About Arctera Insight eDiscovery

This section includes the following topics:

- Introducing Arctera Insight eDiscovery
- Insight eDiscovery key features
- Known limitations affecting the Department Reviewer role
- Insight eDiscovery term definitions

Introducing Arctera Insight eDiscovery

This guide describes Arctera Insight eDiscovery and describes how to use all of its key features.

Arctera Insight eDiscovery is a web-based service that enables your company to respond proactively to litigation requests, ensure adherence to company communication policies, and meet regulatory requirements.

Insight eDiscovery provides the tools to search your company's archived items (emails, collaboration messages, and files) to discover those that are pertinent to litigation cases or infringements of corporate policies and regulations. Insight eDiscovery provides case management features for eDiscovery work, including the ability for multiple reviewers to collaborate during the eDiscovery process. Items that are found to be of interest can be exported for external review.

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Note: This updated edition of theInsight eDiscovery User Guideincorporates information about the search feature that was previously included in theInsight eDiscovery Search Guide.

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Recent updates to Insight eDiscovery

Recent updates to Insight eDiscovery include the following:

- Integration with Microsoft Teams, OneDrive for Business, and Enterprise Vault: The search criteria in Insight eDiscovery now include options to search from emails, messages, and files

that are archived from Microsoft Teams, OneDrive, and Enterprise Vault. See About Targeted Collections. and See Adding targeted collection for Microsoft Teams.

- Filtering items in searches based on sentiment score: The filter criteria in searches now include option to filter items based on their sentiment score.
- Collection Defensibility Report: The Targeted Collections page displays an expansion icon for the Enterprise Vault, Microsoft Exchange, and Microsoft Teams reactive collectors that are successfully archived. You can expand the row to view details like Items Collected, Items Received, Items Archived, Items Duplicate, Items Rejected, and Items Failed.

A list of the updates that were included with previous releases of Insight eDiscovery is provided separately.

See About the Insight eDiscovery updates in previous releases.

For full details of all the updates in each release of the Arctera Insight Archiving service suite, see the Arctera Insight Archiving release notes. You can access the release notes from this article.

Insight eDiscovery key features

Insight eDiscovery includes the following features:

- Advanced iterative search capabilities

Insight eDiscovery enables you to accelerate eDiscovery and investigations with powerful search capabilities to deliver fast results. Insight eDiscovery enables you to build iterative searches using multiple criteria and to refine searches until the relevant information is located. If you add any criteria that narrow the search results too significantly, you can delete the term that limited the results, without re-building the entire search.

Once the desired criteria are established, you can save the search. If you save the search as an on-going search, any new items that meet the criteria are automatically found, which significantly reduces review time. Phrase, Boolean, proximity, and wildcard search functionality enables relevant information to be found quickly, and allows further refinement of search results before export.

- Collaborative eDiscovery workflow

Insight eDiscovery provides a built-in collaborative workflow. Insight eDiscovery's case management capabilities enable multiple reviewers to interact and collaborate on a specific case. Once a case is created, you can provision each reviewer with distinct privileges within the case. Reviewers can review messages, view case logs and reports, create exports, manage other

reviewers, and edit a case, depending on their privileges. The external reviewers can have the additional privilege - download shared export - that allows them to download the exports shared by the administrator.

A reviewer with access to a case can use the extensive search capabilities to search the archives of the custodians involved. Searches can be saved and assigned to various reviewers to distribute the workload and expedite the eDiscovery process.

A reviewer can place archived information on legal hold, apply review status tags and labels, categorize information, and add notes for other reviewers.

- Flexible export options

Designated reviewers and administrators can perform online exports of search results. The ability for you to export data yourself minimizes your IT team's workload.

You can export archived information from the archive in EML, PST, and NSF formats, with or without EDRM XML files. The archived information can then be imported into solutions like the Arctera™ Insight eDiscovery Platform. An authorized reviewer or administrator can name and password-protect their exports.

- Hit-highlighting

When reviewing search results, you can quickly identify where your search terms or applied tags appear using hit highlighting. The Preview pane also provides navigation controls to move between each occurrence within the item. For more details, See About Hit Highlighting.

- Reporting

Insight eDiscovery offers reporting functionality for reviewers and administrators to view audit trails for individual messages, or to view the history of an entire case.

- Print to PDF

Insight eDiscovery offers the Print to PDF feature in both, the Investigations and the eDiscovery tab. You can print collaboration messages collected from the *MS Teams* collectors using the Print to PDF feature.

Note:

- This feature is exclusive to *MS Teams* collaboration messages and is not supported for messages collected from other archive collectors.
- This feature is not available for *Production Sets* , as it is not applicable in that context.

- InsightAI assistant

The InsightAI icon is visible only if this service is enabled for your account. Acting as your built-in AI assistant based on Open AI GPT-4.1 Nano model, it delivers faster, smarter, and more reliable answers from both new and saved searches by generating context from emails, collaboration messages, and files. You can use the predefined prompts or enter your own prompt (query) to generate context.

Known limitations affecting the Department Reviewer role

These functional limitations arise from temporary inconsistencies in how department-specific filters, role contexts, and UI states are handled for the Department Reviewer role. Although minor, they affect search persistence, export behavior, and pop-up handling; all identified issues are scheduled for resolution in the next product release.

The limitations are mentioned below:

- Limitations with the Previous Searches functionality:

When a Department Reviewer reruns a *Previous Search* with custom department filters, the application does not retain the original filter configuration, causing inconsistent results. The expected behavior is that all saved filters should persist, and rerunning the search should reproduce identical results to those of the original execution. Until this limitation is fixed in the next release, Department Reviewers must manually reapply the required filters before rerunning a saved search.

- Limitations with an Archive Search within a case:

When a user creates an *Archive Search* within a case, a warning pop-up is incorrectly triggered even though the same user initiates the search. The pop-up does not close automatically and remains visible throughout the session, disrupting normal workflow. This warning is intended to appear only when a user's role or department scope changes; until the issue is resolved, users can safely ignore the pop-up.

- Limitation with the Export Report functionality, if the Department filter is applied:

When a Department Reviewer runs a search that includes a Department filter and attempts to export a report for emails, collaboration items, or files, the download does not start. The Export Report functionality is expected to support all searches, including those filtered by department, but it currently does not generate reports when department-based filters are applied.

- Limitation with renaming a saved search, if the Department filter is applied:

When you create a search on the *Advanced Search*or*Query Search* tab and select a specific department, it saves correctly. However, if you later rename that saved search, the application removes your department selection and saves it under All Departments. In short, renaming a saved search resets the department filter instead of keeping your original selection.

- Limitation with the Export Options dialog box:

The Export Options dialog box may display an incorrect file size when exporting *All Emails*.

Insight eDiscovery term definitions

Table: Insight eDiscovery definitions lists some specific terms that are used in Insight eDiscovery and explains their meaning in this context.

Table: Insight eDiscovery definitions

TERM	DESCRIPTION
Custodian	In the context of Insight eDiscovery, a custodian is anyone for whom your organization holds or has held an archive account. When an eDiscovery Administrator creates a case, they assign the custodians that the associated eDiscovery is to include.
eDiscovery	eDiscovery is the electronic aspect of identifying, collecting, and producing electronically stored information in response to a request for production in a law suit or investigation.
Investigation	In the context of Insight eDiscovery, this term means to examine and discover the factors of a potentially legal inquiry.
Label	Apply a label to an email typically to mark it as exempt from the review process. The default labels are: Spam , Privileged , and Personal . You can create custom labels to suit your company's requirements.

TERM	DESCRIPTION
Legal Hold	A legal hold is a process that an organization uses to preserve relevant information for legal reasons.
Case	In law, a case is a subject that is in controversy or in dispute. In Insight eDiscovery an eDiscovery Administrator creates a case to act as a container in which to associate all the related emails, attachments, collaboration chats, and files for such a subject.
Tag	In Insight eDiscovery a tag is a marker that can be applied to emails, attachments, collaboration chats, and files to help organize the process of investigation or review.
	- In the eDiscovery tab you can tag an email with a review status tag to indicate its status in the eDiscovery review process.
	- You can apply your own custom tags to emails, collaboration messages, and files as you want, for example to retrieve identically tagged items easily at a later time. These tags are visible only to the user that applies them.
	- You can tag items with a managed tag, if you have any of these available to you. Managed tags are created in the Arctera Insight Management Console, under the My Config > Managed Tags node.

Getting started with Insight eDiscovery

This section includes the following topics:

- What's new in this release
- Signing in to Insight eDiscovery
- Logging off from Insight eDiscovery
- Resetting a forgotten password
- About the Insight eDiscovery user interface
- Accessing your own archived emails

What's new in this release

Arctera constantly works on improving the Arctera Insight Archiving product and introduces new features and enhancements release by release. For an easy-to-reference source for all the ways the product is changing, refer to the Arctera Insight Archiving Platform Documentation.

Signing in to Insight eDiscovery

When your company signs up for Insight eDiscovery, you are provided with a user name and password. With these credentials, you can log on to Insight eDiscovery and start using the features that you have the permissions to access.

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Note: Insight eDiscovery users should exercise caution when accessing their accounts from public computers, to maintain the confidentiality of company emails. This note applies especially for administrators and reviewers. **Note:** If your company signed up for Insight eDiscovery and you have not received your credentials, contact your administrator.

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To log on to Insight eDiscovery

1. Navigate to your Insight eDiscovery URL.

2. Enter your username or DOMAIN\username and password.

If you have problems accessing your account, check with your administrator first. If you continue to have difficulty logging on, contact your Technical Support Staff through your administrator.

1. Select a **Security** option.

Refer to the following table for more information:

THIS IS A PUBLIC OR SHARED COMPUTER	PROMPTS YOU FOR YOUR USER NAME AND PASSWORD EACH TIME YOU ACCESS THE LOGON SCREEN, AND LOGS YOU OUT AFTER 20 MINUTES OF INACTIVITY.
	DEFAULT OPTION SELECTED
This is a private computer	Your credentials are stored in your browser's local profile cache for three months, letting you bypass the logon screen after your initial successful logon.
	You can clear this setting by logging out of Insight eDiscovery.

1. Click **Sign In**.
2. If the multi-factor authentication (MFA) is enabled for you, the **OTP** field appears on the authentication screen.

This email-based authentication and the Time-based One Time Password (TOTP) authentication enhances the access and data security of Management Console. Administrators have the permission to enable or disable multi-factor authentication at the user and tenant level.

- If the **email-based authentication** (EML) is enabled for you, a one-time password (OTP) is sent to your registered email address for authentication and access to the application. This OTP remains valid for 5 minutes from the time of receiving the email.

Manually enter the OTP on the authentication screen within 5 minutes. Copy-pasting the OTP is not allowed. If you fail to provide OTP within 5 minutes of receiving it, the application displays a message that the OTP has expired. To obtain a new OTP, click **Resend OTP**. The application sends a new OTP.

- If the **Time-based One Time Password authentication**(TOTP) is enabled for you, the application redirects you to an**Authenticator Setup** page as shown in the sample image below.

Scan the QR Code using the Google or Microsoft **Authenticator** app on your mobile phone at the time of your first login

Configure the Authenticator app on your mobile phone.

Click **Continue** to get a time-based OTP in the Authenticator app.

Enter that OTP in the **OTP**field of the Authentication page, and click**Continue**.

Configuring the Authenticator app on your mobile phone

If you have previously created an account for same user, please remove that entry and attempt to complete the setup again.

To install the Microsoft Authenticator app on your phone

1. While installing the app, if prompted, allow notifications about the app.
2. Upon installation, open the app and click the plus (+) icon at top and select **Work or School account**or**Other account**.
3. Add your work account by using any of the following methods:
    - Use the installed authenticator app to scan the QR Code provided on the authentication page of Arctera Insight Archiving application.
    - Sign in with your application credentials and follow the screen instructions.

Upon successful scanning or signing in, your account gets connected to Microsoft Authenticator.

To install the Google Authenticator app on your phone

1. While installing the app, if prompted, allow notifications about the app.
2. Upon installation, log in with your Google account credentials. Scroll down and click the plus (+) icon.
3. Scan the QR Code with the Google Authenticator app. Your account gets connected to the Google Authenticator app.

Resetting the Authenticator device

If you accidently remove the account from authenticator app or misplace the device on which the app is installed, you can contact your administrator to request for resetting the Authenticator device for you.

About the New Features updates

Upon successful sign-in, the New Features window appears, presenting the latest release updates for Arctera Insight Management Console, Insight eDiscovery, Insight Personal Archive, Arctera Insight Capture, and Arctera Insight Surveillance as shown in the sample image below.

- To temporarily hide this window, click Close.
- To access this window later, click the profile icon and choose Show New Features.
- To permanently hide this window, click Do Not Show Again. Subsequently, upon next login, this window will no longer appear. To enable its visibility, contact your system administrator. However, it will reappear automatically with the next release updates.
- To read the complete release notes document, click View Detailed Release Notes.

Logging off from Insight eDiscovery

To log off from Insight eDiscovery

1. On the Insight eDiscovery user interface, in the upper right-hand corner, click the user profile icon.
2. Click **Log Off**.

Resetting a forgotten password

If you forget your password and need help resetting it, Insight eDiscovery can help you by sending a Reset Password link to your authenticated user name (email address).

To reset your forgotten password

1. On the authentication screen, click the Forgot your password link.
2. In the User Name field, provide your user name (email address).
3. In the Validation Code field, enter the correct captcha from the image, without spaces. Letters are not case-sensitive.

You cannot sign in if your archive fails to authorize your location or computer. You can contact system administrator for assistance.

1. Click **Send**.

The application sends you an email with a reset password link. Check your email inbox, including the spam or junk folder, for this message. This link expires after 30 minutes from you receive the email.

1. Open the password reset email and click on the provided **Reset Password** link.

The application directs you to a **Reset Password** page.

1. Type your user name, a new password, retype to confirm it, and click Submit.

After successful reset, you receive an email notification that your password has been changed successfully.

About the Insight eDiscovery user interface

[] shows a typical view of the Insight eDiscovery user interface that an eDiscovery Administrator can see. All the tabs, options, and icons are clearly arranged with the modern layouts to ensure user friendliness. For easy navigation throughout the application, panes can be hidden and displayed as required. The options are easily available to navigate to the Arctera Insight Management Console, the Arctera Insight Personal Archive, and the Arctera Insight Surveillance portals.

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Note: The tabs, the nodes within each tab, and the features varies with the roles and privileges of your Arctera Insight Archiving account.

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The selection tabs in the left navigation pane control access to the various functions and features of Insight eDiscovery.

After logging in to Insight eDiscovery, the landing page visible to you by default depends on your role in Insight eDiscovery. The following table explains the role and the corresponding landing page.

ROLE	DEFAULT LANDING PAGE
Administrator	eDiscovery > Reviewers
External reviewer	eDiscovery > Cases
Internal reviewer (if managed accounts are assigned)	Investigations > Managed Accounts > Accounts

ROLE	DEFAULT LANDING PAGE
Internal reviewer (if managed accounts are assigned)	Investigations > My Mailbox > Mailbox

- See About the left navigation pane.
- See About the title bar options.
- See About the search bar.
- See About the bottom navigation bar.
- See About the Details pane.

About the left navigation pane

The navigation pane that appears on the left side of the page contains the Investigations and the eDiscovery tabs. You can easily switch between these tabs as required. The Toggle icon allows you to expand and collapse the left navigation pane for a better visibility of the content in the panes available in the right side of the page.

Investigations tab

The Investigations tab provides access to your own archived emails. Administrators and reviewers can also use this tab to access and review the archived emails of user accounts that they manage. External reviewers do not have access to the Investigations tab.

The following nodes are available from the Investigations tab, depending on your account permissions:

- The Targeted Collection node is used to create a targeted collection in Insight eDiscovery console. These collections are the cloned data of an archive collector that is configured in the Archive Administrator console.
- The My Mailbox node is where you can view all of your archived emails, including the emails that were deleted from your email inbox. Note that when viewing your archived emails, certain Personal.cloud features such as search filters and active folders are not available from Insight eDiscovery.

See Accessing your own archived emails.

- The Managed Accounts node is available to users with the Reviewer role, and to administrators with the Monitor All Accounts privilege. The accounts that are assigned to you display when you select the Accounts sub-node. You can use the features available from the Managed Accounts

node to conduct initial, probative, or ad hoc investigations, outside of the legal discovery workflow.

See About Investigations.

- The Labels node is where you can create labels. The emails are classified and displayed based on the labels applied to them. You can click the label to view emails and collaboration messages to which that label is applied.
- The Legal Holds node is where you can view emails with a legal hold.
- The Tags node lets you view and manage the custom tags and the emails with those tags that have been applied in the Investigations tab.
- The Retention Tags node displays the emails to which retention tags are applied.
- The Exports node lets you view the status of email exports that you perform from the Investigations tab.
- The Search Log node is where you can see the Search-specific logs.
- The Continuity - Standby node is an add-on service that provides a "standby mailbox". It enables users to continue to send and receive emails when your organization's mail server is unavailable.

eDiscovery tab

The eDiscovery tab includes the case management feature. This feature allows multiple reviewers to interact and collaborate on litigation cases during the eDiscovery process. Once a case has been created, an eDiscovery Administrator or an assigned reviewer can use searches to find the emails relevant to the case. These searches can then be saved, and the resulting emails assigned to the various reviewers that have been nominated to work on the case. This distribution of the workload among the reviewers expedites the eDiscovery process.

During the review process, reviewers can place emails on legal hold, apply review status tags and labels, and apply custom tags. Reviewers can also add notes to emails that other reviewers who work on the case can view. Additionally, collaborative eDiscovery includes various reporting features, that allow reviewers to view audit trails for individual emails or the history of an entire case.

See About cases.

The following nodes are available from the eDiscovery tab, depending on your account permissions:

- The Dashboard node lets you view and export cases summary reports.
- The Reviewers node lets you view Mailbox and Case access detail of the reviewers. You can export the reviewers summary reports for later use.
- The Review Status node lets you define the review status tags and define the active and default tags.
- The Redaction Reasons node lets you add and delete the reasons that you can use during creating production sets.
- The Cases node lets you manage cases that are assigned to you. After you select the case, the separate case-specific node appears below the Cases node to perform various operations.

About the title bar options

The title bar contains the following icons:

- Keyboard: You can use this icon to access (navigate to) the Arctera Insight Management Console, the Arctera Insight Personal Archive portal, and the Arctera Insight Surveillance portal.
    - The Arctera Insight Management Console option provides administrators with access to the Arctera Insight Management Console. The Arctera Insight Management Console appears in a new web browser tab. It enables administrators to configure archive settings and to assign roles, including the roles that control the access to Insight eDiscovery. Role assignment is only available to System Administrators or to Role Managers with the required permissions.
    - The Arctera Insight Personal Archive option provides administrators with access to the Arctera Insight Personal Archive console.
    - The Arctera Insight Surveillance option provides administrators with access to the Arctera Insight Surveillance console.

See About account roles and Insight eDiscovery.

For reviewers and users with the Account role, the Administration option displays options to change your password and personal time zone.

- Help: You can use this icon to access user help documentation of Arctera Insight eDiscovery.
- User Profile: You can use this icon to view the alerts, statistics, time zone, and change password options. These options varies with your role. You can log off your on-going session by selecting the log off option.

    - The Alerts option allows administrators and reviewers to quickly and easily create alerts. Alerts are a helpful tool for administrators and reviewers, as they help monitor your company's email usage.

See Creating an alert.

- The Statistics option provides administrators with archive statistics. The statistics available from this tab include Number of active accounts, Top policy alerts trending, Number of emails received, and Average mailbox size. This option is not available for a reviewer or account users.
- The Set Time Zone option allows reviewers and account users to select the appropriate time zone for them.
- The Log Off option lets you to log off securely from the current session of Insight eDiscovery.

About the search bar

Use the quick search to quickly find content on the page. You can also click the arrow in the search field, to search using the Criteria Search filter.

See About Quick Search and Criteria Search.

About the bottom navigation bar

This bar displays total number of pages, total number of records on a page, and the navigation options that are supported for multi-page lists.

- Click on the page number to display and navigate to a selected page.
- Click the |< icon to go to the First page of the list.
- Click the >| icon to go to the Last page of the list.
- Click the < icon to go to the Previous page of the list.
- Click the > icon to go to the Next page of the list.

About the Details pane

This pane displays the records with subsequent details. You can click on the column headings to sort the data either in ascending or descending order for one or more columns on the selected page.

For a better readability purpose, this pane shows limited columns. To view the additional columns on the page, click the Columns icon as shown in the sample image below. Select the additional columns you want to see and click Apply.

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Note: TheColumnsfunctionality is available for all the searches in theInvestigationandeDiscoverytabs. However, for Advanced ECA searches, this functionality is available forFilestab only, and not forEmailsandCollaborationtabs.

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Accessing your own archived emails

Insight eDiscovery users can view and access their own archived emails from the Investigations tab > My Mailbox node. You can view all of your archived emails, including the emails that were deleted from your email inbox.

My Mailbox has similar functionality to your Insight Personal Archive archive. You can view and search your own emails. You can also reply and forward your emails from here. You cannot restore emails to your own account from Insight eDiscovery and can only restore mails to the accounts which you monitor.

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Note: When you view your archived emails, certain Insight Personal Archive features such as search filters and active folders are not available from Insight eDiscovery.

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When you select an email from the list, a preview pane displays the message. You can move this preview pane to underneath or to the right side of the main pane. The preview pane displays the message content and any attachments that are included with the original email.

You can double-click an email in the list to open the email in a separate window.

Getting started with Alta eDiscovery

This section includes the following topics:

- What's new in this release
- Signing in to Alta eDiscovery
- Logging off from Alta eDiscovery
- About the Alta eDiscovery user interface
- Accessing your own archived emails

About the Alta eDiscovery user interface

Figure: Alta eDiscovery User Interface shows a typical view of the Alta eDiscovery user interface that an eDiscovery Administrator can see. All the tabs, options, and icons are clearly arranged with the modern layouts to ensure user friendliness. For easy navigation throughout the application, panes can be hidden and displayed as required. The options are easily available to navigate to the Veritas Alta View Compliance and Governance Management Console, the Veritas Alta Personal Archive, and the Veritas Alta Surveillance portals.

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Note: The tabs, the nodes within each tab, and the features varies with the roles and privileges of your Veritas Alta Archiving account.

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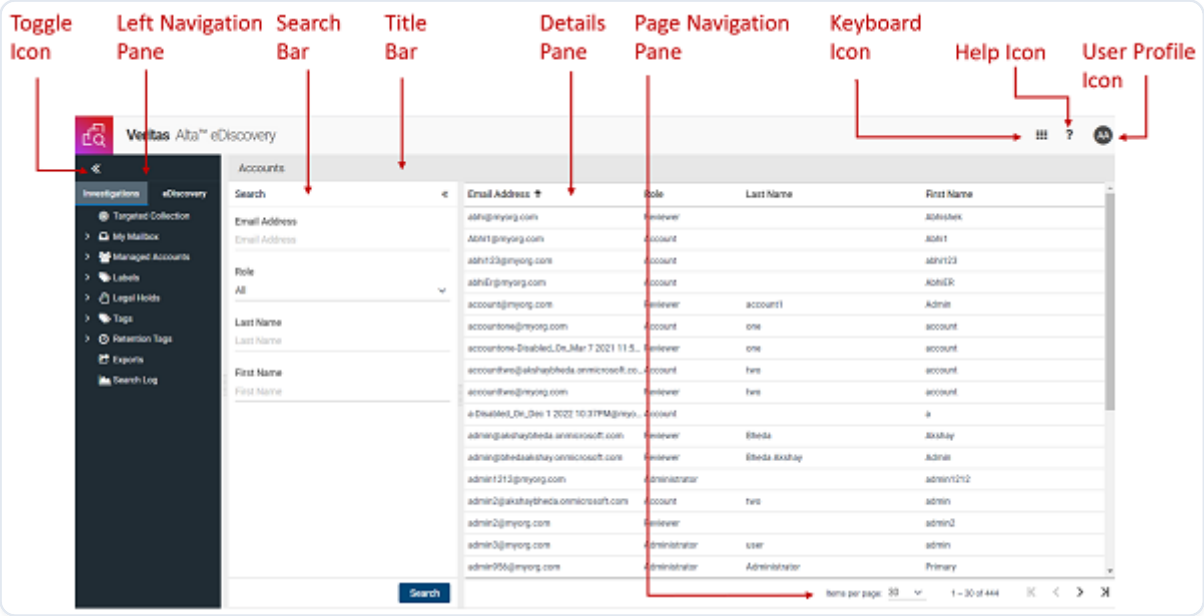
Figure: Alta eDiscovery User Interface



The selection tabs in the left navigation pane control access to the various functions and features of Alta eDiscovery.

After logging in to Alta eDiscovery, the landing page visible to you by default depends on your role in Alta eDiscovery. The following table explains the role and the corresponding landing page.

ROLE	DEFAULT LANDING PAGE
Administrator	eDiscovery > Reviewers
External reviewer	eDiscovery > Cases
Internal reviewer (if managed accounts are assigned)	Investigations > Managed Accounts > Accounts
Internal reviewer (if managed accounts are assigned)	Investigations > My Mailbox > Mailbox

- See About the left navigation pane.
- See About the title bar options.
- See About the search bar.
- See About the bottom navigation bar.
- See About the Details pane.

About the left navigation pane

The navigation pane that appears on the left side of the page contains the Investigations and the eDiscovery tabs. You can easily switch between these tabs as required. The Toggle icon allows you to expand and collapse the left navigation pane for a better visibility of the content in the panes available in the right side of the page.

Investigations tab

The Investigations tab provides access to your own archived emails. Administrators and reviewers can also use this tab to access and review the archived emails of user accounts that they manage. External reviewers do not have access to the Investigations tab.

The following nodes are available from the Investigations tab, depending on your account permissions:

- The Targeted Collection node is used to create a targeted collection in Alta eDiscovery console. These collections are the cloned data of an archive collector that is configured in the Archive Administrator console.
- The My Mailbox node is where you can view all of your archived emails, including the emails that were deleted from your email inbox. Note that when viewing your archived emails, certain Personal.cloud features such as search filters and active folders are not available from Alta eDiscovery.

See Accessing your own archived emails.

- The Managed Accounts node is available to users with the Reviewer role, and to administrators with the Monitor All Accounts privilege. The accounts that are assigned to you display when you select the Accounts sub-node. You can use the features available from the Managed Accounts node to conduct initial, probative, or ad hoc investigations, outside of the legal discovery workflow.

See About Investigations.

- The Labels node is where you can create labels. The emails are classified and displayed based on the labels applied to them. You can click the label to view emails and collaboration messages to which that label is applied.
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- The Tags node lets you view and manage the custom tags and the emails with those tags that have been applied in the Investigations tab.
- The Retention Tags node displays the emails to which retention tags are applied.

- The Exports node lets you view the status of email exports that you perform from the Investigations tab.
- The Search Log node is where you can see the Search-specific logs.
- The Continuity - Standby node is an add-on service that provides a "standby mailbox". It enables users to continue to send and receive emails when your organization's mail server is unavailable.

eDiscovery tab

The eDiscovery tab includes the case management feature. This feature allows multiple reviewers to interact and collaborate on litigation cases during the eDiscovery process. Once a case has been created, an eDiscovery Administrator or an assigned reviewer can use searches to find the emails relevant to the case. These searches can then be saved, and the resulting emails assigned to the various reviewers that have been nominated to work on the case. This distribution of the workload among the reviewers expedites the eDiscovery process.

During the review process, reviewers can place emails on legal hold, apply review status tags and labels, and apply custom tags. Reviewers can also add notes to emails that other reviewers who work on the case can view. Additionally, collaborative eDiscovery includes various reporting features, that allow reviewers to view audit trails for individual emails or the history of an entire case.

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- The Dashboard node lets you view and export cases summary reports.
- The Reviewers node lets you view Mailbox and Case access detail of the reviewers. You can export the reviewers summary reports for later use.
- The Review Status node lets you define the review status tags and define the active and default tags.
- The Redaction Reasons node lets you add and delete the reasons that you can use during creating production sets.
- The Cases node lets you manage cases that are assigned to you. After you select the case, the separate case-specific node appears below the Cases node to perform various operations.

About the title bar options

The title bar contains the following icons:

- Keyboard: You can use this icon to access (navigate to) the Veritas Alta View Compliance and Governance Management Console, the Veritas Alta Personal Archive portal, and the Veritas Alta Surveillance portal.
    - The Veritas Alta View Compliance and Governance Management Console option provides administrators with access to the Veritas Alta View Compliance and Governance Management Console. The Veritas Alta View Compliance and Governance Management Console appears in a new web browser tab. It enables administrators to configure archive settings and to assign roles, including the roles that control the access to Alta eDiscovery. Role assignment is only available to System Administrators or to Role Managers with the required permissions.
    - The Veritas Alta Personal Archive option provides administrators with access to the Veritas Alta Personal Archive console.
    - The Veritas Alta Surveillance option provides administrators with access to the Veritas Alta Surveillance console.

See About account roles and Alta eDiscovery.

For reviewers and users with the Account role, the Administration option displays options to change your password and personal time zone.

- Help: You can use this icon to access user help documentation of Veritas Alta eDiscovery.
- User Profile: You can use this icon to view the alerts, statistics, time zone, and change password options. These options varies with your role. You can log off your on-going session by selecting the log off option.
    - The Alerts option allows administrators and reviewers to quickly and easily create alerts. Alerts are a helpful tool for administrators and reviewers, as they help monitor your company's email usage.

See Creating an alert.

- The Statistics option provides administrators with archive statistics. The statistics available from this tab include Number of active accounts, Top policy alerts trending, Number of emails received, and Average mailbox size. This option is not available for a reviewer or account users.

- The Set Time Zone option allows reviewers and account users to select the appropriate time zone for them.
- The Log Off option lets you to log off securely from the current session of Alta eDiscovery.

About the search bar

Use the quick search to quickly find content on the page. You can also click the arrow in the search field, to search using the Criteria Search filter.

See About Quick Search and Criteria Search.

About the bottom navigation bar

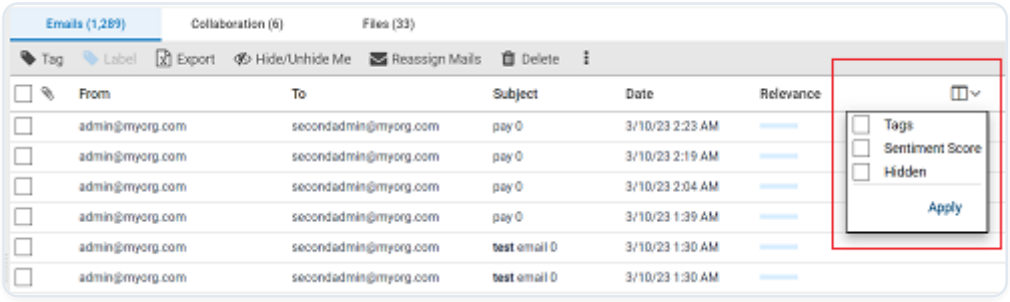
This bar displays total number of pages, total number of records on a page, and the navigation options that are supported for multi-page lists.

- Click on the page number to display and navigate to a selected page.
- Click the |< icon to go to the First page of the list.
- Click the >| icon to go to the Last page of the list.
- Click the < icon to go to the Previous page of the list.
- Click the > icon to go to the Next page of the list.

About the Details pane

This pane displays the records with subsequent details. You can click on the column headings to sort the data either in ascending or descending order for one or more columns on the selected page.

For a better readability purpose, this pane shows limited columns. To view the additional columns on the page, click the Columns icon as shown in the sample image below. Select the additional columns you want to see and click Apply.



> “ ”

Note: TheColumnsfunctionality is available for all the searches in theInvestigationandeDiscoverytabs. However, for Advanced ECA searches, this functionality is available forFilestab only, and not forEmailsandCollaborationtabs.

> “ ”

Insight eDiscovery roles

This section includes the following topics:

- About account roles and Insight eDiscovery
- Account role
- Reviewer role
- Administrator role
- Assigning account roles

About account roles and Insight eDiscovery

Arctera Insight Archiving accounts are each assigned to one of the following roles:

- Account
- Reviewer
- Administrator

System Administrators and Role Managers with the required privileges can assign accounts to one of these roles in the Role Management node of the Arctera Insight Management Console.

The role to which your account is assigned and the associated privileges that are granted to it determine the menu options and features that you can access from Insight eDiscovery.

Account role

Available Insight eDiscovery tabs: Investigations in the left navigation pane and the Administration option on the Profile icon in the top-right corner of the application page (for setting personal preferences only).

Users with the Account role have the least access to Insight eDiscovery. They have access only to the Investigations tab, from where they can view their own archived emails.

Note that Insight Personal Archive is the preferred access method for users to view archived emails. Insight Personal Archive allows users to tag and restore archived emails into their own inbox.

> “ ”

Note: In one case, those accounts with theAccountrole can have greater access in Insight eDiscovery. Administrators can configure the account in Archive Administration to make it anExternal Reviewer. These accounts are for users who are not part of your organization, but who need to review emails within the cases that are assigned to them#. External reviewers have their account disabled for archiving, and can only access theeDiscoverytab in Insight eDiscovery. Within theeDiscoverytab the external reviewers can perform similar tasks as those accounts with theReviewerrole. See the Archive Administration help for more information about creatingExternal Revieweraccounts.

> “ ”

Reviewer role

Available Insight eDiscovery tabs: Investigations and eDiscovery in the left navigation pane, and the Administration option on the Profile icon in the top-right corner of the application page (for setting personal preferences only), and Alerts option on the Profile icon in the top-right corner of the application page.

Users with the Reviewer role can monitor employee emails for the material that does not follow company communication policies. An administrator or HR representative typically reviews the email of reviewers, so that no employees are exempt from following company communication policies. Organizations should take special care in selecting the appropriate employees for the Reviewer role, since reviewers can see other employees' emails. Reviewers should not share their user name and password with anyone.

When you assign an account the Reviewer role, you can allow the account to monitor all of the accounts in Arctera Insight Archiving, or a selected subset. You can use the Disable preview mail check box to prohibit email preview. It limits reviewers to only check the emails between sender and recipients.

In the Investigations tab, reviewers can perform open-ended investigative searches against one or all of the accounts that they have the permissions to monitor.

In the eDiscovery tab, reviewers have access only to those cases that are assigned to them.

When the eDiscovery Administrator creates a case, they assign the case to one or more reviewers. Each reviewer can be assigned a set of permissions within each case. A reviewer can perform some or all of the following functions within a case, depending on the permissions that they are assigned for that case:

- Review the emails that result from the searches that are associated with the case.
- View the case logs and reports.
- Manage on-going and standard searches of emails.
- Perform and manage searches on the emails that are associated with the case.
- Export emails.
- Place emails on legal hold.
- Edit the case for example to reassign searches to different reviewers.

> “ ”

Note: Accounts with theReviewerrole only see theeDiscoverytab once they have been assigned as a reviewer to at least one case.

> “ ”

Administrator role

Available Insight eDiscovery tabs: Investigations, eDiscovery tabs in the left navigation pane, and the Alerts and Statistics option on the Profile icon in the top-right corner of the application page.

The Administrator role is for company administrators who need to configure and manage Insight eDiscovery, or for HR personnel who need to monitor employee email usage.

Administrator roles must be assigned the Monitor All Accounts privilege in the Arctera Insight Management Console if they are to monitor email usage. Unlike the accounts with the Reviewer role, the accounts with the Administrator role cannot be granted access to selected accounts only.

Accounts with the Administrator role and with the Monitor All Accounts privilege can be assigned to cases as reviewers, and can act as reviewers in the same way as the accounts with the Reviewer role.

Administrators can also receive email notifications each time a message is flagged in the Alerts area.

> “ ”

Note: Accounts with theAdministratorrole can be assigned additional privileges in Archive Administration, including the privileges that can be conferred by built-in group roles. The accounts with theAdministratorrole that are also assigned theeDiscovery Administratorbuilt-in role have full access to all the features of Insight eDiscovery.

> “ ”

The eDiscovery Administrators can configure and manage all aspects of Insight eDiscovery, including the following:

- Creating, viewing, and editing cases
- Managing reviewers
- Adding and editing labels
- Assigning review status tags to emails
- Managing case review status tags
- Managing searches under cases
- Exporting emails from cases
- Viewing logs and saving reports

Given the sensitive nature of the information available to administrators, they should take special care to protect their logon credentials.

Assigning account roles

To assign roles to an account you must be a System Administrator or have the required Modify Privileges privilege.

Administrators can access the Arctera Insight Management Console from the Administration option on the Profile icon in the top-right corner of the application page.

- See Assigning the Reviewer role to an account.
- See Assigning the Administrator role to an account.

Assigning the Reviewer role to an account

To assign roles to an account you must be a System Administrator or have the Modify Privileges privilege.

To assign the **Reviewer** role to an account

1. In Insight eDiscovery, click the profile icon available in the top-right corner of the application page and select **Arctera Insight Management Console**. The management console opens in a new browser window.
2. Log on to the Arctera Insight Management Console as a System Administrator or with an account that has the **Modify Privileges** privilege.
3. Under the **Role Management**node, select**Assign Accounts**.
4. From the list of accounts, select the required user.
5. Select **Reviewer**from the**Role** drop-down menu.
6. Do the following:
    - Select the **Monitor All Accounts** check box to allow the user to monitor all user accounts.
    - If required, select the **Disable preview mail** to prohibit the reviewer from viewing preview of email content.
    - Or click **Add/Remove Monitored Accounts** and select the accounts for this reviewer to monitor.

When you have selected the required accounts, click **Update**and then click**Close**to close the**Add/Remove Monitored Accounts** window.

In the **Accounts to Monitor**list, if you want the reviewer privilege to expire for any account, clear the check box in the**Never Expires**column for that account. Then in the**Expiration**column, click the**Calendar** icon and select the date that you want the reviewer privilege to expire.

1. Click **Save** to save the role changes for the account.

Assigning the Administrator role to an account

To assign roles to an account you must be a System Administrator or have the Modify Privileges privilege.

To assign the **Administrator** role to an account

1. In Insight eDiscovery, click the profile icon available in the top-right corner of the application page and select **Arctera Insight Management Console**. The management console opens in a new browser window.
2. Log on to the Arctera Insight Management Console as a System Administrator or with an account that has the **Modify Privileges** privilege.
3. Under the **Role Management**node, select**Assign Accounts**.
4. Select the required user from the list of accounts.
5. From the **Role**drop-down menu, select**Administrator**.
6. To allow the account to monitor all user accounts, select the **Monitor All Accounts** check box.

If you do not select this option the account cannot view any user accounts other than their own.

1. If you want to assign **eDiscovery Administrator**privileges to the account, under**Built-in Roles**select the**eDiscovery Administrator** check box.
2. Click **Save** to save the role changes for the account.

Managing investigations

This section includes the following topics:

- About Investigations
- About Targeted Collections
- About Analytics Dashboard
- About Managed Accounts
- About Searches in investigation
- About Hit Highlighting
- Working with searched emails
- Working with searched collaboration messages
- Working with searched files
- Working with Advanced ECA searches
- Creating archive sets during investigation
- About Mail Reassignment
- About labels
- About legal holds
- About Tags
- About search log
- About transcription of media attachments

About Investigations

From the Insight eDiscovery Investigations tab, administrators or reviewers can conduct initial, probative, or ad hoc investigations on the archives of the accounts that they have the privileges to monitor. For example, you can assess compliance to corporate content or regulatory policies before deciding whether there is a requirement to create a tracked eDiscovery case.

Typically, an investigation is an internal search. For example, you can assess compliance to corporate content policies, or respond to a request to find private information on a user. You can search for data in the items of multiple user accounts all in one place.

You can search the archives of the accounts that you manage from the Managed Accounts node. From here you can access, review, and work with the archived items of interest as in the eDiscovery tab. The difference is that in the Investigations tab the search and the work that you do with the items is not tracked as part of a case. Also in investigations the review status tags are not available.

In investigations, permission to view the items of others is solely dependent on the roles and permissions of your account as configured in Archive Administration. The constraints that are enforced within a case and a Review Set are not present.

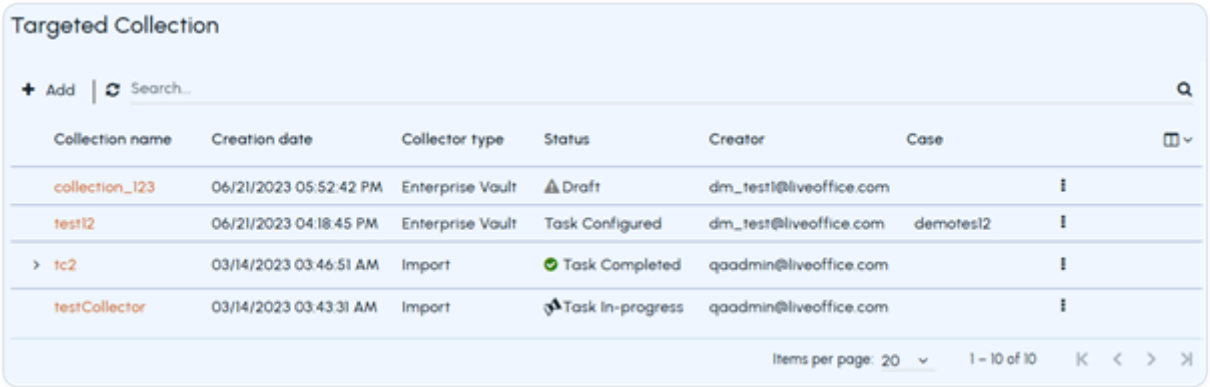
About Targeted Collections

A targeted collection is a cloned data set of an archive collector which is configured in the Arctera Insight Management Console. You can create and manage targeted collections in the Insight eDiscovery. These collections allow retrieval of filtered content for eDiscovery purposes. After an administrator configures the archive collector for your organization, the content that matches the filter criteria can be collected in Insight eDiscovery.

Before creating a targeted collection in Insight eDiscovery, make sure the following prerequisites are met in the Management Console

- the customer is already created
- the service for this collector is enabled for that customer
- the Archive Collector is configured

After creating a targeted collection, the Targeted Collection table displays all collectors along with their configuration status, type, and metadata. Use the table to monitor collector readiness before assigning them to a case. Refer to the sample image below.



COLUMNS	DESCRIPTION
Collection name	Displays the name of the targeted collection.

COLUMNS	DESCRIPTION
	You can expand the row to view collection details such as items collected, items received, items archived, items duplicate, items rejected, and items failed. You can also download the Collection Defensibility Report .
Creation date	Shows the date and time the collection was created.
Collector type	Indicates the type of a collector.
Status	Displays the current status of the collector.
	- Draft : The collection status is not yet configured or the task is in an incomplete state.
	- Task In-progress : The collector is configured and the collection task is automatically queued or resumed for data collection.
	- Stopped : The collector is stopped manually for some reason. If you want to restart the stopped collection, you can start the collector from the More actions icon. The status then again updates to Task In-progress .
	- Task Completed : The collection task is successfully completed and the Collection Defensibility Report is available to download.
Creator	Displays a name of a user who has created the collector.
Case	Displays the name of cases (to which the items are sent) assigned to the collector, if applicable.
More actions icon	Provides options to manage the collector. The available options are Start, Stop, Restart, Hide, and Show. See Managing Insight Capture collectors from Insight eDiscovery .

Adding targeted collection for Microsoft Teams

To configure Targeted Collection for Microsoft Teams

1. On the **Investigations**tab, in the left navigation pane, select**Targeted Collection**.
2. Click **Add** to set up Microsoft Teams collector.

   > “ ”

   Note: At the time of adding the first collector, theSetup Collectionbutton appears in the middle of the screen. If one or more collectors are already added, theAddoption appears.

   > “ ”

3. On the **Collection Information** tab, specify the following:

COLLECTION NAME	PROVIDE A UNIQUE NAME FOR THIS COLLECTION.
Email	Enter email to get notification once the targeted collection has finished processing.
Select a collector to get data from	Select the Microsoft Teams collector that is already configured in Arctera Insight Archiving Arctera Insight Management Console.
	Note: If theEV Folder Targetfield is set toNowhile configuring the Microsoft Teams archive collector in the Insight Archiving Management Console, the collector does not appear in the drop-down list during targeted collection configuration in Insight eDiscovery. This is because items from such collectors are not ingested into Insight Archiving - whether through regular, proactive, or cloned targeted collection.

4. Click **Save and Next**to navigate to the**Filters** tab.
5. On the **Filters** tab, specify the following:

USER SOURCE CONFIGURATION	**- SELECT THE ALL USERS OPTION TO INCLUDE ALL THE AVAILABLE USERS.**
	- SELECT THE SELECT USERS FROM LIST OPTION TO OPEN THE LIST OF ALL USERS. SELECT THE USERS WHOSE ACTIVITIES YOU WANT TO COLLECT., AND CLICK CONFIRM .
	SYNCHRONIZING USER ACCOUNTS:
	TO GET THE LATEST USER LIST, CLICK THE SYNC ICON. THIS SYNCHRONIZATION PROCESS MAY TAKE SEVERAL MINUTES AS IT SYNCHRONIZES ALL THE ACCOUNTS FROM THE CONTENT SOURCE.
	RESETTING CURRENT USER SELECTION:
	CLICK THE RESET ICON TO RESET THE LIST OF MONITORED USERS TO THE LASTLY-SAVED SELECTION.
Select matching method for the keyword search	Provide any words that you want to search in the collaboration messages. Press ENTER to confirm the word or a phrase.
	You can enter multiple words and phrases.
	Select All to consider all the specified words and phrases you want to search and collect.
	Select Any to consider any of the specified words and phrases you want to search and collect.
Select date range	Specify the date range for collection. The available options are Before, After, and Between.
Captured Modern Attachment	Select any of the following options as required\:

USER SOURCE CONFIGURATION	- SELECT THE ALL USERS OPTION TO INCLUDE ALL THE AVAILABLE USERS.
	- SELECT THE SELECT USERS FROM LIST OPTION TO OPEN THE LIST OF ALL USERS. SELECT THE USERS WHOSE ACTIVITIES YOU WANT TO COLLECT., AND CLICK CONFIRM .
	SYNCHRONIZING USER ACCOUNTS:
	TO GET THE LATEST USER LIST, CLICK THE SYNC ICON. THIS SYNCHRONIZATION PROCESS MAY TAKE SEVERAL MINUTES AS IT SYNCHRONIZES ALL THE ACCOUNTS FROM THE CONTENT SOURCE.
	RESETTING CURRENT USER SELECTION:
	CLICK THE RESET ICON TO RESET THE LIST OF MONITORED USERS TO THE LASTLY-SAVED SELECTION.
	- Latest version : Select this option to capture the latest saved version of the shared document that is available at connector runtime.
	- Shared version : Select this option to capture the saved version of the document at the time of sharing in Microsoft Teams.

6. Click **Save and Next**to navigate to the**Send to Cases** tab.
7. On the **Send to Cases** tab, specify the following:

SEND TO EXISTING CASE	**ALTHOUGH THIS FIELD IS OPTIONAL, THE CHECK BOX IS SELECTED BY DEFAULT.**
	- IF YOU WANT TO SEND A SEARCH RESULT TO CASES, SELECT THIS CHECK BOX AND CHOOSE ONE OR MORE CASES FROM THE LIST OF AVAILABLE CASES. NAVIGATE TO THE NEXT AND PREVIOUS PAGES TO ACCESS THE AVAILABLE CASES.
	- IF YOU DO NOT WANT TO SEND A SEARCH RESULT TO CASES, CLEAR THIS CHECK BOX. UPON CLEARING THIS CHECK BOX, THE APPLICATION DISPLAYS A CONFIRMATION PROMPT THAT YOU HAVE NOT SELECTED ANY CASE TO SEND THE COLLECTED ITEMS. DO THE FOLLOWING AS REQUIRED: CLICK NO TO ASSIGN A CASE AND COMPLETE THE SETUP. CLICK YES TO PROCEED WITHOUT SELECTING A CASE. THIS ALLOWS YOU TO ARCHIVE THE ITEMS FIRST AND SEND THEM TO THE REQUIRED CASES LATER.
Collection set name	Enter the collection set name.
	When you select a single or multiple cases in the eDiscovery tab, the node of this name is displayed under the Case Documents node.
	After the targeted collector is configured and the displayed status is Archived , all the items are sent to this Collection Set in the respective cases under the Case Documents node.

8. Click **Save and Next**to navigate to the**Review** tab.
9. On the **Review** tab, do the following:
    - Check the configuration information to ensure accuracy.
    - To modify configuration information, click the corresponding **Edit** link.

10. If the data is correct, click **Complete**.

The Microsoft Teams archive collector appears on the Targeted Collections page.

> “ ”

Note: If the status of the Microsoft Teams targeted collector isArchived, you can expand the targeted collector row to view theCollection Defensibility Reportof the Teams-specific reactive data. It displays the details like Items Collected, Items Received, Items Archived, Items Duplicate, Items Rejected, and Items Failed. To download the Collection Defensibility Report, click theDownloadicon.

> “ ”

1. If the status of the targeted collector is **Incomplete** , modify the collector configuration. To modify the configuration, click on the targeted collection name.

   > “ ”

   Note: If the configuration is incomplete, user cannot collect items properly. User cannot remove the previously selected and saved options.

   > “ ”

2. If the status of the targeted collector is **Archived**, and you want to send items to cases, click**Send to case** in the respective row.

See Sending collected data to cases.

Adding targeted collection for OneDrive for Business

The OneDrive for Business reactive collector lets your organization collect files that are associated with customer's OneDrive cloud storage. After an administrator configures this collector for your organization, the files that match the user source criteria can be collected in Insight eDiscovery.

You must configure the user source criteria for each OneDrive for Business reactive collector. Based on this user source criteria, the OneDrive reactive collector collects the files in Insight eDiscovery to perform all eDiscovery operations.

You can configure this targeted collection only if the Insight eDiscovery primary service and the OneDrive for Business secondary service is enabled for a required customer is enabled in the Arctera Insight Archiving Arctera Insight Management Console. You must possess the administrator role to configure the OneDrive for Business reactive collector synchronization in Insight eDiscovery.

To configure Targeted Collection for OneDrive for Business

1. On the **Investigations**tab, in the left navigation pane, select**Targeted Collection**.
2. Click **Add**and select the**OneDrive for Business** collector.

   > “ ”

   Note: At the time of adding the first collector, theSet up Collectionbutton appears in the middle of the screen. If one or more collectors are already added, theAddoption appears.

   > “ ”

3. On the **Collection Information** tab, specify the following:

COLLECTION NAME	PROVIDE A UNIQUE NAME FOR THIS COLLECTION.
Email	Enter email to get notification once the targeted collection has finished processing.
Select a collector to get data from	Select the OneDrive for Business collector that is already configured in Arctera Insight Archiving Arctera Insight Management Console.
	Note: If theEV Folder Targetfield is set toNowhile configuring the OneDrive for Business archive collector in the Insight Archiving Management Console, the collector does not appear in the drop-down list during targeted collection configuration in Insight eDiscovery. This is because items from such collectors are not ingested into

COLLECTION NAME	PROVIDE A UNIQUE NAME FOR THIS COLLECTION.
	Insight Archiving - whether through regular, proactive, or cloned targeted collection.

4. Click **Save and Next**to navigate to the**Filter** tab.
5. On the **Filter** tab, specify the following:

USER SOURCE CONFIGURATION	- SELECT THE ALL USERS OPTION TO INCLUDE ALL THE AVAILABLE USERS.
	- SELECT THE SELECT USERS FROM LIST OPTION TO OPEN THE LIST OF ALL USERS. SELECT THE USERS WHOSE ACTIVITIES YOU WANT TO COLLECT, AND CLICK CONFIRM .
	SYNCHRONIZING USER ACCOUNTS
	TO GET THE LATEST USER LIST, CLICK SYNC . THIS SYNCHRONIZATION PROCESS MAY TAKE SEVERAL MINUTES AS IT SYNCHRONIZES ALL THE ACCOUNTS FROM THE CONTENT SOURCE.
	RESETTING CURRENT USER SELECTION:
	CLICK THE RESET ICON TO RESET THE LIST OF MONITORED USERS TO THE LASTLY-SAVED SELECTION.
Select matching method for the keyword search	Provide any words contained in the file name or other file metadata. Press ENTER to confirm the word or a phrase.
	You can enter multiple words and phrases.
	Select All to consider all the specified words and phrases you want to search and collect.

USER SOURCE CONFIGURATION	- SELECT THE ALL USERS OPTION TO INCLUDE ALL THE AVAILABLE USERS.
	- SELECT THE SELECT USERS FROM LIST OPTION TO OPEN THE LIST OF ALL USERS. SELECT THE USERS WHOSE ACTIVITIES YOU WANT TO COLLECT, AND CLICK CONFIRM .
	SYNCHRONIZING USER ACCOUNTS
	TO GET THE LATEST USER LIST, CLICK SYNC . THIS SYNCHRONIZATION PROCESS MAY TAKE SEVERAL MINUTES AS IT SYNCHRONIZES ALL THE ACCOUNTS FROM THE CONTENT SOURCE.
	RESETTING CURRENT USER SELECTION:
	CLICK THE RESET ICON TO RESET THE LIST OF MONITORED USERS TO THE LASTLY-SAVED SELECTION.
	Select Any to consider any of the specified words and phrases you want to search and collect.
Select date range	Specify the date range for collection. The available options are Before, After, and Between.

6. Click **Save and Next**to navigate to the**Send to Cases** tab.
7. On the **Send to Cases** tab, specify the following:

SEND TO EXISTING CASE	**ALTHOUGH THIS FIELD IS OPTIONAL, THE CHECK BOX IS SELECTED BY DEFAULT.**
	- IF YOU WANT TO SEND A SEARCH RESULT TO CASES, SELECT THIS CHECK BOX AND CHOOSE ONE OR MORE CASES FROM THE LIST OF AVAILABLE CASES. NAVIGATE TO THE NEXT AND PREVIOUS PAGES TO ACCESS THE AVAILABLE CASES.
	- IF YOU DO NOT WANT TO SEND A SEARCH RESULT TO CASES, CLEAR THIS CHECK BOX. UPON CLEARING THIS CHECK BOX, THE APPLICATION DISPLAYS A CONFIRMATION PROMPT THAT YOU HAVE NOT SELECTED ANY CASE TO SEND THE COLLECTED ITEMS. DO THE FOLLOWING AS REQUIRED: CLICK NO TO ASSIGN A CASE AND COMPLETE THE SETUP. CLICK YES TO PROCEED WITHOUT SELECTING A CASE. THIS ALLOWS YOU TO ARCHIVE THE ITEMS FIRST AND SEND THEM TO THE REQUIRED CASES LATER.
Collection set name	Enter the collection set name.
	When you select a single or multiple cases in the eDiscovery tab, the node of this name is displayed under the Case Documents node.
	After the targeted collector is configured and the displayed status is Archived , all the items are sent to this Collection Set in the respective cases under the Case Documents node.

8. Click **Save and Next**to navigate to the**Review** tab.
9. On the **Review** tab, do the following:
    - Check the configuration information to ensure accuracy.
    - To modify configuration information, click the corresponding **Edit** link.

10. If the data is correct, click **Complete**.

The OneDrive for Business archive collector appears in the Targeted Collections page.

> “ ”

Note: If the status of the OneDrive targeted collector isArchived, you can expand the targeted collector row to view theCollection Defensibility Reportof the OneDrive-specific reactive data. It displays the details like Items Collected, Items Received, Items Archived, Items Duplicate, Items Rejected, and Items Failed. To download the Collection Defensibility Report, click theDownloadicon.

> “ ”

1. If the status of the targeted collector is **Incomplete** , modify the collector configuration. To modify the configuration, click on the targeted collection name.

   > “ ”

   Note: If the configuration is incomplete, items cannot be sent to case. User cannot modify the previously selected and saved options.

   > “ ”

2. If the status of the targeted collector is **Archived**, and you want to send items to cases, click**Send to case** in the respective row.

See Sending collected data to cases.

Adding targeted collection for Exchange Online

To configure Targeted Collection for Exchange Online

1. On the **Investigations**tab, in the left navigation pane, select**Targeted Collection**.
2. Click **Add**.

The **Select Collector Type** pop up appears.

1. Select **Exchange Online**.

2. On the **Collection Information** tab, specify the following:

COLLECTION NAME	PROVIDE A UNIQUE NAME FOR THIS COLLECTION.
Email	Enter email to get notification once the targeted collection has finished processing.
Select a collector to get data from	Select the Exchange Online collector that is already configured in Arctera Insight Archiving Arctera Insight Management Console.

3. Click **Save and Next**to navigate to the**Filters** tab.
4. On the **Filters** tab, specify the following:

USER SOURCE CONFIGURATION	- SELECT THE ALL USERS OPTION TO INCLUDE ALL THE AVAILABLE USERS.
	- SELECT THE SELECT USERS FROM LIST OPTION TO OPEN THE LIST OF ALL USERS. SELECT THE USERS WHOSE ACTIVITIES YOU WANT TO COLLECT., AND CLICK CONFIRM .
	SYNCHRONIZING USER ACCOUNTS:
	TO GET THE LATEST USER LIST, CLICK THE SYNC ICON. THIS SYNCHRONIZATION PROCESS MAY TAKE SEVERAL MINUTES AS IT SYNCHRONIZES ALL THE ACCOUNTS FROM THE CONTENT SOURCE.
	RESETTING CURRENT USER SELECTION:
	CLICK THE RESET ICON TO RESET THE LIST OF MONITORED USERS TO THE LASTLY-SAVED SELECTION.
Select matching method for the keyword search	Provide any words that you want to search in the email subject and email body content. Press ENTER to confirm the word or a phrase.

USER SOURCE CONFIGURATION	**- SELECT THE ALL USERS OPTION TO INCLUDE ALL THE AVAILABLE USERS.**
	- SELECT THE SELECT USERS FROM LIST OPTION TO OPEN THE LIST OF ALL USERS. SELECT THE USERS WHOSE ACTIVITIES YOU WANT TO COLLECT., AND CLICK CONFIRM .
	SYNCHRONIZING USER ACCOUNTS:
	TO GET THE LATEST USER LIST, CLICK THE SYNC ICON. THIS SYNCHRONIZATION PROCESS MAY TAKE SEVERAL MINUTES AS IT SYNCHRONIZES ALL THE ACCOUNTS FROM THE CONTENT SOURCE.
	RESETTING CURRENT USER SELECTION:
	CLICK THE RESET ICON TO RESET THE LIST OF MONITORED USERS TO THE LASTLY-SAVED SELECTION.
	You can enter multiple words and phrases.
	Select All to consider all the specified words and phrases you want to search and collect.
	Select Any to consider any of the specified words and phrases you want to search and collect.
Select date range	Specify the date range for collection. The available options are Before, After, and Between.
Captured Modern Attachment	Select any of the following options as required\:
	- Latest version : Select this option to capture the latest saved version of the shared document that is available at connector runtime.

USER SOURCE CONFIGURATION	- SELECT THE ALL USERS OPTION TO INCLUDE ALL THE AVAILABLE USERS.
	- SELECT THE SELECT USERS FROM LIST OPTION TO OPEN THE LIST OF ALL USERS. SELECT THE USERS WHOSE ACTIVITIES YOU WANT TO COLLECT., AND CLICK CONFIRM .
	SYNCHRONIZING USER ACCOUNTS:
	TO GET THE LATEST USER LIST, CLICK THE SYNC ICON. THIS SYNCHRONIZATION PROCESS MAY TAKE SEVERAL MINUTES AS IT SYNCHRONIZES ALL THE ACCOUNTS FROM THE CONTENT SOURCE.
	RESETTING CURRENT USER SELECTION:
	CLICK THE RESET ICON TO RESET THE LIST OF MONITORED USERS TO THE LASTLY-SAVED SELECTION.
	- Shared version : Select this option to capture the saved version of the document at the time of sharing in Microsoft Teams.

5. Click **Save and Next**to navigate to the**Send to Cases** tab.
6. On the **Send to Cases** tab, specify the following:

SEND TO EXISTING CASE	**ALTHOUGH THIS FIELD IS OPTIONAL, THE CHECK BOX IS SELECTED BY DEFAULT.**
	- IF YOU WANT TO SEND A SEARCH RESULT TO CASES, SELECT THIS CHECK BOX AND CHOOSE ONE OR MORE CASES FROM THE LIST OF AVAILABLE CASES. NAVIGATE TO THE NEXT AND PREVIOUS PAGES TO ACCESS THE AVAILABLE CASES.
	- IF YOU DO NOT WANT TO SEND A SEARCH RESULT TO CASES, CLEAR THIS CHECK BOX. UPON CLEARING THIS CHECK BOX, THE APPLICATION DISPLAYS A CONFIRMATION PROMPT THAT YOU HAVE NOT SELECTED ANY CASE TO SEND THE COLLECTED ITEMS. DO THE FOLLOWING AS REQUIRED: CLICK NO TO ASSIGN A CASE AND COMPLETE THE SETUP. CLICK YES TO PROCEED WITHOUT SELECTING A CASE. THIS ALLOWS YOU TO ARCHIVE THE ITEMS FIRST AND SEND THEM TO THE REQUIRED CASES LATER.
Collection set name	Enter the collection set name.
	When you select a single or multiple cases in the eDiscovery tab, the node of this name is displayed under the Case Documents node.
	After the targeted collector is configured and the displayed status is Archived , all the items are sent to this Collection Set in the respective cases under the Case Documents node.

7. Click **Save and Next**to navigate to the**Review** tab.
8. On the **Review** tab, do the following:
    - Check the configuration information to ensure accuracy.
    - To modify configuration information, click the corresponding **Edit** link.

9. If the data is correct, click **Complete**.

The Exchange Online archive collector appears on the Targeted Collections page.

> “ ”

Note: If the status of the Microsoft Teams targeted collector isArchived, you can expand the targeted collector row to view theCollection Defensibility Reportof the Exchange Online-specific reactive data. It displays the details like Items Collected, Items Received, Items Archived, Items Duplicate, Items Rejected, and Items Failed. To download the Collection Defensibility Report, click theDownloadicon.

> “ ”

1. If the status of the targeted collector is **Incomplete** , modify the collector configuration. To modify the configuration, click on the targeted collection name.

   > “ ”

   Note: If the configuration is incomplete, user cannot collect items properly. User cannot remove the previously selected and saved options.

   > “ ”

2. If the status of the targeted collector is **Archived**, and you want to send items to cases, click**Send to case** in the respective row.

See Sending collected data to cases.

Adding targeted collection for Enterprise Vault

The Enterprise Vault reactive collector lets your organization collect items that are associated with your Enterprise Vault. After an administrator configures this collector for your organization, the items that match the filter criteria can be collected in Insight eDiscovery.

You must configure the filter criteria for each Enterprise Vault reactive collector. Based on the filter criteria, the Enterprise Vault reactive collector collects the archive-level and vault-level data in Insight eDiscovery to perform all eDiscovery operations.

Prerequisite: Before you use the Enterprise Vault collector Insight eDiscovery to collect Enterprise Vault content, you need to enable this service. To enable Enterprise Vault service, do the following:

1. Contact Arctera™ Insight support team to enable the Enterprise Vault collector in Arctera Insight Archiving.
2. Install the Enterprise Vault Agent on a server that can access your Enterprise Vault environment.

You can download the Enterprise Vault Agent from here

1. Refer the following procedure to configure the Targeted Collection for Enterprise Vault.

To configure Targeted Collection for Enterprise Vault

1. On the **Investigations**tab, in the left navigation pane, select**Targeted Collection**.
2. Click **Add** and select the Enterprise Vault collector.

   > “ ”

   Note: At the time of adding the first collector, theSet up Collectionbutton appears in the middle of the screen. If one or more collectors are already added, theAddoption appears.

   > “ ”

3. On the **Collection Information** tab, specify the following:

COLLECTION NAME	PROVIDE A UNIQUE NAME FOR THIS COLLECTION.ARCTERA INSIGHT ARCHIVING
Email	Enter email to get notification once the targeted collection has finished processing.
Select a site	If you have multiple sites in your Enterprise Vault environment or have multiple individual Enterprise Vault environments, the application displays a list of all sites which this tenant has as a part of direct migration agent configuration.

COLLECTION NAME	PROVIDE A UNIQUE NAME FOR THIS COLLECTION.ARCTERA INSIGHT ARCHIVING
	Select a required site from the displayed options.

4. Click **Save and Next**to navigate to the**Filter** tab.
5. On the **Filter** tab, do the following:

DATE	SPECIFY THE DATE RANGE FOR COLLECTION. THE AVAILABLE OPTIONS ARE BEFORE, AFTER, AND BETWEEN.
Vault stores and Archives	Select the appropriate vault stores or archives in which you want to search the data.
	It supports selecting vault stores and archives from multiple sites.
	- Select the All vault stores option to consider all the available vault stores to search items.
	- Select the Selected vault store(s) option to select the required vault stores for the selected archives. The Select vault(s) button appears. Click Select vault(s) to search for and select the required vaults for searching items. You can remove the selection from the same dialog box.
	- Select the All archives option to consider all the available archives to search items.
	- Select the Selected archive(s) option to select the required archives. The Select archive(s) button appears. Click Select Vault(s) to search for and select the required archives for searching items. You can remove the selection from the same dialog box.

DATE	SPECIFY THE DATE RANGE FOR COLLECTION. THE AVAILABLE OPTIONS ARE BEFORE, AFTER, AND BETWEEN.
	- If you have many archives for targeted collection, use the Import functionality that supports importing data in the CSV format. Click Import , and choose a CSV file with the list of archives. The CSV file must contain Archive IDs in the first column. The file should not contain any other information. It may lead to error during the import.
Search terms	Specify the criteria with the help of keywords. It helps you to restrict searching items from the selected vault stores and archives.
	Use the plus-icon to save the search term and add a new criteria under the Search terms section.
	Use the minus-icon to remove an existing criteria.
Attachments	Specify the file types (Enterprise Vault compatible file extensions such as .pdf, .doc, .zip, and so on) that you want to collect during data collection from Enterprise Vault.
Custom attributes	Specify attributes that you want to include in the search configuration.
	If you want to provide several attributes, specify either All of or Any of option under the Attribute inclusion section. It determines whether the search results should match any of the
	attributes or all of them.

6. Click **Save and Next**to navigate to the**Send to Cases** tab.
7. On the **Send to Cases** tab, specify the following:

SEND TO EXISTING CASE	**ALTHOUGH THIS FIELD IS OPTIONAL, THE CHECK BOX IS SELECTED BY DEFAULT.**
	- IF YOU WANT TO SEND A SEARCH RESULT TO CASES, SELECT THIS CHECK BOX AND CHOOSE ONE OR MORE CASES FROM THE LIST OF AVAILABLE CASES. NAVIGATE TO THE NEXT AND PREVIOUS PAGES TO ACCESS THE AVAILABLE CASES.
	- IF YOU DO NOT WANT TO SEND A SEARCH RESULT TO CASES, CLEAR THIS CHECK BOX. UPON CLEARING THIS CHECK BOX, THE APPLICATION DISPLAYS A CONFIRMATION PROMPT THAT YOU HAVE NOT SELECTED ANY CASE TO SEND THE COLLECTED ITEMS. DO THE FOLLOWING AS REQUIRED: CLICK NO TO ASSIGN A CASE AND COMPLETE THE SETUP. CLICK YES TO PROCEED WITHOUT SELECTING A CASE. THIS ALLOWS YOU TO ARCHIVE THE ITEMS FIRST AND SEND THEM TO THE REQUIRED CASES LATER.
Collection set name	Enter the collection set name.
	When you select a single or multiple cases in the eDiscovery tab, the node of this name is displayed under the Case Documents node.
	After the targeted collector is configured and the displayed status is Archived , all the items are sent to this Collection Set in the respective cases under the Case Documents node.

8. Click **Save and Next**to navigate to the**Review** tab.
9. On the **Review** tab, do the following:
    - Check the configuration information to ensure accuracy.
    - To modify configuration information, click the corresponding **Edit** link.

10. If the data is correct, click **Complete**.

The Enterprise Vault reactive collector appears in the Targeted Collections page.

> “ ”

Note: If the status of the Enterprise Vault targeted collector isArchived, you can expand the targeted collector row to view theCollection Defensibility Reportof the Enterprise Vault reactive data. It displays the details like Items Collected, Items Received, Items Archived, Items Duplicate, Items Rejected, and Items Failed. To download the Collection Defensibility Report, click theDownloadicon.

> “ ”

1. If the status of the targeted collector is **Incomplete** , modify the collector configuration. To modify the configuration, click on the targeted collection name.

   > “ ”

   Note: If the configuration is incomplete, items cannot be sent to case. User cannot remove the previously selected and saved options.

   > “ ”

2. If the status of the targeted collector is **Archived**, and you want to send items to cases, click**Send to case** in the respective row.

See Sending collected data to cases.

Adding targeted collection for data import

The data (files) import collector lets your organization collect files. This collector supports files with extension ZIP, PDF, DOC, DOCX, PPT, PPTX, XLS, XLSX, CSV, PST, EML, MSG, and DAT. You can compress these extension files into ZIP file for import. After an administrator configures this importer, the files uploaded in this importer gets processed.

Prerequisite: Before you configure a file importer in Insight eDiscovery, the Arctera Insight Management Console administrator must create and enable the Data Uploading archive collector in Arctera Insight Management Console.

Before you import files in the importer, you must understand the following conditions:

- This type of collector supports ZIP, PDF, DOC, DOCX, PPT, PPTX, XLS, XLSX, CSV, PST, EML, MSG, and DAT file extensions.
- Each file should not exceed 2 GB size.
- Total upload size should not exceed 20 GB size.
- ZIP file inside ZIP file will not get processed.
- After you upload the files using collector, you cannot upload more files in same collector.

To configure targeted collection for data import

1. On the **Investigations**tab, in the left navigation pane, select**Targeted Collection**.
2. Click **Add** to set up data importer.

The **Select Collector Type** pop up appears.

1. Select **Import** , and specify the following details:.

IMPORTER NAME	ENTER A UNIQUE NAME FOR THE IMPORTER. THIS IS A MANDATORY FIELD.
Description	Provide the description (purpose) for the importer. This is an optional field.

2. Click **Create Importer**.
3. On the **Upload files and import data**page, Click**Import**or**Browse** to add files that you want to upload.

The selected files are listed with corresponding details. To remove files from this list, select the check box in the file details row, and click the **Delete** icon.

1. Click **Upload**. Do not refresh the screen while uploading is in progress.

The file upload status is displayed after uploading is completed. If you have uploaded several files, use the page navigation bar to view the files.

1. Click the **Targeted Collection** node to view the import details report.

2. After successful data uploading, the importer appears on the **Targeted Collections** page.

> “ ”

Note: If the status of the importer isArchived, you can expand the importer row to view theCollection Defensibility Reportof the importer-specific data. It displays the details like Items Collected, Items Received, Items Archived, Items Duplicate, Items Rejected, and Items Failed. To download theCollection Defensibility Report, click theDownloadicon. The collection defensibility report consists two sections:File DetailsandEML Details. TheFile Detailssections provides details of ZIP, PDF, DOC, DOCX, PPT, PPTX, XLS, XLSX, CSV, and DAT files. TheEML Detailssections provides details of loose PST, EML,and MSG files.

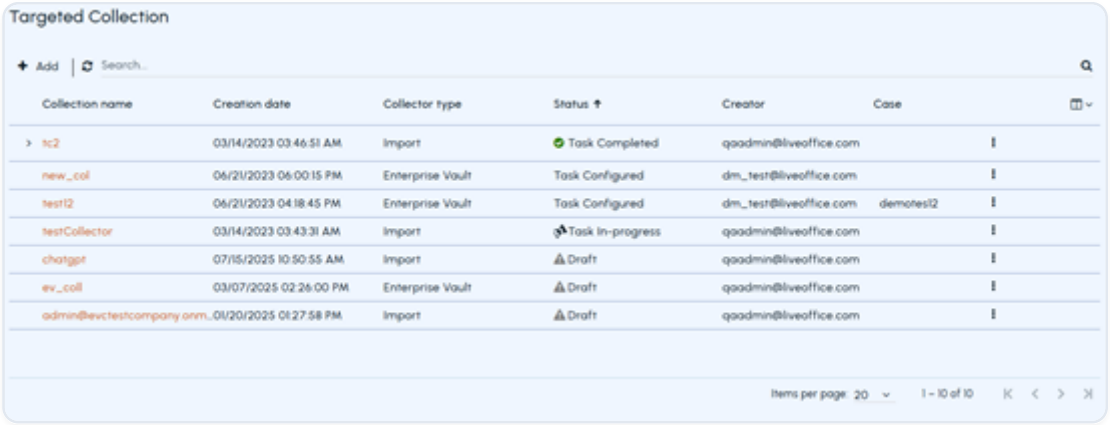
> “ ”

Managing Insight Capture collectors from Insight eDiscovery

To manage Insight Capture collectors from Insight eDiscovery

1. On the **Investigations**tab, select**Targeted Collection**.

A list of existing collection names are displayed.



1. Search for a collector on which you want to perform a required action.
2. Perform the following actions, as needed:

- **To start a collector** :

Make sure the collection status is shown as *Stopped*. Click the **More actions**icon, and then click**Start**.

The collection status updates to *Task In-progress*.

> “ ”

Note: TheStartoption appears only when the collector is in theStoppedstate.

> “ ”

- **To stop a collector** :

Make sure the collection status is shown as *Task In-progress*. Click the **More actions**icon, and then click**Stop**.

The collection status updates to *Stopped*.

- **To restart a collector** :

Make sure the *Collection Defensibility Report*is showing*Failed*or*Rejected* items. Click the **More actions**icon, and then click**Restart**.

The restart operation begins the collection process from the start and the collection status gets updated to *Task In-progress*.

> “ ”

Note: TheRestartoption appears only when theCollection Defensibility ReportshowsFailedorRejecteditems. Otherwise, this option remains unavailable in theMore actionsmenu.

> “ ”

- **To hide a collector** :

Click the **More options**icon in the corresponding row, and then click**Hide**.

> “ ”

Note: Hidden collectors remain in the system and reappear in the table when you selectShow Hidden.

> “ ”

- **To view hidden collectors**, click the**Select columns to show or hide**icon displayed in the top-right corner of the table, click the**Show Hidden**check box, and then click**Apply**.
- **To unhide (show) a collector** :

Click the **Select columns to show or hide**icon displayed in the top-right corner of the table, click the**Show Hidden**check box, and then click**Apply**. Locate the collector you want to unhide (show) in the main table again. Click the**More actions**icon, and then click**Show**.

Sending collected data to cases

To send collected data to cases

1. On the **Investigations**tab, select**Targeted Collection**.
2. Search for and select the collection name with the *Task Completed* status.
3. Expand the Collection Name to view the collection details.
4. Click **Send to Case** link from the same row.
5. In the **Send to Cases** dialog box, specify the following:

SEND TO EXISTING CASE	**ALTHOUGH THIS FIELD IS OPTIONAL, THE CHECK BOX IS SELECTED BY DEFAULT.**
	- IF YOU WANT TO SEND A SEARCH RESULT TO CASES, SELECT THIS CHECK BOX AND CHOOSE ONE OR MORE CASES FROM THE LIST OF AVAILABLE CASES. NAVIGATE TO THE NEXT AND PREVIOUS PAGES TO ACCESS THE AVAILABLE CASES.
	- IF YOU DO NOT WANT TO SEND A SEARCH RESULT TO CASES, CLEAR THIS CHECK BOX. UPON CLEARING THIS CHECK BOX, THE APPLICATION DISPLAYS A CONFIRMATION PROMPT THAT YOU HAVE NOT SELECTED ANY CASE TO SEND THE COLLECTED ITEMS. DO THE FOLLOWING AS REQUIRED: CLICK NO TO ASSIGN A CASE AND COMPLETE THE SETUP. CLICK YES TO PROCEED WITHOUT SELECTING A CASE. THIS ALLOWS YOU TO ARCHIVE THE ITEMS FIRST AND SEND THEM TO THE REQUIRED CASES LATER.
Collection set name	Enter the collection set name.
	When you select a case in the eDiscovery tab, the node of this name is displayed under the Case Documents node.
	Note: After sending a collection set to the selected case, it is recommended to wait for some time for indexing items of this collection set under theCase Documentsnode. until the indexing is not complete, you may view the partial results. Once the indexing is complete, all the items will be available.

6. Click **Confirm**.

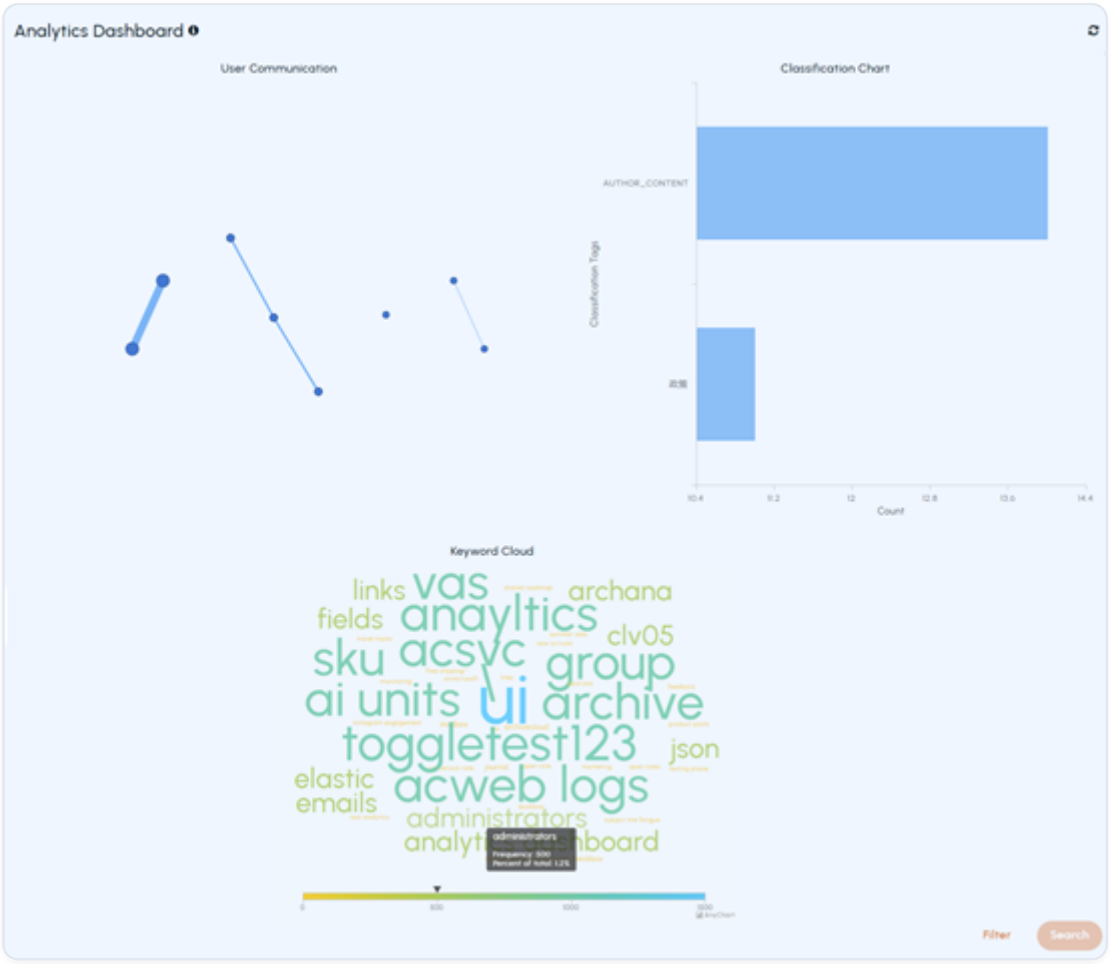
About Analytics Dashboard

Administrators can use the Analytics Dashboard to visualize the archived user communication data (emails only) of the top 50 users in the last 30 days. Analytics Dashboard displays this data in the form of charts for better visualization. Administrators can use this data to create searches for retrieving communication and classification information of a user. Based on the selected data, administrators can efficiently obtain more specific, limited, and accurate search results while investigation.

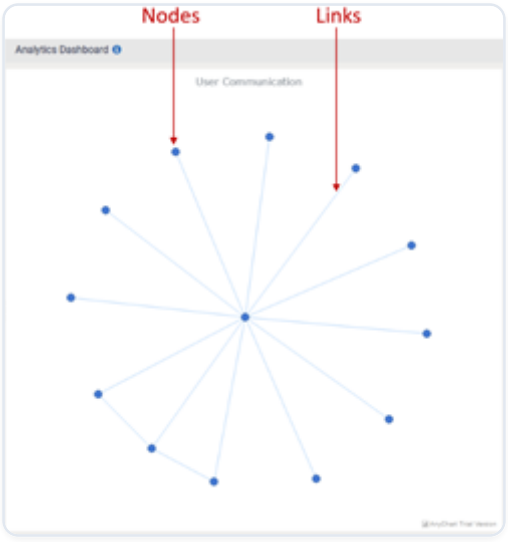
At present, the application provides you with the following charts:

- User communication chart
- Classification chart
- Keyword Cloud

The Analytics Dashboard is shown in the sample image below.



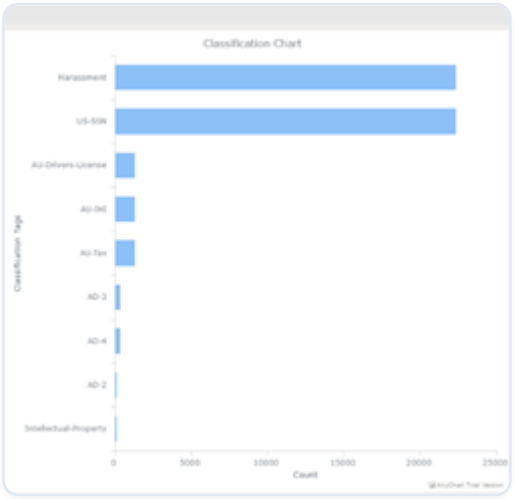
User Communication Chart



The chart has Nodes and Links connecting these nodes. Nodes in the chart represent users, and links represent the connections between or among these nodes. To select a node, click on the node. To select multiple nodes, press and hold the CTRL key on your keyboard, then click on the nodes you want to select. To enhance readability, you can drag any node away from crowded areas to separate it from neighboring nodes.

Hovering over nodes provides the user email address. Whereas hovering over links displays the user email addresses of individuals in communication.

Classification chart



This is a graphical representation of the user communication chart.

The charts are interconnected. Hence, selecting or filtering the data (nodes and links) in the *User Communication*chart leads to the automatic selection of corresponding data in the*Classification* chart and vice versa. You can only select one filter criteria at a time. If you wish to search communication data using a different filter, in such a scenario, click the Back icon, choose the desired link or node, and then click Search. Click the Refresh icon to refresh the monitoring data.

Keyword Cloud

The Keyword Cloud provides deeper communication insights, improving the accuracy and efficiency of investigations through interconnected dashboard views.

It displays the most exchanged keywords between users over the past 30 days to help identify key topics or emerging trends. It shows keyword frequency with trend lines, allows hover for details, and supports multi-select for focused searches across the dashboard.

Performing query searches using Analytics Dashboard

The Analytics Dashboard supports query searches only. Based on the data selected on charts, this query search provides you with the filtered archived review items.

To perform a query search using Analytics Dashboard

1. On the **Investigation**tab, in the left navigation pane, select**Analytics Dashboard**.

The application displays the *User Communication*and*Classification* charts for analysis of email communication of the top 50 users in the last 30 days.

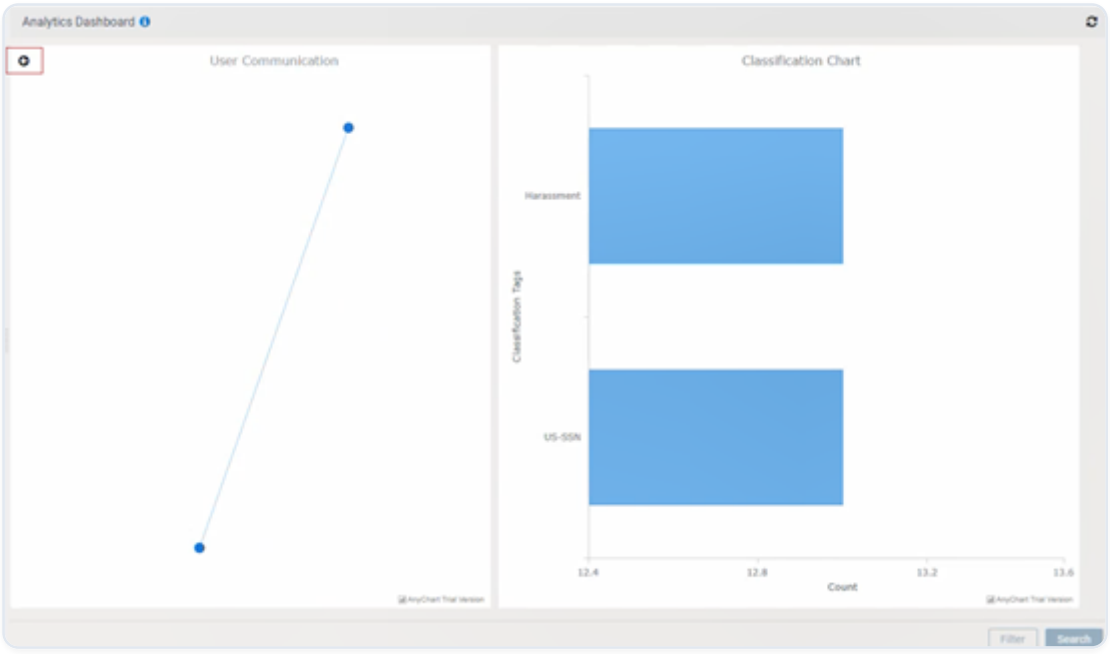
1. On the **User Communication** chart, do the following:
    - Hover over nodes and links to view the user email addresses of individuals involved in communication.
    - Select the data in any chart, as convenient, for which you want further analysis.
        - If you want to select data from the *User Communication* chart, select nodes or links . To select a node, click on the node. To select multiple nodes, press and hold the CTRL key on your keyboard, then click on the nodes you want to select.
        - If you want to select data from the *Classification* chart, select bars. To select a single bar, click on the bar. To select multiple bars, press and hold the CTRL key on your keyboard, then click on the bars you want to select.

As the charts are interconnected, selecting the data in the *User Communication*chart leads to the automatic selection of corresponding data in the*Classification* chart and vice versa.

- If required, click the **Refresh** icon to refresh the monitoring data.
- For better readability of charts:
    - You can select and drag the nodes away from crowded areas to separate them from neighboring nodes.
    - Keyboard and mouse users can use CTRL + Mouse wheel up/down to zoom in/out the chart view.
    - Touchpad users can use a two-finger pinch to zoom in or stretch out to zoom out the chart view.

1. In the bottom-right corner of the page, click **Filter**.

The application displays only the selected node or link and retrieves the communication threads among the individuals involved in the communication. In case there is no data for the selected node or link, the application prompts that the information is not available.



> “ ”

Note: You can only select one filter criteria at a time. If you wish to search communication data using a different filter, in such a scenario, click theBackicon, choose the desired link or node.

> “ ”

1. Click **Search**.

Before redirecting you to the search results, the application warns that your selected filter will be cleared if you click *Yes* on the confirmation message.

1. Click **Yes** on the confirmation message if you are sure with the data you have selected in the charts.

Based on the data selected on charts, this query search provides you with the filtered archived review items.

About Managed Accounts

On the Investigations tab, the Managed Accounts node is available to those users with Administrator or Reviewer role privileges. The accounts to which you are assigned are listed when you select the Accounts sub-node. You can use the features available from the Managed Accounts node to conduct initial, probative, or ad hoc investigations, outside of the legal discovery workflow.

When you are ready to conduct searches and reviews on a specific subject, you can create a case in the eDiscovery tab to track these searches.

About Searches in investigation

This section describes the tasks related to searches during investigation.

Creating a new search

You can search the content of archive accounts from the Investigations tab, using Advanced Search and Query Search.

To create a new search

1. Select the **Investigations** tab, and then select the node where you want to perform the new search:
    - To search your own mailbox, select **My Mailbox > Mailbox**, or select**My Mailbox > New Search**.
    - To search one or more of your managed accounts, select **Managed Accounts > New Search**.
    - To search a single managed account, select **Managed Accounts > Accounts**, and click the required account. The**Search** pane appears.
2. To perform advanced search, specify the following inputs in the **Advanced Search** tab.

CUSTODIANS	**- SELECT ALL TO SEARCH ARCHIVES OF ALL OF THE CUSTODIANS THAT ARE ASSOCIATED WITH THE CASE.**
	- SELECT CUSTOM TO SEARCH ARCHIVES OF THE PARTICULAR CUSTODIANS. THE MANAGE BUTTON APPEARS. CLICK MANAGE TO OPEN THE ADD/REMOVE CUSTODIANS . EXPAND SELECTED CUSTODIANS TO VIEW THE CUSTODIANS SELECTED FOR THIS SEARCH. EXPAND MANAGE CUSTODIANS AND SELECT THE CUSTODIANS REQUIRED FOR THIS SEARCH. CLICK UPDATE TO ADD THESE SELECTED CUSTODIANS AS A SEARCH INPUT. THESE CUSTODIANS ARE LISTED UNDER THE SELECTED CUSTODIANS SECTION.
Custom Headers	**Note:** TheCustom Headersoption does not appear if there is no entry for a custom header for a particular group or tenant in database. Custom header does not work independently. You need to use the filter criteria to search the required items.
	Expand Custom Headers and set the header operator values.
	- Click + to add new search clauses.
	- Click - to remove search clauses that are not required.
	- In the first column, select the required header you want to search for. Based on the data type you have selected, the operator changes. For example, if you have selected the receiver date in header, the operator values can be Between , Before inclusive and After inclusive . For a numeric or integer header value, the operator values can be Is equal to , Less than , and Greater than . If

CUSTODIANS	**- SELECT ALL TO SEARCH ARCHIVES OF ALL OF THE CUSTODIANS THAT ARE ASSOCIATED WITH THE CASE.**
	- SELECT CUSTOM TO SEARCH ARCHIVES OF THE PARTICULAR CUSTODIANS. THE MANAGE BUTTON APPEARS. CLICK MANAGE TO OPEN THE ADD/REMOVE CUSTODIANS . EXPAND SELECTED CUSTODIANS TO VIEW THE CUSTODIANS SELECTED FOR THIS SEARCH. EXPAND MANAGE CUSTODIANS AND SELECT THE CUSTODIANS REQUIRED FOR THIS SEARCH. CLICK UPDATE TO ADD THESE SELECTED CUSTODIANS AS A SEARCH INPUT. THESE CUSTODIANS ARE LISTED UNDER THE SELECTED CUSTODIANS SECTION.
	you have selected a string value in header, then the operator will be Contains .
	- In the second column, select the available operator.
	- In the third column, specify the text, phrase, or date that you want to search for.
Filters	Expand Filters and set the filter operator values. The operators are explained in a table below.
	- Select All to match all conditions you have provided.
	- Select Any to match any of the conditions you have provided.
	- Click + to add new search clauses, and complete a new row for each clause.
	- Click - to remove search clauses that are not required.

CUSTODIANS	**- SELECT ALL TO SEARCH ARCHIVES OF ALL OF THE CUSTODIANS THAT ARE ASSOCIATED WITH THE CASE.**
	- SELECT CUSTOM TO SEARCH ARCHIVES OF THE PARTICULAR CUSTODIANS. THE MANAGE BUTTON APPEARS. CLICK MANAGE TO OPEN THE ADD/REMOVE CUSTODIANS . EXPAND SELECTED CUSTODIANS TO VIEW THE CUSTODIANS SELECTED FOR THIS SEARCH. EXPAND MANAGE CUSTODIANS AND SELECT THE CUSTODIANS REQUIRED FOR THIS SEARCH. CLICK UPDATE TO ADD THESE SELECTED CUSTODIANS AS A SEARCH INPUT. THESE CUSTODIANS ARE LISTED UNDER THE SELECTED CUSTODIANS SECTION.
	- Searches are not case-sensitive. The search supports phrase search, Boolean operators, proximity search, and wildcard search. See Search syntax for Advanced Search .

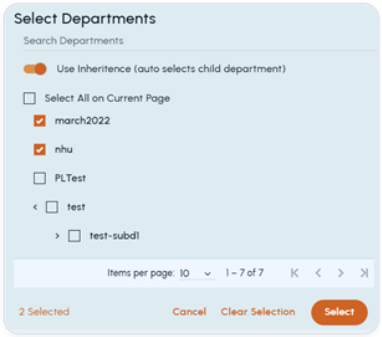
The **Filter** operators are listed below:

MESSAGE	ENTIRE MESSAGE	CONTAINS / DOESN'T CONTAIN
Subject + Body	Contains / Doesn't Contain	-
Subject	Contains / Doesn't Contain	-
Body	Contains / Doesn't Contain	-
Inbound Message (AND)	Yes / No	-
	Note: The inbound message direction is decided differently based on the custodian selection: - Upon selectingall custodians, the message direction is determined at	

MESSAGE	ENTIRE MESSAGE	CONTAINS / DOESN'T CONTAIN
	themessage level. Such message is treated asmessage-level inboundwhen it is sent to an internal domain from an external domain, independent of who the custodian is. - Upon selectingspecific custodians, the message direction is determined at thecustodian level. Such message is treated ascustodian-level inboundwhen it is sent by the selected custodian, regardless of whether the recipient is internal or external.	
Outbound Message (AND)	Yes / No	-
	Note: The outbound message direction is decided differently based on the custodian selection: - Upon selectingall custodians, the message direction is determined at themessage level. Such message is treated asmessage-level outboundwhen it is sent from an internal domain to an external domain, independent of who the custodian is. - Upon selectingspecific custodians, the message direction is determined at thecustodian level. Such message is treated ascustodian-level	

MESSAGE	ENTIRE MESSAGE	CONTAINS / DOESN'T CONTAIN
	outboundwhen it is sent by the selected custodian, regardless of whether the recipient is internal or external.	
Internal Message (AND)	Yes / No	-
	Note:	
	- In Advanced Search , this option filters and retrieves only internal messages exchanged within the same organization.	
	- In Query Search , use: `Internal:(3)` to include or `NOT Internal:(3)` to exclude	
Is Hidden	Yes / No	-
IP Header	Contains / Doesn't Contain	-
Date Sent/Modified(AND)	Is Equal To	Select a date
Date Sent/Modified(AND)	Before	Select a date
Date Sent/Modified(AND)	After	Select a date
Date Sent/Modified(AND)	Within Range	Select a date range
Participants	All Senders and Recipients	Contains / Doesn't Contain
Participants	Senders Only	Contains / Doesn't Contain
Participants	Recipients Only	Contains / Doesn't Contain
Participants	To/Cc	Contains / Doesn't Contain

MESSAGE	ENTIRE MESSAGE	CONTAINS / DOESN'T CONTAIN
Participants	To	Contains / Doesn't Contain
Participants	Bcc	Contains / Doesn't Contain
Classification	Classified As	Contains / Doesn't Contain
Note: This option is available if the Arctera Insight Classification service is enabled for a user.		Select a classification tag from the drop-down list. The list shows all the classification tags that have been applied to your company's messages in Arctera Insight Archiving.
		To see a tooltip with a classification tag's description, select the classification tag from the drop-down list and then point to the classification tag.
Classification	Sentiment Score	Is Equal To / Below (Inc.) / Above (Inc.)
Note: This option is available if the Arctera Insight Classification service is enabled for a user.		
Attachment	Has Attachment	Yes / No
Attachment	File/Attachment Name	Contains / Doesn't Contain
Attachment	File Attachment Type	Contains / Doesn't Contain
		See Searchable attachment types .
Archive Date	Is Equal To : Finds items archived on a specific date.	Select date.

MESSAGE	ENTIRE MESSAGE	CONTAINS / DOESN'T CONTAIN
Filter archived data based on the date when emails, collaboration items, or files were archived.	Before : Finds items archived before a certain date.	**Note:** Use this filter only for the data archived after January 2021. Data before January 2021 will not appear in filtered results.
	After : Finds items archived after a certain date.	Tip : If you want to use Query Search instead of Advanced Search, use the ArchiveDate: term and then build the search criteria.
	Within Range : Finds items archived between two chosen dates.	
Source Type	Is : Filters results that match the selected source type(s)	Select one or more sources as needed.
	Is Not : Excludes results that match the selected source type(s).	
Department	All Senders & Recipients : Filters data where both the sender and recipient belong to the selected department(s).	 Select Any or All operator and then click Select Department .
Note: This option is available if the Arctera Insight Surveillance service is enabled for a user.	Senders Only : Filters data where only the sender belongs to the selected department(s).	A dialog box opens where you can choose one or more departments to apply as a filter.

MESSAGE	ENTIRE MESSAGE	CONTAINS / DOESN'T CONTAIN
	Recipients Only : Filters data where only the recipient belongs to the selected department(s).	1. Use the Search Departments field to quickly locate a department by name.
		2. Toggle the Use Inheritance to include child departments of a selected parent department.
		3. Click Select All on Current Page to select every department visible on the current page. Else, select the required departments individually. The count of selected departments appears in the bottom of the dialog box.
		4. Click Select to confirm and apply them as a filter.
		If you want to reset your choices, click Clear Selection . If you want to close the dialog without saving changes, click Cancel .

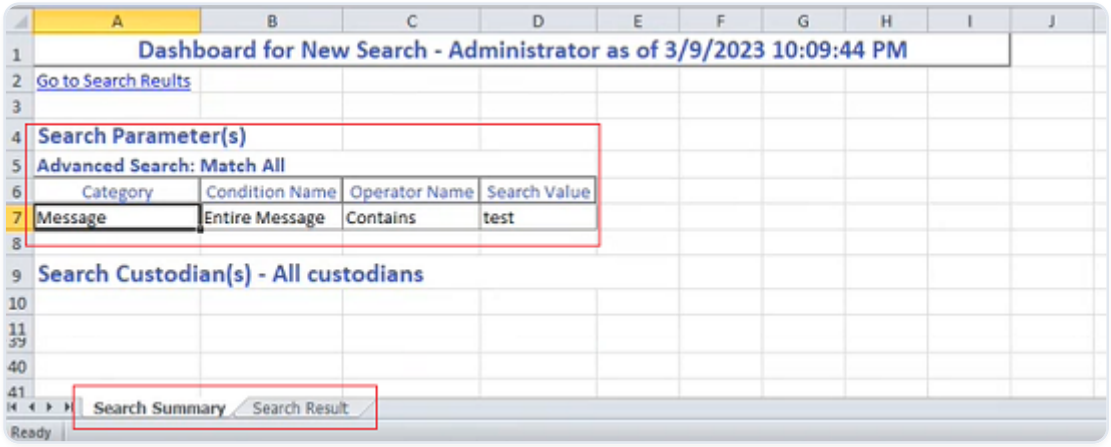
Important

- In Advanced Search, the search text input functionality is updated. In previous releases, when users were providing multiple text input with space, the default logical operator "AND" was getting applied. From now onwards, the default logical operator "OR" is getting applied to get user records.

This operator change from "AND" to "OR" is applied to all kind of searches. If users have previously used spaces while providing the search text inputs, their saved records (saved

searches/standard searches/Ongoing searches) will be impacted as the operator is changed from "AND" to "OR".

- Based on the selected attributes, when you export the search report, the **Search Summary**and**Search Report** is generated as shown in the sample image below.



1. To perform query search, specify the following inputs in the **Query Search** tab.

> “ ”

Note: Use the scroll bar to view the lengthy queries.

> “ ”

CUSTODIANS	**- SELECT ALL TO SEARCH ARCHIVES OF ALL OF THE CUSTODIANS THAT ARE ASSOCIATED WITH THE CASE.**
	- SELECT CUSTOM TO SEARCH ARCHIVES OF THE PARTICULAR CUSTODIANS. THE MANAGE BUTTON APPEARS. CLICK MANAGE TO OPEN THE ADD/REMOVE CUSTODIANS . EXPAND SELECTED CUSTODIANS TO VIEW THE CUSTODIANS SELECTED FOR THIS SEARCH. EXPAND MANAGE CUSTODIANS AND SELECT THE CUSTODIANS REQUIRED FOR THIS SEARCH. CLICK UPDATE TO ADD THESE SELECTED CUSTODIANS AS A SEARCH INPUT. THESE CUSTODIANS ARE LISTED UNDER THE SELECTED CUSTODIANS SECTION.
Query Search	Specify the search query by providing keywords.

Guidelines for specifying queries

The application supports query searches only if the following necessary conditions are followed. Else, the application displays corresponding errors.

CONDITIONS	EXAMPLES
-	The search criteria must be used after the operator and before the query text.
-	The AND/OR/NOT operators must be written in capital letters.
-	The AND/OR logical operator is missing.
-	The extra space(s) between operators is not allowed.
-	The space after bracket is not allowed.
-	The space before colon is not allowed.

> “ ”

Operator-specific conditions Spaces-specific conditions

> “ ”

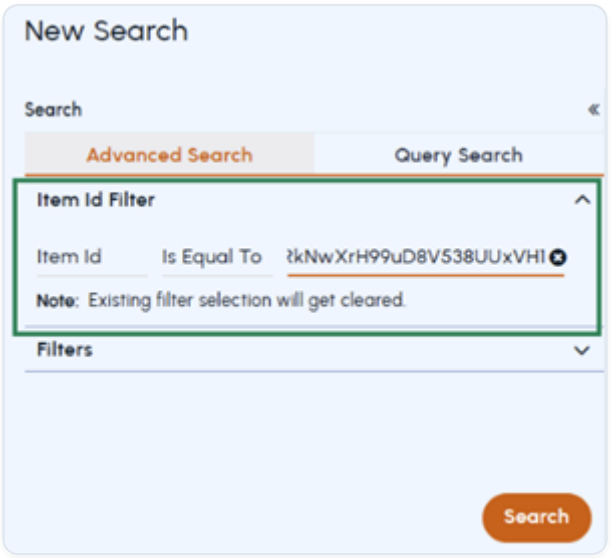
1. To search for the Insight Surveillance item using the Item ID Filter, perform the following steps:

   > “ ”

   Note: If you have a Insight Surveillance subscription and theShow Item ID Filterfeature is enabled in the Management Console, you can view theIdicon in the email preview pane as shown in the sample image below:

   > “ ”

Click the **Id**icon to copy the encrypted Item ID, then select**Advanced Filter**, expand**Item ID Filter**, choose**Is Equal To** , and paste the Item ID into the field as shown in the sample image below.



> “ ”

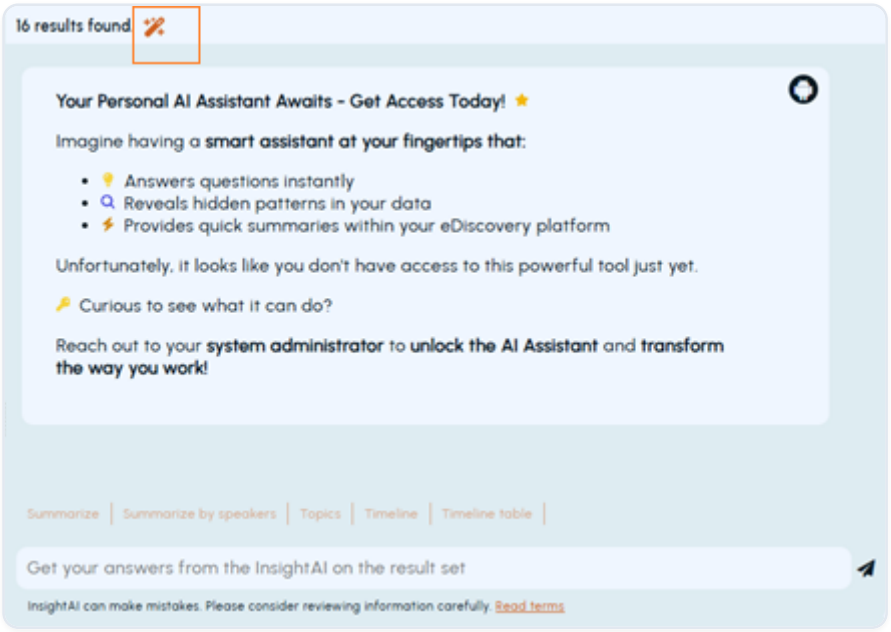
Note: When theItem ID Filteris selected, all other filters are cleared to return the exact matching item

1. Click **Search**.
2. (Optional) To create a context of this search, click the **InsightAI** icon as shown in the sample image below.

The **InsightAI** icon is visible only if this service is enabled for your account. Acting as your built-in AI assistant based on Open AI GPT-4.1 Nano model, it delivers faster, smarter, and more reliable answers from both new and saved searches by generating context from emails, collaboration messages, and files.

You can use the predefined prompts or enter your own prompt (query) to generate context.

Note: For any support about this service, contact your system administrator.



1. Click **Save Search**.

See Saving searches in Review sets and Research sets.

Saving searches as on-going and standard searches

If you have the required permissions you can save an Advanced Search or a Query Search. The roles that can create the on-going and the standard searches from the Investigations tab are as follows:

- My Mailbox node: All users.
- Managed Accounts node: Administrators and reviewers with the appropriate permissions.

The Advanced or the Query Search that is performed from the Investigations tab can be saved as a Standard Search or an On-going Search:

- A Standard Search retains the results that were captured when the search was created.
- With an On-going Search, any new items that meet the search criteria continue to be added after the search is created.

To save a search as on-going or standard search

1. Perform an Advanced Search or a Query Search in the **Investigations** tab.

See Creating a new search.

1. Click **Save Search**.
2. Complete the information in the **Save Search** dialog. The following table describes the options.

ENTER SAVED SEARCH NAME	ENTER A NAME FOR THE SAVED SEARCH. THIS NAME IS ALSO THE DEFAULT TAG NAME, IF YOU SELECT THE ON-GOING CHECK BOX.
On-going	Select to make the saved search an On-going Search.
	If you do not check this check box, Insight eDiscovery saves the search as a Standard Search.
	After you select the On-going check box, the application disables the Advanced ECA check box.
Tag Name	This option is available only if the On-going check box is selected.

ENTER SAVED SEARCH NAME	ENTER A NAME FOR THE SAVED SEARCH. THIS NAME IS ALSO THE DEFAULT TAG NAME, IF YOU SELECT THE ON-GOING CHECK BOX.
	Specify the name of a custom tag to assign to the associated items. By default Insight eDiscovery uses the saved search name as the tag name.
Legal hold	This option is available only if the On-going check box is selected.
	Select to place all item in the saved search on legal hold. Emails on legal hold are not deleted from the archive.
Send to Case	You have an option to select this check box. In case the Search is an Ongoing search, then the Keep copy in investigation check box is selected and disabled by default. In addition, a Case needs to be selected from the Cases drop-down. This check box allows you to send along with keeping a copy in investigation to the eDiscovery Tab. This preserves chain of custody by recreating the search in eDiscovery. The case gets moved to the eDiscovery > Research Set.

3. Click **OK** to save the search as follows:

   - If you have selected the **On-going**check box, the search is saved under**On-going Searches**.
   - Otherwise the search is saved under **Standard Searches**.

If you have selected the **Send to Case**check box, accordingly the case gets moved to the eDiscovery > Research Set. A copy is created in the On-going/Standard searches, if the**Keep copy in investigation** check box is selected or not.

Viewing previously executed but unsaved searches during an investigation

While investigating data references, you may often run a search and retrieve the data, but knowingly or unknowingly do not save it. In such scenarios, the application logs the search under *Investigation>Managed Accounts>Previous Searches* node. This allows you to refer to your previously executed but unsaved searches when needed. You can rerun the same search and save it for future investigative purposes.

To view previously executed but unsaved searches during an investigation

1. In the left navigation pane, select **Investigation**>**Managed Accounts**>**Previous Searches** node.

A list of previously executed but unsaved searches during investigation appears. Use the page navigation arrows to access cases displayed on other pages.

1. To retrieve the search result, click **Rerun Search**in the**Action** column of the row corresponding to the search you want to run again.
2. If needed, do the following:

   - Click **Save Search** for future investigative purposes.
   - Click **Send to Case**to send the review items retrieved in a search to one or more cases available in the**eDiscovery**Tab, while keeping a copy of items in the**Investigation** tab.

     > “ ”

     Note: Department Reviewers may encounter certain role-specific limitations. For details, SeeKnown limitations affecting the Department Reviewer role.; these are known, low-impact issues targeted for resolution in the next release.

     > “ ”

Updating on-going and standard searches

You can update the on-going and the standard searches from the Mailbox and the Managed Accounts nodes.

Updating on-going and standard searches from Mailbox

You can update the on-going and the standard searches to change the search name, to specify the new tag name, and to apply a legal hold on a searches. While updating the searches from the My Mailbox node, you cannot send the on-going and the standard searches to the cases available in the eDiscovery tab.

To update an on-going or a standard search from your mailbox

1. On the **Investigations**tab, select**My Mailbox**>**On-going Searches**or**Standard Searches** as required.
2. **To update the on-going search**, select an on-going search, and click**Update Search**.

Update the following information in the **Update Search** dialog box as required.

ENTER SAVED SEARCH NAME	CHANGE THE NAME FOR THE SAVED SEARCH IF REQUIRED.
Tag Name	You can modify the option only if the On-going check box is selected.
	Specify a new tag name. By default Insight eDiscovery uses the saved search name.
On-going	Ensure that this check box is selected so that you can view this search under the on-going search list.
	For an on-going search, new items that meet the search criteria continue to be added after the search is created.
Legal hold	This option is available only if the On-going check box is selected.
	Select to place all items in this on-going search on legal hold. Emails on legal hold are not deleted from the archive.
Save as new	Click Save as new to save the selected on-going search as a new search. The original saved search remains unchanged.

1. **To update the standard search**, select a standard search, and click**Update Search**.

Update the following information in the **Update Search** dialog box as required.

ENTER SAVED SEARCH NAME	CHANGE THE NAME FOR THE STANDARD SEARCH IF REQUIRED.
Tag Name	You cannot change the Tag Name while updating the standard search. You can modify the option only if the On-going check box is selected.
On-going	Ensure that this check box is not selected. You can select this check box only if you want to save this search as an on-going search.
Legal hold	You cannot change this option while updating the standard search. You can modify this option only if the On-going check box is selected.
Save as new	You cannot save the existing standard searches as a new standard search. This option remains disabled in case of updating the standard searches.

1. Click **Update** to save this updated search.

    - When the **On-going**check box is selected, the search is saved under the**On-going Searches** node.
    - Otherwise the search is saved under the **Standard Searches** node.

Updating an on-going or a standard search from Managed Accounts

You can update the on-going and the standard searches to change the search name, to specify the new tag name, and to apply a legal hold on a searches. While updating the searches from the Managed Accounts node, you can send the on-going and the standard searches to the cases available in the eDiscovery tab.

To update an on-going or a standard search from Managed Accounts

1. On the **Investigations**tab, select**Managed Accounts**.
2. Expand the **On-going Searches**node or the**Standard Searches** node, as required.

3. **To update the on-going search**, select an on-going search, and click**Update Search**.

Update the following information in the **Update Search** dialog box as required.

ENTER SAVED SEARCH NAME	CHANGE THE NAME FOR THE ON-GOING SEARCH IF REQUIRED.
Tag Name	You can modify the option only if the On-going check box is selected.
	Specify a new tag name. By default Insight eDiscovery uses the saved search name.
On-going	Ensure that this check box is selected so that you can view this search under the on-going search list.
	For an on-going search, new items that meet the search criteria continue to be added after the search is created.
Legal hold	This option is available only if the On-going check box is selected.
	Select to place all items in this on-going search on legal hold. Emails on legal hold are not deleted from the archive.
Save as new	Click Save as new to save the selected on-going search as a new search. The original saved search remains unchanged.
Send to Case	You have an option to select this check box. In case the Search is an on-going search, then the Keep copy in investigation check box is selected, but displayed as disabled by default. In addition, a Case needs to be selected from the Cases drop-down. This check box allows you to send along with keeping a copy in investigation to the eDiscovery Tab. This preserves chain of custody by recreating the search in eDiscovery. The case gets moved to the eDiscovery > Research Set.

1. **To update the standard search**, select a standard search, and click**Update Search**.

Update the following information in the **Update Search** dialog box as required.

ENTER SAVED SEARCH NAME	CHANGE THE NAME FOR THE STANDARD SEARCH IF REQUIRED.
Tag Name	You cannot change the Tag Name while updating the standard search. You can modify the option only if the On-going check box is selected. If you select the On-going check box, this standard search will be saved as the On-going search.
On-going	Select this option if you want to save the selected standard search as the on-going search. In this case, you can update the tag name and apply a legal hold to the items within the search.
	After you select this check box, the Advanced ECA option gets disabled.
Legal hold	You cannot change this option while updating the standard search. You can modify this option only if the On-going check box is selected.
Advanced ECA	Select this option if you want to move (save) the selected standard search under the Advanced ECA node.
	After you select this check box, the On-going and the Legal Hold options get disabled.
Send to Case	Select this check box if you want to send the selected standard search to the required cases on the eDiscovery tab.
	Select the case from the Cases drop-down. This check box allows you to send the selected search, along with keeping a copy in investigation, to the eDiscovery Tab. This preserves chain of custody by recreating the

ENTER SAVED SEARCH NAME	CHANGE THE NAME FOR THE STANDARD SEARCH IF REQUIRED.
	search in eDiscovery. The case gets moved to the eDiscovery > Research Set.
Save as new	You cannot save the existing standard searches as a new standard search. This option remains disabled in case of updating the standard searches.

1. Click **Update** to save this updated search.

Exporting a summary report of searched items

In Investigations, any user who has access to searches can export the printable reports of emails. You can export all emails and a searched emails summary as a zip file for further use.

It is important to understand the difference between exporting reports and exporting item records. When you generate and export reports, the metadata displayed on the details pane is shown in the excel file. However, when you export items, the actual item files are downloaded.

To export a report of searched items

1. In the **Investigations**pane, expand**My Mailbox**or**Managed Accounts**.
2. Search for and select any new search, on-going search, or standard search for which you want to export a report.

   > “ ”

   Note: In theAdvanced Searchtab, you can refine your criteria to search for records. Click the plus icon to add new criteria. Click the minus icon to remove the corresponding criteria. SelectMatch Allto find records that meet all specified criteria. SelectMatch Anyto find at least one specified criterion.

   > “ ”

3. To export emails, click Export, and then do any of the following:

- To export and print records on the current page, click the **Export**icon, and select**Export current page**.
- To export and print selected records, select the records, click the **Export**icon, and select**Export selected emails**.
- To export and print all records, click the **Export**icon, and select**Export all emails**.

4. To export the searched email summary, click the **More Options**icon, and select**Export Report**.

Application downloads the zipped report to your **Downloads** folder. You can extract, save, and share this excel report with the concerned persons. This report specifies the date and time when the report is generated. It can contain a maximum of 100 Thousand records in a single file. If numbers of records exceeds 100 Thousand, application generates multiple files and downloads reports as a single zipped folder.

Deleting searches

You can delete a single search at a time.

To delete a saved search (Investigations tab)

1. On the **Investigations** tab, do any of the following:
   - Expand **My Mailbox**to select search from the**On-going searches**or the**Standard searches** node.
   - Expand **Managed Accounts**to select search from the**On-going searches**,**Standard searches**, or the**Advanced ECA** node.
2. Search for and select the Search you want to delete.

The right-hand pane displays emails, collaboration messages, and files included in the search result.

1. Click **Delete Saved Search**.

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

1. Click **Yes**to complete the operation or click**No** to cancel it.

About Hit Highlighting

Hit highlighting visually marks important terms within the item preview pane to quickly identify relevant content. These terms include the terms matched by your search criteria as well as terms in any associated tags.

Highlighting applies to the subject line, message body, attachment names, and the text or HTML preview of attachments. Search terms are highlighted in *orange*, while tags are highlighted in*green*. You can hover over a highlighted term to identify whether it originated from a query or a tag.

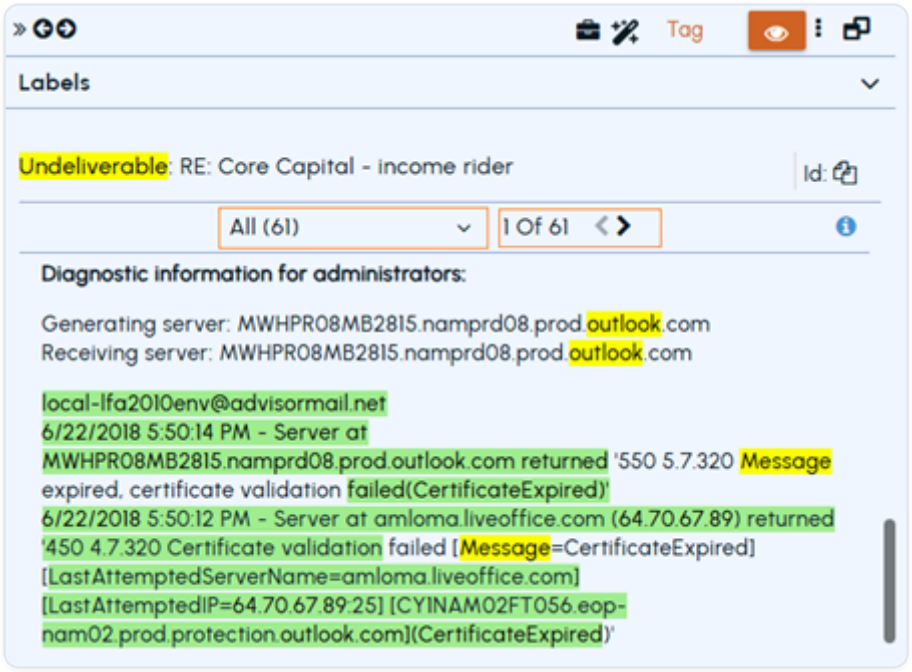
To help you review content efficiently, the preview pane includes a drop-down list showing all matched terms along with their occurrence counts. You can select *All* to view every highlighted term or choose a specific term to focus only on its instances. This targeted highlighting enables faster review of search results, especially when navigating through large message bodies or attachments.

To understand hit highlighting precisely, refer to the following scenario.

1. Create a new search or open an existing one by performing one of the following actions:
    - On the **Investigation**tab, expand**Managed Accounts**and click**New Search** ; or select an existing search from previously created searches, *ongoing searches, standard searches, or advanced ECA searches*.
    - On the **eDiscovery**tab, click**Cases**, search for and select a case. The selected case appears under Cases. Click**New Search** to create a new one, or expand *Research Sets*or*Review Sets* to select an existing search.
2. Use *Advanced Search*or*Query Search* to define your criteria for filtering relevant emails, collaboration content, or files. Click **Search**.

The filtered items (emails, collaboration messages, and files) in the items grid.

1. From the items grid, click the item you want to review. The selected item opens in the preview pane on the right.
2. In the preview pane, click the drop-down arrow to view a list of matched terms and the number of occurrences for each term.



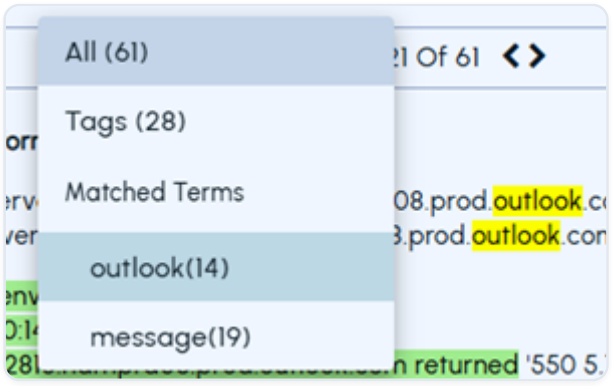
- Use the previous and next arrows to navigate between term hits in the message body.

  > “ ”

  Note: Though highlighting applies to the subject line, message body, attachment name, and the text or HTML preview of attachments, navigation is only available within the message body content.

  > “ ”

- Select *All* to view all highlighted terms, or select a specific term to highlight only its occurrences.



Capabilities

- Supports stop words and special characters

- Handles multi-byte characters
- Highlights terms across line breaks
- Applies highlighting in Native Viewer
- Works with tenants where stop word indexing is enabled
- Supports proximity-based searches
- Provides navigation between highlighted terms

Known Limitations

- Does not highlight search terms with leading or trailing special characters
- Counts/includes stop words in highlights within Native Viewer
- Does not support highlighting in Query Search
- Cannot highlight non-visible metadata such as image information or indexed item metadata

Working with searched emails

This section describes the tasks that a user can perform with the searched emails.

Applying tags and legal hold to emails

To apply tags and legal hold to emails

1. On the **Investigations** tab, navigate to any of the following locations, as required:
   - **Managed Accounts**>**New Search**.
   - **Managed Accounts**>**On-going Searches**.
   - **Managed Accounts**>**Standard Searches**.
2. Create a new search or select the existing search in which you want to tag the items.

The application displays the searched items in the right pane.

1. Set the filter options and click **Apply** to view the filtered items.
2. In the right pane, on the **Emails** tab, select one or more emails to which you want to apply tags.

> “ ”

Note: Before you apply tags to the items, you can view the previously applied tags of the items in the preview pane. However, you need to select only one item at a time to view the tags. In the following sample image, you can see the previously applied tags and retention tags to the email in theEmailstab.

> “ ”

3. On the action menu, click **Tag** , and do any of the following as required.
   - To tag all the items in the search, click **Tag all emails**.
   - To tag all the items in the current page, click **Tag current page**.
   - To tag only the selected items, click **Tag selected emails**.
4. In the **Add Tag** dialog box, specify the following:

TAG NAME	ENTER A NEW UNIQUE TAG NAME.
Comments	Provide a comment or a description for the tag name.
Legal Hold	Select this check box if you want to apply the legal hold on the emails.
Select retention Tag	Instead of applying a new tag, you can apply the retention tags that are created in Arctera Insight Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply.
	After you select this option, the application disables the Tag Name field.

5. Click **Tag**.

After you apply tags to the emails, these tagged emails are available under the respective tags under the **Tags** node.

Applying labels to emails

To help organize your work you can apply labels to the emails. Labels are applied to emails typically to mark them as exempt from the review process.

To apply a label to emails

1. On the **Investigations** tab, create a new search or select the searches from the On-going searches or Standard searches node.
2. Perform advanced search or query search to get the expected items. See Performing Advanced Search and Query Search.

The application displays result.

1. On the **Emails** tab, select the check box for one or more emails to which you want to apply labels.
2. On the action menu, click **Label**.
3. In the **Add/Remove Labels** dialog box, select the labels you want to apply to the emails.

You can clear the labels if these are not required anymore. In case you have selected multiple emails, the **Add/Remove Labels** dialog box shows applied level status as follows:

- The check box that is not selected yet means this label is not at all applied to the selected emails.
- The check box with the dash mark means the label is applied to some of the selected emails, but not applied to all the selected emails.
- The check box with the tick mark means the label is applied to all the selected emails.

1. Select the required labels, and click **Apply Changes**.

After you apply labels to the emails, these labeled emails are available under the respective labels under the **Labels** node.

1. To ensure if the label is applied to the email, select the email to view its details in the right pane, and expand **Labels**.

You can click any label in the **Labels**popup to navigate to the respective label under the**Labels** node. See the sample image below

Exporting searched emails

You can export a batch of emails and share it with the concerned authority for the intended use. To secure the information, you can use the AES-256 encryption while creating a batch of emails for export. After exporting the batch of emails, you can download and share it with others.

To export a batch of emails

1. On the **Investigations** tab, create a new search or select the searches from the On-going searches or Standard searches node.
2. Perform advanced search or query search to get the expected items. See Performing Advanced Search and Query Search.

The application displays result.

1. On the **Emails**tab, select the check box for one or more emails, and click**Export**. Do any of the following:
    - Click **Export current page** export emails that are available on the current page.
    - Click **Export selected emails** to export only the selected emails.
    - Click **Export all emails** to export all the available emails within the search.
2. In the **Export Options** dialog box, specify the following:

MESSAGE FORMAT	SELECT THE APPROPRIATE MESSAGE FORMAT. BY DEFAULT, THE PST FORMAT IS SELECTED. THE AVAILABLE MESSAGE FORMATS ARE\:
	- CLEARWELL
	- EML
	- EML WITH EDRM
	- PST WITH EDRM
	- MSG WITH EDRM
	- FTI-RINGTAIL
	- EDRM ONLY
	- PST
	- ORIGINALEDRM IF YOU SELECT THIS OPTION, THE EXPORTED FILE INCLUDES EMAILS IN BOTH MSG AND EML FORMATS, ALLOWING YOU TO WORK WITH THE EMAILS IN THE FORMAT THAT BEST SUITS YOUR NEEDS. BESIDES THIS, THE EXPORTED FILE INCLUDES ADDITIONAL FILES, NAMELY - EDRMXML.XML AND HTMLREPORT.HTML IN THEIR ORIGINAL FORMATS. THESE FILES FACILITATES A SMOOTH TRANSFER OF ELECTRONICALLY STORED INFORMATION (ESI) BETWEEN DIFFERENT SOFTWARE PROGRAMS DURING THE ELECTRONIC DISCOVERY PROCESS.
	- ORIGINAL IF YOU SELECT THIS OPTION, THE EXPORTED FILE INCLUDES EMAILS IN BOTH MSG AND EML FORMATS, ALLOWING YOU TO WORK WITH THE EMAILS IN THE FORMAT THAT BEST SUITS YOUR NEEDS.
	NOTE: THEORIGINALEDRMANDORIGINALMESSAGE FORMATS ARE AVAILABLE TO THE USERS THAT ARE LISTED IN THECONFIGURATION_OVERRIDENTABLE IN THE ARCTERA INSIGHT ARCHIVING DATABASE. IF YOU WANT TO AVAIL

MESSAGE FORMAT	SELECT THE APPROPRIATE MESSAGE FORMAT. BY DEFAULT, THE PST FORMAT IS SELECTED. THE AVAILABLE MESSAGE FORMATS ARE\:
	- CLEARWELL
	- EML
	- EML WITH EDRM
	- PST WITH EDRM
	- MSG WITH EDRM
	- FTI-RINGTAIL
	- EDRM ONLY
	- PST
	- ORIGINALEDRM IF YOU SELECT THIS OPTION, THE EXPORTED FILE INCLUDES EMAILS IN BOTH MSG AND EML FORMATS, ALLOWING YOU TO WORK WITH THE EMAILS IN THE FORMAT THAT BEST SUITS YOUR NEEDS. BESIDES THIS, THE EXPORTED FILE INCLUDES ADDITIONAL FILES, NAMELY - EDRMXML.XML AND HTMLREPORT.HTML IN THEIR ORIGINAL FORMATS. THESE FILES FACILITATES A SMOOTH TRANSFER OF ELECTRONICALLY STORED INFORMATION (ESI) BETWEEN DIFFERENT SOFTWARE PROGRAMS DURING THE ELECTRONIC DISCOVERY PROCESS.
	- ORIGINAL IF YOU SELECT THIS OPTION, THE EXPORTED FILE INCLUDES EMAILS IN BOTH MSG AND EML FORMATS, ALLOWING YOU TO WORK WITH THE EMAILS IN THE FORMAT THAT BEST SUITS YOUR NEEDS.
	NOTE: THEORIGINALEDRMANDORIGINALMESSAGE FORMATS ARE AVAILABLE TO THE USERS THAT ARE LISTED IN THECONFIGURATION_OVERRIDENTABLE IN THE ARCTERA INSIGHT ARCHIVING DATABASE. IF YOU WANT TO AVAIL

MESSAGE FORMAT	SELECT THE APPROPRIATE MESSAGE FORMAT. BY DEFAULT, THE PST FORMAT IS SELECTED. THE AVAILABLE MESSAGE FORMATS ARE\:
	- CLEARWELL
	- EML
	- EML WITH EDRM
	- PST WITH EDRM
	- MSG WITH EDRM
	- FTI-RINGTAIL
	- EDRM ONLY
	- PST
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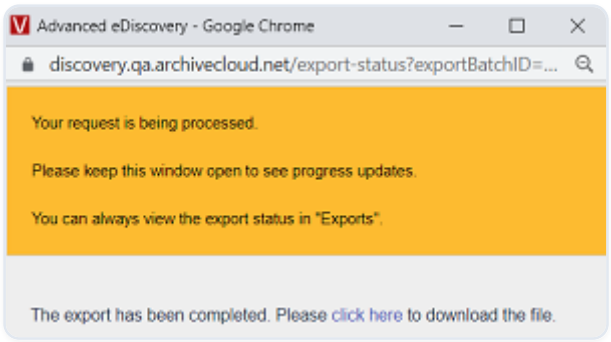
3. Click **Export**.

> “ ”

Note: The exported batch can either gets downloaded as a single or multiple file segments.

> “ ”



4. Click **Click here** to download the exported batch of emails.

The

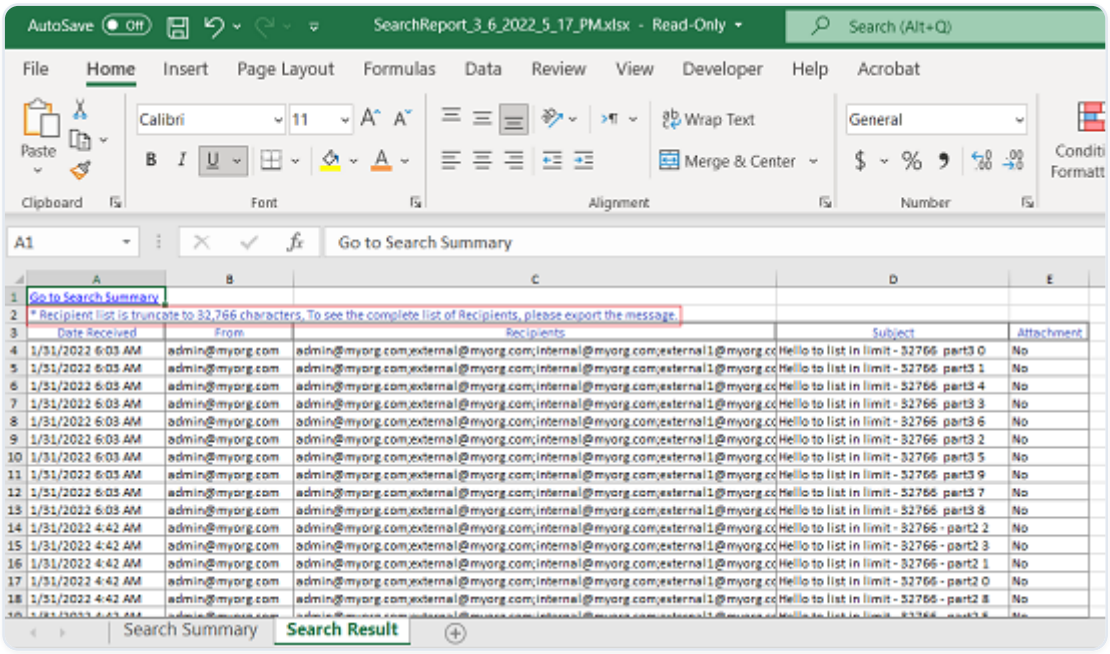
1. To confirm the status of batch export, on the **Investigations**tab, select**Exports**.

Exporting a search summary report for emails

To export a search summary report for emails

1. On the **Investigation** tab, select the search for which you want to export a summary report.
2. Click **New Search**to create a new search. Else, expand**On-going Searches**or**Standard Searches** to select existing search.
3. On the **Emails**tab, click the**More Actions**icon, and click**Export Report**.

The application downloads the summary report (.xlsx) of the emails within the search as a zipped (.zip) folder. A sample report is shown below. The report comprises of two sheets.



Note: TheSearch Summarysheet displays details such as Search Parameters and Custodians. TheSearch Resultsheet displays details such as Date Received, From, Recipients, Subject, and Attachments. The recipient column in this summary report includes recipients mentioned in the To, CC, and BCC fields. If the list of recipients is longer than 32766 characters, the application truncates the list. The report displays a note that -Recipient list is truncate to 32,766 characters, To see the complete list of Recipients, please export the message.In such scenario, to view the complete list of recipients, you need to export the individual message.

Reassigning emails

To understand email reassigning, See About Mail Reassignment.

Hiding and unhiding emails

Administrators can use the Hide Me and the Unhide Me options to hide and unhide emails from users respectively. In Personal.cloud and Mobile Web Access, administrators cannot search the emails with the hidden state. However, in Insight eDiscovery, administrators can search and view these hidden emails.

To hide emails

1. Under **Managed Accounts**, conduct a**New search**.
2. Perform advanced search or query search to get the expected items. See Performing Advanced Search and Query Search.
3. Select the emails that you want to hide.
4. Click **Hide/Unhide me** , and select an option to specify which emails to hide or unhide.
5. Select the option to **Hide selected emails**or**Hide email in current page**.

The confirmation dialog box appears informing that action has been executed successfully, refresh search to see the output of this action.

> “ ”

Note: A maximum of 300 emails can be hidden in a single transaction. The Hide emails dialog box appears informing that the emails are hidden, and cannot be browsed by end-users. It may take up to 60 minutes to hide the emails from appearing in the end-user search results.

> “ ”

1. Click **Yes**.
2. Execute the same search again.

The hidden emails are marked with a gray background, and the **Hide** icon appears in the last column.

To unhide emails

1. Under **Monitored Accounts**, conduct a**New search**.
2. Perform advanced search or query search to get the expected items. See Performing Advanced Search and Query Search.
3. Select the emails that you want to unhide.
4. Click the **Hide/Unhide me** icon, and select the emails that are hidden previously.
5. Select the option to **Unhide selected emails**or**Unhide email in current page**.

The confirmation dialog box appears informing that action has been executed successfully, refresh search to see the output of this action.

> “ ”

Note: A maximum of 300 emails can be unhidden in a single transaction. The Unhide emails dialog box appears informing that the emails are unhidden, and cannot be browsed by end-users. It may take up to 60 minutes to unhide the emails from appearing in the end-user search results.

> “ ”

1. Click **Yes**.
2. Execute the same search again.

The unhidden emails are no longer marked with a gray background, and the **Hide me** icon disappears from the last column.

Deleting emails permanently

Administrators can use the Delete option to permanently delete emails from users. In Personal.cloud and Mobile Web Access, administrators or users cannot search the emails that have been deleted.

> “ ”

Note: For information on how to enablePrivilege Deleteto company level, seeConfiguring archive optionsin theManagement Console Help. For information on how to enablePrivilege Deleteto administrators, seeEditing the built-in administrator rolesin theManagement Console Help.

> “ ”

To delete emails

1. Under **Managed Accounts**, navigate to**New search** , and then conduct a search.
2. If required, select the check box for one or more emails.
3. Click the **Delete** icon, and then select an option to specify which emails to delete.

> “ ”

Note: A maximum of 300 emails can be deleted in a single transaction. The Permanently delete emails dialog box appears informing that once emails are deleted, they cannot be recovered or accessed and that this is permanent and irreversible action. It may take up to 60 minutes for deleted emails to stop appearing in the end-user search results.

> “ ”

4. Click **Yes**.

The confirmation dialog box appears informing that action has been executed successfully.

1. To check the status of the deleted emails, navigate to **Deleted items**under**Managed Accounts** , and review the list of emails.

> “ ”

Note: A list shows the deleted emails in chronological order from most recent to older. You can sort by email Date or Date Added (default).

> “ ”

The status of the deleted email can be:

- Deleted \- the email has been deleted.
- Queued \- the email is queued to be deleted.
- On Legal Hold \- the email is on legal hold status, and it cannot be deleted.

The email on legal hold has Legal hold tag, Legal hold search, or Legal hold Custodian in a Case applied. To delete an email marked on legal hold, first, remove any applicable legal hold that has been previously applied .

Working with searched collaboration messages

In Insight eDiscovery, you can collect the Microsoft Teams data. To view and review the Microsoft Teams specific communication, you can access the Collaboration tab after creating a search. This tab is visible only if -

- The Microsoft Teams service is enabled

- The Microsoft Teams collector is configured

After executing a search, the Collaboration tab displays Chats or Channel conversations that matches with the Search criteria applied in the left pane. As the icons of the Chats and the Channel conversations are different, you can easily distinguish between the Chat and Channel messages. You can download the images and the attachments used in the Chat and Channel conversations.

To get a full context of the conversation, you can view the events, reactions, and link previews in the messages. To easily distinguish among the participants in the conversation, the participant icons are highlighted in different color.

When you search a term or a text in a conversation, it is highlighted in a different color for easy identification.

Searching collaboration messages during investigation

You can search and view the collaboration messages if the Microsoft Teams service is enabled and the archive collector is configured for you.

To search collaboration messages during investigation

1. Select the **Investigations** tab, and then select the node where you want to perform the new search:
    - To search your own mailbox select **My Mailbox > Mailbox**, or select**My Mailbox > New Search**.
    - To search a single managed account, select **Managed Accounts > Accounts** and click the required account.
    - To search one or more of your managed accounts select **Managed Accounts > New Search**.
2. Perform advanced search or query search to get the expected items. See Performing Advanced Search and Query Search.
3. Click **Search**.

The search result appears.

1. Click **Save Search**.

See Saving searches in Review sets and Research sets.

Applying tags and legal hold to collaboration messages

To help organize your work you can tag emails with custom tags of your own choice, which are visible only to you. You can also tag messages with a Retention tags (also called as managed tags), if you have any of these available to you. Retention tags are created in the Arctera Insight Management Console, under the My Config > Managed Tags node. For more information on managed tags, see the Archive Administration Help.

To apply a tag and legal hold to collaboration messages

1. On the **Investigations** tab, create a new search or select the searches from the On-going searches, Standard searches, or Advanced ECA nodes.
2. Perform advanced search or query search to get the expected items. See Performing Advanced Search and Query Search.

The application displays result.

1. On the **Collaboration** tab, select the check box for one or more messages (chats) that you want to tag.
2. On the action menu, click **Tag** , and do any of the following as required.
   - To tag only the selected messages, click **Tag selected messages**.
   - To tag all the messages in the search, click **Tag all messages**.
3. In the **Add Tag** dialog box, specify the following:

TAG NAME	ENTER A NEW UNIQUE TAG NAME.
Comments	Provide a comment or a description for the tag name.
Legal Hold	Select this check box if you want to apply the legal hold on the messages.
Select retention Tag	Instead of applying a new tag, you can apply the retention tags that are created in Arctera Insight Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply.

4. Click **Tag**.

After you apply tags to the collaboration messages, these tagged messages are available under the respective tags under the **Tags** node.

1. To ensure if the tag is applied to the message, select the message to view its details in the right pane. Hover over the black Tag icon to view all the tags applied to this message.

You can click the black Tag icon to view all the applied tags in the **Tags** popup.

You can click any tag in the **Tags**popup to navigate to the respective tag under the**Tags** node.

Applying labels to collaboration messages

To help organize your work you can apply labels to the collaboration messages. Labels are applied to collaboration messages typically to mark them as exempt from the review process.

To apply a label to collaboration messages

1. On the **Investigations** tab, create a new search or select the searches from the On-going searches or Standard searches node.
2. Perform advanced search or query search to get the expected items. See Performing Advanced Search and Query Search.

The application displays result.

1. On the **Collaboration** tab, select the check box for one or more messages (chats) to which you want to apply labels.
2. On the action menu, click **Label**.
3. In the **Add/Remove Labels** dialog box, select the labels you want to apply to the messages.

You can clear the labels if these are not required anymore. In case you have selected multiple collaboration messages, the **Add/Remove Labels** dialog box shows applied level status as follows:

- The check box that is not selected yet means this label is not at all applied to the selected messages.
- The check box with the dash mark means the label is applied to some of the selected messages, but not applied to all the selected messages.
- The check box with the tick mark means the label is applied to all the selected messages.

1. Select the required labels, and click **Apply Changes**.

After you apply labels to the collaboration messages, these labeled messages are available under the respective labels under the **labels** node.

1. To ensure if the label is applied to the message, select the message to view its details in the right pane. Hover over the blue Label icon to view all the labeled messages.
    - To view all the applied labels in the **Labels** popup, click the blue-colored Label icon.
    - You can click any label in the **Labels**popup to navigate to the respective label under the**Labels** node.

Printing MS Teams messages to PDF during investigation

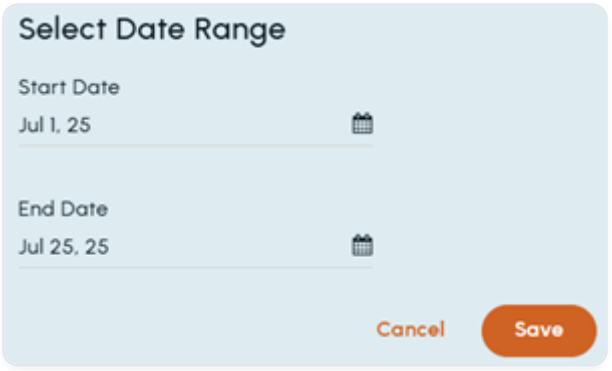
You can print collaboration messages collected from the *MS Teams*collectors using the Print to PDF feature. This feature is exclusive to*MS Teams* collaboration messages and is not supported for messages collected from other archive collectors. It is available when you select the collected MS Teams item and preview its content no matter the item is collected and accessed from the following nodes:

- *Managed Accounts* (MS Teams messages that are collected during new searches, as well as when examining items from previous searches, ongoing searches, standard searches, and advanced ECA searches.)
- *Labels-Legal Holds-Tags-Retention Tags*

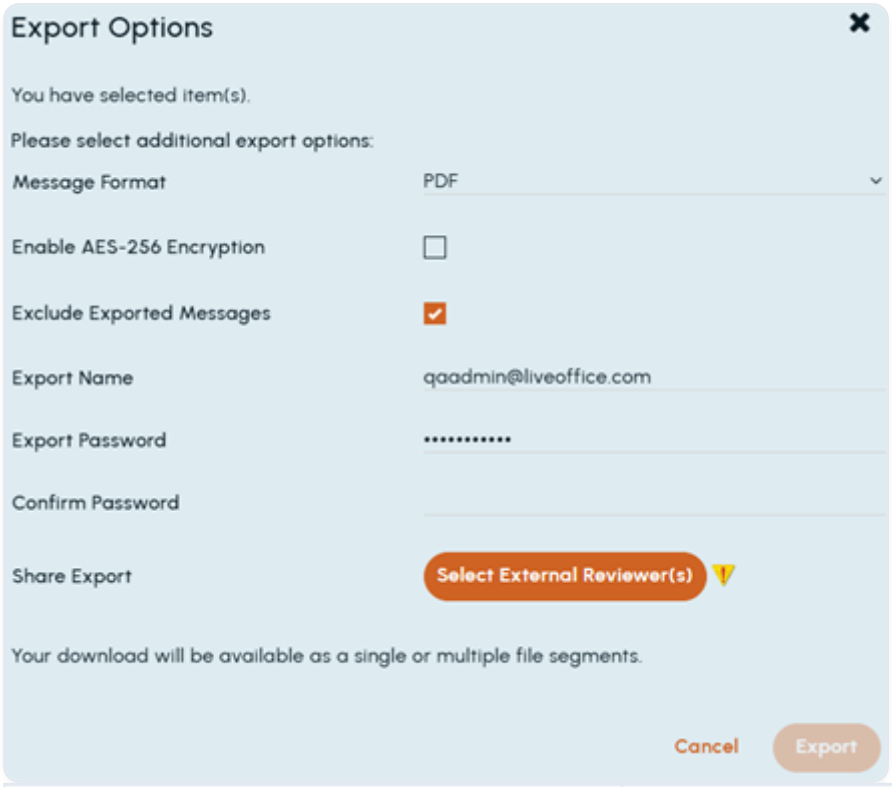
To print MS Teams messages to PDF during investigation

1. From the **Investigations** tab, select the required search or node (Labels, Legal Hold, Tags, or Retention Tags).
2. On the **Collaboration** tab, select the collaboration message you want to print to PDF.
3. Click the **More options**icon and select**Print To PDF**.

The application displays the **Select Date Range** as shown in the following sample image.



1. Specify the date range and click **Save**.
2. In the **Export Options** dialog box, specify the following details:



MESSAGE FORMAT	THE PDF FORMAT IS SELECTED BY DEFAULT.
Enable AES-256 Encryption	Select this check-box if you want to secure the access of the downloaded export batch.
Exclude Exported Messages	Select this option to exclude the exported messages.
Export Name	Provide the name for the batch you want to export. By default, it takes the Search Name. You can change it if required.

MESSAGE FORMAT	THE PDF FORMAT IS SELECTED BY DEFAULT.
Export Password	Enter the password that you want end user to provide when they access this exported batch of messages.
Confirm Password	Repeat the same password for confirmation.
Share Export	Click Select Admin(s) to choose the recipients of this batch export and click Update .
	Note: You need to manually share the Export Password with the administrators and follow all the security specific rules of the organization.

3. Click **Export**.

A browser appears showing the progress. Upon completion, Click the **Click here** link to download the PDF.

Exporting collaboration messages

You can export a batch of collaboration messages and share it with the concerned authority for the intended use. To secure the information, you can use the AES-256 encryption while creating a batch of collaboration messages for export. After exporting the batch of messages, you can download and share it with others.

To export a batch of collaboration messages

1. On the **Investigations** tab, create a new search or select the searches from the On-going searches or Standard searches node.
2. Perform either an Advanced Search or a Query Search to search for the Collaboration messages. See Searching collaboration messages during investigation.

The application displays result.

1. On the **Collaboration**tab, select the check box for one or more messages (chats) to which you want to apply labels, and click**Export**. Do any of the following:
   - Click **Export selected messages** to export only the selected messages.

- Click **Export all messages** to export all the available collaboration messages within the search.
- Click **Export conversation** to export all the conversations for a selected message within a user specified date range.

It helps you to understand the context of the conversation for review purpose.

1. In the **Export Options** dialog box, specify the following:

MESSAGE FORMAT	SELECT THE APPROPRIATE MESSAGE FORMAT FOR BATCH EXPORT. OPTIONS INCLUDE\:
	- JSON NOTE: THIS FORMAT IS SELECTED BY DEFAULT. WHEN YOU SELECT JSON FORMAT FOR EXPORT, FILES ARE DOWNLOADED IN THEIR ORIGINAL FORM, AND NOT AS JSON.
	- EDRM ONLY
Enable AES-256 Encryption	Select this check-box if you want to secure the access of the downloaded export batch.
Export Name	Provide the name for the batch you want to export. By default, it takes the Search Name. You can change it if required.
Export Password	Enter the password that you want end user to provide when they access this exported batch of messages.
Confirm Password	Repeat the same password for confirmation.
Generate Azure SAS URL	**Note:** Users can see this button only if theExport to Azure private storage locationfeature in the Arctera Insight Management Console is enabled for them. Users can export items to their private Azure Blob storage location.
	Click Generate Azure SAS URL to get the Azure Blob SAS URL to access the location and save it for future use.

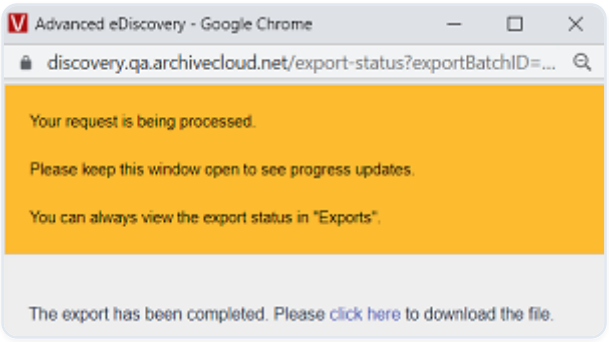
MESSAGE FORMAT	SELECT THE APPROPRIATE MESSAGE FORMAT FOR BATCH EXPORT. OPTIONS INCLUDE\:
	- JSON NOTE: THIS FORMAT IS SELECTED BY DEFAULT. WHEN YOU SELECT JSON FORMAT FOR EXPORT, FILES ARE DOWNLOADED IN THEIR ORIGINAL FORM, AND NOT AS JSON.
	- EDRM ONLY
	For security reasons, the application does not show this URL the next time. However, if the SAS URL is misplaced for any reason, click Generate Azure SAS URL again to generate a new SAS URL and save it securely.
	After you click Export on the Export Options dialog box, all the selected items are exported to the Azure private storage location. You can use Microsoft Storage Explorer to access the exported items.
Share Export	Click Select Admin to choose the recipients of this batch export and click Update .
	Note: You need to manually share the Export Password with the administrators and follow all the security specific rules of the organization.

2. Click **Export**.

> “ ”

Note: The exported batch can either gets downloaded as a single or multiple file segments.

> “ ”



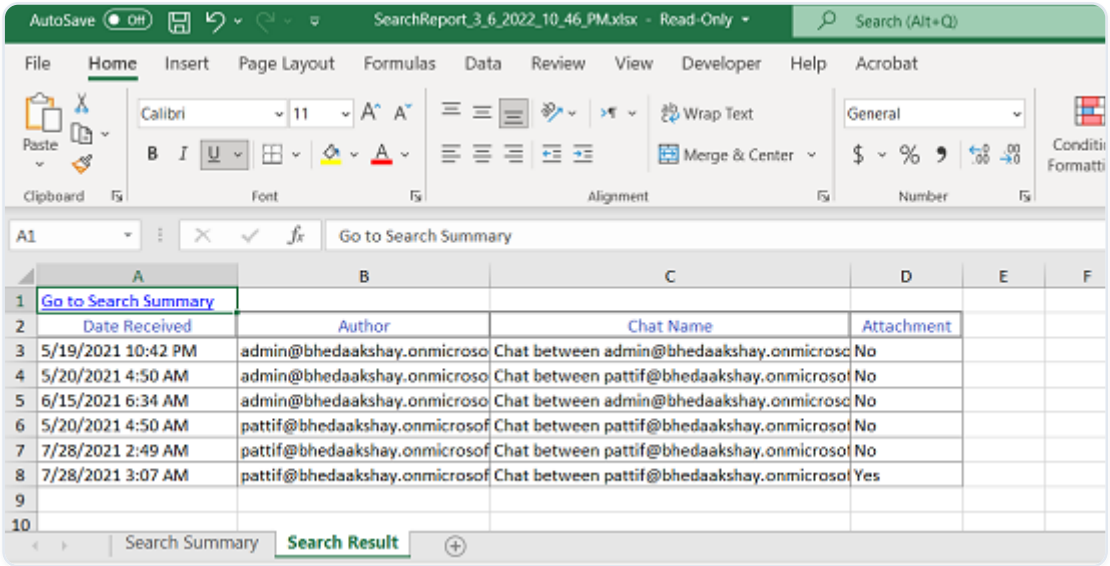
3. Click **Click here** to download the exported batch of messages.
4. To confirm the status of batch export, on the **Investigations**tab, select**Exports** and check the status of your export.

Exporting a search summary report for collaboration messages

To export a search summary report for collaboration messages

1. On the **Investigation** tab, select the search for which you want to export a summary report.
2. Click **New Search**to create a new search. Else, expand**On-going Searches**or**Standard Searches** to select existing search.
3. On the **Collaboration**tab, and click**Export Report**.

The application downloads the summary report (.xlsx) of the collaboration messages within search as a zipped (.zip) folder. A sample report is shown below. The report comprises of two sheets.



Note

- **Search Summary** : This sheet displays details such as *Search Parameters*and*Custodians*.

- **Search Result** : This sheet displays details such as *Date Received*,*Author*, Chat Names (list of people involved in chat), and*Attachments*.
- The **Chat Name** column displays the email addresses of message recipients involved in a chat. This column supports up to 100 characters; any text beyond this limit is truncated in the exported report.

Working with searched files

In Insight eDiscovery, you can collect the data from OneDrive for Business and Audio-Video archive collectors. To view and review the files, you can access the Files tab after creating a search. This tab is visible only if -

- The OneDrive for Business service is enabled and the OneDrive for Business collector is configured.
- The Audio-Video service is enabled and the Audio-Video collector is configured.

Working with Audio-Video files

Insight eDiscovery supports managing the archived audio-video files. The audio-video files can be collected from the Audio-Video collectors if these services are enabled for you.

The currently supported formats are as follows:

- Video Formats: MP4, MOV, WebM, MPEG-4, and OGG
- Audio Formats: MP3, WAV, OGG, AAC, and WebM

After executing a search, the audio-video files are listed under the Files tab. When you select the audio-video file, its details are displayed in the File Metadata pane.

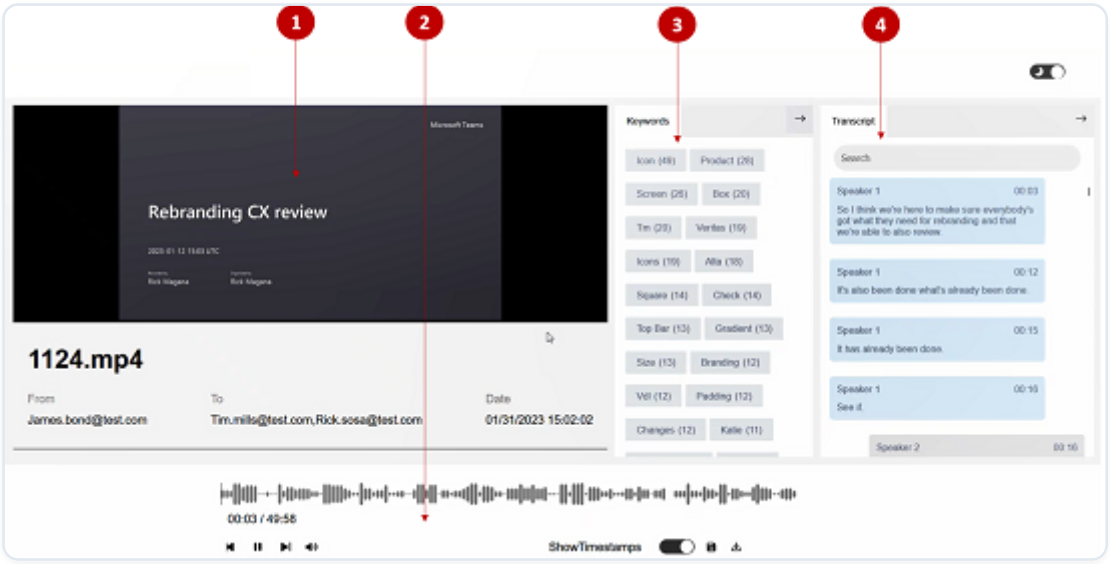
The AI Transcription of the audio-video content appears. Unlike other file formats, you cannot directly view the audio or video files in the native format in the File Metadata pane.

Expand the Labels section to view the labels applied to the file.

To view the audio-video file in its native format

- Search for and select the file, and do any of the following:
  - Click the **Download** icon to save the file on your local computer.
  - Click the **Native viewer**icon available in the top-right corner of the**File Metadata** pane.

The selected file opens in a separate window in its native format.



1\. Native view

This panel displays the audio-video file in its original format.

2\. Control panel

This panel provides options to rewind, forward, pause, and control audio level of the file. In addition, it provides options to download, save, and view/hide time stamps.

3\. Keywords

This panel lists the keywords and the exact count of those keywords in the audio-video content. Click the keyword to navigate to the respective content in the audio-video file and play from that point onwards.

4\. AI Transcript

This panel displays the AI transcript of the audio-video content. to navigate to the respective content in the audio-video file and play from that point onwards.

Like other files, you can apply tags and labels to the audio-video files. You can move these files to production sets and export to the intended user. Only the AI transcripts of these files are exportable in PDF format. You can apply annotations and redactions to these PDF files for review purposes. Refer to the sample image of exported AI transcript file.

Applying tags and legal hold to files

To apply tag and legal hold to files

1. On the **Investigations** tab, navigate to any of the following locations, as required:

- **Managed Accounts**>**New Search**.
- **Managed Accounts**>**On-going Searches**.
- **Managed Accounts**>**Standard Searches**.

2. Create a new search or select the existing search in which you want to tag the files.

The application displays the searched items in the right pane.

1. Set the filter options and click **Apply** to view the filtered files.
2. In the right pane, on the **Files** tab, select one or more files to which you want to apply tags.

> “ ”

Note: Before you apply tags to the files, you can view the previously applied tags of the files in the preview pane. However, you need to select only one file at a time to view the tags. In the following sample image, you can see the previously applied tags and retention tags to the file in theFilestab.

> “ ”

3. On the action menu, click **Tag** , and do any of the following as required.
   - To tag all the files in the search, click **Tag all files**.
   - To tag only the selected items, click **Tag selected files**.
4. In the **Add Tag** dialog box, Specify the following:

TAG NAME	ENTER A NEW UNIQUE TAG NAME.
Comments	Provide a comment or a description for the tag name.
Legal Hold	Select this check box if you want to apply the legal hold on the files.
Select retention Tag	Instead of applying a new tag, you can apply the retention tags that are created in Arctera Insight Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply.

TAG NAME	ENTER A NEW UNIQUE TAG NAME.
	After you select this option, the application disables the Tag Name field.

5. Click **Tag**.

After you apply tags to the files, these tagged files are available under the respective tags under the **Tags** node.

Applying labels to files

To help organize your work you can apply labels to the files. Labels are applied to files typically to mark them as exempt from the review process.

To apply a label to files

1. On the **Investigations** tab, create a new search or select the searches from the On-going searches or Standard searches node.
2. Perform advanced search or query search to get the expected items. See Performing Advanced Search and Query Search.

The application displays result.

1. On the **Files** tab, select the check box for one or more files to which you want to apply labels.
2. On the action menu, click **Label**.
3. In the **Add/Remove Labels** dialog box, select the labels you want to apply to the files.

You can clear the labels if these are not required anymore. In case you have selected multiple files, the **Add/Remove Labels** dialog box shows applied level status as follows:

- The check box that is not selected yet means this label is not at all applied to the selected files.
- The check box with the dash mark means the label is applied to some of the selected files, but not applied to all the selected files.
- The check box with the tick mark means the label is applied to all the selected files.

1. Select the required labels, and click **Apply Changes**.

After you apply labels to the files, these labeled files are available under the respective labels under the **Labels** node.

1. To ensure if the label is applied to the files, select the file to view its details in the right pane, and expand **Labels**.

You can click any label in the **Labels**popup to navigate to the respective label under the**Labels** node.

Exporting searched files

You can export a batch of files and share it with the concerned authority for the intended use. To secure the information, you can use the AES-256 encryption while creating a batch of files for export. After exporting the batch of files, you can download and share it with others.

To export a batch of files

1. On the **Investigations** tab, create a new search or select the searches from the On-going searches or Standard searches node.
2. Perform advanced search or query search to get the expected items. See Performing Advanced Search and Query Search.

The application displays result.

1. On the **Files**tab, select the check box for one or more files, and click**Export**. Do any of the following:
   - Click **Export selected files** to export only the selected files.
   - Click **Export all files** to export all the available files within the search.
2. In the **Export Options** dialog box, specify the following:

MESSAGE FORMAT	SELECT THE APPROPRIATE MESSAGE FORMAT FOR BATCH EXPORT. OPTIONS INCLUDE\:
	- JSON NOTE: THIS FORMAT IS SELECTED BY DEFAULT. WHEN YOU SELECT JSON FORMAT FOR EXPORT, FILES ARE DOWNLOADED IN THEIR ORIGINAL FORM, AND NOT AS JSON.
	- EDRM ONLY
Enable AES-256 Encryption	Select this check-box if you want to secure the access of the downloaded export batch.

MESSAGE FORMAT	SELECT THE APPROPRIATE MESSAGE FORMAT FOR BATCH EXPORT. OPTIONS INCLUDE\:
	- JSON NOTE: THIS FORMAT IS SELECTED BY DEFAULT. WHEN YOU SELECT JSON FORMAT FOR EXPORT, FILES ARE DOWNLOADED IN THEIR ORIGINAL FORM, AND NOT AS JSON.
	- EDRM ONLY
Export Name	Provide the name for the batch you want to export. By default, it takes the Search Name. You can change it if required.
Export Password	Enter the password that you want end user to provide when they access this exported batch of files.
Confirm Password	Repeat the same password for confirmation.
Generate Azure SAS URL	**Note:** Users can see this button only if theExport to Azure private storage locationfeature in the Arctera Insight Management Console is enabled for them. Users can export items to their private Azure Blob storage location.
	Click Generate Azure SAS URL to get the Azure Blob SAS URL to access the location and save it for future use.
	For security reasons, the application does not show this URL the next time. However, if the SAS URL is misplaced for any reason, click Generate Azure SAS URL again to generate a new SAS URL and save it securely.
	After you click Export on the Export Options dialog box, all the selected items are exported to the Azure private storage

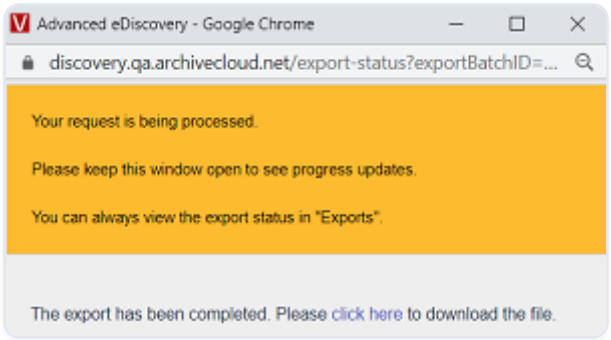
MESSAGE FORMAT	SELECT THE APPROPRIATE MESSAGE FORMAT FOR BATCH EXPORT. OPTIONS INCLUDE\:
	- JSON NOTE: THIS FORMAT IS SELECTED BY DEFAULT. WHEN YOU SELECT JSON FORMAT FOR EXPORT, FILES ARE DOWNLOADED IN THEIR ORIGINAL FORM, AND NOT AS JSON.
	- EDRM ONLY
	location. You can use Microsoft Storage Explorer to access the exported items.
Share Export	Click Select Admin to choose the recipients of this batch export and click Update .
	Note: You need to manually share the Export Password with the administrators and follow all the security specific rules of the organization.

3. Click **Export**.

> “ ”

Note: The exported batch can either gets downloaded as a single or multiple file segments.

> “ ”



4. Click **Click here** to download the exported batch of files.

5. To confirm the status of batch export, on the **Investigations**tab, select**Exports**. The application displays status of performed exports.

Exporting a search summary report for files

To export a search summary report for files

1. On the **Investigation** tab, select the search for which you want to export a summary report.
2. Click **New Search**to create a new search. Else, expand**On-going Searches**or**Standard Searches** to select existing search.
3. On the **Files**tab, and click**Export Report**.

The application downloads the summary report (.xlsx) of the files within the search as a zipped (.zip) folder. The report comprises of two sheets.

The **Search Summary** sheet displays details such as Search Parameters and Custodians.

The **Search Result** sheet displays details such as Date Received, list of people involved, and Attachments.

Working with Advanced ECA searches

The Advanced Early Case Assessment (ECA) Search is a new type of search under the Managed Accounts node you can create for investigation purposes. The application creates this node when you create an Advance ECA search for the first time. You don't need to configure anything in the Arctera Insight Management Console to view this node under Managed Accounts.

Advanced ECA search is different from the on-going and standard search. In on-going and standard searches, you can specify certain criteria based on which the application fetches emails, collaboration messages, and files from archives. In case of on-going and standard searches, after creating a search, you cannot again filter the required records (emails, messages, and files) within the search result. However, in the Advanced ECA search, you can refine your search results based on several filter options. It helps reviewers to filter the records and view the results most easily.

In a single Advanced ECA search, the application can save maximum 250000 records each for emails, collaboration messages, and files. The total records the application can save is maximum 750000 in a single Advanced ECA search.

Creating an Advanced ECA search

You can create an advanced ECA search in the following ways:

- Create a new search and save it as an Advanced ECA search, as explained in this section.
- Update the existing standard search under the Managed Accounts node. See Updating an on-going or a standard search from Managed Accounts.

To create an Advanced ECA search

1. On the **Investigations**tab, select**Managed Accounts**>**New Search**.
2. Perform advanced search or query search to get the expected items. See Performing Advanced Search and Query Search.
3. Click **Save Search**.
4. In the **Save Search** dialog box, enter a unique name for the search.
5. Select the **Advanced ECA** check box.

   > “ ”

   Note: After you select the Advanced ECA check box, the application disables theTag namefield, theOn-goingcheck box, and theLegal Holdcheck box.

   > “ ”

6. To send this search to a particular case, select the **Send to Case** check box, and select a valid case from the drop-down list.

   > “ ”

   Note: TheKeep copy in Investigationsremains selected by default. When you send the Advanced ECA search from theInvestigationstab to a Case in theeDiscoverytab, it gets saved underResearch Sets. After sending this Advanced ECA search to Case, it may show different result (email count) depending on the custodians selected in theCase Setupoption.

   > “ ”

7. Click **Save**.

The search appears under the Advanced ECA node in the left navigation pane.

After the search is created, you can select the appropriate filter options to refine the search results. For example, under **Filters**, expand**FormatType**and select**MS Teams** to view only MS teams related search results.

In a single Advanced ECA search, the application can save maximum 250000 records each for emails, collaboration messages, and files. The total records the application can save is maximum 750000 in a single Advanced ECA search.

> “ ”

Note: If the Advanced ECA search processing fails, you need to clickPlease try againto retry processing. If this search fails consecutively, you need to delete the search and create a new search again.

> “ ”

Updating an Advanced ECA search

To update an Advanced ECA search

1. On the **Investigations**tab, select**Managed Accounts**.
2. Select the Advanced ECA search that you want to update for its name.

The searched items appear in the details pane.

1. Click **Update Search**.
2. Enter a unique name for the search.
3. Click **Update**.

Filtering an Advanced ECA search

To filter an Advanced ECA search

1. On the **Investigations**tab, select**Managed Accounts**.
2. Select the already existing Advanced ECA search that you want to filter.

The search opens in the right pane.

1. Expand **Search Criteria** to view the criteria based on which this Advanced ECA search is created. You cannot edit the search criteria of Advanced ECA search.

2. Expand **Filters**, and click**Apply** to view the total number of records captured while saving this Advanced ECA search.

   > “ ”

   Note: ClickingApplyis a mandatory action to view correct number of filtered records in the Advanced ECA search. In a single Advanced ECA search, the application can save maximum 250000 records each for emails, collaboration messages, and files. The total records the application can save is maximum 750000 in a single Advanced ECA search. Out of 250000 records, the application displays only 50000 email records to users based on the filters applied. Users need to set the filter criteria carefully to filter desired archived items. If number of filtered item messages is greater than 50000, the application displays the following message: Too many items match the filter. The review set is capped at 50000 items.

   > “ ”

3. Under **Filters** , select or clear corresponding filter options.

The **Filters**section provides the following filter options that you can select or clear based on the idea of record analysis. To reset all filter options simultaneously, click**Clear**. You cannot save the filter criteria. After you clear the filter options, you need to set the filter options again.

FILTER NAME	ACTION
Subject	Specify any word or a term that is used in the Subject statement of a Search item.
Author	Specify the author of that email or message.
FormatType	Select this option to filter records based on format type.
SourceType	Select one or more required source types to filter items collected from them.
	For more information, See Performing Advanced Search and Query Search .

FILTER NAME	ACTION
Direction	Selects items that are traveling in a certain direction (incoming, outgoing, or interoffice communications).
MessageDate	Specify the duration of the records you want to search. You can customize the date range.
PolicyAction	Selects items by the policy action with which your policy management software has tagged them. This action can be one of the following\:
	- Inclusion (demands or suggests capture)
	- Exclusion (precludes capture or advocates non-capture)
	- No Action (the item is subject to normal random sampling)
PolicyName	Specify the specific policy with which your policy management software has tagged the items you want to filter.
SentimentScore	Classifies and displays the records based on their sentiment score. Click the displayed options to view those specific records.
TagValue	Select the specific tags to filter items to which these tags are applied.
Label	Select the specific labels to filter items to which these labels are applied.
HasAttachments	Specify if you want to filter records that have or have not the attachments to them.

1. Click **Apply** to view the filtered records from the selected Advanced ECA search.

Applying tags to the Advanced ECA search items

You can apply new tags to emails, collaboration messages, and files that are filtered during the Advanced ECA search. You can also view the previously applied tags and classification tags of the items. The following sections explains how to apply tags to these search items.

Applying tags to emails in Advanced ECA search

To apply tags to emails in Advanced ECA search

1. On the **Investigations**tab, select**Managed Accounts**>**Advanced ECA**.
2. Select the Advanced ECA search in which you want to tag the records. The search result opens in the right pane.
3. Set the filter options and click **Apply** to view the filtered items.
4. In the right pane, on the **Emails** tab, select one or more emails to which you want to apply tags.

   > “ ”

   Note: Before you apply tags to the items, you can view the previously applied tags of the items in the preview pane. However, you need to select only one item at a time to view the tags. In the following sample image, you can see the previously applied tags and retention tags to the email in theEmailstab.

   > “ ”

5. To add a tag to an individual item, click the item to preview its details in the preview pane, and click **Tag** as shown in the image above.
6. To add a tag to multiple items, on the action menu, click **Tag** , and select any of the following options as required.

   - To tag all the items in the search, click **Tag all emails**.
   - To tag all the items in the current page, click **Tag current page**.
   - To tag only the selected items, click **Tag selected emails**.

7. In the **Add Tag** dialog box, specify the following:

TAG NAME	ENTER A NEW UNIQUE TAG NAME.
Comments	Provide a comment or a description for the tag name.
Legal Hold	Select this check box if you want to apply the legal hold on the emails.
Select retention Tag	Instead of applying a new tag, you can apply the retention tags that are created in Arctera Insight Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply.
	After you select this option, the application disables the Tag Name field.

8. Click **Tag**.

After you apply tags to the emails, these tagged emails are available under the respective tags under the **Tags** node.

Applying tags to collaboration messages in Advanced ECA search

To apply tags to the collaboration messages in Advanced ECA search

1. On the **Investigations**tab, select**Managed Accounts**>**Advanced ECA**.
2. Select the Advanced ECA search in which you want to tag the records. The search result opens in the right pane.
3. Set the filter options and click **Apply** to view the filtered items.
4. In the right pane, on the **Collaboration** tab, select the collaboration messages to which you want to apply tags.

> “ ”

Note: Before you apply tags to the items, you can view the previously applied tags and classification tags of the message in the preview pane. In the following sample image, you can see the previously applied tags and classification tags of the collaboration messages when you hover over the icons.

> “ ”

5. On the action menu, click **Tag** , and do any of the following as required.
   - To tag all the items in the search, click **Tag all messages**.
   - To tag only the selected items, click **Tag selected messages**.
6. In the **Add Tag** dialog box, specify the following:

TAG NAME	ENTER A NEW UNIQUE TAG NAME.
Comments	Provide a comment or a description for the tag name.
Legal Hold	Select this check box if you want to apply the legal hold on the emails.
Select retention Tag	Instead of applying a new tag, you can apply the retention tags that are created in Arctera Insight Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply.
	After you select this option, the application disables the Tag Name field.

7. Click **Tag**.

After you apply tags to the emails, these tagged emails are available under the respective tags under the **Tags** node.

Applying tags to files in Advanced ECA search

To apply tags to files in Advanced ECA search

1. On the **Investigations**tab, select**Managed Accounts**>**Advanced ECA**.
2. Select the Advanced ECA search in which you want to tag the records. The search result opens in the right pane.
3. Set the filter options and click **Apply** to view the filtered items.
4. On the **Files** tab, select the files to which you want to apply tags.

> “ ”

Note: Before you apply tags to the items, you can view the previously applied tags of the file in the preview pane. You can see the previously applied tags and retention tags to the file.

> “ ”

5. On the action menu, click **Tag** , and do any of the following as required.
   - To tag all the items in the search, click **Tag all files**.
   - To tag only the selected items, click **Tag selected files**.
6. In the **Add Tag** dialog box, specify the following:

TAG NAME	ENTER A NEW UNIQUE TAG NAME.
Comments	Provide a comment or a description for the tag name.
Legal Hold	Select this check box if you want to apply the legal hold on the emails.
Select retention Tag	Instead of applying a new tag, you can apply the retention tags that are created in Arctera Insight Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply.
	After you select this option, the application disables the Tag Name field.

7. Click **Tag**.

After you apply tags to the emails, these tagged emails are available under the respective tags under the **Tags** node.

Applying labels to the Advanced ECA search items

You can apply new labels to emails, collaboration messages, and files that are filtered during the Advanced ECA search. You can also view the previously applied labels of the items. The following sections explains how to apply labels to these search items.

Applying labels to emails in Advanced ECA search

To apply labels to emails in Advanced ECA search

1. On the **Investigations**tab, select**Managed Accounts**>**Advanced ECA**.
2. Select the Advanced ECA search in which you want to filter the records and apply labels to the required emails within the search.

The search result opens in the right pane.

1. Set the filter options and click **Apply** to view the filtered items.
2. On the Emails tab, select the emails to which you want to apply labels.

   > “ ”

   Note: Before you apply labels to the items, you can view the previously applied labels of the items in the preview pane.

   > “ ”

3. On the action menu, click **Label**.
4. In the **Add/Remove Labels** dialog box, select the labels you want to apply to the emails.

You can clear the labels if these are not required anymore. In case you have selected multiple emails the **Add/Remove Labels** dialog box shows applied level status as follows:

- The check box that is not selected yet means this label is not at all applied to the selected emails.
- The check box with the dash mark means the label is applied to some of the selected emails, but not applied to all the selected emails.
- The check box with the tick mark means the label is applied to all the selected emails.

1. Select the required labels, and click **Apply Changes**.

After you apply labels to the emails, these labeled emails are available under the respective labels under the **labels** node.

1. To ensure if the label is applied to the emails, select the emails, and expand the **Labels** section to view its details in the right pane.

Applying labels to collaboration messages in Advanced ECA search

To apply labels to collaboration messages in Advanced ECA search

1. On the **Investigations**tab, select**Managed Accounts**>**Advanced ECA**.
2. Select the Advanced ECA search in which you want to filter the records and apply labels to the required collaboration messages within the search.

The search result opens in the right pane.

1. Set the filter options and click **Apply** to view the filtered items.
2. On the **Collaboration** pane, select the collaboration messages to which you want to apply labels.

   > “ ”

   Note: Before you apply labels to the items, you can view the previously applied labels of the items in the preview pane.

   > “ ”

3. On the action menu, click **Label**.
4. In the **Add/Remove Labels** dialog box, select the labels you want to apply to the emails.

You can clear the labels if these are not required anymore. In case you have selected multiple messages, the **Add/Remove Labels** dialog box shows applied level status as follows:

- The check box that is not selected yet means this label is not at all applied to the selected messages.
- The check box with the dash mark means the label is applied to some of the selected messages, but not applied to all the selected message.
- The check box with the tick mark means the label is applied to all the selected messages.

1. Select the required labels, and click **Apply Changes**.

After you apply labels to the collaboration messages, these labeled messages are available under the respective labels under the **labels** node.

1. To ensure if the label is applied to the messages, select the message, and expand the **Labels** section to view its details in the right pane.

Applying labels to files in Advanced ECA search

To apply labels to files in Advanced ECA search

1. On the **Investigations**tab, select**Managed Accounts**>**Advanced ECA**.
2. Select the Advanced ECA search in which you want to filter the records and apply labels to the required files within the search.

The search result opens in the right pane.

1. Set the filter options and click **Apply** to view the filtered items.
2. On the **Files** pane, select the files to which you want to apply labels.

   > “ ”

   Note: Before you apply labels to the files, you can view the previously applied labels of the files in the preview pane.

   > “ ”

3. In the preview pane, click the **Text View**or**Native View** icon to toggle between the file views.

Text view displays the file content in the plain text format. Whereas, the native view displays the file content in the original format, for example, MS Word, PDF, and so on.

1. (Optional) In the preview pane, click the download icon to save file on your local computer.
2. On the action menu, click **Label**.
3. In the **Add/Remove Labels** dialog box, select the labels you want to apply to the files.

You can clear the labels if these are not required anymore. In case you have selected multiple files the **Add/Remove Labels** dialog box shows applied level status as follows:

- The check box that is not selected yet means this label is not at all applied to the selected files.
- The check box with the dash mark means the label is applied to some of the selected files, but not applied to all the selected files.
- The check box with the tick mark means the label is applied to all the selected files.

1. Select the required labels, and click **Apply Changes**.

After you apply labels to the files, these labeled files are available under the respective labels under the **labels** node.

1. To ensure if the label is applied to the files, select the emails, and expand the **Labels** section to view its details in the right pane.

Exporting the Advanced ECA search items

You can export maximum 50000 records at a time.

Exporting emails from Advanced ECA search

To export emails from Advanced ECA search

1. On the **Investigations**tab, select**Managed Accounts**>**Advanced ECA**.
2. Select the Advanced ECA search in which you want to filter the records and export the required emails from the search.

The search result opens in the right pane.

1. Set the filter options and click **Apply** to view the filtered items.
2. In the right pane, select the emails you want to export.
3. Click **Export** , and do any of the following:
    - Click **Export current page** to export emails that are available on the current page.
    - Click **Export selected emails** to export all the selected emails from the search.
    - Click **Export all emails** to export all the emails available in the search.
4. In the **Export Options** dialog box, do the following:

MESSAGE FORMAT	SELECT THE APPROPRIATE MESSAGE FORMAT. BY DEFAULT, THE PST FORMAT IS SELECTED. THE AVAILABLE MESSAGE FORMATS ARE\:
	- CLEARWELL
	- EML
	- EML WITH EDRM
	- PST WITH EDRM
	- MSG WITH EDRM
	- FTI-RINGTAIL
	- EDRM ONLY
	- PST
	- ORIGINALEDRM IF YOU SELECT THIS OPTION, THE EXPORTED FILE INCLUDES EMAILS IN BOTH MSG AND EML FORMATS, ALLOWING YOU TO WORK WITH THE EMAILS IN THE FORMAT THAT BEST SUITS YOUR NEEDS. BESIDES THIS, THE EXPORTED FILE INCLUDES ADDITIONAL FILES, NAMELY - EDRMXML.XML AND HTMLREPORT.HTML IN THEIR ORIGINAL FORMATS. THESE FILES FACILITATES A SMOOTH TRANSFER OF ELECTRONICALLY STORED INFORMATION (ESI) BETWEEN DIFFERENT SOFTWARE PROGRAMS DURING THE ELECTRONIC DISCOVERY PROCESS.
	- ORIGINAL IF YOU SELECT THIS OPTION, THE EXPORTED FILE INCLUDES EMAILS IN BOTH MSG AND EML FORMATS, ALLOWING YOU TO WORK WITH THE EMAILS IN THE FORMAT THAT BEST SUITS YOUR NEEDS.
	NOTE: THEORIGINALEDRMANDORIGINALMESSAGE FORMATS ARE AVAILABLE TO THE USERS THAT ARE LISTED IN THECONFIGURATION_OVERRIDENTABLE IN THE ARCTERA INSIGHT ARCHIVING DATABASE. IF YOU WANT TO AVAIL

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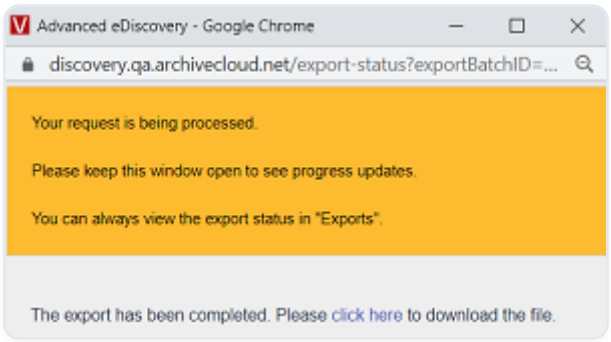
5. Click **Export**.

> “ ”

Note: The exported batch can either gets downloaded as a single or multiple file segments.

> “ ”



6. Click **Click here** to download the exported batch of messages.
7. To confirm the status of batch export, on the **Investigations**tab, select**Exports** , and search this export batch name.

Exporting collaboration messages from Advanced ECA search

To export collaboration messages from Advanced ECA search

1. On the **Investigations**tab, select**Managed Accounts**>**Advanced ECA**.
2. Select the Advanced ECA search in which you want to filter the records and export the required collaboration messages from the search.

The search result opens in the right pane.

1. Set the filter options and click **Apply** to view the filtered items.
2. In the right pane, on the **Collaboration** tab, select the messages you want to export.
3. Click **Export** , and do any of the following:

   - Click **Export selected messages** to export all the selected messages from the search.
   - Click **Export all messages** to export all the messages available in the Advanced ECA search.
   - Click **Export conversation** to export all the conversations for a selected message within a user specified date range.

It helps you to understand the context of the conversation for review purpose.

1. In the **Export Options** dialog box, do the following:

MESSAGE FORMAT	SELECT THE APPROPRIATE MESSAGE FORMAT FOR BATCH EXPORT. OPTIONS INCLUDE\:
	- JSON NOTE: THIS FORMAT IS SELECTED BY DEFAULT. WHEN YOU SELECT JSON FORMAT FOR EXPORT, FILES ARE DOWNLOADED IN THEIR ORIGINAL FORM, AND NOT AS JSON.
	- EDRM ONLY
Enable AES-256 Encryption	Select this check-box if you want to secure the access of the downloaded export batch.
Export Name	Provide the name for the batch you want to export. By default, it takes the Search Name. You can change it if required.
Export Password	Enter the password that you want end user to provide when they access this exported batch of messages.
Confirm Password	Repeat the same password for confirmation.
Generate Azure SAS URL	**Note:** Users can see this button only if theExport to Azure private storage locationfeature in the Arctera Insight Management Console is enabled for them. Users can export items to their private Azure Blob storage location.
	Click Generate Azure SAS URL to get the Azure Blob SAS URL to access the location and save it for future use.
	For security reasons, the application does not show this URL the next time. However, if the SAS URL is misplaced for any reason, click Generate Azure SAS URL again to

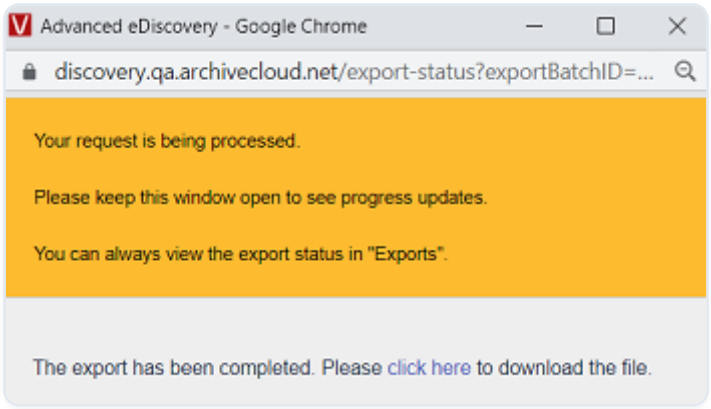
MESSAGE FORMAT	SELECT THE APPROPRIATE MESSAGE FORMAT FOR BATCH EXPORT. OPTIONS INCLUDE\:
	- JSON NOTE: THIS FORMAT IS SELECTED BY DEFAULT. WHEN YOU SELECT JSON FORMAT FOR EXPORT, FILES ARE DOWNLOADED IN THEIR ORIGINAL FORM, AND NOT AS JSON.
	- EDRM ONLY
	generate a new SAS URL and save it securely.
	After you click Export on the Export Options dialog box, all the selected items are exported to the Azure private storage location. You can use Microsoft Storage Explorer to access the exported items.
Share Export	Click Select Admin to choose the recipients of this batch export and click Update .
	Note: You need to manually share the Export Password with the administrators and follow all the security specific rules of the organization.

2. Click **Export**.

> “ ”

Note: The exported batch can either gets downloaded as a single or multiple file segments.

> “ ”



3. Click **Click here** to download the exported batch of messages.
4. To confirm the status of batch export, on the **Investigations**tab, select**Exports** , and search this export batch name.

Exporting files from Advanced ECA search

To export files from Advanced ECA search

1. On the **Investigations**tab, select**Managed Accounts**>**Advanced ECA**.
2. Select the Advanced ECA search in which you want to filter the records and export the required files from the search.

The search result opens in the right pane.

1. Set the filter options and click **Apply** to view the filtered files.
2. Select the files you want to export.
3. Click **Export** , and do any of the following:
    - Click **Export selected files** to export all the selected files from the search.
    - Click **Export all files** to export all the files available in the Advanced ECA search.
4. In the **Export Options** dialog box, do the following:

MESSAGE FORMAT	SELECT THE APPROPRIATE MESSAGE FORMAT FOR BATCH EXPORT. OPTIONS INCLUDE\:
	- JSON NOTE: THIS FORMAT IS SELECTED BY DEFAULT. WHEN YOU SELECT JSON FORMAT FOR EXPORT, FILES ARE DOWNLOADED IN THEIR ORIGINAL FORM, AND NOT AS JSON.
	- EDRM ONLY
Enable AES-256 Encryption	Select this check-box if you want to secure the access of the downloaded export batch.
Export Name	Provide the name for the batch you want to export. By default, it takes the Search Name. You can change it if required.
Export Password	Enter the password that you want end user to provide when they access this exported batch of messages.
Confirm Password	Repeat the same password for confirmation.
Generate Azure SAS URL	**Note:** Users can see this button only if theExport to Azure private storage locationfeature in the Arctera Insight Management Console is enabled for them. Users can export items to their private Azure Blob storage location.
	Click Generate Azure SAS URL to get the Azure Blob SAS URL to access the location and save it for future use.
	For security reasons, the application does not show this URL the next time. However, if the SAS URL is misplaced for any reason, click Generate Azure SAS URL again to generate a new SAS URL and save it securely.

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	- JSON NOTE: THIS FORMAT IS SELECTED BY DEFAULT. WHEN YOU SELECT JSON FORMAT FOR EXPORT, FILES ARE DOWNLOADED IN THEIR ORIGINAL FORM, AND NOT AS JSON.
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	After you click Export on the Export Options dialog box, all the selected items are exported to the Azure private storage location. You can use Microsoft Storage Explorer to access the exported items.
Share Export	Click Select Admin to choose the recipients of this batch export and click Update .
	Note: You need to manually share the Export Password with the administrators and follow all the security specific rules of the organization.

5. Click **Export**.

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Note: The exported batch can either gets downloaded as a single or multiple file segments.

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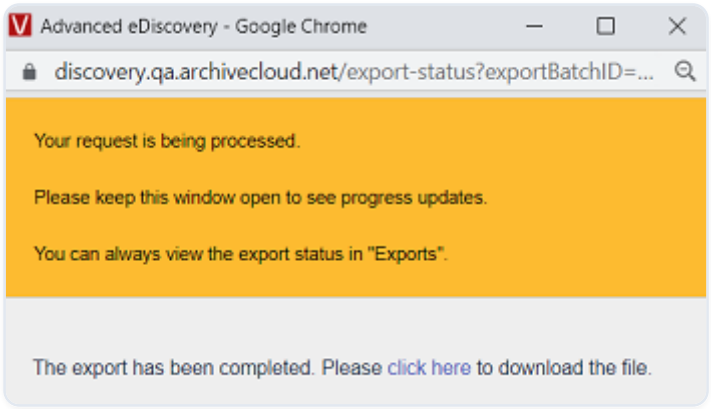

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Exporting an Advanced ECA search summary report

This section describes the exporting the summary report for emails, collaboration messages, and files.

Exporting a search summary report for emails

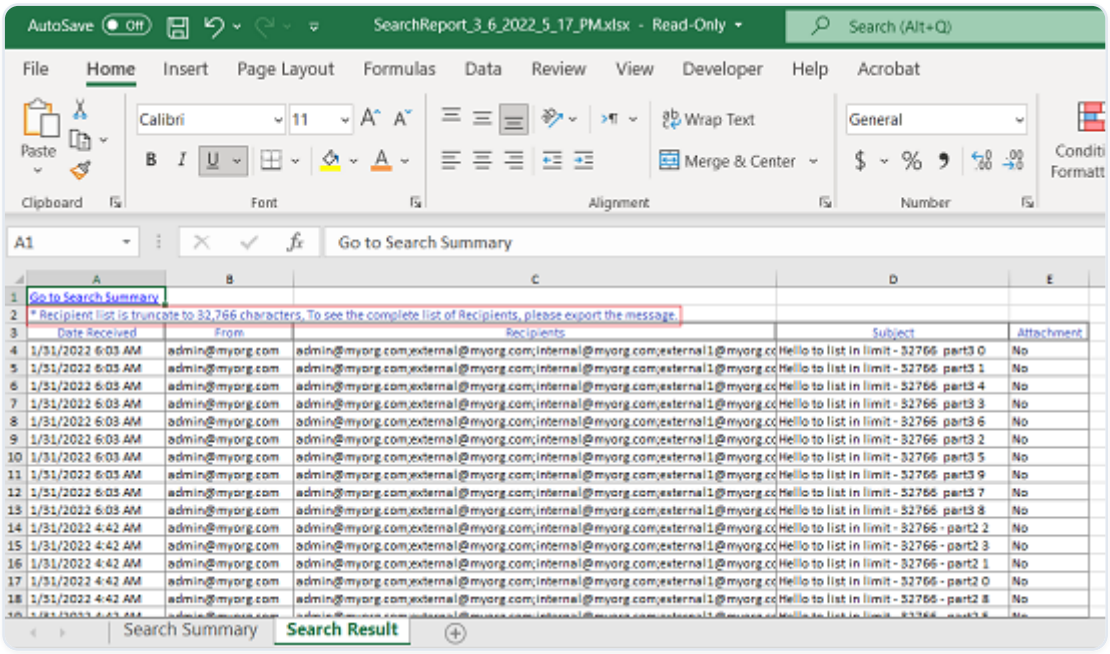
To export an Advanced ECA search summary report for emails

1. On the **Investigations**tab, select**Managed Accounts**>**Advanced ECA**.
2. Select the Advanced ECA search for which you want to export the summary report.

The search result opens in the right pane.

1. On the **Emails**tab, click the**More Actions**icon, and click**Export Report**.

The application downloads the summary report (.xlsx) of the emails within the Advanced ECA search as a zipped (.zip) folder. A sample report is shown below. The report comprises of two sheets.



> **Note:** TheSearch Summarysheet displays details such as Search Parameters and Custodians. TheSearch Resultsheet displays details such as Date Received, From, Recipients, Subject, and Attachments. The recipient column in this summary report includes recipients mentioned in the To, CC, and BCC fields. If the list of recipients is longer than 32766 characters, the application truncates the list. The report displays a note that -Recipient list is truncate to 32,766 characters, To see the complete list of Recipients, please export the message.In such scenario, to view the complete list of recipients, you need to export the individual message.

Exporting summary report for collaboration messages

To export an Advanced ECA search summary report for collaboration messages

1. Select the required search under the Research Sets or the Review Sets node.
2. On the **Investigations**tab, select**Managed Accounts**>**Advanced ECA**.
3. Select the search for which you want to export the summary report.

The search result opens in the right pane.

1. On the **Collaboration**tab, and click**Export Report**.

The application downloads the summary report (.xlsx) of the collaboration messages within the search as a zipped (.zip) folder.

Exporting summary report for files

To export an Advanced ECA search summary report for files

1. On the **Investigations**tab, select**Managed Accounts**>**Advanced ECA**.
2. Select the Advanced ECA search for which you want to export the summary report.

The search result opens in the right pane.

1. On the **Files**tab, and click**Export Report**.

The application downloads the summary report (.xlsx) of the files within the Advanced ECA search as a zipped (.zip) folder.

Reassigning emails from the Advanced ECA search

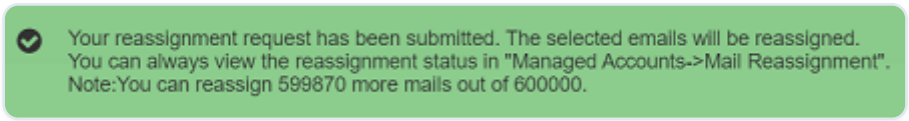
To reassign emails from the Advanced ECA search

1. On the **Investigations**tab, select**Managed Accounts**>**Advanced ECA**.
2. Select the Advanced ECA search in which you want to filter the records for reassigning to specific accounts.

The search result opens in the right pane.

1. Set the filter options and click **Apply** to view the filtered items.
2. In the right pane, select the items you want to reassign.
3. Click **Reassign Mails** , and do the following:
    - To reassign selected emails, click **Reassign selected emails**.
    - To reassign emails displayed on one page, click **Reassign emails in current page**.

The application displays the sample message as follows:



Printing the selected Advanced ECA searched items

To print the selected Advanced ECA searched items

1. On the **Investigations**tab, select**Managed Accounts**>**Advanced ECA**.
2. Select the Advanced ECA search in which you want to filter the records for printing.

The search result opens in the right pane.

1. Set the filter options and click **Apply** to view the filtered items.
2. To print emails, on the **Emails**tab, select the items you want to print. Click the**More Actions**icon, and click**Print**.

A separate dialog box appears and displays the metadata and the content of the items ready for printing.

1. To print files, on the **Files**tab, select the file you want to print. Click the**Download** icon to save that file on your local computer, and then print it.
2. Ensure that the content is the same you want to print. Click **Print** and save the document as PDF.

Deleting an Advanced ECA search

To delete an Advanced ECA search

1. On the **Investigations**tab, select**Managed Accounts**>**Advanced ECA**.
2. Select the Advanced ECA search that you want to delete.

The search result opens in the right pane.

1. Click **Delete Saved Search**.

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

1. Click **Yes**to complete the operation or click**No** to cancel it.

The application deletes the search from the Advanced ECA node.

Creating archive sets during investigation

To create an archive set during investigation

1. On the **Investigations**tab, select**Managed Accounts**. and do any of the following:
    - Select **New Search** to execute a search.

- Expand **On-going Searches**or**Standard Searches** as required, and select the required saved search.

2. To send all the items of the search to a collection set, click **Send to Case**.

To send specific items of the search to a collection set, search for and select them, and then click **Send to Case**.

1. In the **Send to Case - Create Archive Set** dialog box, specify the following:

CASES	SEARCH AND SELECT THE CASE IN WHICH YOU WANT TO CREATE AN ARCHIVE SET AND DOCUMENTS ACCORDINGLY.
Archive Set name	To create a new Archive Set, select New and provide a unique name for the archive set you want to create.
	To send the items in the existing Archive Set, select Existing . The application displays a list of existing archive sets, then select the required archive set.
	Sending this search result from Investigations to a Case in eDiscovery ignores the custodian(s) selected in the Case setup.

> “ ”

Note: The default limit for sending search results to an archive set is 250,000 items, including emails, collaboration messages, and files. This limit can be adjusted based on customer requirements, but customers cannot modify it themselves. They can contactArctera™ Insight Supportfor assistance.

> “ ”

2. Click **Save**.

About Mail Reassignment

On the Investigations tab, the Mail Reassignment node is available to those users with Administrator or Reviewer role privileges. Mail reassignment is used to send already processed emails back to go through the process of parsing, mail transfer, and sender-recipient mail address mapping.

Emails are usually mapped to the unassigned legacy account because the domain or account has not been provided for email archiving or searching. Later, when such users are added as archive accounts, these previously mapped emails are required to assign again to map the mail addresses. After successful reassignment of such emails, new users can search and view these emails.

Reassigning emails

Every company has an unassigned legacy account. New users from the company cannot search or view the emails that were sent to their account before it was created. All such mails that do not find appropriate recipient of the mail goes to unassigned legacy account.

To enable such users to receive their previously assigned emails, you, as an administrator, need to reassign such emails to them. After you submit email batch for reassignment, application resends these emails to corresponding user accounts. All the new users can then search and view their emails.

You can reassign emails from the unassigned legacy accounts, on-going and standard searches, holds, and tags. You can select maximum 300 emails in one batch for reassignment. If there are more than 300 emails in the unassigned legacy account, you need to reassign emails in multiple batches. The maximum annual limit of mail reassignment is 600000 mails per customer, whereas the daily limit is 4500 per day per customer. When customers submit a batch for reassignment, customers can view a temporary notification (that fades out automatically) about their available reassignment limit. Alternatively, customers can check their mail reassignment limits on the Mail Reassignment node.

When customers use 90 percent of their annual mail reassignment limit, they receive an alert email.

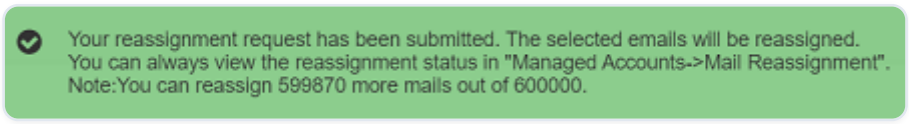
To reassign emails

1. On the **Investigations** tab, search for and select emails from one of the following locations:
    - Go to **Managed Accounts**>**Accounts**.
    - Go to **Managed Accounts**>**On-going Searches**.

- Go to **Managed Accounts**>**Standard Searches**.
- Go to **Holds**.
- Go to **Tags**.

2. Search for and select emails from the required unassigned legacy account, on-going and standard searches, hold, and the tags.
3. To reassign up to 30, 50, 100, and 300 emails in one batch, select number of emails you want to view on one page, and click the **Reassign current page** icon.
4. Click **Reassign Mails** , and do the following:
   - To reassign selected emails, click **Reassign selected emails**.
   - To reassign emails displayed on one page, click **Reassign emails in current page**.

The application displays the sample message as follows:



Viewing email reassignment status

After you submit a batch for email reassignment, you need to know the status of every batch. There are four statuses, namely Queued, In-progress, Completed, and Failed.

To view email reassignment status

1. On the **Investigations**tab, select**Managed Accounts**>**Mail Reassignment**.
2. To view the status of email reassignment batches initiated by multiple admin accounts of the same company, select the **Show status of the reassignment requests submitted from all administrator accounts** check-box.
3. Use the **Advanced Search** option to search for the batch you want to check the status.
4. Select the batch.

The **Status** column displays the current reassignment status of the batch.

The **Reassignment Details** pane displays the Batch ID, name of the email reassignment initiator, total emails in the batch, successfully reassigned emails from the batch, date and time of the reassignment activity.

> “ ”

Note: If the batch status is either Queued or In-progress, then theCanceloption remains enabled. You can click theCanceloption to abort the reassignment activity. If the batch status is either Completed or Failed, then theCanceloption remains disabled. You cannot click theCanceloption to abort the reassignment activity.

> “ ”

Canceling the email reassignment activity

After you submit a batch for email reassignment, you need to know the status of every batch. There are four statuses, namely Queued, In-progress, Completed, and Failed. You can cancel the email reassignment activity only when the batch status is Queued or In-progress. You cannot cancel the reassignment for the Completed and Failed batches. You can cancel one batch at a time.

To cancel email reassignment activity

1. On the **Investigations**tab, select**Managed Accounts**>**Mail Reassignment**.
2. Use the **Advanced Search** option to search for the batch you want to cancel.
3. Select the batch whose status is either Queued or In-progress.
4. Under **Reassignment Details**, ensure that the**Cancel** option is enabled.
5. Click **Cancel**.

Generating a Mail Reassignment status report

If you want to share the email reassignment status report, you need to generate it from Arctera Insight Management Console. You must have an administrator role to access the reports section.

Refer to the Creating a Mail Reassignment status report section in the Management Console Help.

Viewing mail reassignment notifications and status reports

After performing the mail reassignment, the application notifies the user (who initiated the reassignment task) about the status of the mail reassignment task and the errors that occurred during reassignment. Email notifications are sent only for the batches that are completed.

To view a notification

1. On the **Investigations**tab, select**My Mailbox**>**Mailbox**.
2. Click **Inbox** to view the list of emails regarding mail reassignment batch statuses.

3. Search for and select the emails for which you want to see the mail reassignment statuses.

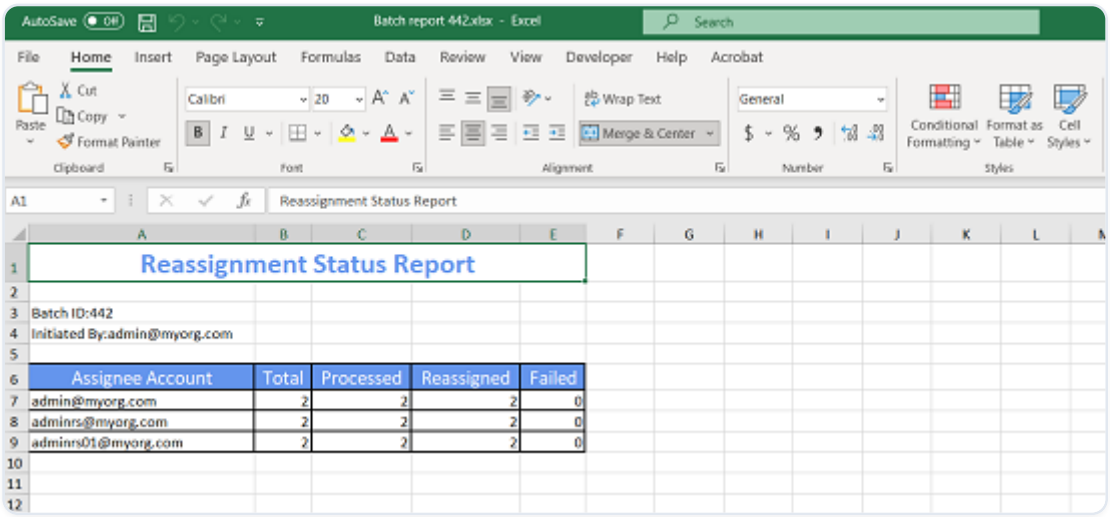
> “ ”

Note: Perform advanced search or query search to get the expected items. SeePerforming Advanced Search and Query Search.

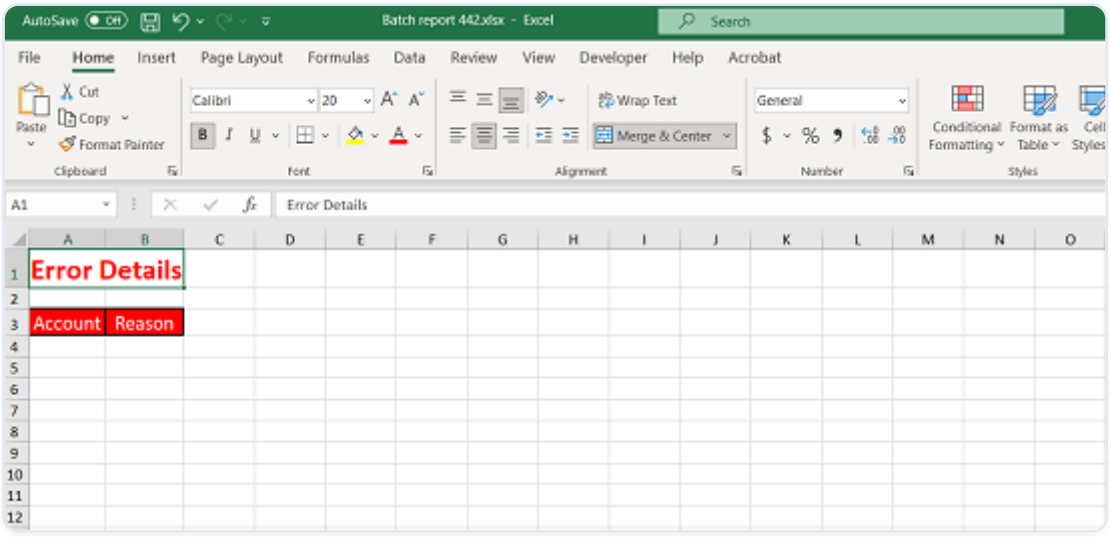
> “ ”

4. Click the email to view details in the preview pane in the right side of the page.
   - The **Subject** of the notification email shows the status of mail reassignment batch.
   - The **Attachment**shows the link to download the batch status summary report. The report is in the Microsoft Excel format and includes the***Status Report***and the***Error Report*** sheets.
5. Click the link to download the report on your local computer.

A sample **Status Report** sheet is shown as:



A sample **Error Report** sheet is shown as below. It provides the reason of the failure or error occurred during email reassignment.



About labels

The eDiscovery Administrators can use the default labels or create customized labels to suit your company's processes and requirements. Labels are applied to emails typically to mark them as exempt from the review process. The default labels are: Spam, Privileged, and Personal.

Creating a label

To create a new label

1. On the **Investigations**tab, in the left navigation pane, select**Labels**.
2. Click **Add**.
3. Specify the following details:

NAME	SPECIFY A UNIQUE NAME FOR THE LABEL.
Description	Optionally enter a description for the label.
\# Emails	Displays number of items to which this tag is applied. If this tag is not applied, the number of items shown as zero.
Action	Click View Emails to view items with the corresponding label.
Active	Select the Active check box for the label if you want to display this label while reviewers

NAME	SPECIFY A UNIQUE NAME FOR THE LABEL.
	assign labels to items. Clear the check box for any labels that you want to hide.

4. Click **Save Label**.

About legal holds

This section describes the tasks that a user can perform with the legal holds.

Viewing the Legal Hold status of items

The Legal Hold icon reveals whether the searched emails, collaboration messages, and files are on legal hold and the reason for the hold. The application does not display this icon for items that are not on legal hold.

For a better understanding of the Legal Hold concept, let's explore the following terminologies:

- Tag Legal Hold: Legal hold is applied to the item by using a legal hold tag from the Investigations tab.
- Case Legal Hold: Legal hold is applied to the item inside a case by using one or more options below:
    - An individual item is marked as Legal Hold inside a case.
    - The Review set in which the item exists is marked as legal hold.
    - The entire case in which any of the items custodian is present as case custodian is placed on legal hold.

    > “ ”

    Note: For better application performance, it is recommended to deselect theLegal Holdcolumn if it is no longer needed.

    > “ ”

To view the Legal Hold status of items

1. On the **Investigations**or**eDiscovery**tab, navigate to the appropriate Search from the required node, and select the**Email**,**Collaboration**, or**Files** tab.

The searched items are displayed in the items grid.

1. Ensure that the **Legal Hold** column is displayed on the items grid.
2. If this column is not displayed, click the **Columns** icon.

Select the **Legal Hold**check box and click**Apply**.

The application displays the column as shown in the sample images below.

1. Hover over the icons to view tooltip that indicate the reason items are on legal hold as shown in the sample images below.

In the **Investigation** tab, the legal hold icons and tooltip have the following meanings:

ICON	TOOLTIP	MEANING
	Tag Legal Hold	Legal hold applied by the current user using a tag. There might be additional legal holds on the same item, such as tag legal hold by another user or a legal hold inside a case.
	Tag Legal Hold	Legal hold applied by other users using a legal hold tag. additionally, the same item can also be on legal hold inside cases.
	Case Legal Hold	Legal hold is applied only inside cases by any user and not by using a legal hold tag.

In the **eDiscovery** tab, the legal hold icons and tooltip have the following meanings:

ICON	TOOLTIP	MEANING
	Case Legal Hold	Legal hold applied inside the selected case. There might

ICON	TOOLTIP	MEANING
		be additional legal holds on the same item, such as legal holds inside other cases or by using a legal hold tag from the Investigations tab.
	Case Legal Hold	Legal hold applied on the item, not in the current case but inside other cases. There might be additional legal holds applied on the same item using legal hold tags from the Investigations tab.
	Tag Legal Hold	The item is not on legal hold inside any case, but it is applied with legal hold tags by any user.

Viewing legally hold items

While you tag the items, collaboration messages, and files, you can apply legal hold on the selected items. You can view those items under the Legal holds node.

To view legally hold items

1. In the **Investigation**tab, select**Legal Holds**.
2. Select the tag name.

In the details pane, the application displays the items that are tagged and marked as legal hold.

1. Select one item at a time to preview its details in the preview pane.
2. Click the Native View icon to view the item in the original format.
3. To download the item, click the **Download** icon.

About Tags

This section describes the tasks that a user can perform with the tags.

Updating tags

To update a tag

1. On the **Investigations**tab, select**Tags**.
2. Select the tag you want to update.

The application displays all items to which the selected tag is applied.

1. Click **Update Tag**.
2. In the **Tag** dialog box, do the following:
   - In the **Tag Name** field, modify the existing tag name, if required.
   - In the **Comments** field, specify the reason to update the tag.
   - To apply legal hold on the items with this tag, select the **Legal Hold** check box.
3. Click **OK**to complete the operation or click**Cancel** to abort updating task.

Removing items from tags

To remove items from tags

1. On the **Investigations**tab, select**Tags**.
2. Select the tag to view all items to which the selected tag is applied.
3. In the **Collaboration** tab, select the message which tag you want to remove.
4. Click **Remove from Tag**.

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

1. Click **Yes**to complete the operation or click**No** to cancel it.

Deleting tags

To delete a tag

1. On the **Investigations**tab, select**Tags**.
2. Select the tag you want to delete.

The application displays all items to which the selected tag is applied.

1. Click **Delete Tag**.

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

1. Click **Yes**to complete the operation or click**No** to cancel it.

About search log

The search log provides you with the records of searches conducted in the Investigation and eDiscovery tabs, for auditing purpose. However, searches made under the Advanced ECA node in the Investigation tab and the Review Sets node in the eDiscovery tab are excluded from the log. It covers details of searches for emails, collaboration messages, and files, with separate logs for each search type.

The Advanced Search functionality of the Search Log node enables you to filter the record based on simple keyword values, user, or time period, enabling you to view specific records as needed. You can export search log records for a maximum duration of one year from the current date.

Viewing and exporting search log report

To view and export search log report

1. On the **Investigations**tab, select**Search Log**.

The application displays the record of all the searches, except for the searches performed under the **Advanced ECA**node in the Investigation tab and the**Review Sets** node in the eDiscovery tab.

1. To filter the appropriate records from the entire log, expand the **Advanced Search** pane (if it is not expanded already), and do the following:

SEARCH CRITERIA	TYPE THE SPECIFIC KEYWORDS TO BE QUERIED.
User	Select all users or the required user.
Search Date	Select the duration of the report from the available options.
	Note: The application allows exporting records of maximum one year. TheExport Reportoption enables only if the selected data is within one year.

2. Ensure that the filtered result is as expected.
3. Click **Export Report**.

The report is downloaded to your local downloads folder for further analysis.

About transcription of media attachments

Insight eDiscovery supports transcription of media attachments included in emails, collaboration messages, and files. By default, this feature is disabled. To enable it, contact your system administrator or the Arctera Support team.

When the feature is enabled:

1. The media attachments are marked with the Audio Description icon. Clicking the icon displays the media transcription in the preview pane.
2. Upon displaying the transcription, the Smart Transcript icon (media icon) appears on the preview pane toolbar. Clicking the Smart Transcript (media) icon opens the attachment in a new window with playback.
3. Customer can request to enable the required audio/video format. The currently supported media formats are `.mp3, .wav, .ogg, .mp4, .mov, .webm, .mpeg,` and `.opus`.

Viewing transcription of media attachments

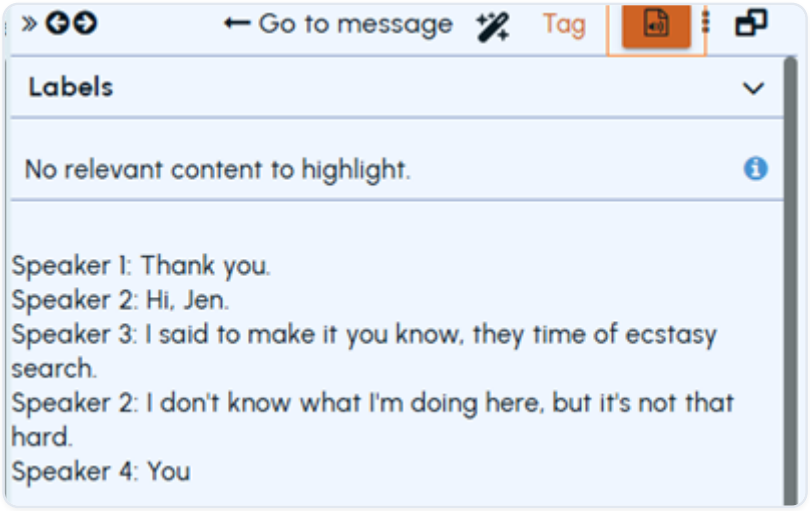
You can start with a new search or access previous, ongoing, standard, or advanced ECA searches as needed.

To view transcription of media attachments

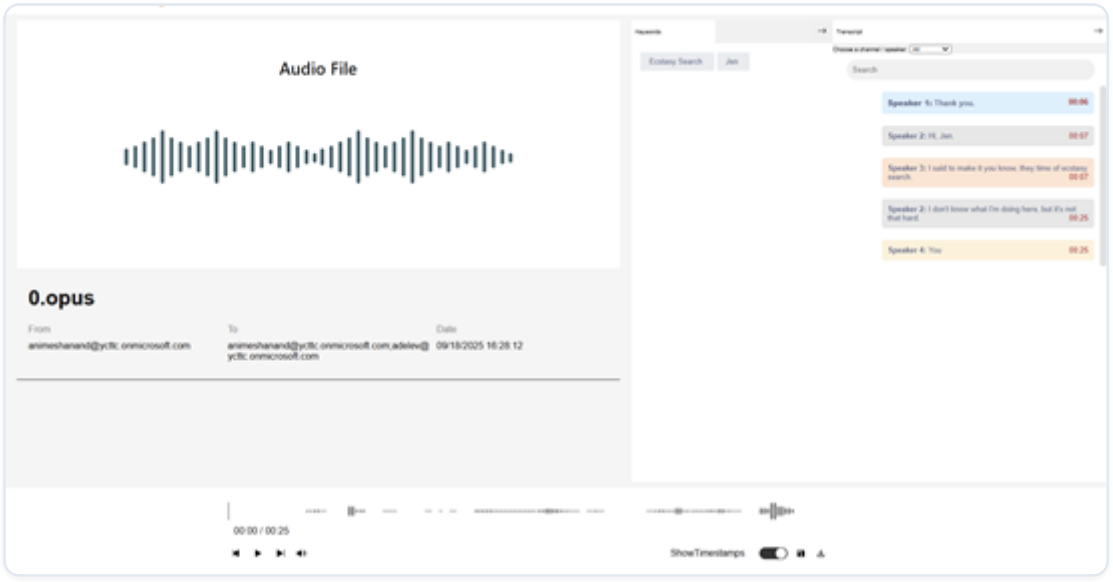
1. Navigate to Emails, Collaboration, or Files tab, and open the search result.
2. Search for and select the review item that contains media attachment (marked with the **Audio Description** icon.). Refer to the sample image below.

3. Click the **Audio Description** icon.

The application displays the media transcription in the preview pane. At the same moment, the **Smart Transcript** icon (media icon) appears on the preview pane toolbar as shown in the sample image below.



1. Click the **Smart Transcript** (media) icon to opens the attachment in a new window, along with playback. Refer to the sample image below.



The following functionalities are available for users:

- **Audio File Details**
  - Displays the file name (for example, xyz.opus).
  - Shows sender (From), recipients (To), and the Date/Time of the email.
- **Audio Waveform Panel**
  - Visual representation of the audio file.
  - Helps users see playback position and intensity of sound across the recording.
- **Transcript Panel**
  - Identifies speakers (for example, Speaker 1, Speaker 2) and lists conversation text aligned with timestamps.
  - Highlights each line with the exact time in the audio file.
  - Provides a Search box to locate keywords in the transcript. Allows filtering by channel/ speaker.
- **Keywords Section**
  - Displays matched keywords (for example, Ecstasy Search, Jen).
  - Enables quick navigation to relevant parts of the transcript.
- **Download Option** : Allows downloading of the audio file for offline use.
- **Timestamps Toggle Option** : Show or hide timestamps alongside transcript text.

Managing cases

This section includes the following topics:

- About cases
- About case workflow summary: eDiscovery Administrator
- Creating case review statuses
- Creating cases
- Adding parent tags and their child tags
- Applying tags to the searched items in cases
- Removing tags of the searched items in cases
- Viewing case details
- Editing cases
- About searches in eDiscovery

About cases

In Insight eDiscovery, an eDiscovery Administrator creates a case as a container that contains emails, collaboration messages, and files related to the case. Administrators and reviewers can perform a traceable examination on these items. Administrators can view all the cases in Insight eDiscovery, whereas reviewers can only view the cases to which they are assigned.

Cases are created and managed in the eDiscovery tab. When creating a case, the eDiscovery Administrator selects the user accounts (custodians) that the eDiscovery has to include. Within the case the eDiscovery Administrator can create and save the searches that find the custodian emails, messages, and files that may be pertinent to the case. The searches and review actions within a case are traceable.

> “ ”

Note: Cases can never be deleted from Insight eDiscovery. When a case is completed you can hide it from the cases list, but you cannot remove it.

> “ ”

Typically a case is set to place a legal hold on all the emails, messages, and files that are associated with it. The legal hold ensures that these items are retained in Arctera Insight Archiving, regardless of the company's email retention policies. These items remain on a legal hold until the reviewer or administrator removes the legal hold. Normally, the legal hold is removed for an item when a reviewer determines that it is not of interest to the case. Legal hold can also be applied to the results of individual searches.

When you save a search of a case, you can choose to save it as a Review Set, at which point you assign the search results to the reviewers of that for analysis. Multiple reviewers can interact and collaborate to review the search results to distribute the review work and expedite the discovery process. Once a search is saved as a Review Set it cannot be modified.

About case workflow summary: eDiscovery Administrator

Table: Process for an eDiscovery Administrator to set up a new case shows the steps that are required for an eDiscovery Administrator to create and manage a case.

Table: Process for an eDiscovery Administrator to set up a new case

PHASE	ACTION	DESCRIPTION
Phase 1	Prepare the reviewers, labels, review status tags, and redaction reasons for the cases.	- Prepare the reviewers. The System Administrator can assign Arctera Insight Archiving accounts to the Reviewer and Administrator roles as required. See About account roles and Insight eDiscovery . **Note:** Take care in selecting users for theReviewerrole, since reviewers can see other employees' emails, messages, and files.

PHASE	ACTION	DESCRIPTION
		- Prepare the labels. You can use the default labels or create customized labels to suit your company's processes and requirements. Labels are applied to items typically to mark them as exempt from the review process. The default labels are: Spam , Privileged , and Personal . You can manage the labels from the Investigations > Labels node. See Creating a label .
		- Prepare the review status tags. You can create review status tags and choose which are available when creating new cases. See Creating case review statuses .
		- Prepare the redaction reasons. You can create redaction reasons and choose which are available when creating cases. See Adding redaction reasons .
Phase 2	In eDiscovery > Cases , add a new case.	The steps to add a new case are\:
		- Provide a name, description, and expiry date.
		- Apply legal hold for the case, if required.
		- Select the user accounts (custodians) on which to perform the eDiscovery.

PHASE	ACTION	DESCRIPTION
		- Select one of more reviewers for the case.
		- Select the review status tags to use with the case.
		- Select redaction reasons to use with the case.
		See Creating cases .
Phase 3	Create a search.	Use a search to find the data of interest. Run the search to check the results. The results of assigned searches determine the items that the reviewers can process further. Typically, the reviewers do not see any other items than these.
		See Performing searches within cases .
Phase 4	Apply tags and notes to the search items.	Apply tags to items as required.
		See Applying tags to emails .
		See Adding notes to emails .
Phase 5	Save the search and assign it to a reviewer.	Assign the required searches to the reviewers for analysis. You can divide the search results between multiple reviewers.
		Apply a search-level legal hold, if required.

PHASE	ACTION	DESCRIPTION
		See Saving searches in Review sets and Research sets .
		See Assigning review sets to reviewers .
		See Applying a search-level legal hold .

Creating case review statuses

The eDiscovery Administrators can customize the case review status tags if required, to reflect their internal workflow. You can hide or rename the supplied status tags, and you can create new status tags.

Review status tags cannot be edited or hidden once they are applied to one or more emails.

To create the case review status

1. On the **eDiscovery**tab, select**Review Status**.
2. Click **Add Row**.
3. To customize a new status tag, do the following:
    - Provide a unique name and the description for the review status tag.
    - Select the **Is Active** check box for the status tags you want to display when creating a new case.
    - To hide the review status tag, clear the **Is Active** check boxes for respective statues.
    - Select the **Is Default** column to indicate the tag status as default.

    > “ ”

    Note: You must specify at least two review status tags as default.

    > “ ”

4. Click **Save**.

Creating cases

The eDiscovery Administrators can create cases and select which custodians to associate with the case. Once a case is created, all items (emails, collaboration messages, and files) for the case can be placed on legal hold to ensure that the items are retained.

To create a case

1. On the **eDiscovery**tab, click**Cases**.
2. Click **Add Case**.

The **Add New Case** dialog box appears.

1. Under **Case Status** , specify the following details:

CASE STATUS	SELECT THE ACTIVE OPTION.
Legal Hold	By default, this option is set to OFF.
	Switch this field to ON or OFF to toggle the options whether to apply a case-level legal hold to case items.
Number of custodians	Displays number of custodians associated with the case.
Number of Items	Displays the total count of items associated with the custodians selected for the case.
	Note: Items collected during the investigation may include items associated with custodians who are not part of the case. Thus, if not all custodians associated with the case are selected, the item count may differ.
Expiration Date	Displays case expiration date.
Number of Items on Legal Hold	Displays number of items in a case that are on legal hold.

2. Under **Case Details** , specify the following details:

APPLY LEGAL HOLD	CLICK YES TO TOGGLE THE OPTION BETWEEN YES AND NO. THE YES OPTION APPLIES A CASE-LEVEL LEGAL HOLD TO ITEMS, AND IS THE DEFAULT VALUE.
	NOTE: THIS OPTION KEEPS ALL ITEMS FOR THE CASE ON LEGAL HOLD UNTIL THE ADMINISTRATOR REMOVES THE LEGAL HOLD.
Name	Enter a unique name for the case.
Description	Optionally enter a description for the case.
Expiration date	Select Never Expires , or enter an expiration date for the case.
	After the expiration date a case's status changes to inactive. An inactive case becomes read-only for reviewers, but all its associated data and any hold remains intact. The eDiscovery Administrator can revert an inactive case back to active status.
Filing date	Specify the case filing date.
Case Type	Specify the type of case.
Department	Provide the department details.
Matter Number	Provide the matter number.
Court/Docket	Provide the court and docket number.
Additional Staff Members	Provide the additional staff member names involved in the case.
Case Notes	Provide a note for a case, if required.

3. Under **Custodians for Case** , do one of the following:

- Select **All Custodians** to include all the archive accounts as accounts that may be searched for this case.

  > “ ”

  Note: If underCase Status, theLegal Holdoption is set toON, and underCustodians for Case, you select theAll Custodiansoption, the application displays the following message:

  > “ ”

This alert message recommends you to select specific custodians instead of all custodians to avoid performance issues. However, if you are sure about selecting the **All Custodians**option, click**Yes**. Else, click**No**and select the**Select Custodians** option.

When you select the **All Custodians**option, the**Add Custodians** option remains disabled.

- Select **Select Custodians**to choose the archive accounts that you want to include for search. The**Add Custodians**option gets enabled. Click**Add Custodians**and select the required custodians, then click**Save**. The**Add/Remove Custodians** dialog box appears.
  - Expand the **Selected Custodians**to view your selection. To remove the selected custodian, click the**Delete**icon beside it and then click**Update**.
  - Expand the **Manage Custodians**to search and select the available custodians across the pages and click**Update**.

1. Under **Reviewers for Case**, click**Add Reviewers**to choose the reviewers for this case, and then click**Save**.
2. Under **Customizations** , select the review statuses that need be available to the reviewers when they review each message.

Under **Set Review Status to** , do any of the following:

- Select **Default**and click**View** to use the default list of review statuses in their default order.
- Select **Custom**and click**Choose Review Status Tags** to choose which review statuses are to be used with this case.

1. Under **Redaction Reasons** , select the redaction reasons that need to be available to the reviewers when they review each message.

Under **Set Redaction Reasons to** , do any of the following:

- Select **Default**and click**View** to preview the by default selected redaction reasons.
- Select **Custom**and click**Choose Redaction Reasons Status**to choose the redaction reasons to be used with this case. Then, click**View** to preview the selected redaction reasons.

1. Under **Case Tags** , add parent tags and their child tags.

Before you add parent tags and their child tags, See Adding parent tags and their child tags.

By default, it is set to **None**.

Select **Custom**>**Customize Case Tags** to add a case-specific tags.

Click **New Case Tag** to create a new parent tag. Provide a unique tag name and comments for this parent tag.

If required, add child tags, and click **Done**.

> “ ”

Note: Under the parent tag, you can add a maximum of 10 child tags up to three levels in the hierarchy. Adding tags with same names under different parent is permitted. However, you cannot save a new tag with a duplicate name in the same window; you must save other identical tags individually first. TheNew Case Tagfunctionality lets you create multiple tags simultaneously. While applying tags to the searched items, you can select multiple tags.

> “ ”

1. Click **Save Case** to create the case with your selected options.

Adding parent tags and their child tags

Adding case tags to individual cases helps you categorize, organize, and analyze them during the review process. You can customize new parent and child tags.

Under the parent tag, you can add a maximum of 10 child tags up to three levels in the hierarchy. Adding tags with same names under different parent is permitted. However, you cannot save a new tag with a duplicate name in the same window; you must save other identical tags individually first.

To add new parent tags and their child tags

1. On the **eDiscovery**tab, click**Cases**.
2. Click **Add Case**.
3. In the **Add New Case**dialog box, under**Case Tags** , specify the following:

NONE	BY DEFAULT, THE NONE OPTION IS SELECTED DURING CREATING A CASE, INDICATING NO TAG APPLIED TO THE CASE.
	SELECT THIS OPTION IF YOU DO NOT WANT TO ADD PARENT AND CHILD TAGS TO THE CASE.
Custom	Select this option to customize new parent and child tags for the case. Upon selecting this option, the Customize Case Tags option appears. Click this option to open the New Case Tag dialog box.
View	While editing the case, click this option to view the previously applied tags.
	This option remains disabled if you are creating a new case.

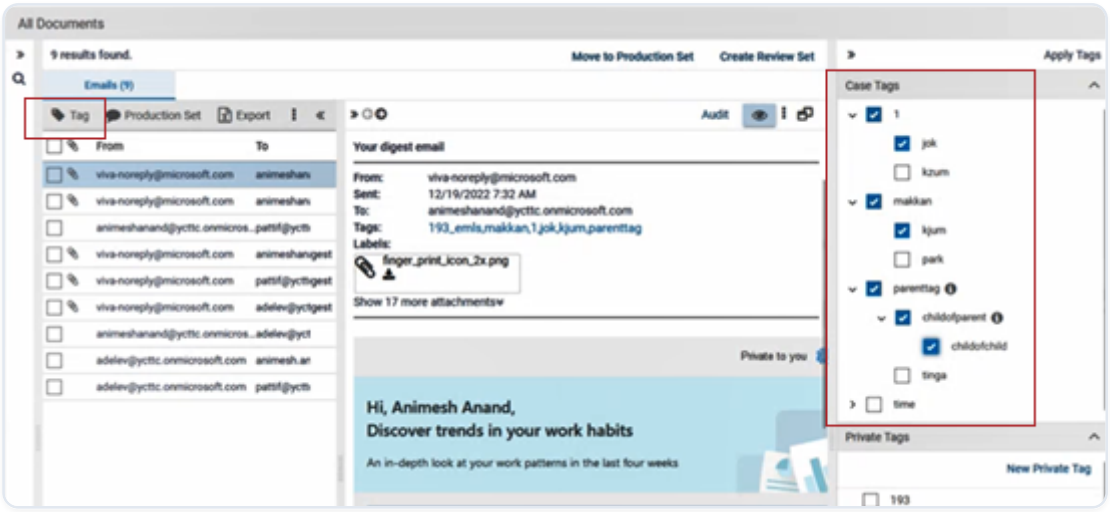
4. In the **New Case Tag** dialog box, specify the following:

TAG NAME	ENTER A UNIQUE TAG NAME, LIMITED TO A MAXIMUM OF 50 CHARACTERS.
Comments	Enter a description or comment to the parent tag to clarify its role.
Child Tag Selection Required	Select this check box to enforce including at least one of its child tags when applying this parent tag to a case.
Add Child > Tag Name	Enter a unique child tag name, limited to a maximum of 50 characters.
Add Child > Comments	Enter a description or comment to the child tag to clarify its role.

TAG NAME	ENTER A UNIQUE TAG NAME, LIMITED TO A MAXIMUM OF 50 CHARACTERS.
Children > Comments	Displays the child tags (a maximum of 10 child tags) added under this parent tag.

5. Click **Done**.

Apply this parent tag and its child tags to cases as needed as shown in the sample image below. See Applying tags to the searched items in cases.



Note: Before applying tags to the review items, it is essential to understand the following facts: While creating a parent tag, if you have not selected theChild Tag Selection Requiredoption, you can apply the parent tag to selected items from cases with or without selecting its child tag. While creating a parent tag, if you have selected theChild Tag Selection Requiredoption, you cannot apply that tag to selected items from cases without selecting at least one child tag. TheInfoicon appears alongside for easy identification of such parent tags. If you attempt to apply such parent tags without selecting a child tag, anErroricon appears next to the parent tag, instructing you to select at least one child tag. If you attempt to remove preselected child tags, aCautionicon appears, indicating you cannot remove them. Therefore, before applying such parent tags, ensure that you have selected at least one child tag of that parent.

Applying tags to the searched items in cases

To apply tags to the searched items in a case

1. From the **eDiscovery**tab, select the**Cases** node to display the cases list.
2. Select the required case from the cases list.

Under the **Cases**node in the left pane, a***case_name*** node appears for the selected case.

1. Click the ***case_name*** node to display the case details such as summary, case documents, research set, review set, and so on.
2. Execute a new search or select case documents, research set, or other nodes to get the items in the item grid.
3. From the **Email** tab, select one or more items to which you want to apply tags, and do any of the following:
    - Click **Tag** from the action bar and select any of the following options as required.
        - To tag all the items in the search, click **Tag all emails**.
        - To tag all the items in the current page, click **Tag current page**.
        - To tag only the selected items, click **Tag selected emails**.
    - Select the **Apply Tags** panel provided in the right side.

The application displays the **Apply Tags**panel as shown in the sample image below. Expand**Case Tags**/**Private Tags** and select the multiple relevant tags.

> “ ”

Note: Before applying tags to the review items, it is essential to understand the following facts: While creating a parent tag, if you have not selected theChild Tag Selection Requiredoption, you can apply the parent tag to selected items from cases with or without selecting its child tag. While creating a parent tag, if you have selected theChild Tag Selection Requiredoption, you cannot apply that tag to selected items from cases without selecting at least one child tag. TheInfoicon appears alongside for easy identification of such parent tags. If you attempt to apply such parent tags without selecting a child tag, anErroricon appears next to the parent tag, instructing you to select at least one child tag. If you attempt to remove preselected child tags, aCautionicon appears, indicating you cannot remove them. Therefore, before applying such parent tags, ensure that you have selected at least one child tag of that parent.

> “ ”

1. Click **Apply**.

Removing tags of the searched items in cases

To remove tags of the searched items in a case

1. From the **eDiscovery**tab, select the**Cases** node to display the cases list.
2. Select the required case from the cases list.

Under the **Cases**node in the left pane, a***case_name*** node appears for the selected case.

1. Click the ***case_name*** node to display the case details such as summary, case documents, research set, review set, and so on.
2. Execute a new search or select case documents, research set, or other nodes to get the items in the item grid.
3. Select one or more items of which you want to remove tags.
4. Click **Tag**from the action bar and select**Remove from Tag**.

The **Remove Tags** panel appears.

1. Select the parent and child tags that you want to remove, and click **Remove**.

   > “ ”

   Note: If theChild Tag Selection Requiredoption is selected for a parent tag, theInfoicon appears alongside for easy identification. The application does not allow you to remove the child tags. If necessary, you can remove the entire parent tag. To understand the facts about such parent tags, SeeApplying tags to the searched items in cases.

   > “ ”

Viewing case details

To view the details of a case

1. On the **eDiscovery**tab, select the**Cases** node to display a list of cases.

If you are a reviewer, Insight eDiscovery lists only those cases to which you have been assigned.

1. If you have the required permissions the **Hide Completed** check box is available above the case list. To list only the active cases, select the check box.
2. To view the details of a case, select a case from the Case List. A summary of the reviewers and custodians for the case appears below the list.

Under the **Cases**node in the left pane a***case_name*** node appears for the selected case. This node contains a number of sub-nodes that provide details of the case as follows. The available options depend on your permissions:

- ***case_name***: Click this node to display the**Edit Case** pane. If you have the required permissions you can edit the details of the case in this pane.

See Editing cases.

- **Summary** : Click this node to view a Case Information Summary table.
- **Case Documents** : Click this node to view Collection Sets and Archive Sets created for the corresponding case. You can easily differentiate these sets as the icons are different for them.
    - **Collection Set**: When you collect the items from Targeted Collectors, the document set is called an**Collection Set**.
    - **Archive Set**: When you collect the items from Archives, the document set is called an**Archive Set**.
    - **All Documents** : When you want to see documents from collection sets and archive sets of a case, click this node.
- **New Search** : From this node you can perform new searches. or run any saved searches that are related to the case.

See Performing searches within cases.

- **Research Set** : A Research Set is a collection of searches saved in a particular case. These searches are not assigned to reviewers. Emails continue to be added to Research Sets until a reviewer is assigned. Click this node to view the case-specific searches saved for preliminary research.
- **Review Set** : A Review Set is collection of searches saved for a particular case. Searches are assigned to the reviewers of the case. You can allocate a percentage of the search results to each reviewer. Click this node to view the case-specific searches saved for review.
- **Tags** : Click this node to view all of the tag assignments for the case.

- **Production Sets** : Click this node to view all the production sets created within a case.
- **Exports** : Click this node to view the exports-specific details of the selected case.
- **Case History** : Click this node to view a table of actions that were performed on this case.

Editing cases

Administrators and reviewers with the appropriate permissions can edit the cases to which they are assigned, and for which they have been granted edit permission.

To edit a case

1. From the **eDiscovery**tab, select the**Cases** node to display the cases list in the main pane.
2. Select the required case from the cases list.

Under the **Cases**node in the left pane a***case_name*** node appears for the selected case.

1. In the left navigation pane, click the ***case_name*** node to display the case details pane.
2. Edit the case details as required. Review the following table for more information.

> “ ”

Note: If you do not have edit permissions, the settings are not changeable.

> “ ”

CASE STATUS	YOU CAN EDIT THE CASE-LEVEL LEGAL HOLD STATUS.
	YOU CAN ALSO SET THE CASE STATUS TO INACTIVE OR COMPLETED . SETTING THE STATUS TO INACTIVE DISABLES ALL FUNCTIONALITY FOR WORKING WITH THE CASE.
Case Details	You can edit the case name, description, case filing date, case expiration date, case type, department, matter number, docket number, and notes. You can add additional staff members to the case.

CASE STATUS	YOU CAN EDIT THE CASE-LEVEL LEGAL HOLD STATUS.
	YOU CAN ALSO SET THE CASE STATUS TO INACTIVE OR COMPLETED . SETTING THE STATUS TO INACTIVE DISABLES ALL FUNCTIONALITY FOR WORKING WITH THE CASE.
Custodians for Case	You can add or remove the custodian archives to monitor for the case.
Reviewers for Case	You can add or remove reviewers or edit reviewer permissions for the case.
Reassign Items	You can reassign items from one reviewer to another reviewer.
Customizations	You can change the Review Status available for the case.
Redaction Reasons	You can change the redaction reasons available for the reviewers of the case.

> “ ”

Note: ClickRefreshto update the number of items that are included in the selected case and the number of items on legal hold.

> “ ”

3. Click **Save** after you finish editing the case details.

About searches in eDiscovery

This section helps you understand seaches-specific tasks within the cases.

Performing searches within cases

Administrators or reviewers with the appropriate permissions can search the archives that are associated with a selected case.

A search can then be saved and assigned to the case's reviewers as required.

> “ ”

Note: You can now use an advanced search to find the emails, attachments, collaboration chats, and files that include a classification tag. The Arctera Insight Classification assigns classification tags to emails, attachments, collaboration chats, and files that match an enabled classification policy. The built-in Arctera Insight Classification policies help you to locate any emails that may infringe your corporate policies or regulations.

> “ ”

To perform a new search of a case

1. On the **eDiscovery**tab, select**Cases** to view a list of cases.
2. Search for and select the required case from the list of cases.

Under the **Cases** node, in the left pane, a *case_name* node appears for the selected case.

1. Select the ***case_name***node >**New Search**.
2. Perform advanced search or query search to get the expected items. See Performing Advanced Search and Query Search.
3. Click **Search**.

   > “ ”

   Note: The results of an Advanced Search include aRelevancecolumn. The length of the bar in this column represents how closely the item matches the search criteria, relevant to the other items in the results.

   > “ ”

4. Click **Save Search**.

See Saving searches in Review sets and Research sets.

Saving searches in Review sets and Research sets

If you have the required permissions you can save a search of a case. A search of a case can be saved as a Research Set or a Review Set.

- A Research Set is not assigned to reviewers. emails and collaboration messages and files continue to be added to Research Sets until a reviewer is assigned.
- A Review Set is assigned to the reviewers of the case. You can allocate a percentage of the search results to each reviewer.
- Additionally, you can select *No Allocation* in case you want to assign zero percentage to all reviewers. In this case, items are not assigned to any single reviewer. Any reviewer can again review and tag the items that are reviewed and tagged before. The review tag can be changed by another reviewer.

To save a search of a case

1. Perform a new search on the case.

See Performing searches within cases.

1. Click **Save Search**.
2. In the **Save Search** dialog box, provide the following information:

ENTER SAVED SEARCH NAME	ENTER A NAME FOR THE SAVED SEARCH.
Legal hold	Select to place all items in the saved search on legal hold. Items that are on legal hold cannot be deleted from the archive.
Assign Create Review Set	Select this check box to assign the search results to the reviewers of the case.
	The Create Research Set dialog displays a list of reviewers of the case. Select one of the following options to assign items to reviewers.
	- No assignment : No specific percentage of items are assigned to any single reviewer. Items that are reviewed and tagged by any of the reviewers can be edited and tagged by other reviewers.

ENTER SAVED SEARCH NAME	ENTER A NAME FOR THE SAVED SEARCH.
	- Custom assignment : You can decide specific percentage of items to reviewers. The total allocation percentage must be 100 percent. If the case has only one reviewer, Insight eDiscovery automatically assigns all items to the reviewer.
	- Assign equally to all reviewers : The application equally distributes percentage of items among reviewers.
	- Allow shared reviews : Select this check box to allow reviewers to access and review items assigned to other reviewers. If you have selected the Custom Assignment or the Assign equally to all Reviewers option, you can clear this check box to restrict reviewers to access and review items assigned to other reviewers. If you have selected the No Assignment option, this check box is selected by default. You cannot clear it.
	Note: If you do not selectCreate Review Set, the search is saved as a Research Set. Items continue to be added to a Research Set until it is assigned to the reviewers and so becomes an Assigned Search.

3. Click **Save** to save the search.

   - If you selected the **Create Review Set**check box, the search is saved under the**Review Sets** node.
   - Otherwise the search is saved under the **Research Sets** node.

Viewing previously executed but unsaved searches in cases

While working with cases, you may often run a search and retrieve the data, but knowingly or unknowingly do not save it. In such scenarios, the application logs the search under *eDiscovery>Case Name>Case Documents>Previous Searches* node. This allows you to refer to

your previously executed but unsaved searches within cases when needed. You can rerun the same search and save it for future investigative purposes.

To view previously executed but unsaved searches in a case

1. In the left navigation pane, select **eDiscovery**> *Case Name* >**Case Documents**>**Previous Searches** node.

A list of previously executed but unsaved searches within the selected case. Use the page navigation arrows to access cases displayed on other pages.

1. To view the search-specific details, click **Show info** in the row corresponding to the search.
2. If needed, select the search and do the following:

   - Click **Export Report** to share with the concerned people.
   - Select the **Hide Completed** check box to list only the active cases.

   > “ ”

   Note: This checkbox is visible only to users with the necessary permissions. Please contact your administrator if you require this permission. **Note:** Department Reviewers may encounter certain role-specific limitations. For details, SeeKnown limitations affecting the Department Reviewer role.; these are known, low-impact issues targeted for resolution in the next release.

   > “ ”

Modifying saved searches of cases

You can view the results of a saved search of a case. If the saved search is a Research Set, you can also change its name, create a new search with the same criteria.

> “ ”

Note: You cannot modify Assigned Searches.

> “ ”

To view or update a saved search of a case

1. On the **eDiscovery**tab, select**Cases** to view a list of cases.
2. Search for and select the required case from the list of cases.
3. Under the **Cases**node, in the left pane, a***case_name*** node appears for the selected case.
4. Select the ***case_name***>**Research Sets**or**Review Sets**
5. Select the required search under the Research Sets or the Review Sets node or the node.

The search displays its results.

1. To change the name of a Research Set or to clone it, click **Update Saved Search** in the menu bar.

   > “ ”

   Note: You cannot modify Assigned Searches.

   > “ ”

2. Update the information in the **Saved Search** dialog as required. See the following table for more information:

ENTER SAVED SEARCH NAME	PROVIDE A NEW NAME FOR THE SEARCH.

Then select an option for modifying the search as follows:

SAVE AS NEW	SELECT TO CREATE A NEW RESEARCH SET WITH THE NEW NAME.
	THE CURRENT SEARCH IS UNAFFECTED.
Update	Select to update the existing Research Set with the new name.

Applying a search-level legal hold

Accounts with the appropriate permissions can place items from a search on legal hold. Applying a search-level hold ensures that specific items remain on hold even if a case-level legal hold is removed.

You can apply a search-level legal hold to Research or Review sets.

To apply a search-level legal hold

1. On the **eDiscovery**tab, select**Cases** to view a list of cases.
2. Search for and select the required case from the list of cases.
3. Under the **Cases**node, in the left pane, a***case_name*** node appears for the selected case.
4. Select the ***case_name***>**Research Sets**or**Review Sets**
5. Select the required search under the Research Sets or the Review Sets node or the node.

The search displays its results.

1. In the top-right corner, click **Apply Search Legal Hold**.

> “ ”

Note: To remove a legal hold after it has been applied, select the same search, and clickRemove Search Legal Hold.

> “ ”

Assigning review sets to reviewers

Administrators or reviewers with the appropriate permissions can assign the results of a Research Set for a case to various reviewers to expedite the eDiscovery process.

> “ ”

Note: After assigning a search to reviewers, it cannot be edited.

> “ ”

To assign a Research Set to reviewers

1. From the **Research Sets**node of a case, select a**Saved Search**.
2. Click **Create Review Set**. The**Assign Emails for Review** dialog displays a list of the case's reviewers.

   > “ ”

   Note: You can create a Review Set only if the total number of items is 250,000 or less. If your current search result or Archive Set has more than 250,000 items, theCreate Review Setbutton will be disabled.

   > “ ”

3. Select one of the following options to assign items to reviewers.

NO ASSIGNMENT	NO SPECIFIC PERCENTAGE OF ITEMS ARE ASSIGNED TO ANY SINGLE REVIEWER. EMAILS THAT ARE REVIEWED AND TAGGED BY ANY OF THE REVIEWERS CAN BE EDITED AND TAGGED BY OTHER REVIEWERS.
Custom assignment	You can decide specific percentage of items to reviewers.
	The total allocation percentage must be 100 percent. If the case has only one reviewer, Insight eDiscovery automatically assigns all items to the reviewer.
Assign equally to all reviewers	The application equally distributes percentage of items among reviewers.
Allow shared reviews	Select this check box to allow reviewers to access and review items assigned to other reviewers.
	If you have selected the Custom Assignment or the Assign equally to all Reviewers option, you can clear this check box to restrict

NO ASSIGNMENT	NO SPECIFIC PERCENTAGE OF ITEMS ARE ASSIGNED TO ANY SINGLE REVIEWER. EMAILS THAT ARE REVIEWED AND TAGGED BY ANY OF THE REVIEWERS CAN BE EDITED AND TAGGED BY OTHER REVIEWERS.
	reviewers to access and review items assigned to other reviewers.
	If you have selected the No Assignment option, this check box is selected by default. You cannot clear it.

4. Click **Save**.

Insight eDiscovery automatically moves the search to the **Review Sets** node.

Generating a search summary report

Any user who has access to the New Searches node, the On-going Searches node, the Standard Searches node, and the Advanced ECA node on the Investigations tab can generate a printable report of searches.

Any user who has access to the New Searches node, the Research Set node, and the Review Set node on the eDiscovery tab can generate a printable report of searches.

To generate a printable report for searches on the Investigations tab

1. On the **Investigations** tab, expand the New Searches node, the On-going Searches node, the Standard Searches node, and the Advanced ECA node as required.
2. Select the search for which you want to export the printable report.
3. On the action menu bar, click the *More Options* icon, and click **Export Report**.

The application generates a report with the information about custodians, the parameters, and the results.

To generate a printable report for searches on the eDiscovery tab

1. On the **eDiscovery**tab, expand the**New Searches**node, the**Research Sets**node, or the**Review Sets** node.
2. Select the search for which you want to export the printable report.

3. On the action menu bar, click the *More Options* icon, and click **Export Report**.

The application generates a report with the information about custodians, the parameters, and the results.

Managing case documents

This section includes the following topics:

- Understanding document sets in cases
- Moving case documents to production sets
- Understanding Archive Search

Understanding document sets in cases

For cases, you can collect documents from Targeted Collectors and Archives (new searches, saved On-going/Standard searches, and saved research sets).

When you collect the items from targeted collections, the document set is called an Collection Set.When you collect the items from archives, the document set is called an Archive Set. You can create new Collection and Archive Sets while sending the search results from the Investigation tab to cases under the eDiscovery tab. These sets are saved and displayed in the eDiscovery tab. After you select the case, you can view such Collection and Archive Sets under Case Documents.

Use Advance Search to filter the result. The Query Search is not supported for case documents.

Case Documents support tagging, creating production sets, exporting, and exporting report. Tagging and exporting by custodians is not supported.

Moving case documents to production sets

You can move emails, collaboration messages, and files from the case documents to the unlocked production sets only, and not to the locked production sets. You need to unlock the production sets before moving these items to the locked production sets.

To move case documents to production sets

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to search emails.

The selected ***Case_Name*node appears below Cases**.

1. Click **Case Documents** and select a set of documents from which you want to move items to document set.

The available emails, collaboration messages, and files are displayed.

1. To further filter the items from the case document set, use the **Advanced Search**or the**Query Search** tabs.

If you are performing the Advanced Search in Case Documents node, a new filter attribute - **Custodians**\- is available along with other attributes under the**Filter** facet. This filter attribute is available only for the Case Documents node.

> “ ”

Note: TheCustodiansfilter attribute is not available in theAdvanced Searchtab of any other node. When you expand theCustodiansattribute, the application displays a top few custodians and aShow moreoption. ClickShow moreto open theSelect Custodiansdialog box.

> “ ”

1. Set the filter criteria to further refine your items search, and click **Search**.

The filtered emails, collaboration messages, and files are displayed.

1. To move all the emails, collaboration messages, and files from the result, click **Move to Production Set**.
2. To move emails only, on the **Emails**tab, select the emails you want to include in the production set. Click**Production Set** , and do any of the following:
   - Click **Move all emails** to include all the emails available in the search.
   - Click **Move current page** to include all the emails displayed on the selected page.
   - Click **Move selected emails** to include all the selected emails from the search.
3. To move collaboration messages, on the **Collaboration**tab, select the emails you want to include in the production set. Click**Production Set** , and do any of the following:
   - Click **Move all messages** to include all the collaboration messages available in the search.
   - Click **Move selected messages** to include all the selected collaboration messages from the search.
4. To move files, on the **Files**tab, select the files you want to include in the production set. Click**Production Set** , and do any of the following:

- Click **Move all files** to include all the files available in the search.
- Click **Move selected files** to include all the selected files from the search.

5. In the **Production Set** dialog box, specify the following:

NEW PRODUCTION SET	SELECT THIS OPTION IF YOU WANT TO MOVE THE SELECTED EMAILS IN A NEW PRODUCTION SET. THIS OPTION IS SELECTED BY DEFAULT.
	IN THE PRODUCTION SET NAME FIELD, ENTER A UNIQUE NAME FOR THIS PRODUCTION SET.
	IN THE DESCRIPTION FIELD, ENTER A BRIEF DESCRIPTION OF THE PRODUCTION SET.
Existing Production Set	In the Production Set Name drop-down list, you can view only the unlocked production sets. You can not move emails to the locked production set.
	In the Production Set Name drop-down list, select a set to which you want to move (add) the selected emails.
	The description of the selected production set appears for your reference.

6. Click **Submit**.

If you have created a new production set, the application displays the *Production set created successfully* message. This newly created production set gets listed under **eDiscovery**tab >**Cases**> *Case_Name* >**Production Set**.

If you have moved the items to an existing production set, the application displays the *Production set updated successfully* message.

Understanding Archive Search

This section explains what archive search is and how you can create a Research Set and Archive Set.

About Archive Searches

During case management, the Archive Search feature lets you:

- Create new searches

You can use *Advanced Search*and*Query Search* to refine the data collected by archive collectors, and then save the search for further research.

- View previous unsaved searches

You can access previously executed but unsaved searches.

- Save searches under Research Set for further research

Upon saving the search, it appears under Research Set. You can update or delete these saved searches anytime as needed. If you are satisfied with the searched data and want to move this data to any case, create a new Archive Set. This archive set appears under Case Documents.

Next steps

The Archive Sets can be updated or deleted from the Case Documents as needed. From the Archive Set, a new Review Set can be created and assigned to corresponding reviewers to expedite the discovery process or can be moved to the Production Set.

Creating research sets and archive sets

> “ ”

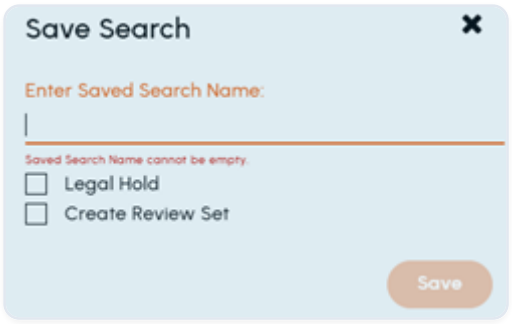
Note: You may encounter certain minor limitation. For details, SeeKnown limitations affecting the Department Reviewer role.; these are known, low-impact issues targeted for resolution in the next release.

> “ ”

To create research set and archive set

1. On the **eDiscovery** tab, select a case you want to work on from the list of cases.
2. In the left navigation pane, select **Archive Search** and perform any of the following as required.
    - Select **New Search** and do the following:

- Use *Advanced Search*and*Query Search* to refine the data collected by archive collectors.
- If you are satisfied with the resulted data and want to save it, click **Save Search**. The**Save Search** dialog box appears.



Provide the following details and click **Save**.

- Enter a unique search name.
- To apply a legal hold to this search, select the **Legal Hold** check box.
- To create a review set of the searched items, select the **Create Review Set** check box.

> “ ”

Note: You can create a Review Set only if the total number of items is 250,000 or less. If your current search result or Archive Set has more than 250,000 items, theCreate Review Setcheck box will be disabled.

> “ ”

- To save the search as **Research Set**, do not select the**Create Review Set** check box.
- If you are confident that the data can be moved directly to the case without saving it as Research Set, click **Create Archive Set**. In the *Create Archive Set* dialog box, specify the following fields, and click**Save**.

CASES	SEARCH AND SELECT THE CASE IN WHICH YOU WANT TO CREATE AN ARCHIVE SET AND DOCUMENTS ACCORDINGLY.
Archive Set name	To create a new Archive Set, select New and provide a unique name for the archive set you want to create.
	To send the items in the existing Archive Set, select Existing . The application displays a list of existing archive sets, then select the required archive set.
	Sending this search result from Investigations to a Case in eDiscovery ignores the custodian(s) selected in the Case setup.

> “ ”

Note: The default limit for sending search results to an archive set is 250,000 items, including emails, collaboration messages, and files.

> “ ”

Upon saving, it appears under the **Case Documents** node.

- Select **Previous Searches** to access previously executed but unsaved searches.
  - Identify the search you want to run again and click **Rerun Search** in the *Action* column of the corresponding row to retrieve the search result.
  - Use *Advanced Search*and*Query Search* to refine the data collected by archive collectors.
  - If you are satisfied with the searched data and want to save it, click **Save Search**. Upon saving the search, it appears under**Research Set**.
  - If you are confident that the data can be moved directly to the case without saving it as Research Set, click **Create Archive Set**.
  - In the *Create Archive Set* dialog box, specify the fields mentioned in the table above, and click **Save**.

Upon saving, it appears under the **Case Documents** node.

- Expand **Research Set** and select a required research set for further action.

  > “ ”

  Note: If the research set contains 250,000 or more items, theCreate Review Setbutton remains disabled.

  > “ ”

  - If you are confident that the data can be moved to the case, click **Create Archive Set**.
  - In the *Create Archive Set* dialog box, specify the fields mentioned in the table above, and click **Save**.

Upon saving, it appears under the **Case Documents** node.

Managing redaction reasons

This section includes the following topics:

- About redaction reasons
- Adding redaction reasons
- Editing redaction reasons
- Deleting redaction reasons

About redaction reasons

Redaction reasons are the reason codes that lets reviewers justify a reason of redaction in the document. You can create, edit, and delete redaction reasons. Redaction reasons can be applied on the documents while adding redactions. Redactions and redaction reasons can be applied to the document from the Native view of the document.

Adding redaction reasons

To add a redaction reason

1. On the **eDiscovery**tab, select**Review Status**.
2. Click **Add Row**.
3. In the newly added row, do the following:
    - In the **Name** column, enter a unique reason name in brief.
    - In the **Description** column, describe the reason in detail.
    - Select the **Active** column to keep this reason available in the system.

Clear the check box if you want to deactivate this reason.

1. Click **Save**.

Editing redaction reasons

You cannot edit a redaction reason if that reason is applied to any of the redactions marked in any of the documents. Such redaction reasons remain disabled for editing. The reasons that are not applied to any redaction can be edited any time.

To edit a redaction reason

1. On the **eDiscovery**tab, select**Review Status**.
2. Search for and select the reason that you want to modify.
3. In the **Name** column, click the redaction reason name. The field becomes editable. Modify the reason name in brief, if required.
4. In the **Description** column, click the redaction reason name. The field becomes editable. Modify the reason description, if required.
5. Select or clear the **Active** column to keep this reason active or inactive respectively.
6. Click **Save**.

Deleting redaction reasons

You cannot delete a redaction reason if that reason is applied to any of the redactions marked in any of the documents. The reasons that are not applied to any redaction can be deleted any time.

To delete a redaction reason

1. On the **eDiscovery**tab, select**Review Status**.
2. Search for and select the reason that you want to delete.
3. Click **Delete Row**.

Managing reviews

This section includes the following topics:

- About reviewing cases
- Reviewing emails
- Reviewing collaboration messages
- Reviewing files
- Annotating and redacting email and file content in native viewer

About reviewing cases

As a reviewer of a case in the eDiscovery tab, you see only the resulting emails, attachments, collaboration chats, and files from the case searches that are assigned to you. You work with those emails, attachments, collaboration chats, and files to identify the content of interest. Insight eDiscovery provides review status tags, custom tags, and labels, all of which you can apply to emails, attachments, collaboration chats, and files to help you manage the review process. You can then discover the emails, attachments, collaboration chats, and files by tag name.

You can also add case-specific notes to an email that another reviewer who works on the same case can see.

Additionally, the eDiscovery function includes various reporting features. These features allow reviewers to view audit trails for individual email, attachment, collaboration chat, and file or for the history of an entire case.

Reviewing emails

The Emails tab appears only if the Exchange Online service is enabled and the archive collector is configured for you. You can review all the emails that are coming from the Exchange Online. While reviewing the emails, you can perform the following actions:

- Applying tags
- Creating and exporting production sets
- Copying Insight Surveillance Id to search exact item for review
- Exporting emails

- Exporting summary report
- Viewing audit history
- Adding notes
- Applying review status
- Printing emails
- Restoring emails
- Forwarding emails

Accessing emails for review

To access emails for review

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to search emails.
3. The selected ***Case_Name*node appears below Cases**.
4. Click **New Search**to create a new search. Else, expand**Research Sets**or**Review Sets** to select existing search.

You can access existing saved searches of the selected case from the **Review Set**and**Research Set** nodes. Alternatively, Perform advanced search or query search to get the expected items. See Performing Advanced Search and Query Search.

After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

1. Click the **Emails** tab.
2. Select the email to view its details in the **Preview** pane.

> “ ”

Note: Insight eDiscovery does not support previewing certain file types, such as .dll and .exe and large files (over 30 MB to maintain browser responsiveness). For compressed files, Insight eDiscovery supports previewing only the .zip file format and does not support other formats like .7z, .tar, and so on. If you cannot preview a specific file type, simply download it and use the appropriate tools to view its content.

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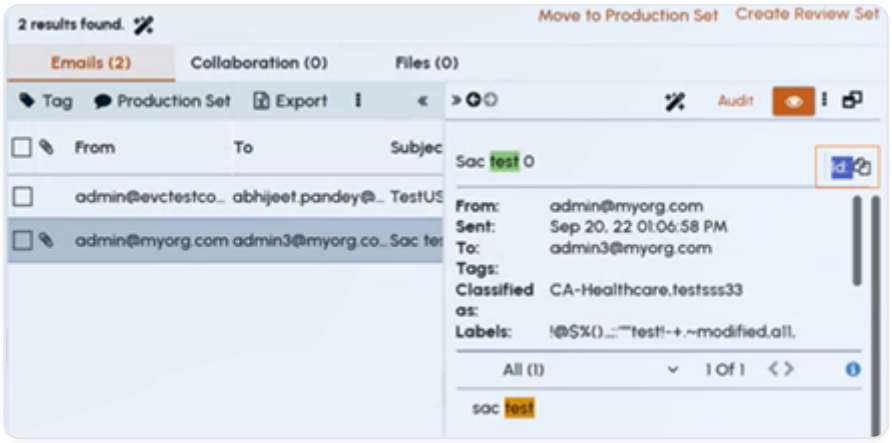
Searching for the exact Insight Surveillance item for review

To search for the exact Insight Surveillance item

1. Browse the archives of accounts that are assigned to you. Conduct a search to filter the required items.
2. Select the item to preview its content.
3. If the item originates from Insight Surveillance, its document ID appears in the preview pane, as shown in the example below.



4. Click the **Id** icon to copy the item ID.
5. In the Advanced Filter pane, expand the **Item Id Filter** , and paste the copied item Id.

> “ ”

Note: When theItem ID Filterfacet is used, all other filter facets are cleared to allow searching for only the exact matching Item ID in the archive.

> “ ”

6. Click **Search** to view the exact item in the preview pane.

Applying tags to emails

To help organize your work you can tag emails with custom tags of your own choosing, which are visible only to you. You can also tag emails with a managed tag, if you have any of these available

to you. Managed tags are created in the Arctera Insight Management Console, under the My Config > Managed Tags node. For more information on managed tags, see the Archive Administration Help.

To apply tags to emails

1. Browse the archives of accounts that are assigned to you, or conduct a search, or view the **Review Status Tags** for a case that is assigned to you.
2. Click on emails to view its details in the preview pane.
3. Select the emails you want to tag, and click **Tag**.
   - To tag only the selected emails, click **Tag selected emails**.
   - To tag all the emails displayed on the page, click **Tag current page**.
   - To tag all the emails in the search, click **Tag all emails**.
4. In the **Add Tag** dialog box, do the following:

TAG NAME	ENTER A NEW UNIQUE TAG NAME.
Comments	Provide a comment or a description for the tag name.
Legal Hold	Select this check box if you want to apply the legal hold on the emails.
Select retention Tag	Instead of applying a new tag, you can apply the retention tags that are created in Arctera Insight Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply.

5. Enter a tag name and description for the custom tag. Alternatively, you can select the a retention tag, if any are available to you.
6. Click **Tag**.

> “ ”

Note: In theeDiscoverytab, any custom tags you create are listed in theTagsnode of the selected case.

> “ ”

Exporting emails

To export emails

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to search emails.

The selected ***Case_Name*node appears below Cases**.

1. Click **New Search**to create a new search. Else, expand**Research Sets**or**Review Sets** to select existing search.

   > “ ”

   Note: You can access existing saved searches of the selected case from theReview SetandResearch Setnodes. Alternatively, you can clickNew Search, perform advanced search or query search to get the expected items. SeePerforming Advanced Search and Query Search. After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

   > “ ”

2. On the **Emails**tab, select the emails you want to export. Click**Export** , and do any of the following:

   - Click **Export current page** to export all the emails displayed on the selected page.
   - Click **Export selected emails** to export all the selected emails from the search.
   - Click **Export all emails** to export all the emails available search.
   - Click **Export by custodians** to export all the emails from the selected custodians.

3. Click **Export** , and do any of the following:
4. If you are exporting all emails in the search, all emails displayed on the page, or selected emails, in the **Export Options** dialog box, do the following:

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	- PST WITH EDRM
	- MSG WITH EDRM
	- FTI-RINGTAIL
	- EDRM ONLY
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	- ORIGINALEDRM IF YOU SELECT THIS OPTION, THE EXPORTED FILE INCLUDES EMAILS IN BOTH MSG AND EML FORMATS, ALLOWING YOU TO WORK WITH THE EMAILS IN THE FORMAT THAT BEST SUITS YOUR NEEDS. BESIDES THIS, THE EXPORTED FILE INCLUDES ADDITIONAL FILES, NAMELY - EDRMXML.XML AND HTMLREPORT.HTML IN THEIR ORIGINAL FORMATS. THESE FILES FACILITATES A SMOOTH TRANSFER OF ELECTRONICALLY STORED INFORMATION (ESI) BETWEEN DIFFERENT SOFTWARE PROGRAMS DURING THE ELECTRONIC DISCOVERY PROCESS.
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MESSAGE FORMAT	THE AVAILABLE MESSAGE FORMATS ARE\:
	- CLEARWELL
	- EML
	- EML WITH EDRM
	- PST WITH EDRM
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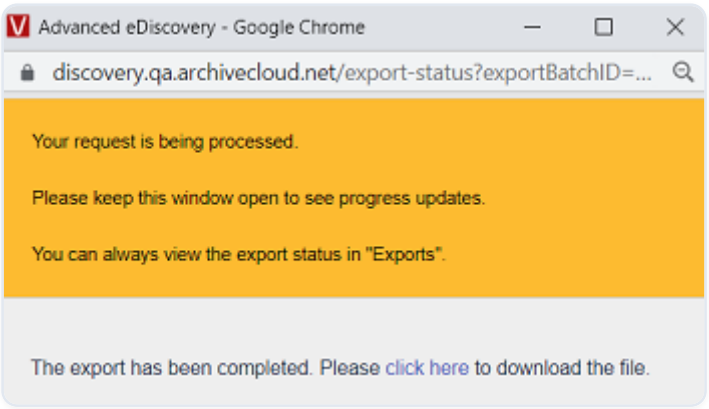
5. If you are exporting emails by custodians, in the **Add/Remove Custodians** dialog box, search for and select the custodians.
6. Click **Export**.

> “ ”

Note: The exported batch can either gets downloaded as a single or multiple file segments.

> “ ”



7. Click **Click here** to download the exported batch of emails.
8. To confirm the status of batch export, on the **eDiscovery**tab, under the selected case node, select**Exports** , and search this export batch name.

Exporting a search summary report for emails

To export a search summary report for emails during case review

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to search emails.
3. The selected ***Case_Name*node appears below Cases**.
4. Click **New Search**to create a new search. Else, expand**Research Sets**or**Review Sets** to select existing search.

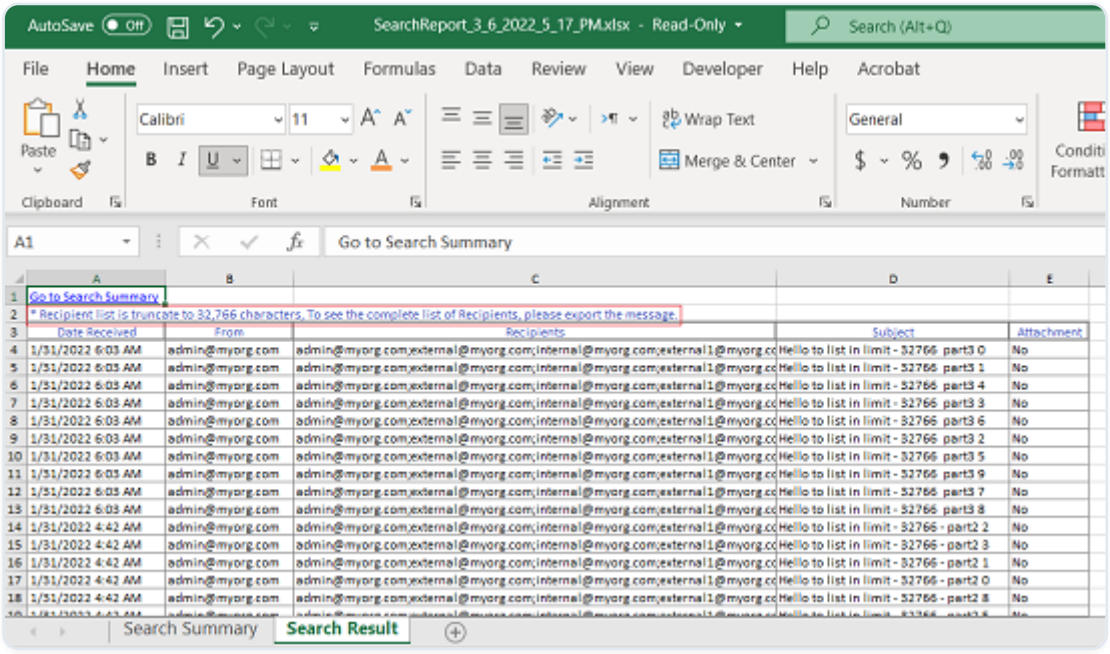
You can access existing saved searches of the selected case from the **Review Set**and**Research Set**nodes. Alternatively, you can click**New Search** , specify a new criteria in the *Advanced Search*or the*Query Search* option to search for new emails for review.

After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

1. On the **Emails**tab, click the**More Actions**icon, and click**Export Report**.

> **Note:** The following sample image is specific to a search inReview Sets. If you select the search fromResearch Sets, the application do not show theReview Statusand theMessage Legal Holdoptions on the action bar.

The application downloads the summary report (.xlsx) of the emails within the search as a zipped (.zip) folder. A sample report is shown below. The report comprises of two sheets.



The **Search Summary** sheet displays details such as Search Parameters and Custodians.

The **Search Result** sheet displays details such as Date Received, From, Recipients, Subject, and Attachments. The recipient column in this summary report includes recipients mentioned in the To, CC, and BCC fields. If the list of recipients is longer than 32766 characters, the application truncates the list. The report displays a note that - *Recipient list is truncate to 32,766 characters, To see the complete list of Recipients, please export the message.* In such scenario, to view the complete list of recipients, you need to export the individual message.

> “ ”

Note: If you select a search fromReview Sets, and select any filter option and clickApply, theExport Reportoption remains disabled.

> “ ”

Adding notes to emails

Reviewers can add notes to emails that are visible to other reviewers of that case. Notes are case-specific, therefore, a note that is applied to an email in one case does not appear for the same email in a different case. Notes can be provided to emails that are from the Review Sets only. You cannot provide notes to the emails that are from the Research Set.

To add a note to an email

1. From the **eDiscovery**tab, select the**Cases** node to display the cases list in the main pane.
2. Select the required case from the cases list.

Under the **Cases**node in the left pane a***case_name*** node appears for the selected case.

1. Click the ***case_name***>**Review Sets**.
2. Select the required search under the Review Sets node.
3. On the **Emails** tab, select the email to view its details in the preview pane.
4. Click the **More options**icon and select**Notes**.
5. In the **Add Notes** dialog box, specify the note about this message.
6. Click **Add** to save the note.

> “ ”

Note: Different reviewers can add and save their notes for the same email. The application displays all the notes applied to the email that can be used for a collaborative reviews.

> “ ”

Applying review status to emails

Case reviewers can apply one of the following default review status to emails to indicate its status in the eDiscovery review process:

- Not reviewed
- Escalate
- Irrelevant
- Privileged
- Redact
- Relevant

In addition, the eDiscovery Administrators can customize the available review status options.

To apply review status to emails

1. Under the associated case, select **Review Set** , and open the corresponding review set node.
2. To apply review status to one or more emails directly from the **Review Set** :
   - Select the check box for one or more emails in the list, and click **Review Status** on the action bar.
   - Then select the required review status.
3. To apply a review status to an email while you view its details:
   - Select the email from the **Review Set** list to display its details in the preview pane.

The review status is shown at the top of the preview pane that displays the details of the message.

- Click the required review status from the row of review status options.

  > “ ”

  Note: To view emails based on their review status, you can filter the required review status node under theFiltersection.

  > “ ”

Viewing audit history of emails

To view the audit history of a emails

1. From the **eDiscovery**tab, select the**Cases** node to display the cases list in the main pane.
2. Select the required case from the cases list.

Under the **Cases**node in the left pane a***case_name*** node appears for the selected case.

1. Click the ***case_name***>**Research Sets**or**Review Sets**.
2. Select the required search under the Research Sets or the Review Sets node.
3. On the **Emails** tab, select the emails to view its content in the preview pane.
4. On the Preview pane, click **Audit**.

The application displays the audit history.

1. If required, use the navigation icons to go to the next page, previous page, the first page, and the last page.

Printing emails

To print emails

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to search emails.
3. The selected ***Case_Name*node appears below Cases**.
4. Click **New Search**to create a new search. Else, expand**Research Sets**or**Review Sets** to select existing search.

You can access existing saved searches of the selected case from the **Review Set**and**Research Set**nodes. Alternatively, you can click**New Search** , specify a new criteria in the *Advanced Search*or the*Query Search* option to search for new emails for review. After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

1. Click the **Emails** tab.
2. Select the email to view its details in the Preview pane.
3. Click the **More options**icon and select**Print**.

The entire email content appears on a browser.

1. Click **Print** to save the email on your local computer.

Restoring emails

To restore an email

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to search emails.
3. The selected ***Case_Name*node appears below****Cases**.
4. Click **New Search**to create a new search. Else, expand**Research Sets**or**Review Sets** to select existing search.

You can access existing saved searches of the selected case from the **Review Set**and**Research Set**nodes. Alternatively, you can click**New Search** , specify a new criteria in the *Advanced Search*or the*Query Search* option to search for new emails for review. After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

1. Click the **Emails** tab.
2. Select the email to view its details in the Preview pane.
3. Click the **More options**icon and select**Restore**.
4. Search for and select the account for which you want to restore the email, and click **Restore**.

Forwarding emails

To forward an email

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to search emails.
3. The selected ***Case_Name*node appears below****Cases**.
4. Click **New Search**to create a new search. Else, expand**Research Sets**or**Review Sets** to select existing search.

You can access existing saved searches of the selected case from the **Review Set**and**Research Set**nodes. Alternatively, you can click**New Search** , specify a new criteria in the *Advanced Search*or the*Query Search* option to search for new emails for review. After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

1. Click the **Emails** tab.
2. Select the email to view its details in the Preview pane.
3. Click the **More options**icon and select**Forward**.
4. In the **Mail Composer**window, draft the email content, and click**Send** to send the original email content to a recipient.

Reviewing collaboration messages

The Collaboration tab appears only if the MS Teams service is enabled and the archive collector is configured for you. You can review all the files that are coming from the MS Teams. While reviewing the messages, you can perform the following actions:

- Applying tags
- Applying legal hold
- Applying review status
- Exporting collaboration messages
- Exporting search summary report
- Adding notes
- Viewing audit history

Accessing collaboration messages for review

To search Collaboration messages during investigation

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to search Collaboration messages.

The selected ***Case_Name*node appears below Cases**.

1. Click **New Search**to create a new search. Else, expand**Research Sets**or**Review Sets** to select existing search.

You can access existing saved searches of the selected case from the **Review Set**and**Research Set**nodes. Alternatively, you can click**New Search** , specify a new criteria in the *Advanced Search*or the*Query Search* option to search for new collaboration messages for review.

After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

1. Click the **Collaboration** tab to view the Chat and Channel messages for your review.
2. Select the collaboration message to view its details in the Preview pane.

> “ ”

Note: Insight eDiscovery does not support previewing certain file types, such as .dll and .exe and large files (over 30 MB to maintain browser responsiveness). For compressed files, Insight eDiscovery supports previewing only the .zip file format and does not support other formats like .7z, .tar, and so on. If you cannot preview a specific file type, simply download it and use the appropriate tools to view its content.

> “ ”

Applying tags to collaboration messages

To apply tags to the collaboration messages during case review

1. From the **eDiscovery**tab, select the**Cases** node to display the cases list in the main pane.
2. Select the required case from the cases list.

Under the **Cases**node in the left pane a***case_name*** node appears for the selected case.

1. Click the ***case_name***>**Research Sets**or**Review Sets**.
2. Select the required search under the Research Sets or the Review Sets node.
3. In the right pane, on the **Collaboration** tab, select the collaboration messages to which you want to apply tags.

> “ ”

Note: Before you apply tags to the items, you can view the previously applied tags and classification tags of the message in the preview pane. In the following sample image, you can see the previously applied tags and classification tags of the collaboration messages when you hover over the icons.

> “ ”

4. On the action menu, click **Tag** , and do any of the following as required.
   - To tag all the items in the search, click **Tag all messages**.
   - To tag only the selected items, click **Tag selected messages**.
5. In the **Add Tag** dialog box, do the following:

TAG NAME	ENTER A NEW UNIQUE TAG NAME.
Comments	Provide a comment or a description for the tag name.
Legal Hold	Select this check box if you want to apply the legal hold on the emails.
Select retention Tag	Instead of applying a new tag, you can apply the retention tags that are created in Arctera Insight Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply.
	After you select this option, the application disables the Tag Name field.

6. Click **Tag**.

After you apply tags to the emails, these tagged emails are available under the respective tags under the **Tags** node.

Applying legal hold to collaboration messages

To apply legal hold to the collaboration messages during case review

1. From the **eDiscovery**tab, select the**Cases** node to display the cases list in the main pane.
2. Select the required case from the cases list.

Under the **Cases**node in the left pane a***case_name*** node appears for the selected case.

1. Click the ***case_name***>**Research Sets**or**Review Sets**.
2. Select the required search under the Research Sets or the Review Sets node.

3. On the **Collaboration** tab, select the collaboration messages to which you want to apply legal hold.

   “ ”

   Note: Before you apply legal hold to the collaboration messages, you can view the previously applied tags, labels, and classification tags of the message in the preview pane. In the following sample image, you can see the previously applied tags, labels, and classification tags of the collaboration messages when you hover over the icons.

   “ ”

4. On the action menu, click **Message Legal Hold** , and do any of the following as required.

   - To apply legal hold to the selected message, click **Message Legal Hold**.
   - To remove previously applied legal hold, click **Remove Message Legal Hold**.

Applying and removing review status to collaboration message

Case reviewers can apply one of the following default review status to collaboration message to indicate its status in the eDiscovery review process:

- Not reviewed
- Escalate
- Irrelevant
- Privileged
- Redact
- Relevant

In addition, the eDiscovery Administrators can customize the available review status options.

To apply and remove review status to collaboration messages

1. Under the associated case, select **Review Set** , and open the corresponding review set node.
2. To apply a review status to one or more collaboration messages directly from the **Review Set** :

   - Select the check box for one or more collaboration messages in the list, and click **Review Status**.

- Then select the required review status.

To remove the applied review status, click the selected review status again.

1. To apply a review status to an collaboration message while you view its details:
   - Select the message from the **Review Set** list to display its details.

The review status is shown at the top of the preview pane that displays the details of the message.

- Select the required review status from the available options.

  > “ ”

  Note: To view collaboration messages based on their review status, you can filter the required review status node under theFiltersection.

  > “ ”

Exporting collaboration messages

To export collaboration messages

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to search collaboration messages.

The selected ***Case_Name*node appears belowCases**.

1. Click **New Search**to create a new search. Else, expand**Research Sets**or**Review Sets** to select existing search.

   > “ ”

   Note: You can access existing saved searches of the selected case from theReview SetandResearch Setnodes. Alternatively, you can clickNew Search, specify a new criteria in theAdvanced Searchor theQuery Searchoption to search for new collaboration messages for review. After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

> “ ”

2. In the right pane, on the **Collaboration** tab, select the messages you want to export.
3. Click **Export** , and do any of the following:
   - Click **Export selected messages** to export all the selected messages from the search.
   - Click **Export all messages** to export all the messages available search.
   - Click **Export by custodians** to export all the messages from the selected custodians.
4. If you are exporting all or selected messages, in the **Export Options** dialog box, do the following:

MESSAGE FORMAT	SELECT THE APPROPRIATE MESSAGE FORMAT FOR BATCH EXPORT. OPTIONS INCLUDE\:
	- JSON NOTE: THIS FORMAT IS SELECTED BY DEFAULT. WHEN YOU SELECT JSON FORMAT FOR EXPORT, FILES ARE DOWNLOADED IN THEIR ORIGINAL FORM, AND NOT AS JSON.
	- EDRM ONLY
Exclude Exported Messages	Select this option to exclude the exported messages.
Enable AES-256 Encryption	Select this check-box if you want to secure the access of the downloaded export batch.
Export Name	Provide the name for the batch you want to export. By default, it takes the Search Name. You can change it if required.
Export Password	Enter the password that you want end user to provide when they access this exported batch of messages.
Confirm Password	Repeat the same password for confirmation.
Generate Azure SAS URL	**Note:** Users can see this button only if theExport to Azure private storage

MESSAGE FORMAT	SELECT THE APPROPRIATE MESSAGE FORMAT FOR BATCH EXPORT. OPTIONS INCLUDE\:
	- JSON NOTE: THIS FORMAT IS SELECTED BY DEFAULT. WHEN YOU SELECT JSON FORMAT FOR EXPORT, FILES ARE DOWNLOADED IN THEIR ORIGINAL FORM, AND NOT AS JSON.
	- EDRM ONLY
	locationfeature in the Arctera Insight Management Console is enabled for them. Users can export items to their private Azure Blob storage location.
	Click Generate Azure SAS URL to get the Azure Blob SAS URL to access the location and save it for future use.
	For security reasons, the application does not show this URL the next time. However, if the SAS URL is misplaced for any reason, click Generate Azure SAS URL again to generate a new SAS URL and save it securely.
	After you click Export on the Export Options dialog box, all the selected items are exported to the Azure private storage location. You can use Microsoft Storage Explorer to access the exported items.
Share Export	Click Select Admin to choose the recipients of this batch export and click Update .
	Note: You need to manually share the Export Password with the administrators and follow all the security specific rules of the organization.

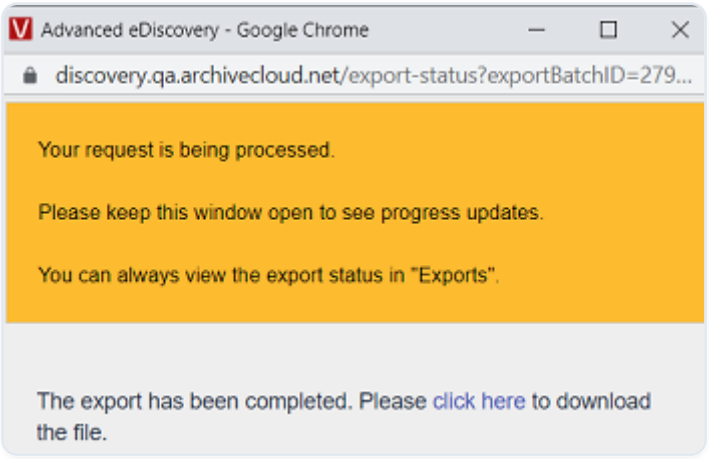
5. If you are exporting messages by custodians, in the **Add/Remove Custodians** dialog box, search for and select the custodians.

6. Click **Export**.

> “ ”

Note: The exported batch can either gets downloaded as a single or multiple file segments.

> “ ”



7. Click **Click here** to download the exported batch of messages.
8. To confirm the status of batch export, on the **eDiscovery**tab, under the selected case node, select**Exports** , and search this export batch name.

Exporting a search summary report for collaboration messages

To export a search summary report for messages during case review

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to search emails.
3. The selected ***Case_Name*node appears below Cases**.
4. Click **New Search**to create a new search. Else, expand**Research Sets**or**Review Sets** to select existing search.

You can access existing saved searches of the selected case from the **Review Set**and**Research Set**nodes. Alternatively, you can click**New Search** , specify a new criteria in the *Advanced Search*or the*Query Search* option to search for new emails for review.

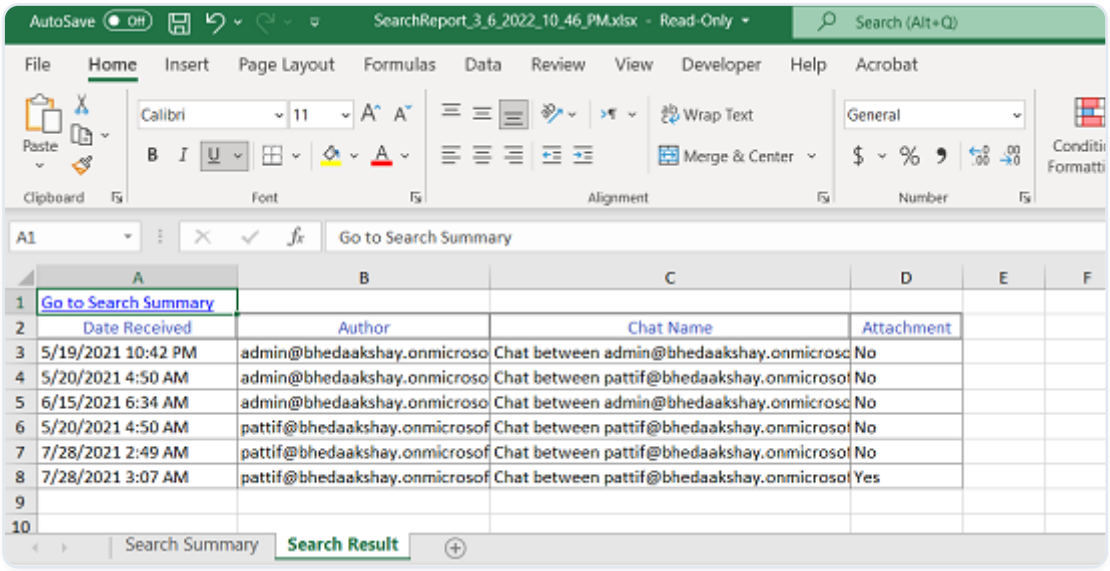
- If you select the search from **Research Sets**, the application do not show the**Review Status** option on the action bar.

- If you select a search from **Review Sets**, choose any filter option, and click**Apply**, the**Export Report** button remains disabled.

After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

1. On the **Collaboration**tab, click the Ellipsis icon (more actions) and click**Export Report**.

The application downloads the summary report (.xlsx) of the emails within search as a zipped (.zip) folder. A sample report is shown below. The report comprises of two sheets.



Note

- **Search Summary** : This sheet displays details such as *Search Parameters*and*Custodians*.
- **Search Result** : This sheet displays details such as *Date Received*,*Author*, Chat Names (list of people involved in chat), and*Attachments*.
- The **Chat Name** column displays the email addresses of message recipients involved in a chat. This column supports up to 100 characters; any text beyond this limit is truncated in the exported report.

Adding notes to collaborative messages

Reviewers can add notes to collaborative messages that are visible to other reviewers of that case. Notes are case-specific, therefore, a note that is applied to a collaborative messages in one case does not appear for the same collaborative messages in a different case. Notes can be provided to collaborative messages that are from the Review Sets only. You cannot provide notes to the collaborative messages that are from the Research Set.

To add a note to a collaborative message

1. From the **eDiscovery**tab, select the**Cases** node to display the cases list in the main pane.
2. Select the required case from the cases list.

Under the **Cases**node in the left pane a***case_name*** node appears for the selected case.

1. Click the ***case_name***>**Review Sets**.
2. Select the required search under the Research Sets or the Review Sets node.
3. On the **Collaboration** tab, select the collaboration message to view its content in the message preview pane.
4. Click the **More options**icon and select**Notes**.
5. In the **Add Notes** dialog box, specify the note about this message.
6. Click **Add** to save the note.

> “ ”

Note: Different reviewers can add and save their notes for the same message. The application displays all the notes applied to the message that can be used for a collaborative reviews.

> “ ”

Viewing audit history of collaboration messages

To view the audit history of a collaboration message

1. From the **eDiscovery**tab, select the**Cases** node to display the cases list in the main pane.
2. Select the required case from the cases list.

Under the **Cases**node in the left pane a***case_name*** node appears for the selected case.

1. Click the ***case_name***>**Research Sets**or**Review Sets**.
2. Select the required search under the Research Sets or the Review Sets node.
3. On the **Collaboration** tab, select the collaboration message to view its content in the message preview pane.
4. Click the **More options**icon and select**Audit**.

The application displays the audit history as shown in the following sample image.

1. If required, use the navigation icons to go to the next page, previous page, the first page, and the last page.

Printing MS Teams messages to PDF during eDiscovery

You can print collaboration messages collected from the *MS Teams*collectors using the Print to PDF feature. This feature is exclusive to*MS Teams* collaboration messages and is not supported for messages collected from other archive collectors.

Note: This feature is not available for *Production Sets* , as it is not applicable in that context.

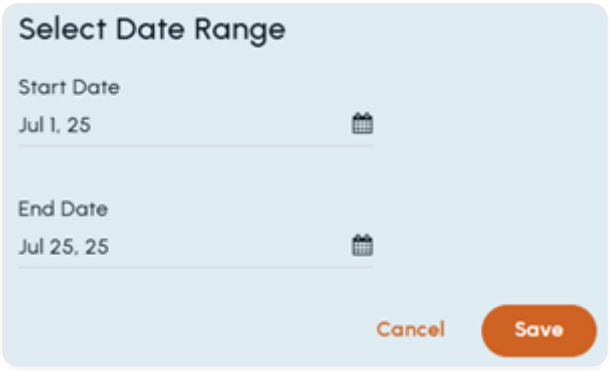
To print MS Teams messages to PDF during eDiscovery

1. From the **eDiscovery**tab, select the**Cases** node to display the cases list in the main pane.
2. Select the required case from the cases list.

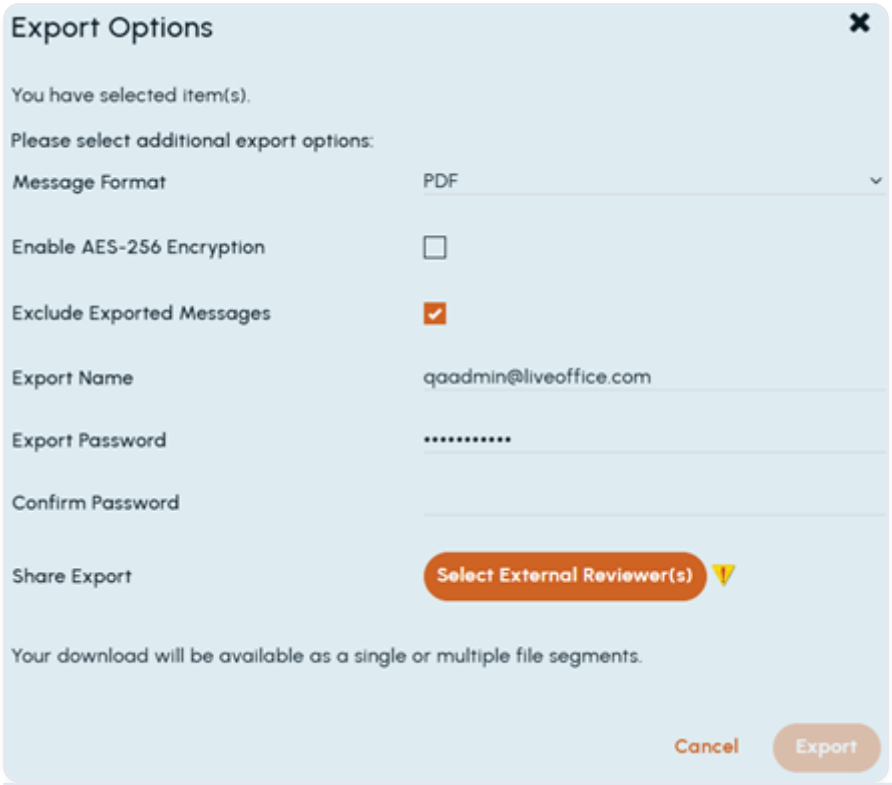
Under the **Cases**node in the left pane a***case_name*** node appears for the selected case.

1. Click the ***case_name***.
2. Access a required search result.
3. On the **Collaboration** tab, select the collaboration message.
4. Click the **More options**icon and select**Print To PDF**.

The application displays the **Select Date Range** as shown in the following sample image.



1. Specify the date range and click **Save**.
2. In the **Export Options** dialog box, specify the following details:



MESSAGE FORMAT	THE PDF FORMAT IS SELECTED BY DEFAULT.
Enable AES-256 Encryption	Select this check-box if you want to secure the access of the downloaded export batch.
Exclude Exported Messages	Select this option to exclude the exported messages.
Export Name	Provide the name for the batch you want to export. By default, it takes the Search Name. You can change it if required.

MESSAGE FORMAT	THE PDF FORMAT IS SELECTED BY DEFAULT.
Export Password	Enter the password that you want end user to provide when they access this exported batch of messages.
Confirm Password	Repeat the same password for confirmation.
Share Export	Click Select Admin(s) to choose the recipients of this batch export and click Update .
	Note: You need to manually share the Export Password with the administrators and follow all the security specific rules of the organization.

3. Click **Export**.

A browser appears showing the progress. Upon completion, Click the **Click here** link to download the PDF.

Reviewing files

The Files tab appears only if the OneDrive for Business service is enabled and the archive collector is configured for you. You can review all the files that are coming from the OneDrive for Business. While reviewing the messages, you can perform the following actions:

- Toggle between the original format and the plain text format of the file
- Applying tags
- Applying Legal hold
- Applying review status
- Exporting files
- Adding notes
- Viewing audit history
- Downloading messages

Accessing files for review

To access files for review

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to search files.
3. The selected ***Case_Name*node appears below Cases**.
4. Click **New Search**to create a new search. Else, expand**Research Sets**or**Review Sets** to select existing search.

You can access existing saved searches of the selected case from the **Review Set**and**Research Set**nodes. Alternatively, you can click**New Search** , specify a new criteria in the *Advanced Search*or the*Query Search* option to search for new files for review.

After performing a new search or accessing the existing searches from Review set and Research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

1. Click the **Files** tab to view the files for your review.
2. Select a file to view its details in the native view in the **Preview** pane.

   > “ ”

   Note: Insight eDiscovery does not support previewing certain file types, such as .dll and .exe and large files (over 30 MB to maintain browser responsiveness). For compressed files, Insight eDiscovery supports previewing only the .zip file format and does not support other formats like .7z, .tar, and so on. If you cannot preview a specific file type, simply download it and use the appropriate tools to view its content.

   > “ ”

3. Click **Native View**and**Text View** to toggle between the original file format and the plain text format respectively.

Applying tags to Files

To apply tags to the files during case review

1. From the **eDiscovery**tab, select the**Cases** node to display the cases list in the main pane.

2. Select the required case from the cases list.

Under the **Cases**node in the left pane a***case_name*** node appears for the selected case.

1. Click the ***case_name***>**Research Sets**or**Review Sets**.
2. Select the required search under the Research Sets or the Review Sets node.
3. On the **Files** tab, select the files to which you want to apply tags.

   > “ ”

   Note: Before you apply tags to the files, you can view the previously applied tags and classification tags of the files in the preview pane.

   > “ ”

4. On the action menu, click **Tag** , and do any of the following as required.
   - To tag all the files in the search, click **Tag all files**.
   - To tag only the selected files, click **Tag selected files**.
5. In the **Add Tag** dialog box, do the following:

TAG NAME	ENTER A NEW UNIQUE TAG NAME.
Comments	Provide a comment or a description for the tag name.
Legal Hold	Select this check box if you want to apply the legal hold on the files.
Select retention Tag	Instead of applying a new tag, you can apply the retention tags that are created in Arctera Insight Archiving. To access and apply those retention tags, select this option, and choose the tags you want to apply.
	After you select this option, the application disables the Tag Name field.

6. Click **Tag**.

After you apply tags to the files, these tagged files are available under the respective tags under the **Tags** node.

Applying or removing legal hold to files

To apply or remove legal hold to the files during case review

1. From the **eDiscovery**tab, select the**Cases** node to display the cases list in the main pane.
2. Select the required case from the cases list.

Under the **Cases**node in the left pane a***case_name*** node appears for the selected case.

1. Click the ***case_name***>**Research Sets**or**Review Sets**.
2. Select the required search under the Research Sets or the Review Sets node.
3. In the right pane, on the **Files** tab, select the files to which you want to apply legal hold.
4. On the action menu, click **File Legal Hold** , and do any of the following as required.
    - To apply legal hold to the selected files, click **File Legal Hold**.
    - To remove previously applied legal hold, click **Remove File Legal Hold**.

Applying and removing review status to files

Case reviewers can apply one of the following default review status to files to indicate its status in the eDiscovery review process:

- Not reviewed
- Escalate
- Irrelevant
- Privileged
- Redact
- Relevant

In addition, the eDiscovery Administrators can customize the available review status.

To apply and remove review status to a file

1. Under the associated case, select **Review Set** , and open the corresponding review set node.
2. To apply a review status to one or more files directly from the **Review Set** :

- Select the check box for one or more files in the list. In the preview pane, click **Review Status**.
- Then select the required review status.

To remove the applied review status, click the selected review status again.

1. To apply a review status to a file while you view its details:
   - Select the file from the **Review Set** list to display its details.

The review status are shown at the top of the preview pane that displays the details of the message.

- Select the required review status from the available options.

To remove the applied review status, click the selected review status again.

> “ ”

Note: To view collaboration messages based on their review status, you can filter the required review status node under theFiltersection.

> “ ”

Exporting files

To export files

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to search files.

The selected ***Case_Name*node appears below Cases**.

1. Click **New Search**to create a new search. Else, expand**Research Sets**or**Review Sets** to select existing search.

   > “ ”

   Note: You can access existing saved searches of the selected case from theReview SetandResearch Setnodes. Alternatively, you can clickNew Search, specify a new criteria in

theAdvanced Searchor theQuery Searchoption to search for new files for review. After performing a new search or accessing the existing searches from review set and research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

> “ ”

2. In the right pane, on the **Files** tab, select the files you want to export.
3. Click **Export** , and do any of the following:
   - Click **Export all files** to export all the files available search.
   - Click **Export selected files** to export all the selected files from the search.
   - Click **Export by custodians** to export all the files from the selected custodians.
4. If you are exporting all or selected files, in the **Export Options** dialog box, do the following:

MESSAGE FORMAT	SELECT THE APPROPRIATE MESSAGE FORMAT FOR BATCH EXPORT. OPTIONS INCLUDE\:
	- JSON NOTE: THIS FORMAT IS SELECTED BY DEFAULT. WHEN YOU SELECT JSON FORMAT FOR EXPORT, FILES ARE DOWNLOADED IN THEIR ORIGINAL FORM, AND NOT AS JSON.
	- EDRM ONLY
Exclude Exported Messages	Select this option to exclude the exported messages.
Enable AES-256 Encryption	Select this check-box if you want to secure the access of the downloaded export batch.
Export Name	Provide the name for the batch you want to export. By default, it takes the Search Name. You can change it if required.
Export Password	Enter the password that you want end user to provide when they access this exported batch of messages.

MESSAGE FORMAT	SELECT THE APPROPRIATE MESSAGE FORMAT FOR BATCH EXPORT. OPTIONS INCLUDE\:
	- JSON NOTE: THIS FORMAT IS SELECTED BY DEFAULT. WHEN YOU SELECT JSON FORMAT FOR EXPORT, FILES ARE DOWNLOADED IN THEIR ORIGINAL FORM, AND NOT AS JSON.
	- EDRM ONLY
Confirm Password	Repeat the same password for confirmation.
Generate Azure SAS URL	**Note:** Users can see this button only if theExport to Azure private storage locationfeature in the Arctera Insight Management Console is enabled for them. Users can export items to their private Azure Blob storage location.
	Click Generate Azure SAS URL to get the Azure Blob SAS URL to access the location and save it for future use.
	For security reasons, the application does not show this URL the next time. However, if the SAS URL is misplaced for any reason, click Generate Azure SAS URL again to generate a new SAS URL and save it securely.
	After you click Export on the Export Options dialog box, all the selected items are exported to the Azure private storage location. You can use Microsoft Storage Explorer to access the exported items.
Share Export	Click Select Admin to choose the recipients of this batch export and click Update .
	Note: You need to manually share the Export Password with the administrators and follow

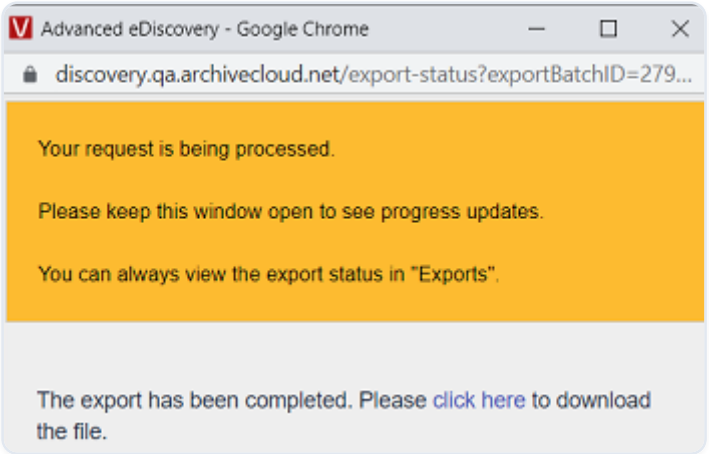
MESSAGE FORMAT	SELECT THE APPROPRIATE MESSAGE FORMAT FOR BATCH EXPORT. OPTIONS INCLUDE\:
	- JSON NOTE: THIS FORMAT IS SELECTED BY DEFAULT. WHEN YOU SELECT JSON FORMAT FOR EXPORT, FILES ARE DOWNLOADED IN THEIR ORIGINAL FORM, AND NOT AS JSON.
	- EDRM ONLY
	all the security specific rules of the organization.

5. If you are exporting files by custodians, in the **Add/Remove Custodians** dialog box, search for and select the custodians.
6. Click **Export**.

> “ ”

Note: The exported batch can either gets downloaded as a single or multiple file segments.

> “ ”



7. Click **Click here** to download the exported batch of files.
8. To confirm the status of batch export, on the **eDiscovery**tab, under the selected case node, select**Exports** , and search this export batch name.

Exporting a search summary report for files

To export a search summary report for files during case review

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to search emails.
3. The selected ***Case_Name*node appears below Cases**.
4. Expand **Research Sets**or**Review Sets** to select existing search.
5. Select the filter options and click **Apply**.
6. On the **Files**tab, and click**Export Report**.

> “ ”

Note: The following sample image is specific to a search inReview Sets. If you select the search fromResearch Sets, the application do not show theReview Statusoption on the action bar.

> “ ”

The application downloads the summary report (.xlsx) of the emails within the search as a zipped (.zip) folder.

> “ ”

Note: If you select a search fromReview Sets, and select any filter option and clickApply, theExport Reportoption is not displayed. TheExport Reportfunctionality is not available for the searches inNew Search.

> “ ”

Adding notes to files

Reviewers can add notes to files that are visible to other reviewers of that case. Notes are case-specific, therefore, a note that is applied to a files in one case does not appear for the same file in a another case. Notes can be provided to files that are from the Review Sets only. You cannot provide notes to the files that are from the Research Set.

To add a note to a file

1. From the **eDiscovery**tab, select the**Cases** node to display the cases list in the main pane.
2. Select the required case from the cases list.

Under the **Cases**node in the left pane a***case_name*** node appears for the selected case.

1. Click the ***case_name***>**Review Sets**.
2. Select the required search under the Review Sets node.
3. On the **Files** tab, select the file to view its content in the preview pane.
4. Click the **More options**icon and select**Notes**.
5. In the **Add Notes** dialog box, specify the note about this file.
6. Click **Add** to save the note.

Viewing audit history of files

To view the audit history of a file

1. From the **eDiscovery**tab, select the**Cases** node to display the cases list in the main pane.
2. Select the required case from the cases list.

Under the **Cases**node in the left pane a***case_name*** node appears for the selected case.

1. Click the ***case_name***>**Research Sets**or**Review Sets**.
2. On the **Files** tab, select the file to view its content in the preview pane.
3. Click the **More options**icon and select**Audit**.
4. The application displays the audit history as shown in the following sample image.
5. If required, use the navigation icons to go to the next page, previous page, the first page, and the last page.

Downloading files

To download a file

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to search files.
3. The selected ***Case_Name*node appears below Cases**.

4. Click **New Search**to create a new search. Else, expand**Research Sets**or**Review Sets** to select existing search.

You can access existing saved searches of the selected case from the **Review Set**and**Research Set**nodes. Alternatively, you can click**New Search** , specify a new criteria in the *Advanced Search*or the*Query Search* option to search for new files for review. After performing a new search or accessing the existing searches from Review set and Research sets, the application displays the filtered emails, collaboration messages, and files in the details pane.

1. Click the **Files** tab to view the files for your review.
2. Select the file to view its details in the **Preview** pane.
3. Click **Native View**and**Text View** to toggle between the original file format and the plain text format respectively.
4. Click the **Download** icon to save copy of a file on your local computer.

Annotating and redacting email and file content in native viewer

Annotations

Depending on your review requirements, you can add text and shape annotations to a document. For example, you can annotate the text or area with arrows, lines, boxes, stamps and then customize the line size, color, and fill color. You can also add comments for other users of the document. These annotations can be viewed and edited by other users for which you might need appropriate permissions. You can print and download such annotations for further use.

Redactions

Depending on your review requirements, you can draw dark rectangles to hide sensitive information within a document to avoid a confidentiality breach. You can determine the transparency level of such dark rectangles as required. When you print the document, you can permanently add these redactions over the content or entire page, and provide reasons for redactions. You can print and download such redactions for further use.

See About annotations and redactions.

Managing production sets

This section includes the following topics:

- About Production Sets
- Moving items to production sets
- Removing items from a production set
- Locking and unlocking production sets
- Configuring production set export options
- Exporting production sets

About Production Sets

The Production Set feature in Insight eDiscovery supports legally defensible Productions. Users can perform the following activities while managing the production sets:

- Creating production sets
- Adding items to new and existing production sets
- Removing the items from production sets
- Reviewing the items of the production sets
- Annotating and redacting the content and attachments
- Applying redaction reasons to the annotated and redacted content/area
- Locking the production sets
- Exporting Production Set documents with specified templates

In nutshell, the production sets assume that all reviewed, tagged, and relevant documents will be produced and shared for legal defense.

Moving items to production sets

You can move emails, collaboration messages, and files to the unlocked production sets only, and not to the locked production sets. You need to unlock the production sets before moving these items to the locked production sets.

To move items to production sets

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to search items.

The selected ***Case_Name*node appears below Cases**.

1. Click **New Search**to create a new search. To select existing saved searches, expand**Research Sets**or**Review Sets** and select a required search.
2. Perform advanced search or query search to get the expected items. See Performing Advanced Search and Query Search.
3. To move all the emails, collaboration messages, and files from the result, click **Move to Production Set**.
4. To move emails only, on the **Emails**tab, select the emails you want to include in the production set. Click**Production Set** , and do any of the following as required:
   - Click **Move all emails** to include all the emails available in the search.
   - Click **Move current page** to include all the emails displayed on the selected page.
   - Click **Move selected emails** to include all the selected emails from the search.
5. To move collaboration messages only, on the **Collaboration** tab, select the messages you want to include in the production set.

Click **Production Set** , and do any of the following:

- Click **Move all messages** to include all the collaboration messages available in the search.
- Click **Move selected messages** to include all the selected collaboration messages from the search.

1. To move files only, on the **Files** tab, select the files you want to include in the production set.

- Click **Move all files** to include all the files available in the search.
- Click **Move selected files** to include all the selected files from the search.

1. In the **Production Set** dialog box, do the following:

NEW PRODUCTION SET	SELECT THIS OPTION IF YOU WANT TO MOVE THE SELECTED EMAILS IN A NEW PRODUCTION SET. THIS OPTION IS SELECTED BY DEFAULT.
	IN THE PRODUCTION SET NAME FIELD, ENTER A UNIQUE NAME FOR THIS PRODUCTION SET.
	IN THE DESCRIPTION FIELD, ENTER A BRIEF DESCRIPTION OF THE PRODUCTION SET.
Existing Production Set	In the Production Set Name drop-down list, you can view only the unlocked production sets. You can not move emails to the locked production set.
	In the Production Set Name drop-down list, select a set to which you want to move (add) the selected emails.
	The description of the selected production set appears for your reference.

2. Click **Submit**.

If you have created a new production set, the application displays the *Production set created successfully* message. This newly created production set gets listed under **eDiscovery**tab >**Cases**> *Case_Name* >**Production Set**.

If you have moved the items to an existing production set, the application displays the *Production set updated successfully* message.

Removing items from a production set

You can remove items from the unlocked production sets only, and not from the locked production sets. You need to unlock the production sets before removing items from the locked production sets.

To remove items from a production set

1. On the **eDiscovery**tab, click**Cases**.

2. Search for and select the case from which you want to add or remove items.

The selected *Case_Name*node appears belowCases.

1. From the displayed case nodes, select **Production Sets**.

A list of available production sets of this case are displayed.

1. Select the unlocked production set from which you want to remove items.
2. Select items you want to remove, and click **Remove from Production Set**.

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

1. Click **Yes**.

The application displays the **Email(s) removed from Production Set successfully** message.

Locking and unlocking production sets

You can lock production sets to disable some of the features such as add or remove items, add or remove annotations and redactions, and update production export options. To perform all these actions, you must unlock these production sets.

To lock a production set

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to lock the production set before exporting it.

The selected *Case_Name*node appears belowCases.

1. From the displayed case nodes, select **Production Sets**.

A list of available production sets of this case are displayed.

1. Select the unlocked production set that you want to lock.
2. Click **Lock Production Set**.

The application displays the **Production Set Locked** message.

To unlock a production set

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to lock the production set before exporting it.

The selected *Case_Name*node appears belowCases.

1. From the displayed case nodes, select **Production Sets**.

A list of available production sets of this case are displayed.

1. Select the locked production set that you want to unlock.
2. Click **Unlock Production Set**.

The application displays the **Production Set Unlocked** message.

Configuring production set export options

You can specify the production set export options in the tabbed area at any time before running the production set export. This section also explains how can you create and apply the templates for productions sets.

To configure the export options before exporting the production set

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to configure a production set export options before exporting it.

The selected *Case_Name*node appears belowCases.

1. From the displayed case nodes, select **Production Sets**.

A list of available production sets of this case are displayed.

1. Select the production set for which you want to configure the export options before export.

The application displays the following configuration options:

- General
- Numbering
- Header/Footer
- Imaging
- Slip Sheet

1. Under **General** , specify the following:

LOAD FROM	FROM THE DROP-DOWN LIST, SELECT A PREVIOUSLY CREATED EXPORT TEMPLATE FORMAT.
	IF YOU SELECT THE PREVIOUSLY CREATED TEMPLATE, ALL THE PREVIOUSLY CONFIGURED FIELDS APPEAR AUTOMATICALLY.
Name	If you want to create a new setting, that can be later used as template, provide a name for the current setting. Till the time you do not create a template of this setting, this setting remains intact. When you open the production set, the application displays the lastly saved setting.
	If you save this setting as a template, this name is considered as a new template name, and this template name is listed under the Load from drop-down options.
Description	Provide a brief description for the current setting.
Production Type	Select this option to produce all documents as image files.

2. Under **Numbering** , specify the following values:

The following example shows the specified format.

The sample ITEM-0000012-001 shows the prefix ITEM-, numbering that includes 7 digits starting with the number 12, and a suffix of -001.

PREFIX	THE SETTINGS ON THIS TAB ASSOCIATE A PRODUCTION NUMBER WITH A CORRESPONDING DOCUMENT WHEN THE PRODUCTION IS RUN. SPECIFY THE DOCUMENT NUMBERING FOR THE PRODUCTION. IF REQUIRED, INCLUDE A DELIMITER AT THE END.
Minimum number of digits	Specify the minimum number of digits for numbering the documents. The number is padded with zeros, if needed to match the minimum.
Starting number	Specify the starting number for the numbered list of documents.
	Note: The product ensures that the same production number (combination of prefix and number) is not used multiple times on the same case. If the number you specify is below the minimum allowed number for that prefix, the next valid number is displayed.
Suffix	Specify a suffix for the numbered list with a delimiter, if required.

1. Under **Header/Footer** , specify the following:

HEADER	CHOOSE THE INFORMATION TO PRESENT FOR THE LEFT, CENTER, AND RIGHT HEADERS. SELECT FROM THE FOLLOWING ITEMS\:
	- NONE (NO ENTRY)
	- BATES NUMBER
	- AUTHOR
	- DATE PRODUCED
	- DOCUMENT ID
	- FREE TEXT
	- FILENAME
	- PAGE NUMBER
	- PAGE X OF Y
Footer	Choose the information to present for the left, center, and right headers. All the options are same as options in the header field.
Watermark	Type the word or words you want to appear as a watermark on the pages of the production.

2. Under **Imaging** , specify the following:

SLIP SHEET BY MAXIMUM LIMITS	ITEMS THAT EXCEED THESE MAXIMUM LIMITS PRODUCE A SLIP SHEET AND ARE NOT
	IMAGED.
	- PAGE COUNT : SPECIFY NUMBER OF PAGES AFTER WHICH A SLIP SHEET WILL BE PRODUCED.
	- FILE SIZE : SPECIFY MAXIMUM SIZE OF THE FILE (IN MB) AFTER WHICH A SLIP SHEET WILL BE PRODUCED.

3. Under **Slip Sheet** , specify the following:

CUSTOMIZABLE SLIP	THIS OPTION ALLOWS YOU TO CUSTOMIZE SLIP SHEETS WITH VARIOUS FIELDS WHICH CAN
SHEET TEXT	ASSIST IN IDENTIFYING EXCEPTIONS.
	EACH SLIP SHEET WILL RECEIVE A BATES NUMBER AND THE SPECIFIED TEXT WILL BE
	PRINTED IN THE CENTER OF THE SLIP SHEET (WHICH IS CREATED FOR ALL ITEMS THAT ARE
	NOT IMAGED). THE MAXIMUM LENGTH ALLOWED FOR THIS FIELD IS 1,024 CHARACTERS.
	- %DOCID : DOCUMENT ID.
	- %FILENAME : FILE NAME OF THE ITEM
	- %FILEEXTENSION : FILE EXTENSION OF THE ITEM
	- %BATESSTART : STARTING BATES NUMBER
	WHEN PRODUCED, A SLIP SHEET IS A PLACEHOLDER FOR ANY ITEM NOT RENDERED FOR
	ONE OF THE REASONS BELOW.
	- FULLY REDACTED - ITEM WAS REDACTED COMPLETELY
	- IMAGING ERROR - UNABLE TO CREATE IMAGE OF ITEM DURING PRODUCTION
	- CONVERSION ERROR - IMAGE FAILED TO CONVERT TO PDF
	- NATIVE PLACEHOLDER - BATES STAMPED NATIVE PLACEHOLDER
	YOU CAN APPLY YOUR CUSTOMIZED SLIP SHEET SETTINGS EITHER BY CHANGING THE
	TEXT WHILE CREATING THE PRODUCTION

4. Click **Save** , and do any of the following options as required.

    - If, under **General**, you have not selected the previously saved template in the**Load from** field, the application displays the confirmation message:

        - Click **Cancel** to save the settings without creating a new template. The application saves and displays this setting whenever you access the production set. You can modify this setting whenever required, and save it as a template for further use.
        - Click **Create New Template**to save the current setting as a new template. This template name is then displayed under the**Load from** field.

    - If, under **General**, you have selected the previously saved template in the**Load from** field, the application displays the confirmation message:

        - Click **Override** to update the selected template for the current settings
        - Click **Create New Template**to save the current setting as a new template. This template name is then displayed under the**Load from** field.

Exporting production sets

Insight eDiscovery allows you to efficiently export content in a variety of formats so that it can be presented to legal parties or ingested by other third party legal applications. Flexible export options make it easy to prepare, process and customize your documents and export options as a single production set.

The production set export is a system-generated file that contains several documents related to the case. You can add emails, collaboration messages, and files to a production set at any time until the production set is locked. After you lock the production set, to add new emails, collaboration messages, and files to this set, you need to first unlock the production set and then lock it again manually. When you click Export without locking the production set, the application automatically locks the production set to be exported.

> “ ”

Note: If the production set includes audio-video files and you intend to export it, these audio-video files cannot be exported in their original format. Only the AI transcripts of these files are exportable in PDF format. However, you can apply annotations and redactions to these PDF files for review purposes.

> “ ”

You can create individual production sets for emails, collaboration messages, and files. You can also export a collective production set that includes emails, collaboration messages, and files. After the export is successfully completed, you can download the exported zip file. The zip file consists of imaged files of the items, native files, metadata in the CSV format.

The metadata file in the exported zip file captures the details like Bates Number, Document Type, subjects, sender and receiver, attachments if any, and image/native/text file paths. For a collective production set, the sequence of the document type is emails first, then collaboration messages, and lastly files.

Exporting an individual production set for emails, collaboration messages, or files

To export an individual production set for emails, collaboration messages, or files

1. On the **eDiscovery** tab, select the case under which the production set is created.

Under the **Cases**node in the left pane, a***case_name*** node appears for the selected case. This node contains a number of sub-nodes that provide details of the case as follows. The available options depend on your permissions:

1. Expand **Production Sets** and select the set you want to export.

The emails, collaboration messages, and files are displayed under respective tabs.

1. Based on your requirement, select the **Emails**,**Collaboration**, or**Files** tab.

   > “ ”

   Note: On theFilestab, the application does not display a preview of file content if the file type of the selected file is not supported by the native viewer. In such scenarios, the application notifies that the PrizmDoc tool does not support the specific file type.

   > “ ”

2. Configure the production options before you export the production set. See Configuring production set export options.

3. Click **Export**.
4. In the **Production Set Export Options**dialog box, specify the following details, and click**Export**.

EXPORT NAME	BY DEFAULT, THIS FIELD DISPLAYS THE NAME OF THE SELECTED PRODUCTION SET. HOWEVER, YOU CAN CHANGE THIS NAME AND PROVIDE ANOTHER UNIQUE NAME.
	YOU CAN SEARCH THIS NAME UNDER EXPORTS > PRODUCTION SETS AFTER SUCCESSFUL EXPORT.
Export Password	Enter the strong password to protect the export file.
Confirm Password	Retype the same password for confirmation.
Image Format	Select this option to choose output format of the documents. You can publish the document in PDF and TIFF formats.
	The PDF option is selected by default.
TIFF Options	This field becomes enabled when you select the TIFF option in the Image Format field and provides the following options\:
	- Each file on a single page : If a document has multiple pages, a separate TIFF file will be generated for each page. For example, when exporting a production set, three TIFF files will be generated for a three-page email. In the image below, the pre00002suff.xlsx file has two pages. After selecting this option, while exporting the production set from the native folder to the image folder, the application generated two separate TIFF files for the two pages.
	- Each file on multiple pages : If a document has multiple pages, a single TIFF file will be generated for all pages. For example, when

EXPORT NAME	BY DEFAULT, THIS FIELD DISPLAYS THE NAME OF THE SELECTED PRODUCTION SET. HOWEVER, YOU CAN CHANGE THIS NAME AND PROVIDE ANOTHER UNIQUE NAME.
	YOU CAN SEARCH THIS NAME UNDER EXPORTS > PRODUCTION SETS AFTER SUCCESSFUL EXPORT.
	exporting a production set, only one TIFF file will be generated for a three-page email. In the image below, the pre00002suff.xlsx file has two pages. After selecting this option, while exporting the production set from the native folder to the image folder, the application generated a single TIFF file for the two pages.
Markup Type	Select this option to include redactions and annotations during export.
	Select the Redactions checkbox to include the redactions in the export document. You can export the redacted area as an Opaque or a Transparent area.
	Select the Annotations checkbox to include the annotations in the export document.
Include Extracted Text	Select this option to include the actual text of the documents in a text file. For redacted documents, only non-redacted text will be included in the extracted text.
Include EDRM Metadata File	Select this option to preserve and export the EDRM XML output file.
Include Natives	Select this option if you want to export all supported files in their native format.

5. Click **Export**.

6. To view the status of exported production set and download the zip file, in the left navigation, select **Exports**>**Production Sets**. After the export is completed, do the following:
    - Expand the production set row to view its details.
    - Click the **Download** icon to download the zip file that contains exported emails, collaboration messages, or files.

Exporting a collective production set for emails, collaboration messages, and files

To export a collective production set for emails, collaboration messages, and files

1. On the **eDiscovery** tab, select the case under which the production set is created.

Under the **Cases**node in the left pane, a***case_name*** node appears for the selected case. This node contains a number of sub-nodes that provide details of the case as follows. The available options depend on your permissions:

1. Expand **Production Sets** and select the set you want to export.

The emails, collaboration messages, and files are displayed under respective tabs.

1. Click **Export Production Set**.

The export file includes all emails, collaboration messages, and files in this production set.

1. Configure the production options before you export the production set. See Configuring production set export options.
2. Click **Export**.
3. In the **Production Set Export Options**dialog box, specify the following details, and click**Export**.

EXPORT NAME	BY DEFAULT, THIS FIELD DISPLAYS THE NAME OF THE SELECTED PRODUCTION SET. HOWEVER, YOU CAN CHANGE THIS NAME AND PROVIDE ANOTHER UNIQUE NAME.
	YOU CAN SEARCH THIS NAME UNDER EXPORTS > PRODUCTION SETS AFTER SUCCESSFUL EXPORT.
Export Password	Enter the strong password to protect the export file.
Confirm Password	Retype the same password for confirmation.
Image Format	Select this option to choose output format of the documents. For now, you can publish the document in PDF and TIFF formats.
Markup Type	Select this option to include redactions and annotations during export.
	Select the Redactions checkbox to include the redactions in the export document. You can export the redacted area as an Opaque or a Transparent area.
	Select the Annotations checkbox to include the annotations in the export document.
Include Extracted Text	Select this option to include the actual text of the documents in a text file. For redacted documents, only non-redacted text will be included in the extracted text.
Include EDRM Metadata File	Select this option to preserve and export the EDRM XML output file.
Include Natives	Select this option if you want to export all supported files in their native format.

4. Click **Export**.

5. To view the status of exported production set, in the left navigation, select **Exports**>**Production Sets**.

Annotating and redacting content in native viewer

This section includes the following topics:

- About annotations and redactions
- Native viewer capabilities
- Understanding the native viewer interface
- Annotating email and file content
- Redacting email and file content
- Printing the annotated and redacted document
- Downloading the annotated and redacted document

About annotations and redactions

Annotations

Depending on your review requirements, you can add text and shape annotations to a document. For example, you can annotate the text or area with arrows, lines, boxes, stamps and then customize the line size, color, and fill color. You can also add comments for other users of the document. These annotations can be viewed and edited by other users for which you might need appropriate permissions. You can print and download such annotations for further use.

Redactions

Depending on your review requirements, you can draw dark rectangles to hide sensitive information within a document to avoid a confidentiality breach. You can determine the transparency level of such dark rectangles as required. When you print the document, you can permanently add these redactions over the content or entire page, and provide reasons for redactions. You can print and download such redactions for further use.

Before you annotate or redact items, it is recommended to read the following sections.

More Information

Understanding the native viewer interface

Annotating email and file content

Redacting email and file content

Printing the annotated and redacted document

Downloading the annotated and redacted document

Native viewer capabilities

Arctera™ Insight eDiscovery uses Native Viewer that provides a powerful document viewing and document conversion functionality. Native Viewer includes an advanced HTML Viewer control which allows users to view, search, annotate, redact, print, and download documents right in their HTML5 browser. It does not require to install any custom software, such as Active-X.

Native view provides the ability to review 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 view that increases reviewer productivity.

Persistent Hit Highlighting highlights search terms in email and file content within the native viewer, allowing reviewers to simultaneously view highlighted search terms from the most recently performed searches.

Annotation and redaction functionalities enable reviewers to annotate and redact documents in multiple colors, apply reason codes, and verify redactions prior to production quickly and easily. Reviewers can redact specific text, pages, or areas within a document. Reviewers can leverage reason codes to quickly perform checks and verify the accuracy of all redactions.

Redaction verification enables reviewers to rapidly navigate through each redaction within a document as part of the quality control process. Reviewers can simultaneously redact all the searched terms in the document.

Understanding the native viewer interface

The native view provides various document viewing option.

- Action Tabs: You can use these tabs to view, search, annotate, and redact the content.
- Action Tools: When you select any action tab, the corresponding action tools are available for you.
- Display Tabs: You can use various document display options, such as text selection, pan tool, zoom in and out, and full screen mode.

- Print/Download: You can use these tools to print and download the document.
- Page Navigation: You can use these options to navigate across the document pages.

Annotating email and file content

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 Redaction.

Annotations are visible on produced documents. This means that emails and files can be annotated with any of the edit tools. After annotating, the item can be reviewed by another reviewer who can also add annotations.

You can consider using different colors and other formatting styles to differentiate reviewers.

To annotate email and file content

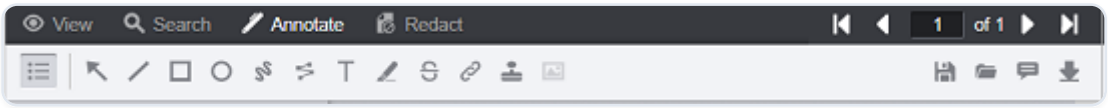
1. Select an email of a file, which you want to annotate, from your search result to view its content in the preview pane.
2. Click the **Native View** icon to view its content in a native viewer.
3. In the native viewer, to search a specific text or a phrase in the document, select the **Search**tab. In the search tool, enter the text or the phrase you want to search in the document, and click the**Search** icon.

   > “ ”

   Note: You can use the search tools such as Match exact word or phrase, Match case, Match whole word, Begins with, Ends with, Wildcard search, or Proximity search to make the search more precise.

   > “ ”

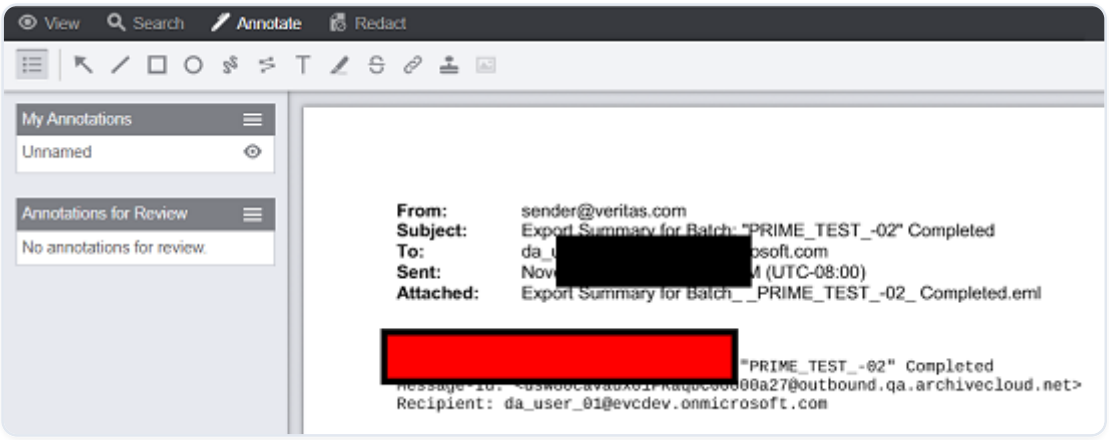
4. Select the text or area in the document and use the redaction tools as described below:



The following annotation tools are available:

- **Arrow** : Enables to draw an arrow. You can select color, opacity, and border width.
- **Line** : Enables to draw a line. You can select color, opacity, and border width.
- **Rectangle** : Enables to draw a rectangle. You can select fill color, opacity, border color, border width, and layer order.
- **Ellipse** : Enables to draw an ellipse. You can select fill color, opacity, border color, border width, and layer order.
- **Freehand** : Enables you to apply a freehand annotation. You can select color, opacity, and border width.
- **Polyline** : Enable to draw a custom polygon. You can select fill color, opacity, border width, and layer order.
- **Text** : Enable to write text within an annotation. You can select fill color, opacity, border color, border width, layer order, and several font options.
- **Highlight** : Enables to highlight the select text highlight annotation.
- **Strikethrough** : Enables to mark text that is mistaken or to be remove. You can select color and border width.
- **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.
- **Stamp** : User can give stamp of Approved, Rejected or Reviewed using this annotation. As of now, user can only apply one of these thee stamp annotations. Any other customized text is not possible.
- **Image Stamp** : You can apply any of the two pre-existing image stamps, cross or tick mark, on the document.

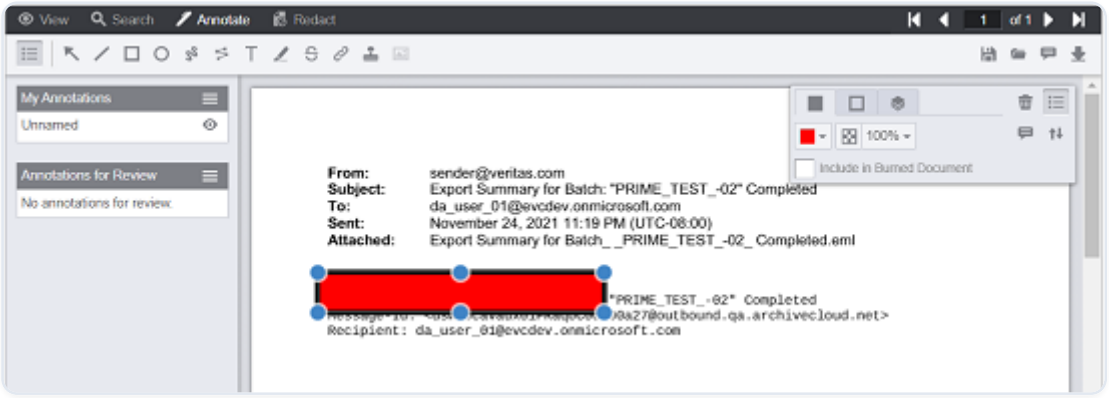
1. (Optional) Select the **Annotation Layers** icon to view the annotations layers in the left pane.



To create a layer, select the redacted text or area. Under **My Annotations**, click the**More Options** icon and do the following:

- Click **Edit Name** to name the selected redaction text or area.
- Select one or more annotations that you want to edit from the drop-down and another reviewer's annotations. Click **Load Annotations** to add these annotations under the selected annotation layer.
- Click **Save Annotations** to save the redaction text or area. A green notification bar displays that mentions the annotation and redaction are now saved in that layer.

1. Navigate to the text or area where you want to apply annotation
2. Select any of the annotation tools, and then draw the annotation.
3. Select the annotation to open the **Annotation Options** pane, and do the following as required. See the following sample image for annotation actions.



- Click the **Fill Color** icon to choose color of redacted area.
- Click the **Border Color** icon to set border color and width.
- Click the **Layer Order** icon to select the layer pattern.
- Select the transparency percentage for the annotation color.

- Select the **Include in burned document** check box to include this annotation when document is printed.
- Click the **Delete** icon to delete the redaction of selected area.
- Click the **Add Comment** icon to add a comment for selected area redaction.
- Click the **Move Menu**icon to shift the**Annotation Options** pane to top or bottom of the native view pane.

1. On the Action Tools bar, do the following as required:

- Click the **Save** icon to save the redacted text and areas.
- Select multiple annotations and click the **Load Annotations** icon to create a set of annotations within a document.
- Click the **Comments Panel** icon to view or hide the comments panel in the viewer.

1. If required, click the **Download** icon, and specify what to include during download in the document.

See Downloading the annotated and redacted document.

Redacting email and file content

In case of redacting emails in native view, attachments are linked to the original message (not the parent message with the attachment). The regular fields such as TO and CC are merged with the corresponding Journal fields.

You can redact these fields as well. In case of files, no such metadata is merged with the document. You can directly work on the document content.

To redact email and file content

1. Select an email of a file, which you want to redact, from your search result to view its content in the preview pane.
2. Click the **Native View** icon to view its content in a native viewer.
3. In the native viewer, do the following:

    - To search a specific text or a phrase in the document, select the **Search**tab. In the search tool, enter the text or the phrase you want to search in the document, and click the**Search** icon.

> “ ”

Note: You can use the search tools such as Match exact word or phrase, Match case, Match whole word, Begins with, Ends with, Wildcard search, or Proximity search to make the search more precise. While using the proximity search, the searched terms in the results are highlighted in the Preview pane and Native views of the attachments. The exact number of words between the search keywords or the order of the keywords does not matter.

> “ ”

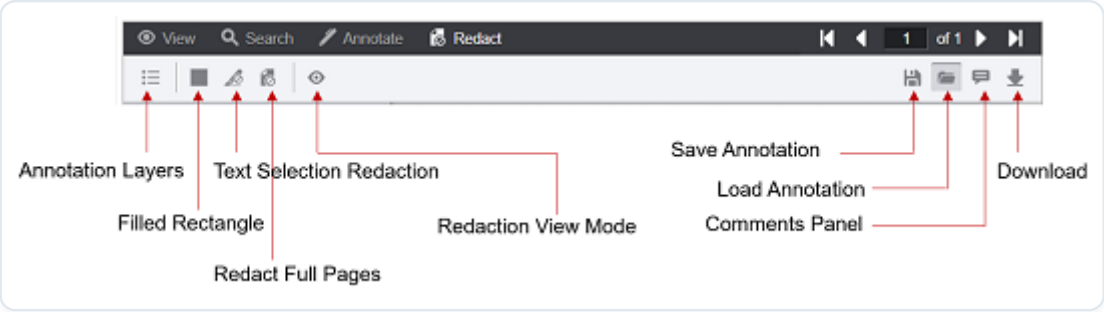
- To redact the area, select the **Redact** tab.

> “ ”

Note: You can use the redaction tools like rectangle selection, text selection, and full-page redaction to redact content.

> “ ”

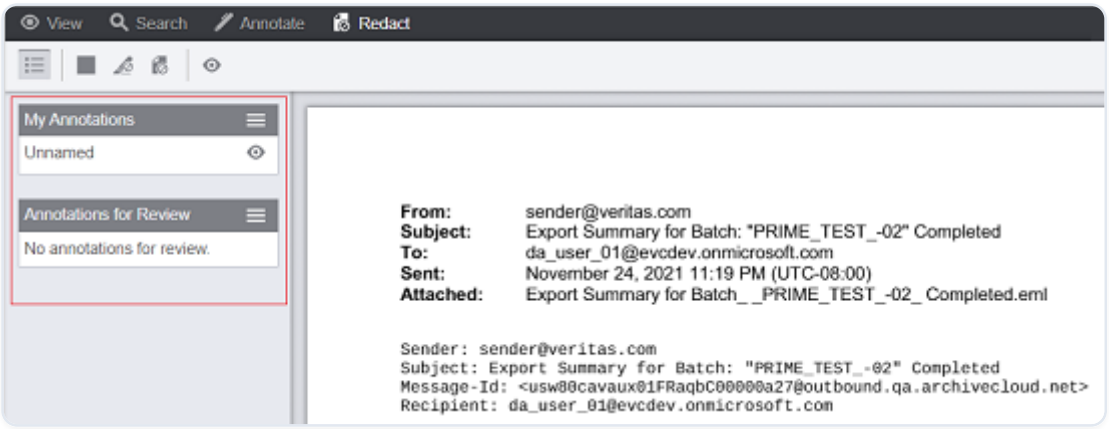
4. Select the text or area in the document and use the redaction tools as described below:



ANNOTATION LAYERS	THE ANNOTATION LAYER ICON IS LOCATED UNDER BOTH THE ANNOTATE AND THE REDACT TABS.
	THE ANNOTATION LAYER FUNCTIONALITY HELPS YOU TO CREATE, VIEW AND MANAGE MULTIPLE SETS OF ANNOTATIONS WITHIN A DOCUMENT AND IMPROVES COLLABORATION DURING DOCUMENT REVIEWING. THE NAME OF THE LAYER THAT A COMMENT BELONGS TO IS DISPLAYED NEXT TO THE DATE AND TIME IN THE COMMENT.
	BEFORE YOU SAVE OR LOAD THE ANNOTATIONS, ENSURE THAT YOUR SESSION IS NOT EXPIRED. ELSE, YOU CANNOT SAVE OR LOAD ANNOTATIONS IF THE SESSION IS EXPIRED.
Filled Rectangle	Redact area option enables you to create a redaction on any part of the viewable document. You can draw redaction boxes over any part of a document.
(Redact Area)	Click the Filled Rectangle 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.
Text Selection Redaction	Redact text option enables you to select text and apply redaction. Only black color is available for text redactions.
(Redact Text)	Select the text you want to redact, and click the Text Selection Redaction icon.

ANNOTATION LAYERS	**THE ANNOTATION LAYER ICON IS LOCATED UNDER BOTH THE ANNOTATE AND THE REDACT TABS.**
	THE ANNOTATION LAYER FUNCTIONALITY HELPS YOU TO CREATE, VIEW AND MANAGE MULTIPLE SETS OF ANNOTATIONS WITHIN A DOCUMENT AND IMPROVES COLLABORATION DURING DOCUMENT REVIEWING. THE NAME OF THE LAYER THAT A COMMENT BELONGS TO IS DISPLAYED NEXT TO THE DATE AND TIME IN THE COMMENT.
	BEFORE YOU SAVE OR LOAD THE ANNOTATIONS, ENSURE THAT YOUR SESSION IS NOT EXPIRED. ELSE, YOU CANNOT SAVE OR LOAD ANNOTATIONS IF THE SESSION IS EXPIRED.
Redact Full Pages	Redact page option enables you 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.
Redaction View Mode	Redaction View mode allows to make redacted area translucent or opaque. By default, the redacted area or text will be displayed in translucent mode.
	If you want the default redaction view mode to be opaque, please contact your case administrator.
	Click the Redaction View Mode icon to view or redact the text or area.

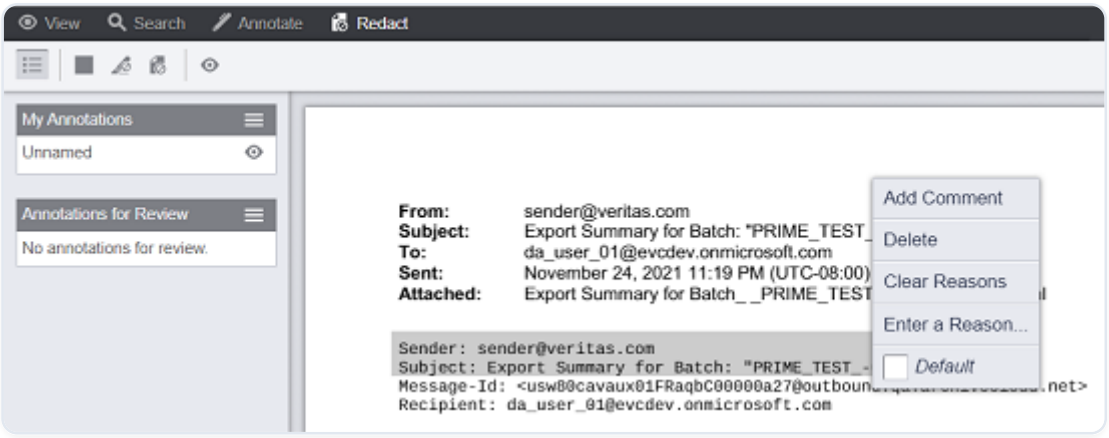
5. (Optional) Select the **Annotation Layers** icon to view the annotations layers in the left pane.



To create a layer, select the redacted text or area. Under **My Annotations**, click the**More Options** icon and do the following:

- Click **Edit Name** to name the selected redaction text or area.
- Select one or more annotations that you want to edit from the drop-down and another reviewer's annotations. Click **Load Annotations** to add these annotations under the selected annotation layer.
- Click **Save Annotations** to save the redaction text or area. A green notification bar displays that mentions the annotation and redaction are now saved in that layer.

1. Select the redacted text to open the **Annotation Options** pane, and do the following as required. See the following sample image for annotation actions.



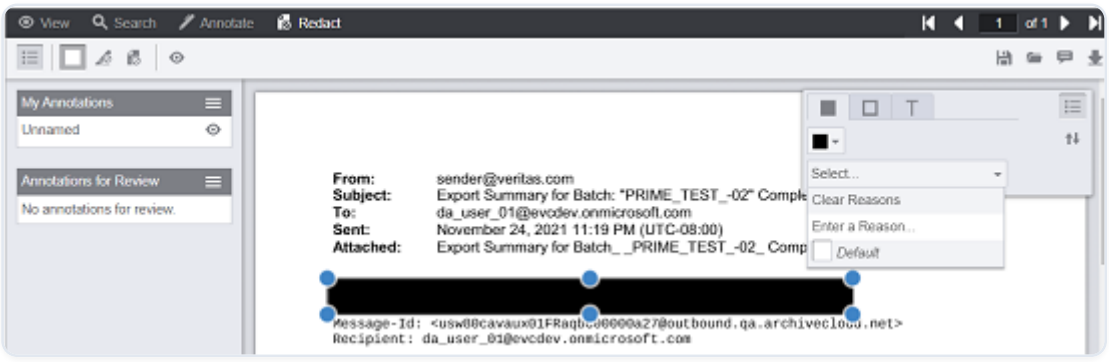
- Click the **Add Comment** icon to add a comment for selected text redaction.
- Click the **Delete** icon to delete the redaction of selected text.
- Select **Clear Reasons** to remove the previously implemented redaction reasons.
- Select **Enter Reasons** to provide a new reason for redaction. Select the predefined reasons, if available.

> “ ”

Note: After associating reasons, if you hover over the redacted area, a tooltip appears. The tooltip convention is as below: \<username of the user who applied the redaction reasons\> : \<applied redaction reasons separated by comma\> For example, if the user name is abc@xyz.com, and the applied reasons are RR1 and RR2, then the tooltip will appear asabc@xyz.com:RR1,RR2 If multiple users apply redaction reasons to the same redacted area, then the tooltip displays all users in stack. For example, another user pqr@xyz.com apply AB1 and AB2 redaction reasons to the above-mentioned redacted area, the tooltip appears as below: abc@xyz.com:RR1,RR2 pqr@xyz.com:AB1,AB2

> “ ”

1. Select the redacted area to open the **Annotation Options** pane, and do the following as required:



- Click the **Fill Color** icon to choose color of redacted area.
- In the drop-down list:
  - Select **Clear Reasons** to remove the previously implemented redaction reasons.
  - Select **Enter Reasons** to provide a new reason for redaction.
  - Select the predefined reasons, if available.
- Click the **Delete** icon to delete the redaction of selected area.
- Click the **Add Comment** icon to add a comment for selected area redaction.
- Click the **Move Menu**icon to shift the**Annotation Options** pane to top or bottom of the native view pane.

1. On the Action Tools bar, do the following as required:

- Click the **Save** icon to save the redacted text and areas.
- Select multiple annotations and click the **Load Annotations** icon to create a set of annotations within a document.
- Click the **Comments Panel** icon to view or hide the comments panel in the viewer.

1. If required, click the **Download** icon, and specify what to include during download in the document.

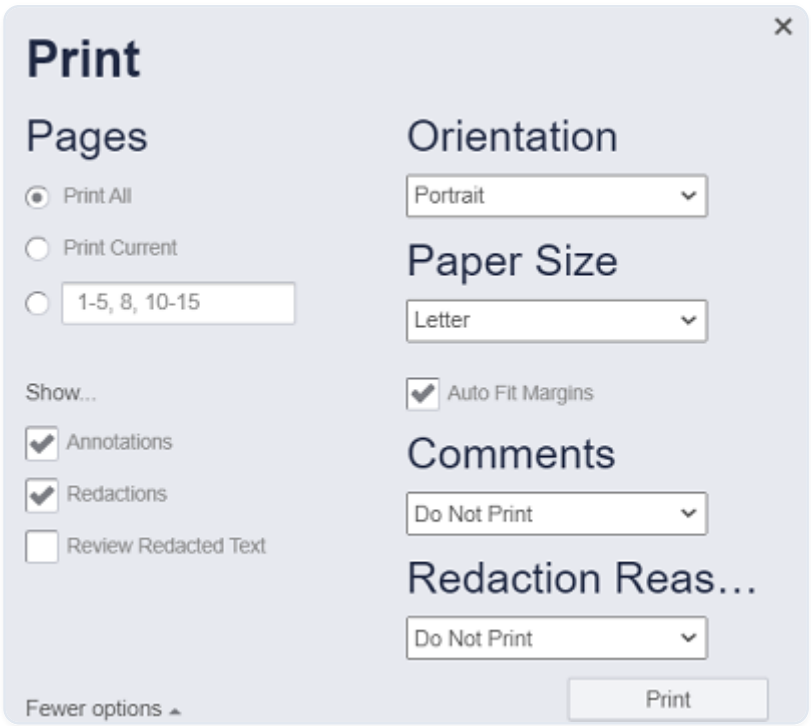
See Downloading the annotated and redacted document.

Printing the annotated and redacted document

After annotation or redaction, you can print the document with these redacted areas burned into the printed image thereby permanently hiding privileged or confidential information.

To print the annotated and redacted document

1. After you annotate or redact the content or document, select the **View** tab.
2. Click **Print**. The application displays the following dialog box.



3. Under **Pages** , select the options for the pages you want to print. Select the Annotation, Redaction, Review Redacted Text check-boxes if you want to print the document with all annotations, redactions, and review text.
4. Under **Orientation** , select the required page orientation.

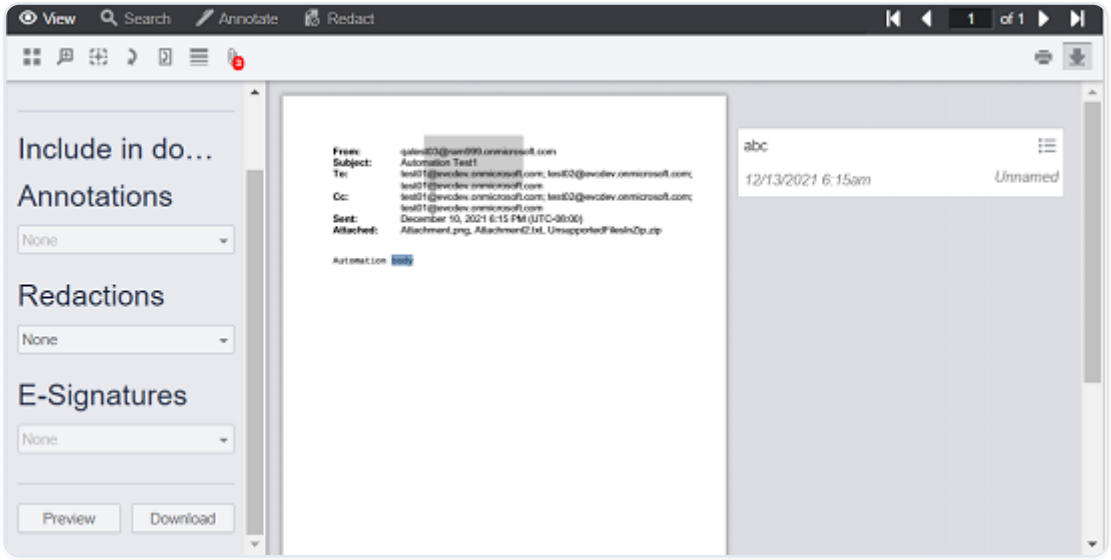
5. Under **Paper Size** , select the paper size for the printed document.
6. Under **Comments** , do the following:
    - Select **Do Not Print** to exclude printing of comments.
    - Select **After Each Page** to print comments after each page.
    - Select **At End of Document** to print all comments at the end of the printed document.
7. Under **Redaction Reasons** , do the following:
    - Select **Do Not Print** to exclude printing of redaction reasons.
    - Select **After Each Page** to print redaction reasons after each page.
    - Select **At End of Document** to print all redaction reasons at the end of the printed document.

Downloading the annotated and redacted document

After annotation or redaction, you can download document in either original format (native) or PDF format. You can choose to include or exclude annotations and redaction while downloading PDF.

To download the annotated and redacted document

1. After you annotate or redact the content or document, select the **View** tab.
2. Click **Download**. The application displays the following dialog box.



3. Under **Annotation**, select**None**to exclude annotation downloads or select**All** to include all annotations while document downloading.

4. Under **Redaction**, select**None**to exclude redaction downloads or select**All** to include all redactions while document downloading.
5. To preview the document before downloading it, click **Preview**. After preview, you can end preview by clicking the**End Preview** button.
6. Click **Download** to save the document on your computer.

Managing exports

This section includes the following topics:

- About exports
- Performing exports in Investigation and eDiscovery
- Viewing export details of native documents
- Viewing export details of production sets
- Resubmitting failed export items
- Option to maintain folder structure in the export
- Canceling Export Batch
- Email export FAQ

About exports

During investigation or a case review process, any user who has access to searches can do the following:

- Export the printable summary reports of a search for emails, collaboration messages, and files.
- Export actual emails, collaboration messages, and files.

It is important to understand the difference between exporting summary reports and exporting item records. When you export summary reports, the metadata displayed on the details pane is shown in the excel file. However, when you export items, the actual item files are downloaded.

- Download the exported items locally or to the private Azure Blob storage location.

Users can see this button only if the Export to Azure private storage location feature in the Arctera Insight Management Console is enabled for them.

While exporting items, in the Export Options dialog box, users can click Generate Azure SAS URL to get the Azure Blob SAS URL to access the location and save it for future use.

For security reasons, the application does not show this URL the next time. However, if the SAS URL is misplaced for any reason, click Generate Azure SAS URL again to generate a new SAS URL and save it securely.

After you click Export in the Export Options dialog box, all the selected items are exported to the Azure private storage location. You can use Microsoft Storage Explorer to access the exported items.

Performing exports in Investigation and eDiscovery

This section provides export-specific links to different sections. You can easily navigate to the export-specific sections of your interest.

- Investigation
  - Exporting items from searches
    - Batch export - Emails: See Exporting searched emails.
    - Summary report - Emails: See Exporting a search summary report for emails.
    - Batch export - Collaboration messages: See Exporting collaboration messages.
    - Summary report - Collaboration messages: See Exporting a search summary report for collaboration messages.
    - Batch export - Files: See Exporting searched files.
    - Summary report - Files: See Exporting a search summary report for files.
    - Summary report export: See Exporting a summary report of searched items.
  - Exporting items from Advance ECA searches
    - Batch export - Emails: See Exporting emails from Advanced ECA search.
    - Summary report export - Emails: See Exporting a search summary report for emails.
    - Batch export - Collaboration messages: See Exporting collaboration messages from Advanced ECA search.
    - Summary report export - Collaboration messages: See Exporting summary report for collaboration messages.
    - Batch export - Files: See Exporting files from Advanced ECA search.
    - Summary report export - Files: See Exporting summary report for files.
- eDiscovery
  - Batch export - Emails from cases: See Exporting emails.
  - Summary report - Emails from cases: See Exporting a search summary report for emails.

- Batch export - Collaboration messages from cases: See Exporting collaboration messages.
- Summary report - Collaboration messages from cases: See Exporting a search summary report for collaboration messages.
- Batch export - Files from cases: See Exporting files.
- Summary report - Files from cases: See Exporting a search summary report for files.

Viewing export details of native documents

The Export node lets you view the export-specific details of the native documents. The Native page provides a list of export batches. Insight eDiscovery splits large exports into 2-gigabyte batches. Therefore, multiple export batches can be associated with one export. You can expand the rows to view the export details and export download link. The details include information such as export file type, download size of the file, export start and completion dates, expiration date for download link, output file type, export status, and so on.

The page displays the Resubmit Failed Items section only when the selected export batch contains failed export items. Exports contain failed items when the *Completed with Errors*or*Error* is listed in the Step field.

To review export status of the native documents

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case.

The selected ***Case_Name*node appears below Cases**.

1. From the displayed case nodes, select **Exports**>**Native**.

The application displays a list of the native exports.

1. If required, click the **Refresh**icon in the top-right corner of the**Native** page to get the latest available records.

BATCH ID	ID NUMBER FOR THE EXPORT BATCH.
Export Name	Name of the export file.
Created By	Name of the user who has created the export.
Created Date	Date and time export was created.

BATCH ID	ID NUMBER FOR THE EXPORT BATCH.
Start Date	Date and time export started processing.
End Date	Date and time export process ended.
Step	Describes the export status\:
	- Complete - export without any errors
	- Completed with Errors - export with failed export items
	- Error - export failed
	- Terminated - export canceled
\# Total	Total number of export items.
\# Exported	Number of successful export items.
\# Failed	Number of failed export items.

2. Search for and select the export batch to view export details on native email exports.
    - When you expand an individual export batch (one without associated export batches), the **Export Details** section displays key information such as priority, export status, output file name, file size, created by, creation date, start and completion dates, file download expiry date, and more.
    - When you expand an export batch that contains associated export batches, the **Export Details** section displays a list of these associated batches. To view the details of each associated batch, you must expand them individually.
3. Download the export summary reports.
    - If it is an individual export batch (one without associated export batches), click the **Download** icon provided in the Download column of the item grid. The export summary of that individual batch will be downloaded for your review.
    - If it is an export batch that contains associated export batches, click the **Download** icon provided in the Download column of the item grid. A new browser window appears.

When you expand an export batch that contains associated export batches, the **Export Details** section displays a list of these associated batches. To view the details of each associated batch, you must expand them individually.

Click any of the following as needed:

- **Download All Batches** : Downloads all batches. Irrespective of the download status, all completed, failed, and unexported batches will begin downloading. The user will see a confirmation box to proceed or not, as the existing download status and download date columns will be reset to their default values.

To avoid performance issues and potential browser crashes, files will be downloaded in chunks of 10 batches at a time. Once the first chunk of 10 batches/files is downloaded, the next chunk will begin automatically.

- **Download selected Batches** : Select one or multiple batches to download exported results.
- **Pause/Resume**: Pause puts ongoing downloads on hold till you click**Resume**. Upon resuming, the paused batches' start downloading. Resume works for remaining batches if the window is reopened.
- **Cancel** : Stops ongoing downloads, saves status, and shows it upon reopening.

The downloaded zip file is password protected. Enter the appropriate password to view the report.

Viewing export details of production sets

The Export node lets you view the export-specific details of the production sets.

To view export details of the production set

1. On the **eDiscovery**tab, click**Cases**.
2. Search for and select the case in which you want to configure a production set metadata before exporting it.

The selected ***Case_Name*node appears below Cases**.

1. From the displayed case nodes, select **Exports**>**Production Sets**.

The application displays a list of the production set export batches.

1. If required, click the **Refresh**icon in the top-right corner of the**Production Sets** page to get the latest available records.

BATCH ID	ID NUMBER FOR THE EXPORT BATCH.
Export Name	Name of the export file.
Created By	Name of the user who has created the export.
Created Date	Date and time export was created.
Start Date	Date and time export started processing.
End Date	Date and time export process ended.
Step	Describes the export status\:
	- Complete - export without any errors
	- Completed with Errors - export with failed export items
	- Error - export failed
	- Terminated - export canceled
\# Total	Total number of export items.
\# Exported	Number of successful export items.
\# Failed	Number of failed export items.

2. Search for and select the export batch to view export details on production exports.
    - When you expand an individual export batch (one without associated export batches), the **Export Details** section displays key information such as priority, export status, output file name, file size, created by, creation date, start and completion dates, file download expiry date, and more.
    - When you expand an export batch that contains associated export batches, the **Export Details** section displays a list of these associated batches. To view the details of each associated batch, you must expand them individually.
3. Download the export summary reports.

- If it is an individual export batch (one without associated export batches), click the **Download** icon provided in the Download column of the item grid. The export summary of that individual batch will be downloaded for your review.
- If it is an export batch that contains associated export batches, click the **Download** icon provided in the Download column of the item grid. A new browser window appears.

  > “ ”

  Note: When you expand an export batch that contains associated export batches, theExport Detailssection displays a list of these associated batches. To view the details of each associated batch, you must expand them individually.

  > “ ”

Click any of the following as needed:

- **Download All Batches** : Downloads all batches. Irrespective of the download status, all completed, failed, and unexported batches will begin downloading. The user will see a confirmation box to proceed or not, as the existing download status and download date columns will be reset to their default values.

To avoid performance issues and potential browser crashes, files will be downloaded in chunks of 10 batches at a time. Once the first chunk of 10 batches/files is downloaded, the next chunk will begin automatically.

- **Download selected Batches** : Select one or multiple batches to download exported results.
- **Pause/Resume**: Pause puts ongoing downloads on hold till you click**Resume**. Upon resuming, the paused batches' start downloading. Resume works for remaining batches if the window is reopened.
- **Cancel** : Stops ongoing downloads, saves status, and shows it upon reopening.

The downloaded zip file is password protected. Enter the appropriate password to view the report.

Resubmitting failed export items

Exports contain failed items when Completed with Errors or Error is listed in the Step field.

Exports with failed items can be resubmitted three times.

> “ ”

Note: Exports can only be resubmitted after all associated export batches have finished processing. Insight eDiscovery splits large exports into 2-gigabyte batches. Therefore, multiple export batches can be associated with one export.

> “ ”

For more information on failed items, see the error list in the download file.

To resubmit failed export items:

1. On the **Investigation**tab, in the left navigation pane, select**Exports**.

Or, on the **eDiscovery**tab, select the case, and then in the left navigation pane, select**Exports**.

1. Select the failed export batch you want to resubmit.
2. In the Resubmit Failed Items section, click **Go**.

> “ ”

Note: TheResubmit Failed Itemssection appears only when the selected batch contains failed export items. The batch contains failed items whenCompleted with ErrorsorErroris listed in theStepfield.

> “ ”

3. Complete the information in the Resubmit Fail Items window. Review the following table for more information.

EXPORT NAME	ENTER A NAME FOR THE EXPORT FILE.
	NOTE: THE MINIMUM LENGTH IS 5 CHARACTERS AND THE MAXIMUM IS 160.
Export Password	Enter an access password for the export file. The password is required to open the export file after it is downloaded to your computer.

EXPORT NAME	ENTER A NAME FOR THE EXPORT FILE.
	NOTE: THE MINIMUM LENGTH IS 5 CHARACTERS AND THE MAXIMUM IS 160.
Confirm Password	Enter your export password again to confirm.

4. Click **Export Items**.

> “ ”

Note: Only failed items are included in the resubmitted exports. For example, if an export with 20 items includes 5 failed items, only the 5 failed items are exported to the file.

> “ ”

Option to maintain folder structure in the export

The option to Include Folder structure in the export is displayed to the Customer only when all the listed conditions are satisfied:

- Customer has purchased Folder Synchronization
- Customer exports a single custodian's email
- Customer is on the E Discovery Tab

The Include Folder Structure check box is displayed and disabled by default. The check box is enabled for selection only when the user selects the value PST from the Message Format drop-down.

Canceling Export Batch

When you cancel an export batch, the export is abandoned, and the status of the batch is set to Terminated. The option to resubmit failed items is disabled on the terminated batch.

To cancel an export batch

1. On the **Investigation**tab, in the left navigation pane, click**Exports**.

The batch export records appears.

1. Search for and select an export batch in the table of exports.
2. Click the corresponding arrow icon adjacent to the **Batch ID** column to expand and view the export batch details.
3. To download a zip file of the export batch, click **Download**.
4. To cancel the export, click **Cancel Batch** before the export is completed.

Email export FAQ

The following frequently asked questions provide more information about data exports in Insight eDiscovery.

- What is the maximum number of messages that I can export?

You can export up to 200,000 messages.

- Why is the export to NSF option unavailable?

The NSF export option is only available when a Domino server has been configured as the mail server type in the archive settings. Contact your Archive Administrator for more information.

Collaborative reports

This section includes the following topics:

- About collaborative eDiscovery reporting
- Report by email: Audit trail
- Report by Case: Case History
- Report by Case: Case Summary
- Report by Archive: eDiscovery dashboard

About collaborative eDiscovery reporting

The eDiscovery Administrators and reviewers with the appropriate permissions can review the reports that contain case-related actions. They can review reports by email, by case, or by archive.

Collaborative eDiscovery reports contain the following information:

- Created Case
- Created Search
- Search criteria used
- The number of emails that are assigned to a specific reviewer

Report by email: Audit trail

Reviewers can review the audit trail for a specific email that includes actions performed, such as review status tags or the applied labels and export details.

To review the audit trail for an email

1. Expand the node for a case.
2. Expand the Review Status Tags node.
3. Select **All** to display all emails or one of the review status tags under the Review Status Tags node.
4. Select the email you want to audit.
5. Click **Audit**.

6. Review the information in the Email History window that displays.

Report by Case: Case History

Reviewers can see and search all actions which are performed within a case such as edits on case details, reviewer permission changes, or created exports.

> “ ”

Note: Only the eDiscovery Administrators or reviewers with theView Case Logs/Reportspermission can view reports for a case.

> “ ”

To review the history for a case

1. Expand the node for a case.
2. Select **Case History** from the node for the case you selected. The Case History pane displays.
3. Click the arrow to display the Case History search menu.
4. Use the filters that are provided to search for specific Case History items. Review the following table for more information.

SCOPE	SELECT THE GENERAL SCOPE OF THE CASE HISTORY ITEM.
Action	Select the specific action of the Case History item.
User	Select the user that performed the action.
Date From	Enter the start date for the search range.
Date To	Enter the end date for the search range.
Before Value	Enter the before state of an item.
	You can enter the original review status tag for an email.

SCOPE	SELECT THE GENERAL SCOPE OF THE CASE HISTORY ITEM.
After Value	Enter the after state of an item.
	You can enter the final review status tag for an email.

5. Click **Search**.
6. Click **Export Report** to export the report for review at a later time.
7. Review the information in the Email History window that displays.

Report by Case: Case Summary

The eDiscovery Administrators and reviewers can view a report for individual cases, which includes the number of reviewers, custodians, emails, and legal holds. The case expiration date is also displayed.

To review the summary for a case

1. Expand the node for a case.
2. Select **Summary** from the node for the case you selected.
3. Review the Case Summary report that displays.
4. Click **Export Report** to export the report for review at a later time.

Report by Archive: eDiscovery dashboard

The eDiscovery Administrators can view a report for the entire archive. This report includes the number of emails within each case and the number of cases that are assigned to a reviewer.

To review the summary for the archive

1. On the eDiscovery tab, click Dashboard node.
2. Review the information.
3. If required, click **Export Report** to export the report for review whenever required.

Insight eDiscovery alerts

This section includes the following topics:

- Creating an alert

Creating an alert

Administrators and reviewers can create an alert that sends an email notification each time a user sends or receives an email that meets flagged criteria. For example, Administrators and Reviewers can create alerts to flag emails with profanity in the subject line, message body, or attachment.

To create an alert

1. Create a saved search that defines the criteria for the alert.
2. Select the Alerts option on the Profile icon in the top-right corner of the application page.
3. Click the plus icon to display the Add Policy Alert page.
4. Enter the information for the alert in the Add Policy Alert window.

Refer to the following table for more information:

POLICY NAME	ENTER A NAME FOR THE NEW ALERT.
Saved Search	Click the down arrow and select the required saved search.
Alert Email(s)	Enter your email address.
Comment	Enter comments relating to the alert.
In Dashboard	Select the check box if you want the alert to appear in the Administration dashboard .

Email Continuity

This section includes the following topics:

- Managing Email Continuity
- Viewing Continuity emails

Managing Email Continuity

The Continuity tab is available to your organization if it subscribes to the Email Continuity feature.

If your account has the required permissions, you can access the Continuity Management page to do the following:

- Control whether users can send, reply to, and forward emails from Insight Personal Archive when your mail server is unavailable.
- Control whether users receive a notification when your organization's mail server is unavailable and Email Continuity is active.
- View the list of domains and mail servers that are configured for Email Continuity, and the Email Continuity status in each case.

To manage Email Continuity

1. Select the Continuity tab.
2. Select the Continuity Management node.
3. Review or configure the Email Continuity settings as required. The configurable settings are as follows:

ENABLE SEND, REPLY AND FORWARD	SELECT TO ALLOW USERS TO SEND, REPLY, AND FORWARD EMAILS FROM INSIGHT PERSONAL ARCHIVE WHEN YOUR ORGANIZATION'S MAIL SERVER IS UNAVAILABLE.
Indicate EC Active	Select to notify users when your organization's mail server is unavailable and Email Continuity is active.

The table below the settings lists each domain and corresponding mail server that are configured for Email Continuity, and the Email Continuity status in each case.

1. Click **Save** to save any changes you made.

Viewing Continuity emails

From the Continuity Emails page of the Continuity tab, administrators can view a list of the emails that Email Continuity has handled during an outage.

To view continuity emails

1. Select the Continuity tab.
2. Select the Continuity Emails node.

Methods for searching cases and accounts

This section includes the following topics:

- Performing Advanced Search and Query Search
- Search syntax for Advanced Search
- About stop words and special characters
- About Hit-highlighting and navigating to searched terms
- Phrase searches
- Boolean operator searches
- Wildcard searches
- Proximity searches
- Double-byte character set searches
- About enhanced searches in Japanese
- Searchable attachment types
- Search examples and tips

Performing Advanced Search and Query Search

Insight eDiscovery provides the Advanced Search and the Query Search features to search the content within archived accounts and cases. Both the search features are available in the Investigations tab (where you can search your own account or the accounts that you manage) and the eDiscovery tab (where you perform searches of the custodian accounts within cases).

Advanced Search support the use of phrase search, Boolean operators, proximity search, and wildcard search. See Search syntax for Advanced Search.

Performing an advanced search

To perform an advanced search

1. Access the **Advanced Search**tab from the**Investigation**or the**eDiscovery** tab.
2. Specify the following inputs:

CUSTODIANS	**- SELECT ALL TO SEARCH ARCHIVES OF ALL OF THE CUSTODIANS THAT ARE ASSOCIATED WITH THE CASE.**
	- SELECT CUSTOM TO SEARCH ARCHIVES OF THE PARTICULAR CUSTODIANS. THE MANAGE BUTTON APPEARS. CLICK MANAGE TO OPEN THE ADD/REMOVE CUSTODIANS . EXPAND SELECTED CUSTODIANS TO VIEW THE CUSTODIANS SELECTED FOR THIS SEARCH. EXPAND MANAGE CUSTODIANS AND SELECT THE CUSTODIANS REQUIRED FOR THIS SEARCH. CLICK UPDATE TO ADD THESE SELECTED CUSTODIANS AS A SEARCH INPUT. THESE CUSTODIANS ARE LISTED UNDER THE SELECTED CUSTODIANS SECTION.
Custom Headers	**Note:** TheCustom Headersoption does not appear if there is no entry for a custom header for a particular group or tenant in database. Custom header does not work independently. You need to use the filter criteria to search the required items.
	Expand Custom Headers and set the header operator values.
	- Click + to add new search clauses.
	- Click - to remove search clauses that are not required.
	- In the first column, select the required header you want to search for. Based on the data type you have selected, the operator changes. For example, if you have selected the receiver date in header, the operator values can be Between , Before inclusive and After inclusive . For a numeric or integer header value, the operator values can be Is equal to , Less than , and Greater than . If

CUSTODIANS	**- SELECT ALL TO SEARCH ARCHIVES OF ALL OF THE CUSTODIANS THAT ARE ASSOCIATED WITH THE CASE.**
	- SELECT CUSTOM TO SEARCH ARCHIVES OF THE PARTICULAR CUSTODIANS. THE MANAGE BUTTON APPEARS. CLICK MANAGE TO OPEN THE ADD/REMOVE CUSTODIANS . EXPAND SELECTED CUSTODIANS TO VIEW THE CUSTODIANS SELECTED FOR THIS SEARCH. EXPAND MANAGE CUSTODIANS AND SELECT THE CUSTODIANS REQUIRED FOR THIS SEARCH. CLICK UPDATE TO ADD THESE SELECTED CUSTODIANS AS A SEARCH INPUT. THESE CUSTODIANS ARE LISTED UNDER THE SELECTED CUSTODIANS SECTION.
	you have selected a string value in header, then the operator will be Contains .
	- In the second column, select the available operator.
	- In the third column, specify the text, phrase, or date that you want to search for.
Filters	Expand Filters and set the filter operator values. The operators are explained in a table below.
	- Select All to match all conditions you have provided.
	- Select Any to match any of the conditions you have provided.
	- Click + to add new search clauses, and complete a new row for each clause.
	- Click - to remove search clauses that are not required.

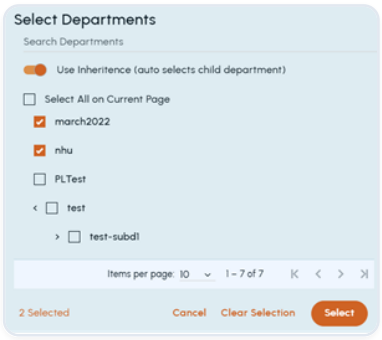
CUSTODIANS	**- SELECT ALL TO SEARCH ARCHIVES OF ALL OF THE CUSTODIANS THAT ARE ASSOCIATED WITH THE CASE.**
	- SELECT CUSTOM TO SEARCH ARCHIVES OF THE PARTICULAR CUSTODIANS. THE MANAGE BUTTON APPEARS. CLICK MANAGE TO OPEN THE ADD/REMOVE CUSTODIANS . EXPAND SELECTED CUSTODIANS TO VIEW THE CUSTODIANS SELECTED FOR THIS SEARCH. EXPAND MANAGE CUSTODIANS AND SELECT THE CUSTODIANS REQUIRED FOR THIS SEARCH. CLICK UPDATE TO ADD THESE SELECTED CUSTODIANS AS A SEARCH INPUT. THESE CUSTODIANS ARE LISTED UNDER THE SELECTED CUSTODIANS SECTION.
	- Searches are not case-sensitive. The search supports phrase search, Boolean operators, proximity search, and wildcard search. See Search syntax for Advanced Search .

The **Filter** operators are listed below:

MESSAGE	ENTIRE MESSAGE	CONTAINS / DOESN'T CONTAIN
Subject + Body	Contains / Doesn't Contain	-
Subject	Contains / Doesn't Contain	-
Body	Contains / Doesn't Contain	-
Inbound Message (AND)	Yes / No	-
Outbound Message (AND)	Yes / No	-
Internal Message (AND)	Yes / No	-
	Note: In Advanced Search , this option filters and retrieves only internal	

MESSAGE	ENTIRE MESSAGE	CONTAINS / DOESN'T CONTAIN
	messages exchanged within the same organization.	
Is Hidden	Yes / No	-
IP Header	Contains / Doesn't Contain	-
Date Sent/Modified(AND)	Is Equal To	Select a date
Date Sent/Modified(AND)	Before	Select a date
Date Sent/Modified(AND)	After	Select a date
Date Sent/Modified(AND)	Within Range	Select a date range
Participants	All Senders and Recipients	Contains / Doesn't Contain
Participants	Senders Only	Contains / Doesn't Contain
Participants	Recipients Only	Contains / Doesn't Contain
Participants	To/Cc	Contains / Doesn't Contain
Participants	To	Contains / Doesn't Contain
Participants	Bcc	Contains / Doesn't Contain
Classification	Classified As	Contains / Doesn't Contain
Note: This option is available if the Arctera Insight Classification service is enabled for a user.		Select a classification tag from the drop-down list. The list shows all the classification tags that have been applied to your company's messages in Arctera Insight Archiving.
		To see a tooltip with a classification tag's description, select the classification tag from the

MESSAGE	ENTIRE MESSAGE	CONTAINS / DOESN'T CONTAIN
		drop-down list and then point to the classification tag.
Classification	Sentiment Score	Is Equal To / Below (Inc.) / Above (Inc.)
Note: This option is available if the Arctera Insight Classification service is enabled for a user.		
Attachment	Has Attachment	Yes / No
Attachment	File/Attachment Name	Contains / Doesn't Contain
Attachment	File Attachment Type	Contains / Doesn't Contain
		See Searchable attachment types .
Archive Date	Is Equal To : Finds items archived on a specific date.	Select date.
Filter archived data based on the date when emails, collaboration items, or files were archived.	Before : Finds items archived before a certain date.	**Note:** Use this filter only for the data archived after January 2021. Data before January 2021 will not appear in filtered results.
	After : Finds items archived after a certain date.	Tip : If you want to use Query Search instead of Advanced Search, use the ArchiveDate: term and then build the search criteria.
	Within Range : Finds items archived between two chosen dates.	
Source Type	Is : Filters results that match the selected source type(s)	Select one or more sources as needed.

MESSAGE	ENTIRE MESSAGE	CONTAINS / DOESN'T CONTAIN
	Is Not : Excludes results that match the selected source type(s).	
Department	All Senders & Recipients : Filters data where both the sender and recipient belong to the selected department(s).	 Select Any or All operator and then click Select Department .
Note: This option is available if the Arctera Insight Surveillance service is enabled for a user.	Senders Only : Filters data where only the sender belongs to the selected department(s).	A dialog box opens where you can choose one or more departments to apply as a filter.
	Recipients Only : Filters data where only the recipient belongs to the selected department(s).	1. Use the Search Departments field to quickly locate a department by name.
		2. Toggle the Use Inheritance to include child departments of a selected parent department.
		3. Click Select All on Current Page to select every department visible on the current page. Else, select the required departments individually. The count of selected departments appears in the bottom of the dialog box.

MESSAGE	ENTIRE MESSAGE	CONTAINS / DOESN'T CONTAIN
		4. Click Select to confirm and apply them as a filter.
		If you want to reset your choices, click Clear Selection . If you want to close the dialog without saving changes, click Cancel .

1. Click **Search**.

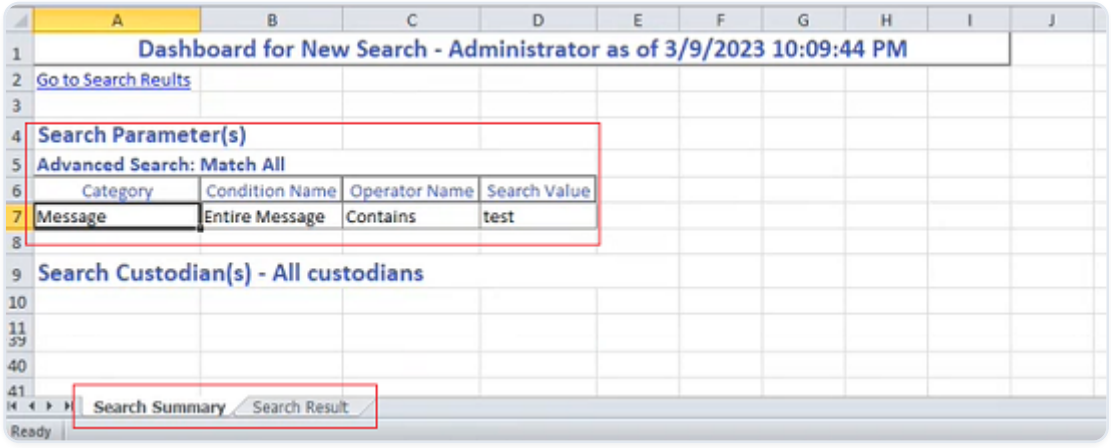
You can perform a new search and optionally save it, or you can view the results of a previously saved search.

Important!

- In Advanced Search, the search text input functionality is updated. In previous releases, when users were providing multiple text input with space, the default logical operator "AND" was getting applied. From now onwards, the default logical operator "OR" is getting applied to get user records.

This operator change from "AND" to "OR" is applied to all kind of searches. If users have previously used spaces while providing the search text inputs, their saved records (saved searches/standard searches/Ongoing searches) will be impacted as the operator is changed from "AND" to "OR".

- Based on the selected attributes, when you export the search report, the Search Summary and Search Report is generated as shown in the sample image below.



Performing a query search

To perform query search

1. Access the **Query Search**tab from the**Investigation**or the**eDiscovery** tab.
2. Specify the following inputs:

CUSTODIANS	**- SELECT ALL TO SEARCH ARCHIVES OF ALL OF THE CUSTODIANS THAT ARE ASSOCIATED WITH THE CASE.**
	- SELECT CUSTOM TO SEARCH ARCHIVES OF THE PARTICULAR CUSTODIANS. THE MANAGE BUTTON APPEARS. CLICK MANAGE TO OPEN THE ADD/REMOVE CUSTODIANS . EXPAND SELECTED CUSTODIANS TO VIEW THE CUSTODIANS SELECTED FOR THIS SEARCH. EXPAND MANAGE CUSTODIANS AND SELECT THE CUSTODIANS REQUIRED FOR THIS SEARCH. CLICK UPDATE TO ADD THESE SELECTED CUSTODIANS AS A SEARCH INPUT. THESE CUSTODIANS ARE LISTED UNDER THE SELECTED CUSTODIANS SECTION.
Query Search	Specify the search query by providing keywords.
	For example, if you are using the Source Type filter option, do the following as required:
	- To filter items from one source type, type a query as `SourceType: ""` . Example : `SourceType: "Exchange"`
	- To filter items from multiple source types, type a query as `SourceType: ("" and "")` . Example , `SourceType: ("Exchange" OR "Citrix")`

Guidelines for specifying queries

The application supports query searches only if the following necessary conditions are followed. Else, the application displays corresponding errors.

CONDITIONS	EXAMPLES
-	The search criteria must be used after the operator and before the query text.
-	The AND/OR/NOT operators must be written in capital letters.
-	The AND/OR logical operator is missing.
-	The extra space(s) between operators is not allowed.
-	The space after bracket is not allowed.
-	The space before colon is not allowed.

> “ ”

Operator-specific conditions Spaces-specific conditions

> “ ”

1. Click **Search**.

You can perform a new search and optionally save it, or you can view the results of a previously saved search.

Search syntax for Advanced Search

Table: Search methods and their syntax for Advanced Search describes the search methods that are available in Advanced Search.

Table: Search methods and their syntax for Advanced Search

SEARCH METHOD	SYNTAX	EXAMPLE AND MORE DETAILS
Phrase search	Use double quotation marks around one or more words to search for the exact phrase.	"cloud computing" finds archived messages with this phrase.
		See About Hit-highlighting and navigating to searched terms .
AND operator search	Use the AND operator between two search terms to find items that contain both search terms.	cloud AND computing finds archived messages with both of the search terms cloud and computing .
		See Boolean operator searches .
OR operator search	Use the OR operator between two search terms to find items that contain at least one of the search terms.	cloud OR computing finds archived messages with the search term cloud , or the search term computing , or both terms.
		See Boolean operator searches .
NOT operator search	Use the NOT operator between search terms to exclude specific search terms.	cloud NOT computing finds archived messages with the search term cloud but not the search term computing .
		See Boolean operator searches .
Single character wildcard search	Use a question mark at the end of a search term to represent a single unspecified character.	appl? finds archived messages with search terms such as apple or apply .

SEARCH METHOD	SYNTAX	EXAMPLE AND MORE DETAILS
	Note: You must enter a search term with at least three characters before the wildcard character.	See Wildcard searches .
Multiple character wildcard search	Use an asterisk at the end of a search term to represent one or more unspecified characters.	comp* finds archived messages with search terms such as computing , computer , or company .
	Note: You must enter a search term with at least three characters before the wildcard character.	See Wildcard searches .
Proximity search	Place quotation marks around two search terms, followed by a tilde and a numerical value to indicate the maximum word count between them.	"cloud computing"~5 finds archived messages with the search terms cloud and computing within five words of each other.
	Note: Insight Personal Archive limits the word count between the 2 search terms to under 50 words.	See Proximity searches .

> “ ”

Note: Searches are not case-sensitive. Capitalizing a search term has no effect on the search results. Invalid search terms are shown in red; hover over invalid search terms to get additional help via Tool Tip.

> “ ”

About stop words and special characters

Stop words

Stop words are a set of commonly used words that Insight Personal Archive ignores when it performs a Search or Advanced Search. Insight Personal Archive treats the following words as stop words:

- `a, an, and, are, as, at` - `be, but, by` - `for` - `if, in, into, is, it` - `no, not` - `of, on, or` - `such` - `that, the, their, then, there, these, they, this, to` - `was, will, with` >**Note:** The stop words are supported in English only, unless your company subscribes to the option to perform enhanced searches in Japanese.

Note the following special cases:

- In phrase searches a stop word acts as a placeholder for any stop word, or nothing.

See About Hit-highlighting and navigating to searched terms.

- The words AND, OR, and NOT act as operators in a Boolean operator search.

See Boolean operator searches.

Special characters

Insight Personal Archive omits the following special characters from searches:

`* @ # $ % ^ & - + = _ { } [ ] , < > ; : / \ ?` **Insight eDiscovery prevents you from entering the following special characters into the search boxes:** `/ \ < > #`

Note the following special cases:

- In phrase searches a special character acts as a placeholder for any special character, or nothing.

See About Hit-highlighting and navigating to searched terms.

- Question marks and asterisks act as wildcard characters in a wildcard search.

See Wildcard searches.

About Hit-highlighting and navigating to searched terms

Hit highlighting visually marks important terms within the item preview pane to quickly identify relevant content. These terms include the terms matched by your search criteria as well as terms in any associated tags.

Highlighting applies to the subject line, message body, attachment names, and the text or HTML preview of attachments. Search terms are highlighted in *orange*, while tags are highlighted in*green*. You can hover over a highlighted term to identify whether it originated from a query or a tag.

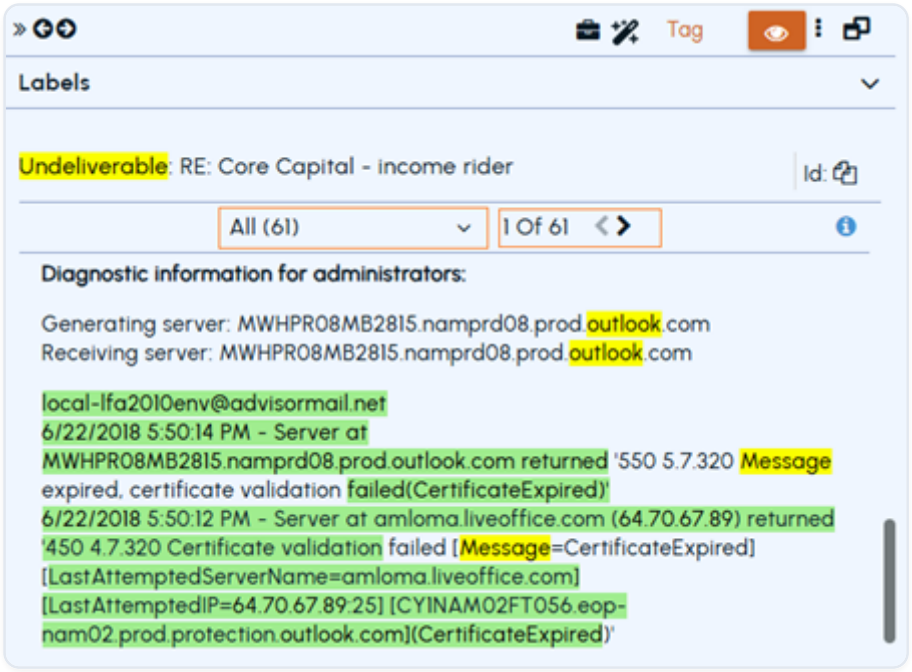
To help you review content efficiently, the preview pane includes a drop-down list showing all matched terms along with their occurrence counts. You can select *All* to view every highlighted term or choose a specific term to focus only on its instances. This targeted highlighting enables faster review of search results, especially when navigating through large message bodies or attachments.

To understand hit highlighting precisely, refer to the following scenario.

1. Create a new search or open an existing one by performing one of the following actions:
    - On the **Investigation**tab, expand**Managed Accounts**and click**New Search** ; or select an existing search from previously created searches, *ongoing searches, standard searches, or advanced ECA searches*.
    - On the **eDiscovery**tab, click**Cases**, search for and select a case. The selected case appears under Cases. Click**New Search** to create a new one, or expand *Research Sets*or*Review Sets* to select an existing search.
2. Use *Advanced Search*or*Query Search* to define your criteria for filtering relevant emails, collaboration content, or files. Click **Search**.

The filtered items (emails, collaboration messages, and files) in the items grid.

1. From the items grid, click the item you want to review. The selected item opens in the preview pane on the right.
2. In the preview pane, click the drop-down arrow to view a list of matched terms and the number of occurrences for each term.



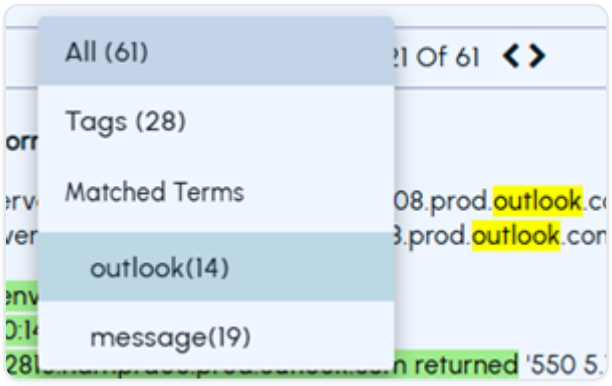
- Use the previous and next arrows to navigate between term hits in the message body.

  > “ ”

  Note: Though highlighting applies to the subject line, message body, attachment name, and the text or HTML preview of attachments, navigation is only available within the message body content.

  > “ ”

- Select *All* to view all highlighted terms, or select a specific term to highlight only its occurrences.



Capabilities

- Supports stop words and special characters

- Handles multi-byte characters
- Highlights terms across line breaks
- Applies highlighting in Native Viewer
- Works with tenants where stop word indexing is enabled
- Supports proximity-based searches
- Provides navigation between highlighted terms

Known Limitations

- Does not highlight search terms with leading or trailing special characters
- Counts/includes stop words in highlights within Native Viewer
- Does not support highlighting in Query Search
- Cannot highlight non-visible metadata such as image information or indexed item metadata

Phrase searches

To search for a phrase, enclose the phrase within double quotation marks. For example:

`"cloud computing"`

The search returns those items that contain the exact phrase *cloud computing*.

> “ ”

Note: A search produces unexpected results if it contains nothing between the quotes, or only white space between the quotes.

> “ ”

About stop words and special characters within search phrases

A phrase search that includes stop words or special characters can return any of the following:

- The exact phrase, including the stop word or special character.
- The phrase with the supplied stop word or special character replaced by other stop words or special characters.

- The phrase without the stop word or special character.

For example:

- The phrase "test and verification" (with quotes) returns items that include results for the exact phrase as well as for "test not verification". It does not return results for test and verification and test verification (without quotes).
- The phrase with two stop words `"cat in the hat"` returns items that include the exact phrase, and also phrases such as *The cat has no hat*, and*cat hat*.

If the exact phrase occurs in the search results, it is highlighted. Otherwise the phrase is not highlighted.

> “ ”

Note: In phrase searches, the*and?characters are treated as special characters, not wildcards.

> “ ”

Boolean operator searches

You can use the Boolean operators AND, OR, and NOT to include or exclude search terms in Quick Search and Advanced Search.

> “ ”

Note: The Boolean operators are supported in English only, unless your company subscribes to the option to perform enhanced searches in Japanese.

> “ ”

- See AND operator search.
- See OR operator search.
- See NOT operator search.
- See About using multiple Boolean operators.
- See About using Boolean operators with phrase searches.

- See About Boolean operators and special characters.

AND operator search

The AND operator is inserted in between two search terms, for example:

`cloud AND computing`

The returned results contain both terms.

> “ ”

Note: Insight Personal Archive treats a space between two search terms as an AND operator.

> “ ”

The following searches are treated identically:

`cloud computing`

`cloud AND computing`

OR operator search

The OR operator is inserted in between two search terms, for example:

`cloud OR computing`

The returned results contain either or both of the terms.

NOT operator search

The NOT operator can be inserted in between two search terms to specify that the first term must be present, and the second term must be absent. For example:

`cloud NOT computing`

Arctera Insight Archiving also lets you begin a search with a NOT operator. For example:

`NOT "cloud computing"`

This search attempts to return every item that does not include the phrase *cloud computing*.

> “ ”

Note: Searches that begin with a NOT operator may fail to complete due to the large number of matching results, especially if you have a large message archive.

> “ ”

About using multiple Boolean operators

You can use multiple Boolean operators in a search to create more complex searches. For example:

`cloud AND computing OR public`

In this example `cloud AND computing` represents one term.

The following items are returned:

- Items with *cloud*and*computing*- Items with*cloud*,*computing*, and*public*- Items with*public*

You can also use brackets to group multiple terms for Boolean processing. For example:

`(cloud (computing OR public)) NOT software`

In this example, the space between `cloud` and `(computing OR public)` is treated as an AND operator.

The following items are returned:

- Items with both *cloud*and*computing*, with no reference to*software*.
- Items with both *cloud*and*public*, with no reference to*software*.

The maximum number of Boolean operators that is allowed in a search is 249.

About using Boolean operators with phrase searches

Boolean operators can be used with phrase searches. For example:

`"cloud computing " OR "public cloud" NOT software`

This search returns the following:

- Items with *cloud computing*, with no reference to*software*.
- Items with *public cloud*, with no reference to*software*.
- Items with *cloud computing*and*public cloud*, with no reference to*software*.

About Boolean operators and special characters

Boolean searches with special character search terms result in invalid searches. For example, if you enter the following:

`cloud OR +`

The special character + is dropped. The effect is a Boolean search with no second term, which is an invalid search.

Here is another example:

`cloud AND - AND computing`

The special character " - " is dropped. The effect is a Boolean search with two adjacent AND operators, which is an invalid search.

Wildcard searches

A wildcard search uses a wildcard character at the end of a search term to represent one or more unspecified characters. The question mark `?` **represents a single character, and the asterisk** `*` represents one or more characters.

For example:

- `appl?` finds archived messages with search terms such as *apple*or*apply*.
- `comp*` finds archived messages with search terms such as *computing*,*computer*, or*company*.

> “ ”

Note: The wildcard character must be placed at the end of the search term. The search term must contain at least three characters before the wildcard character.

```
“ ”
```

In phrase searches, the `*` and `?` characters are treated as special characters, not wildcards.

Proximity searches

Use a proximity search to find two words within a specified distance of each other. To create a proximity search, enclose the two words within quotation marks, and follow them with a tilde character (~) and a numerical value. For example:

`"cloud computing"~5`.

The numerical value specifies the maximum number of words that can exist between the words in quotes.

Note the following when using proximity searches:

- The search terms in the proximity search results are highlighted in the Preview pane and Native views of the attachments. The exact number of words between the search keywords or the order of the keywords does not matter.
- Insight Personal Archive limits the proximity word count to a maximum of 49 words.
- Using wildcard characters in proximity searches is not recommended. When a proximity search includes wildcard characters, the application limits the search proximity value to a maximum of 10 to prevent performance degradation.
- The results from a proximity search can contain stop words, but the stop words are excluded from the proximity word count.

Double-byte character set searches

Arctera Insight Archiving provides some ability to search those languages that contain double-byte characters.

Phrase searches can be used to search for exact phrases with double-byte characters. For example:

`"敏捷的棕色狐狸" AND 3515431`

An enhanced search is available for Japanese terms, if you subscribe to the option for enhanced searches in Japanese.

More Information

About enhanced searches in Japanese

About enhanced searches in Japanese

An option is available to enable the ability to perform enhanced searches in Japanese. This option employs a Japanese language analyzer to provide better search results for different Japanese scripts.

To find out if your company's Arctera Insight Archiving supports enhanced searches in Japanese, ask your Arctera Insight Archiving administrator.

> “ ”

Note: Administrators can contactArctera Services & Supportfor more information on the configuration of this option.

> “ ”

If your company's Arctera Insight Archiving supports enhanced searches in Japanese, note the following about the enhanced search capabilities:

- Searches are supported in any combination of hiragana, kanji, katakana, and romaji scripts.
- Searches are valid for text in the message subject, the message body, attachment extensions, and attachment content.
- Insight eDiscovery's Search supports a minimum of one English or Japanese character.
- The wildcard character limit for any search is one English or Japanese character.

Searchable attachment types

Advanced Search lets you search the content of message attachments.

> “ ”

Note: Password-protected attachments and encrypted attachments are not included in searches.

> “ ”

Table: Searchable attachments lists the attachment types that Arctera Insight Archiving can search.

Table: Searchable attachments

FILE EXTENSION	SEARCHABLE ATTACHMENT TYPES
.accdb	Microsoft Access (text only) 1.0, 2.0, 95 - 2010
.ai	Adobe Illustrator
.asf	Windows Media ASF (metadata only)
.avi	AVI (metadata only)
.csv	Microsoft Excel for Windows
.dbf	Dbase III, IV, V
	Enable Spreadsheet
.doc	Microsoft Word for Windows 1.0 - 2013
	Microsoft Word 2003 XML (text only)
	Microsoft Word 98 (J)
.docx	Microsoft Word for Windows
	Microsoft WordPad
.docm	Microsoft WordPad
.dwg	AutoCAD Drawing 9.0 - 14.0
.emf	Enhanced Metafile (EMF)
	Visio (Page Preview mode WMF/EMF)
.eml	Microsoft Outlook Express (EML)
.htm	HTML (CSS rendering not supported) 1.0 - 4.0

FILE EXTENSION	SEARCHABLE ATTACHMENT TYPES
.html	HTML (CSS rendering not supported)
.hwp	Hangul
	97 - 2010
.ics	vCalendar 2.1
.keynote	Apple iWork Keynote (MacOS, text, and PDF preview) 9
.mht	Encoded mail messages
.mp3	MP3 (ID3 metadata only)
.mp4	MPEG-4 (metadata only)
.mpp	Microsoft Project (table view only) 98 - 2003, 2007, 2010
.msg	Microsoft Outlook (msg) 97 - 2013
.numbers	Apple iWork Numbers (MacOS, text, and PDF preview) 9
.odg	OpenOffice Draw
.odp	IBM Lotus Symphony Presentations 1.x
.ods	Oracle Open Office Calc 3.x
	StarOffice Calc
.odt	OpenOffice Writer 1.1 - 3.0
	Oracle Open Office Writer 3.x
	StarOffice Writer
.oft	Microsoft Outlook Forms Template (OFT) 97 - 2013

FILE EXTENSION	SEARCHABLE ATTACHMENT TYPES
.one	Microsoft OneNote (text only) 2007, 2010
.ots	Oracle Open Office Calc
	StarOffice Calc
.ott	OpenOffice Writer
	Oracle Open Office Writer
.pages	Apple iWork Pages (MacOS, text, and PDF preview) 9
.pdf	Adobe PDF
	1.0 - 1.7 (Acrobat 1 - 10)
	Adobe PDF Package 1.7 (Acrobat 8 - 10)
	Adobe PDF Portfolio 1.7 (Acrobat 8 - 10)
	Graphic embeddings in PDF
.pot	Microsoft PowerPoint for Windows Template 2007 - 2013
.potx	Microsoft PowerPoint for Windows Template
.pps	Microsoft PowerPoint for Windows slide show 2007 - 2013
.ppsx	Microsoft PowerPoint for Windows slide show
.ppt	Microsoft PowerPoint for Windows 3.0 - 2013
.pptx	Microsoft PowerPoint for Windows
.rtf	IBM DCA/RFT
	Microsoft WordPad
	Rich Text Format (RTF)

FILE EXTENSION	SEARCHABLE ATTACHMENT TYPES
.stc	Oracle Open Office Calc
.stw	Oracle Open Office Writer
.swf	Flash (text extraction only) 6.x, 7.x, Lite
.sxw	Oracle Open Office Writer
	StarOffice Writer 5.2 - 9.0
.txt	ANSI Text
	7 & 8 bit
	Unicode Text 3.0, 4.0
.vcf	vCard
	2.1
.vcs	vCalendar
.vsd	Visio 5.0 - 2007
.wav	WAV (metadata only)
.wk1	Lotus 1-2-3
.wk3	Lotus 1-2-3
.wma	Windows Media Audio (metadata only)
.wmf	Visio (Page Preview mode WMF/EMF) 4
	Windows Metafile
.wml	Wireless Markup Language
.wmv	Windows Media Video WMV (metadata only)
.xhtml	XHTML (file ID only)

FILE EXTENSION	SEARCHABLE ATTACHMENT TYPES
.xls	Microsoft Excel for Windows 3.0 - 2013
.xlsb	Microsoft Excel for Windows 2007 - 2013 (Binary)
.xlsm	Microsoft Excel for Windows
.xlsx	Microsoft Excel for Windows
.xlt	Microsoft Excel for Windows
.xltm	Microsoft Excel for Windows
.xml	Extensible Markup Language files
	Microsoft Excel for Windows
	2003 XML (text only)
	XML (text only)
.xmp	Adobe Illustrator XMP CS1 - 6
.xps	Microsoft XPS (text only)
.zip	Compressed file

Search examples and tips

Examples of using Basic, Advanced, and Query Searches

Suppose you want to search for the messages that relate to the resetting of a password. You can enter `password reset` **into the Search box and click Search to perform a Search. The space between** `password` **and** `reset` is treated as an AND operator, so the returned results contain any messages that include both the word *password* and the word *reset*.

Suppose that you now decide to search for the phrase *password reset*, and to exclude from the results any emails that reference the word *Box*. You can use an Advanced Search for this purpose. Click the expand icon to display the Advanced Search options. Your original Search is now shown in the first criteria row.

Insert double quotation marks around `password reset` **to specify it as a phrase. Then click + to add a second criteria row. In the new criteria row, select Doesn't Contain and enter** `Box` in the text field.

Click Search to perform the search. The search returns any items that do not contain *Box*but that contain the exact phrase*password reset*.

Table: List of query search terms lists some possible query search terms along with examples.

Table: List of query search terms

SEARCH TERM	DATA TYPE	DESCRIPTION	EXAMPLE
`_All, Entiremessage`	Text	Searches through all default fields. Add search criterion before query text/ value.	_All:(test or test2)
			"hello world"
			Entiremessage:test
`Attachments.content`	Text	Search by attachment content.	Attachments.content: "Hello World"
`Attachments.extension`	Text	Search by attachment file type (PDF, DOC, docx, and so on.)	Attachments.extension:docx
`Attachments.filename`	Text	Search by the file name of the attachment.	Attachments.filename:Report.PDF
`Attcount`	Integer	Search by the amount of attachments.	Attcount:6
		Note: This query search term does not support the Searches for the	

SEARCH TERM	DATA TYPE	DESCRIPTION	EXAMPLE
		Microsoft Teams messages.	
`Attflag`	Boolean	Search by whether there is an attachment.	Attflag:true
`Atttext`	Text	Search the content of the attachments.	Atttext:Computers
`Atttypes`	Text	Search by the attachment type.	Atttypes:PDF
Bcc	Text	Search by blind carbon copy recipients.	Bcc:JoeBlogs@example.com
			Sender:*@example.com
`Cc`	Text	Search by carbon copy recipients.	Cc:JoeBlogs@example.com
		Note: This query search term does not support the Searches for the Microsoft Teams messages.	Sender:*@example.com
`Classification.tags`	Text	Search by classification tags.	Classification.tags:PII
		Note: This query search term does not support the Searches for the Microsoft Teams messages.	
`FromOrTo`	Text	Search the text in the From and/or To fields of the email.	FromOrTo:JoeBlogs@example.com

SEARCH TERM	DATA TYPE	DESCRIPTION	EXAMPLE
`Hidden`	Boolean	Search whether email is visible to end user or not.	Email Hidden\:
		Note: This query search term does not support the Searches for the Microsoft Teams messages.	Hidden:(1)
			Email Visible:
			NOT Hidden:(1)
`Inbound`	Boolean	Search inbound emails.	Inbound:false
		Note: This query search term does not support the Searches for the Microsoft Teams messages.	
`Internal`	-	Search and retrieves only internal messages exchanged within the same organization.	To include internal emails, use: `Internal:(3)` .
		Note: This query search term does not support the Searches for the Microsoft Teams messages.	To exclude internal emails, use: `NOT Internal:(3)` .
`Ipheader`	IP Address	Search by the IP header of the email.	Specific IP Address\:

SEARCH TERM	DATA TYPE	DESCRIPTION	EXAMPLE
		Note: This query search term does not support the Searches for the Microsoft Teams messages.	Ipheader: (10.201.1.1)
			IP Address using wildcards:
			Ipheader:(10.*.1.1) AND Ipheader: (10.201.?.1)
`MailDate`	Date Time	Search by the date the message was sent.	Closed Range\:
			MailDate: [2018-01-01T00:00:00 TO
			2019-12-31T23:59:59]
			Open Range:
			MailDate: {2018-01-01T00:00:00 TO 2019-12-31T23:59:59}
`Messagesizeinkb`	Floating Point Number	Search by total size of the email.	Messagesizeinkb: \[2.5 TO 5\]
		Note: This query search term does not support the Searches for the Microsoft Teams messages.	

SEARCH TERM	DATA TYPE	DESCRIPTION	EXAMPLE
`Outbound`	Boolean	Search whether a user sent the email.	Outbound:true
		Note: This query search term does not support the Searches for the Microsoft Teams messages.	
`Sender`	Text	Search by the sender address(es).	Sender:JoeBlogs@example.com
			Sender:*@example.com
`Subject`	Text	Search by the subject of the email.	Subject:IT
`SubjectBody`	Text	Search the text in the subject of emails and/or in the content of the email.	SubjectBody:Test
`Textbody`	Text	Search the text content of the email.	Textbody: "Hello World!"
`To`	Text	Search by recipient.	To:JoeBlogs@example.com
			To:*@example.com

Examples of Query Searches:

- Sourcetype:"Exchange"
- SourceType:{"Exchange" OR "Citrix"}
- MailDate:
- Messagesizeinkb:
- Subject:(export OR report)
- MailDate: AND subject:archive
- Sender:(*@domain.com OR*@domain2.com OR*@domain3.com)

- Atttypes:(pdf OR docx) AND atttext:process
- Attachments.filename:(Report.PDF or Export.docx)

Searching the From, To, BCC and CC fields

The To, From, and From/To search options are available within an Advanced Search.

- The To option provides search results from the To, BCC, and CC fields.
- The From option provides search results from the From field.
- The From/To option provides search results from the From and To fields.

Searching within specific email domains

One way to search for items within a specific domain is to enter the domain name in the To field of an Advanced Search.

You can use wildcards to search for results from a group of similar domains. For example: `mycloud*` returns emails for the domains that begin with *mycloud*.

Methods for searching tables and reports

This section includes the following topics:

- About Quick Search and Criteria Search
- Searching tables, lists, and reports

About Quick Search and Criteria Search

The following search interfaces are provided for searching the lists or tables that Insight eDiscovery displays, such as lists of user accounts, reviewers, cases, tags, or reports:

- Quick Search provides a search based on complete or partial words.
- Criteria Search. On some of the pages that provide Quick Search, an additional option named Criteria Search lets you search on specific table criteria.

  > “ ”

  Note: Quick Search and Criteria Search do not support phrase search, Boolean operators, proximity search, or wildcard search. Quick Search is available on the following Insight eDiscovery pages. The pages that also have Criteria Search are indicated in brackets.

  > “ ”

Investigations tab

- Managed Accounts > Accounts (Criteria Search also available)
- Managed Accounts > Mail reassignment
- Batch Processes > Exports

eDiscovery tab

- Reviewers (Criteria Search also available)
- Cases
- *Case Name* > Exports

- *Case Name* > Case History (Criteria Search also available)

Alerts option

- Search Log
- Policy Alert (Criteria Search also available)

See Searching tables, lists, and reports.

Searching tables, lists, and reports

Quick Search provides a fast way to search tables and reports in Insight eDiscovery. For some of the more complex tables and reports Criteria Search is also available. Criteria Search enables you to search within specific table columns.

> “ ”

Note: Quick Search and Criteria Search do not support phrase search, Boolean operators, proximity search, or wildcard search. Searches are not case-sensitive.

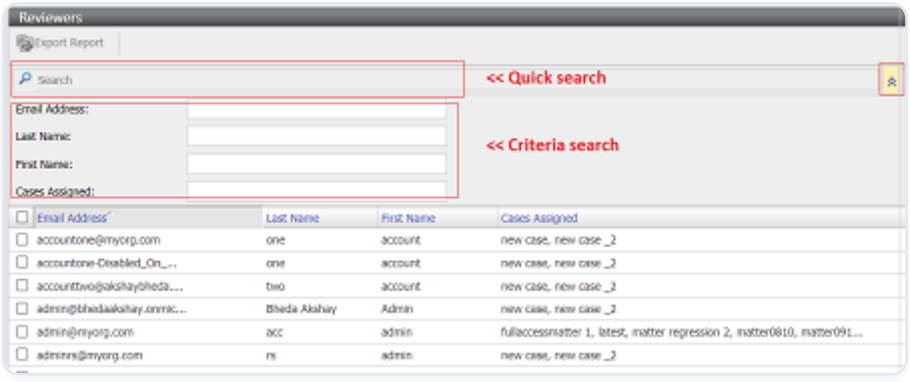
> “ ”

To search tables, lists, and reports

1. In Insight eDiscovery browse to the page that contains the table, list or report that you want to search.

The Quick Search interface is visible.

If a Criteria Search is available in addition to the Quick Search, an Expand icon is present at the end of Search box, as shown here on the Reviewers node:



1. To perform a Quick Search, enter a search term in the Search box. Note the following:
    - In most cases the search begins as soon as you enter the text.
    - The search is performed on the most significant column of the table, such as the email address, the case name, the user, the export name, the search criteria, or the after value.
    - Search terms can consist of complete or partial words. Quick Search does not support phrase search, Boolean operators, proximity search, or wildcard search.
    - Searches are not case-sensitive.
2. On pages that support Criteria Search you can perform a search on specific table criteria. Criteria Search is available on the following pages:
    - Investigations tab > Managed Accounts > Accounts
    - eDiscovery tab > Administration > Reviewers
    - eDiscovery tab > Cases > *Case Name* > Case History
    - Alerts tab > Policy Alert

To perform a Criteria Search, click the **Expand** icon at the end of the Quick Search box, the Criteria Search option is displayed.

Enter your search terms in one or more of the search boxes. Search terms can consist of complete and partial words. Searches are not case-sensitive. Phrase search, Boolean operators, proximity search, and wildcard search are not supported.

Insight eDiscovery returns the search results as you enter the criteria. As you add more criteria the search is filtered on those criteria.

Insight eDiscovery Frequently Asked Questions

This section includes the following topics:

- Frequently Asked Questions

Frequently Asked Questions

The following frequently asked questions provide more information about using Insight eDiscovery.

- What browsers does Insight eDiscovery support?

Insight eDiscovery support is limited to the browsers that are listed in the Arctera Insight Archiving Compatibility List.

See the Arctera Insight Archiving Compatibility List.

- Can I use Insight eDiscovery to access my archived messages in Arctera Insight Archiving?

Yes, you can use Insight eDiscovery to access your messages that are archived in Arctera Insight Archiving. However, certain Insight Personal Archive features such as search filters and active folders are not available from Insight eDiscovery.

- What happens to archived messages when my organization deletes a user account?

The archived messages of a deleted user remain in your organization's archive. The messages are also searchable by reviewers and administrators with the appropriate permissions.

- When are archived messages removed from my organization's archive permanently?

Archived messages are permanently removed in accordance with the retention polices in place for your organization.

- What happens to the messages that are sent to a disabled or deleted user account?

The messages that are sent to a disabled user account are excluded from archiving and do not appear in the archive of the disabled user or the Unassigned Legacy Account. The messages that are sent to a deleted user account appear in the Unassigned Legacy Account.

- Can disabled users access their archived messages in Arctera Insight Archiving?

No, disabled users cannot access their archived messages in Arctera Insight Archiving.

- What attachment types does Insight eDiscovery support?

Insight eDiscovery supports a wide range of attachment types:

See Searchable attachment types.

- Can I search for calendar items or contacts?

No, currently archive calendar items and contacts are not archived.

- What is the character limit of search strings?

You can enter up to 1000 characters in the search field of the Search box.

- Does capitalizing a word affect search results?

No, search terms are not case-sensitive.

- Are there "stop words" that are excluded from search?

Yes. In Advanced Search, common words or "stop words" are automatically dropped from searches.

See About stop words and special characters.

- How can I search for an exact phrase?

In Advanced Search, to search for an exact phrase place double quotation marks around the search term.

See About Hit-highlighting and navigating to searched terms.

- How can I search for two terms at once?

In Basic and Advanced Search enter an uppercase AND between two search terms to find emails containing both term. Use an uppercase OR between two search terms to find emails containing at least one of the terms.

See Boolean operator searches.

- Can I use Boolean Search Logic?

Yes, in Basic and Advanced Search you can use a combination of AND, OR, and NOT with your search terms to construct Boolean search criteria.

See Boolean operator searches.

- Can I conduct a wildcard search?

Yes, in Basic and Advanced Search you can use an asterisk or a question mark at the end of a word to conduct a wildcard search.

See Wildcard searches.

- Can I use the proximity of words as a search criteria?

Yes, in Basic and Advanced Search you can enter two search terms in quotation marks followed by a tilde and a numerical value to represent the word count proximity.

See Proximity searches.

- What is the maximum number of messages that I can export?

You can export up to 200,000 messages.

- Why is the export to NSF option unavailable in the Export Options?

The NSF export option is only available when a Domino server has been configured as the mail server type in the archive settings. Contact your Archive Administrator for more information.

Best practices, limitations, and known issues

This section includes the following topics:

- Best practices and limitations with Insight eDiscovery
- Known issues with Insight eDiscovery

Best practices and limitations with Insight eDiscovery

General

- Although the users that are provisioned for archive access can view their messages from Insight eDiscovery, we recommend that users work with their messages using Insight Personal Archive. Additional functionality such as search filters and active folders is provided when users work with archived messages in Insight Personal Archive.

Search

- Search times improve after a user performs their first search during each session because Insight eDiscovery keeps the index in memory during each session.
- Inaccurate search results may be returned if the hyphen in a domain name is included because the hyphen is dropped.
- Use Advanced Search to cut down search results If you see a message stating that you have exceeded the number of search results that can be returned.
- Search terms are limited to 1,000 characters.
- Use Query Search to accurately find and to reduce search results.
- Searching with empty quotes or whitespace within quotes produces unexpected results.
- Searching with an empty field produces an error.
- Tags are only searchable on the Tags node, which is located within the Investigations tab.
- The search interface prevents the user from entering the following special characters: / \ # \< \>
- The maximum number of Boolean operands in a search is 249. Note that *roof rusted OR paint* has two Boolean operands: the OR, and the space between the first two terms. The space is treated as an AND operator.

Foreign language search constraints

- Unable to search for DBCS/hiascii char in the Quick Search field in Alerts.
- Unable to search for DBCS/hiascii char in Policy Names - Alerts.
- Unable to search for DBCs/hiascii char in Advanced/Query search - comments
- Unable to search for DBCs/hiascii char in Advanced/Query search - Alert Emails
- Search fails in Managed Account if last name includes non-ASCII characters
- Search fails in Reviewers Account if last name includes non-ASCII characters
- Corrupted DBCS/hiascii character results in Case Review Status Tag name and description
- Case Status has the hard-code issue risk

Known issues with Insight eDiscovery

- Saved searches named using Japanese double-byte characters are not saved correctly and result in the search results not being displayed.
- Keywords within a message body may be highlighted inconsistently.
- You may receive a security error message when downloading data from Insight eDiscovery.

Workaround - close the security error message window and retry the download.

- Bcc recipients are currently not searchable in Insight eDiscovery.
- Due to limitations of Microsoft Exchange journaling, the Bcc recipients currently displayed depends on the version of Exchange the message sender and Bcc recipients use. Please refer to the following table for more information.

Table: Exchange versions displayed in Bcc field

SENDER EXCHANGE VERSION	EXCHANGE VERSIONS DISPLAYED IN BCC FIELD WHEN VIEWED FROM EXCHANGE 2010 ENVIRONMENT	EXCHANGE VERSIONS DISPLAYED IN BCC FIELD WHEN VIEWED FROM EXCHANGE 2007 ENVIRONMENT	EXCHANGE VERSIONS DISPLAYED IN BCC FIELD WHEN VIEWED FROM EXCHANGE 2003 (STANDARD) ENVIRONMENT	EXCHANGE VERSIONS DISPLAYED IN BCC FIELD WHEN VIEWED FROM EXCHANGE 2003 (ENVELOPE) ENVIRONMENT
Exchange 2010	All	Exchange 2007	None	None

SENDER EXCHANGE VERSION	EXCHANGE VERSIONS DISPLAYED IN BCC FIELD WHEN VIEWED FROM EXCHANGE 2010 ENVIRONMENT	EXCHANGE VERSIONS DISPLAYED IN BCC FIELD WHEN VIEWED FROM EXCHANGE 2007 ENVIRONMENT	EXCHANGE VERSIONS DISPLAYED IN BCC FIELD WHEN VIEWED FROM EXCHANGE 2003 (STANDARD) ENVIRONMENT	EXCHANGE VERSIONS DISPLAYED IN BCC FIELD WHEN VIEWED FROM EXCHANGE 2003 (ENVELOPE) ENVIRONMENT
Exchange 2007	Exchange 2010	All	None	Exchange 2003 (Envelope)
Exchange 2003 (Standard)	Exchange 2010	Exchange 2007	None	None
Exchange 2003 (Envelope)	Exchange 2010	Exchange 2007	None	All

Insight eDiscovery updates in previous releases

This section includes the following topics:

- About the Insight eDiscovery updates in previous releases

About the Insight eDiscovery updates in previous releases

About the Insight eDiscovery updates in previous releases

The following page describes the most recent updates for Insight eDiscovery:

See Introducing Arctera Insight eDiscovery.

For full details of all the updates in each release of the Arctera Insight Archiving service suite, see the Arctera Insight Archiving release notes. You can access the release notes from this article on the Arctera Support website: