will produce filters and report analytics for each query contained in the submitted search. You can generate more detailed filter and report analytics for each selected variation combinations by checking the Generate Keyword Details for Filters and Report.

Filter and Count Generation options within the Advanced Search window

Filter and Count Generation Options

- Limit filter and count generation for improved search speed.

If selected, Sender, Recipient and Keyword filter information will not be generated. In addition, the Participants page will not be available and the Search Report will not display keywords or counts. To see this information, you may re-run the search at any time without this option selected.

- Normal filter and count generation.

Creates a filter for each search term entered, however, it does not create a filter for the expanded, wildcard matches of the search terms.

- Generate keyword details for filters and report.

Creates filters for the search terms and all wildcard matches of the search terms.

Note: It takes significantly more resources and time to run searches with the **Generate Keyword Details for Filters and Report** option selected. The performance of a search with this option checked is affected by the number of keywords within an Any of These Words query row field and the number of query rows. Currently, these searches are limited to 10,000 keyword combinations, which might take approximately 20-30 minutes to run. Keyword combinations are the number searches that are generated from a search using wildcards or stemming. For example, if the term `hir*` expanded to `hire` and `hired`, then the search `hir* AND policy` would have two keyword combinations: `hire AND policy` and `hired`

AND policy. Searches that exceed that number of combinations and are likely to take longer to run will produce an error similar to the following: "Term expansion combinations count of [X] exceeds the limit of 10,000. Reduce selected expansions or disable keyword details."

Running Transparent Searches - Search Jobs

If the system determines that the search is large, the system automatically creates a job for the search, which is run in the background as shown below. When a search runs as a job, the results of the search are calculated and saved with the search in order to enable quicker access to the results of large searches.

Search jobs run in the Searches area on the Documents screen and are shown with a spinning magnifying glass icon and a Cancel option. Completed search jobs have a grayed magnifying glass icon and Edit and Refresh options. The results of a completed search job can be accessed by clicking on the search name. Searches that are not run in the background as jobs are indicated by a non-colored magnifying glass with an Edit option.

Additional Notes

- If additional documents are processed or additional tags have been made and the search contains tagging search criteria, then the results of the search job can become "stale" or out-of-date. You can either review your saved results or re-run the search to update the results by clicking on the search job as shown above.
- The system will save the results of up to 50 search jobs. After the 50th search is reached, the system will delete the results associated with a job but not the query. You will still be able to access the results of a search by clicking on the search in the Searches window, but you will only be able to re-run the search. You will not be able to access the saved results.
- Saved results in search jobs are not affected by visibility filters. If this is a concern, save these searches as Private Saved Searches.

Using Keyword Query Filters

The product generates keyword query filters for each search. These filters are item-based and enable you to restrict your overall results to the documents that match a single query row within your Advanced search. To quickly filter search results, simply select the filter and click **Apply**. In the following example, selecting `hir* AND policy` restricts the filtered results to the 24 documents that only match the query.

Filters Docs Items «

Recipient Name ▾

Custodian ▾

Keyword Query ▴

[All](#) | [None](#) [Expand All](#)

> interview

> recruit*

▼ hir* AND policy

☒ hir* AND policy (24) only

> "open position"~10

> "employ* contract"~10

> "job requirement"~20

> "start date"

> "candidate evaluation"~20

Document Type ▾

File Type ▾

Document Size ▾

Language ▾

Message Flag ▾

File Flag ▾

[Clear](#) [Apply](#) 

Filters Docs Items «

Recipient Name ▾

Custodian ▾

Keyword Query ▴

[All](#) | [None](#) [Expand All](#)

> interview

> recruit*

▼ hir* AND policy

☒ hir* AND policy (27 items) only

> "open position"~10

> "employ* contract"~10

> "job requirement"~20

> "start date"

> "candidate evaluation"~20

Document Type ▾

File Type ▾

Document Size ▾

Language ▾

Message Flag ▾

File Flag ▾

[Clear](#) [Apply](#) 

You can also build complex filters using multiple criteria. In this example, one Sender Domain filter value has been checked and the Keyword Query filter for the search `hir*` AND policy has been unchecked. This will filter results to find emails sent from the selected domain and will not include emails that only match the `hir*` AND policy query.

The screenshot shows the 'Filters' panel in a search interface. The 'Items' tab is selected. The 'Sender Domain' filter is expanded, showing a list of domains with checkboxes. The 'southrange.com' filter is checked and highlighted in yellow. Below it, the 'Keyword Query' filter is expanded, showing a list of queries with checkboxes. The 'hir* AND policy' filter is unchecked and highlighted in yellow. At the bottom of the panel are 'Clear', 'Apply', and a refresh icon.

Filter Category	Filter Name	Count	Status
Sender Domain	teneo-test	25 items	Unchecked
	southrange.com	23 items	Checked
	baylor.edu	12 items	Unchecked
	Internal	11 items	Unchecked
	cw-test	4 items	Unchecked
	bracepatt.com	4 items	Unchecked
	brownmartin.com	3 items	Unchecked
	wsj.com	3 items	Unchecked
	ebay.com	2 items	Unchecked
Keyword Query	recruit*	-	Expanded
	hir* AND policy	27 items	Unchecked

Highlighted filters applied to the search

Selecting the **Generate keyword details for filters and report** option when you perform your search will generate additional keyword query filters. For example, without this option, you have the option to filter on all of the documents that match the query `hir*` AND policy. With this option selected, you also have the ability to match all of the query expansions of this query, such as `hired` AND policy or `hire` AND policies.

Keyword Query ^

[All](#) | [None](#) [Expand All](#)

> recruit*

v hir* AND policy

☒ hire AND policy (20 items) [only](#)
☒ hire AND policies (18 items) [only](#)
☒ hiring AND policies (16 items) [only](#)
☒ hiring AND policy (15 items) [only](#)
☒ hired AND policies (11 items) [only](#)
☒ hired AND policy (11 items) [only](#)
☒ hires AND policies (5 items) [only](#)

Using the Search Report

The Search Report provides information on the specified search criteria and results of a search. For more information, see [“Using the Search Reports Screen” on page 71](#).

Search Report

Tue Mar 08 2022 23:01:55 IST

Export Report

Case Name	Classification
Search Name	[Any: [hir* AND policy]][Stemmed][Detailed Keyword Report: Yes] in [All fields]
Documents Searched	11714
Total Volume	11 MB
Notes	[Any: [hir* AND policy]][Stemmed][Detailed Keyword Report: Yes] in [All fields]
Keywords	Any of these Words hir* AND policy
Hide Search Details	
Scope	All documents
Stemmed	Stemmed
Detailed Keyword Report	Yes
Fields to Search	All fields

Results

Please note that report only reflects the results of your original search, and is not affected by any filters that have been applied.

	Documents	Email Messages	Attachments	Loose Files	Embeddings	Reviewable Items	Discussions	Participants	Unique Files
Matching	24	8	18	1	0	27			
Non-Matching	0	15	11	0	3	29			
Total	24	23	29	1	3	56	3	61	31

Keywords

Search Hit Report

Export Keywords

Keywords	Email Messages	Loose Files	Documents	Attachments	Embeddings	Reviewables Items	
hir* AND policy	8	1	24	18	0	27	Show Keyword Detail

The Search Report has three sections: Search Report, Results, and Keywords

Additional Notes

The information listed in the Search Report is not affected by any applied or saved filters

Participant Searches

There are two ways to perform a participant search on the Advanced Search page. The Participants search area is an expandable alternative to using the static keyword search fields on the left side (such as “Any of these words”), allowing users to perform a more robust participant search.

Using the Participant search feature provides greater control and flexibility in the types of searches you can perform. A complex participant search can be expanded using multiple rows, each of which contains three drop-down boxes and a text field.

- General Rules - Multiple names, email addresses, or domains must be separated by semicolons (;).
- Email Addresses - To search for an alias, enter alias(<aliasname>) (or click to select any email address (primary or secondary) for any known participant.
- Participants - The name order is not critical. To find all documents sent or owned by a participant, enter the first, last or last, first:

Example	Query Syntax
Search for the participant: john smith	john smith or smith john

- Domains - If entering a partial domain, specify the right-most portion of the name, and include the full text between period delimiters.

Example	Query Syntax
[Broad]: Search all documents from: yahoo	yahoo.com [includes all yahoo domains, including yahoo.com and segments such as images.yahoo.com (but not images.yahoo.co.uk)]
[Narrower]: Search all documents from: images.yahoo.com.hk	images.yahoo.com.hk [includes only the images.yahoo.com.hk domain]

Field/Option	Description
Any/ and any/ or any/ not any	Finds documents that have the specified participant names, email addresses, or domains according to the following operators: • any (in the first row) specifies that for the text entered, only one of the criteria must match in a document for the entire row to be considered a match. • and any specifies that the criteria in that row are required in the search. • or any (in subsequent rows) is optional, indicating that the same documents can contain the text entered in that row. (However, one row must be required if all others are optional.) • not any indicates that the documents must not contain the (prohibited) criteria that follow in that row. (If documents contain any participants in a prohibited row, those documents will not appear in your results.)
(All)/ (Recipients)/ From/ To/ Cc/ Bcc	Finds documents that have the specified names, email addresses, or domains according to the following rules: • (All) searches all fields: From, To, Cc, or Bcc (fields are blank on loose files). • (Recipients) finds documents in the To, Cc, or Bcc fields. • To search any single sender or recipient field, select From, To, Cc, or Bcc. These fields represent the specified individual and search all documents from all of that individual's email addresses.) • If the "Search in contained senders and/or recipients" option is selected, the equivalent contained fields are also searched. Note: See Participants/E-mail address/Domain name field options for usage.
Participant/ E-mail address/ Domain name	Specifies the search type: • Participant - searches for all documents from an individual by primary email address. Results will contain the primary email address of the selected participant. (A participant search on a secondary email address will not return any results.) Note: The "primary" email address is determined by the first address found for a given participant when data is indexed. • E-mail address - searches for documents with an exact match of the original email address (finds all messages from or to a single email address). The email selector can be used to identify documents from the participant with the exact email address. • Domain - searches for documents with part or all of a domain from the original email address. (Sender and recipient domains are generated using the original email address domains so that the domain will appear in the appropriate field of the filtered documents in your results.) Note: See Additional Notes.
Search in contained senders and/or recipients (Checkbox)	
	Finds messages with senders or recipients that are in contained emails (email messages that have been replied to or forwarded)

Additional Notes

- **Differences between the two participant search methods.** Searches executed from the left side of the Advanced Search screen are broader in scope. Participants are included if "All fields" is selected (by default), or "Senders and recipients", but cannot be limited to, for example, only senders. This search will find original email addresses (or, in upgraded cases, both primary and original email). For example, searches for "jsmith@yahoo.com" in "senders/recipients" return documents containing that email address. However, if another document was sent by "jsmith@acme.com", no results are returned, even if the "acme" address was John Smith's primary email address.

Note: To refine your search, use the Participants search area to specify the sender and/or recipients, participant email addresses (including the participant picker to select from a list of existing individuals and email addresses), and/or domains.

- **How domains in participant searches are tokenized.** Tokenization is done by splitting domains on the period delimiter (to provide additional flexibility of not requiring users to enter the entire domain).
- **Wildcard searches in participant search types.** All three search types (participant, email address, and domain) support the use of wildcard searches using ? and *. However, use of wildcards in Participant searches will not initiate a background search and could considerably slow performance. Additionally, you cannot choose term variations, and expansions are limited to 100,000 terms.

Note: Avoid leading wildcard searches, such as *gma* (for gmail), as this can significantly slow the search process.

- **Participant Search filters.** The Sender Name and Recipient Name filters are generated representing the individual with that name, including all messages from all of that individual's email addresses. (There is no set of filters for original email addresses.) Prior to version 6.1, these filters were generated using the primary email address domains for each document in the search results, but the system now applies original email address domain filters. Essentially, when a domain filter is applied, the domain of interest will be present in the appropriate field of each of the filtered documents.

Freeform Searches

The Freeform Search feature allows you to construct queries using the full power of the underlying search engine. This section describes how to construct effective freeform searches.

About the Freeform Search Page

To open the Freeform Search page, select **Freeform** from the search-type list. Note that separate text boxes are provided for message queries and file queries. Separate queries are required for messages and files because the data is stored in separate indexes. The query strings entered in each text box are treated as an AND search, along with any other search criteria you specify on the page.

Basic Freeform Queries

Freeform queries can include terms, fields, and logic operators, as described below. Note the following rules:

- All searches are case-insensitive.
- Each of the two query fields (message and file) can contain up to 8,000 tokens. Tokens are individual query elements, such as terms and fields.
- The maximum text length of a query depends on your browser, but is usually 128K.
- In addition to the Freeform Search page, the product supports basic freeform queries in the Basic search and Advanced search. Any of these words fields, including phrase, logic operators, grouping, wildcard, and proximity searches.
- Advanced freeform queries, such as field selection, fuzzy searches and boosting are not supported in the Basic search, or Advanced search in the *Any of these words* fields.
- Field selection, fuzzy searches and boosting are only supported through the Freeform search screen.

Terms

There are two types of terms: single terms and phrases:

- A single term is one word, such as "coffee" or "tea." A phrase is a group of words enclosed in double quotation marks, such as "grande latte."
- Multiple terms can be combined together with logic operators to form a more complex query (see "Logic Operators").

Logic Operators

Individual query elements can be combined together into more complex search requests by using logic operators. Refer to the table for basic Logical Operators in [“Boolean Searches” on page 82](#).

The following table describes additional logic operators and how they can be used to combined search terms.

Logic Operators

Operator	Description
+	Includes only documents that contain terms after the + symbol (but only the word immediately following the symbol).
	<i>Example</i> <i>Query Syntax</i>
	Search for “mocha” (but may contain “beans”) +mocha beans
-	Excludes documents that contain the term after the - symbol.
	<i>Example</i> <i>Query Syntax</i>
	Search for “bagel” but not bagel -“cream cheese” contain “cream cheese”
	When performing searches, messages and attachments are treated as separate documents. With an AND search, a match occurs for a message only if all of the words are in the message or in an attachment. A match does not occur if the words are split between the message and an attachment.

Wildcard Searches

The product supports the use of ? and * for single- and multiple-character wildcard searches, respectively.

The single-character wildcard indicates that a match occurs on any character in the wildcard position. For example, to search for “text” or “test” enter:

te?t

Multiple-character wildcard searches look for 0 or more characters. For example, to search for “test”, “tests” or “tester”, enter:

test*

You can also use the wildcard searches at the beginning or middle of a term.

te*t

You can perform wildcard searches in any of the following Advanced search fields: Any of these words, All of these words, phrase, None of these words, Source name and location, Subject, or Attachment/file - Any of the words, and in Basic search. You can use wildcards in phrase and proximity searches in Basic search or Advanced search Any of these words fields. Wildcards in phrase or proximity searches are not supported in any other fields.

Specifically, wildcard queries can be done in Freeform search, however, wildcard searches are not supported when used in phrase or proximity queries. For example, the following query will find hits with “flaming”, “flamingo” or “flamingopink” in the body content:

+u_body:flaming*

However, the following query will ignore the wildcard and is essentially a simple search for “flaming lawn ornament” and will not find a document with “flamingo lawn ornament” in the body:

+u_body:“flaming* lawn ornament”

In this example, the letter “o” completely changes the meaning of the phrase.

Note: Searches containing non-ASCII characters and wildcards could return an error due to too many results. If this error occurs, group the non-ASCII characters and wildcards in angle brackets. This prevents the wildcard from running as a separate search.

Grouping

The product supports using parentheses to group clauses to form sub-queries. This can be very useful if you want to control the Boolean logic for a query. To search for either “coffee” or “tea” and “milk” in a document, use the query:

(coffee OR tea) AND milk

Parentheses can also group multiple clauses to a single field. To search for messages that contains both the word “latte” and the phrase “espresso machine” use the query:

(+latte +“espresso machine”)

Proximity Searches

Proximity searches find words that have a specific number of intervening words. When performing proximity searches, the word order in the phrase does not matter. The product supports proximity searches containing two or more terms. You can perform a proximity search two ways:

- Separate search terms with w/n.

Example:

budget w/10 issues

Note: Because w/n is now an operator, searches containing the string, w/n, are interpreted as proximity searches. Verify that the saved searches of upgraded cases are not impacted. Upgraded cases containing saved searches with the string, w/n, may produce an error. Saved searches with the string, NOT w/n, are run as a proximity search.

- Add a tilde (~) at the end of a phrase (quoted string) followed by the total number of other words that are allowed to come between the words in the phrase.

Example:

"budget issues"~10

Both searches will find documents where there are 10 or fewer intervening words between "budget" and "issues" or where there are 10 or fewer intervening words between "issues" and "budget."

Note: Wildcard characters (* or ?) can be used within proximity searches only in Basic search and the Advanced search Any of these words fields.

Nested Proximity Searches

Nested proximity searches combine two query types, proximity and grouping. Examples of nested proximity searches include:

- **"apple pie" w/5 ("strawberry cheesecake" w/10 "lemon tart")**
- **NOT ("apple pie" w/10 "lemon tart")**
- **"maple scone" NOT ("apple pie" w/10 "lemon tart")**

Advanced Freeform Search Features

The following types of freeform searches are supported:

- Fuzzy Searches
- Fields
- Boosting Terms

Fuzzy Searches

The product supports fuzzy searches based on the Levenshtein Distance, or Edit Distance algorithm. To perform a fuzzy search, add a tilde (~) at the end of a one-word term.

For example, to find terms like "foam" and "roams" in the subject of an email, enter the following fuzzy search:

u_subject:roam~

Fields

Fields let you search specific parts of an email, such as the subject, body, or recipient list. Fields are unstemmed, which means that a match occurs only on the exact text specified in the query.

The following table describes the message query fields.

Note: All field names are case sensitive. You must enter all names exactly as shown in the following tables.

Fields Available in Message Queries

Field Name	Description
fromListIndexed	The sender of an email. Normally this is a single participant, but in some cases (such as when a message is sent "on behalf of" someone else) there can be multiple senders in the index.
toListIndexed	The recipients of the email as specified on the To: line.
ccListIndexed	The recipients of the email as specified on the cc: line.
bccListIndexed	The recipients of the email as specified on the bcc: line.
containedSenderListIndexed	List of senders identified in forwarded emails contained within an original email.
containedRecipientsListIndexed	List of recipients identified in forwarded emails contained within an original email.
ID:<document_ID	The document ID number of a specific document. For example: ID:0.7.87.2171
importance	The importance of the email. Valid values are: • 0. Low importance • 1. Normal importance • 2. High importance For example, to search only messages with normal or high importance, add the following to the query: importance: (1 OR 2)
scope	The scope of the email. Valid values are: • 0. Internal (sent between internal participants) • 1. Inbound (sent from an external participant to an internal participant) • 2. Outbound (sent from an internal participant to one or more external participants) For example, to search only internal or inbound messages, add the following to the query: scope: (0 OR 1)
sendersDept	The group(s) of the senders
recipientsDepts	The group(s) of the recipients
topicNounPhrase	The most important phrases in the email, as determined by topic classification. Note: This functionality only applies to topics in pre-7.0 cases that upgrade.
u_subject	Unstemmed subject.
u_body	Unstemmed message text.

Field Name	Description
u_quotedTextN	Unstemmed quoted text regions.
nonEmailAttachmentNames	Attachment names found within an email.

The following table describes the file query fields.

Fields Available in Message Queries

Field Name	Description
u_NEAContent	Unstemmed file content. Use this field to find an exact match on the specified file text.
NEAName	The filename.
u_NEAMetadata	Location where file metadata (such as camera type for a photo) is indexed (in newer versions).

Boosting Terms

You can boost certain terms in your search relative to other terms. To boost a term, add a caret after the term, followed by a boost factor (a number). The higher the boost factor, the more relevant the term will be considered when ranking results.

For example, to search for both "breakfast" and "donuts," but "breakfast" is much more relevant than "donuts," you can enter:

breakfast^4 donuts

By default, the boost factor of all terms and phrases is 1. Although the boost factor must be positive, you can use a value less than 1 (such as 0.2) to decrease a term's relevance.

Common Freeform Searches

The following examples show how Freeform Search can be used to satisfy common eDiscovery requests.

Finding traffic between two groups

While the Dashboard can be used to monitor group-to-group communication, in some cases you may want to carry out more detailed searches using the full power of Advanced search.

To include a constraint in a Freeform query that restricts the result set to messages that were sent between two groups, use the following query:

(sendersDept:"<Group 1>" AND recipientsDepts:"<Group 2>") OR (sendersDept:"<Group 2>" AND recipientsDepts:"<Group 1>")

This logic can be made more complex as necessary; such as to track interactions between more than two groups, or to find documents sent from one of several groups to another group.

Searching for files of a particular type

Freeform search allows you to distinguish between searches on file content and the file name, so that you can limit your searches to files of a particular type. For example, to find loose XLS files and messages that have XLS attachments that contain the word “budget”, use the following file query:

+NEAName:(xls) +NEAContent:(budget)

Finding the blind copy messages that a user received

In a standard advanced search, the “Recipient” field does not distinguish between the To, Cc, or Bcc lines. Using Freeform Search, however, you can easily distinguish between these three fields. For example, to find all messages that were grouped using bcc to someone named Smith, add the following to your message query:

+bccListIndexed:(smith)

Journal Envelope Message Searches

It may be helpful to think of the Journal message as a child message containing the regular “To”, “Cc” and “Bcc” fields and Journal Envelope as a parent message which has these fields merged with its own equivalent fields. This additional information allows users to view, search, and export expanded distribution lists for greater accuracy in filtering on, and producing what was actually indexed in the system.

MSG and EML formats

The platform supports both MSG and EML formats. The difference in the formats is related to the two ways in which the Exchange server is set up for journaling. The first way is journaling to an Exchange mailbox, and the second way involves journaling to an SMTP server. Exchange mailbox means the format is MSG and SMTP means the format is EML.

Basic and Extended Journal Messages

The eDiscovery Platform treats Journal messages depending on its type of archived format.

- Extended Format (*Exchange 2007 and later*)—If the Journal message that was archived was in extended format, the product retrieves the following fields from EV: Journal “To”, Journal “Cc”, Journal “Bcc” and “Recipients”. In this case, the regular fields of the child message are merged with the corresponding parent fields.
- Basic Format (*Exchange 2003*)—If the Journal that was archived was in basic format, the product retrieves only the “Recipients” list (without further classification of the other three fields). In this case, the recipients list is added to the regular “To” field.

When performing searches in Analysis & Review, the “To”, “Cc”, “Bcc” fields automatically include their Journal counterparts, and the Journal Recipients field. Searching for “Recipients” or “To” will also search for the Recipients list (for Exchange 2003).

To select Advanced Search options for Journal Messages

The following journal message search assumes that your case administrator has setup the case to add envelope information to the original Journal message.

- From Advanced Search, choose from the following available Journal message options:
 - To search by processing flags, open the Flags section, select the **Message Processing Flags** option and choose **Journal Message**. This will search specifically for Journal Envelope messages.

Flags

Any of these file processing flags

☐ File Processing Flags

- ☐ No content found
- ☐ File is empty
- ☐ File is password protected
- ☐ File is corrupt
- ☐ File too large (partially indexed)
- ☐ Email container attachment
- ☐ Attached or contained email processed as file

Any of these message processing flags

☐ Message Processing Flags

- ☐ MIME Encoding Truncated
- ☐ Error Processing Attachment
- ☐ Contains embedded images
- ☐ Encrypted Message
- ☐ Attachment/File Information Flagged
- ☒ Journal Message

- To search by participants, open the Participant section and search by *ALL* participants present in the Journal fields.
- To perform a Keyword search, enter "sender and recipients" to include all participants present in the Journal fields.

Email Header Searches

Email headers contain a wealth of information about a message and how it travelled from sender to recipient. This information is not only useful in typical eDiscovery searches but can be valuable in understanding email routing, verifying email authenticity, detecting email spoofing, and assisting with eDiscovery digital forensic investigations.

On the **Advanced Search** page, you can enter some or all of your search terms to find basic or custom email header fields, email header IP addresses and even combine email header searches with other advanced search options. An example of the latter might be an advanced search request that combines the keyword "debt" with the email header fields of "Received" and an IP address).

From the search results page, you can click on the locator hit icon to display the email header results. You can choose to display only the email header search hits (which you can think of as "locator" or web address hits) or all of the email header locator search results. The email header field matches are highlighted for identification. The hit highlighting behaves the same as message search hit highlighting.

Email Header Search Considerations

- Email header search does not allow for Lucene syntax to be entered; users should avoid quotes and special characters.
- There is no phrase or proximity searching.
- Email Header Hit highlighting for email header search results follow the same rules as message search results with the following restriction:

Date/Time Searches: Only date/time email header search results that follow the same format as the original email header are hit highlighted.

Example: If you have a Received field email header with the following date and time format: "15 Jul 2010 21:34:25 -0500", the product returns hit highlights for any of the following searches:

- 15 Jul 2010
- 2010-07-15

If you search for "07/15/2010", all results that match the date are returned but they are not highlighted.

To search email headers

The following email header search assumes that your case administrator has enabled email header search and has selected case appropriate default or custom RFC 2822 compliant email header fields for display, search and export.

1. From **Advanced Search**, open **Email Headers** and select the email header fields within the appropriate boolean operator constraints of Any, All or NONE to construct your search query.

You can search a value in *all* indexed fields by selecting “All Indexed Fields” under the **Any** grouping.

2. Click **Search** to view your email header results.

- The eDiscovery Platform displays relevant email locator hits that match your email header field advanced search criteria.
- A new locator hit icon identifies email header results of interest.

3. Click the locator hit icon to view Internet header information

The screenshot shows a window titled "View Internet Headers" with a close button (X) in the top right corner. Below the title bar, there is a "View" dropdown menu and a "Subject: Message having nested messages as attachments" label. The main content area is divided into two sections. On the left, there is a table with two columns: "Location" and "Custodian". The table has one row with the following data:

Location ↑	Custodian
\\localhost\d\$\data-ui_load_testing	Data-UI_Load_Testing

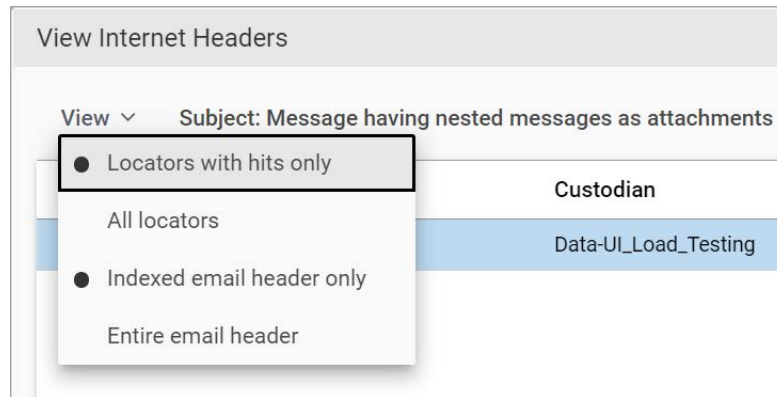
On the right side of the window, there is a detailed view of the email header information. It includes the following fields and values:

- Location:** \\localhost\d\$\data-ui_load_testing
- Sub-Location:** message having nested messages as attachments
- Folder/File:** message having nested messages as attachments.msg
- Custodian:** Data-UI_Load_Testing
- Received:** FROM AUTO-CWDA-EXCH.silverroot.com 2620:128:f0a2:9015:5028:de35:7bbb:da53 BY AUTO-CWDA-EXCH.silverroot.com 2620:128:f0a2:9015:5028:de35:7bbb:da53 ; 2021-09-17T17:20:00.000+0530
- Received:** FROM AUTO-CWDA-EXCH.silverroot.com 10.219.3.241 BY Auto-CWDA-EXCH.silverroot.com 10.219.3.241 ; 2021-09-17T17:19:00.000+0530
- Received:** FROM AUTO-CWDA-EXCH.silverroot.com fe80::5028:de35:7bbb:da53 BY Auto-CWDA-EXCH.silverroot.com fe80::5028:de35:7bbb:da53%12 ; 2021-09-17T17:19:00.000+0530
- Message-ID:** 09491e9f91f0438abc2d04467b4aa8b2@Auto-CWDA-EXCH.silverroot.com
- X-Originating-IP:** [2620:128:f0a2:9015:f5e2:c5a3:e406:da52]

At the bottom of the window, there is a "Show: 10" dropdown menu, a "1 - 1 of 1" indicator, and navigation arrows. In the bottom right corner, there are two buttons: "Copy to Clipboard" and "Close".

- **View Internet Headers** menu displays in the default view mode (locators with hits only and indexed email header only)
- On the left-hand side is the location or web/internet address
- On the right-hand side is the email header contents
- Matching email header terms are highlighted. For further details on email header highlighting behavior, see ["Email Header Search Considerations" on page 107](#).

4. Select the **View** toggle option (Optional) that best suits your needs.



- **Locators with hits only** - (Default) Since the product de-duplicates emails, an email could be found in multiple locations or present in multiple recipients/custodians. Each of these locations/recipients/custodians are called locators. An Email Header Search may hit content in some locators and may come up empty for other locators. This option displays only the locators where the search found results.
 - **All Locators** - This option displays all locators (all locations where the email was found) regardless of whether those locators contain the search term or not.
 - **Indexed email header only** - (Default) This option displays only the email headers that have been indexed in the case properties.
 - **Entire email header** - All the searchable and non-searchable email header content. This option displays all available email headers.
5. Click **Copy to Clipboard** or **Close**.

To search for all IP addresses with the Received email header field

1. From **Advanced Search**, open **Email Headers** and select **Received** under **All** and enter an IP address. For example: "198.51.100*".
2. Click **Search** to view matching IP headers results.
3. The View Internet Header menu displays with the IP address hit highlighted.

Reason Code Tag Searches

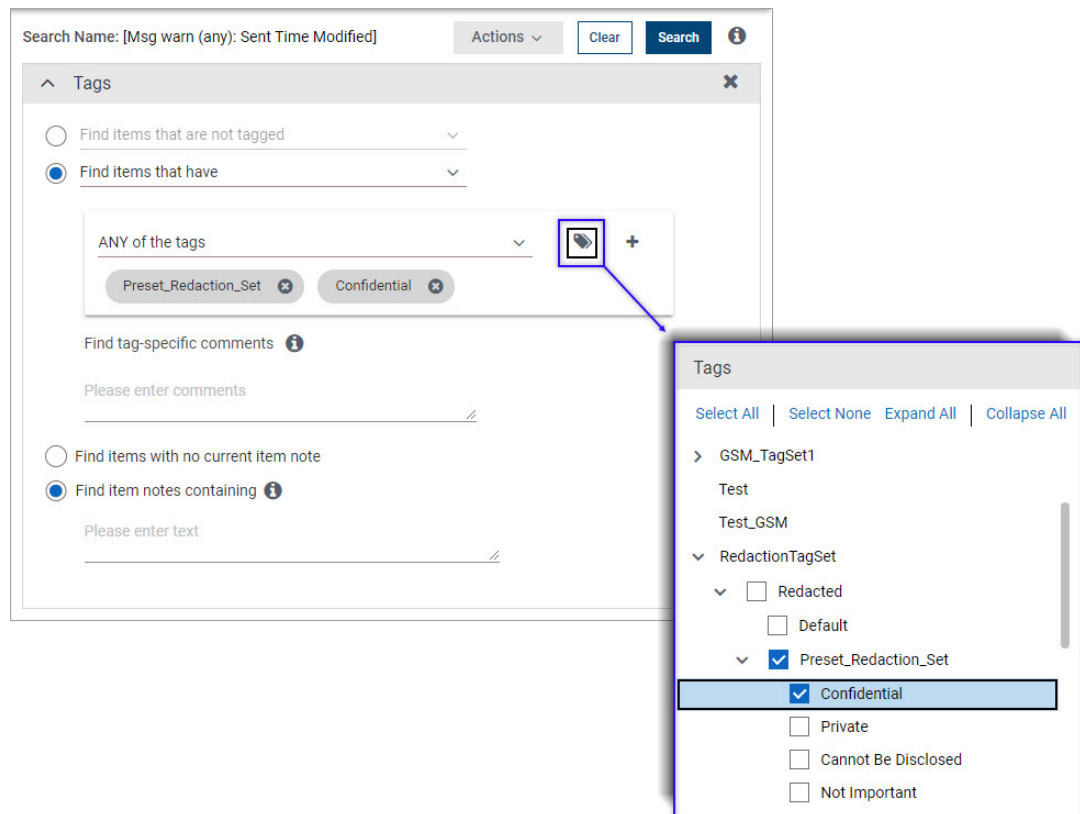
If your eDiscovery administrator has set up and provided preset reason codes, you can filter and use advanced search to quickly find items that meet a specific preset reason code tag.

Note: Tag information is also present in the export XML file.

To search for reason code tags

1. From **Advanced Search**, open **Tags** and select a preset reason code under **RedactionTagSet > Redacted > Preset Redaction Set**.

In this example, the administrator has set up four preset reason codes: **Confidential**, **Private**, **Cannot Be Disclosed**, and **Not Important** and we want to search for documents tagged with **"Confidential"**.



2. Click **Search** to view the results.
3. The search list displays all matching preset reason code tags. In this example, all preset reason code tags of **Confidential** will display.

Non-English Language Searches

The product supports searches in all common languages. When performing searches with languages that use characters, such as Chinese, Japanese and Korean, note the following:

- If you enter characters with no spaces, such as:

北京中国

(Beijing China)

The product interprets this as a phrase search and will find documents containing these characters in the exact order you specify.

- To search for documents containing ANY of these characters, enter the characters with spaces or using explicit OR operators. For example:

北京 中国, or 北京 OR 中国

will search for Beijing OR China.

- To search for documents containing ALL of these characters but in no particular order, enter the characters using explicit AND operators. For example:

北京 AND 中国

will search for Beijing AND China.

- If you do a wildcard search (using ? or *) with Kanji style multi-character sets, you may have mixed, or no results. These conditions are more complex. For example:

重大收支机会

this is broken into three tokens:

重大

收支

机会

To search for any of the tokens in wildcard form, supply only that token with a wildcard.

Further, for accurate interpretation of wildcards in Chinese, Japanese and Korean languages, the system requires enclosing the phrase with angle brackets: < and >. This enables proper language boundary detection and identification. In the above example, the last of the three tokens and its wildcard variations can be searched using:

<收*>

Note: Currently, no translation functionality is provided. For more information and examples on multi-character handling, and how to search in languages other than English, refer to the section [*"Multiple Language Handling" in the Case Administration Guide.*](#)

Punctuation Searches

The product indexes some punctuation characters but does not index others. In order to maximize searchability, the system also indexes punctuation characters differently depending on where they are found. For example, To, From, Cc, Bcc and filename content is indexed differently from other content. The system also alternatively indexes different types of terms, such as email addresses or terms containing numbers. See the Appendices for details on how punctuation characters are indexed.

Frequently Asked Questions About Punctuation Searches

How does the system handle punctuation searches?

The ability to find documents containing terms that include punctuation characters depends on whether the characters are indexed. If a character is not indexed, then it will, typically, be replaced by a space during indexing. Such a character will also not be searchable and will be replaced by a space when included in a search.

Example

If Not Indexed	Then Processes	Then Indexes
If # is not Indexed:	document containing the term #revenue	revenue (not #revenue)

In this example, this search will find all documents that originally contained #revenue and find all the documents containing revenue on its own or associated with other non-indexed characters, such as (revenue).

Why does the product remove punctuation?

The product removes punctuation characters in this way in order to improve search results. Without this, keyword searches may not find documents in which a word (instead of punctuation) occurred at the end of a sentence, or was enclosed in parentheses. However, it is possible to adjust how the system indexes punctuation characters. See [“Treatment of Punctuations for Cases Started with or after Version 4.5” on page 118](#) for more information.

If a search contains a term with a punctuation character that has been indexed, only documents containing the term that includes the punctuation character will be found.

Example

Search	Then Finds
Documents containing 10% (and % is indexed)	document containing the term 10% (not containing 10)

Can the product index more than one version of a term?

In order to maximize searchability, the system will sometimes index two versions of a term: one with punctuation characters indexed and one or more terms in which punctuation characters are removed. This makes it possible to construct searches to find documents containing these characters, if desired.

Example

If document contains term:	Then:	
risk/reward (and / is a searchable and non-searchable character - both indexed and not indexed)	A. Search: risk then search for: reward	B. Search: <risk/reward> (finds only documents that precisely contain this term)

Note: The use of the “less than” and “greater than” signs <> alerts the system not to remove any punctuation characters when searching the index. It is possible to modify which characters will have this behavior. The system indexes email addresses and numbers in a similar manner. The original address or number containing the term will be indexed and the terms after removal of punctuation characters will also be indexed. (See [“Treatment of Punctuations for Cases Started with or after Version 4.5” on page 118](#) for more information.)

How does the search engine use punctuation as query syntax?

The search engine uses certain punctuation characters as part of the syntax for constructing search queries. For example, parentheses are used to group terms, and quotes are used for phrase and proximity searches. As a result, searching for these punctuation characters requires instructing the system to not use these characters as part of the query syntax but instead to search for these characters. There are two ways to search for these characters:

- Use the back slash (\) escape character: For example, to search for +10 use \+10
- Use quotes: For example, to search for +10, use “+10”.

Note: Use this only if the phrase to be searched for does not contain quotes itself.

The following characters need to be escaped or quoted: + - & \ | () { } [] ^ ~ : ". Wildcard characters * and ? are not currently searchable.

Search Examples

Leading wildcard searches

Example

Search	Query Syntax
Search for words containing "inflate"	*inflate*

Proximity searches

Example

Search	Query Syntax
Search for inflation and profit with 10 or fewer intervening terms in either direction	inflation w/10 profit "inflation profit"~10

Proximity searches containing wildcards

Example

Search	Query Syntax
Search for inflat* profit* with 10 intervening terms	inflat* w/10 profit* "inflat* profit*"~10

Proximity searches containing exact phrases

Example

Search	Query Syntax
Search for the exact phrase "stock option" with 2 intervening words between "stock option" and backdate	"stock option" w/2 backdate

Nested proximity searches

Example

Search	Query Syntax
Search for "inflates" within 5 terms of "profit" within 10 terms of "options" within 5 terms of "backdating"	(inflate w/5 profit) w/10 (options w/5 backdating)

Proximity and NOT searches

Examples (Nested Proximity Searches)

Search	Query Syntax
Search for "stock" except when there are 20 intervening words between stock and "option"	stock NOT w/20 option
Search for all documents not containing "stock" and "option" within 20 terms	NOT (stock w/20 option)

Frequently Asked Questions

Does the system perform in-text character searches?

By default, the product performs term based searching and does not perform an in-text character search. For example, searching for "ch" will not find the word "searches". If it is required to find in-text characters, a leading/trailing wildcard search, such as *ch*, can be performed. You can also use Search Preview in order to analyze the results of these wildcard searches to evaluate which terms are relevant and which terms are not.

How do I know when to use a stemmed vs. literal search?

The system provides the ability to search with both stemmed variations as well as literal, without requiring re-processing of data. The Basic Search field always performs stemmed searches. In the Advanced Search screen, you can choose whether to run a stemmed search or a literal search by using the Search All Variations of the Keyword Terms (Stemmed Search) checkbox.

Stemmed searches find variations of words such as plurals or alternative verb forms based on a set of linguistic rules. Wildcard searches will find all words that match the characters defined in the wildcard search, so a search for hir*, which is intended to find documents related to hiring, will find all documents containing words whose first three letters are hir. By finding variations of the specified keyword, both stemmed and wildcards searches can find more relevant documents containing these variations that otherwise might have been missed. However, each of these technologies have trade-offs. In addition to finding more relevant documents, they can find non-relevant documents or false positives. For example, the search hir* might find documents containing the word "hirl", which could be someone's last name, which likely is not relevant to hiring.

In general, the use of stemming versus wildcards depends on a cost-benefit analysis that weighs the value of finding more relevant documents versus the cost of finding more false positives. Wildcard searches will tend to find more relevant documents but also more false positive documents. Stemmed searches have been designed to find fewer false positives, but they may not find some relevant documents that a wildcard search might find. For example, stemmed searches will typically not find misspelled words that wildcard searches might find. Using Transparent search, you can dramatically reduce the number of false positive documents by excluding irrelevant variations in wildcard or stemmed searches. Users should choose the search method that best matches their search objectives.

How do I search for all emails to or from another person and perform privilege searches containing names?

Searches for email to or from people can be conducted using the sender and recipient fields within advanced search. As part of this approach, the participant picker (which can be accessed by clicking on the icon to the right of these fields) can be used to identify the participants whose emails you wish to find by using searches like **[lastname]** or **[firstname]**. A participant is a unique email address and/or display name.

With a search for potentially privileged documents, it is typically necessary to find emails or files that reference the designated people, such as attorney names, anywhere within a document not just the sender and recipient fields. In these situations, it is recommended to use the Search Preview to identify all the terms that contain part or all of the person's name anywhere within the document in addition to running a search using the participant picker.

Search Reference

Treatment of Punctuations for Cases Started *with or after* Version 4.5

- The treatment of punctuation characters has changed in version 4.5 as part of the addition of multiple language support. For cases started in version 4.0, punctuation characters will be handled as they were in version 4.0. See [“Treatment of Punctuations for Cases Started Prior to Version 4.5” on page 122](#) for information on this behavior.
- This section covers how punctuation characters are treated for characters in the Latin script. For information on the treatment of characters written in other scripts including Chinese, Japanese and Korean, please refer to the Veritas Multiple Language Guide. All of the following rules apply to the Keywords, Email - Subject, and File/Attachment - Any Of The Words fields within Advanced search.
- Punctuation characters are treated differently for characters written in Latin scripts and characters written in other scripts. The product will always split words when they contain characters in more than one script when the script change occurs.
- For most terms, the system will treat punctuation characters in four different ways.
 - Searchable characters are indexed as-is during processing and can be searched within the product.
 - Non-searchable characters (also referred to as Delimiters) are treated as spaces during processing and will normally be removed from search queries.
 - Trim characters are removed if they are the first or last character of a term.
 - Searchable and non-searchable characters are both indexed and treated as spaces during indexing. These characters will normally be removed from search queries but can be searched for by surrounding a search term with less than and greater than signs <>.
- During indexing, for most terms, the system will find an original term, remove trim characters and treat non-searchable characters as spaces and index the resulting token or tokens.
 - For example, the terms *The quick, brown fox* will be indexed as: *the quick brown fox*

- The comma and period are removed because these comma and period are non-searchable characters.
- Terms containing searchable and non-searchable characters however will be indexed multiple times.
 - For example, the term *well-received* will be indexed with the following tokens: *well* *received* *well-received*.
- The system treats certain terms including email addresses and terms containing numbers, differently from an indexing and search perspective in order to maximize the searchable information contained within these terms.
 - Email addresses will be indexed in multiple ways.
For example: The email address **jdoo@sales.company.com** will be indexed into the following tokens: **jdoo@sales.company.com** **jdoo company.com** **sales.company.com**
- Terms containing numbers will also be indexed multiple times. When indexing terms containing numbers, the product will first trim the original term using the characters designated as Trim characters and index the resulting token. The system will then re-index the original term using the searchable, non-searchable, trim and searchable/non-searchable rules described above. Here are some examples using the default character designations described below.
 - The term *123.45.6789* will be indexed into the following tokens: *123.45.6789* *123 45 6789*
 - The term *123.45.6789*, will also be indexed into the same tokens as the comma will be trimmed: *123.45.6789* *123 45 6789*
- As described in the punctuation search section, angle brackets should be used to search for email addresses or numbers that otherwise would not be searchable.
 - For example, to search for Social Security numbers that use hyphens, use the following searches: *<???-??-????>* without enclosing this in the angle brackets, this search is interpreted as *??? OR ?? OR ????*.

Social Security Numbers Search String

Here is a search string that will look for any information that consists of a standard U.S. Social Security number structured in the format of XXX XX XXXX with period, pipe, hyphen or slash separators. It is possible to modify this to search string to look for other number searches like phone number or a credit card number.

You can enter the following lines:

```
<0???.???.????> OR <0??|??|????> OR <0??-??-????> OR <0??/?/?/????>
<1???.???.????> OR <1??|??|????> OR <1??-??-????> OR <1??/?/?/????>
<2???.???.????> OR <2??|??|????> OR <2??-??-????> OR <2??/?/?/????>
<3???.???.????> OR <3??|??|????> OR <3??-??-????> OR <3??/?/?/????>
<4???.???.????> OR <4??|??|????> OR <4??-??-????> OR <4??/?/?/????>
<5???.???.????> OR <5??|??|????> OR <5??-??-????> OR <5??/?/?/????>
<6???.???.????> OR <6??|??|????> OR <6??-??-????> OR <6??/?/?/????>
<7???.???.????> OR <7??|??|????> OR <7??-??-????> OR <7??/?/?/????>
<8???.???.????> OR <8??|??|????> OR <8??-??-????> OR <8??/?/?/????>
<9???.???.????> OR <9??|??|????> OR <9??-??-????> OR <9??/?/?/????>
```

- The following characters cause content to be indexed two ways. Words on either side of the character are indexed both separately and as a compound.
 - Hyphens (-, ?) and En dash (-)
 - Forward and back slashes (/ \)

Non-Searchable characters

The following characters are non-searchable:

- Colon (:) and semi-colon (;)
- Figure Dash (?), Em dash (-), horizontal bar (?) and Non-breaking hyphen (?)
- Exclamation marks (!) and question marks (?)
- Parentheses and brackets (() [] { } ?? ?? ?? ?? ?? ??)
- Single Quotes, Double Quotes or guillemets or angle brackets (' ' " " " " " " , " < > " ")
- Less than or greater than signs (< >)
- Inverted exclamation marks (¡) and inverted question marks (¿)
- Generic currency marks (¤)
- Interpuncts (·) and bullets (• ·????)
- Ellipses (...)
- Daggers († , ‡)
- Asterisk (*)
- Vertical pipes (| | ?)
- Equals sign (=)
- Pilcrow (¶)

- Number sign (#)
- Underscore (_)
- At signs (@ ? ?)
- Greek semi-colon and tonos (? ? ? ?)

Trim Characters

The following characters are Trim characters

- Apostrophe (')
- Ampersand (&)
- Period (.) and Comma (,)
- Colon (:) and semi-colon (;)
- Figure Dash (?), Em dash (-), horizontal bar (?) and Non-breaking hyphen (?)
- Exclamation marks (!) and question marks (?)
- Parentheses and brackets (() [] { } ?? ?? ?? ?? ?? ??)
- Single Quotes, Double Quotes or guillemets or angle brackets (' ' " " " " " " , " < > " ")
- Less than or greater than signs (< >)
- Hyphens (- , ?) and En dash (-)
- Forward and back slashes (/ \)
- Inverted exclamation marks (¡) and inverted question marks (¿)
- Interpuncts (·) and bullets (o ·????)
- Ellipses (...)
- Asterisk (*)
- Vertical pipes (| | ?)
- Equals sign (=)
- Pilcrow ()
- Underscore (_)
- Greek semi-colon and tonos (? ? ? ?)
- Fullwidth & small versions of commas, exclamation points, period, colon, semi-colons, quotes, reverse solidus' (??????????????)
- All other punctuation characters are searchable. Some examples of these include the following:
 - Percent (% ‰)
 - Currency (\$ ¢ £ ? € etc.)

- Section mark (§)
- Tilde (~)
- Mathematical symbols such as the plus sign (+), division slash (/), and minus sign (-)
- It is possible to change how characters are treated within the system. Please contact Technical Support for more information. If you have a significant number of documents containing foreign language documents, you may want to consider changing some of the character treatment. For example, you may want to consider changing the treatment of apostrophes for cases containing significant amounts of French or Spanish documents.

Treatment of Punctuations for Cases Started Prior to Version 4.5

- For cases started prior to version 4.5, when searching any fields via the Keywords, Email - Subject, and File/Attachment - Any Of The Words fields, the system will treat punctuation characters as spaces except in the following cases:

Examples

Cases	Indexed Punctuation Characters
Word without numbers in email and file content	Period when not followed by whitespace (.) At symbol (@) Apostrophe (') Ampersand (&)
Words containing numbers in email and file content	Period (.) Hyphen (-) Forward slash (/) Underscore (_) Comma (,)

- When searching the To, From, cc, bcc fields of email via the Any of These Senders or the Any of These Recipients fields, most punctuation and special characters are indexed and not ignored.
- When searching for filenames via the Any of These File Names or Extensions, the following characters will not be indexed and will be treated as spaces. All other punctuation characters will be indexed.
 - Period (.)
 - Forward and back slashes (/ \)
 - Hyphens (-)
 - Underscores (_)
 - Commas (,)
 - Semi-colons (;)
 - Quotes (")
 - Asterisks (*)

- Question marks (?)
- Pipes (|)
- Brackets (< >)

Stop Words for Cases Started Prior to Version 4.5

- In cases started prior to version 4.5, the product did not index stop words. As of 4.5 and beyond, all words are indexed.
- Stop words are ignored in all searches except for phrase searches. For example, the search “the energy policy” will search for documents containing “the”, “energy”, and “policy” in that order. Stop words are not supported within proximity queries. For example, you cannot search for “the energy policy”~10. The word “the” will be ignored in the search and should be removed. Note also that stop words in the documents that are being searched are counted as intervening words in proximity searches.
- The following default stop words apply to versions prior to 4.5:

Stop Words

Terms					
a	came	him	much	still	way
about	can	himself	must	such	we
after	come	how	my	take	well
all	could	however	never	than	were
also	did	i	not	that	what
an	do	if	now	the	when
and	each	in	of	their	where
another	even	indeed	on	them	which
any	for	into	only	then	while
are	from	is	or	there	who
as	further	it	other	therefore	will
at	furthermore	its	our	they	with
be	get	just	out	this	would
because	got	like	over	those	you
been	had	made	said	through	your
before	has	many	same	thus	
being	have	me	see	to	
between	he	might	she	too	
both	her	more	should	under	
but	here	moreover	since	up	
by	hi	most	some	was	

Analyze

This chapter describes the eDiscovery Platform software and the basic user analytics and related tasks that you can perform.

Refer to the following topics:

- [“Using the Discussions Screen” in the next section](#)
- [“Using the Participants Screen” on page 129](#)
- [“Using the Participants Screen” on page 129](#)

Using the Discussions Screen

Each message retrieved by a search may be part of a discussion—a sequence of send-reply or forward messages that have the same subject. The Discussions screen lists all the discussions that have one or more messages in the retrieved results, sorted in descending order by relevance score. The originator, start date, and number of messages are shown for each discussion. You can tag a discussion thread from this screen by clicking **Tag** from the **Bulk actions menu**  drop-down list.

Note: The discussion may include messages that do not otherwise match search criteria.

To view the Discussions screen

1. In the Analysis & Review module, on search results screen, click **Discussions** tab.

Searched : 2,884,441

Found : 2,884,441 Documents (4,051,005 Items)

548,993 Discussions

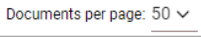
192,608 Participants

Report

Discussion List

2. Refer to the following table to perform tasks on this screen.

Discussion Screen - Icons and Functions

Icons or Function	Description
	Determines how many records are displayed on a page. Use the Documents per page drop-down list to change the number of documents that are displayed on each page.
	Pages through the retrieved documents. Enter a page number and press Enter to go to that page or use the arrows to go to the next or previous page.
Column Headers	Changes the sort order. You can sort on messages or relevance score.
Filters	See “Filtering Search Results” on page 61 .
Action menu	From the Bulk actions menu  drop-down list, select Tag . See “Bulk Tagging Reviewable Items” on page 135 . Other options include Folder and Export .
Underlined title links	Click to open the Discussion Analysis screens, as described in “Discussion Analysis” in the next section .

Discussion Analysis

For each discussion, you can view the message sequence (thread), the key terms, the conversations or messages sent by each contributor and between each pair of contributors, and all the associated attachments. You can also save or print a discussion thread summary and all (or selected) messages in a thread.

The Discussion Analysis screens provide access to all of these details. The discussion name is the subject of all the messages in the discussion.

To use the Discussion screens

1. Click **Discussions** when viewing search results, and then click an underlined link from the Title column. The **Discussion Analysis** screen opens on **Thread** tab.

The screenshot displays the 'Discussion Analysis' interface for a specific email thread. The title bar indicates 'Discussion List [1-10] / Discussion 1'. The main heading is 'Discussion Analysis: New Exchange Traded Gold Fund Is All The Rage - Forecasts & Trends Weekly E-Letter'. Navigation tabs include 'Summary', 'Thread' (selected), 'Terms', 'Conversations', and 'Senders'. A note states: 'Note: Derived messages may be shown below for discussion thread clarity, but cannot be tagged or exported.' Below this, a table lists the thread participants:

	Sender	Receipients	Originated	Messages
☐	garyhalbert@invest...	Timothy Martin	11/30/2004	2934
☐	branchnec			
☐	Low, Richard			
☐	phxspcc			
☐	Rogers, Shawn			
☐	Harger, Barbara			
☐	BranchBG, Edina(ND)			
☐	PhxSPCC			
☐	McDonough, Marc			

On the right, the 'Shorten View' pane shows message details:

- Doc ID: 0.7.24.492507 (Primary Message)
- Custodian: SM_AG_00029
- Language(s): English (100%)
- From: garyhalbert@investorsinsight.com <garyhalbert@investorsinsight.com>;
- To: timothy.martin@schwab.com <timothy.martin@schwab.com>;
- Sent: Tue Nov 30 2004 15:41:26 MST
- Subject: New Exchange Traded Gold Fund Is All The Rage - Forecasts & Trends Weekly E-Letter

Below the headers, it states: 'This message was sent to timothy.martin@schwab.com.' and provides links: 'Send to a Friend | Print View | Contact Gary D. Halbert Here'. The email body text reads: 'New Exchange Traded Gold Fund Is All The Rage by Gary D. Halbert November 30, 2004'. A section titled 'IN THIS ISSUE:' lists five topics:

1. The New Exchange Traded Gold Fund
2. ETF Is A Better Way To Invest In Gold
3. Gold ETF Advantages & Disadvantages
4. Should You Buy Gold Now At \$450/Ounce?
5. Don't Get Carried Away By Gold At This Time

- Click one of the tabs in the Discussion Analysis screen to view the discussion details, as described in the following table.

Discussion Analysis Tabs

Tab	Description
Summary	Provides a summary of the discussion, including the originator, senders, recipients, number of messages, discussion duration, number of attachments, and five terms that occur most frequently during the discussion.
Thread	Provides a tree-like structure that shows the sequence of messages in the discussion. Perform these functions on this tab: - Click the sender name to view the contents of the message. The search keywords are highlighted in yellow. Click Header to show or hide the header information. The message  reply and  forward icons help identify message flow. - Click over a sender or recipients name or their person  icon to display relevant details. - Click the X in the upper-right corner of a message window to close the window. - Click Next or Prev on the message window to move to the next or previous message in the thread. - Click Next or Prev above "Analyzed across case" to go to the next or previous thread in your search results. Note: The derived message shown next to the message header indicates the message was not found individually, but was identified from the text included in another message. Derived messages are shown for discussion thread clarity but cannot be selected for export or tagging. For example, if a message is sent from internal user A to external user B, and is then forwarded to external user C, who replies to A and B. The message from B to C is not received internally, but is derived from the forwarded text in the message from C.
Terms	Lists the most commonly occurring words or noun phrases that occur in the discussion, sorted by relevance score. The number of occurrences is shown for each term. Click a term to view snippets of the messages where the term occurs.
Conversations	Lists the pairs of individuals who have sent messages to each other during the discussion, sorted by relevance score. Click a pair to view the messages between the two contributors. You can also select from many options such as tag or folder from the Bulk actions menu  drop-down list.
Senders	Lists all the individuals who have sent messages during the discussion, sorted by relevance score. Click a name to view all messages sent by the contributor. You can also select from many options such as tag or folder from the Bulk actions menu  drop-down list.

Using the Participants Screen

The Participants screen lists all of the individuals with unique email addresses who are senders and/or receivers of email messages found in the search. For each participant, the screen lists the number of messages sent from that participant, the number of messages received by that participant, the total number of messages, and the score for each participant. The score for each participant is the highest score of each message associated with that participant.

To view the Participants screen

- From the **Analysis & Review** module, on search results screen, click **Participants**.

Searched : 50,940	Found : 50,940 Documents (98,178 Items)	8,716 Discussions	107,081 Participants	Report
» Participant List				
Participants: 107,081				
Participant	Sent	Received	Total	↓
Bryan Duncan	1,000	10,978	11,978	
Bryan Duncan	0	9,716	9,716	
Michael Parker	0	9,153	9,153	
Sam Spear	365	8,305	8,670	
Michael Hassell	0	8,642	8,642	
B Davenport	0	8,591	8,591	
Eddie Anderson	0	8,305	8,305	
Michael Bailey	0	8,152	8,152	
Doug Hayes	0	7,971	7,971	
Carrie Dunton	0	7,952	7,952	
107081 Participants found				
Participants per page: 10 1 - 10 of 107,081 Page: 1				

- For instructions on how to use this screen, refer to the following table.

Participants Screen - Icons and Functions

Icons or Function	Description
Documents per page: 50	Determines how many records are displayed on a page. Use the Documents per page drop-down list to change the number of documents that are displayed on each page.
Page: 1	Pages through the retrieved documents. Enter a page number and press Enter to go to that page or use the arrows to go to the next or previous page.
Column Headers	Changes the sort order. You can sort on all of the header columns.
Filters	See <i>"Filtering Search Results" on page 61</i> .
Underlined participant links	See <i>"Participant Analysis" in the next section</i> .

Participant Analysis

The Participant Analysis screens present details about the topics in the search results.

To view the Participant Analysis screen

1. Click **Participants** when viewing search results, and then click the participant name. The **Participant Analysis** screen opens on **Interactions** tab.

Participant List [1-10] / Bryan Duncan			
Participant Analysis: Bryan Duncan			
Summary	Interactions	Messages	Discussions
		Attachments	
Participant Interacting With	Sent To	Received From	Total ↓
B. G. Davenport	454	1,169	1623
Sam Spear	587	360	947
Ginny Parker	466	370	836
John M. Boyles	452	172	624
Chuck Williams	44	355	399
Beth Dalke	9	389	398
George W. Shute	0	391	391
1524 Participants found			
Interactions per page: 10 1 - 10 of 1,524 Page: < 1 > X			

2. Click a tab in the Participant Analysis screen to view details.
3. In the upper-right corner, choose **Analyzed within search** to view the information for the current search or **Analyze across case** to view the information across all the documents in the case.

Participant Analysis Tabs

Tab	Description
Summary	Provides summary information about the participant, including group, email address, other participants with whom the individual interacted most frequently, number of interactions, number of messages and discussions in which the participant was involved, and number of attachments in those messages.
Interactions	Lists the other participants with which this participant interacted. Each entry includes the number of messages that the recipient of interest sent to the other recipient, the number of messages that the recipient of interest received from the other recipient, and the total number of messages involving both participants. Click a participant name to open the Participant Analysis screens for that individual and click the link for messages sent or received to display the messages.
Messages	Displays all the messages involving the participant.

Participant Analysis Tabs (Continued)

Tab	Description
Discussions	Lists all discussions involving the recipient, including the title of the discussion and the originator. Click a discussion to view the Discussion Analysis screen for the discussion (see "Using the Discussions Screen" on page 125).
Attachments	Lists the attachments for all the retrieved messages that involved the participant. To open an attachment, click the attachment file name, or click View HTML (available for most file formats). To save the attachment, right click and select Save Target As . In HTML format, search terms are highlighted.

Organize and Track with Bulk Tagging

This chapter describes the basic tagging tasks that you can perform.

Refer to the following topics:

- [“Item and Document Family Modes” in the next section](#)
- [“Terminology” on page 135](#)
- [“Bulk Tagging Reviewable Items” on page 135](#)
 - [“Bulk Tagging Behavior Post-7.1.2” on page 136](#)
 - [“Legacy and Current Tagging Behavior & Search Results Explained” on page 136](#)
 - [“Tagging Considerations” on page 136](#)
 - [“Bulk Tagging” on page 137](#)
- [“Using the Tag Event History Screen” on page 139](#)

Item and Document Family Modes

Do you need flexibility when tagging review items and document families? The eDiscovery Platform lets you simultaneously manage, view and analyze your data at either the item or document family level. If you are used to workflows operating at the document family level, you can continue to work, review, analyze, tag and operate in that mode. Or, if you want to operate on purely an item level the platform allows you to easily do that as well. As you review and tag item level content, the context of that item and how it relates to the family set of document is preserved and remains visually present. The purpose of operating in this dual mode of presentation is to display and lead users and reviewers into a better understanding of their case data. To better illustrate these points, consider the following examples:

Attachment Tagging Example

As a reviewer, you may want to track the relevance of an attachment independent of its parent email message and also make family level decisions based on its relevancy. For example, you may have an email message that is not responsive but several of its attachments are responsive. Since the attachments are responsive, you must produce the email message for in-house and requesting party purposes. You can easily track those tagging decisions and view the attachment hierarchy within the eDiscovery Platform. You can tag the email message “Not Responsive” and its attachment “Responsive”, and later tag email message using another tag, for example “Family Responsive”, to track the family decision.

Early Case Assessment (ECA) Example

In ECA, you need to quickly learn and identify relevant data from the entire corpus and use that information to focus the scope of the case. You can extract quick ECA insights from massive amounts of case data with the combination of the uncluttered visual display of only search

results hits, bulk tagging and power selector options. These tools enable a quick first pass tagging of the content most likely to be responsive. And, of equal importance, you can tag and exclude non-responsive and privileged case data with confidence.

Terminology

It may be useful to define a few key terms:

Document Family — Embodies the concept of a parent-child relationship where there is one parent and one or more children. A document family can be created in several ways. Some examples of this family relationship in the eDiscovery environment are an email (parent) and its attachments (children), a compound document with embeddings, or a container file (ZIP file).

Item — An item is a single piece of content (such as an email message, attachment or embedding). It is usually part of a document family as, for example, an attachment is to a parent email. It is the document family that provides the connections and context between items. The eDiscovery Platform maintains these family relationships but can visually keep non-relevant items from cluttering up the display by graying them out.

Bulk Tagging Reviewable Items

Bulk tagging allows you to manage large sets of reviewable items by assigning them to folders and by flagging them with predefined values in the categories that matter to you, such as relevance, privileged, and status. For example, you can organize related document families into folders for further analysis by a team of reviewers, who can then retrieve the documents assigned to them, tag the reviewable items, and enter notes. In addition to assigning to folders and applying tags, reviewers can add text notes to items.

Your system or case administrator must define all folders and tag category names, and the values that can be selected for each tag category. For example, a “Responsive” or “Privileged” category can be added as a check box, or a “Reason code” category can be defined as a drop-down with a list of reason codes.

Version 8.0 not only simplifies bulk tagging but makes it easier to perform the action on any type of critical content. You can access bulk tagging from a variety of content search results paths. This includes, but is not restricted to, search results from the main Documents/Items page, from Find Similar Results > Messages or Discussions tabs, or From Participants > Messages, Discussions, Threads, Conversations or Senders.

You may be able to perform any of the following tagging operations, depending on how your system administrator has configured tagging:

- Assign document families to a specific folder (folders are configured by your administrator).
- Apply tag values (tag check boxes and drop-down lists are configured by your administrator).
- Add an item note to explain tagging decisions or highlight other helpful case review annotations.

Bulk Tagging Behavior Post-7.1.2

Item versus Document Family Level Tags

In 7.1.2, the eDiscovery Platform treated all documents and attachments as items. For example, it applied item-based behavior to tags and to the search results run on emails with attachments. For those reviewers functioning in a purely item-based world, this core behavior makes searching and tagging actions easy and the results transparent. However, if your tagging set up relies on a family document relationship (where a parent-child relationship or hierarchy exists), the eDiscovery Platform recognizes that it is also desirable to preserve family document tagging behavior where the action of tagging either a parent or attachment in a document family results in the tagging of the entire document family. 7.1.3 tag enhancement work supports and enables the following:

- Family tags can be easily propagated to the attachments
- Legacy family tag sets are maintained in the item-based world
 - Legacy redaction tag sets will have the same tagging behavior as a family tag set.
- Search displays both item and document family tag counts. Case settings made by your case administrator determine which count is the default view.
- Any pre-7.1.3, tag searches that do not conform to the expected item and document family tagging behavior, can be modified. See [“Working with Previous and Saved Searches” on page 44](#).

Note: See [“Using the Tag Event History Screen” on page 139](#) and Tagging Reference card for more information on tagging actions and expected search results.

Legacy and Current Tagging Behavior & Search Results Explained

For details see [“Appendix A: Legacy and Current Tagging Behavior & Search Results” on page 221](#).

Tagging Considerations

- Starting with 7.1.2, tag names are no longer case sensitive
 - Prior to 7.1.2, tag names were case sensitive. Users could create a tag named “review” and a separate tag named “REVIEW”. Upon upgrading to 7.1.2, tags that rely on case sensitivity are no longer unique. These duplicate tags are renamed using the following convention:
`<original tag name>_SysRenamed<count>`
 - Duplicate tags are renamed upon upgrade
 - If the length of the new tag name exceeds the character limit of 255 characters, users must rename the duplicate tag manually
- Performing item and family tagging together results in two tag events.

Bulk Tagging

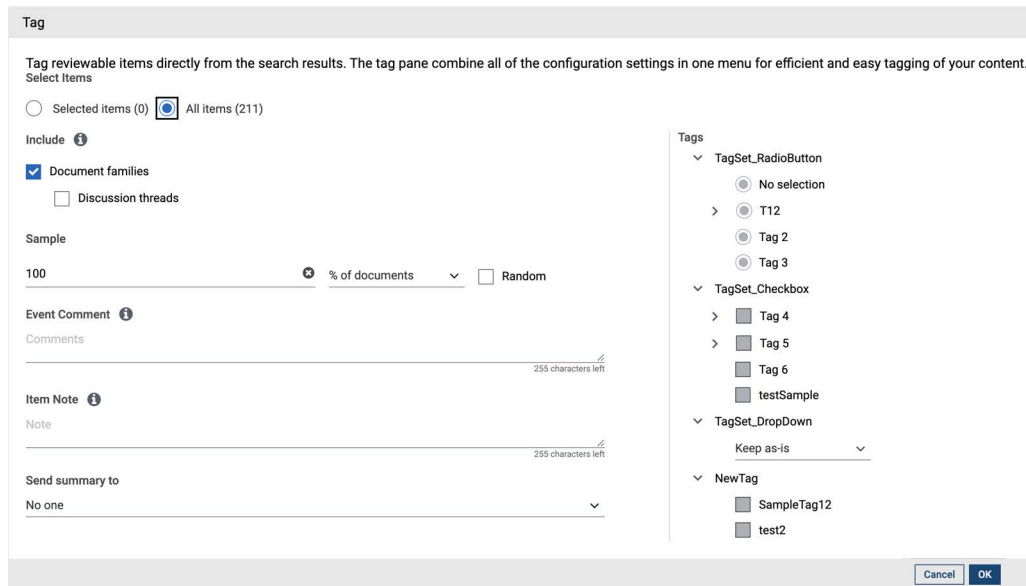
You can tag reviewable items directly from the search results or in the Review mode view. The following procedure describes how to bulk tag items from the search results and describes the tag settings. See [“Using the Document Review Screen” on page 156](#) for instructions on accessing the tag settings in Review mode. The Tag pane combines all of the configuration settings in one menu for efficient and easy tagging of your content.

Note: Starting with version 8.0, tagging is a single menu operation.

To bulk tag items

1. Perform a search query (see [“Performing Searches” on page 23](#)).
2. Use check boxes to select the items that you want to tag.
3. From the **Bulk actions menu**  drop-down list, click **Tag**.

The Tag menu displays.



4. Specify which documents you want to tag.
 - **Selected Items.** This tags the items that you selected in Step 2.
 - **All Items.** Tags all items returned by your search query including any items that were added in with the “Bring in Complete Family” function. See [“Bring in families” on page 20](#).

5. Select what type of data to include. You can choose to include all document families or all document families and discussion threads across the case that are related to the selected items.
 - A document family is the parent document and all attachments.
 - A discussion thread is any email message and all replies and forwards. This option tags all reviewable items within a document family that are listed as a discussion thread.
 - An item is any individual email message, attachment, or embedding.
6. The Sample option helps determine whether you want to tag all items or a subset. By default, all items are included in the sample. By default, all items are included in the sample.
 - Specify the percentage of tagged items

or

- Specify the number of items
- Select whether items and documents in a sample set should be chosen randomly

Note: If this option is not selected, items and documents are tagged in the order that they are displayed in the Document view.

7. Add a comment in the event log for auditing purposes.
8. Add an item note to all tagged items. This will overwrite the item note for all of the selected items.
9. Select or deselect tags within the tag hierarchy

The tag tree icon  indicates that bulk document family propagation tagging is enabled. In this example, if the Privilege tag is applied to any item in a document family, the tag is propagated to *all* items in the document family.

10. To send an email notification of the tagging summary, specify the email recipient from the drop-down **Send summary to:** list.
11. Click **OK**.

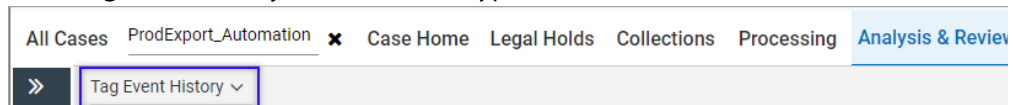
The task may take some time to complete, depending on the number of documents. Click **Jobs** at the top of the screen to view the status of the task. To cancel the task, click the red icon next to the task in the Jobs window.

Using the Tag Event History Screen

When you submit an advanced tag event history search (see [“Tag Event History Searches” on page 44](#)), the Tag Event History screen lists all the tag events in the tag history search results. If you search for specific comment text, the results are sorted by relevance score. Each tag event includes the author, the date and time of the tag event, the associated folder (if any), and the number of documents that were tagged with the comment. Note that the Searched and Found counts indicate the number of tag events, not the number of documents.

To view the Tag Event History screen

1. Select **Tag Event History** from the search-type list.



2. Specify the search criteria.
3. Click **Search** to view the retrieved search results on the Tag History screen.

Viewing Tips

- If both a tag event comment and item note were added, each will appear as a separate line item under the Notes & Comments column.
- For preset reason codes, the **Tag Changes** column prints the reason code for the first time a document is tagged. If the document is tagged with the same reason code a second time, the reason code will not be displayed in the **Tag Changes** column. Instead, this second action is recorded under the **Notes & Comments** column. This behavior works the same way for untag operations.

Author	Date ▼	Folder Changes	Tag Changes	Notes & Comments	Documents	Items
superuser	02/25/2022 8:21 PM IST		TagSet_Checkbox Tag 5: TAG Tag 6: TAG		1	3
> superuser	02/25/2022 8:21 PM IST		RedactionTagSet Redacted: TAG Redacted:Default: T	Tag Event Comment: Redactions changed for file: 1 redactions added with reasoncode: [no reason code]	1	1
superuser	02/25/2022 8:20 PM IST		RedactionTagSet Redacted:Default: U NTAG	Tag Event Comment: All redactions removed for file: 6 redactions deleted with reasoncode: [no reason code]	1	1

For instructions on how to use this screen, refer to the following tables.

Tag Event History Screen - Icons and Functions

Icons or Function	Description
	Determines how many records are displayed on a page. Use the Documents per page drop-down list to change the number of documents that are displayed on each page.
	Pages through the retrieved documents. Enter a page number and press Enter to go to that page or use the arrows to go to the next or previous page.
Underlined document links	Displays all the documents that have this tag assigned and allows you to add additional tags and comments.

The following table describes the columns in the Tag Event History Search results.

Tag History Screen - Search Results Columns

Column	Description
Author	User who assigned the tag.
Date	Date that the tag was assigned.
Folder Changes	Changes to the folder assignment
Tag Changes	Changes to the tag selections
Notes & Comments	Tag event comments as well as item notes added (each appearing on separate lines)
Documents	Number of documents tagged.
Items	Number of items tagged
Score	Relevance score.

Using Review Sets

Review set management provides an easy way to coordinate review. Folder management enhancements allow reviewers and case managers to create and organize folders when preparing batches for review.

- [*"Begin Review" in the next section*](#)
- [*"Pause or Complete Review" on page 143*](#)
- [*"Edit or Delete a Review Set" on page 144*](#)
- [*"Assign a Review Set to Another Reviewer" on page 144*](#)
- [*"Creating and Organizing Folders" on page 144*](#)
- [*"Organizing Items in Folders" on page 146*](#)
- [*"Run a Production \(on a Productions Folder\)" on page 148*](#)

Review Set Management

Reviewers and case managers can track which review sets are in process of being reviewed, which review sets are complete, and which review sets are assigned to which reviewer. In addition, case managers can complete a review begun by another reviewer.

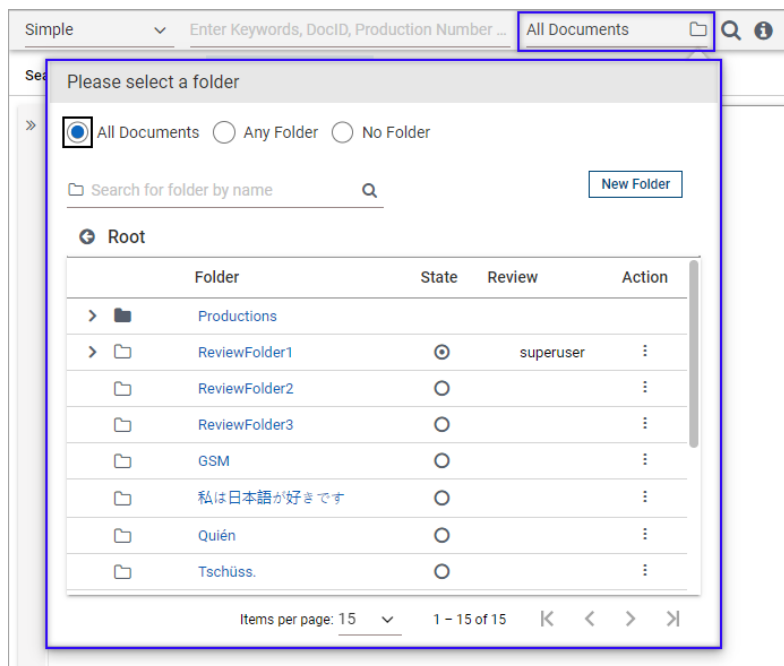
Begin Review

To start reviewing a review set

Note: Working on a review set does not prohibit others from searching on, viewing, or tagging the documents in the folder.

1. From the **Analysis & Review** module, click the **Folder option**  icon.

The folder management pop-up window appears, with a table showing the folder hierarchy. (Folders may already have been created by the case manager. If you have permissions, you can create new, or reorganize folders for your review.)



Note: Provided reviewers initiated the **Begin Review** from the action menu for their review set, a reviewer can hover over the State circle to get the current review state and see who (superuser) is working on a particular batch.

2. Select from **All Documents**, **Any Folder**, or **No Folder** for review.
3. Click the  icon next to any folder (those containing subfolders) to view its contents. As you click through various levels of the folder hierarchy, breadcrumb navigation appears above the list of folders to indicate your current folder location. You can also click on any link in the breadcrumb to jump to that level in your folder hierarchy. To return to this home screen, click the Back to previous link  icon.
4. Click **Folder actions**  icon under the action column, then select **Begin Review** (A dot in the circle indicates that the folder is being reviewed.)

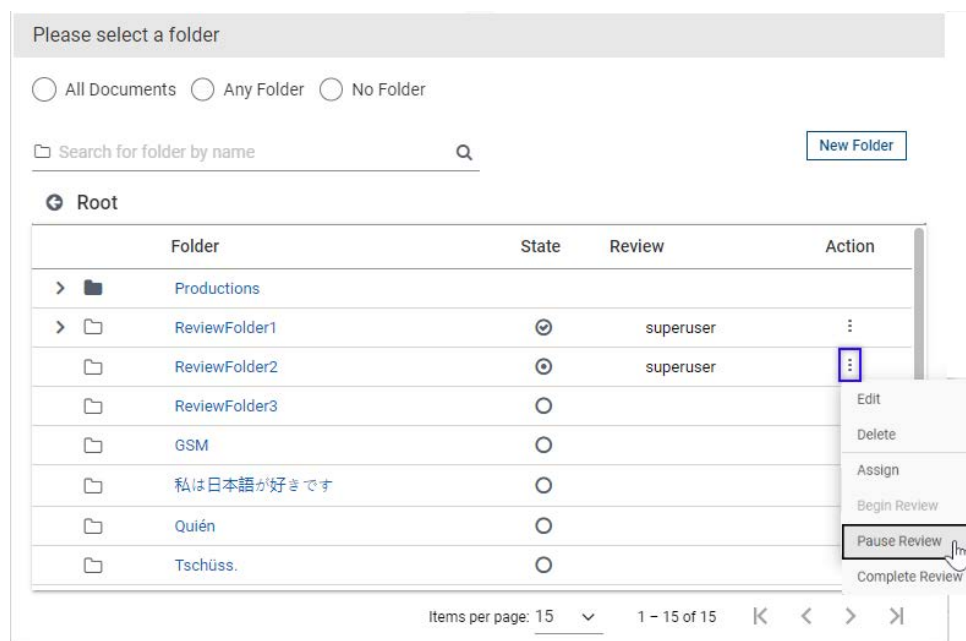
Your name appears in the “Review” column. (You may need to refresh your screen to see the dot appear.) You can also rollover the State icon to view a tool-tip message describing the current status.

Pause or Complete Review

To pause or complete the review of a review set

Note: If you are pausing or completing a review set for a reviewer other than yourself, you must have the “Allow folder check-out management” permission to stop or complete a review begun by another reviewer.

1. In the **Analysis & Review** module, click the **Folder option**  icon.
2. Click to navigate to, or select the review set that you want to pause or complete reviewing.
3. If pausing review, click **Folder actions**  icon, then select **Pause Review**.



A dot in the circle, which indicated the review set was in progress, is cleared.

4. If review is complete, click **Complete Review**. The window closes automatically. To check the current state, re-open the window to the folder you completed. Note that the dot is replaced by a check mark inside the circle to indicate the review is complete.

Edit or Delete a Review Set

To edit or delete folders

1. On the left navigation bar of the **Analysis & Review** module, click **Folders**.
2. Click to navigate to, or select the review set that you want to edit or delete.
3. If editing a review folder:
 - A. Click **Folder actions**  icon next to the folder you want to edit (change the name or description), then click **Edit**.
 - B. On the Edit Folder window, change the name of the folder and/or description.
 - C. Click **OK**.
4. If deleting a review folder:
 - A. Click **Folder actions**  icon next to the folder you want to delete, then click **Delete**.
 - B. On the Delete Folder window, click **Delete** to continue deleting the folder. (Folder contents will not be deleted, but will remain in the "All Documents" collection.)

Assign a Review Set to Another Reviewer

To assign review access to another reviewer

Note: You must have the "Allow folder check-out management" permission to enable users to access review set folders. Check with your Case Administrator for further details.

1. In the **Analysis & Review** module, click the **Folder option**  icon.
2. Click **Folder actions**  icon next to the folder you want to assign, then click **Assign**.
3. On the Assign Review Access window, click and drag user names from the left "Available Users" box to the right to designate them as "Assigned Users".
4. When finished, click **Done**.

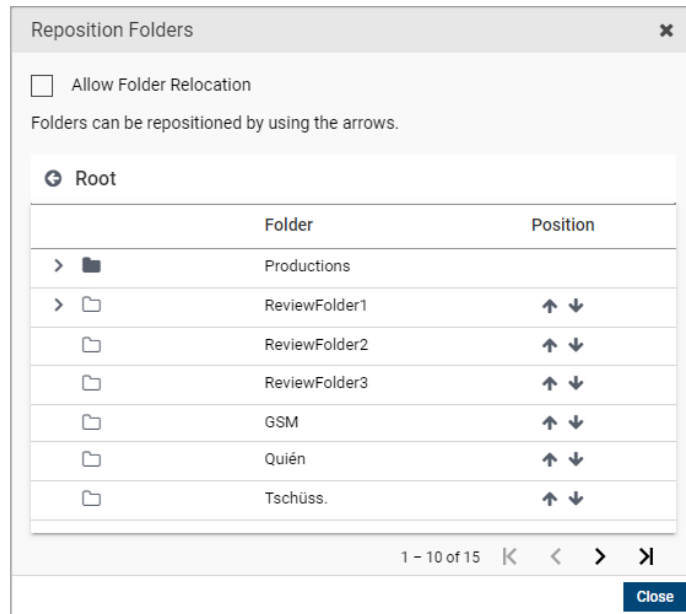
Creating and Organizing Folders

To create a new review set folder and rearrange folders

1. On the left navigation bar of the **Analysis & Review** module, click **Folders**.
2. To create a new top-level review folder, click **New Folder**.
3. On the Create New Folder window, type a name and description (optional) for the new review folder, then click **OK**.
Your new folder is shown in the Folder table.
4. To create a review set under a parent folder, click to select the folder, then click **New Folder > As Sub-Folder of Selected Folder**.

- On the Create New Folder window, type a name and description (optional) for the new sub-folder, then click **OK**.
- To re-order the position of the folders, click **Reposition Folders**.

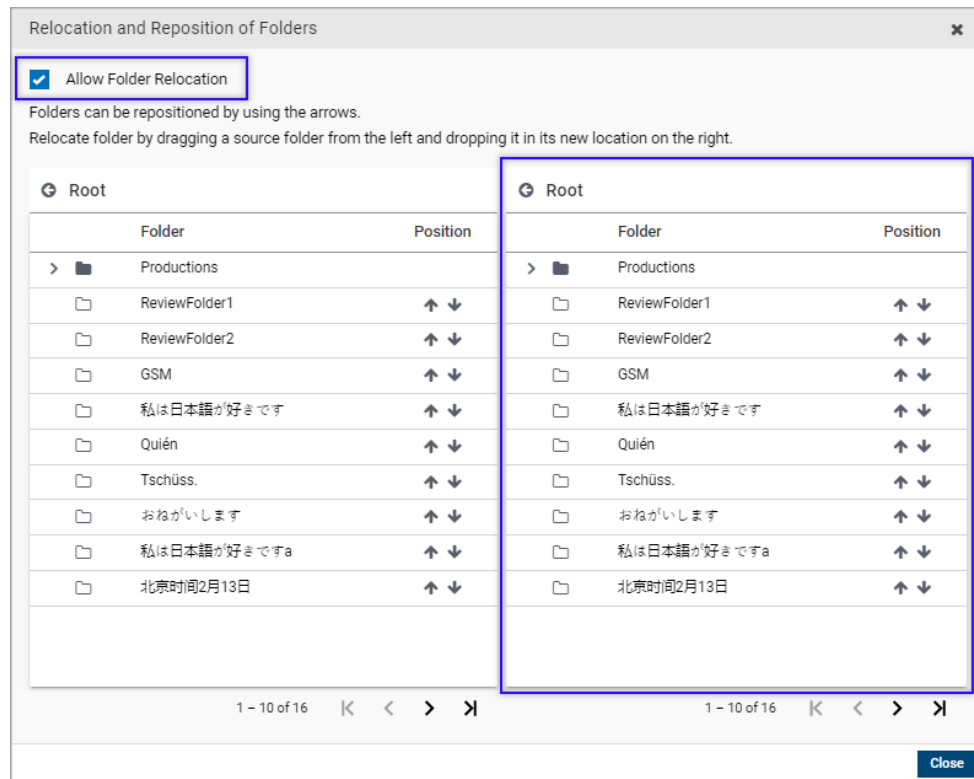
The Reposition Folders window appears.



Navigate to any sub-folder and a breadcrumb navigation trail will show your current location. (Click the Back to previous link  icon to return to the previous screen.)

- Click the arrows  to reposition folders in the folder structure.
- Click the  icon next to any folder to reposition its subfolders.

9. (Optional) Select the **Allow Folder Relocation** option to allow relocating folders between levels. When selected, a second pane appears as shown.



This allows you to drag and drop source folders from the left pane to its new folder location on the right.

10. When finished, click **Close**.

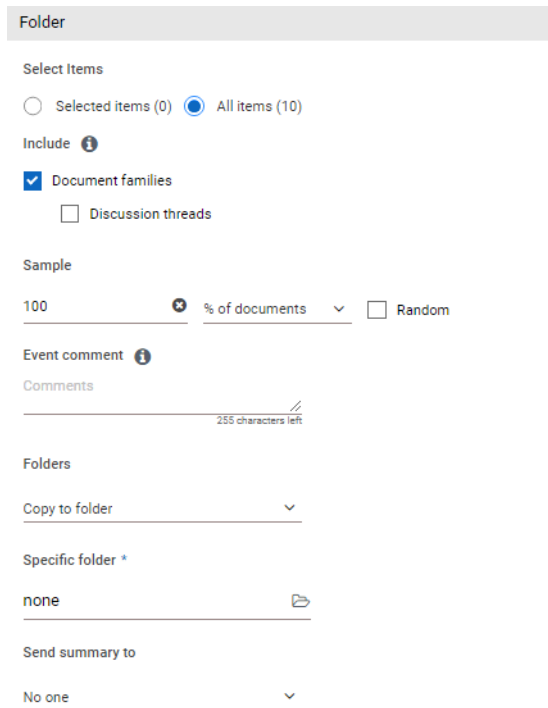
Organizing Items in Folders

Using the **Bulk actions menu**  > **Folder** single screen dialog, you can easily manage items within your case. The Folder window enables you to

- Add items to a folder
- Copy items to folder
- Move items between folders
- Remove items from folders

To copy, move, or remove items in folders

1. From the **Documents** screen, select the items you want to organize by checking the item's check-box.
2. Click **Bulk actions menu**  icon > **Folder**.
The Folder window displays.
3. Choose whether you want to organize the selected items, all items within your search results.
4. Specify whether you want to include all Document families with or without discussion threads across the case that are related to the selected items.
5. The Sample option helps to determine whether you want to include all items or a subset of them. By default, all items are included in the sample.



Folder

Select Items

☐ Selected items (0) ☒ All items (10)

Include ⓘ

☒ Document families

☐ Discussion threads

Sample

100 * % of documents ▾ ☐ Random

Event comment ⓘ

Comments

255 characters left

Folders

Copy to folder ▾

Specific folder *

none 📁

Send summary to

No one ▾

- Specify the percentage of items

or

- Specify the number of items
- Select whether items and documents in a sample set should be chosen randomly

Note: If this option is not selected, items and documents are included in the order that they are displayed in the Document view.

6. Provide an **Event comment** in the text box. The text will appear in the event log for auditing purposes.
7. Specify whether you want to copy, move or remove the items.
8. Select the target folder (where you want to place or remove the selected documents).
9. Optionally, specify the recipient of an email summary notification.
10. Click **OK**.

Run a Production (on a Productions Folder)

If you want to run a production job, click the **Folder actions**  icon next to the Productions folder then click **Lock/Produce**. For more information, refer to the section ["Running a Production" in the Case Administration Guide](#).

Review, Annotate and Redact

The information in this section applies if you have licensed the Review, Redaction, and Production module. However, for cases which your administrator has enabled the LIHO (a non-standard) billing option, these features will be unavailable unless the selected documents were specifically designated for review. Documents to be reviewed must be in the (red) Review folder to be available for review and redaction.

Starting with release 10.0, eDiscovery Platform uses PrizmDoc Viewer that provides a powerful document viewing and document conversion functionality. PrizmDoc Viewer includes an advanced HTML Viewer control which allows users to view, search, annotate, redact, print, and download documents in many different file formats, right in their HTML5 browser. It does not require to install any custom software, such as Active-X.

PrizmDoc Viewer is used to review documents in the following modes:

- Native View
- Redaction/Annotation View
- Production View

The Review and Redaction module provides the following capabilities:

1. **Native Viewing**
Provides the ability to view documents in their native format without requiring each application to be loaded on a reviewer's workstation. Both text search and hit highlighting are available within the Native Viewer, increasing reviewer productivity.
2. **Annotation and Redaction**
Enables reviewers to quickly and easily annotate and redact documents in multiple colors, apply reason codes, and verify redactions prior to production. Reviewers can redact specific text, pages, or areas within a document.
3. **Redaction Verification**
Enables reviewers to rapidly navigate through each redaction within a document as part of the quality control process. Reviewers can leverage reason codes to quickly perform checks and verify the accuracy of all redactions.
4. **Redact Privacy Info**
Accelerates redaction by automatically finding and redacting keywords, phrases, and personal information, such as phone numbers, Social Security numbers, date of birth, and email addresses.
5. **Persistent Hit Highlighting**
Highlights search terms in messages, attachments, and files within the Native Viewer, allowing reviewers to simultaneously view highlighted search terms from the most recently performed searches.

This section describes Reviewing and Redacting documents. Refer to the following topics:

- [“Accelerating Review with Caching” in the next section](#)
- [“Reviewing Documents” on page 156](#)
 - [“Using the Document Review Screen” on page 156](#)
 - [“Linear Review Tools in Review Mode” on page 160](#)
- [“Native View” on page 163](#)
 - [“Understanding the Native View Interface” on page 163](#)
 - [“Viewing Documents in Native View” on page 164](#)
 - [“Searching within documents in Native View” on page 166](#)
 - [“Using Other Tools in Native View” on page 170](#)
- [“Annotation and Redaction View” on page 171](#)
 - [“Annotating Items” on page 171](#)
 - [“Understanding the Annotation Interface” on page 172](#)
 - [“Redacting Items” on page 176](#)
 - [“Understanding the Redaction Interface” on page 178](#)
 - [“Redaction Tools” on page 179](#)
 - [“Redaction Display Options” on page 181](#)
 - [“Searching within Documents in Redaction View” on page 184](#)
 - [“Redact Privacy Information” on page 186](#)
 - [“Redact Using Preset Reason Codes” on page 187](#)
 - [“Auto populating the Comments panel in the Redaction/Annotation view” on page 188](#)
- [“Managing Redactions” on page 190](#)
 - [“Saving Redactions” on page 190](#)
 - [“Editing Previously Redacted Documents” on page 190](#)
 - [“Deleting Redactions” on page 190](#)
 - [“Viewing Redaction Details” on page 190](#)
 - [“Verifying Redactions” on page 191](#)
 - [“Using Redaction Colors” on page 192](#)
 - [“Print and Download” on page 193](#)
- [“Tracking Redaction Changes” on page 195](#)
- [“Bulk Redaction” on page 196](#)
 - [“Considerations and Best Practices” on page 196](#)
 - [“Basic Bulk Redaction Workflow” on page 198](#)

- [“Monitoring Bulk Redaction Jobs” on page 202](#)
- [“Shortcut Keys for Review in eDiscovery Platform” on page 204](#)
- [“Reviewing Journal Envelope Information” on page 205](#)
- [“Production View” on page 207](#)
- [“Displaying redaction reason codes for fully redacted documents” on page 207](#)

Accelerating Review with Caching

Caching enables a reviewer or case manager to convert a set of documents to their native format preemptively through (or via) a background process. The set of documents can be either a search result or the content of a folder. Use of this has a dramatic impact on the review process by eliminating the real-time conversion seen by the reviewer. Instead, the response (or display) to the reviewer is immediate.

In the review caching dialog, users set the maximum time that any given document should be tried is required. This enables a “multi-pass” approach, where a shorter timeout, such as three minutes, is used in the first run. In turn, this allows the majority of documents to complete successfully, with larger timeouts to be used in one or more subsequent jobs. As a result, documents that were successfully imaged in an earlier run are skipped very quickly in later runs; and a later job with a longer timeout will then shift to the more time-consuming large documents.

In addition to the “max time per item” control, two options are available for skipping documents that may be problematic. This allows time to be used to process the majority of items while segregating those that may consume inordinate resources. Items can be skipped based on the file size or known page count. These optional criteria can also be used to isolate documents which may be time- or resource-consuming to image in favor of completing a larger number sooner.

To help with managing the imaging workflow, an “analyze” (**Calculate Imaging Totals**) option reports the amount of work contained in an imaging job (review caching or production locking). The number of items (messages, attachments, and loose files) is counted, subtracting the number of items already imaged. (This is particularly useful to show the work remaining in a production job when review caching has already been run.) Additionally, the impact of applying the optional “skip” criteria can be evaluated before the job starts.

To cache a set of documents

Before you begin: You must belong to a user group with review preparation permissions.

1. Access your review set by running a search query or opening a review folder.
2. Select the items to cache, (or none if you want to cache your entire results).
3. From the Snippet View of the Documents screen, click **Bulk actions menu**  icon > **Cache**.

The Cache screen displays.

Cache

The documents you select will be cached to improve the speed of review. Depending on the number of documents, this could be a resource intensive operation.

Select Items

☐ Selected items (1) ☒ All items (20,918)

Options

☒ Native [Advanced Settings](#)

☒ Retry previously failed documents ⓘ

☒ HTML

☐ Cache highlighting ⓘ

Schedule

☐ Set start date/time

MM/DD/YYYY HH:MM

Job time limits

☒ Run to completion

☐ Stop by

MM/DD/YYYY HH:MM

Cancel Cache

4. Specify the following information.

Document Caching Options

Field	Description
Select Items	Select one of the following options: • Selected items - Caches only the subset of documents you have selected from your search. • All items - Caches all documents from your search results.
Include	Select the check box Document families . This includes all document families across the case that are related to the selected items. • A document family is the parent document and all attachments. • An item is any individual element such as an email message, attachment or embedding.

Document Caching Options

Field	Description
Options	Select one of the following formats to cache documents: • Native – Advanced settings— Allows you to analyze and control what Native Imaging documents to cache or skip over. These settings are especially useful when deciding how to handle very large documents and to ensure optimal use of caching to speed up production and review processing. A calculator function allows you to more accurately estimate the documents that are going to be imaged. – Be aware that Counts for Total unique items selected on the Native Image Advanced Settings menu can be greater than the total items selected for caching on the Imaging & Rendering > Managing Native Images menu. This is because caching is performed at a document family level. Note: Items that are imported through load files are not subject to the user criteria and are not skipped. • HTML – Cache highlighting—Prepares highlighted HTML pages. The prepared pages can only be reused if the documents are reviewed with the same search terms and the same searches are applied for highlighting during review. • Retry previously timed out documents—Restart the caching job if a timeout occurs. Timeouts may occur during native review or a previous cache job. Once a document has timed out, it will not be attempted again unless this option is selected. Note: Using the Retry option could significantly slow down native review on the system. If a caching job is stopped before completion, all documents processed before the job stopped are available for use.
Schedule	• Set start date/time—Select the check box and click the drop-down button to select a date from the calendar
Job time limits	Select one of the following options for when to stop the cache job: • Run to completion—Do not stop caching until job is complete. • Run for...minutes—Enter the number of minutes in which to run the job before stopping. • Stop by...—Enter a date, or select a date/time from the calendar when the cache job will be stopped.

5. (Optional: Steps 5-7) To take advantage of caching options for Native Imaging documents, click **Advanced Settings**.

The Native Imaging Advanced Settings screen displays.

Native Imaging Advanced Settings

Maximum Time Per Item *
3 minutes

Skip by Maximum Limits: (Only loose files/attachments)

☐ Page Count ☐ File Size

Pages MB
0 0

Calculate Imaging Totals

Results

Total unique items selected	3
Already imaged	(3)
Exceeds limits	0
Not cacheable	0
Total items to be imaged	0

Cancel Save

6. Specify the following information.

Native Imaging Advanced Settings

Field	Description
Maximum Time Per Item	While attempting to cache an item, if the system exceeds this amount of time the system stops caching this item and moves on to the next item. The default value is set to 3 minutes. Note: The default time cannot be set to less than 3 minutes.
Skip by Maximum Limits (Only loose files/ attachments)	Items that exceed these maximum limits will not be imaged. This only affects loose files and attachments. Email messages that exceed the maximum limits will be imaged normally. Specify values for any of the following items: • Page Count— By default, only PDF and PPT files have page counting features enabled. MS Excel and MS Word files can be enabled by calling support. Items that exceed the user-provided maximum page count will be skipped. • File Size—Items that exceed user-provided maximum file size are skipped for caching.

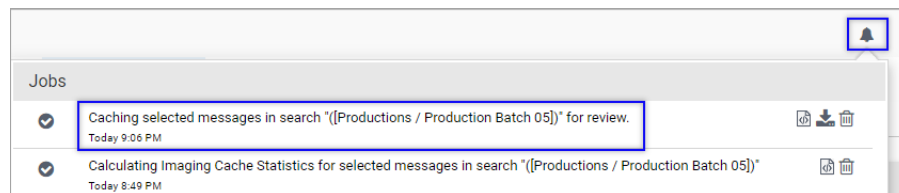
- Click **Calculate Imaging Totals** to see what is going to be imaged based on your entries for the settings and criteria. Results include the items that are present in the production folder.

The totals are displayed in the **Results** section.

A new job will be created each time you Calculate Imaging Totals. View and compare results through the job status logs in the Jobs window.

- Click **Save** to return to the Cache screen.
- Click **Cache**.

The progress of the job displays in the Jobs window.



When the job completes, a log file is available for download. The log file contains a list of the files that failed to convert.

Reviewing Documents

Note: The information in this section applies if you have licensed the Review, Redaction, and Production module.

The Review Mode allows for faster review by optimizing screen real estate, enabling user customizations, and reducing number of clicks to tag a document. Activate Review Mode by clicking on the right-most icon in View options on the Documents screen or by clicking the Review  icon from the **Actions** column.

Note: For a faster redaction/annotation session, it is recommended to cache the review set first. If caching is not done, auto-cache occurs in the background for the next 5 items in the search results.

Using the Document Review Screen

The Document Review screen allows you to view the document contents, tag, and add review notes. See [“Filtering Search Results” on page 61](#) for more information on the redaction and production options that are available in Review mode.

To view the Document Review screen

1. Select a document and click the associated Review  icon.

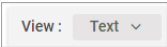
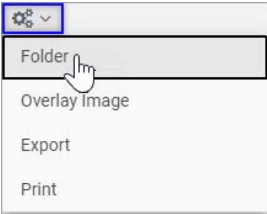
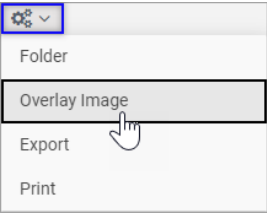
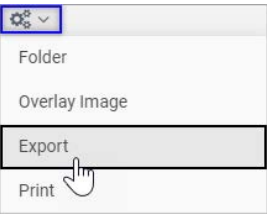
The review mode view displays.

Note: This view will be unavailable if your case administrator has selected a different billing model for this case, which requires all documents for review to be in the Review folder. A warning message appears in the document display area of the Review Mode screen indicating that the document cannot be reviewed because it is not in the Review folder.

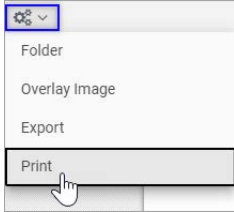
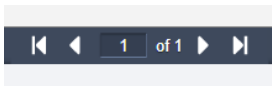
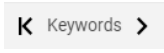
Tip: Use the breadcrumb links to easily navigate up and down your review path or to see where your current review page is in relation to your search results hierarchy. In Review mode, the breadcrumb navigation is located above the **View:** Text drop-down menu on the right-hand side.

2. Refer to the following table to perform tasks on this screen.

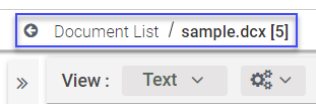
Document Review Screen - Icons and Functions

Icons or Function	Description
	Change the viewing mode and access redaction and production controls. Click the arrow and choose one of the following: • Text—View document in text mode. • Native/Image—View the document in native format. See “Native View” on page 163. • Redactions/Annotations—Display redaction controls using the selected redaction set (usually Default). See “Annotation and Redaction View” on page 171. • Production—See “Filtering Search Results” on page 61. Note: The default view of a document is Native View. If you need Text View as the default view, contact your administrator.
	Folder Copy or move to a folder, remove from a folder, or print the document. Click Actions menu  icon and click Folder. In the Folder dialog box, choose one of the following: • Copy to Folder—Select the destination folder, and click OK. • Move to Folder—Select the source and destination folders, and click OK. From the Move to Folder window, you can choose include subfolders by selecting the Include Subfolders check box at the below the box of folders you are moving the document from. (This action can also be done from the Bulk Actions menu  icon outside of Review mode.) • Remove from Folder—Select the folder, and click OK. Select the include subfolders option to remove documents from the folder (and all subfolders).
	Overlay Image Overlay native images accessible in review mode with one or more images from an external tool. See “Pre-Process Your Source Data” in the Case Administration Guide.
	Export Export search results. Refer to the “Export and Production Guide”.

Document Review Screen - Icons and Functions (Continued)

Icons or Function	Description
	Print Print selections. See “Printing Documents and Logs” on page 214.
Auto-save	Automatically saves your redactions when you advance to the next document. See “Redacting Items” on page 176.
Delete Redactions/Annotations	Deletes redactions and annotations. See “Deleting Redactions” on page 190.
	Opens the Discussion List screen, See “Using the Discussions Screen” on page 125.
	Pages through the retrieved documents. Enter a page number and press Enter to go to that page or use the arrows to go to the next or previous page.
	Allows you to navigate item to item. It represents the serial number of the document family and not the item number. For example, if there is a document family with a parent message and 3 attachments and if this document family is 7th in search results, then while navigating through these 4 items in the document family, the ID displayed will still be 7.
	Allows you to navigate throughout the search hits, both within the item as well as across items.
Tag Pane	Allows you to perform tagging actions. See “Bulk Tagging Reviewable Items” on page 135. Click Configure visible tag sets  icon. See “To configure visible tag sets” on page 161. If the  tag tree icon is displayed to the right of the tag, then bulk document family propagation tagging is enabled.

Document Review Screen - Icons and Functions (Continued)

Icons or Function	Description
Related Items Pane	Lists items associated with the document. Click the arrow and select an item type (attachments, discussions, similar items, or tag history). If there are no related items, the menu shows None. For Attachments, perform any of the following actions: - Click the Attachments  icon to display the item. - Click the Download  icon to download the item to your local system. - Click the Find Similar  icon to locate similar items. - Click the review related items warning  icon to read and assess warning messages. For Discussions, perform any of the following actions: Tag—Click Actions menu  icon > Tag to open the pop-up tag window. See “Bulk Tagging Reviewable Items” on page 135. Export—Click Actions menu  icon > Export to open the pop-up export window. Refer to the “Export and Production Guide” for more information. Print—Click Actions menu  icon > Print to open the pop-up print window. See “Printing Documents and Logs” on page 214. Folders  —This will appear if the document belongs to any folders. The Similar Items  icon displays the items found to be similar according to the threshold in the Find Similar setting. The Custom Attributes  icon appears if the documents in your search results contain custom fields (created during load file import). See also “Viewing Related Items within Review Mode” on page 161. Click any of the Subject/Filename headers to view that item. Click the icon to the right of any subject/filename header to find similar items. Note: The product does not currently support searching similar documents to derived discussion messages. Thus, the Similar Items link in Review mode is not displayed. If you choose Tag History , the panel displays a read-only list of tagging actions. Click any of the column headers to sort or select different columns to display.
 Open Close	Click the Open icon to open the current panel in a new window. To reverse the operation, click the Close icon.
	Breadcrumb navigation indicator above the filter area shows the pages through which you have navigated to get to the current page. When you switch to Review Mode this is located above the View: Text drop-down menu.

Linear Review Tools in Review Mode

Tag Pane

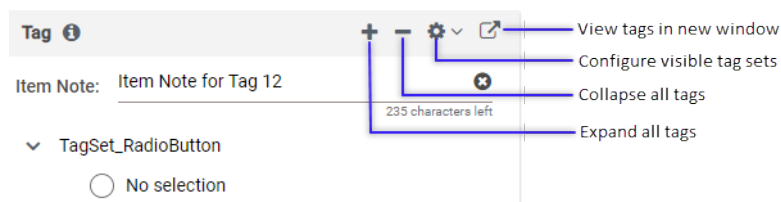
The tag pane enables you to manage document families (such as an email with all its related attachments) and individual items (such as attachments, embeddings, loose files, and emails) using various tagging tools. Manage items and document families by assigning tags to folders and flagging them with predefined tags in the tag categories that matter to you.

For example, you can organize related documents into folders for further analysis by a team of reviewers, who can then retrieve the documents assigned to them, tag the documents, and enter notes.

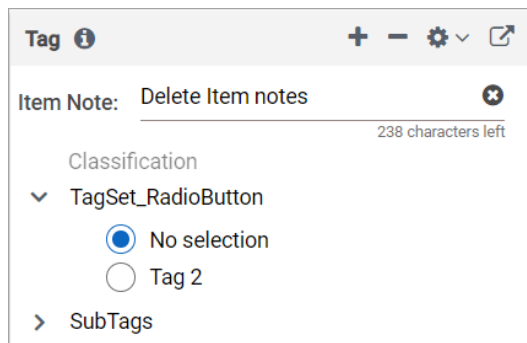
Note: Items that are redacted are automatically tagged with the Redacted tag under the Redaction tag set.

Tag Pane Views

Use the tag pane options to change views depending on your preference.



Note: Use the “Configure all visible tag sets” option to view only the documents with the tags you select from all your tag sets.



Tag Pane Navigation

- **Save.** The **Save** button at the top of redaction or annotation interface allow you to move back or forward through reviewable items, one at a time. Any tagging changes would be saved before navigating away from the current view. To tag as you view documents and items, use the Tagging Options.

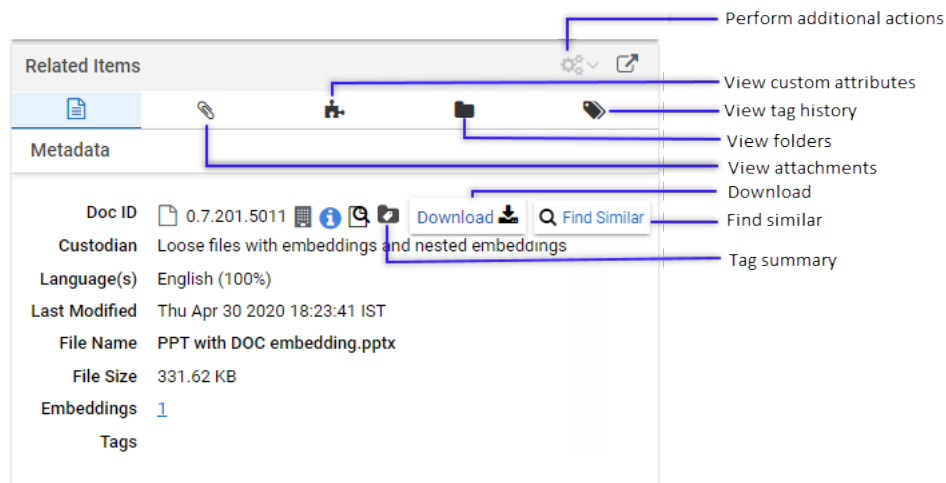
To configure visible tag sets

Control your review experience by configuring the Tag pane to display only the tag sets you need and to advance through the search results as you prefer.

1. From the Tag pane, click the **Configure visible tag sets**  icon.
2. In the Options dialog box, select the tag sets you want to display in the Tag pane.
3. Specify how you want to advance through the reviewable items.
 - **Auto Advance.** Selecting a tag automatically applies the tag and immediately moves you to the next item without the need to click **Save and Next**. This selection determines the next reviewable item, both on clicking "Save and Next" as well as in explicit item to item navigation in native viewer.
 - **Skip Attachments and Embeddings.** This option preserves legacy functionality when the product advances to the next document family rather than the next reviewable item.
 - **Skip Non-matching items.** Displays only reviewable items with search result hits.
4. Click **OK**.

Viewing Related Items within Review Mode

Attachments, Discussions, Topics, Similar Docs, Folders, and Tag History are all accessible from Related Items enabling you to view, find similar, tag, and bulk tag without changing modes.



Related Items and Find Similar Keyboard Shortcuts

- To view the document in the review pane: in Review Mode, from the Related Items view, you can **CTRL+click** on any item.
- To show the differences between the review document and a document from the Find Similar list: in Review Mode, from the Find Similar view, you can **CTRL+SHIFT+click** on any item.

When viewing similar items within Review mode, clicking the **Similar Items**  icon displays the Find Similar histogram. From Review mode only, this histogram provides the option to apply your desired similarity threshold settings for viewing the list of similar items in the Related Items box.

If your results set contains custom attributes, the **Custom Attributes**  icon appears, making any fields your case administrator designated as Custom Attributes (from load file imported data) searchable.

Click the icon to view attributes and their associated values. Click the arrow on each column name to sort or rearrange the column order.

Item Note

If your administrator has allowed item note editing and viewing privileges, the Item Note box appears in the Tag pane above the tag categories. Click the up-arrow icon above the Note text box to hide this pane. Users with role assignments of **System Manager**, **Group Admin**, **Case Admin**, **Case Manager**, **Case User**, and **eDiscovery Admin** have the privilege by default.

Note: Item notes can be used to explain tagging decisions or highlight other helpful case review annotations.

Native View

When you enter in a review mode, the documents are displayed in Native View by default.

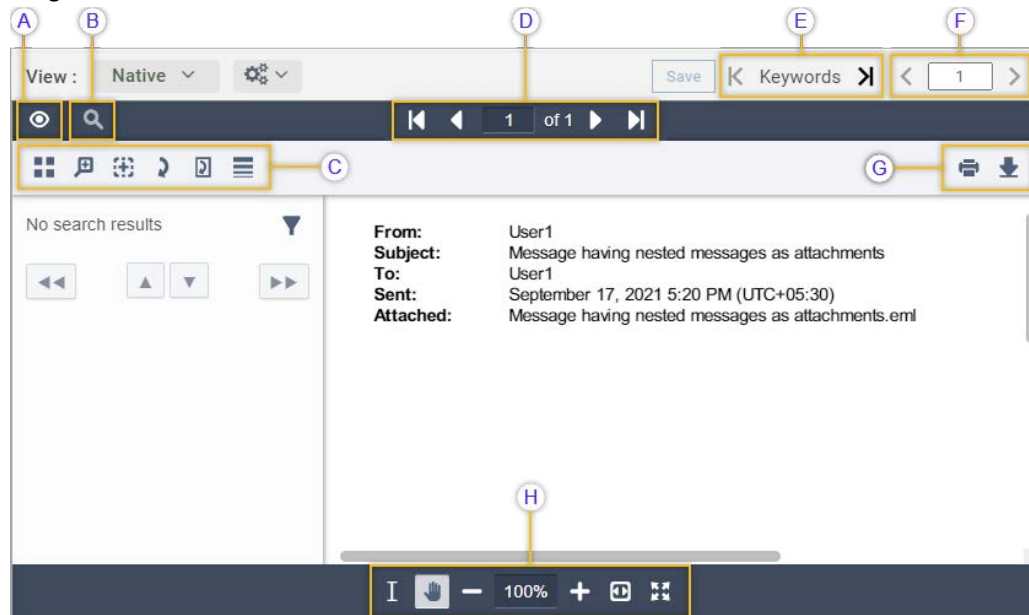
In Native View, you can view documents, search within a document, print and download the document.

The PrizmDoc Viewer displays different file types (including Outlook, Notes, and Microsoft Office documents) that is equivalent to the view generated when printing that same document using the native application. It does not require any installation of native applications on the user's computer. Native viewing of a document enhances document review, especially for documents (such as Excel and PowerPoint) where graphs and charts are important to understand the meaning of the document.

Note: If the document is scanned to PDF, the PrizmDoc viewer takes it as an image; therefore, it cannot search for keywords in Native View.

Understanding the Native View Interface

The Native View provides various document viewing option as highlighted in the following image.

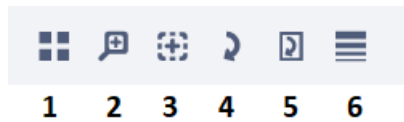


- A. **View Tab** - Provides options to view the documents., such as thumbnail, magnifier, zoom, rotate, etc. See [“Viewing Documents in Native View” on page 164.](#)
- B. **Search Tab** - Provides options to search words or phrases. See [“Searching within documents in Native View” on page 166.](#)
- C. **View/Search Tools** - Provides various tools for View and Search tabs.
- D. **Page navigation** - Provides page navigation, such as the first page, the last page, next, and previous page.

- E. **Keyword navigation** - Navigates through the search hits both within the item as well as across items.
- F. **Document navigation** - Provides document to document navigation.
- G. **Print/Download** - Provides options to print or download the document.
- H. **Display options** - Provides various document display options, such as text selection, pan tool, zoom in and out, full screen mode, etc.

Viewing Documents in Native View

When you click the **View** tab, the following viewing tools are displayed.



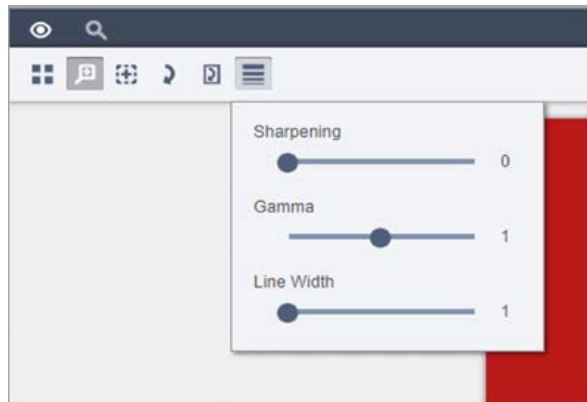
1. **Thumbnails** - Allows the user to view and navigate to each page within a document.



2. **Magnifier Tool** - Makes it easy to view the document in the most efficient way for review even in cases where a document may contain small text or images.



3. **Rectangle Zoom** - allows a user to zoom the selected area.
4. **Rotate Document** - Rotates the document.
5. **Rotate Page** - Rotates the page.
6. **Image Tools** - Allows a user to set Sharpening, Gamma, and Line width.

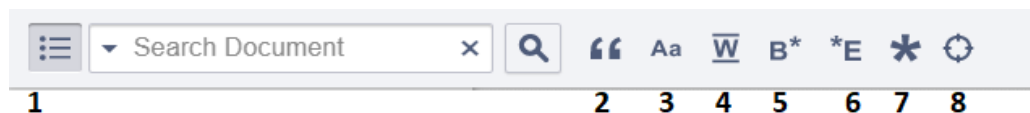


Searching within documents in Native View

You can use the **Search** tab to search specific keywords and phrases in the document.

The PrizmDoc Viewer supports hit highlighting of search terms, which are automatically highlighted within documents returned by a search query. Term highlighting greatly aids review by drawing attention to terms relevant to the issues within the case. Term highlighting can also significantly improve the speed and accuracy of redaction by drawing attention to parts of the document that might require redaction and reducing the chance that they are missed.

The search terms and privacy info patterns specified using the Persistent Hit Highlighting option in the Processing settings for the selected case are also displayed under the Search Document list, and these search terms are highlighted in the specified highlight color within the document when PrizmDoc Viewer is used. This feature is not available when documents are viewed in text/html mode.



1. **Search Options** - Shows and hides the search result and filter panel.
2. **Match Exact word or phrase** - Searches for exact word or phrase.
3. **Match Case** - Searches for words or phrases with a matching case.
4. **Whole Word** - Searches for whole words.
5. **Begins With** - Searches for the word that begins with the specified characters.

For example: info - Search all occurrences of words, such as "information" that begin with "info"

6. **Ends With** - Searches for the word that ends with the specified characters.

For example: unity - Search all occurrences of words, such as "opportunity" ending with "unity"

7. **Use Wildcards** - Searches for words or phrases that begin, end, or contain the specified characters.

For example:

- info* - Search all occurrences of words begins with "info"
For example, information
- *unity - Search all occurrences of words ends with "unity"
For example, opportunity, community
- *stall* - Search all occurrences of words that contains "stall"
For example, Installment
- c*unity - Search all occurrences of words begins with "c" and ends with "unity"
For example, community

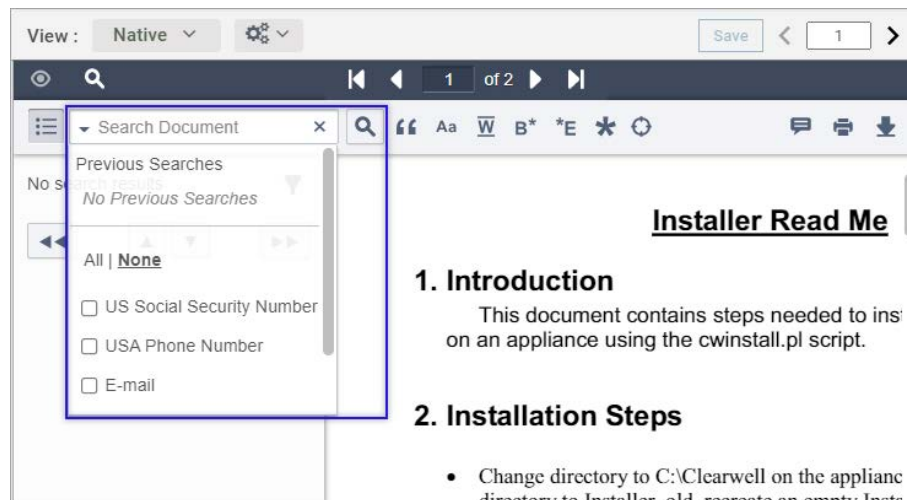
8. **Proximity Search** - Use search query in the format: "term1 term2 ~n", where n is a positive number indicating the maximum number of words between term1 and term2.

For example:

- students adventure ~6 - Search all occurrences of phrase in the document that begins with "students" and ends with "adventure" with at least 6 words distance between words "students" and "adventure" in phrase.
For example, students have finished SOCI 348, their learning adventure

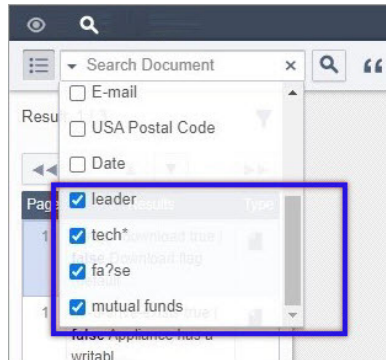
Search Results Panel

You can perform a search using the search options as described above. The Down arrow in the **Search Document** input field shows the previous search term along with the Privacy Info list. You can click on any previous search term to populate previous result in search result panel. You can select for Privacy Info using **All** and **None** or by selecting the individual Privacy Info patterns. You can use the Cross icon, X, to clear the search term in the **Search Document** input field along with the search result panel.

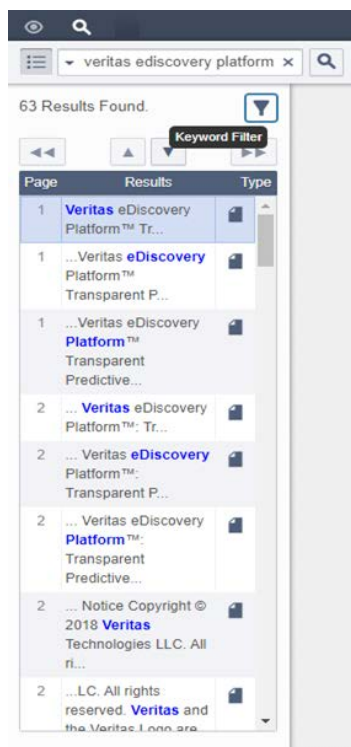


If you select or clear any search term or its highlight color that appeared through Persistent Hit Highlighting feature, the changes will be applicable only on the current document. These changes do not impact the search teams and highlight the color specified in the Processing settings.

If you do not want to highlight the terms or patterns specified under Persistent Hit Highlighting, clear the check boxes for the keyword(s) or pattern(s) under the Search Document list in the native viewer.

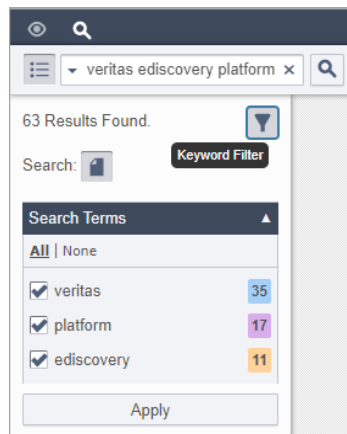


The Up and Down arrows help navigating through the search results. The Right and left arrows directly jump to 251th result back and forth when the result size exceeds beyond 250 results.



Keyword Filter

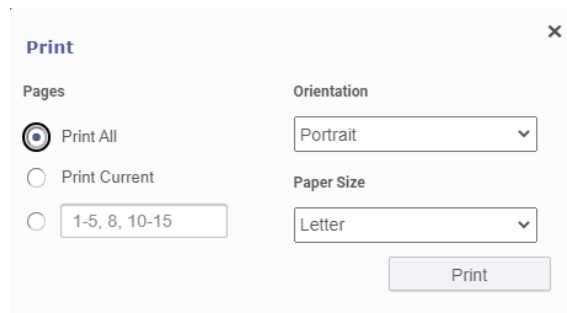
In Keyword Filter pane, you can clear the check boxes of the keywords that you do not want to populate in the search result panel.



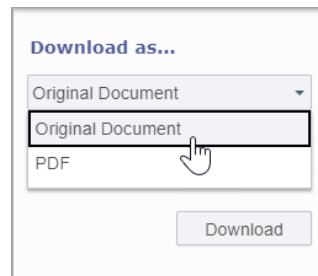
Using Other Tools in Native View



- A. **Keyword Navigation** - It is visible only when a search is formed. It helps in navigation throughout the search hits, both within the item as well as across items.
- B. **Document Navigation** - Document to document navigation shows the document ID and not the Item ID.
- C. **Page Navigation** - Block arrows navigate to the first and last page directly, and single arrow navigates sequentially.
- D. **Print** - Prints a page in custom format. When printing, typical print options, such as print range, orientation, and paper size are available.



- E. **Download** - Downloads a file in original as well as PDF format.



- F. **Select Text** - Helps to select text in the displayed page.
- G. **Pan Tool** - Helps to move or pan the page.
- H. **Zoom Out/In** - Helps to zoom in or zoom out the page.
- I. **Fit Content** - Helps to fit content to full size.

- J. **Fullscreen** - Shows the page in a full screen mode. To return to the previous mode, click the same Fullscreen button to exit.

Annotation and Redaction View

Annotating Items

You can add annotations to documents to further explain, analyze or illustrate a certain point, or encourage collaboration and communication among a reviewing team. The various editing tools are useful for calling reviewers attention to certain parts of the document. For example, you may want to give a reason for a particular markup to help speed the review or comply with organizational guidelines and regulatory mandates. Or perhaps you need to mark a document for later action such as "Requires Redaction".

Annotations are visible on produced documents. This means that messages, PDFs or MS Office files can be annotated with any of the edit tools.

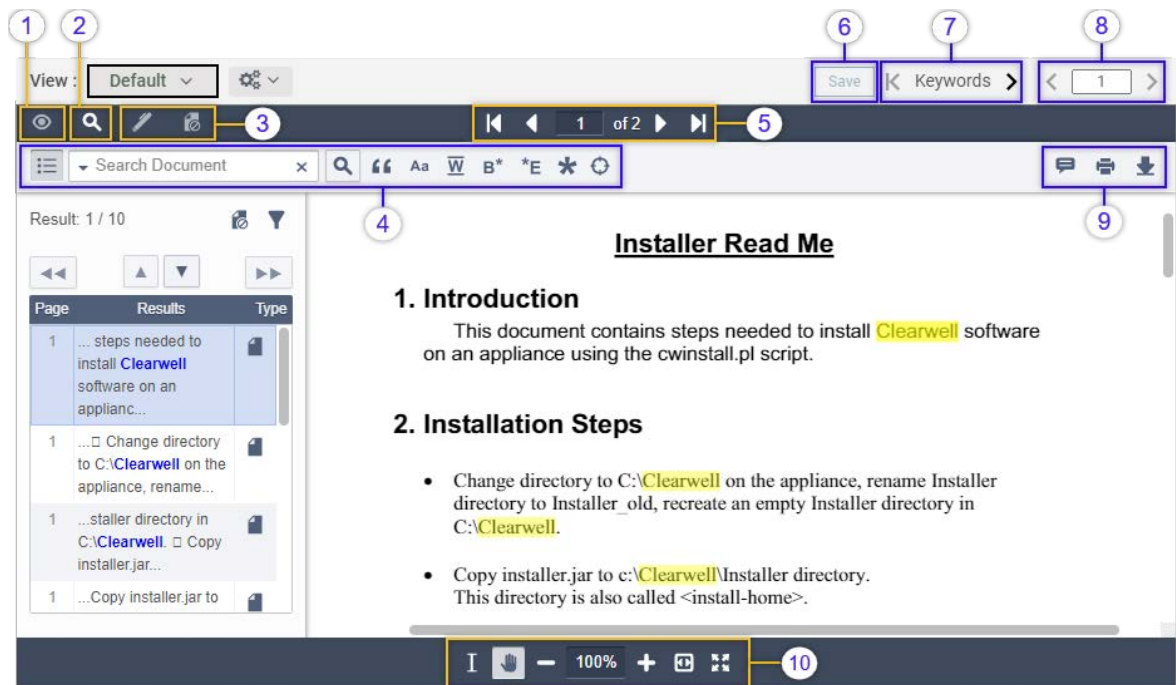
Additionally, all documents that contain annotations are tagged with the **Redacted** default tag to permit searches on the redaction set. There is no separate tag for annotated documents.

Once annotated, the item can be reviewed by another reviewer who can also add annotations. You may want to consider using different colors and other formatting styles to differentiate reviewers.

Guidelines

- After production export, annotated documents are only visible in the Production View within the Native Viewer.
- Be aware that clearing all redactions on a document will also remove all annotations on that document.
- To annotate, you should have access to review mode and privileges to redact/annotate documents.

Understanding the Annotation Interface



- 1. View Tab** - The View tab displays the same options that are listed in *"Viewing Documents in Native View" on page 164*. The only difference is that the thumbnail shows the redacted area with a thumbnail list.
- 2. Search & Redact** - Provides options to search words or phrases. See *"Searching within Documents in Redaction View" on page 184*
- 3. Annotate/Redact Toggle**. Within an item you can switch between operations. The **Redact** mode is the default.
- 4. Tools**. Select the annotation tool. Depending on the annotation tool you select, additional options are made available.
- 5. Page Navigation**. Provides page navigation, such as the first page, the last page, next, and previous page.
- 6. Save Markup**
- 7. Keyword Navigation** - Navigates through the search hits both within the item as well as across items.
- 8. Document Navigation** - Provides document to document navigation.
- 9. Additional Options** - Comments Panel, Print, and Download.
In release 10.0, the Download options, **Include in downloaded Document** check box from the Annotation context menu has been removed. Also, the **Selected** option is removed from the **Redactions** list. The **Redactions** list now include None, Redact, and Transparent options.

10. **Viewer Display and Magnification Options.** Options such as Select Text, Pan Tool, Zoom In/Out, Fit Content, and Full Screen.

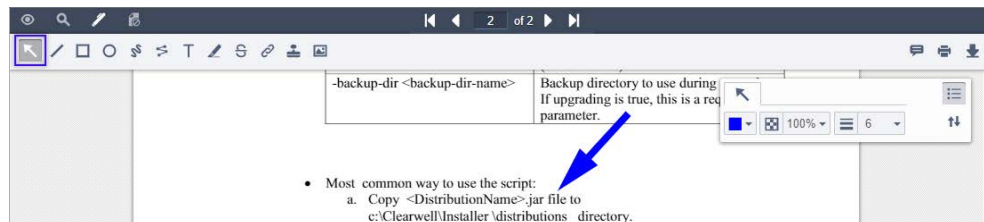
Annotation Editing Tools

Main annotation tools:

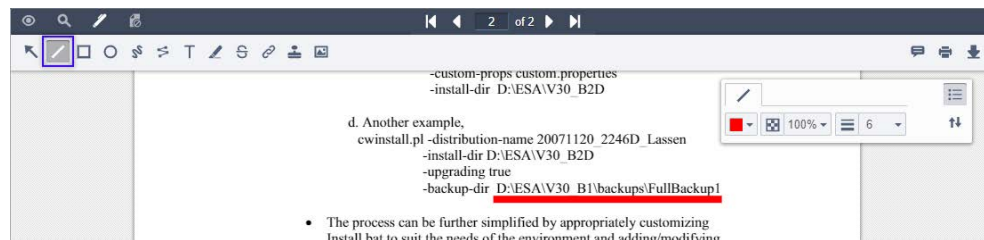


The following annotation tools are available:

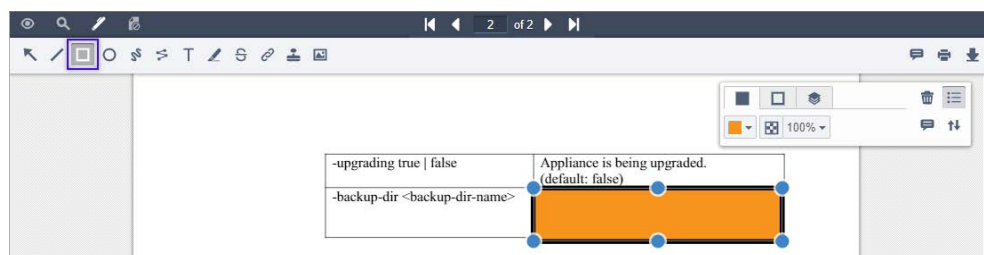
1. **Arrow** - Enables to draw an arrow. You can select color, opacity, and border width.



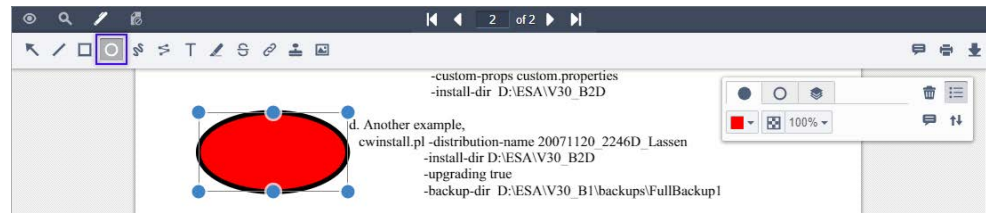
2. **Line** - Enables to draw a line. You can select color, opacity, and border width.



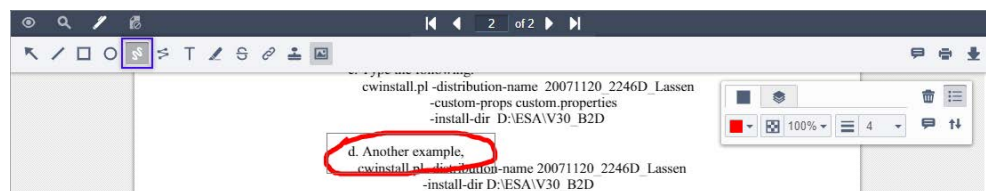
3. **Rectangle** - Enables to draw a rectangle. You can select fill color, opacity, border color, border width, and layer order.



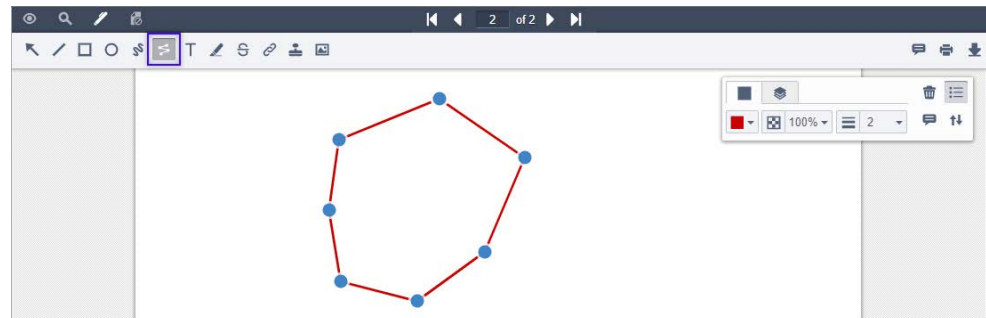
4. **Ellipse** - Enables to draw an ellipse. You can select fill color, opacity, border color, border width, and layer order.



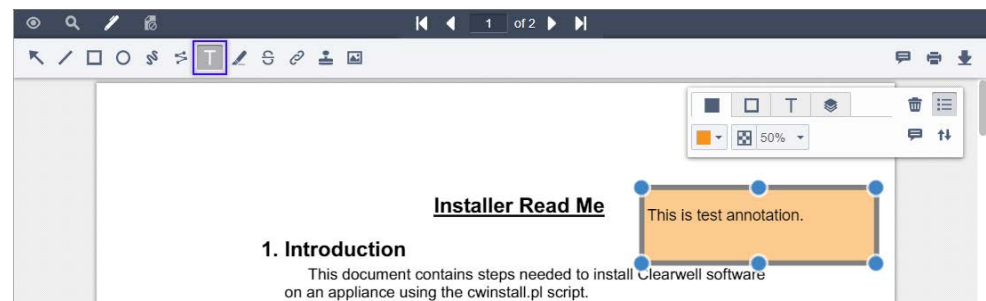
5. **Freehand** - Enables you to apply a freehand annotation. You can select color, opacity, and border width.



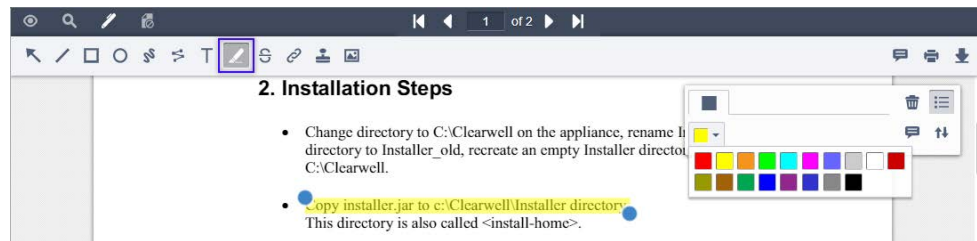
6. **Polyline** - Enable to draw a custom polygon. You can select fill color, opacity, border width, and layer order.



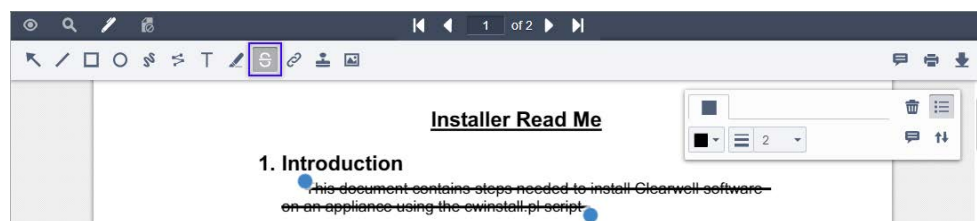
7. **Text** - Enable to write text within an annotation. You can select fill color, opacity, border color, border width, layer order, and several font options.



8. **Highlight**- Enables to highlight the select text highlight annotation.



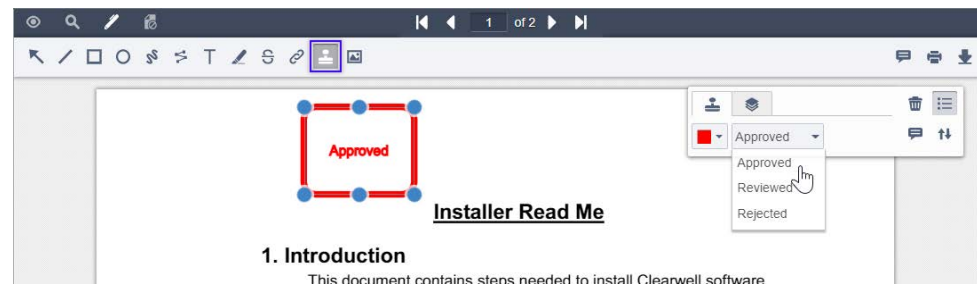
9. **Strikethrough** - Enables to mark text that is mistaken or to be remove. You can select color and border width.



10. **Text Hyperlink** - You can give a custom link to the selected text. To change the hyperlink, you can directly click on the text or make selection using the pan tool and change the link using the context menu.



11. **Stamp** - User can give stamp of Approved, Rejected or Reviewed using this annotation. As of now, user can only apply one of these three stamp annotations. Any other customized text is not possible.

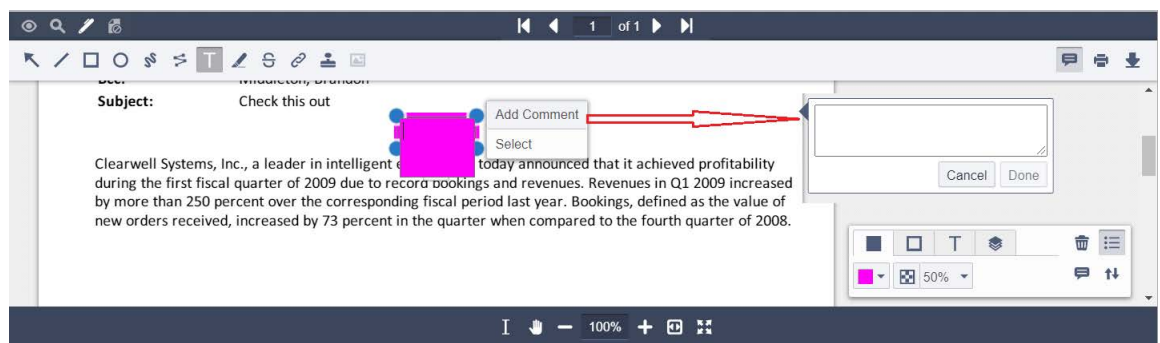


12. **Image Stamp** - You can apply any of the two pre-existing image stamps, cross or tick mark, on the document.



To annotate an item

1. Select **Review mode** from the Search menu. Choose **Redaction/Annotation** from the **View:** and select the redaction set that you want to annotate.
2. Click **Annotate** from the top left to toggle from the default **Redact** mode display.
3. Select any of the annotation tools from the left pane, and then select the additional annotation tools from the extended tools box.
4. Apply annotation.
A quick actions menu automatically shows up as soon an annotation is applied. Right-click on an annotation also brings up the menu.
Click **Add Comment** to add comments for the annotation.
When you hover over the annotation, the details such as author name and time of annotation are displayed.



5. Annotations are automatically saved when auto-save is enabled. If prompted, save the annotations.

Redacting Items

By definition, redaction means the removal of certain types of information from items or documents. Redaction is useful for protecting information, especially when there is data containing sensitive information that must not be shared (non-discoverable, proprietary) or must be deleted to comply with regulatory mandates.

The redaction feature allows you to select specific portions of an item to be concealed when the item is produced. You can use redaction to protect sources or limit information on a need-to-know basis.

You can consider redacting in a full screen view to see more of the document. Tag and Related Items panel are available in the full screen mode.

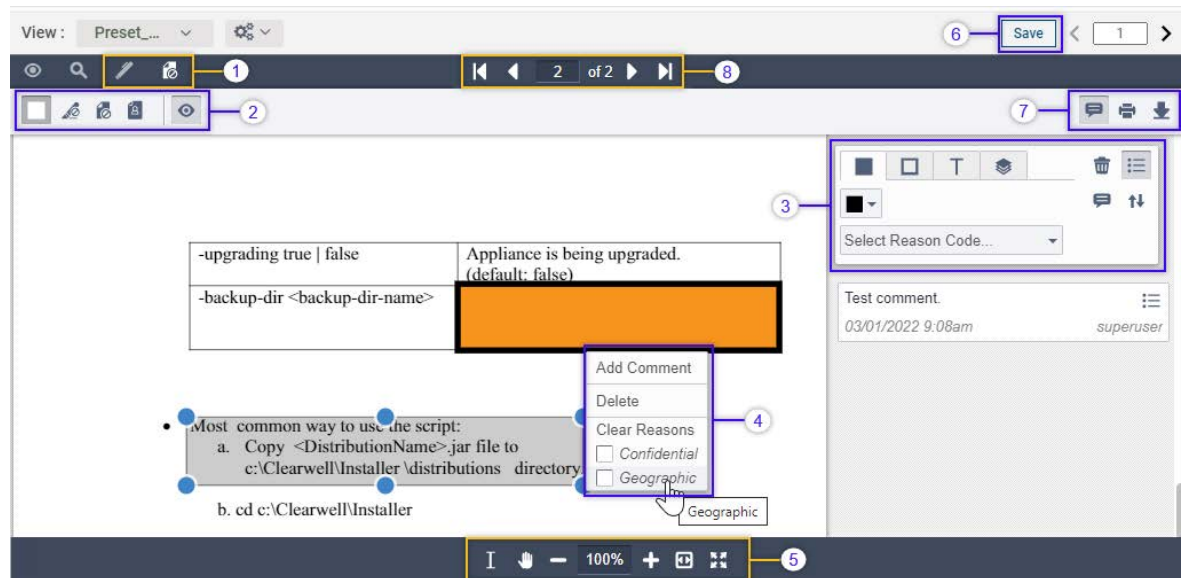
The information in this section applies if you have licensed the Review, Redaction, and Production module.

Consider the following changes that release 10.0 brings in:

- If you apply the reason code before applying any redaction, then the applied reason code will become the default and persists across the session (in item to item navigation).
- When you apply redaction, the reason code will be automatically applied to redaction.
- If you change the redaction reason by selecting the redacted area, the reason code will be applied to the selected redaction but will not persist across the session.
- Other applied redactions will get the default reason code.
- If you want to change the default reason code, click somewhere on the page or Redact Area icon and change the reason code, then the newly selected reason code will become the default.
- If you don't select any reason code, then it will take blank reason code as default.
- This will apply to both Redaction Area and Text Redaction.
- In the same way, you can make fill color, border color, border thickness, and font color as default for Redact Area only.
- For Annotation, the default behavior is limited for the document only. Once you navigate to other documents, all values are reset to original.
- If a substring of an already redacted phrase or string is re-redacted with a different reason code, then the old reason code is visible over mouse hover, and the newly applied reason codes are not displayed in the PrizmDoc Viewer Redaction View.
- Applying redaction preset reason codes in a document automatically tags the document with the applied reason codes under the corresponding redaction sets so that a user can search a document based on the reason codes applied. If the document is only annotated and not redacted, then it is not tagged with the Redacted tag.
- The reason codes applied through bulk redaction will always take precedence over the reason codes applied through manual redaction on an overlapping text in the PrizmDoc Viewer Redaction View.
- Reason codes applied through area redaction take precedence over the reason codes applied through text redaction or Privacy Info on mouse hover on overlapping phrases or text.

Understanding the Redaction Interface

Redaction Mode provides the tools to redact case items, verify your redactions, and customize how items are displayed. The following diagram illustrates key functionality within Redaction Mode.

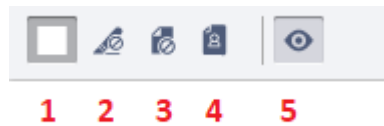


1. **Annotate/Redact Toggle.** Switch between Annotate and Redact tools.
2. **Redaction Tools.** Select the redaction tool type and apply it to the item.
3. **Redaction Tools - extended tools.** Select the additional tools for the selected redaction tool.
4. **Quick Actions:** Quick actions menu automatically shows up as soon a redaction is applied. You can choose one or more redaction reasons or add a comment to the redaction. Right click on a redaction also brings up the menu. The actions available are Add Comment, Select, Delete, and Enter a Reason.
5. **Viewer Display and Magnification Options.** Options such as Select Text, Pan Tool, Zoom In/Out, Fit Content, and Full Screen.
6. **Save Markup**
7. **Additional Options** - Comments Panel, Print, and Download
8. **Navigation Arrows** - Click to jump to the next redacted page

Redaction Tools

You can use the following redaction tools and extended tools that are displayed based on the redaction tool selected to redact the documents.

Note: By default, the redaction view mode uses opaque style. If you want to change the default redaction view mode, contact your administrator.

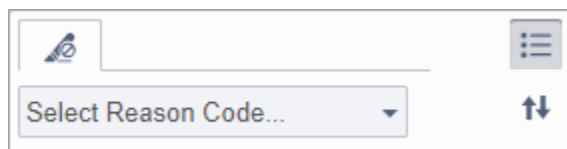


The redactions tools are:

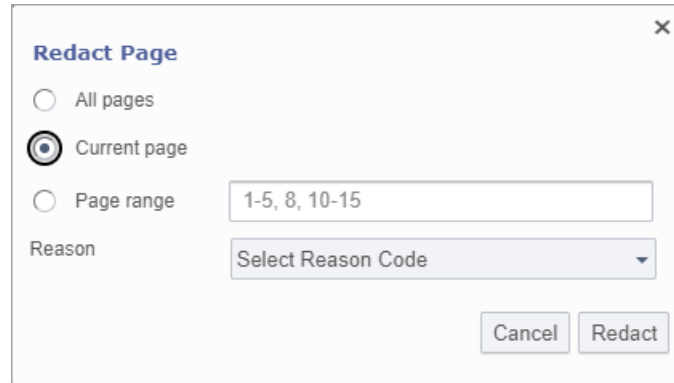
1. **Redact Area** - Redact area enables you to create a redaction on any part of the viewable document. You can draw redaction boxes over any part of a document. Click the Redact Area icon and then hold down your mouse and drag to select an area to redact. Type a reason in the pop-up window, if prompted to do so, and click **OK**. The reason is displayed in the redacted area. When you hover over the redacted area, the details such as author name of the logged-in user and time of redaction are displayed. Redactions in different colors can be done for area redactions.



2. **Redact Text** - You can select text and apply redaction. Only black color is available for text redactions.



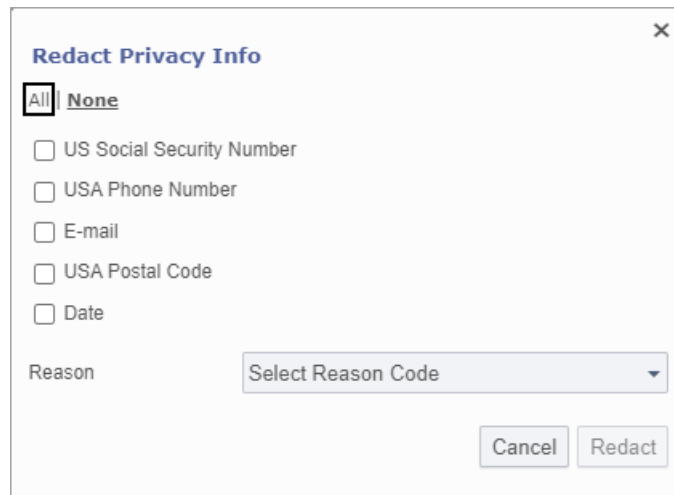
3. **Redact Page** - You can choose to redact the current page or a page range. Choose a redaction reason, and click **Redact**. In production, all pages print with black redaction fields.



The **Redact Page** dialog box contains the following elements:

- Redact Page** title bar with a close button (X).
- Three radio buttons for selection:
 - ☐ All pages
 - ☒ Current page
 - ☐ Page range
- A text input field containing "1-5, 8, 10-15" next to the "Page range" radio button.
- A "Reason" label and a dropdown menu showing "Select Reason Code".
- "Cancel" and "Redact" buttons at the bottom right.

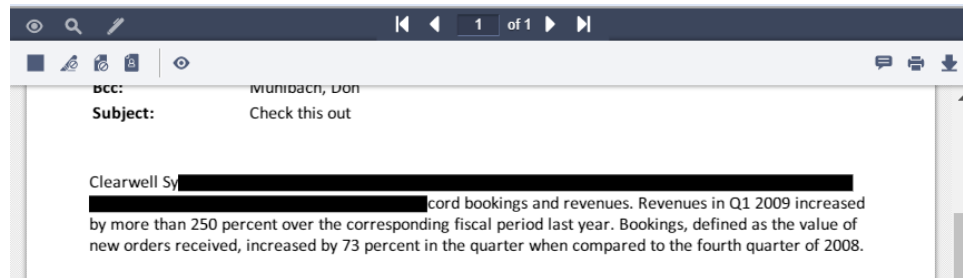
4. **Redact Privacy Info** - You can quickly find and automatically redact sensitive information commonly found in documents and forms including Social Security numbers, phone numbers, email addresses, dates of birth, and names. See ["Redact Privacy Information" on page 186](#).



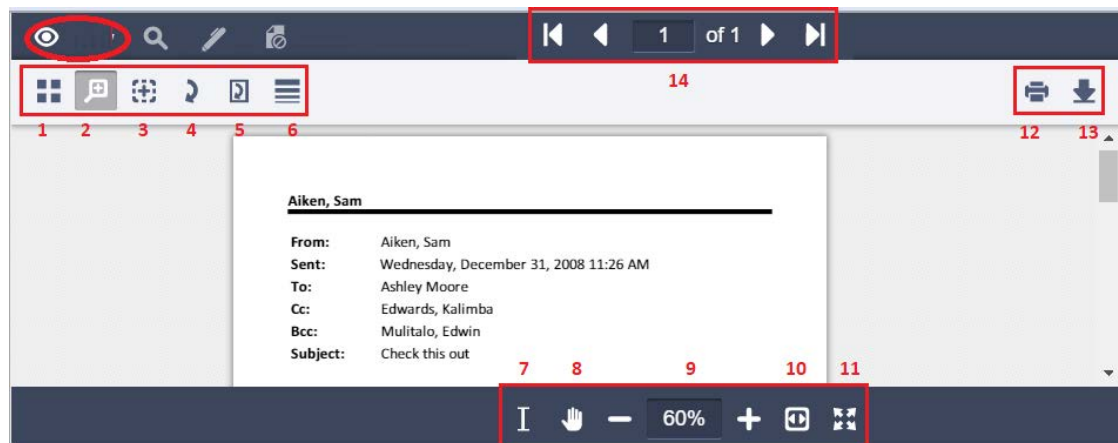
The **Redact Privacy Info** dialog box contains the following elements:

- Redact Privacy Info** title bar with a close button (X).
- Two tabs: **All** (selected) and **None**.
- A list of checkboxes for privacy information types:
 - ☐ US Social Security Number
 - ☐ USA Phone Number
 - ☐ E-mail
 - ☐ USA Postal Code
 - ☐ Date
- A "Reason" label and a dropdown menu showing "Select Reason Code".
- "Cancel" and "Redact" buttons at the bottom right.

5. **Redaction View Mode** - Redaction View mode allows to make redacted area translucent or opaque. By default, the redacted area/text will be displayed in translucent mode. If you want the default redaction view mode to be opaque, please contact your case administrator.



Redaction Display Options



When you click **View**, the viewing tools are displayed.

1. **Thumbnails** - Opens the Thumbnails panel.
2. **Magnifier Tool** - Click and then click an area of the document to zoom in or that section.
3. **Rectangle Zoom** - Click and then use your mouse to select an area. A zoomed version of the area is displayed. To return to the original size, using the page percent controls.
4. **Rotate Document** - Rotate the document 90 degrees clockwise.
5. **Rotate Page** - Rotate the page 90 degrees clockwise.
6. **Image Tools** - Options available are Sharpening, Gamma, and Line Width.
7. **Select Text** - Click and then use your mouse to select text. When a text is selected using the text selection tool, A quick access menu is displayed that provides additional options such as Copy, Highlight, Redact, Link, and Strikethrough the text. Selecting Redact from the

quick menu displays other menu options depending on the selection. On selection of Redact, the below options to Add comment, Select the applied redaction, Delete the redaction or Apply redaction reason are made available.



8. **Pan Tool** - Click to move or pan the page. Select redaction and annotation and perform actions such as deleting or changing redaction reason.
9. **Zoom In/Out** - Change the zoom level.
10. **Fit Content** - Click to display the whole page.
11. **Full Screen** - Click to view in full screen mode. To return to the previous mode, click the same Fullscreen button to exit.
12. **Print** - Click to print the document with the specified redactions.
13. **Download** - Click to download the redacted document.
14. **Navigation** - Navigate to the first page, previous page, next page, or the last page.

To redact an item in Redaction Mode

1. Log into the appliance and navigate to the case containing items you want to redact.
2. Run a search or select your review folder.
3. On the search results screen, click the **Review Mode** icon.
4. Choose **Redaction** from the **View** menu and select the redaction set.

The Review mode screen reopens to show the redaction controls by default. Clicking **Annotate** switches to the Annotation tools.)

5. Use the *"Redaction Tools" on page 179* to redact the item.
 - Right-click the redacted area to see the Quick Actions window or use the Comments Panel.
Right-click on the applied Redaction and Annotation and click **Add Comment** to add your comments. Choose to add a new comment and reply to other's comment.
 - Add one or multiple reason codes in case of Preset Reason Codes or add a reason for free text reason code.

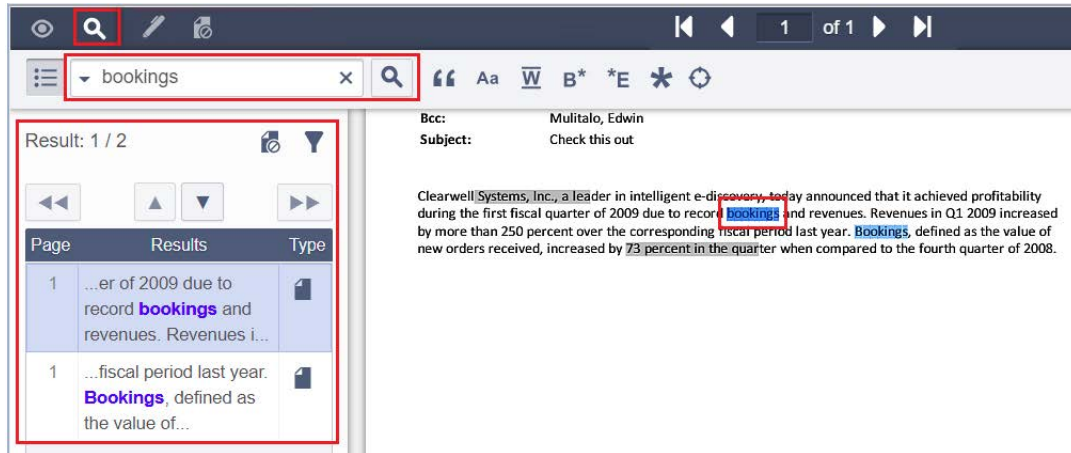
Note: Do not use CJK characters while adding a reason.

6. Redactions are saved automatically if auto-save is enabled. If prompted, save all applied redactions, annotations and comment for future review.

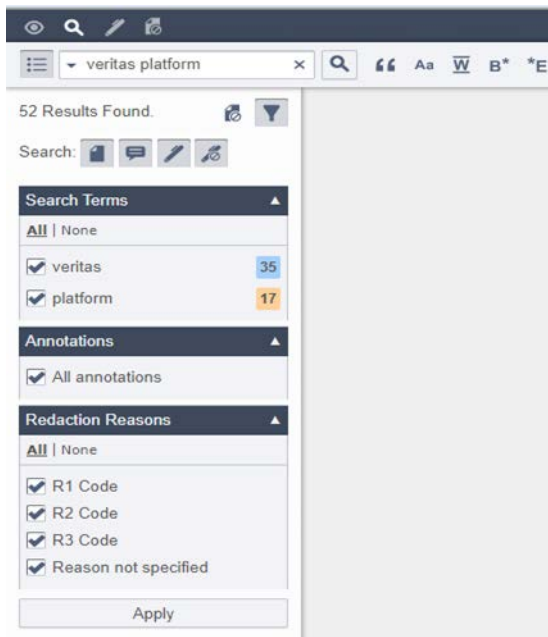
Searching within Documents in Redaction View

The Review and Redaction views support term and phrase searches within an open document making it easy to find and navigate to key terms or sections of a document.

Search and Redact lets you find and mark for redaction multiple instances of a common word or phrase within the Redaction view of an open document. Reason codes and colors can also be applied. Find and Redact can help reduce the time required to redact a document by automatically redacting key phrases or confidential information.



In addition to the features described in [“Searching within documents in Native View” on page 166](#), the Search & Redact tab provides the following additional features:



Search In Options

Icon	Action	More Information
	Search in Document	Search for term within document only
	Search in Comment	Search for term within comment only
	Search Annotations	Search for all Annotation applied in document
	Search Redactions	Search for all redactions with selected preset reason codes in the document

If all of these options are enabled, then all the respective search result will be displayed in the search panel; else, individual search will be displayed in the search panel.

Search Term

Clear the result that you do not want to display in the search result panel. In this case, the Search in Document option will be enabled to search any term.

Annotations

When checked for annotations, all applied annotations will be displayed in the search result.

Redaction Reasons

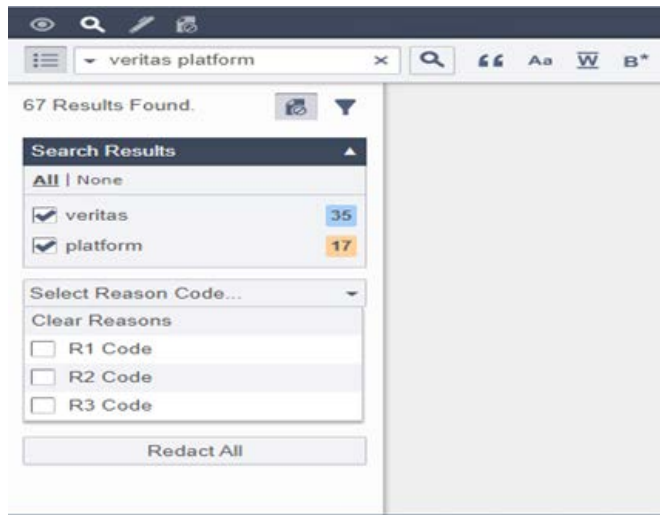
You can search for applied redaction reasons by checking the respective check boxes. If you want to search for all redactions without any reason code, then you can select the “Reason not specified” check box.

You can use the “Search Redaction” feature to verify all redactions applied in the document.

The Search Redactions option searches for redactions, only if it’s a preset redaction set. For free text redaction set, this does not return any applied redactions.

Redact

The Redact icon,  , allows to redact the searched term with respective reason code. You can make selection of the search term you want to redact for Search Results and click on the **Redact all/ Redact Selected** button.



Redact Privacy Information

The Redact Privacy Information tool can be used to quickly find and automatically redact sensitive information commonly found in documents and forms including Social Security numbers, phone numbers, email addresses, dates of birth, and names. This can significantly improve the speed of redaction.

To redact privacy information

Click to open a pop-up window that allows you to modify privacy settings for redaction. The settings that you configure in the pop-up window apply until you modify these settings. Configure the following settings and click **Redact** to apply the settings or click **Cancel** to close the window without applying the settings.

- **Reason**—Depending on how the eDiscovery administrator set up the redaction set, you can either choose preset reason codes for the redaction, or enter a custom reason of your own choice. It is also possible to change or edit a reason code or reason after saving, to override a specific instance of redacted privacy information.
Note: Do not use CJK characters while adding a reason
- **All/None** - Click All to select all of the privacy info options.
- **US Social Security Number** — Select to automatically redact any social security numbers found in the documents. There is also an option to reveal the last four digits of redacted SSNs.
- **USA Phone Number**—Select to automatically redact any phone numbers found in the documents.
- **E-mail**—Select to automatically redact any email addresses. There is also a **Use Exceptions** option.
- **USA Postal Code**— Select to automatically redact USA postal codes.

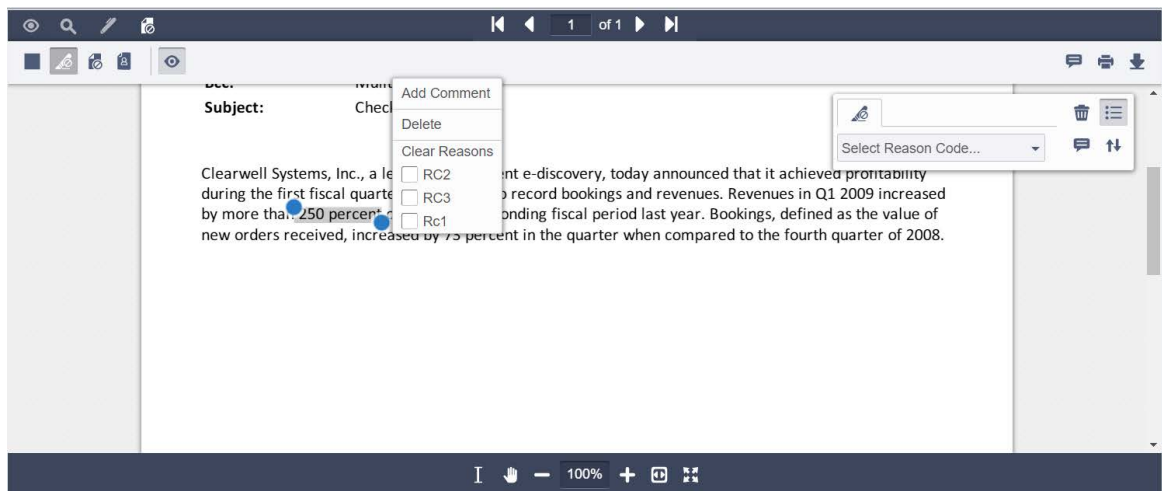
- **Date**—Select to automatically redact any birth dates found in the documents.

Note: By default, the above-listed privacy information patterns are displayed. The system administrator can configure new patterns or edit the existing patterns. Refer to the *System Administration Guide*.

Redact Using Preset Reason Codes

Preset reason codes enable you to consistently choose reason codes across the redaction set. You can apply multiple reason codes.

To apply a preset reason code to redaction



1. Select a document and click the **Review**  icon.
You are now in review mode.
2. Select **Redact Area** or **Redact Text** from the redaction tool set.
3. Mark the text or area you want to redact using the redaction tool set.
4. Either right-click to see the quick action tools or use the required tool from the extended tools.
5. Choose from among the preset reason codes.

Note: If you select one or more reason codes in the extended tools menu and then apply Text or Area redaction, then the selected reason codes are automatically applied for all future redactions. This setting is saved even when you navigate to the next item. To stop the automatic appearance of reason codes, you need to clear the reason codes in this list.

If you select reason codes after applying the redaction, then those reason codes will not be remembered for future redactions.

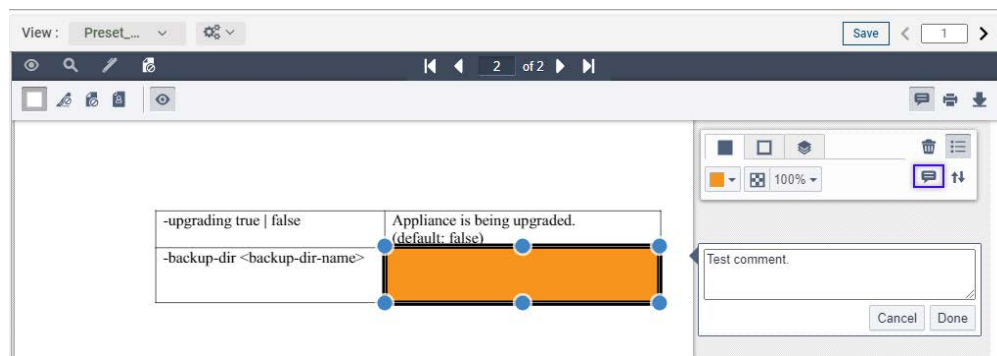
6. Redactions are saved by default. Click **Save Markup** if auto-save has been disabled.

Auto populating the Comments panel in the Redaction/Annotation view

After adding a comment, when you move to the next item, annotations or redaction comments are automatically saved when auto-save is enabled. If prompted, save the annotations and redactions manually.

When you move to the next item or when you open the commented document, the Comments panel appears automatically. This panel appears only if the document has at least one comment. It can be either for Annotation or Redaction.

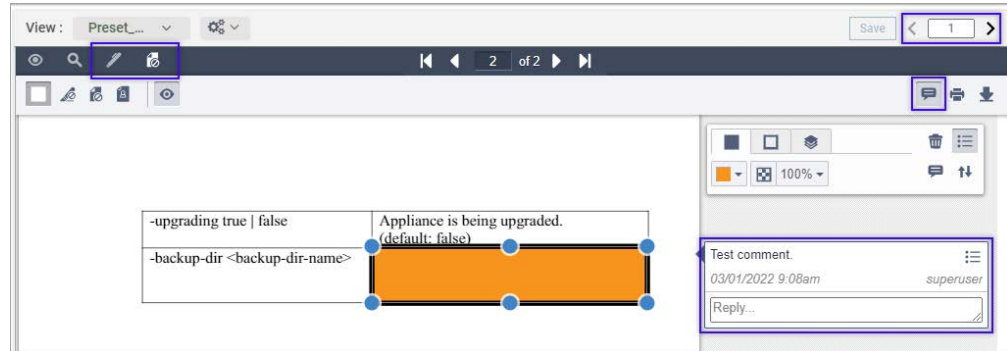
1. Navigate to the case containing items you want to view or review.
2. On the **Analysis & Review** page, search for the document you want to view or review.
3. Select a document and click the corresponding **Review**  icon to open the document in Native Viewer.
4. In the **View:** drop-down list, select **Redactions/Annotations**, and then select the required redaction set.



5. Click **Annotate** or **Redact** to show the annotation or redaction controls.
6. Apply annotation or redaction, and right-click on the applied redaction and add one or multiple reason codes in case of Preset Reason Codes.
7. Click **Add Comment** to add your comments.

Note: After adding a comment, when you move to the next item, annotations or redaction comments are automatically saved when auto-save is enabled. If prompted, save the annotations and redactions manually for future review.

When you move to the next item or when you open the commented document, the **Comments Panel** appears automatically. This panel appears only if the document has at least one comment. It can be either for annotation or redaction.



Managing Redactions

You can manage redactions the following ways.

- [“Saving Redactions” in the next section](#)
- [“Editing Previously Redacted Documents” on page 190](#)
- [“Deleting Redactions” on page 190](#)
- [“Viewing Redaction Details” on page 190](#)
- [“Verifying Redactions” on page 191](#)
- [“Using Redaction Colors” on page 192](#)
- [“Print and Download” on page 193](#)

Saving Redactions

You can save redacted documents three ways:

- **Automatically**
The Auto-save feature saves your redactions when you advance to the next document. Auto-save is enabled by default.
- **When prompted**
If Auto-save is disabled, you are prompted to save your changes when you advance to the next document. Clicking **OK** saves your changes.
- **Manually**
You can click the **Save** icon anytime to save your redactions.

Editing Previously Redacted Documents

If necessary, you can edit another reviewers’ redactions on a document. When you hover over the redaction that you want to edit, the author name, date, and applied reason codes are displayed. Either right-click the redaction to get the quick action tools and edit the redaction details or click the redaction to get the extended redaction tool to change the redaction details.

Deleting Redactions

You can delete redactions one at a time by clicking on the redaction and then clicking the Delete icon in the extended redaction tools. You can delete all the redactions in a document from the **Actions** menu by clicking **Delete redactions/annotations** or using the Delete key on the keyboard.

Viewing Redaction Details

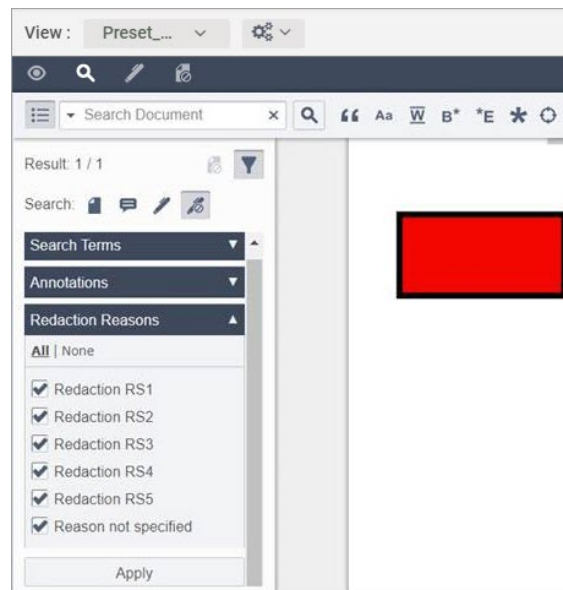
Hovering over a redaction provides information on the user who last created or edited the redaction, the time at which the edit was made and reason code for that redaction. This information makes it easier to perform quality control on redactions.

Verifying Redactions

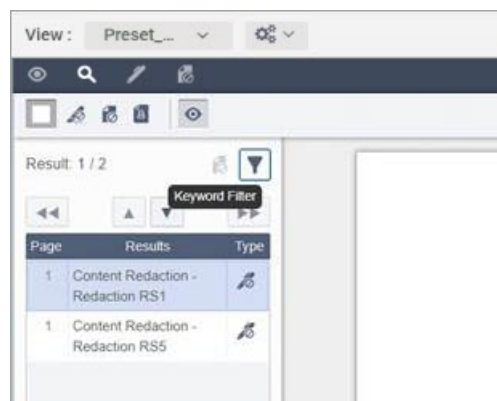
Redaction Verification, available via the Viewer Task Pane, allows you to rapidly navigate through each redaction within a document as part of a QC process. Leveraging reason codes, redaction verification also allows you to check that all redactions have had the appropriate reason assigned.

To verify existing redactions in a document for redaction sets with preset reason codes

1. Click **Search & Redact**  icon.
2. Clear all check boxes under **Search Terms** and **Annotations**, and then select all reason codes under **Redaction Reasons** in the Native Viewer filter panel.
3. Click **Apply**.



4. Navigate through the search results to verify all redactions in the document.



Note: For verifying both redactions and annotations, clear all check boxes under **Search Terms**, and then select all check boxes under **Annotations** and **Redaction Reasons** in the Native Viewer filter panel.

For redaction sets with free text reason codes, you can only verify the redactions with no reason codes using the above mentioned steps. Redactions with free text reason codes cannot be verified.

Using Redaction Colors

You can select the color of your redactions. Using different colors can be valuable for easily distinguishing redactions from a particular reviewer, a reason code or other key criteria. You can use redaction colors only for area redaction, and not for text redaction.

Print and Download

Once redacted, the document can then be printed or produced with these redacted areas burned into the printed or produced image thereby permanently hiding privileged or confidential information.

Print

Print in redaction view allows you to print entire document including either Annotations, Redactions, or both. If redactions are selected to be printed, then you have an option to print redactions in transparent mode by using the Transparent Redactions check box.

You can choose to include or Exclude Comments and Redaction Reasons, or to print at the end of each page, or at the end of document.

The screenshot shows a 'Print' dialog box with the following sections and options:

- Pages:** Three radio button options: 'Print All' (selected), 'Print Current', and a text input field containing '1-5, 8, 10-15'.
- Orientation:** A dropdown menu set to 'Portrait'.
- Paper Size:** A dropdown menu set to 'Letter'.
- Show...:** Three checkboxes: 'Annotations' (checked), 'Redactions' (checked), and 'Transparent Redactions' (unchecked).
- Auto Fit Margins:** A checked checkbox.
- Comments:** A dropdown menu set to 'Do Not Print'.
- Redaction Reasons:** A dropdown menu set to 'Do Not Print', with a mouse cursor hovering over it. The dropdown menu is open, showing three options: 'Do Not Print' (highlighted), 'After Each Page', and 'At End of Document'.
- Buttons:** A 'Print' button at the bottom right and a 'Fewer options' link with an upward arrow at the bottom left.

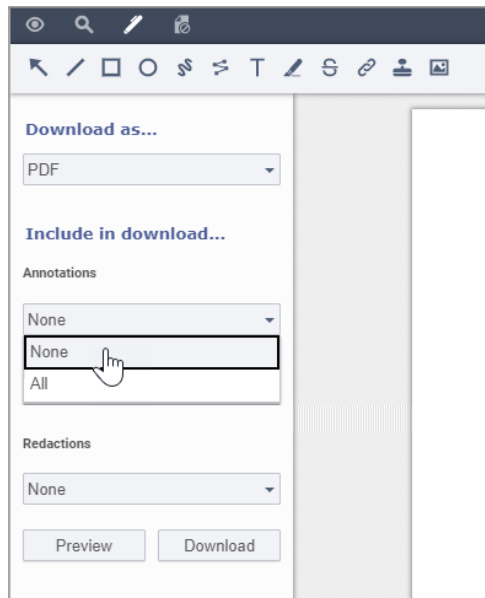
Download

Download in redaction view allows to download document in either original format (native) or PDF format. You can choose to include or exclude annotations and redaction while downloading PDF.

When reviewing loose files or attachments in Redaction view, you can download original document (native) as well as PDF. When reviewing message files, you can download only PDF.

You can also preview the document before downloading by using the **Preview** button. After preview, you can end preview by clicking the **End Preview** button.

Note: Currently, download of any document that contain XFA fields with redactions is not supported. Also, production image export of any document that contain XFA fields with redactions is not supported.



Tracking Redaction Changes

Any time you redact an item or delete an item's redaction, the action and its reason code are tracked in the Tag Event History using a standardized description in the Notes & Comments field.

This standardized event description enables you to quickly search all case items for specific changes. You can search on whether a redaction was added or deleted. You can also specify the reason code provided by the reviewer.

Track redacted items using: Tag Event History

To track redactions with Tag Event History

1. Select **Tag Event History** from the search-type list.
2. In the **Find comments containing any of the words** field, type one of the following search strings.

A. `"redactions added"`

B. `"redactions deleted"`

C. `"reason_code"`

Note: Use quotation marks to ensure relevant results.

3. Click **Search**.

A comprehensive list of items with redaction tags displays.

Bulk Redaction

As the amount of data in review cycles increase and time constraints close in, it can be a challenge to act on redaction requests in a timely manner.

For example, there may be times when you must apply redactions to a large set of items, either across a case and dataset or you need to quickly apply redactions to a single, extremely large document. In both these instances, the bulk redaction feature can greatly increase efficiency, accuracy and eliminate inconsistencies in repetitive redaction tasks.

Bulk redaction provides the ability to redact multiple documents in a Redaction Set without having to individually open and review each and every document in the Native Viewer. You can easily specify the redaction text along with the reason code that needs to be applied on the redacted text to all selected documents. Bulk redaction works on redaction sets with preset reason codes and with free-text reason codes.

Similarly, the delete bulk redaction option makes it easy to delete all redactions and annotations for a set of documents in a redaction set.

Note: Any user that has been given the “**Allow Redacting**” privilege can perform bulk redactions, delete bulk redaction operations and submit jobs.

This section contains:

- [“Considerations and Best Practices” on page 196](#)
- [“Basic Bulk Redaction Workflow” on page 198](#)
- [“Monitoring Bulk Redaction Jobs” on page 202](#)

Considerations and Best Practices

- A good rule of thumb is to cache documents before starting a bulk redaction job. If this step was inadvertently omitted, the bulk redaction job will automatically cache the documents for faster processing.
- Bulk Redaction will not operate on the following:
 - Documents OCR'd and then searched through Veritas eDiscovery Platform.
 - Documents that are hits in an eDiscovery search because search keyword is present in document name and not in the document content.
- Multiple redactions jobs on the same keyword with different reason codes will result in overlapping redactions on the same text. Only the reason code applied in the last redaction job will be used and visible in the final redaction view.
- Applied the wrong reason code? If you have inadvertently applied a reason code for a text and submitted a bulk redaction job, you can use the **Delete Redaction** job to delete all redactions on the submitted files and resubmit the bulk redaction job with correct reason code.
- As with any review workflow, Veritas recommends using a QC process on a sample of the redacted documents to ensure the desired outcome has been achieved.

- Only *new* redactions can be applied through a bulk redaction job. If you want to delete or modify existing redactions in an already redacted document, you must use the Native Viewer.
- Bulk redaction job can only be used to apply redactions. You cannot apply annotations with this method. Annotations are applied through the Native Viewer.
- **Bulk Redaction Job Prerequisite:** Before submitting a bulk redaction job, follow these instructions to filter out unnecessary items from the entire corpus and then folder the remaining search results to a specific folder. You can continue to cull down the data on this folder before submitting the bulk redaction job.

Basic Bulk Redaction Workflow

Bulk redaction on the eDiscovery platform is simple to apply and can easily augment most review workflows.

Step	Action	More Information
Before You Begin...	PREPARE CORPUS DATA Follow these steps to reduce and exclude unnecessary items from bulk redaction data.	See "Bulk Redaction Job Prerequisite: Before submitting a bulk redaction job, follow these instructions to filter out unnecessary items from the entire corpus and then folder the remaining search results to a specific folder. You can continue to cull down the data on this folder before submitting the bulk redaction job." on page 197.
Step 1	IDENTIFY, SEARCH & CULL A typical first operation is to reduce the items to be redacted using search, filter and folder techniques. This may take several iterations to distinguish and cull out your bulk redaction data.	IMPORTANT: While bulk redaction can work on an entire corpus, it is not a recommended practice as it greatly increases the job processing time and may affect system performance.
Step 2	MARK ITEMS With the Redaction Set selected, enter the custom keywords or phrases. that meet your redaction criteria.	Note: You cannot bulk redact Discussion Tab search results.
Step 3	CATEGORIZE & TRACK Enter reason codes to identify redactions.	
Step 4	APPLY REDACTION & START JOB Choose to either redact selected or all items.	
Step 5	MONITOR JOB A background bulk redaction job starts. Progress can be viewed in the job status pane and in the job log.	Bulk Redaction job entries are also recorded in the platform's activity reports. See "Viewing User Activity Reports" in the System Administration Guide.
After You Have Completed Bulk Redaction...	VERIFY BULK REDACTION RESULTS Once the bulk redactions have been applied, you can verify the bulk redactions by reviewing them in the Native Viewer.	

To bulk redact items

Redact

Select Items

☒ Selected Items (3)
 ☐ All Items (3)

Redaction Set

Preset_Redaction_Set_1

Settings

Action

☒ Bulk Redact

☒ Redact Text
 ☒ Redact Privacy Info

☐ Delete all redactions and annotations

Schedule

☐ Set start date/time

Choose a date

Time

Redact Text

Text to Redact *	Reason Code	Redaction Color
the	Geographic	
☐ Find whole word only ☐ Regular expression	☐ Copy Reason Code for all rows	

Redact Privacy Info

Privacy Info *	Reason Code	Redaction Color
USA Phone Number	Confidential	
	☐ Copy Reason Code for all rows	

Cancel

Redact

- From the **Analysis and Review** module, click **Bulk actions menu**  icon > **Redact**
The **Redact** dialog box is displayed.
- Select either **Selected items** or **All items** for redaction.
- Select a **Redaction Set** from the drop-down list.
- In the **Settings** section: Under **Action**, select operation.
In this example, **Bulk Redact** and **Redact Text** are selected which enables the **Redact Text** entry box.
You can select **Redact Privacy Info** that enables the **Redact Privacy Info** entry box.
You can schedule a bulk redaction task to run on a specific date and time or simply start the bulk redaction task by running it on demand.

Note: By default, the text to redact is case-insensitive. If you need it to be case-sensitive, contact your administrator.

5. In the **Redact Text** section:
 - A. In the **Text to Redact** field, type the text you want to redact. You must specify text to redact in at least one row.
 - B. Select the **Regular expression** option to use regular expression instead of plain text for bulk redaction.
For details on how to form regular expressions, see [“ERE Syntax” on page 229](#).
 - C. It is strongly recommended that you keep the option **Find Whole Word only** unchecked if the text is beginning and/or ending with special character such as period (.), comma (,), exclamation mark (!). For other considerations, see [“Bulk Redaction Settings” on page 201](#).
 - D. Enter a reason code in the **Reason Code** field.
Note: Do not use CJK characters while adding a reason
 - E. Select the **Redaction Color**. Black is the default.
 - F. Click the plus sign (+) at the end of the row to add a new line of text to redact with a reason code and redaction color.
In this example, we are looking for the unique term “the” with “Geographic” as the **Reason Code** and black as the **Redaction Color**.
6. In the **Redact Privacy Info** section:
 - A. From the **Privacy Info** list, select one or more pre-configured Privacy Info keywords, such as US Social Security Number, USA Phone Number, E-mail, USA Postal Code, and Date.
Note: By default, the above-listed privacy information patterns are displayed. The system administrator can configure new patterns or edit the existing patterns. Refer to the *System Administration Guide*.
 - B. Enter a reason code in the **Reason Code** field.
 - C. Select the **Redaction Color**. Black is the default.
 - D. Click the plus sign (+) at the end of the row to add a new line of text to redact with a reason code and redaction color.
7. You can monitor the status of redaction jobs through the Jobs window.

To bulk delete redactions

Note: This action deletes all redactions and annotations and cannot be undone.

1. From the **Analysis and Review** module, click **Bulk actions menu**  icon > **Redact**
The **Redact** dialog box is displayed.
2. Select either **Selected items** or **All items** to delete all redactions.
3. Select a **Redaction Set** from the drop-down list.
4. In the **Settings** section, under **Action**, select **Delete all redactions and annotations**.
Starting with release 9.0.2, you can schedule a delete bulk redaction task to run on a specific date and time or simply start the delete bulk redaction task by running it on demand
5. Monitor the status of redaction jobs through the Jobs window.

Bulk Redaction Settings

Field	Description
Redaction Set	Select a redaction set.
Settings	
Action:	
Delete all redactions and annotations	This action will delete all redactions and annotations and cannot be undone.
Bulk Redact	
Redact Text	Enter text (words or phrases) that fits your redaction criteria.
Schedule	
Set start date/time	Starting with release 9.0.2, you can schedule the bulk redaction task and the delete bulk redaction task to run on a specific date and time.
Redact Text	
Text to Redact	Enter your own text for redaction. You can enter multiple texts by selecting a new row with the plus button. Up to 20 individual lines can be added. Each line can have a unique or share the same redaction reason code. The text to redact is treated as case-insensitive. Only check the Find whole word only check box if, for example, you want to redact only whole word occurrences of a particular word (for example, <i>forfeit</i>). Leave Find whole word only unchecked: • If you want to redact a word (for example <i>forfeit</i>) irrespective of whether it is appearing as a whole word or as part of a bigger word like <i>forfeiture</i>. • If you want to redact multiple occurrences of a paragraph in a set of files. • If the text is beginning and/or ending with special character such as period (.), comma (,), exclamation mark (!), question mark (?). • For non-English text.

Bulk Redaction Settings

Field	Description
Reason Code	Enter your own reason code. Check the Copy Reason Code for all rows to propagate the reason code to all rows.
Redaction Color	Select redaction color. The default redaction color is black.

Monitoring Bulk Redaction Jobs

After you have prepared, culled and applied bulk redactions, you are ready to submit the bulk redaction job.

Only one bulk redaction job can run at a time within a case. Other bulk redaction jobs that are submitted for the same case will be queued and processed one-at-a-time.

As with other eDiscovery platform jobs, the jobs viewing pane allows you to view the status and details of a bulk redaction job. Both the status and updates to the job are logged. The status log also contains detailed information including any errors that were encountered.

When the bulk redaction job completes, you can download the bulk redaction report. This report tracks what happened during the processing of the job (statistics and errors). Look for the following items which can aid in identifying the cause of redaction job failures:

- Total number of emails and loose files, attachments, and embeddings submitted
- The number of items that are not redacted
- The count of items with errors.
- Searchable Doc IDs of “**not redacted**” items
- Searchable Doc IDs of the items with errors, the error category and error details

Items which can never be converted to PDF by eDiscovery Platform are termed as uncacheable items. Such items are never submitted for caching; hence they are never redacted as well, and their count is shown under the “Skipped” count. For example: password protected files and executable files such as .exe file.

Bulk redaction job report can be downloaded once the job is completed. It is an Excel file containing three sheets: Job stats, Errors and Skipped, and Not Redacted.

The Errors and Skipped sheet contains the list of all failed and skipped items with details including DocID, FileID, File Size (Bytes), Error Category, and Error Description.

Note: Not Redacted sheet contains the DocID of all the items which were not redacted because of no hits in the document.

Bulk redaction job entries are also recorded in the activity reports. For more information, see ["Viewing User Activity Reports" in the System Administration Guide](#).

Resulting Bulk Redaction Log File Locations

- **Remote job logs on Case Home:** <CW_INSTALL_DIR>\data\esadb\case-logs\<CASE_NAME>\<CASE_NAME>-remotejob@<PORT>.log.

- **Other log files:**

- **Utility Nodes:** <CW_INSTALL_DIR>\logs\server<YYYY-MM-DD>.log
- **Case Home:** <CW_INSTALL_DIR>\logs\component-logs\PrizmDoc

Retrying Bulk Redaction Jobs

In some cases, bulk redaction jobs with errors can be resolved by resubmitting the job. To help identify items that can be resubmitted, for bulk redaction, search and list the items using the Doc IDs.

Here are the types of errors that indicate the job can be retried:

- **CONCURRENT_MODIFICATION_ERROR:** The document being bulk redacted has also been concurrently redacted using Native Viewer.
- **STELLENT_CONVERSION_ERROR**
- **RETRIEVAL_ERROR**
- **DOC_CONVERSION_ERROR**
- **REDACTION_ERROR**

Note: By default, number of retry attempts for bulk redaction jobs is set to 3.

Shortcut Keys for Review in eDiscovery Platform

eDiscovery Platform provides shortcut keys that Windows and Mac users can use while performing various review operations.

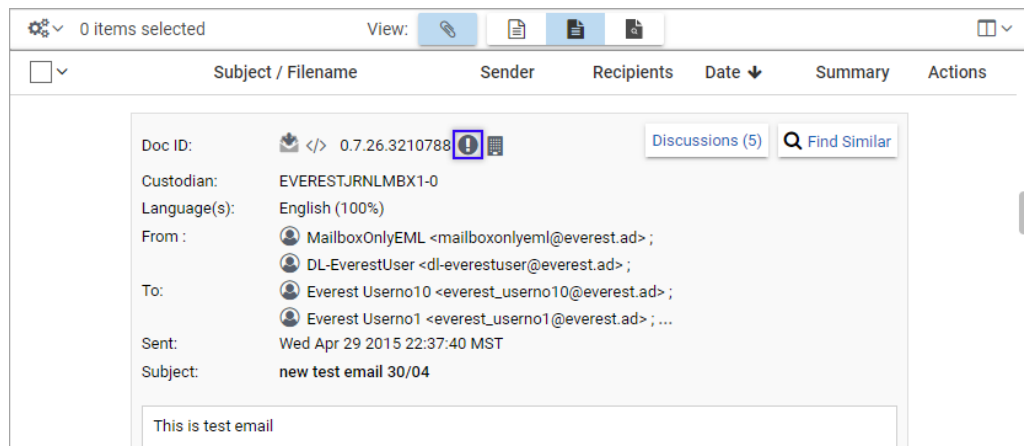
Action	Shortcut Key/s Windows	Shortcut Key/s Mac
Go to Next page	Page Down	Fn + Down Arrow
Go to Previous page	Page Up	Fn + Up Arrow
Go to first page	Home	Fn + Left Arrow
Go to last page	End	Fn + Right Arrow
Zoom in	+	+
Zoom out	-	-
Save the Redaction and Markups	Ctrl + S	Command + S
Delete Redaction and Markups	Delete	Fn + Delete
Arrow Keys for navigate within page	Up, Down, Left, Right	Fn + Left Arrow, Fn + Right Arrow, Fn + Up Arrow, Fn + Down Arrow
Go to Next Document/Item	Alt + N	Option + N
Go to Previous Document/Item	Alt + P	Option + P
Go to Next Keyword Hit	Alt + Down Arrow	Option + Down Arrow
Go to Previous Keyword Hit	Alt + Up Arrow	Option + Up Arrow
Rotate page clockwise	Ctrl + Space	Command + Space
Rotate page anti-clockwise	Ctrl + Shift + Space	Command + Shift + Space
Show thumbnails for current item	Alt + T	Option + T
Search in Native Viewer	Ctrl + F	Command + F
Print document within Native Viewer	Ctrl + P	Command + P
Dismiss overlays like Redact Page, Redact Privacy Info, etc.	Esc	Esc
Fit Width	Alt + W	Option + W
Select Pan Tool	Ctrl + Shift + A	Command + Shift + A
Enter full screen mode and exit	Alt + F	Option + F
Go to View tab	Alt + V	Option + V
Go to Annotation Tab	Alt + A	Option + A
Go to Redact Tab	Alt + R	Option + R
Select the text in document	Alt + I	Option + I
Download document	Ctrl + D	Command + D
View Comment	Ctrl + Shift + C	Command + Shift + C

For a complete list of all shortcuts, refer to the *Keyboard Shortcuts Reference Card*.

Reviewing Journal Envelope Information

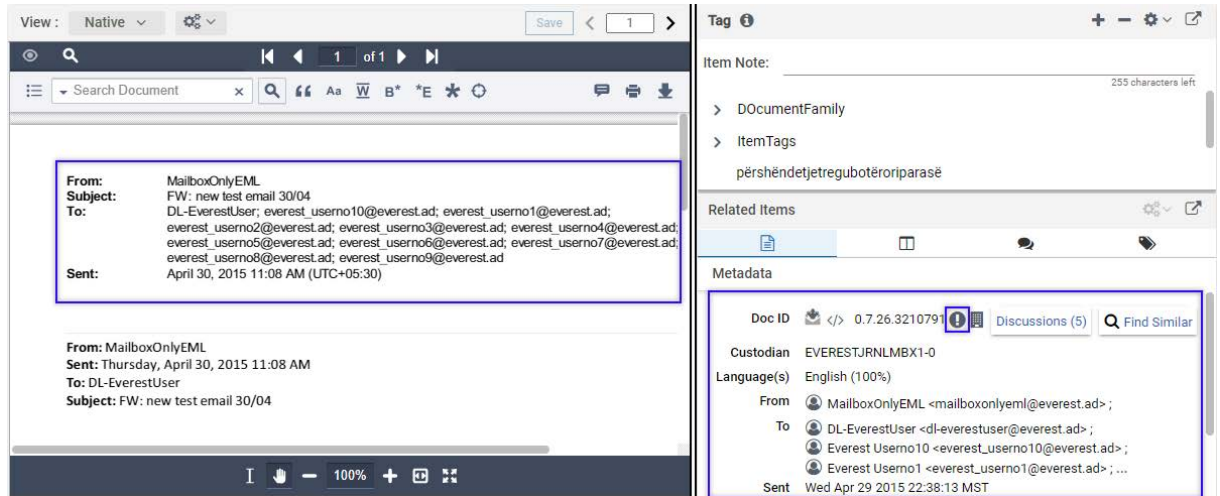
In the Analysis & Review module, click the **Details** link in any Journal message to display expanded Journal information. The expanded Journal information is shown as part of the “To”, “Cc”, “Bcc” before the sent line. It also includes the “To”, “Cc”, and “Bcc” recipients in the child message. The system displays the Distribution List information present in the journaled message and the member who belongs to the Distribution List.

Note: If you are using Exchange 2003, in which all recipients are aggregated in the “Recipients” field, the “Recipients” list is added to the “To” field.



Native view

Clicking the **Review** link in any Journal message shows the item in either text or Native view. (In Review mode as with Search Results, an icon next to the DocID displays the message type as “Journal Message” when hovering over it.) The messages displayed show all Distribution List recipients expanded as individual recipients, as in the following example.



In native view, attachments are linked to the original message (not the parent message with the attachment). The regular “To”, “Cc” fields are merged with the corresponding Journal fields. All fields can be redacted in the **Review > Redact**.

When reviewing journal messages using this feature, the native view of a message may differ from the text view. Native view does not show the Bcc field, so Bcc recipients will not normally be shown. The exception to this is when you are processing journal messages with Basic journal reports. In this case the Bcc recipients will be shown because they will have been merged into the To field as explained above. If you chose to disable journal envelope processing, then Bcc recipient information will never be shown in native view.

Production View

The Production folder is a system-generated, top-level folder, under which you can create subfolders for your individual production. You can specify production settings in the tabbed area in the folder dialog box at any time prior to running the production.

After the production folders are set up, users can use the add, move, and copy-to-folder options in Review mode or the tag window to place documents in the production folder.

You can add documents to a production any time until the production is locked and produced. Once documents are placed in the production folder, you can review the final document in the Production view.

In the Production view, you can view document, print, and download.

Displaying redaction reason codes for fully redacted documents

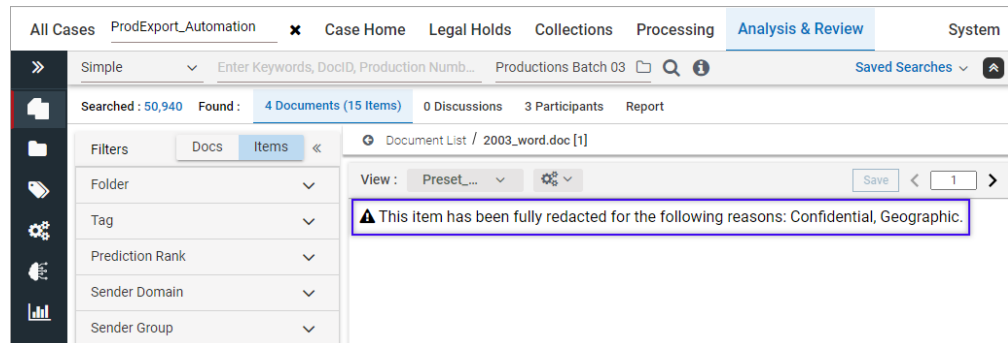
This enhancement impacts Native Viewer and Production Export features in eDiscovery Platform.

Impact on Native Viewer

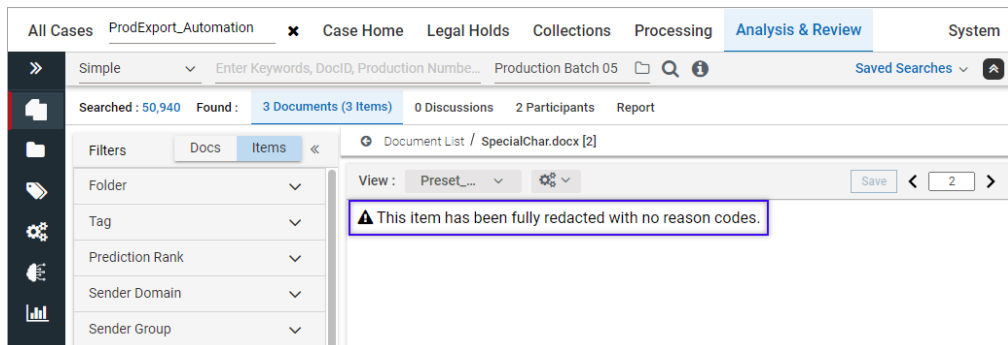
In eDiscovery Platform 10.0 and 10.0.x versions, a user is able to redact the entire document, and apply the **Preset** redaction set reason codes. However, after opening that document in the redaction view of the native viewer, the application displays the text message, for example, "This item has been fully redacted.". The message does not show which redaction reason codes are applied to the document.

Starting eDiscovery Platform 10.1, when a user opens that document, the following types of messages are displayed.

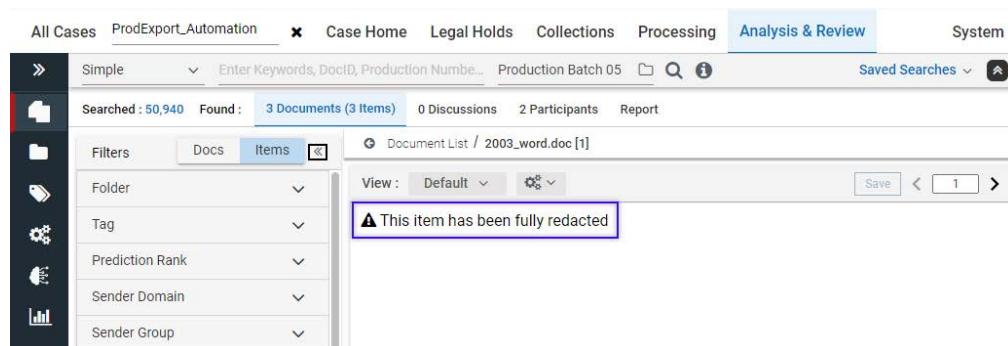
- If the document is fully redacted using preset redaction set reasons “Confidential” & “Geographic”, in the Redaction view of the native viewer, the application displays the text message, for example, “This item has been fully redacted for the following reasons: Confidential, Geographic.”



- If the document is fully redacted without using preset redaction set reasons, in the redaction view of the native viewer, the application displays the text message, for example, "This item has been fully redacted with no reason codes."



- If the document is fully redacted with or without Free Text redaction set reasons, in the redaction view of the native viewer, the application displays the text message, for example, "This item has been fully redacted."



Note: This feature is enabled only for items that are redacted using the Preset redaction sets, and not for items that are redacted using the Free Text redaction sets. If an item is fully redacted using the Free Text redaction set reason code, the message still appears as “This item has been fully redacted.”

Impact on Production Export

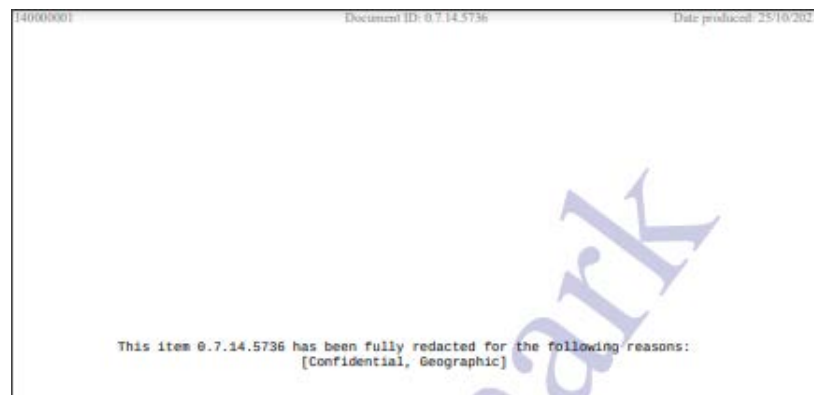
To use the Production Export feature

- Customers need the RRP (Review, Redaction, and Production) license in the Veritas eDiscovery Platform to use the production export feature.
- Users need the System Manager, Group Admin, Case Admin, Case Manager, or eDiscovery Admin role with export or production or both folder privileges and access to the case data intended for export/production.

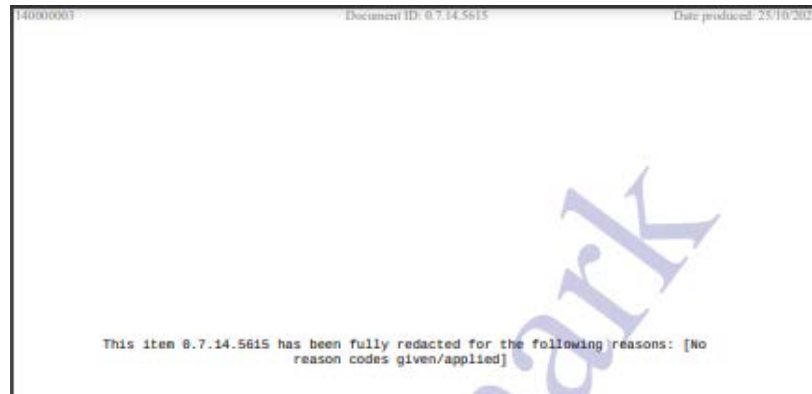
In eDiscovery Platform 10.0 and 10.0.x versions, a user can perform production export on a fully redacted document to which the Preset redaction set reason codes are applied. After opening that document, the message does not show which redaction reason codes are applied to the document. In the redaction view of the native viewer, the application displays the text message, for example, “This document <document ID> is fully redacted.”.

However, in eDiscovery Platform 10.1, when a user opens that document:

- If an item with DocId 0.7.14.5736 is fully redacted using preset redaction set reasons “Confidential” & “Geographic”, then a slip-sheeted message appears in the production exported image (PDF/TIFF) as: “This item 0.7.14.5736 has been fully redacted for the following reasons: [Confidential, Geographic]”



- If an item with DocId 0.7.14.5615 is fully redacted without using preset redaction set reasons, then a slip-sheeted message appears in the production exported image (PDF/TIFF) as: "This item 0.7.14.5615 has been fully redacted for the following reasons: [No reason codes given/applied]"



- If an item with DocId 0.7.14.5615 is fully redacted with or without free text redaction set reasons, then a slip-sheeted message appears in the production exported image (PDF/TIFF) as: "This item 0.7.14.5615 has been fully redacted for the following reasons: [Reason codes not supported for free text redaction set]".



Production Folder user interface

On Production Folder user interface, default Customizable Slip-Sheet Text for fully redacted items is changed to *"This item %DocID has been fully redacted for the following reasons: %RedactionReasons"*.

Edit Production Folder [X]

Lock Unlock [Refresh] [Slipsheet Report]

General Sort Options Numbering Header/Footer Imaging **SlipSheet** Results

Customizable Slip-Sheet Text ⓘ

Variable Codes: %DocID, %FileName, %FileExtension, %BatesStart, %BatesEnd, %RedactionReasons

Fully Redacted: *

This item %DocID has been fully redacted for the following reasons: %RedactionReasons 939 characters left

Imaging Error: *

Image not available for this document, ID: %DocID 975 characters left

For detailed information, refer to the *Setting Up Production Folders* section in the *Case Administration Guide*.

Printing

This chapter describes how to use the printing function.

Export and Production Tasks

If you have been granted administrator-level rights to export and/or produce search results, and generate Privilege/Redaction logs, refer to the *Export and Production Guide*.

Note: To open and print files, the Adobe Acrobat Reader must be installed on your system.

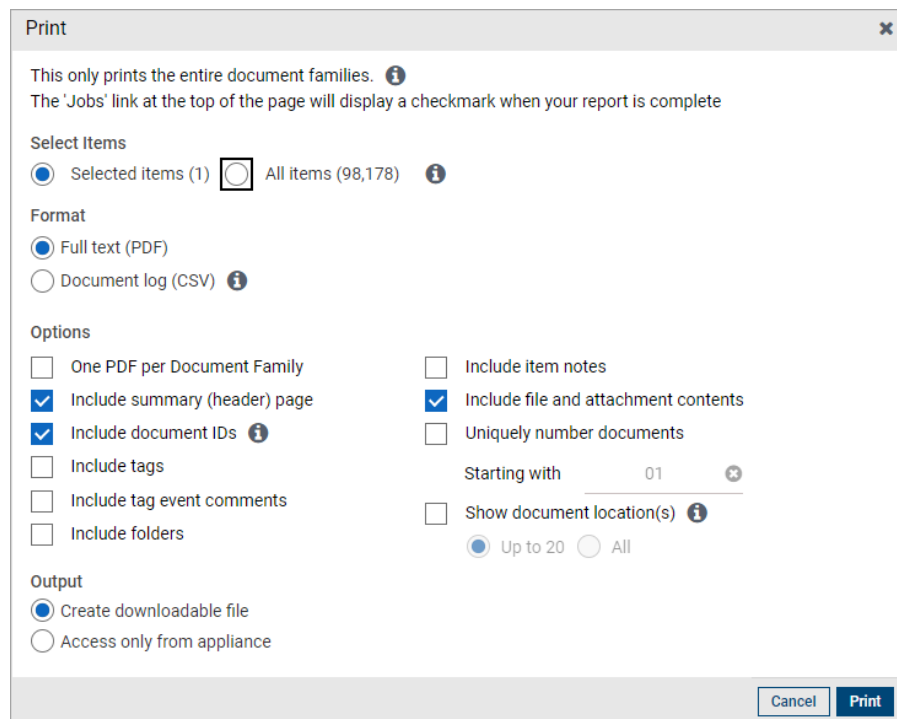
Printing Documents and Logs

On any Search Results screen that displays a list of documents, you can print the documents in your search results to Portable Document Format (PDF) files and download the files to your computer. You can also print document logs.

To print documents

1. Submit a search to find the documents you want to print (see [“Performing Searches” on page 23](#)).
2. Check the box next to the appropriate document or click the check box in the column heading to select all documents on the screen.
3. Click **Bulk actions menu**  icon and then select **Print**.

The printing options are displayed.



The image shows a 'Print' dialog box with the following sections and options:

- Print** (title bar)
- Information: This only prints the entire document families. 
The 'Jobs' link at the top of the page will display a checkmark when your report is complete
- Select Items**
 - ☒ Selected items (1) ☐ All items (98,178) 
- Format**
 - ☒ Full text (PDF)
 - ☐ Document log (CSV) 
- Options**

☐ One PDF per Document Family	☐ Include item notes
☒ Include summary (header) page	☒ Include file and attachment contents
☒ Include document IDs 	☐ Uniquely number documents
☐ Include tags	Starting with 01 
☐ Include tag event comments	☐ Show document location(s) 
☐ Include folders	☒ Up to 20 ☐ All
- Output**
 - ☒ Create downloadable file
 - ☐ Access only from appliance
- Buttons:

4. Specify the following information.

Print Information

Field	Description
Select Items	Select one of the following options: • Selected items—Prints the selected items on the current screen. • All items—Prints all the documents in your search results.
Format	Choose one of the following options: • Full text (PDF)—Export the files in PDF format. The PDF document contains the full content of email messages and loose files (HTML version). When you request the PDF of a discussion thread, two PDF files are generated: – Summary of the discussion – Individual messages in the discussion • Document log (CSV)—Export the document log only, in CSV format. Note: The document log includes only the metadata for a file.
Options	If you selected Full Text (PDF), choose one or more of the following options: • Include summary (header) page—Includes all the message header information. Checked by default. • Include document IDs—Prints the document ID before each document. Later, you can easily locate a specific document by using the document ID in Advanced Search. Checked by default. • Include tags—Prints the most recent tag settings for each folder that each document belongs to. Tags are printed before each document, starting with the most recent tag. • Include tag event comments—Prints the most recent event comments for each folder that each document belongs to. Comments are printed after tags on each document, starting with the most recent general comment (if any) entered without any associated tags. • Include folders—Prints the list of folders in which the selected documents are contained. • Include item notes—Prints item notes entered for the selected set of items • Include file and attachment comments—Prints the content of loose files and email attachments. Checked by default. • Include document IDs—Prints the document ID at the beginning of each item. Using the document ID can help later when performing advanced searches. • Uniquely number documents (starting with)—Prints Document ID: <n> before each document, starting with the number you specify (default is 1). • Show document locations—Includes document locations, either up to 20 or all. Document locations include all places where a given message, mailbox, loose files, or archive was found.

Print Information (Continued)

Field	Description
Output	Select one of the following options: • Create downloadable file—Creates a zip file that you can download by clicking Jobs on the top of the screen. • Access from appliance only—Creates a file. The locations drop-down menu displays the available physical export locations. Select the location and the file will be saved to the target export location. Export locations are determined by access group membership and the type of configured locations associated with an access group. Here are the factors that determine target export locations: If you are <i>not</i> a member of an access group configured for locations: – The export file is written to the case home directory. – If the external location is set, then select the target location from the drop-down location menu. See “Export to an External Drive” in the Export and Production Guide. If you are a member of an Access Group configured for locations: – Use the locations from the drop-down menu to select the target export file. The available locations are based on the access level settings allowed by your access group. To add or modify the list of export locations go to All Cases->Locations. To change the association of access groups to location, go to System > Users > Access Groups. Note: Move your cursor over the information  symbol to view the information needed to identify the file. Your administrator can use the job ID to download the files from the directory <esa_root>\data\filemanager\<username>\jobRun-<jobid>.

5. Click **Print**.

To download the PDF file:

- A. Click **Jobs** at the top of the screen to view the status of the task. A check mark is displayed next to the **Jobs** link to indicate the processing status and when the file is ready. If an error occurs during printing, a warning indicator is shown next to the **Jobs** link.
- B. When the task is complete, click **Download** in the Jobs window to open or save the PDF, CSV, or ZIP file. If a print job fails, you can select **Retry** in the Jobs window.

Note: To delete a completed task, click the trash  icon for the task. To cancel a running task, click **Stop** in the **Actions** column. To close the Jobs window, click **Jobs**.

Using the Review Charts

The Review Charts provide a convenient, at-a-glance summary of case status. Reviewers (with appropriate permissions) and Case Administrators can get live status of document folder and tag status and assignments. (Case Administrators can view the overall progress of a case and reviewer progress.)

[Refer to the following topics:](#)

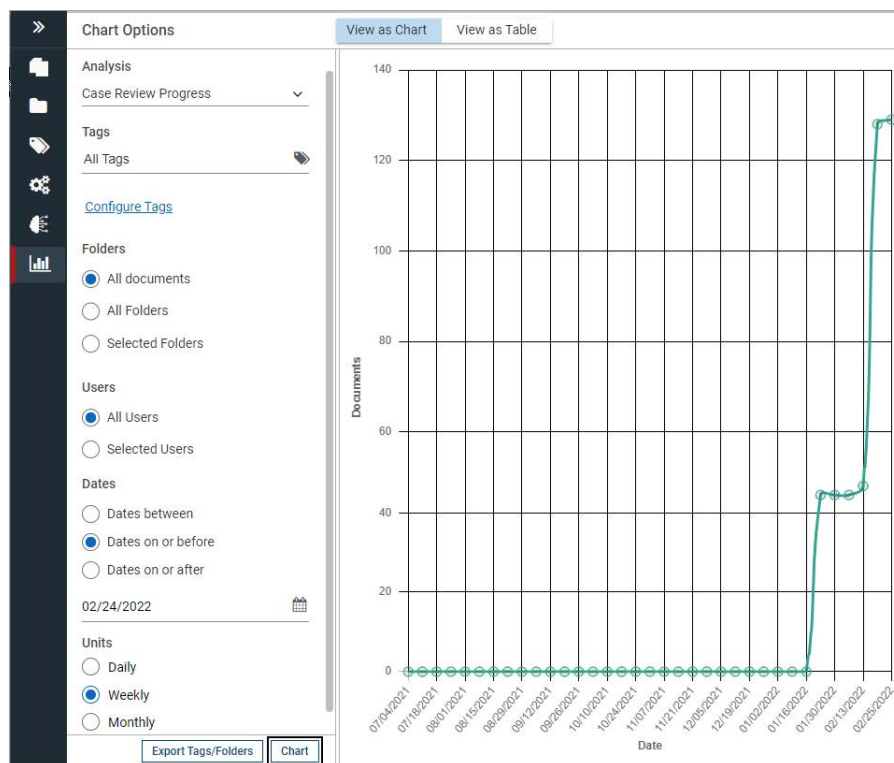
- [“Accessing the Review Charts” in the next section](#)
 - [“View Folder Status” on page 218](#)
 - [“View Tag Status” on page 219](#)
 - [“View Case Review Progress” on page 220](#)
 - [“Export Reports” on page 220](#)

Accessing the Review Charts

All information displayed on the charts is case-specific. Select the case from the drop-down on the navigation bar to view statistics for that case.

To access the Review Charts

1. In the **Analysis & Review**, on the left navigation bar, click the Charts  icon.



Note: A dashboard opens showing the Chart Options menu on the left and the generated Chart (or Table) view on the right.

2. Select the report you want to view.

By default, the information displays in chart form.

3. To display dashboard information in table form, click **View as Table**.

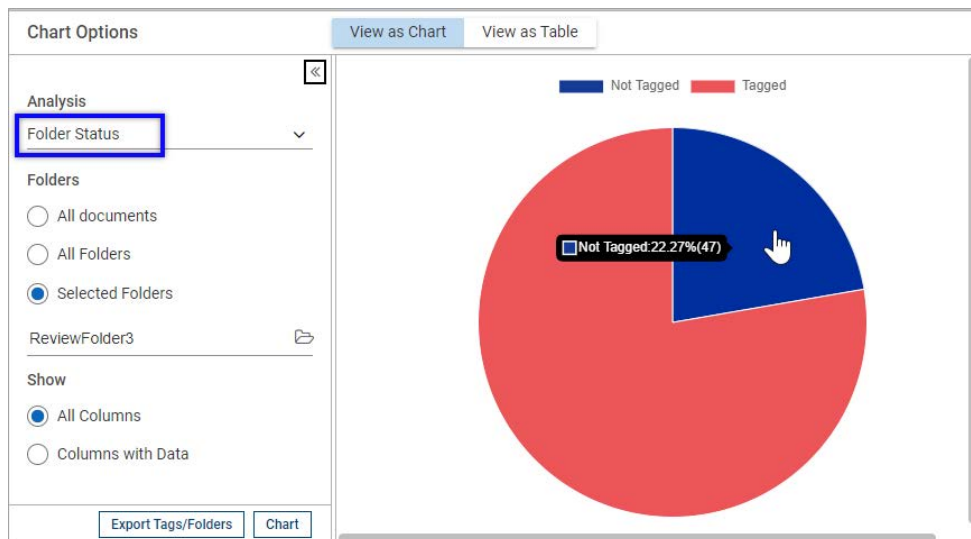
Note: From the **View as Table** tab, you can export reports in CSV or XLS format.

4. To search for the documents represented by a pie segment, a bar chart segment, or a number listed in the **View as Table** tab, click on the segment area or number.

View Folder Status

To view the number of tagged or untagged documents within a folder, use the folder status report.

You can also use the Folder Status Report as a way to resume your review of a specific review set folder. To do this, run the report and click the Not Tagged chart segment to search for the remaining untagged documents.



Before you begin: You must have the permission “Allow analysis tags dashboard access”.

To view Folder Status Reports

1. In the Analysis section of Chart Options menu, select **Folder Status**.
2. In the Folders section, select all documents, all folders, or a specific folder.

The “All documents” option displays a pie chart. Charts displaying multiple folders, display bar charts.

3. Select whether you want unused columns to display in the chart.
4. Click **Chart**.

A chart appears showing the numbers of documents that are assigned to folders, not assigned to folders, tagged, and not tagged.

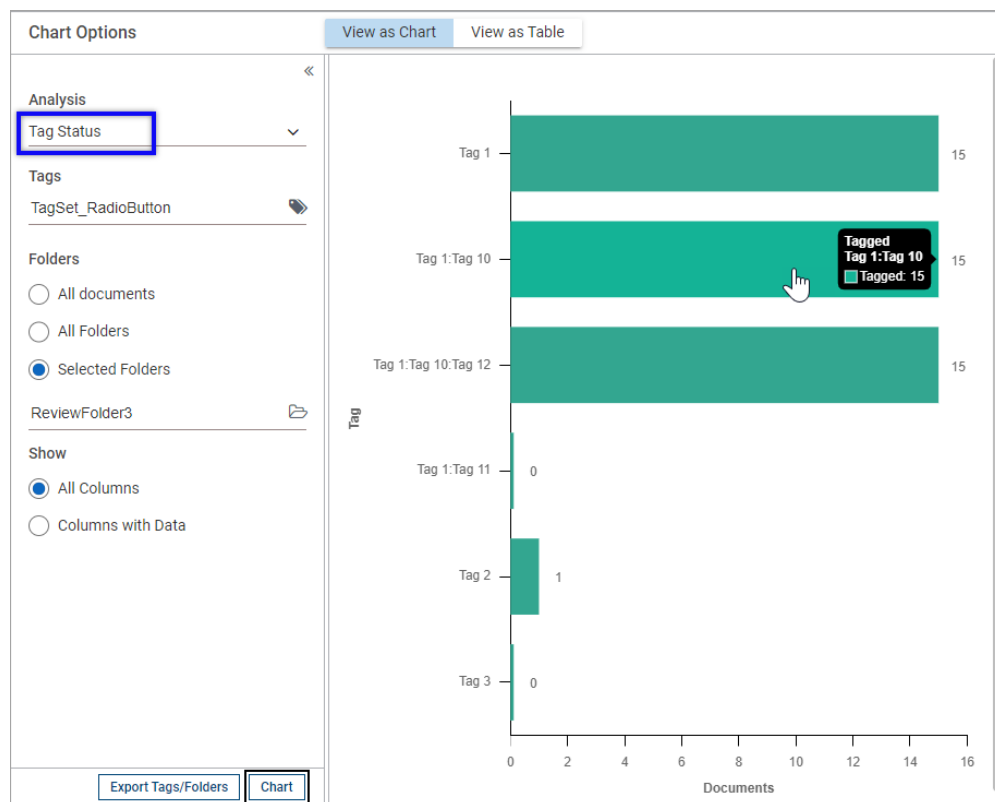
- To view the displayed information in table form, click **View as Table**.
- To export this report, or data from all reports, see [“Export Reports” on page 220](#).

View Tag Status

Before you begin: You must have the permission, “Allow analysis tags dashboard access,” to view Folder Status reports.

To view the status of one or more tags

- In the Analysis section of Chart Options menu, select **Tag Status**.
- From the Folders menu, select all documents, all folders, or a specific folder.



- From the Tags menu, select all tags or a specific tag set.
 - Select whether you want unused columns to display in the chart.
 - Click **Chart**.
- A bar chart displays the number of documents marked with each tag.
- To view the displayed information in table form, click **View as Table**.
 - To export this report, or data from all reports, see [“Export Reports” on page 220](#).

View Case Review Progress

Before you begin: You must have the permission, “Allow analysis tags dashboard access”, to view Case Review Progress reports.

To view case review progress

1. Select the case from the drop-down list on the navigation bar.
2. In the **Analysis & Review**, on the left navigation bar, click the Charts  icon.
3. In the Analysis section of Chart Options menu, select **Case Review Progress**.
4. From the Folders menu, select all documents, all folders, or a specific folder.
5. From the Tags menu, select all tags or a specific tag set.
6. You may want to schedule case report statistics and include tagging activity, click the link **Configure Tags** to open the **Case Reports** menu under **Case Home** tab.
7. From the Users menu, select all users, selected users.
8. From the Dates menu, select dates between, dates on or before, or dates on or after. To select the dates, click the drop-down button to select a date from the calendar.
9. From the Units menu, select daily, weekly or monthly.
10. Click **Chart**.
A bar chart displays the number of documents marked with each tag.
11. To view the displayed information in table form, click **View as Table**.
12. To export this report, or data from all reports, see [“Export Reports” on page 220](#)

Export Reports

To export reports to a CSV or Excel (XLS) file

1. Click **View as Table** to display the report you want to export in table format.
2. Export the report.
 - To export a single report,
 - A. Click the **Export** drop-down list.
 - B. Select either **Export as CSV** or **Export as XLS**.
 - C. **Open** or **Save** the file.

Note: To export the data from all of the reports into a single CSV file, click **Export Tags/Folders**. Then **Open** or **Save** the file.

Appendix A: Legacy and Current Tagging Behavior & Search Results

The following table is a side-by-side comparison of tagging options, system tagging behavior, and how these affect search result sets across the release range of pre-7.1.2, 7.1.2, and 7.1.3.

Breakdown of Tag Searches Across Releases

Pre-7.1.2 Tag Search Option	7.1.2 Tag Search Option	From 7.1.3 On Search Option	Comparison [Same = ✓] [Changed = Δ] [Not Applicable = N/A]	Search Behavior
	Find Items that are not tagged	Find Items that are not tagged	✓	7.1.2 searches will map directly to an equivalent 7.1.3 search with matching counts
Find documents that are not tagged.	Find Messages and Loose files that are not tagged	Find documents where any of the items are not tagged	✓Pre-7.1.2 to 7.1.3 Δ 7.1.2 to 7.1.3	- Pre-7.1.2 searches on upgrade will map directly into an equivalent 7.1.3 search with matching counts. 7.1.2 search results can differ from 7.1.3 search results. This is because 7.1.2. differentiates between attachments, loose files, and embeddings and 7.1.3 treats these categories as items. Use the information provided in the table to formulate your search query to align with the search results you require. - A 7.1.3 search shows the hit indicator on the entire document family as long as the message and loose file does not have a tag OR any of the attachments do not have a tag. A 7.1.3 search can potentially bring back more documents and items compared to the 7.1.2 search.

Breakdown of Tag Searches Across Releases

Pre-7.1.2 Tag Search Option	7.1.2 Tag Search Option	From 7.1.3 On Search Option	Comparison [Same = ✓] [Changed = Δ] [Not Applicable = N/A]	Search Behavior
Find documents with the following tags (Any, All, None)	Find Messages and Loose files with the following tags (Any, All, None)	Find documents that have (Any, All, None)	✓Pre-7.1.2 to 7.1.3 Δ 7.1.2 to 7.1.3	• Pre-7.1.2 searches will map to equivalent 7.1.3 searches preserving match counts. • 7.1.2 search results can differ from 7.1.3 search results. This is because 7.1.2. differentiates between attachments, loose files, and embeddings and 7.1.3 treats these categories as items. Use the information provided in the table to formulate your search query to align with the search results you require. • 7.1.2 searches could potentially be different from the 7.1.3 searches. Though propagation would make the searches mostly consistent. The exception to this behavior is if the user has tagged the message with an item tag and the tag is not propagated. • 7.1.3 will show the hit indicator on the entire document family as long as the message and loose file has a tag or any of the items has the tag.

Breakdown of Tag Searches Across Releases

Pre-7.1.2 Tag Search Option	7.1.2 Tag Search Option	From 7.1.3 On Search Option	Comparison [Same = ✓] [Changed = Δ] [Not Applicable = N/A]	Search Behavior
	Find Email Messages with the following tags (Any, All, None) AND attachments	Find items that have (Any, All, None)	Δ 7.1.2 to 7.1.3	• 7.1.2 search results can differ from 7.1.3 search results. This is because 7.1.2. differentiates between attachments, loose files, and embeddings and 7.1.3 treats these categories as items. Use the information provided in the table to formulate your search query to align with the search results you require. • 7.1.2 will bring back any emails that match the tags and include any attachments that match the tags. • 7.1.3 will bring back any item that matches the tags. 7.1.3 can bring back different results since the item is an attachment, email, embedding, or loose file vs 7.1.2 that only checks against email and attachments.

Breakdown of Tag Searches Across Releases

Pre-7.1.2 Tag Search Option	7.1.2 Tag Search Option	From 7.1.3 On Search Option	Comparison [Same = ✓] [Changed = Δ] [Not Applicable = N/A]	Search Behavior
	Find Attachments with the following tags (Any, All, None)	Find items that have the following tags (Any, All, None)	Δ 7.1.2 to 7.1.3	• 7.1.2 search results can differ from 7.1.3 search results. This is because 7.1.2. differentiates between attachments, loose files, and embeddings and 7.1.3 treats these categories as items. Use the information provided in the table to formulate your search query to align with the search results you require. • 7.1.3 search will potentially bring back more results since the definition of an “item” includes an “Attachment” (a type of item).
	Find Loose Files with the following tags AND embeddings	Find items that have the following tags (Any, All, None)	Δ 7.1.2 to 7.1.3	• 7.1.2 search results can differ from 7.1.3 search results. This is because 7.1.2. differentiates between attachments, loose files, and embeddings and 7.1.3 treats these categories as items. Use the information provided in the table to formulate your search query to align with the search results you require. • 7.1.2 will return any loose files that match the tags and any embeddings that match the tags • 7.1.3 search will potentially bring back more results since the definition of an “item” includes an “Attachment” (a type of item).

Breakdown of Tag Searches Across Releases

Pre-7.1.2 Tag Search Option	7.1.2 Tag Search Option	From 7.1.3 On Search Option	Comparison [Same = ✓] [Changed = Δ] [Not Applicable = N/A]	Search Behavior
	Find embeddings with the following tags (Any, All, None)	Find items that have the following tags (Any, All, None)	Δ 7.1.2 to 7.1.3	7.1.2 search results can differ from 7.1.3 search results. This is because 7.1.2. differentiates between attachments, loose files, and embeddings and 7.1.3 treats these categories as items. Use the information provided in the table to formulate your search query to align with the search results you require. 7.1.3 search will potentially bring back more results since the definition of an “item” includes an “Attachment” (a type of item).
Find Documents with no current item note	Find Items with no current item note	Find items with no current item note	✓Pre-7.1.2 to 7.1.3 Δ 7.1.2 to 7.1.3	- Pre-7.1.2 searches return all documents where the document does not have an note on any of the items in the document family. In 7.1.3, searches will return items with no item note which may bring back a document where one or more of its items has an item note. Note: The behavior is slightly different since the introduction of an item note in 7.1.2. 7.1.2 searches will map directly to an equivalent 7.1.3 search and match counts.

Breakdown of Tag Searches Across Releases

Pre-7.1.2 Tag Search Option	7.1.2 Tag Search Option	From 7.1.3 On Search Option	Comparison [Same = ✓] [Changed = Δ] [Not Applicable = N/A]	Search Behavior
	Find Messages and Loose Files / Email Messages / Attachments / Loose Files / Embeddings with no current item note	Find items with no current item note	Δ 7.1.2 to 7.1.3	7.1.2 search results can differ from 7.1.3 search results. This is because 7.1.2. differentiates between attachments, loose files, and embeddings and 7.1.3 treats these categories as items. Use the information provided in the table to formulate your search query to align with the search results you require.
Find Documents with document notes containing	Find Items with current item note	Find item notes containing	✓	7.1.2 searches will map directly to an equivalent 7.1.3 search with matching counts.
	Find Messages and Loose Files / Email Messages / Attachments / Loose Files / Embeddings with current item note	Find item notes containing	Δ 7.1.2 to 7.1.3	7.1.2 search results can differ from 7.1.3 search results. This is because 7.1.2. differentiates between attachments, loose files, and embeddings and 7.1.3 treats these categories as items. Use the information provided in the table to formulate your search query to align with the search results you require.

Breakdown of Tag Searches Across Releases

Pre-7.1.2 Tag Search Option	7.1.2 Tag Search Option	From 7.1.3 On Search Option	Comparison [Same = ✓] [Changed = Δ] [Not Applicable = N/A]	Search Behavior
New 7.1.3 Searches				
		Find documents where ANY of its items have (ANY, ALL, NONE) of the tags	N/A	This search will return the documents where any one of the items in the document family matches ANY, ALL, or NONE of the tag criteria

Breakdown of Tag Searches Across Releases

Pre-7.1.2 Tag Search Option	7.1.2 Tag Search Option	From 7.1.3 On Search Option	Comparison [Same = ✓] [Changed = Δ] [Not Applicable = N/A]	Search Behavior
		Find documents where ALL of its items have (ANY, ALL, NONE) of the tags	N/A	This search will return the documents where all of the items in the document family matches any, all, or none of the tags.
		Find documents where NONE of its items have (ANY, ALL, NONE) of the tags	N/A	This search will return the documents where ALL of the items in the document family do not have (match) any, all, or none of the tags. Note: The search criteria "Find documents where NONE of its items have NONE of the tags" may seem confusing. It may be helpful to think of it as the same as an ALL / ANY search. (The NONE/NONE negates the search to be the same as find me documents where all of the items match Any of the tags) For example, suppose you want to find documents where NONE of its items have NONE of the tags: Responsive, Privileged (implicit OR). This search will return a match on an email that has: Email – Responsive Tag Attachment – Privileged Tag

Appendix B: Regular Expressions Support

This appendix section describes the POSIX 1003.2 extended RE (ERE) syntax and the basic RE (BRE) syntax for regular expression keywords that can be provided as input for bulk redaction job.

Note: Undocumented regex features might work; however, Veritas do not provide support for them.

Administrators can edit existing Regular Expression patterns or add custom Regular Expression patterns that show up as a dropdown option in the user interface of Search & Redact or Bulk Redaction. For details, see the *Configuring Privacy Info items for Bulk Redaction* section in the *Veritas eDiscovery Platform™ System Administration Guide*.

ERE Syntax

An extended regexp (ERE) is one or more branches, separated by |. An ERE matches anything that matches one or more of the branches. A branch is one or more pieces concatenated. It matches a match for the first piece, followed by a match for the second piece, and so on. A piece is an atom possibly followed by a repeat operator or an expression controlling approximate matching parameters for the atom. An atom is either an ERE enclosed in parenthesis, a bracket expression, a . (period), an assertion, character classes or a literal.

A bracket expression specifies a set of characters by enclosing a nonempty list of items in brackets. Normally anything matching any item in the list is matched. If the list begins with ^ the meaning is negated; any character matching no item in the list is matched.

Table 1

Syntax	Description	Example	Example Description
[xyz]	Matches any one of the enclosed characters.	[abcd]	Matches the "b" in "brisket", and the "c" in "chop".
[x-z]	Matches any one of the full range of characters between those two (both inclusive). if the hyphen appears as the first or last character enclosed in the square brackets it is taken as a literal hyphen to be included in the character set as a normal character.	[0-9]	Matches any decimal digit.
[^x-z]	It matches anything that is not enclosed in the brackets.	[^a-c]	Matches "o" in "bacon" and "h" in "chop".

Table 2

Syntax	Description	Example	Example Description
<code>^</code>	Matches the empty string at the beginning of the string.	<code>^A</code>	Does not match the "A" in "an A", but does match the first "A" in "An A".
<code>\$</code>	Matches the empty string at the end of the string.	<code>t\$</code>	Does not match the "t" in "eater", but does match "t" in "eat".
<code>\b</code>	Matches a word boundary. This is the position where a word character is not followed or preceded by another word-character, such as between a letter and a space. Note that a matched word boundary is not included in the match.	<code>\b</code>	Matches the "m" in "moon".
		<code>oo\b</code>	Does not match the "oo" in "moon", because "oo" is followed by "n" which is a word character.
<code>\B</code>	Matches a non-word boundary. This is a position where the previous and next character are of the same type: Either both must be words, or both must be non-words, for example between two letters or between two spaces. The beginning and end of a string are considered non-words	<code>\Bon</code>	Matches "on" in "at noon"

Table 3

Syntax	Description	Example	Example Description
<code>.</code>	Matches any single character.	<code>.y</code>	Matches "my" and "ay", but not "yes", in "yes make my day".
<code>\d</code>	Matches any digit. Equivalent to <code>[0-9]</code> .	<code>\d{3}</code>	matches all 3-digit numbers.
<code>\D</code>	Matches any character that is not a digit, Equivalent to <code>[^0-9]</code> .	<code>\B</code>	matches "B" in "B2".
<code>\w</code>	Matches any alphanumeric character.	<code>\w</code>	matches "a" in "apple", "5" in "\$5.28", and "3" in "3D".
<code>\W</code>	Matches any character that is not a word character.	<code>\W</code>	matches "%" in "50%".
<code>\s</code>	Matches a single white space character.	<code>\s\w*</code>	matches " bar" in "foo bar".
<code>\S</code>	Matches a single character other than white space.	<code>\S\w*</code>	matches "foo" in "foo bar".

Table 4

Syntax	Description	Example	Example Description
*	An item followed by * matches a sequence of 0 or more matches of the item.	o*	Matches "o" in "bow" and "oo" in "cool".
		bo*	Matches "booo" in "boooed" and "b" in "bird", but nothing in "ghost".
+	An item followed by + matches a sequence of 1 or more matches of the item.	o+	Matches "o" in "bow" and "oo" in "cool".
		bo+	Matches "booo" in "boooed", but nothing in "bird" or "ghost".
?	An item followed by ? matches the item 0 or 1 time. If used immediately after any of the repeat operators *, + or {}, makes the operator non-greedy (matching the minimum number of times), as opposed to the default, which is greedy (matching the maximum number of times).	e?!	Matches "el" in "angle" and "l" in "angle".
		bo?	Matches "bo" in "boooed" and "b" in "bird".
{m, n}	An item followed by {m, n} matches a sequence of m through n (inclusive) matches of the item where m > n.	a{1,3}	Matches nothing in "cndy", the "a" in "candy", "aa" in "caandy", and "aaa" in "caaaaaandy".
{m,}	An atom followed by {m,} matches a sequence of m or more matches of the atom.	a{2,}	Doesn't match the "a" in "candy", but matches "aa" in "caandy" and "aaaaaaa" in "caaaaaaandy".
{m}	An atom followed by {m} matches a sequence of exactly m matches of the atom.	a{2}	Doesn't match the "a" in "candy", but it matches "aa" in "caandy", and "aa" in "caaandy".

Table 5

Syntax	Description
(?i)extended-regex	Makes a case insensitive search for extended-regex pattern.
(?i:extended-regex)	Makes a case insensitive search for extended-regex pattern.

Examples

Credit Card numbers

Validating credit card numbers in documents can be performed using regular expressions. They're just a sequence of 13 to 16 digits, with a few specific digits at the start that identify the card issuer. Regexes for different brands can be formed as following:

- **Visa:** All Visa card numbers start with a 4. New cards have 16 digits and old cards have 13. To form a regex, card number can be divided into three parts: the starting number 4, the 12 digit part and 3 digit number present only for 16 digit card numbers. Hence the regex can be written as: `\b4\d{12}(\d{3})?\b`
- **American Express:** American Express card numbers start with 34 or 37 and have 15 digits. Hence the regex can be written as: `\b3[47]\d{13}\b`

`\b` start word boundary

`3[47]` the number 3 followed a number which can either be 4 or 7 thus ensuring only two possibilities 34 or 37.

`d{13}` 13 digit number

`\b` end word boundary

If you just want to check whether the card number looks valid, without determining the brand, you can combine the above six regexes using alternation operator like shown below:

`(\b4\d{12}(\d{3})?\b)|(\b3[47]\d{13}\b)`

If you're planning to search a large document, a simpler regular expression will speed up the search. Unless the document has usages of 16-digit numbers for other purposes, you'll have few false positives. The regex `\b\d{13,16}\b` will find any sequence of 13 to 16 digits.

United States Code

The United States Code is the codification by subject matter of the general and permanent laws of the United States.

A minimal citation to the United States Code has four main components:

1. the title of the United States Code.

There are 53 titles of the United States Code.³ That means we can represent the first component of a citation with either a one-digit number (e.g., "8") or a two-digit number ("18"). Therefore, first part of regex is `\d{1,2}`

2. "U.S.C. §";

This part can be represented as `U\.S\.C\.s?§\s?`

3. the specific section

This section constitutes of a group of digits followed by letters which are optional. Hence, this part can be represented as `(\d+)(\w+)?\s?`

4. the applicable year enclosed in parentheses (though this is optional).

This part can be represented as `(\(\d{4}\))?`

Hence, the regex for United states code is `\d{1,2}U\.S\.C\.s?§\s?(\d+)(\w+)?\s?(\(\d{4}\))?`

Appendix C: Product Documentation

The table below lists the administrator and end-user documentation that is available for the Veritas eDiscovery Platform product.

Veritas eDiscovery Platform Documentation

Document	Comments
Installation and Configuration	
Installation Guide	Describes prerequisites, and how to perform a full install of the Veritas eDiscovery Platform application
Upgrade Overview Guide	Provides critical upgrade information, by version, useful prior to upgrading an appliance to the current product release
Upgrade Guide	Describes prerequisites and upgrade information for the current customers with a previous version of the software application
Utility Node Guide	For customers using utility nodes, describes how to install and configure appliances as utility nodes for use with an existing software setup
Distributed Architecture Deployment Guide	Provides installation and configuration information for the Review and Processing Scalability feature in a distributed architecture deployment
Getting Started	
Navigation Reference Card	Provides a mapping of review changes from 10.x compared to 9.x, 8.x compared to 7.x and 7.x compared to 6.x
Administrator's QuickStart Guide	Describes basic appliance and case configuration
Reviewer's QuickStart Guide	A reviewer's reference to using the Analysis & Review module
Tagging Reference Card	Describes how tag sets and filter type impact filter counts
User and Administration	
Legal Hold User Guide	Describes how to set up and configure appliance for Legal Holds, and use the Legal Hold module as an administrator
Identification and Collection Guide	Describes how to prepare and collect data for processing, using the Identification and Collection module
Case Administration Guide	Describes case setup, processing, and management, plus pre-processing navigation, tips, and recommendations. Includes processing exceptions reference and associated reports, plus file handling information for multiple languages, and supported file types and file type mapping
System Administration Guide	Includes system backup, restore, and support features, configuration, and anti-virus scanning guidelines for use with Veritas eDiscovery Platform
Load File Import Guide	Describes how to import load file sources into Veritas eDiscovery Platform
User Guide	Describes how to perform searches, analysis, and review, including detailed information and syntax examples for performing advanced searches

Veritas eDiscovery Platform Documentation

Document	Comments
Imaging Tool Upgrade Guide	Release 10.0 replaced the IGC Native Viewer with PrizmDoc Viewer. This guide provides details about the Imaging Tool Upgrade feature and how to perform Imaging Tool Upgrade for cases that were backed-up pre-10.0 and are restored in the current version of eDiscovery Platform, workflows affected when the cases are upgraded or not upgraded, and frequently asked questions (FAQs).
Export and Production Guide	Describes how to use and produce exports, productions, and logs (privilege and redaction logs)
Audio Search Guide	Describes how to use the Audio Search feature to process, analyze, search and export search media content
Reference and Support	
Audio Processing	A quick reference card for processing multimedia sources
Audio Search	A quick reference card for performing multimedia search tasks
Legal Hold	A quick reference card of how to create and manage holds and notifications
Collection	A quick reference card of how to collect data
OnSite Collection	A quick reference for performing OnSite collection tasks
Review and Redaction	Reviewer's reference card of all redaction functions
Keyboard Shortcuts	A quick reference card listing all supported shortcuts
Production	Administrator's reference card for production exports
User Rights Management	A quick reference card for managing user accounts
Online Help	
Includes all the above documentation (excluding Installation and Configuration) to enable search across all topics. To access this information from within the user interface, click Help .	
Release	
Release Notes	Provides latest updated information specific to the current product release

Glossary Terms

content volume

Determined by the number of documents and the number of bytes (characters) in those documents.

contributors

A person who sent relevant emails during a discussion.

conversation

The messages sent between a pair of individuals during a discussion.

dashboard

At-a-glance summary of document and tag status and assignments.

discussion thread

A sequence of emails (original email, replies, and forwarded emails) on a particular subject.

document

A loose file (the document parent) with its embeddings or an email message (the document parent) with its attachments is a document. Also called a “document family”

expert

A person who sent relevant emails on a particular topic.

filter

Allows users to narrow the search results by selecting specific attributes of the sender.

folder

A method of organizing documents that are relevant to a specific investigation or task. Used to aid collaboration among multiple reviewers.

individuals

Users who have sent or received emails that include a specific topic or search term.

item

An individual file. For example, a loose file (the document parent) with two embeddings is three items. An email message with four attachments is five items.

originator

A person who sent the original email of a discussion.

participant

A person who sent or received emails that include a specific topic.

relevance score

A value (0 to 1) calculated for each document to indicate its relevance to the search criteria.

role

Specifies a set of access permissions that can be assigned to user accounts.

stemmed search

A search that automatically finds documents that contain common variations of a word that is entered as part of a query.

tag categories

Customized identifiers with predefined values that can be used to indicate the review status (or other information) of a document associated with a folder.

tag values

The set of values available for a tag category. For example, the "Assigned To" tag category might have a list of user names. For a given folder, each document can have only one current tag value for each tag category.

terms

The words and phrases associated with a topic.

topic

A subject area identified by a set of associated terms. A document includes a topic if it contains any of the terms associated with the topic. Topics are identified automatically, but an administrator can edit any topic and define new topics.