AvePoint® DocAve® 6 User Guide

DocAve® 6 eDiscovery

User Guide

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The Enterprise-Class **Management Platform** for **SharePoint®** Governance

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What's New in this Guide

- Minor edits and cover page update for current release.

About DocAve eDiscovery

DocAve eDiscovery allows organizations to respond to discovery, compliance, and legal requests quickly and completely. The product provides full context search of all active and archived Microsoft SharePoint content and across multiple site collections by keyword, key phrase, or combination. It can also search and hold content and filter it by creator or modifier. DocAve eDiscovery supports data exports in the standard format to prepare for external reviews and provides export capability to the document management tool (Concordance). eDiscovery also implements legal holds on SharePoint items to "freeze" files and limit access/modification rights to create immutable, full-fidelity copies of held content.

***Note**: In the current DocAve version, eDiscovery supports SharePoint 2010 and SharePoint 2013.

Complementary Products

Many products and product suites on the DocAve 6 platform work in conjunction with one another. The following products are recommended for use with DocAve eDiscovery:

- DocAve Granular Backup and Restore to back up all farm content and restore content down to the item level
- DocAve Replicator for copying SharePoint content within the same SharePoint farm or from one SharePoint farm to another
- DocAve Content Manager for restructuring or moving SharePoint content
- DocAve Report Center to examine pain points in the SharePoint infrastructure and report on SharePoint user behavior and changes
- DocAve Data Protection to set backup and restore points prior to adjusting SharePoint governance policies in this product

Submitting Documentation Feedback to AvePoint

AvePoint encourages customers to provide feedback regarding our product documentation. You can Submit Your Feedback on our website.

Before You Begin

Refer to the sections for system and farm requirements prior to installing and using eDiscovery.

AvePoint's Testing Policy and Environment Support

Supported Hardware

AvePoint is committed to maintaining a hardware agnostic platform to ensure that DocAve operates on common Windows file sharing and virtualization platforms. To ensure that DocAve is hardware agnostic, AvePoint tests hardware that is intended to support SharePoint and DocAve infrastructure, storage targets, and hardware-based backup and recovery solutions, as supported by AvePoint's partnerships. AvePoint directly integrates with the following platforms: any Net Share, IBM Storwize Family, FTP, Amazon S3, AT&T Synaptic, Dropbox, Box, Caringo Storage, Del DX Storage, EMC Centra, HDS Hitachi Content Platform, Rackspace Cloud Files, TSM, Network File System, and Windows Azure Storage.

All other hardware platforms that support UNC addressable storage devices are supported.

***Note:** Most of the hardware partnerships referenced in this guide are intended to make use of advanced functionality (such as snapshot mirroring, BLOB snapshots, indexing, long-term storage, WORM storage, etc.), and are not indications that any changes to the product are required for basic support. In most cases, hardware can be supported with no change to the product.

Supported Backup and Recovery

DocAve supports BLOB backup storage according to the list of hardware platforms above. BLOB snapshot functionally, however, is currently only supported on OEM versions and NetApp hardware.

DocAve supports SQL content and Application database backups via the SharePoint Volume Shadow Copy Service (VSS) on all Windows and SQL server platforms listed above. DocAve also supports snapshot-based SharePoint VSS on all hardware listed above where the hardware partner has certified support with Microsoft.

DocAve supports application and configuration server backups for all the supported software environments listed above. DocAve 6 SP5 supports VM backup via Hyper-V/VMWare for the following operating systems: Windows Server 2008 R2, Windows Server 2012, Windows Server 2012 R2, and Microsoft Hyper–V Server 2012 R2.

Configuration

In order to use eDiscovery, the DocAve 6 platform must be installed and configured properly on your farm. eDiscovery will not function without DocAve 6 present on the farm.

Agents

DocAve Agents are responsible for running DocAve jobs and interacting with the SharePoint object model. For eDiscovery, a DocAve Agent must be installed on the Search Service Application server where it allows eDiscovery to search SharePoint documents/items.

***Note**: The use of system resources on a server increases when the installed agent is performing actions, so it may affect server performance. However, if the agent installed on a server is not being used, the use of system resources is very low; therefore, the effect on server performance is negligible.

For instructions on installing the DocAve Platform, DocAve Manager, and DocAve Agents, refer to the DocAve 6 Installation Guide.

Required Permissions

To install and use eDiscovery properly, the DocAve Agent account must have the following permissions applied:

1. Local System Permissions: These permissions are automatically configured by DocAve during installation.
2. If there are no strict limitations within your organization on the permissions that can be applied, you can simply add the **DocAve Agent Account** to the local **Administrators** group to apply all of the required permissions.
3. **SharePoint Permissions**: These permissions must be manually configured prior to using DocAve 6 eDiscovery; they are not automatically configured.
    - Full Control to all zones of all Web applications via User Policy for Web Applications
    - Managed Metadata Service: Term Store Administrator
    - Search Service: Full Control
4. **SQL Permissions**: These permissions must be manually configured prior to using DocAve 6 eDiscovery; they are not automatically configured.
    - Database Role of **db_owner** for all the databases related with SharePoint, including content databases, SharePoint configuration database, and Central Admin database.

Local System Permissions

Some local system permissions are automatically configured during DocAve 6 installation. The user will be set up as a member of the following local groups:

- IIS WPG (for IIS 6.0) or IIS IUSRS (for IIS 7.0)
- Performance monitor users
- DocAve users (this group is created by DocAve automatically with following permissions):
    - Full Control to the registry of HKEY LOCAL MACHINE\SOFTWARE\AvePoint\DocAve6
    - Full Control to the registry of HKEY_LOCAL_MACHINE\System\CurrentControlSet\Services\eventlog
    - Full Control to the communication certificate
    - Permission of **Log on as a batch job** (it can be found within **Control Panel** > **Administrative Tools** > **Local Security Policy** > **Security Settings** > **Local Policies** > **User Rights Assignment**)
    - Full Control permission for DocAve Agent installation directory

Health Analyzer

AvePoint recommends using Health Analyzer to verify that you meet the prerequisites necessary to use DocAve eDiscovery.

***Note:** Only users in the **Administrators** group can use Health Analyzer.

For more information about Health Analyzer, refer to the DocAve 6 Installation Guide.

Getting Started

Refer to the sections below for important information on getting started with eDiscovery.

Launching eDiscovery

To launch eDiscovery and access its functionality, complete the following steps:

1. Log in to DocAve. If you are already in the software, click the **DocAve** tab.
2. Click **Compliance** on the left-hand navigation menu to view the compliance modules.
3. Click **eDiscovery** to launch this module.

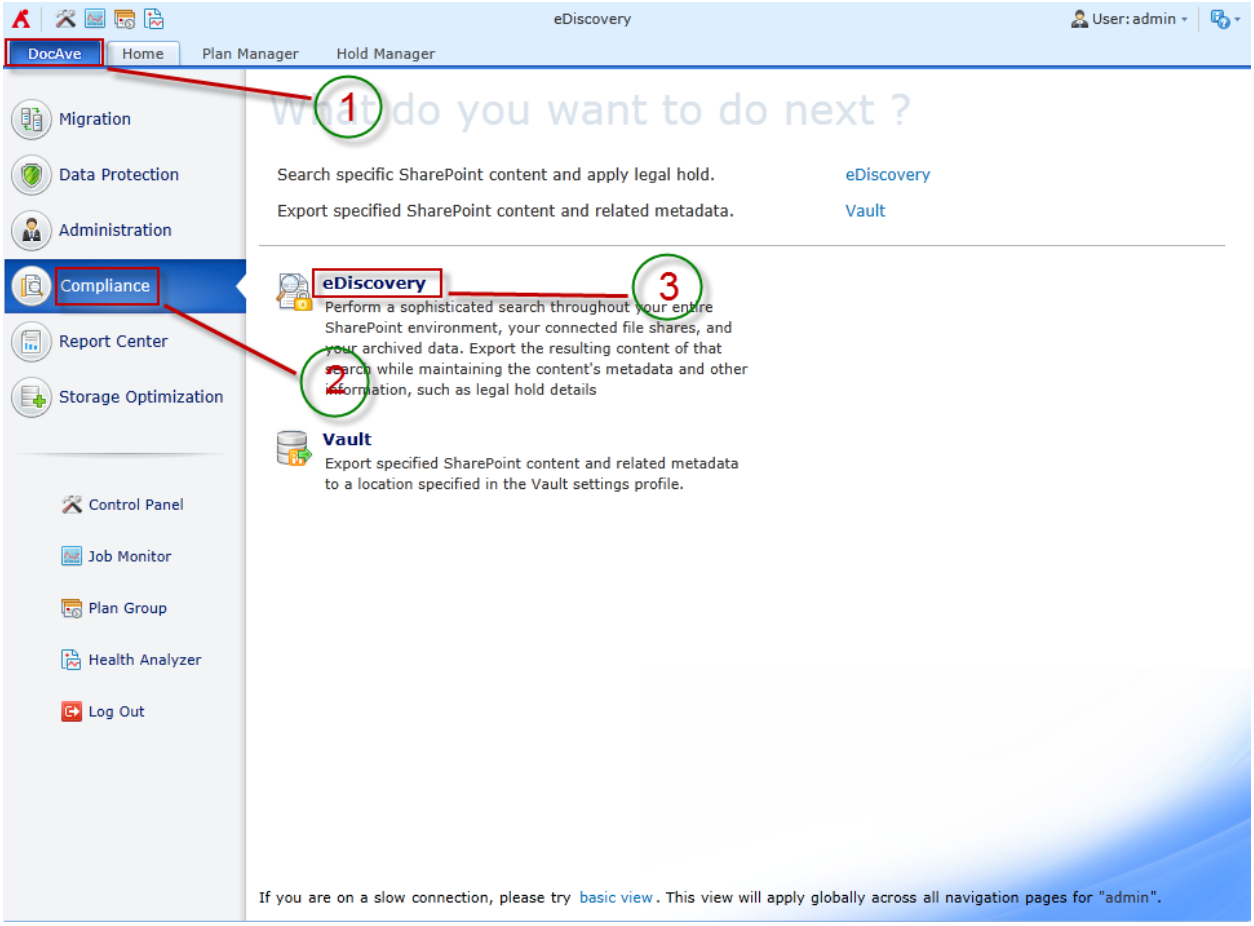


Figure 1: DocAve module launch window.

Navigating DocAve

DocAve mimics the look and feel of many Windows products, making for an intuitive and familiar working environment. While there are many windows, pop-up displays, and messages within DocAve products, they share similar features and are navigated in the same ways.

Below is a sample window in DocAve. It features a familiar, dynamic ribbon, and a searchable, content list view.

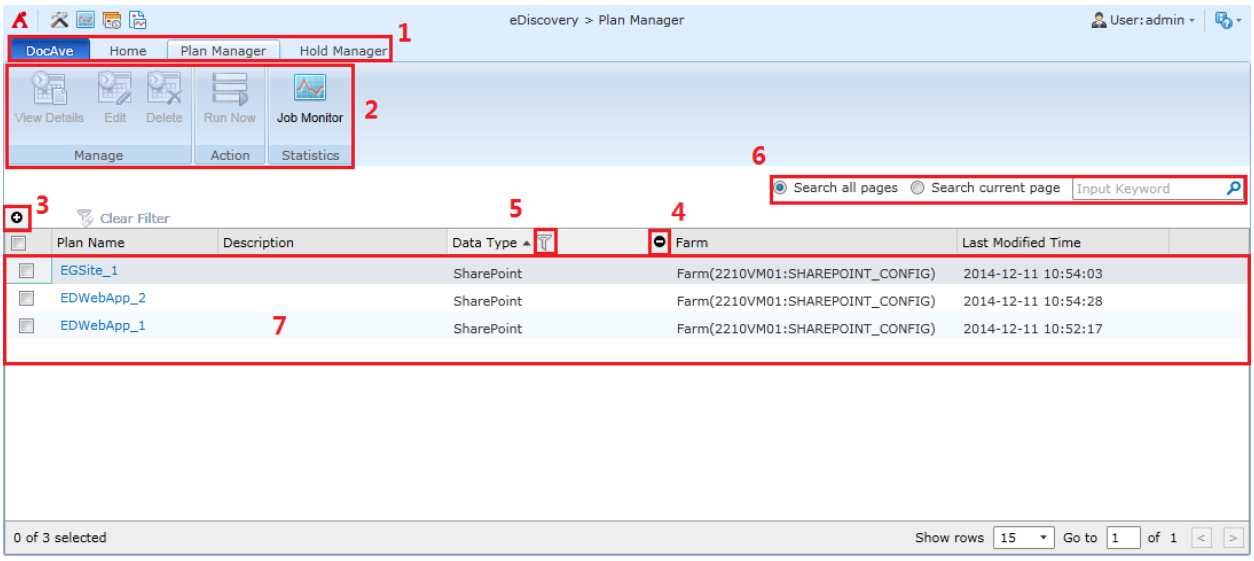


Figure 2: Navigating DocAve.

1. Ribbon Tabs— Allows users to navigate to the DocAve Welcome page and within the active module.
2. Ribbon Panes – Allows users to access the functionality of the active DocAve module.
3. Manage columns (⊕) – Allows users to manage which columns are displayed in the list. Click the manage columns (⊕) button, and then select the checkbox next to the column name in the drop-down list.
4. Hide the column (⊖) – Allows users to hide the selected column.
5. Filter the column ( ) – Allows users to filter the information in the List View. Click the filter the column ( ) button next to the column and then select the checkbox next to the column name.
6. **Search** – Allows users to search the List View pane for a keyword or phrase. You can select **Search all pages** or **Search current page** to define the search scope.
   ***Note:** The search function is not case sensitive.
7. Management Pane – Displays the actionable content of the DocAve module.

User Interface Overview

The eDiscovery user interface launches in the eDiscovery landing page. This page allows for quick access to a list of eDiscovery features:

1. **Ribbon** – Shows the available actions for the selected nodes. This content is dynamic; it will often change depending on what is selected in the SharePoint tree.
2. **What is eDiscovery?** – Summarizes the main functions of eDiscovery with a brief instruction and graphics.
3. **What do you want to do next?** – Guides you to perform the specified action directly by clicking the corresponding link.
4. **What can these settings do for you?** – Explains the function of some settings in eDiscovery including Version Crawling, Search Result Location, and Compliance Configuration.

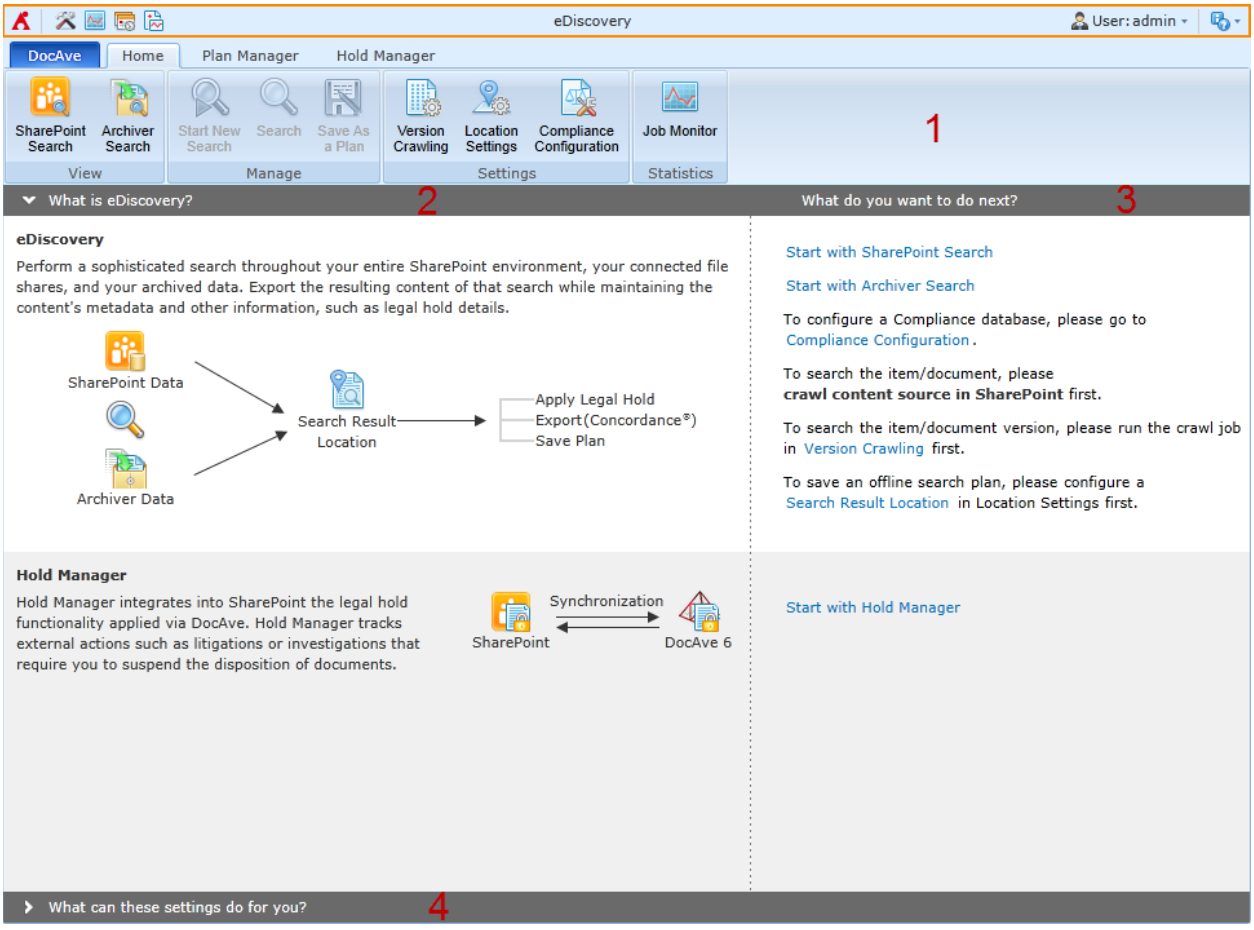


Figure 3: eDiscovery User Interface.

Pre-eDiscovery Job Configurations

The following configurations must be set prior to running an eDiscovery job. Follow the instructions below to set up the Compliance Configuration and configure the location settings and version crawling settings.

Compliance Configuration

Prior to running an eDiscovery job, you must set up Compliance Configuration, including the database and the logical device. The compliance database is used to hold information and search job-related data of offline searches for each farm. The logical device is used to store the copies of the items and documents that are held.

Configuring a Compliance Database

You need to configure a compliance database in SQL for every farm that will be using eDiscovery. To configure a compliance database, complete the following steps:

1. On the **Home** tab in the eDiscovery user interface, click **Compliance Configuration** in the **Settings** group on the ribbon. The Compliance Configuration interface opens in a new window.
2. Select the farm displayed in the workspace where you want to configure a compliance database. The **Configure Database** and **Configure Logical Device** buttons on the ribbon will now be enabled.
3. Click **Configure Database** on the ribbon. The Compliance Database Configuration interface appears.
4. Configure the following settings for the compliance database:
    - **Configure Compliance Database** – Enter a new server and name in the **Database Server** and **Database Name** fields.

      ***Note:** If the specified database is used for an Archiver search, ensure that it can be accessed by DocAve Manager and DocAve Media Service. If the specified database is used for a SharePoint search, ensure that it can be accessed by DocAve Manager and DocAve Agent. If the database is used for both Archiver and a SharePoint search, it must be accessed by DocAve Manager, DocAve Agent, and DocAve Media Service. If the specified database you entered does not exist, a database with the specified name will be automatically created.

    - **Authentication** – Select the **Windows authentication** or **SQL authentication** mode for the database.

      ***Note**: Enter the **Account** and **Password** for the selected authentication mode. You can also validate the account by clicking **Validation Test**.

If the selected database collapsed, eDiscovery has an option to store data in the compliance database by transferring to a standby database. Activate this option by checking the **Failover Database Server** checkbox.

- **Advanced Settings** – If you want to configure a compliance database for the selected farm by editing the connection string directly, click **Advanced**, and then check the **Edit Connection String Directly** checkbox to activate this feature. Enter the connection string according to the **Connection String Example** to the left. For more information about editing the connection string, refer to the *Microsoft SQL Server* user guide.

5. Click **OK** to save the configurations.
6. Repeat the steps above to configure a compliance database for another farm.

Configuring a Logical Device

A logical device storing the copies of the items and documents that have been held must be configured for each farm. To configure a logical device, complete the following steps:

1. On the **Home** tab in the eDiscovery user interface, click **Compliance Configuration** in the **Settings** group on the ribbon. The Compliance Configuration interface opens in a new window.
2. Select the farm displayed in the workspace where you want to configure a logical device. The **Configure Database** and **Configure Logical Device** buttons on the ribbon will now be enabled.
3. Click **Configure Logical Device** on the ribbon. The Logical Device Configuration interface appears.
4. Select a previously-created logical device from the **Specify a logical device** drop-down list, or create a new one for the selected farm. For more information about creating a logical device, please refer to the DocAve 6 Control Panel Reference Guide.
5. Click **OK** to save your configurations.

Location Settings

In the Location Settings in eDiscovery, you can configure an export location to store the exported data and a search result location to store the search results. If you want to save an eDiscovery search plan, an export location and a search result location must be configured first.

To enter the Location Settings interface, click **Location Settings** in the **Settings** group on the ribbon of the **Home** tab in the eDiscovery user interface.

Configuring Export Location

An export location must be configured if you want to export the search results or the hold items in a specified location. When you open the Locations Settings interface, the Export Location mode is selected by default, and all the previously created export locations are displayed in the main panel.

To search the desired export locations and define which information is displayed in the Export Location mode, configure the following settings:

- **Search** – Enter the keyword of an export location name or the description in the search textbox to search the desired export locations within the specified search scope (**Search all pages** or **Search current page**).

  ***Note:** The search function is not case sensitive.

- ⊕ – Manage which columns are displayed in the list so that only information you want to see is shown. Click ⊕, and then check the checkbox next to the column name to have that column shown in the list.
- ⊖ – Click ⊖ in the column name to hide the column.

To manage your export location, use any of the following tools:

- **Create** – Click **Create** in the **Manage** group on the ribbon. The Create Export Location window appears. Configure the following settings:
  - **Name and Description** – Enter a **Name** for the export location that you are creating. Then enter an optional **Description** for future reference.
  - **Path** – Enter the **UNC path** in the following format**:** \\admin-PC\c$\data or \\admin-PC\shared folder.

    ***Note**: If the specified folder does not exist, a folder with the designated name will be created at the specified location by default.

  - Enter the **Username** and **Password** in the corresponding textboxes, and then click **Validation Test**. DocAve will test the path and user information to make sure they are valid.
- **View Details** – Select an existing export location from the Export Location page by checking the checkbox next to the location, and click **View Details** in the **Manage** group on the ribbon. The View Details interface appears. If you want to change the settings of this export location, click **Edit** on the ribbon or on the bottom right of the window.
- **Edit** – Select an existing export location from the Export Location page by checking the checkbox next to the location, and click **Edit** in the **Manage** group on the ribbon.
- **Delete** – Select one or more existing export locations in the Export Location page, and click **Delete** in the **Manage** group on the ribbon.

Configuring Search Result Location

A search result location must be configured when you run a SharePoint search job or an Archiver search job on schedule. All of the search results will be stored in the specified search result location.

***Note:** The search results of a search job will be deleted in the search result location along with the deletion of the job in Job Monitor.

To configure a search result location, complete the following steps:

1. On the **Home** tab in the eDiscovery user interface, click **Location Settings** in the **Settings** group on the ribbon. The Location Settings interface appears.
2. Click **Search Result Location** in the **Mode** group on the ribbon. The Search Result Location Configuration page appears.
3. Enter the **UNC path** in the following format**:** \\admin-PC\c$\data or \\admin-PC\shared folder.

   ***Note**: If the specified folder does not exist, a folder with the designated name will be created at the specified location

4. Enter the **Username** and **Password** in the corresponding textboxes, and then click **Validation Test**. DocAve will test the path and user information to make sure they are valid.
5. Click **Save** to save your configurations.

Document/Item Version Crawling

If you want to use the advanced SharePoint search conditions **item version** and **document version** to search for specific items or documents, you must crawl the item/document version first. DocAve Version Crawling extends from SharePoint Search Service Applications allowing you to crawl the desired item/document versions.

Before crawling the item/document versions, a content source containing the Web application whose document and item versions will be crawled also must be created. The sections below details the steps to create a content source and perform item/document version crawling.

Enabling Search Service Application

The corresponding search service application must be enabled before creating a content source. To activate the SharePoint search service application, complete the following steps:

1. On the **Home** tab in the eDiscovery user interface, click **Version Crawling** in the **Settings** group on the ribbon. The Version Crawling interface appears with all the available Search Service Applications for all available farms displayed.
2. All of the available Search Service Applications for all available farms are displayed. Select the Search Service Application that you want to use for configuring the content source by checking the checkbox next to the application.
3. Click **Enable** in the **Actions** group on the ribbon to activate the selected Search Service Application.
4. Proceed to the next section to configure and manage your content sources.

Configuring and Managing Content Sources

A content source is a location that stores the resources that you want to crawl. You can add one or more Web applications to a content source and all the item/document versions will be crawled.

Use the following tools in the Configure Content Source interface to configure and manage content sources:

- **Create** – Click **Create** in the **Manage Content Source** group on the ribbon. The Create a Content Source window appears. Complete the following steps to configure settings:
    - **Content Source Name** – Enter a **Name** for the content source you are creating. Then enter an optional **Description** for this content source for future references.
    - **Content Source Selection** – Click on the farm name in the **Content Source Selection** field to expand the tree. Select the Web applications that you want to add to this content source. All of the documents and items under the selected Web applications will be crawled.
    - Click **OK** to save this content source, or click **OK and Crawl Now** to save this content source and start crawling at the same time. The **Crawl Now** window appears after clicking **OK and Crawl Now.** Refer to Crawling Options to select a crawl type.
    - Click **OK** to finish and return to the **Configure Content Source** interface.
- **View Details** – Select an existing content source in the Configure Content Source page and click **View Details** in the **Manage Content Source** group. The View Details interface appears. If you want to change the settings of this content source, click **Edit** in the **Manage** group on the ribbon.
- **Edit** – Select an existing content source and click **Edit** in the **Manage Content Source** group on the ribbon.
- **Delete** – Select one or more existing content sources that you want to delete, and click **Delete** in the **Manage Content Source** group on the ribbon.
- **Crawling Schedule** – Click **Crawling Schedule** in the **Crawl Settings** group on the ribbon to configure a crawling schedule for the existing content sources. For more information about configuring a crawling schedule, refer to Configuring a Crawling Schedule.
- **Start** – Instead of crawling the existing content sources on schedule, you can click **Start** in the **Crawl Settings** group on the ribbon to start a full or an incremental crawl for the selected content sources. For more information about full and incremental crawling, refer to Crawling Options.
- **Refresh** – Click **Refresh** in the **Refresh** group on the ribbon to update the content source information displayed in the interface.

Crawling Options

A **Full Crawl** crawls all of the item/document versions under the Web applications that are added to the selected content source. Full Crawl takes more time to complete than the incremental crawl. An **Incremental Crawl** crawls the item/document version that is updated since the last version crawling. If it is the first time to perform the Incremental Crawl, the Full Crawl will run.

Configuring a Crawling Schedule

If you want to crawl the item/document version on a schedule, follow the steps below to configure a crawling schedule:

1. Select one or more content sources that you want to configure a crawling schedule for by checking the checkboxes next to the content source names.
2. Click **Crawling Schedule** from the **Crawling Settings** group on the ribbon. The Crawling Settings interface appears.
3. Click the **Configure the schedule myself** radio button. The Schedule Settings field appears.
4. Click **Add Schedule** to configure a custom schedule. The Add Schedule interface pops up.
5. Configure the following settings for the schedule you are adding in the pop-up interface:
    - **Options** – Select **Full Crawl** or **Incremental Crawl** by clicking the corresponding radio button. For more information about the full crawl and incremental crawl, refer to Crawling Options.
    - **Type** – Select the time interval for this schedule. You can configure the schedule by hour, by day, by week, or by month by clicking the corresponding radio button.
    - **Schedule Settings** – Configure the frequency of the time interval for this schedule by entering a positive integer in the textbox. If you wish to set up a more specific schedule, select the **Advanced** checkbox, and more options will appear depending on the time unit you have selected. For more information about the advanced schedule settings, refer to Advanced Schedule Settings.
    - **Range of Recurrence** – Specify the **Start time** for crawling jobs. Select one of the following options for the end time and configure its settings:
        - **No end date** – The crawling jobs will run on the configured schedule until you manually end it.
        - **End after __ occurrence(s)** – The crawling jobs will stop running after the number of times you specify here.
        - **End by __** – The crawling jobs will end on the date and time you specify here.
6. Click **OK** to save your configured schedule, or click **Cancel** to close the Add Schedule interface without saving.
7. If you want to add more custom schedules, click **Add Schedule** again and repeat the steps above. Click **Calendar View** to view the schedule in a calendar.

8. Click **OK** to save the schedule, or click **OK and Crawl Now** to start the crawl now.

Advanced Schedule Settings

The advanced schedule settings are configured differently based on the schedule type you have selected:

- If you selected **By hour**, select one of the following options and configure its settings:
    - **Specify production time: From __ to __** – Specify the production time. DocAve will run the crawling job in the specified production time frame.

      ***Note:** All search jobs that started within this time frame will finish even if the end time is reached.

    - **Select time below** – Specify the time you want to run the search job. To add several time points, click **Add**.
- If you selected **By week**, configure the following settings:
    - **Run every __ week(s)** – Enter the frequency in terms of weeks in the textbox.
    - **On __** – Specify the days of the week to run the crawling job on.
- If you selected **By month**, select one of the following options and configure its settings:
    - **On day __ of __** – Select the day of the specific months to run the crawling jobs. For example, if you select **On day 3 of January** and **July**, the crawling jobs will run on the third of January and July.
    - **Day __ of every __ month(s)** – Select the day of the month, and frequency in terms of months to run the crawling jobs on. For example, if you select **Day 3 of every 3 month(s)**, the crawling jobs will run every three months, on the third of the month.
    - **The __ __of every __ month(s)** – Specify on which occurrence of which days of the month, and the frequency in terms of months to run the crawling jobs. For example, if you select **The First Monday of every 3 month(s)**, the crawling jobs will run every three months, on the first Monday of the month.
    - **The __ __ of __** – Specify on which occurrence of which days of which month to run the crawling jobs. For example, if you select **The First Monday of January and July**, the crawling jobs will run on the first Monday of January and July.

Performing SharePoint Search

SharePoint Search allows you to search any desired documents and items among massive SharePoint documents and items in real-time or on schedule. You can optionally choose to export the search results or apply legal hold to the search results. The section below instructs the steps to perform a SharePoint Search.

Performing a Real-Time SharePoint Search

Real-time SharePoint Search is performed immediately. You can apply legal holds or export the desired search results. To perform a real-time SharePoint Search, complete the following steps:

1. On the **Home** tab, ensure that the SharePoint Search is enabled, and click on the farm name in the **Scope** pane to expand the tree.
2. Select the tree nodes where you want to perform the SharePoint Search in the expanded tree.
3. Enter the keywords in the search textbox to the right. Wildcards are supported. Refer to Search Keyword Expressions for the detailed information about the keyword expression.
4. If you want to use the Advanced Search, click **Advanced** in the textbox and the **Advanced Search** field appears. For more information about the Advanced Search, refer to Advanced SharePoint Search Conditions.
5. Click **Search** in the **Manage** group to search the documents and items according to the search keywords you entered. All of the documents and items meeting the search conditions are displayed in the Search Result interface, under the **Search Result** tab. For more information about managing the search results, refer to Managing Search Results.
6. You can download the search results by clicking **Download Search Results** on the upper right-hand corner of the Search Results area. For more information, refer to Downloading Search Results.
7. On the **Home** tab, click **Start New Search** to perform a new search by repeating the steps above.

Managing Search Results

After performing a real-time search, all the searched documents and items are displayed under the **Search Result** tab. You can apply holds on the desired search results or export the selected search result to a desired location.

To manage your search results further, you can do the following actions:

- **Apply Legal Hold** – Apply legal holds to any desired search results. Once held, no one can edit the item/document. Select the searched documents/items where you want to apply legal holds, and click **Apply Legal Hold** in the **Actions** group. The **Apply Legal Hold** window appears.

- **Export** – Export the searched results to an export location for further use. Select the searched documents/items that you want to export and click **Export** in the **Actions** group. The **Export Settings** window appears. Select an export format for the selected search results, **Concordance Load File** or **EDRM XML**. Select a previously-created export location from the drop-down list or click **New Export Location** to create a new one. For more information about creating a new export location, refer to Configuring Export Location.

  ***Note**: Integrated with Concordance System, the exported content can be managed by the Concordance platform by default.

Performing a Scheduled SharePoint Search

You can build a SharePoint Search plan to search specific SharePoint documents and items on schedule. It allows you to export and apply legal holds to all of the search results. As long as there are new documents or items searched, it will be exported or held according to the action you take in the plan.

To build a SharePoint Search plan, complete the following steps:

1. On the **Home** tab, ensure that **SharePoint Search** is enabled on the ribbon, and click on the farm name in the **Scope** pane to expand the tree.
2. Select the tree nodes where you want to perform the SharePoint Search in the expanded tree.
3. Enter the keywords in the search textbox to the right. Wildcards are supported. Refer to Search Keyword Expressions for the detailed information about the keyword expression.
4. If you want to use the Advanced Search, click **Advanced** in the textbox and the Advanced Search field appears. For more information about the Advanced Search, refer to Advanced SharePoint Search Conditions.
5. Click **Save As a Plan** in the **Commit** group. The **Save As a Plan** interface appears. Configure the following settings:
   - **Plan Name** – Enter a **Name** for the plan, and add an optional **Description**.
   - **Hold and Export Actions** – Choose the actions you want to perform on the search results by selecting the corresponding (**Hold** or **Export**) checkboxes. For more information, refer to Hold and Export Actions.
   - **Notification** – Select a previously-created notification profile from the drop-down list to notify the specified user of the job status according to the profile settings, or click **New Notification Profile** to create a new one. For more details, refer to DocAve 6 Control Panel User Guide.
   - **Schedule** – Choose whether to configure a schedule for this plan by clicking the corresponding radio button. **No schedule** means that the plan will not run until you manually start it. **Configure the schedule myself** means that the plan will run according to the customized schedule.

- **Schedule Settings** – The **Schedule Settings** field appears after clicking **Configure the schedule myself.** Configure the following settings to define your own schedule:
    - **Start time** – Specify a start time when the plan will run.
    - **Interval** – Define the running frequency of this plan by entering an integer in the textbox and select a time unit from the drop-down list.
    - **End Time** – Specify an end time for schedule by clicking the corresponding radio button. With **No end date** selected, the job will not stop unless you manually stop it; with **Enter after {0} occurrence(s)** selected, the job will stop when reaches the specified occurrence; with **End by {0}** selected, the job will stop at the specified time point.

6. Click **OK** to save this plan or click **OK and Run Now** to run this plan immediately.

Hold and Export Actions

To perform the hold and export action while saving a search plan, choose one of the following options:

- **Hold Action** – If you want to apply legal holds to all the searched documents/items, select the **Hold** checkbox. The **Apply Hold** field appears.
    i. Click **Browse** and then select the holds you want to apply in the pop-up **Browse Hold** window.
    ii. Click **Add New Hold** in the **Actions** group to create a new hold for application.
    iii. Click **OK** in the **Commit** group to apply the selected holds to specified documents/items.
- **Export Action** – If you want to export all the searched documents/items, select the **Export** checkbox and the **Export Options** field appears. Select an export format for the specified searched documents/items by selecting the **Concordance Load File** or **EDRM XML** option. Select a previously-created export location from the drop-down list or click **New Export Location** to create a new one. For more information about creating a new export location, refer to Configuring Export Location.

    ***Note**: Integrated with Concordance System, the exported search result can be managed by the Concordance platform.

Search Keyword Expressions

Refer to the following rules when entering keyword expressions into the search field:

- Multiple keywords are allowed, separated by spaces, **And**, **+**, or **Or.**
    - If you use spaces, "**And**", or "**+**" to separate the keywords as shown in the following example, the logical relationship between the keywords is **And**. The item/document name, hold name, or content meeting all the entered keywords will be searched (for example, **A B**, **A and B**, or **A +B**). The item/document

whose item/document name, hold name or content contains both **A** and **B** will be searched.

- If you use **Or** to separate the keywords, the logical relationship between the keywords is **Or.** When you use **OR** together with spaces, **And**, or **+**, put parentheses around the keywords separated by spaces, **And**, and **+**. The documents and items meeting any of the keywords will be searched (for example, **A or B**, **(A and B) or C**). The item/document whose item/document name, hold name or content contains either **A** or **B** will be searched; if you enter the keywords: **(A and B) or C**, the item/document whose item/document name, hold name, or content contains both **A** and **B**, or just contains **C** will be searched.

- You can enter an exact phrase to search the content of the item/document. The exact phrase must be enclosed in double quotation marks (for example, **test successful**). As the example shows, the item/document whose content contains **test successful** will be searched.

Advanced SharePoint Search Conditions

The **Advanced Search** enriches the search function by enabling users to select the search object level, choose whether to include held items, and use the metadata filter policy. To configure the advanced SharePoint Search settings, complete the following steps:

1. On the **Home** tab, click on the farm name in the Scope pane to expand the tree.
2. Select the tree nodes where you want to perform the SharePoint Search in the expanded tree.
3. Enter the keywords in the search textbox to the right.
4. Click **Advanced** in the search textbox. The **Advanced Search** field appears. Configure the following settings:
   - **SharePoint Type** – Select the search object level by checking the corresponding checkboxes. DocAve will search in the keywords in the selected object levels. By default, Document and Item level are selected. If you choose the **Document Version** or **Item Version** level, the item/document version crawling must be performed before searching. For details about item/document version crawling, refer to Document/Item Version Crawling.
   - **Hold Documents/Items** – Choose whether to include the held documents or items by clicking the corresponding radio button.
   - **Metadata Filter Policy** – Check the checkbox to enable the metadata filter policy search and the metadata filter rule configuration field appears. Click **Add a Criterion** to add a new rule and click ✕ to delete the specified rule.
5. **Rule** – Select the rule you want in the drop-down list.

***Note**: If you want to use the customized metadata as the metadata rule, you must map the column property first using **eDiscovery Mapping Tool**. For more details about using this tool, refer to DocAve 6 Supplementary Tools User Guide.

- **Condition** – Select the condition for the rule.
- **Value** – Enter a value you want the rule to match in the textbox.

6. To add more filters to the filter policy, repeat the previous step**.**

   ***Note**: Depending on the filters you set up, you can change the logical relationship between the filter rules. There are two logics currently: **And** and **Or**. By default, the logic is set to **And**. If the logic can be changed, it is done by clicking on the logic link.

   - **And** – The content which meets all the rules will be searched.
   - **Or** – The content which meets any one of the rules will be searched.

Performing Archiver Search

Archiver Search allows you to search any desired archived documents, items, and Newsfeed (posts and replies) among massive in real-time or on schedule. You can optionally choose to export the search results or apply legal hold to the search results. The section below instructs the steps to perform an Archiver Search.

***Note**: Ensure that the archived item/document/Newsfeed you want to search has full text index generated before performing an Archiver Search. For more information about Archiver full text index, refer to the DocAve 6 Archiver User Guide.

Performing a Real-Time Archiver Search

A Real-time Archiver Search is done immediately after configuration. You can apply legal holds or export the desired search results. To configure a real-time Archiver Search, complete the following steps:

1. On the **Home** tab, Click **Archiver Search** in the **View** group on the ribbon.
2. Click on the farm name in the **Scope** pane to expand the tree.
3. Select the tree nodes where you want to perform the Archiver search in the expanded tree.
4. Enter the keywords in the search textbox to the right. Wildcards are supported. Refer to Search Keyword Expressions for detailed information about the keyword expression.
5. If you want to use the Advanced Search, click **Advanced** in the textbox. The Advanced Search field appears. For more information, refer to Advanced SharePoint Search Conditions.
6. Click **Search** in the **Manage** group on the ribbon to search the documents and items according to the search keywords you entered.
7. All of the documents and items meeting the search conditions are displayed in the Search Result interface, under the **Search Result** tab. For more information, refer to Managing Search Results.
8. You can download the search results by clicking **Download Search Results** on the upper right-hand corner of the Search Results area. For more information, refer to Downloading Search Results.
9. To export the search results to an export location for further use, select the searched documents/items/Newsfeed that you want to export and click **Export** in the **Actions** group. The **Export Settings** window appears.
10. Select an export format for the selected search results, **Concordance Load File** or **EDRM XML**.
11. Select a previously-created export location from the drop-down list, or click **New Export Location** to create a new one. For more information about creating a new export location, refer to Configuring Export Location.

    ***Note**: Integrated with Concordance System, the exported content can be managed by the Concordance platform by default.

Performing a Scheduled Archiver Search

You can build an Archiver Search plan to search specific archived documents, items, and Newsfeed on a schedule. It allows you to export and apply legal holds to all of the search results in bulk. As long as there is a new document, item, or Newsfeed searched, it would be exported or held according to the action you take in the plan.

To build an Archiver search plan, complete the following steps:

1. On the **Home** tab, Click **Archiver Search** in the **View** group.
2. Click on the farm name in the **Scope** pane to expand the tree.
3. Select the tree nodes where you want to perform the Archiver Search in the expanded tree.
4. Enter the keywords in the search textbox to the right. Wildcards are supported. Refer to Search Keyword Expressions for the detailed information about the keyword expression.
5. If you want to use the Advanced Search, click **Advanced** in the textbox. The **Advanced Search** field appears. For more information, refer to Advanced Archiver Search Conditions.
6. Refer to **step 3** in the Performing a Scheduled SharePoint Search to build an Archiver search plan.

Advanced Archiver Search Conditions

The **Advanced Search** enriches the search function by enabling users to select the search object level, choose whether to include held items, and use the metadata filter policy. To configure the advanced SharePoint Search settings, complete the following steps:

1. On the **Home** tab, Click **Archiver Search** in the **View** group on the ribbon.
2. Click on the farm name in the **Scope** pane to expand the tree.
3. Select the tree nodes where you want to perform the SharePoint Search in the expanded tree.
4. Enter the keywords in the search textbox to the right.
5. Click **Advanced** in the search textbox. The Advanced Search field appears. Configure the following settings:
    - Click **Add a Filter Level Group** to add a filter rule. The **File Filter Rule** configuration field appears.
    - Select a filter rule you want to use from the **Rule** drop-down list. The following four rules are available: Document, Document Version, Item, and Item Version.
    - Click next to the **Rule** drop-down list to expand the filter rule. Click **Add a criterion** to add a criteria for the specified filter rule, and click to delete the specified rule.

***Note**: Depending on the filters you set up, you can change the logical relationship between the filter rules. There are two logics currently: **And** and **Or**. By default, the logic is set to **And**. If the logic can be changed, it is done by clicking on the logic link.

- **And** – The content which meets all the rules will be searched.
- **Or** – The content which meets any one of the rules will be searched.

Downloading Search Results

The search results of both SharePoint Search and Archiver Search can be downloaded. To download the search results, complete the following steps:

1. In the **Search Results** tab, select the searched documents/items that you want to download.

   ***Note**: For the scheduled search jobs, go to the Job Monitor. Select a scheduled search job, and then click **Search Result** on the ribbon. The **Search Results** tab of the scheduled search job appears.

2. Click **Download Search Results**. The **Download Search Results** pop-up window appears.
3. Configure the following settings:
   - **Format Selection** – Select the format for the search result that will be downloaded. You currently have the option to set the format as **CSV** currently.
   - **Column Selection** – Select the columns for the search results.
     - **Current columns** – The current columns listed on the Search Results area will be downloaded.
     - **All columns** – All of the available columns for the search results will be downloaded.
4. Click **OK** to start the download job.
5. Click **Job Monitor**.
6. Select the download job, and then click **Download Search Results** on the ribbon.
7. Select a storage location for the search results and click **Save**. The search results are located in the specified location. The default name for the downloaded search results is **eDiscoverySearchResults_DateTime.zip**.

Hold Manager

Hold Manager in eDiscovery provides the capability to apply holds or release holds in batch. Through Hold Manager you can also synchronize the holds that are applied in SharePoint to DocAve for further management. The section below details how to create a new hold without leaving the DocAve interface and synchronize holds in SharePoint to DocAve.

On the **Hold Manager** tab, select a farm under the Hold Manager ribbon. All the holds and the general information under the selected farm are listed in the table. It is recommended that you synchronize the holds of the selected farm to DocAve before managing holds. For more information, refer to Synchronizing Holds to DocAve.

If the hold is synchronized from SharePoint to DocAve, the location of the hold in SharePoint is displayed under the **Location** column. A is added ahead of the checkbox next to the hold name to indicate that this hold is synchronized form SharePoint. Click to expand the hold. You will see the corresponding location of the item/document that is held by this hold.

To further manage holds, use the following tools in the **Hold Manager** interface:

- **Add a New Hold** – Add a new hold for the selected farm. Click **Add New Hold** in the **Manage** group on the ribbon.
- **View Details** – Select an existing hold and click **View Details** in the **Manage** group on the ribbon to view the detailed information about the hold. For more details, refer to Viewing Detailed Information of a Hold.
- **Edit** – Select an existing hold and click **Edit** in the **Manage** group on the ribbon.

  ***Note**: If the hold that is synchronized from SharePoint is applied to an item/document, this kind of hold is not editable.
- **Delete** – Select one or more existing holds, and click **Delete** in the **Manage** group on the ribbon to delete the selected holds.

  ***Note**: If the hold that you want to delete currently holds one or more item/document, it cannot be deleted unless you release the hold from the all the held items/documents.
- **Synchronize** – Synchronize the holds that are applied in SharePoint to DocAve. For more information, refer to Synchronizing Holds to DocAve.

Creating a New Hold

To create a new hold, complete the following steps:

1. On the **Home** tab, click the **Hold Manager** tab to reach the Hold Manager interface.

2. On the **Hold Manager** tab, select a farm from the drop-down list under the **Hold Manager** ribbon where you want to create the hold. The **Add New Hold** feature is activated after selecting a farm.
3. On the **Hold Manager** tab, click **Add New Hold.** The Add New Hold interface appears. Configure the following settings:
    - **Hold Name** – Enter a name for the hold you are creating and add an optional description for this hold.
    - **Managed By** – Enter the name of the users or groups who can manage this hold.

      Click to verify whether the username or group name you entered is valid. Alternatively, you can click to search for the desired user. In the pop-up window, enter the value in the **Find** textbox, and click to search the users. Select the desired users, and then click **Add**. Click **OK** to add the users, or click **Cancel** to close the window without adding the users.
    - Click **OK** in the **Commit** group on the ribbon to save your configurations.

Viewing Detailed Information of a Hold

To view the detailed information of an existing hold, complete the following steps:

1. Select an existing hold from the table in the workspace under the **Hold Manager** page.
2. Click **View Details** in the **Manage** group. The View Details interface appears with the following two fields:
    - **Hold Details** – Displays the hold detailed information including the Hold Name, Description, Managed By, and Last Modified Time. If the hold is not synchronized to DocAve, the **Edit Hold** is activated in the **Manage Group**. Click **Edit Hold** to edit it.
    - **Documents/Items Held By {0}** – Displays all the documents and items that are held by the selected hold and the general information about the item/document including the Document/Item Name, Type, Version, etc.

Applying a Legal Hold

You can apply one or more legal holds for the selected documents/items. To apply a legal hold, complete the following steps:

1. Select one or more documents/items in the **Documents/Items Held By {0}** field where you want to apply the legal holds.
2. Click **Apply Legal Hold** in the **Hold Actions** group. The Apply Legal Hold window appears.
3. Select one or more exiting holds under the **Apply Legal Hold** tab, or create a new hold for applying by clicking **Add New Hold** in the **Action** group on the ribbon. The Add New Hold interface appears. For more information, refer to Creating a New Hold.
4. Click **Apply** in the **Commit** group on the ribbon to apply the selected holds to the specified documents/items.

Releasing a Hold

To release the applied hold for the selected documents/items, complete the following steps:

1. Select one or more documents/items in the **Documents/Items Held By {0}** field where you want to release the legal holds.
2. Click **Release Hold** in the **Hold Actions** group on the ribbon. The Release Hold window appears.
3. All the holds that are applied to the selected documents/items are displayed. Select one or more hold that you want to release.
4. Click **Release** in the **Commit** group to release the selected holds from the specified documents or items.

Exporting a Hold

To export the selected held documents/items to an export location, complete the following steps:

***Note**: Integrated with Concordance System, the exported content can be managed by the Concordance platform by default.

1. Select one or more held documents/items that you want to export.
2. Click **Export** in the **Manage** group on the ribbon. The Export Settings window appears.
3. Select a previously-created export location from the drop-down list in the pop-up window, or click **New Export Location** to create a new one. For more information, refer to Configuring Export Location.

Synchronizing Holds to DocAve

To synchronize holds in SharePoint to DocAve for further management, complete the following steps:

1. On the **Home** tab, click the **Hold Manager** tab to enter the Hold Manager interface.
2. Click **Sync Configuration** on the **Hold Manager** tab. The Sync Configuration interface appears. All the available farms are listed in the workspace under the **Sync Configuration** tab. Select one or more existing farms. The holds in the selected farms will be synchronized to DocAve.
3. Choose one of the following options in the **Schedule Configuration** group:
    - Click **Sync** to synchronize the holds in the specified farms to DocAve. A window appears after clicking **Sync Now**. Select a synchronization type in the window. For more details, refer to Synchronization Type.
    - Click **Configure Schedule** to synchronize the holds in the specified farm on a customized schedule. Configure the following settings in the pop-up window:
        - **Sync Type** – Select a synchronization type. For more details, refer to Synchronization Type.
        - **Schedule** – Select a schedule type. **No schedule** means that the synchronization job will not run until you manually start it. **Configure the schedule myself** means that the synchronization job will run according to the customized schedule.
        - **Schedule Settings** – The **Schedule Setting**s field appears after clicking **Configure the schedule myself.** Configure the following settings to define your own schedule:
            - **Start time** – Specify a start time when the synchronization job will run.
            - **Interval** – Define the running frequency of this plan by entering an integer in the textbox and select a time unite from the drop-down list.
            - **End Time** – Specify an end time for schedule by clicking the corresponding radio button. With **No end date** selected, the synchronization job will not stop unless you manually stop it; with **Enter after {0} occurrence(s)** selected, the synchronization job will stop when reaches the specified occurrence; with **End by {0}** selected, the sync job will stop at the specified time point.
4. Click **OK** to save the synchronization schedule, or click **OK and Run Now** to run the synchronization job immediately.
5. You can click **Refresh** in the **Refresh** group on the ribbon to update the synchronization information for the listed farms.

Synchronization Type

The **Full** synchronization type synchronizes all the holds under the specified farms to DocAve. The **Incremental** synchronization type only synchronizes the newly added holds, including the holds that have been changed since the last synchronization job to DocAve.

***Note**: If it is the first time to run an incremental hold synchronization job for the selected farms, a full synchronization job will run by default.

Plan Manager

Plan Manager in eDiscovery provides the capability to manage the eDiscovery plans. After launching eDiscovery, click **Plan Manager** next to the **Home** tab. In the **Plan Manager** interface, any plans that you have previously created are displayed in the main display pane.

In this interface, you can change the number of plans displayed per page. To change the number of plans displayed per page, select the desired number from the **Show rows** drop-down menu in the lower right-hand corner. To sort the plans, click the column heading such as **Plan Name**, and **Farm**.

Select plans and perform the following actions in the **Plan Manager** interface by clicking the corresponding button on the ribbon:

- **View Details** – Display the selected nodes and plan settings in the **View Details** tab. When you want to change the nodes you selected or want to modify the plan settings, click **Edit** on the ribbon.
- **Edit** – Change the selected node or plan settings for the selected plan. You can change the nodes you selected and modify the plan settings. Click **Save** and select the **Save** option from the drop-down menu to save the plan, or click **Save** and select the **Save and Run Now** from the drop-down menu to run the job of the newly configured plan.
- **Delete** – Delete the selected plans. A confirmation window appears, confirming that you want to proceed with the deletion. Click **OK** to delete the selected plans, or click **Cancel** to return to the **Plan Manager** interface without deleting the selected plans.
- **Run Now** – Run the job of the selected plan.

eDiscovery Tool

DocAve eDiscovery provides a tool named **AgentToolSP2010eDiscoveryMapping** for SharePoint 2010 farms and a tool named **AgentToolSP2013eDiscoveryMapping** for SharePoint 2013 farms. These two tools allow you to configure crawl property mappings for the specified column. Once the property mapping is configured, the customized metadata filter rule in the advanced SharePoint search conditions is able to use. Refer to the DocAve 6 Supplementary Tools User Guide for instructions on using these tools.

Appendix A: Examples of Filter Policies in SharePoint Advanced Search

The table below lists examples of filter rules configured in SharePoint advanced search.

Rule	Condition	Value	Result
URL	Contains	test	The item/document whose URL contains **test** will be searched.
	Does Not Contain	test	The item/document whose URL does not contain **test** will be searched.
	Equals	http://webapp:20000/sites/test/SharedDocument/training	The document/list whose URL is the same as the entered URL will be searched.
	Does Not Equal	http://webapp:20000/sites/test/SharedDocument/training	The document/list whose URL is not the same as the entered URL will be searched.
Name	Contains	test	The item/document whose name contains **test** will be searched.
	Does Not Contain	test	The item/document whose name does not contain **test** will be searched.
	Equals	test	The item/document whose name is **test** will be searched.
	Does Not Equal	test	The item/document whose name is not **test** will be searched.
Size	>=	1MB	The item/document whose size is not smaller than 1MB will be searched. For example, a 2MB document will be searched.
	<=	1MB	The item/document whose size is not bigger than 1MB will be searched. For example, a 500kB document will be searched.
Created Time	Before	2012-08-06 12:15:50	The item/document which is modified before **2012-08-06 12:15:50** will be searched.
	After	2012-08-06 12:15:50	The item/document which is modified after **2012-08-06 12:15:50** will be searched.
	On	2012-08-06 12:15:50	The item/document which is modified on **2012-08-06 12:15:50** will be searched.
	Within	5 Days	The item/document which is modified in last **5 days** will be searched.

Rule	Condition		Value	Result
	Older Than		5 Days	The item/document which is modified **5 days** ago will be searched.
Last Modified Time	Before		2012-08-06 12:15:50	The item/document which is modified before **12:15:50 08/06/2012** will be searched.
	After		2012-08-06 12:15:50	The item/document which is modified after **12:15:50 08/06/2012** will be searched.
	On		2012-08-06 12:15:50	The item/document which is modified on **12:15:50 08/06/2012** will be searched.
	Within		5 Days	The item/document which is modified in last **5 days** will be searched.
	Older Than		5 Days	The item/document which is modified **5 days** ago will be searched.
Created By	Contains		test\user	The item/document whose creators contain **test\user** will be searched.
	Does Not Contain		test\user	The item/document whose creators do not contain **test\user** will be searched.
	Equals		test\user	The item/document whose creator is **test\user** will be searched.
	Does Not Equal		test\user	The item/document whose creator is not **test\user** will be searched.
Last Modified By	Contains		test\user	The item/document whose last modifiers contain **test\user** will be searched.
	Does Not Contain		test\user	The item/document whose last modifiers do not contain **test\user** will be searched.
	Equals		test\user	The item/document whose last modifier is **test\user** will be searched.
	Does Not Equal		test\user	The item/document whose last modifier is not **test\user** will be searched.
Content Type	Equals		Task	The item/document whose content type is **Task** will be searched.
	Does Not Equal		Task	The item/document whose content type is not **Task** will be searched.
Column: Text	Text	Contains	test	The item/document whose **Text** column value contains **test** will be searched.
		Does Not Contain	test	The item/document whose **Text** column value does not contain **test** will be searched.

Rule	Condition		Value	Result
		Equals	test	The item/document whose **Text** column value is **test** will be searched.
		Does Not Equal	test	The item/document whose **Text** column value is not **test** will be searched.
Column: Yes/No	Choice	Equals	Yes	The item/document whose **Choice** column value is **Yes** will be searched.
		Does Not Equal	Yes	The item/document whose **Choice** column value is not **Yes** will be searched.
Column: Date and Time	Date	Before	2012-08-06 12:15:50	The item/document whose **Date** column value is before **2012-08-06 12:15:50** will be searched.
		After	2012-08-06 12:15:50	The item/document whose **Data** column value is after **2012-08-06 12:15:50** will be searched.
		On	2012-08-06 12:15:50	The item/document whose **Data** column value is **2012-08-06 12:15:50** will be searched.
		Within	5 Days	The item/document whose **Data** column value is in last **5 days** will be searched.
		Older Than	5 Days	The item/document whose **Data** column value is **5 days** ago will be searched.
Column: Number	Number	>=	5	The item/document whose **Number** column value is not smaller than **5** will be searched. For example, **8** will be searched.
		<=	5	The item whose *Number* column value is not bigger than **5** will be searched. For example, **2** will be searched.
		=	5	The item whose **Number** column value is **5** will be searched.
File Format	Equals		Word Document (.doc)	The file whose file format is **Word Document (.doc)** will be searched. For example, **Test.doc** will be searched.
	Does Not Equal		Word Document (.doc)	The file whose file format is not **Word Document (.doc)** will be searched. For example, **Test.txt** will be searched.

Appendix B: Examples of Filter Policies in Archiver Advanced Search

The table below lists the examples of the filter rules configured in the Archiver advanced search.

***Note**: The document and the item filter rule is same as the filter rule of SharePoint advanced search. Refer to Appendix A: Examples of Filter Policies in SharePoint Advanced Search to see the examples of the filter policies when the filter rule is **Document** or **Item**.

Rule		Condition	Value	Result
Document Version	Title	Contains	Test	The archived document whose version title contains **test** will be searched. For example, **test(1).doc** will be searched.
		Does Not Contain	Test	The archived document whose version title does not contain *test* will be searched. For example, **test(1).doc** will be searched.
		Equals	Test	The archived document whose version title is **test** will be searched. For example, **test(1).doc** will be searched.
		Does Not Equal	Test	The archived document whose version title is not **test** will be searched. For example, **test(1).doc** will be searched.
		Match	te*t.docx	The archived document whose version title begins with **te** and ends with **t.docx** will be searched. For example, **test.docx** will be searched.
			te?t.docx	The archived document whose version title is the same as **te?t** except for the character **?** will be searched. For example, **teAt.docx** will be searched.
		Does Not Match	te*t.docx	All the archived documents except those whose version titles begin with **te** and end with **t.docx** will be searched. For example, **DocAve.txt** will be searched.
			te?t.docx	All the archived documents except those whose version titles are the same as **te?t.docx** except for the character **?** will be searched. For example, **DocAve.txt** will be searched.
	Size	>=	1MB	The archived document whose size is not smaller than 1MB will be searched. For example, a 2MB document will be searched.

Rule		Condition	Value	Result
		<=	1MB	The archived document whose size is not bigger than 1 MB will be searched. For example, a 500kB document will be searched.
	Modified Time	On	2012-08-06 12:15:50	The archived document which is modified on **12:15:50 08/06/2012** will be searched.
		Within	5 Days	The archived document which is modified in last **5 days** will be searched.
		Older Than	5 Days	The archived document which is modified **5 days ago** will be searched.
	Modified By	Contains	test\user	The archived document whose modifiers contain **test\user** will be searched.
		Does Not Contain	test\user	The archived document whose modifiers do not contain **test\user** will be searched.
		Equals	test\user	The archived document whose modifier is **test\user** will be searched.
		Does Not Equal	test\user	The archived document whose modifier is not **test\user** will be searched.
	File Format	Equals	Word Document (.doc)	The file whose file format is **Word Document (.doc)** will be searched. For example, Test.doc will be searched.
		Does Not Equal	Word Document (.doc)	The file whose file format is not **Word Document (.doc)** will be searched. For example, **Test.txt** will be searched.
	Archived Time	Before	2012-08-06 12:15:50	The item/document whose archived time is before **12:15:50 08/06/2012** will be searched.
Item Version	Title	Contains	Test	The archived item whose version title contains *test* will be searched. For example, **test(1).doc** will be searched.
		Does Not Contain	Test	The archived item whose version title does not contain *test* will be searched. For example, **test(1).doc** will be searched.
		Equals	Test	The archived item whose version title is **test** will be searched. For example, **test(1).doc** will be searched.
		Does Not Equal	Test	The archived item whose version title is not **test** will be searched. For example, **test(1).doc** will be searched.
		Match	te*t.docx	The archived item whose version title begins with **te** and ends with **t.docx** will be searched. For example, **test.docx** will be searched.

Rule		Condition	Value	Result
			te?t.docx	The archived item whose version title is the same as **te?t** except character **?** will be searched. For example, **teAt.docx** will be searched.
		Does Not Match	te*t.docx	All the archived items except those whose version titles begin with **te** and end with **t.docx** will be searched. For example, **DocAve.txt** will be searched.
			te?t.docx	All the archived items except those whose version titles are the same as **te?t.docx** except character **?** will be searched. For example, **DocAve.txt** will be searched.
	Modified Time	Before	2012-08-06 12:15:50	The archived item which is modified before *12:15:50 08/06/2012* will be searched.
		After	2012-08-06 12:15:50	The archived item which is modified after **12:15:50 08/06/2012** will be searched.
		On	2012-08-06 12:15:50	The archived item which is modified on **12:15:50 08/06/2012** will be searched.
		Within	5 Days	The archived item which is modified in last **5 days** will be searched.
		Older Than	5 Days	The archived document which is modified **5 days ago** will be searched.
	Modified By	Contains	test\user	The archived item whose modifiers contain **test\user** will be searched.
		Does Not Contain	test\user	The archived item whose modifiers do not contain **test\user** will be searched.
		Equals	test\user	The archived item whose modifier is **test\user** will be searched.
		Does Not Equal	test\user	The archived item whose modifier is not **test\user** will be searched.
	Archived Time	Before	2012-08-06 12:15:50	The archived item whose archived time is before **12:15:50 08/06/2012** will be searched.

Appendix C: Accessing Hot Key Mode

In order to work faster and improve your productivity, DocAve supports hot key mode for you to perform corresponding actions quickly by only using your keyboard. To access hot key mode from the eDiscovery interface, press the key combination of **Ctrl** +**Alt** + **Z** (simultaneously) on the keyboard.

The following table provides a list of hot keys at the top level. Each time you want to go back to the top level after accessing the interface at a lower level, press **Ctrl** +**Alt** + **Z** on the keyboard. For example, continue pressing **H** to jump to the Vault **Home** page.

Operation Interface	Hot Key
eDiscovery Home Page	H
DocAve Home Page	1
DocAve Online Community	2
Control Panel	3
Job Monitor	4
Plan Group	5
Health Analyzer	6
Account Information	9
Help and About	0

eDiscovery Home Page

To access the Home page using hot keys in the eDiscovery interface, press the **Ctrl** +**Alt** + **Z** key combination to access the hot key mode, and then press **H** on the keyboard to jump to the **Home** page.

The following table provides a list of hot keys for the functionalities on the ribbon of the home page. For example, continue pressing **P** to jump to the **SharePoint Search** interface.

Functionality Name and Hot Key	
SharePoint Search	P
Archiver Search	A
Version Crawling	V
Location Settings	L
Compliance Configuration	C
Start New Search	N
Search	SH
Save As a Plan	SA
Job Monitor	J

Version Crawling

Functionality Name and Hot Key							
Enable	E						
Disable	D						
Configure Content Source	S	Create	CR	OK	O		
				Cancel	C		
		View Details	V	Edit	E	OK	O
						Cancel	C
				Cancel	C		
		Edit	E	OK	O		
				Cancel	C		
		Delete	D				
		Crawling Schedule	CS	OK	O		
				Cancel	C		
		Start	ST	Start Full Crawl	SF		
				Start Incremental Crawl	SI		
		Refresh	R				
		Close	CL				
Close	C						

Compliance Configuration

Functionality Name and Hot Key			
Configure Database	D	OK	O
		Cancel	C
Configure Logical Device	L	OK	O
		Cancel	C
Close	C		

Location Settings

Functionality Name and Hot Key					
Export Location	EL	Create	N	OK	O
				Cancel	C
		View Details	V	Edit	E
				Close	C
		Edit	ED	OK	O
				Cancel	C
		Delete	D		
Search Result Location	R	Save	S		
		Close	C		
Close	C				

Hold Manager

Functionality Name and Hot Key					
Add New Hold	A	OK	O		
		Cancel	C		
View Details	V	Apply Legal Hold	A		
		Release Hold	R	Release	R
				Cancel	C
		Export	P	Export	E
				Cancel	C
		Edit Hold	E		
		Job Monitor	J		
		Close	C		
Edit	E	OK	O		
		Cancel	C		
Delete	D				
Sync Configuration	S	Configure Schedule	CS	OK	O
				Cancel	C
		Sync Now	S	OK	O
				Cancel	C
		Refresh	R		
		Job Monitor	J		
		Close	CL		
Refresh	R				

Plan Manager

Functionality Name and Hot Key					
View Details	V	Edit	E	Save	S
				Cancel	C
		Cancel	C		

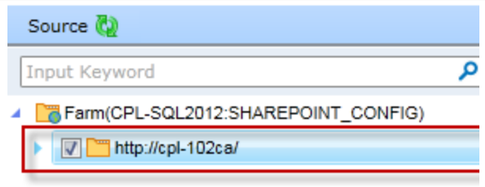
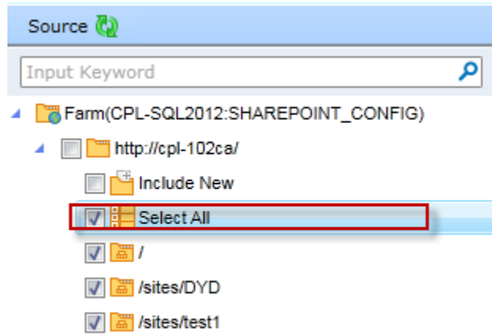
Functionality Name and Hot Key					
Edit	E	Save	S	Save	SA
				Save and Run Now	SR
		Cancel	C		
Delete	D				
Run Now	R				

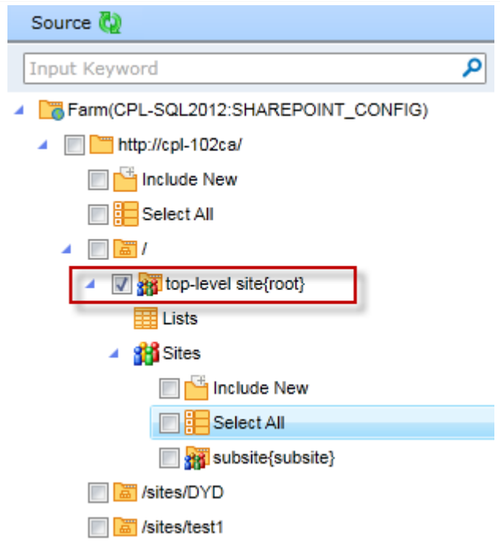
Search Results

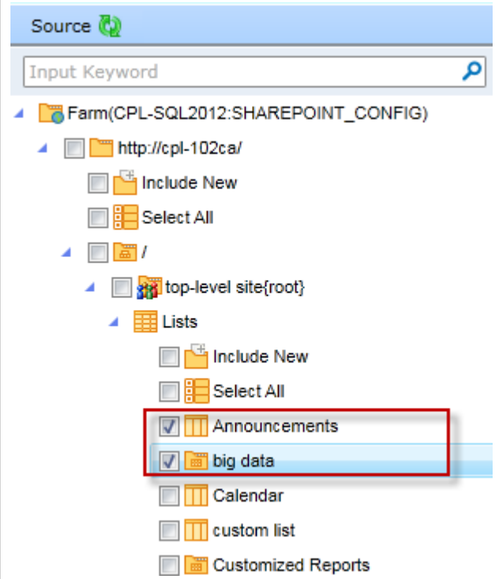
Functionality Name and Hot Key					
Apply Legal Hold	A	Apply	A		
		Cancel	C		
		Add New Hold	N	OK	O
				Cancel	C
Export	E	Export	E		
		Cancel	C		
Search	SH				
Job Monitor	J				
Save As a Plan	SA	OK	O	Save	SA
				Save and Run Now	SR
		Cancel	C		
Close	C				

Appendix D: Customization Table

The following table provides available customizations for eDiscovery. A √ means that the corresponding SharePoint object level is supported by SharePoint Search or Archiver Search.

Search Mode\ What to search	SharePoint Search	Archiver Search	Note	What to Select When Searching
Web application	√	√		
Site collection	√	√		

Search Mode\ What to search	SharePoint Search	Archiver Search	Note	What to Select When Searching
Site	√			

Search Mode\ What to search	SharePoint Search	Archiver Search	Note	What to Select When Searching
List	√			

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