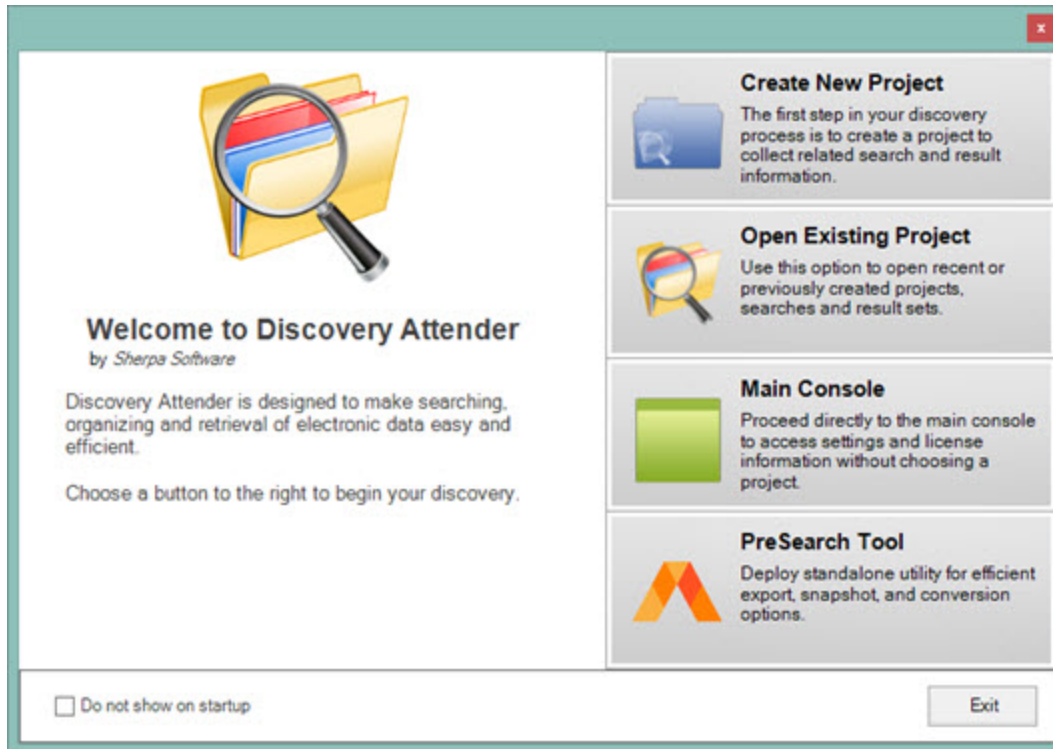


Welcome

Sherpa Software's *Discovery Attender* is a software tool designed to automate the search and collection of electronically stored information across a variety of platforms. This dynamic solution sits behind the firewall and enables in-house talent to identify and gather responsive information in a timely, defensible manner.



The *Discovery Attender* interface is designed to be intuitive and user friendly. The [Welcome Screen](#) (above) serves as the gateway to the product. From here you can directly open the [PreSearch Tool](#) or [create a project](#). A project serves as a repository for a collection - related searches and associated result sets. Once a new project is created, the [MAIN CONSOLE](#) acts as the central hub to allow you to control the creation, processing, and organization of searches. From here, you can access a [Search Wizard](#) which guides you through the step-by-step process of creating a new search. The *MAIN CONSOLE* also provides access to the [Result Management](#) features to view, organize, export and report on the messages, attachments and files that are found during your custom searches.

Where to Begin

To effectively filter and produce data with *Discovery Attender*, you must first [create a project](#) . Once a project is created, follow the steps below to begin the process:

Step	Action	Description
1	Create and Run A Search	A setup wizard leads you through the process of selecting locations and criteria to include in your search. Once started, the chosen data stores are scanned to find items (called results) that match

		the selected criteria. Information and metadata from these results are stored in the search databases.
2	Manage Results	<p>After the search is complete, you have a variety of options to view and organize your results including:</p> <ul style="list-style-type: none"> • Review • Filter • Deduplication • Annotation • Labels • Marks • and more
3	Export Results	<p><i>Discovery Attender</i> provides a number of settings for exporting selected results to your chosen format.</p> <p>After the results have been exported, you may find it useful to generate reports to document the chain of custody or audit trail for your searches.</p>

Sections

Please navigate to the following sections to find further detail about key topics.

- [Installation Guide](#)
- [System Requirements](#)
- [Main Console](#)
- [Search Wizard](#)
- [Result Management](#)
- [Result Actions](#)
- [Settings](#)
- [Supported File Formats](#)
- [PreSearch Tool](#)
- [Best Practices](#)
- [Glossary](#)
- [Contact Information](#)

Searchable Data Stores

- Microsoft Exchange (including Mailboxes, Public Folders and Online Archives)
- Outlook Personal Folders (PST files)
- Office 365 and other EWS data stores
- MBOX files
- Lotus Notes NSF mail files
- Microsoft SharePoint

- [Files](#) stored in network and local file shares
- MSG or EML formatted email stored in network and local file shares
- Archives created by Sherpa Software's *Archive Attender*

Questions

Please contact our [technical support](#) team with any questions.

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Installation Guide

The following are general steps to install *Discovery Attender*. For more detailed information, please see the **Getting Started** guide.

Prerequisites for Discovery Attender 4.0

- Version 4.0 of *Discovery Attender* requires the .Net 4.5 framework to be present on the installation machine before setup has begun. If this framework is not present, the installer cannot continue.
- If you are searching any Microsoft Exchange based mail store (mailboxes, public folders, online archives, PST files, MSG file paths, EWS (Office 365), Archive Attender archives), **Microsoft Outlook** version 2003 or above must be installed and run once with at least one profile. Outlook is not completely configured until the first profile has been created.

If you are searching Exchange 2013, you must have an **Microsoft Outlook** client version 2010 or above installed and a Master MAPI Profile created to an administrator account.

- If you are searching NSF files, a Lotus Notes client version 8.5.1 or above must be installed.
- If you are searching SharePoint, the *Discovery Attender for SharePoint* component (licensed

separately) must be installed on a server within the SharePoint farm you wish to search.

- *Discovery Attender* requires local administrator rights to the computer where it is installed.

Please note:

- If you are running *Discovery Attender* on a computer with UAC settings enabled (**Windows Vista, Windows 7 or Windows Server 2008 or above**) you will be prompted each time you run the program.
- **Do not install Discovery Attender directly on a production Exchange server.** If you install it on a backup Exchange server, please be aware that some PST functionality may not work properly.

New Installation

1. Choose the server or computer where you wish to install *Discovery Attender*.
2. Verify that the prerequisites (see above) are installed and configured
3. Double-Click the appropriate setup file (e.g. DA_Setup.exe) to begin the installation of *DISCOVERY ATTENDER*. The InstallShield™ wizard will automatically launch the setup wizard.
4. Follow the screens as prompted. You must accept the *LICENSE AGREEMENT* to continue with the installation.
5. Select the *Discovery Attender* features to install. The *Sherpa PreSearch Tool* is an optional, but recommended, component.
6. Select the location to which you wish to install *Discovery Attender*. In addition to the program files, this path stores log files and a temporary directory. **Verify the login account has read/write permission to this location.**
7. You will be prompted to install a specific C++ runtime libraries. Please follow the prompts and accept the license agreement. If you have an older version of the C++ runtime libraries installed, you may be prompted to upgrade and reboot.
8. *Discovery Attender* will be installed with a new program group created in your Start Menu. At any time you can go to *Start | Programs |Discovery Attender |Start Discovery Attender* to begin.
9. At the conclusion of the installation, you will have an option to launch *Discovery Attender*. Select the checkbox and click '*Finish*' to launch the application.
10. Upon startup, you will be prompted for your [license key](#) (does not apply for evaluation versions).
11. The [Welcome Screen](#) will appear guiding you through the options for creating a new project.

Existing Installation

- *Discovery Attender* 4.0 will update all previous versions of the product from version 2.0 and above. It should not, however, be installed side by side with an older version of the product.
- If you have a 2.x or 3.x version installed, please use the **Upgrade** option after clicking on the appropriate setup file (e.g. DA_Setup.exe).
- Older projects created in V2.x and above will not be overwritten; however, they will be upgraded when opened in Version 4.0 to match the new format.

- If you are using the 'Search Again' option on a search first created in an earlier version, please make sure you check the wizard options carefully. Many options that are available in newer versions of *Discovery Attender* did not exist in older versions, or existed in a different format which may not have translated to your specifications.
- Please [contact](#) Sherpa Software technical support if you have any questions or issues.

Note: *Discovery Attender* Versions 2.x and above, including Version 4.0, are not compatible with older 1.x versions. 1.x versions can be installed side by side with 2.x, 3.x and above, including *Discovery Attender* 4.0.

Un-Installing Discovery Attender

To un-install *Discovery Attender*, open the Control Panel, choose *Add/Remove Programs* or *Programs and Features* (depending on your operating system), and select ***Discovery Attender*** from the list.

All information stored in the default application directory, including any projects data located in those directories, will be deleted.

See Also

[Installing the SharePoint Component](#)

Installing the SharePoint Component

The following are general steps to installing the *Discovery Attender for SharePoint* component. For more detailed information, please see the **Getting Started** guide.

The SharePoint component runs as a service on a server that is a member of the SharePoint farm containing the sites that need to be searched. It can be installed on and search SharePoint 2007 or SharePoint 2010 servers.

Since the processing of files is done through the service installed on the SharePoint server, the machine where this service component is installed should have sufficient bandwidth, CPU, hard drive space and memory to conduct file searches.

Full permission to the sites included in the searches is required for the SharePoint component to run effectively. You may need to contact your SharePoint administrator with any questions on creating an account with proper access to the specified SharePoint farms.

In addition to the *Discovery Attender for SharePoint* component, the .Net 3.5 framework with Service Pack 1 must also be installed on the server.

Installation

1. Choose the server or computer where you wish to install the *Discovery Attender for SharePoint* component.
2. Double-click the DASP_Setup.exe file to begin. The InstallShield™ wizard should automatically

launch the setup.

3. Follow the screens as prompted. You must accept the License Agreement to continue with the installation.
4. Select the SharePoint component for installation.
5. Choose the destination folder. The setup will begin, installing the required components in the chosen directory.
6. Upon completion of the setup, the configuration wizard will launch. In order to complete this section, you will need to know the name and password under whose authority the service will run.
7. Be sure to save the **Universal Resource Indicator**, or URI, for the SharePoint server or servers you wish to search. Enter the account credentials and URI. If you are unsure about the URI settings, just leave the defaults.
8. Once the URI details are entered, setup is complete. Click the **FINISH** button.
9. The *Discovery Attender for SharePoint* component is licensed separately from the main *Discovery Attender* application. Within *Discovery Attender*, you will need to enter the SharePoint component [license key](#) and configure basic settings as described in the [SharePoint Settings](#).

Uninstalling the SharePoint component

To uninstall the *Discovery Attender SharePoint* component, use the *Programs and Features* options from the Control Panel of the SharePoint server. Select '**Remove**' from the options and the setup utility will stop the service and uninstall all the components.

See Also

- [Searching SharePoint](#)
- [SharePoint Settings](#)
- [Installation Guide](#)

System Requirements

Discovery Attender runs as a stand alone application on your desktop, laptop or server. The more RAM and CPU power a computer possesses, the faster *Discovery Attender* will run. The following are the minimum requirements.

- Windows 8.1 or higher, Windows 2008 Server, SP 2 or Higher
- MINIMUM: 2 GHz or higher CPU (significantly more is recommended)

For significantly better performance, please use 2x or 4x the minimum amount of processing power recommended above

- 4 gigabytes of RAM or higher (4 gigabytes or higher recommended)

- Outlook 2010 or Higher installed and configured with a profile (if searching mailboxes, online archives, PST files, or other Microsoft Exchange based data stores)
- Lotus Notes Client 8.5.1 or higher (if searching Lotus Notes NSF files)
- Approximately 100 MB free Hard Drive space for the installation. **Additional** Hard Drive space will be required as projects, searches and (optional) indexes are created. We recommend at least 20 GB per active project, and more if caching is used.
- **Local administrator rights** are required to run Discovery Attender.

Please Note:

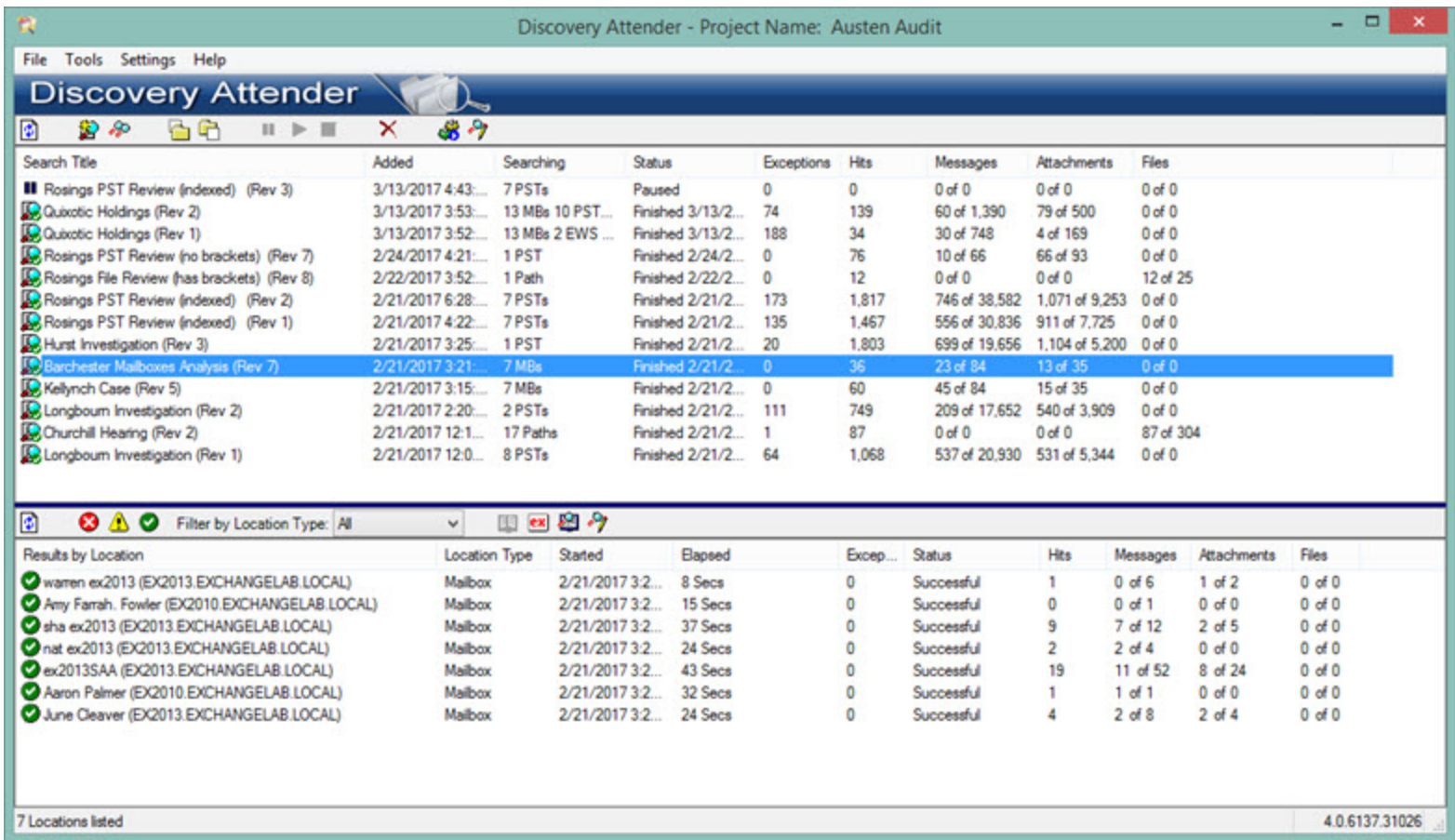
- Microsoft .Net 4.6 framework is required. The framework can be [downloaded](#) from the Microsoft web site.
- If you are running *Discovery Attender* on a machine with UAC settings enabled, you must select the "Run this program as administrator" privilege level under *Properties | Compatibility*.
- The login account that *Discovery Attender* is running under requires local administrator rights to the computer where the application is installed.
- The above requirements are the minimum needed for running the product. However, to improve the performance of *Discovery Attender*, increase the CPU and the memory.
- If you wish to run the 64-bit version of *Discovery Attender*, the version of Microsoft Outlook or Office must also be 64-bit.

See Also

- [Installation Guide](#)

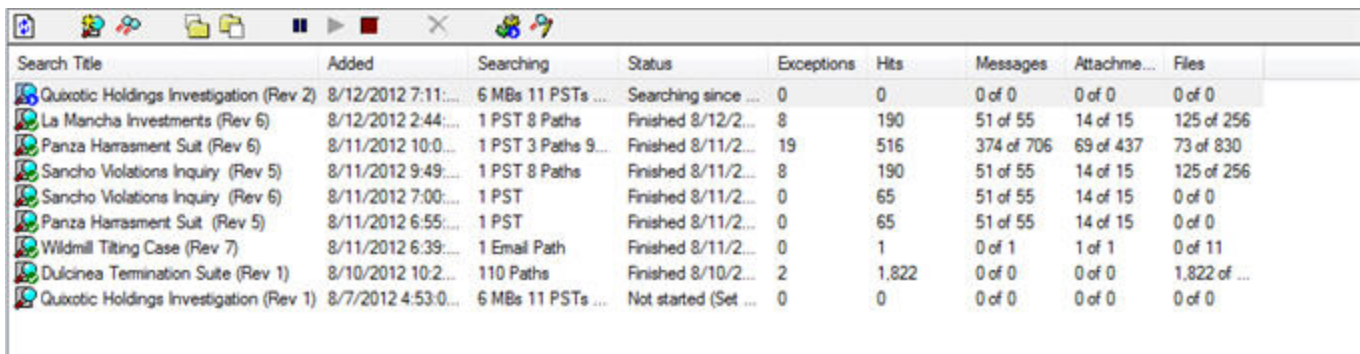
Main Console

The main console allows you to create and manage your searches. It contains a summary of your searches and serves as the gateway for most *Discovery Attender* functionality. You can manage searches, modify existing searches (search again), view statistics, set application options, view summaries, access the result set and more.



The main console is divided into several parts:

- The top portion of the console is used for [Search Management](#):



- The bottom portion of the console provides a [Summary of Results](#) for each task or location for the search selected in the Search Management portion. It also allows you to view and manage exceptions and log files.

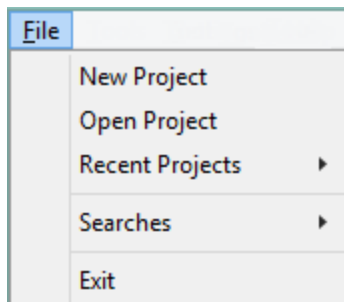
Results by Location	Location Type	Started	Elapsed	Excep...	Status	Hits	Messages	Attachments	Files
✓ warren ex2013 (EX2013.EXCHANGELAB.LOCAL)	Mailbox	2/21/2017 3:2...	8 Secs	0	Successful	1	0 of 6	1 of 2	0 of 0
✓ Amy Farrah, Fowler (EX2010.EXCHANGELAB.LOCAL)	Mailbox	2/21/2017 3:2...	15 Secs	0	Successful	0	0 of 1	0 of 0	0 of 0
✓ sha ex2013 (EX2013.EXCHANGELAB.LOCAL)	Mailbox	2/21/2017 3:2...	37 Secs	0	Successful	9	7 of 12	2 of 5	0 of 0
✓ nat ex2013 (EX2013.EXCHANGELAB.LOCAL)	Mailbox	2/21/2017 3:2...	24 Secs	0	Successful	2	2 of 4	0 of 0	0 of 0
✓ ex2013SAA (EX2013.EXCHANGELAB.LOCAL)	Mailbox	2/21/2017 3:2...	43 Secs	0	Successful	19	11 of 52	8 of 24	0 of 0
✓ Aaron Palmer (EX2010.EXCHANGELAB.LOCAL)	Mailbox	2/21/2017 3:2...	32 Secs	0	Successful	1	1 of 1	0 of 0	0 of 0
✓ June Cleaver (EX2013.EXCHANGELAB.LOCAL)	Mailbox	2/21/2017 3:2...	24 Secs	0	Successful	4	2 of 8	2 of 4	0 of 0

7 Locations listed 4.0.0

Application Menus and **Status Bar** round out the console screen.

Menus

File Menu



New Project	Creates a new project using the New Project Dialog .
Open Project	Allows the user to select a project from the Open Project Dialog .
Recent Projects	Allows user to select their project from a list of most recently used projects.
Searches	
New Search	Create a new search with an empty Search Wizard .
Load from Template	The user will be prompted for the location of a template (.dast file) to create a new search. Values from the template will populate the Search Wizard.
Search Again	Will create a new search based on the values of the selected

	search.
Save As Template	Saves the selected search as a template file (.dast).
Delete Search	Deletes the selected search. Note this also will delete all data stored in the directory of the selected search.
Open Results View	Opens the Result Management view for the selected search. All data exports, organization and filtering is managed from this screen.

Tools Menu

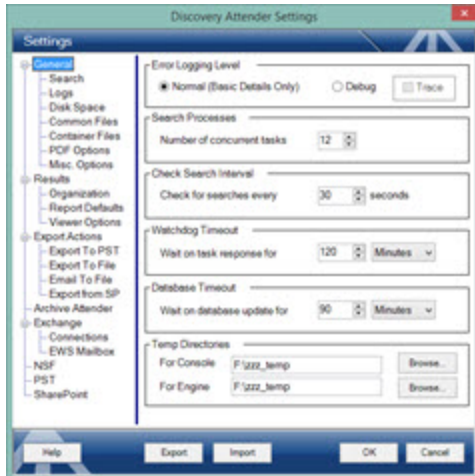
Tools
Show Searches In Progress
Pre Search
Custom Exceptions
Manage Custodians

Settings	Opens the Settings where application and action settings are stored.
Manage Custodians	Opens the Manage Custodians dialog box where users can add, edit or delete custodians associated with this project.
Show Searches In Progress	Opens the Searches in Progress window which tracks the task progress for currently running searches.
PreSearch	<p>Opens the Sherpa PreSearch Tool which allows users to perform tasks helpful before a search begins. Options in the PreSearch Tool Include:</p> <ul style="list-style-type: none"> • Deduplicating PST files • Export from a variety of data stores (Exchange, IMAP, O365, NSF, PST, etc.) • Conversions between a variety of data stores (OST to PST, NSF to PST, EML to PST, Journal format etc.) • Snapshot - creates a statistical model of PST files to assist with analysis of data <p>Some of these options can be refined by date, address or message type filters. A simple, easy to use wizard helps you set up the task details. The PreSearch tool also has powerful customization features allowing you to choose your own field mappings, deduplication criteria and other advanced settings.</p> <p>This PreSearch tool is completely independent from the main Discovery Attender processing. It has its own Help document, logging, methodology and algorithms.</p>
Custom Exceptions	Opens the Custom Exceptions dialog box which allows users to add and edit custom exceptions.

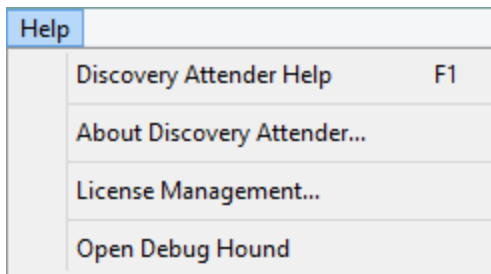
Settings Menu

Settings

This option opens the [Settings](#) screen which allows users to enable application level options.



Help Menu



Discovery Attender Help	Opens this help document. Help is context specific and can also be opened by clicking F1 or any visible Help button.
About Discovery Attender	Opens the About Discovery Attender form which shows details about the license key, contact information and version numbers for all the <i>Discovery Attender</i> components.
License Management	Opens the License Management screen which allows you to enter, validate and change license keys.

Main Console: Results by Location

By default, the lower half of the Main Console contains a list of the result locations (tasks) with summary data. It is also called the Task Summary.

Results by Location	Location Type	Started	Elapsed	Excep...	Status	Hits	Messages	Attachments	Files
✓ warren ex2013 (EX2013.EXCHANGELAB.LOCAL)	Mailbox	2/21/2017 3:2...	8 Secs	0	Successful	1	0 of 6	1 of 2	0 of 0
✓ Amy Farrah, Fowler (EX2010.EXCHANGELAB.LOCAL)	Mailbox	2/21/2017 3:2...	15 Secs	0	Successful	0	0 of 1	0 of 0	0 of 0
✓ sha ex2013 (EX2013.EXCHANGELAB.LOCAL)	Mailbox	2/21/2017 3:2...	37 Secs	0	Successful	9	7 of 12	2 of 5	0 of 0
✓ nat ex2013 (EX2013.EXCHANGELAB.LOCAL)	Mailbox	2/21/2017 3:2...	24 Secs	0	Successful	2	2 of 4	0 of 0	0 of 0
✓ ex2013SAA (EX2013.EXCHANGELAB.LOCAL)	Mailbox	2/21/2017 3:2...	43 Secs	0	Successful	19	11 of 52	8 of 24	0 of 0
✓ Aaron Palmer (EX2010.EXCHANGELAB.LOCAL)	Mailbox	2/21/2017 3:2...	32 Secs	0	Successful	1	1 of 1	0 of 0	0 of 0
✓ June Cleaver (EX2013.EXCHANGELAB.LOCAL)	Mailbox	2/21/2017 3:2...	24 Secs	0	Successful	4	2 of 8	2 of 4	0 of 0

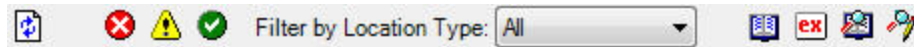
7 Locations listed 4.0.0

- This set of tasks is linked to the search selected in the [search management](#) portion of the screen.
- Double-clicking on a location item will open the text log file for error review and tracing for the individual task.
- After every search is complete, the logs should be checked for any task with values greater than 0 in the exceptions column.
- All columns can be sorted by clicking on the column header.
- List colors may change if the search is still processing.

Columns

	Description
<i>Results by Location</i>	Lists the name of individual task location
<i>Location Type</i>	Type of data store for this task (Mailbox, PST, Archive, Public Folder, Path)
<i>Started</i>	Time the task was started (if applicable)
<i>Elapsed</i>	Time it took for the task to complete (if applicable)
<i>Exceptions</i>	Total number of exceptions encountered while processing this task. See the task log file or combined exception log for details. To get to the task log file, double click on the result task item, to access the combined exception log select the EX icon
<i>Status</i>	The status of the task
<i>Hits</i>	Number of items which matched the search criteria in this particular task
<i>Messages</i>	Number of messages which matched the criteria of the total number of messages examined for this task.
<i>Attachments</i>	Number of attachments which matched the criteria of the total number of attachments examined for this task.
<i>Files</i>	Number of files which matched the criteria of the total number of files examined for this task. Directory hits and examined are included in this column.

Result Task Summary Toolbar and Menu Options



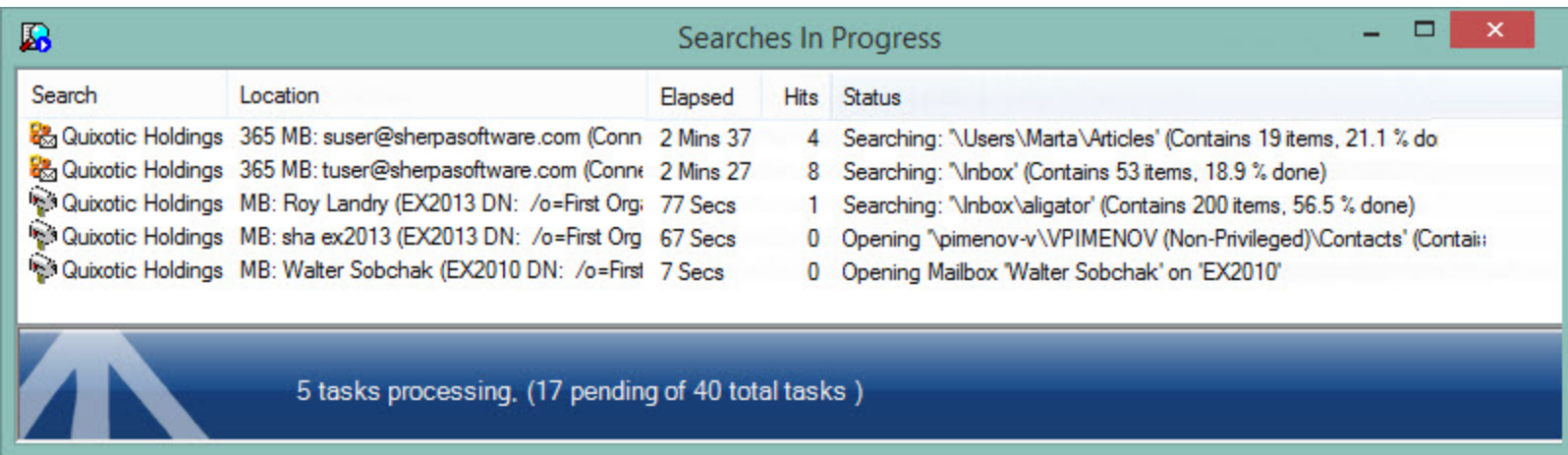
Icon	Context Menu	Description
	Refresh	Updates the listing
		Filters the task list to show only unsuccessful tasks such as Access Errors, Database errors, or tasks which were canceled
		Filters the task list to show only tasks which were completed successfully but contained some exceptions
		Filters the task list to show only tasks which were completed successfully no exceptions
	Open Detailed Log	Opens the individual text log file for this task that was created during the search
	View Selected Exceptions	View the combined exception logs management screen. <ul style="list-style-type: none"> If opened from the context (Right-Click) menu, the list will show exceptions for the selected task only. If the button is selected from the toolbar, all exceptions from all tasks will be shown in the list
	Re-Search Selected Tasks	Performs a <i>Search Again</i> on the tasks selected in the lower pane.
	Open Results	Open the Results Management view for the search
	Export List to CSV	Exports the current list to a CSV file
	Open Application Log	Opens the log file for the application

See Also

- [Main Console](#)

Searches in Progress Window

This window shows the tasks processing details for any searches in progress.



Description

The Searches in Progress window opens automatically when a search is started. The list is populated as tasks are initialized and begin processing. The list will constantly refresh as status fields are updated. Tasks leave the list once processing is complete, or if they have been canceled.

The screen will close automatically once all tasks from all active searches have been processed.

Closing this form will **not** cancel any of the tasks. If you close the list and wish to re-open it, select the Open Searches In Progress option from the toolbar or context menu on the [Main Console](#).

Options

- Double-Clicking on a listed task or selecting 'View Log File' from the context menu will open that task's active log file. Active SharePoint task log files are unavailable.
- To Cancel an individual task, select the item, Right-Click to bring up the context menu and select 'Cancel this Task'. Please be patient as it may take a few minutes for the task to register itself as canceled,

Columns

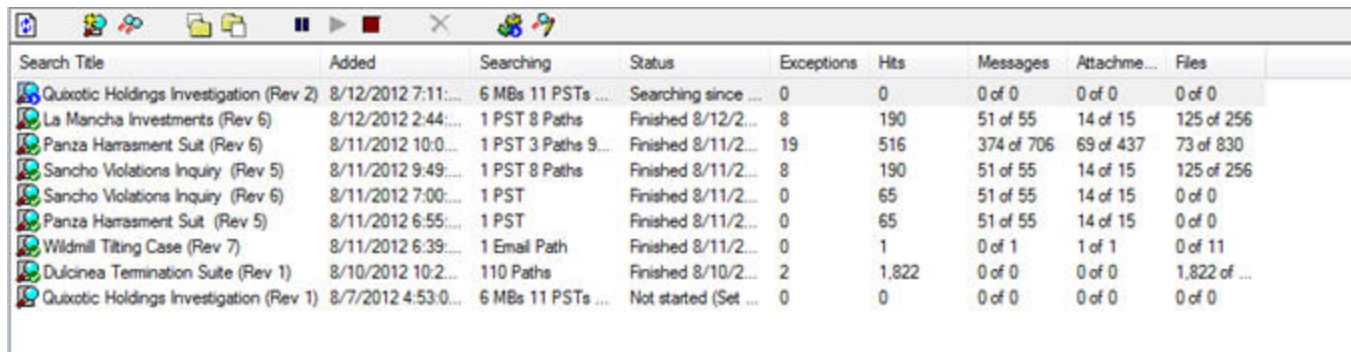
	Description
<i>Search</i>	Name of the search belonging to this task.
<i>Location</i>	Type of location being searched with its name and details
<i>Elapsed</i>	Time elapsed since the start of this task
<i>Hits</i>	Total number of hits found and processed thus far in the task.
<i>Status</i>	What the task process is currently doing.

See Also

[Main Console](#)

Main Console: Search Management

The top half of the Main Console contains the search summary data. This area holds a one line summary per search. Double-clicking on an individual item will open the [Results](#) window. Selecting an individual item will enable various toolbar features and show a listing on the bottom half of the screen.



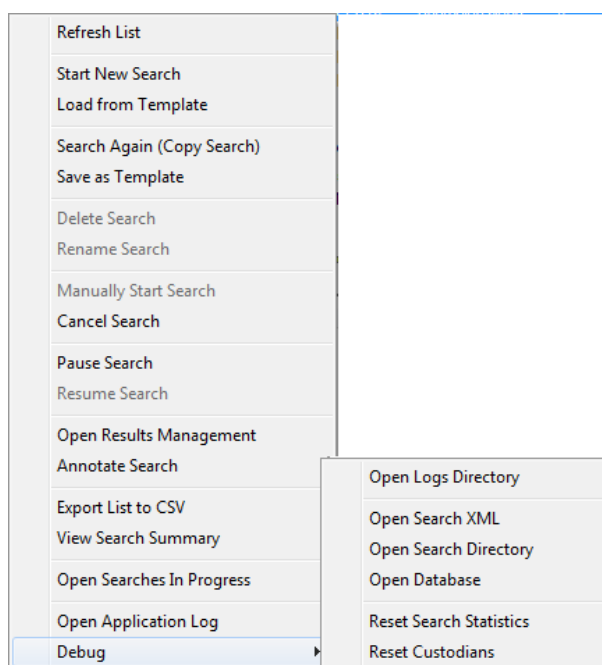
Search Title	Added	Searching	Status	Exceptions	Hits	Messages	Attachme...	Files
Quixotic Holdings Investigation (Rev 2)	8/12/2012 7:11:...	6 MBs 11 PSTs ...	Searching since ...	0	0	0 of 0	0 of 0	0 of 0
La Mancha Investments (Rev 6)	8/12/2012 2:44:...	1 PST 8 Paths	Finished 8/12/2...	8	190	51 of 55	14 of 15	125 of 256
Panza Harassment Suit (Rev 6)	8/11/2012 10:0:...	1 PST 3 Paths 9...	Finished 8/11/2...	19	516	374 of 706	69 of 437	73 of 830
Sancho Violations Inquiry (Rev 5)	8/11/2012 9:49:...	1 PST 8 Paths	Finished 8/11/2...	8	190	51 of 55	14 of 15	125 of 256
Sancho Violations Inquiry (Rev 6)	8/11/2012 7:00:...	1 PST	Finished 8/11/2...	0	65	51 of 55	14 of 15	0 of 0
Panza Harassment Suit (Rev 5)	8/11/2012 6:55:...	1 PST	Finished 8/11/2...	0	65	51 of 55	14 of 15	0 of 0
Wildmill Tilting Case (Rev 7)	8/11/2012 6:39:...	1 Email Path	Finished 8/11/2...	0	1	0 of 1	1 of 1	0 of 11
Dulcinea Termination Suite (Rev 1)	8/10/2012 10:2:...	110 Paths	Finished 8/10/2...	2	1,822	0 of 0	0 of 0	1,822 of ...
Quixotic Holdings Investigation (Rev 1)	8/7/2012 4:53:0...	6 MBs 11 PSTs ...	Not started (Set ...	0	0	0 of 0	0 of 0	0 of 0







Columns

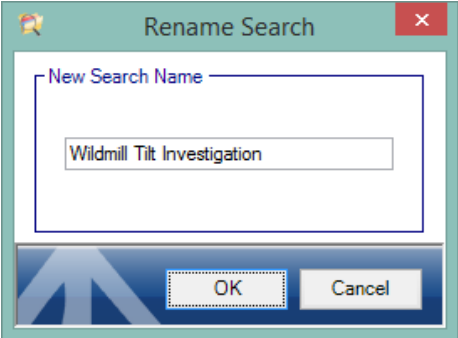



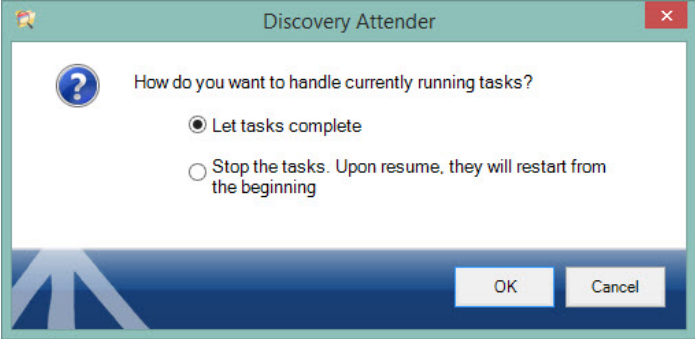


	Description
<i>Search Title</i>	Short descriptive summary of the search, chosen at the time of search creation
<i>Added</i>	Date the search was created
<i>Searching</i>	Number and types of items being searched
<i>Status</i>	Current standing of the search (see Status Descriptions)
<i>Exceptions</i>	The total number of exceptions encountered by all the tasks in this search (including ones that were canceled)
<i>Hits</i>	The total number of results of any type which matched the criteria for this search
<i>Messages</i>	Number of message hits (x) and total number of messages (y) examined in all the tasks of this search. Displayed in the format 'x of y'
<i>Attachments</i>	Number of attachment hits (x) and total number of attachments (y) examined in this search. Displayed in the format 'x of y'
<i>Files</i>	Number of file hits (x) and total number of files and folders (y) examined in this search. Displayed in the format 'x of y'. <i>NOTE:</i> Directory Hits are counted in this column. If you need a breakdown of files and directory hits, please see the Result Management 'By Location' view .


If you use *Discovery Attender* in a multi-user environment, you will notice that searches started on a 'foreign' machine (i.e. not your local machine) or a different installation will appear in a **light green** font. All standard (local) searches are in black font.

Search Summary Toolbar and Menu Options



Icon	Context Menu	Description
	<i>Refresh List</i>	Updates the details for the search listings
	<i>Start New Search</i>	Start a new search with a blank wizard
	<i>Load from Template</i>	Loads a search from a template file and opens a new search wizard with the values stored in the chosen template. Templates can be created in the wizard on by using the 'Save Template' option.
	<i>Search Again (Copy Search)</i>	Opens a new search wizard using the criteria of the selected search to populate the details.
	<i>Save as Template</i>	Saves the values of the selected search as a template file that can then be used in other projects or installations.
	<i>Delete Search</i>	Delete the selected search and all associated details including the database, search logs and any items stored under the folder of the selected search.
	<i>Rename Search</i>	Changes the name of the search to a new user-entered selection.

		 <p>To rename the search, enter the new name, then click 'OK'</p>
	<i>Manually Start Search</i>	<p>Starts the selected search. This choice is only enabled by selecting a search which is 'Not Yet Started' or 'Scheduled to Start'</p>
	<i>Cancel Search</i>	<p>Stop currently running search (only enabled by selecting a search that is currently in progress). This option will void any results for that search.</p>
	<i>Pause Search</i>	<p>Halts the currently running search and provides an option to restart the search.</p> <p>Since Discovery Attender cannot restart from the middle of a task, users are given a choice for the currently running tasks. The first choice is to let the tasks complete. All subsequent tasks will be halted.</p> <p>The section choice is to stop all running tasks. This will pause the search as quickly as possible, but those running tasks will need to start from the beginning when the search resumes.</p>  <p>Please note: You cannot alter any information or open a paused search.</p>
	<i>Resume Search</i>	<p>Restarts a search that has been paused.</p>
	<i>Open Result Management</i>	<p>Opens the Result Management view for organizing and exporting details for the selected search</p>
	<i>Annotate Search</i>	<p>Allows the user to open the Annotate Search screen to view</p>

		and add notes to the search which can be viewed by others. See Annotation for more details
	<i>Export List to CSV</i>	Exports the current list to a CSV file in a user selected location
	<i>View Search Summary</i>	Opens a simple text summary of the search criteria. More advanced reports can be found in the Result Management views.
	<i>Open Searches in Progress</i>	Opens the screen which shows the details for the locations which are currently processing
	<i>Open Application Log</i>	Opens the current day's log file for the application. For older logs, select to Debug Open Logs Directory.
	<i>Debug</i>	Shows debug options. This menu option is shown only if the 'Debug' logging is enabled in the Settings . Please note: Use these options with care and for troubleshooting with the guidance of a Technical Support representative.
	<i>Open Logs Directory</i>	Shows all application log files stored in the installation directory
	<i>Open Search XML</i>	Opens the Search.XML file for the currently selected search
	<i>Open Search Directory</i>	Shows the search directory for the currently selected search, all folders and files will then be accessible
	<i>Open Database</i>	Opens the back-end database (DA.mdb) for the selected search. Opening the database requires a version of Microsoft Access to be installed on the computer where Discovery Attender is installed. If it is not installed, an error will be shown.
	<i>Reset Statistics</i>	Clears the statistics stored in the Results. They will be recalculated upon opening the appropriate Result Management views.
	<i>Reset Custodians</i>	Clears all Custodian links. This means all Custodians will have to be reassigned to results. However, resetting custodians does not affect the actual custodian entries or aliases. Please note: Use these options with care and for troubleshooting only.




See Also

- [Main Console](#)

Search Wizard Overview

The *SEARCH WIZARD* guides the user through the creation of a search. Users customize searches by selecting the data store, location and criteria options available in the wizard pages. [Standard buttons](#) assist with navigation between screens. Once the search wizard setup is complete, proceed to the [next steps](#) section below.

The *SEARCH WIZARD* is accessed from the [MAIL_CONSOLE](#). Using the toolbar or context (right-click) or file menu, users can create a new search wizard with any of the following methods:

	New Search	Opens an empty wizard with default options. All data should be entered in the order of the wizard screens.
	Search Again	Uses the selected search to populate the options in the wizard screens. Use the navigation buttons to change details for the new search revision.
	Load From Template	Uses a template file to populate the details of the wizard screen. Templates store search criteria details outside the project in a specially formatted XML file.
	Re-search Selected Tasks	This option is used to perform a Search Again , but only on specific tasks that were selected from the bottom pane of the <i>MAIN_CONSOLE</i> .

Setting Up the Wizard

Wizard pages are enabled based on selections made on previous screens. You only need to choose the options that are required to fulfill your search objective (e.g., don't choose size criteria if the search only calls for a certain date range).

The search wizard screens are divided into several segments, each with its own set of pages. Clicking **NEXT** will continue the navigation through each section consecutively. Remember, you will only see the wizard pages that match the options selected on previous screens.

Clicking the on-screen [help button](#) will provide context-specific information about each individual wizard screen.

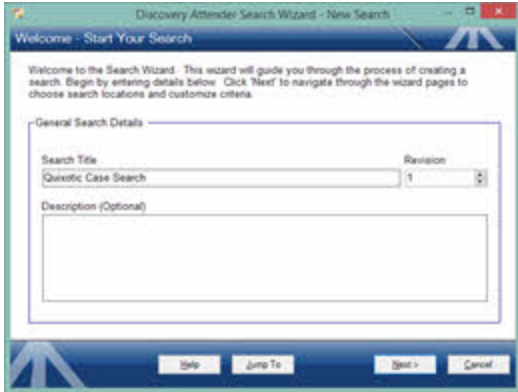
The search wizard sections include:

- [Describe the Search](#)
- [Select Data Store Types](#)
- [Choose Individual Data Stores](#)
- [Define the Criteria](#)
- [Set Individual Criteria Options](#)
- [Result Options](#)
- [Conclusion](#)

Describe the Search

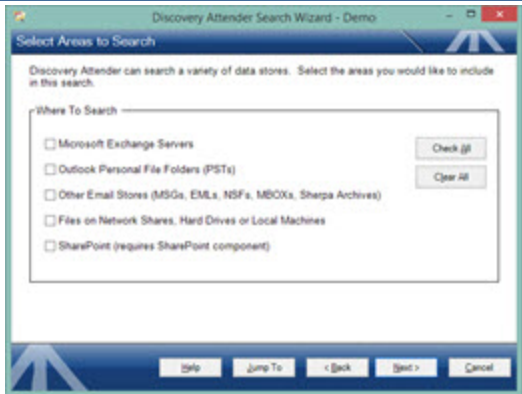
Enter details to enable easy identification of the search in reports or lists.

	Page View	Description
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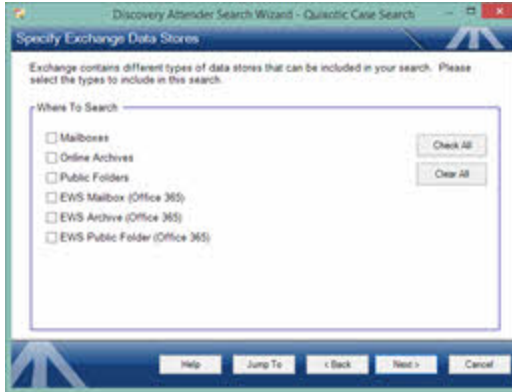
<p>Welcome - Start Your Search</p>		<p>Enter title and description of the search. This name will be displayed in the Main Console listing of searches as well as various reports.</p> <p>The Revision number can be used to distinguish similar searches from one another. It will also automatically iterate with any copied search.</p> <p>This page is standard and will be present in any search wizard setup.</p>
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Select Data Stores Types

This section tells *Discovery Attender* exactly which types of data to include in the search. This, in turn, determines the wizard pages used to select specific data stores to include in the search.

	Page View	Description
<p>Select Areas to Search</p>		<p>Specify general types of data stores to search.</p> <p>This page is standard and will be present in any search wizard setup.</p>

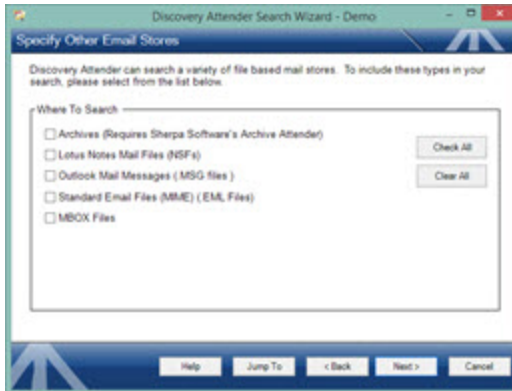
[Specify Exchange Data Stores](#)



Choose specific types of Exchange based data stores be they on-premises or Office 365.

This page only appears if **Microsoft Exchange Servers** was chosen in the [Select Areas to Search](#) page.

[Specify Other Email Stores](#)



Specify other email data stores to include in the search. The options include:

- [Sherpa Software Archives](#)
- Lotus Notes Mail Files (NSF)
- Outlook Mail Messages (.MSG Files)
- Standard Email Files (MIME) (.EML Files)
- MBOX mail files

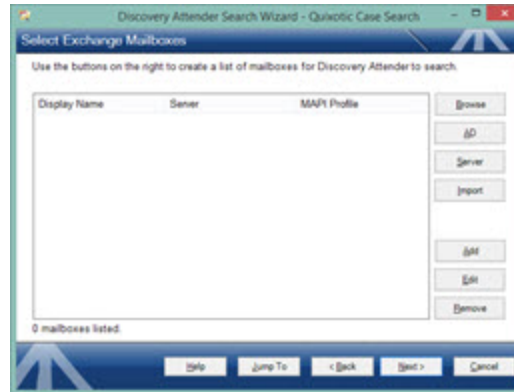
This page only appears if the **Other Email Stores** option was chosen in the [Select Areas to Search](#) page

Choose Individual Data Stores

This section provides wizard pages to help users select the individual data store locations to include in the search.

	Page View	Description
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Select Exchange Mailboxes

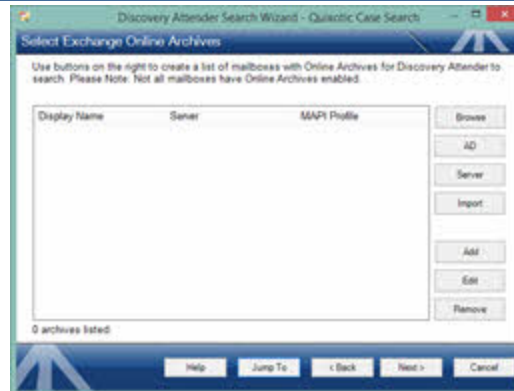


Choose specific Microsoft Exchange mailboxes.

This page will only appear if the **Mailbox** option was selected in the [Specify Exchange Data Stores](#) wizard page.

Note: This option is specific to on-premises Exchange servers using MAPI connections only. If you wish to search O365 or other EWS data stores, return to the [Specify Exchange Data Stores](#) wizard page and select the O365 / EWS options.

Select Exchange Online Archives



Choose specific Online Archives to search (on premises Exchange 2010 and above only).

This page will only appear if the **Online Archives** option was selected in the [Specify Exchange Data Stores](#) wizard page.

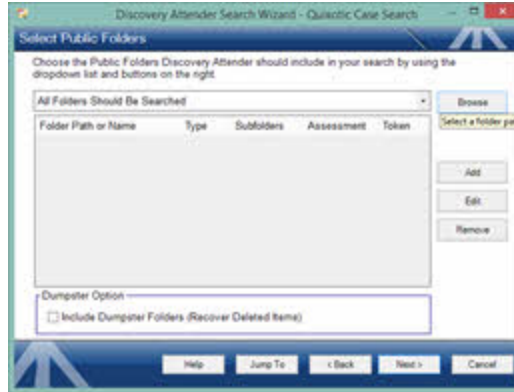
Configure Public Folders Mailbox



Enter a mailbox used for Public Folder configuration.

This page will only appear if the **Public Folders** option was selected in the [Specify Exchange Data Stores](#) wizard page.

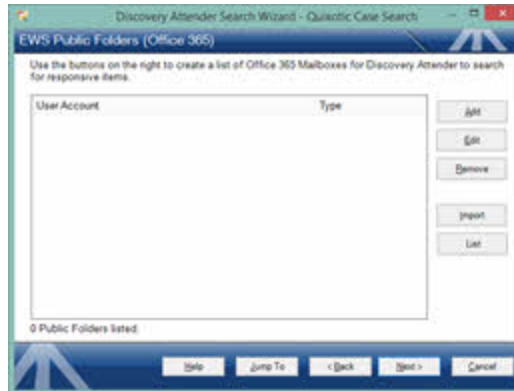
[Select Public Folders](#)



Specify Public Folders to include in the search.

This page will only appear if the **Public Folders** option was selected in the [Specify Exchange Data Stores](#) wizard page.

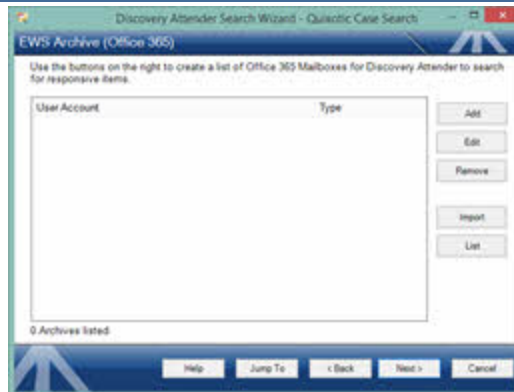
[Select EWS Mailbox \(Office 365\)](#)



Specify the EWS (Office 365) mailboxes to include in this search.

This page will only appear if the **EWS Mailbox** option was selected in the [Specify Exchange Data Stores](#) wizard page.

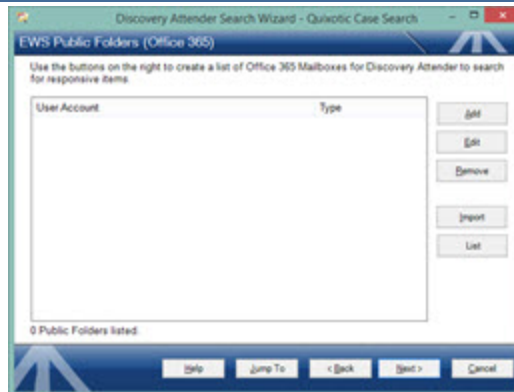
[Select EWS Online Archive \(Office 365\)](#)



Specify the EWS (Office 365) online archives to include in this search.

This page will only appear if the **EWS Online Archive** option was selected in the [Specify Exchange Data Stores](#) wizard page.

[Select EWS Public Folder \(Office 365\)](#)



Specify the EWS (Office 365) public to include in this search.

This page will only appear if the **EWS Public Folder** option was selected in the [Specify Exchange Data Stores](#) wizard page.

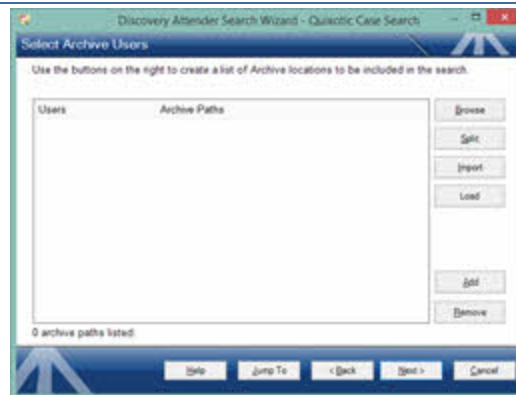
[Select PST Files](#)



Chose PST files to include in the search.

This page will only appear if the **Outlook Personal Folders (PSTs)** option was selected in the [Select Areas to Search](#) wizard page.

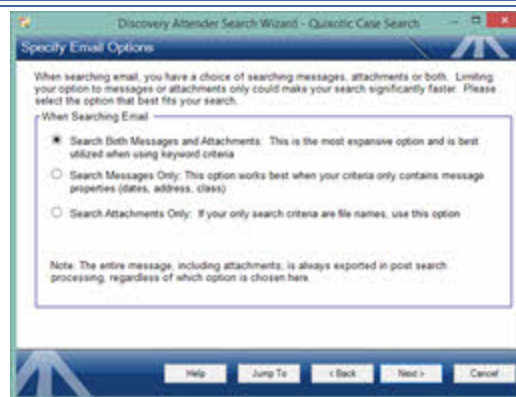
[Select Archive Users](#)



Select archive users and folders to include in the search (requires Sherpa Software's *Archive Attender*).

This page will only appear if the **Archives** option was selected in the [Specify Other Email Stores](#) wizard page.

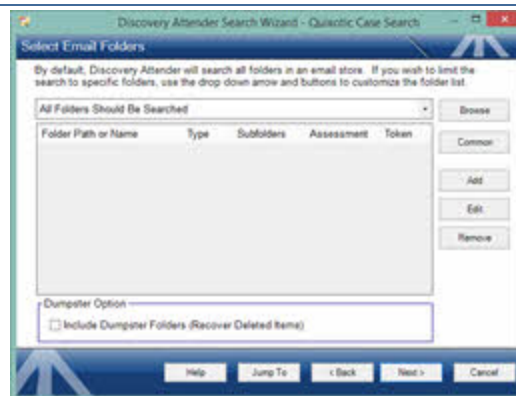
[Specify Email Options](#)



Choose options for searching email by defining which portion to include in your search .

This page will appear if any email store is being searched.

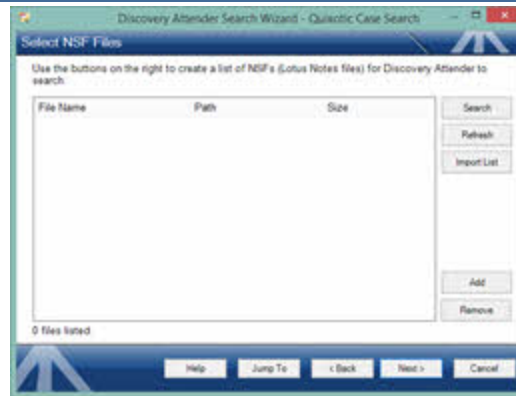
[Select Email Folders](#)



Specify which email folders to include in the search.

This option is relevant for any non-NSF email stores included in the search

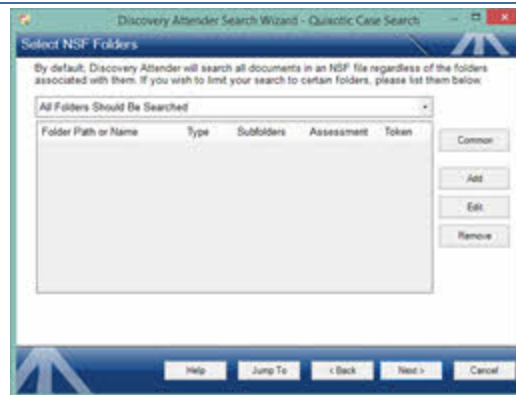
[Select NSF Files](#)



Choose NSF files to include in the search.

This page will only appear if the **Lotus Notes Email Files (NSFs)** option is selected in the [Specify Other Email Stores](#) wizard page.

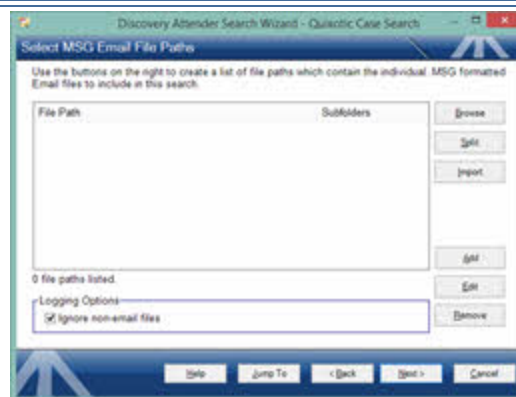
[Select NSF Folders](#)



Choose the folders to search in NSF stores.

This page will only appear if the **Lotus Notes Email Files (NSFs)** option is selected in the [Specify Other Email Stores](#) wizard page.

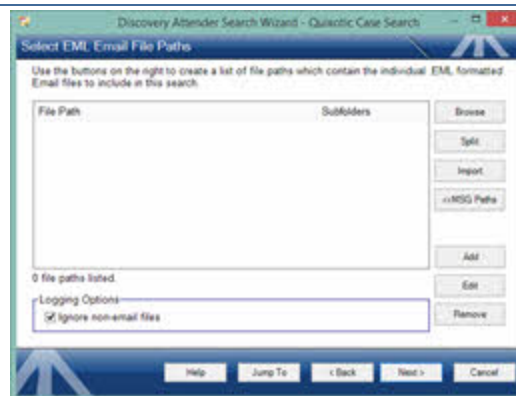
[Select MSG File Paths](#)



Choose the paths containing any individual MSG email items to include in this search.

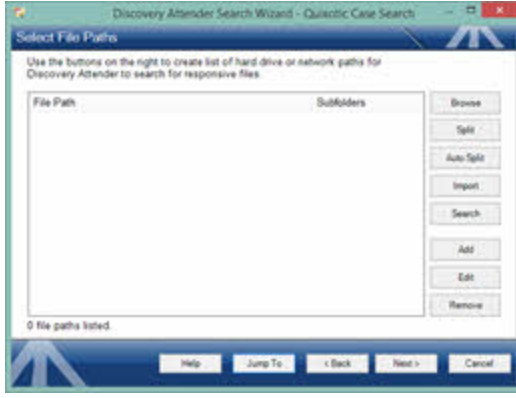
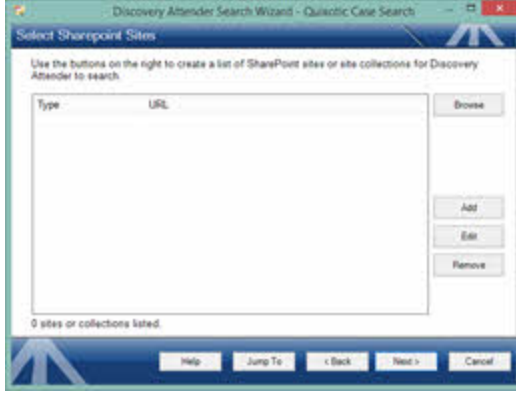
This page will only appear if the **Outlook Mail Messages (MSG Files)** option was selected in the [Specify Other Email Stores](#) wizard page.

[Select EML File Paths](#)



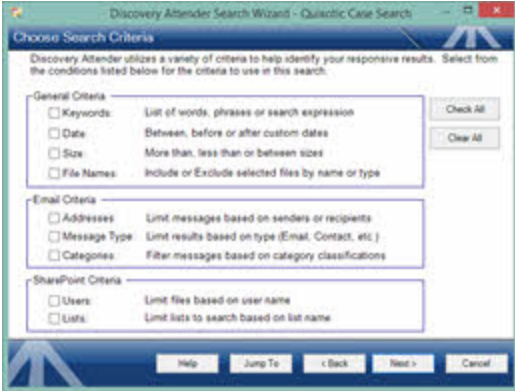
Choose the paths containing any individual .EML email items to include in this search.

This page will only appear if the **Standard Email Files (MIME) (.EML files)** option was selected in the [Specify Other Email Stores](#) wizard page.

<p>Select File Paths</p>		<p>Select the paths containing non-mail files to include in this search.</p> <p>This page will only appear if the Files on Network Shares... option was selected in the Select Areas to Search wizard page.</p>
<p>Select SharePoint Sites</p>		<p>Choose the sites and collections from SharePoint Servers to include in the search.</p> <p>This page will only appear if the SharePoint option was selected in the Select Areas to Search wizard page.</p> <p>Note: To search for files on SharePoint servers, a separate license is required and a special component must be installed in the SharePoint server farm.</p>

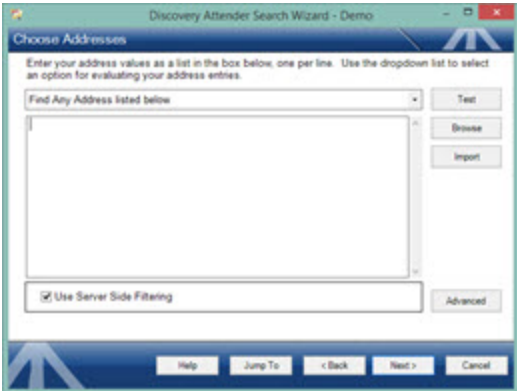
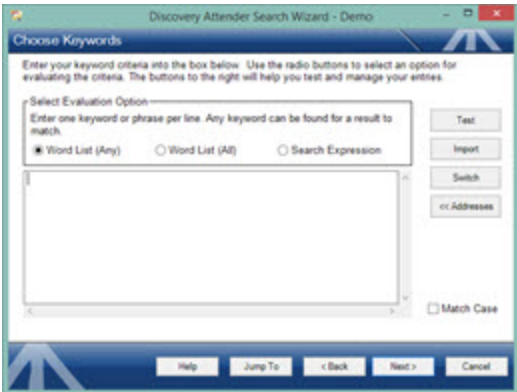
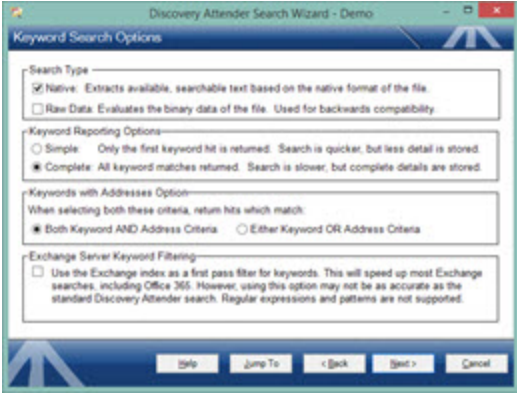
Define the Criteria

Once the locations are selected, users will choose what criteria to use. This screen identifies which criteria screens to show in the wizard.

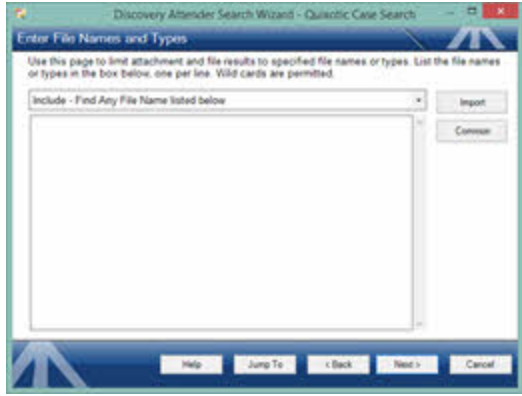
	Page View	Description
<p>Choose Search Criteria</p>		<p>Specify the types of criteria to use in this search.</p> <p>This page is standard and will be present in any search wizard setup.</p>

Set Individual Criteria Options

This section allows users to customize the individual criteria options.

	Page View	Description
<p>Choose Addresses</p>		<p>Enter the address criteria to use in the search.</p> <p>This wizard page will only appear if the Address criteria was selected on the Choose Search Criteria page.</p>
<p>Choose Keywords</p>		<p>Enter the keyword criteria to use in the search.</p> <p>This wizard page will only appear if the Keyword criteria was selected on the Choose Search Criteria page.</p>
<p>Keyword Search Options</p>		<p>Specify the options for keyword criteria.</p> <p>This wizard page will only appear if the Keyword criteria was selected on the Choose Search Criteria page.</p>

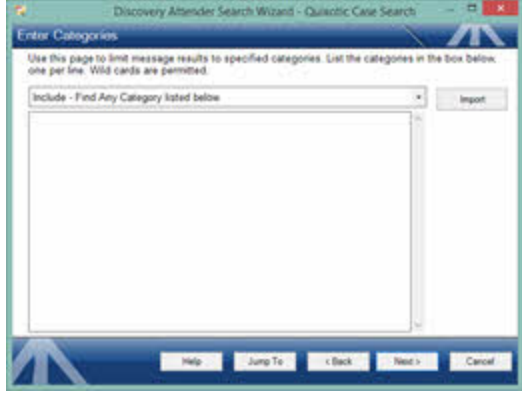
[Enter File Names and Types](#)



Choose the file name or type criteria to use in the search

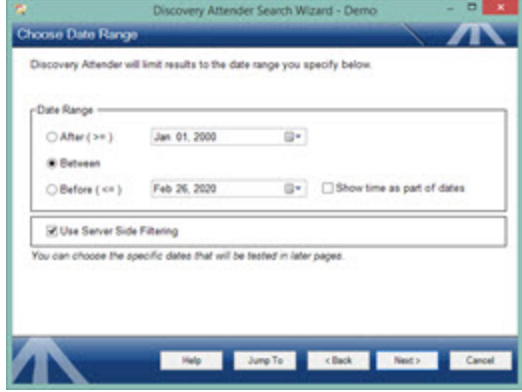
This wizard page will only appear if the **File Names** criteria was selected on the [Choose Search Criteria](#) page.

[Enter Categories](#)



Choose the email categories to include in your search. This wizard page will only appear if Categories was selected on the [Choose Search Criteria](#) page.

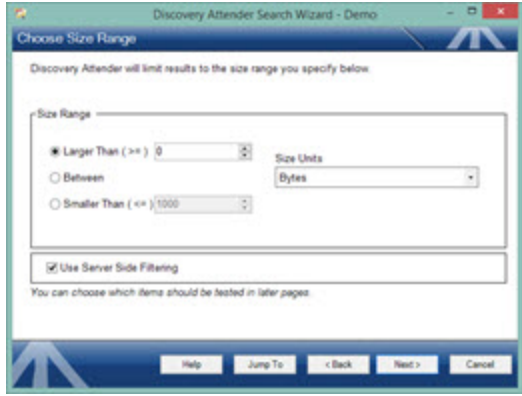
[Choose Date Range](#)



Select a date range to use in the search.

This wizard page will only appear if the 'Dates' criteria was selected on the [Choose Search Criteria](#) page.

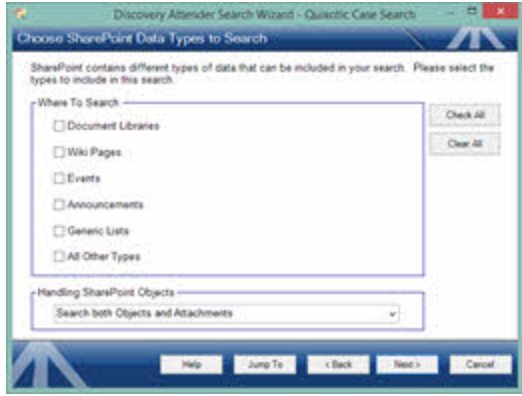
[Choose Size Range](#)



Select a size range to use in the search.

This wizard page will only appear if the **Size** criteria was selected on the [Choose Search Criteria](#) page.

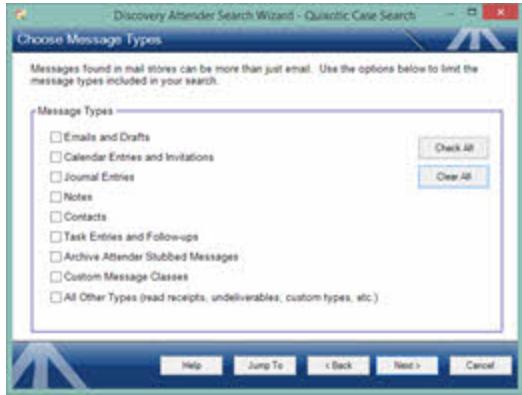
[SharePoint Data Types](#)



Select the data types to search for when searching SharePoint Data stores.

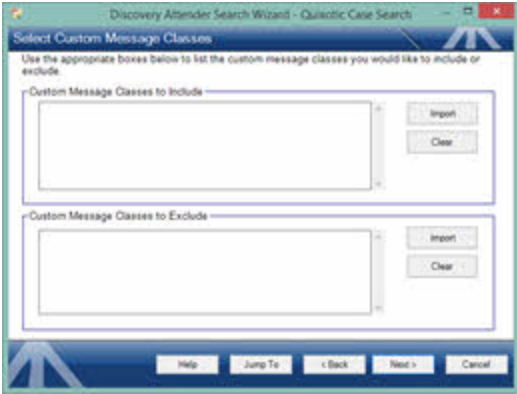
This wizard page will only appear if the SharePoint criteria was selected on the [Select Areas to Search](#) wizard page.

[Choose Message Types](#)



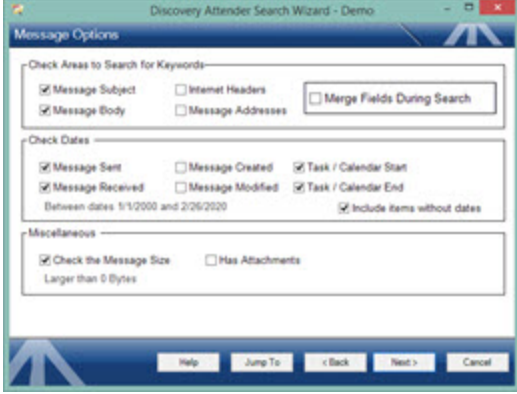

Limit message types for email-based items.


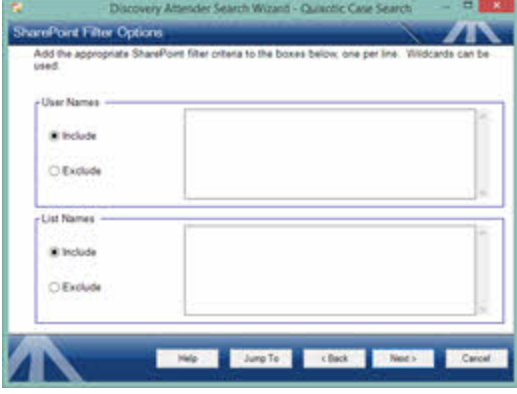
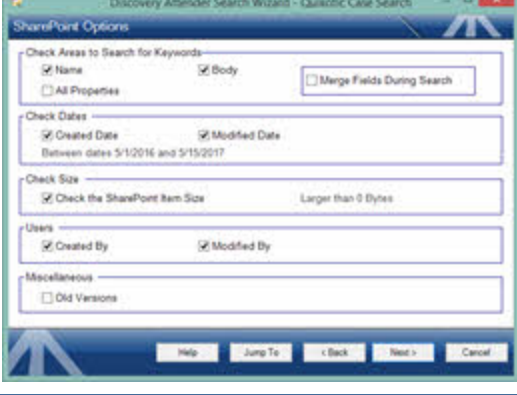
This wizard page will only appear if the **Message Types** criteria was selected on the [Choose Search Criteria](#) page.

<p>Select Custom Message Classes</p>		<p>Enter custom types to further refine message criteria.</p> <p>This wizard page will only appear if the Message Types criteria was selected on the Choose Search Criteria page.</p>

Applying the Criteria to Specific Types

This section allows users to further specify which criteria to use for each result type .

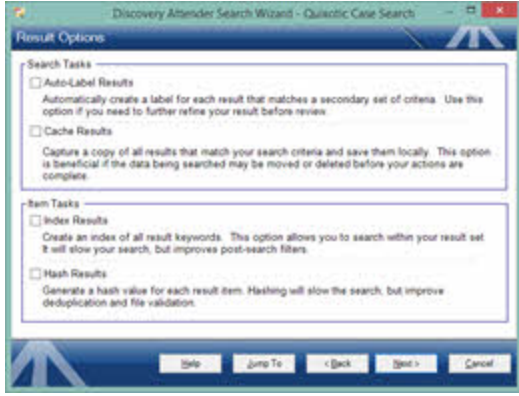
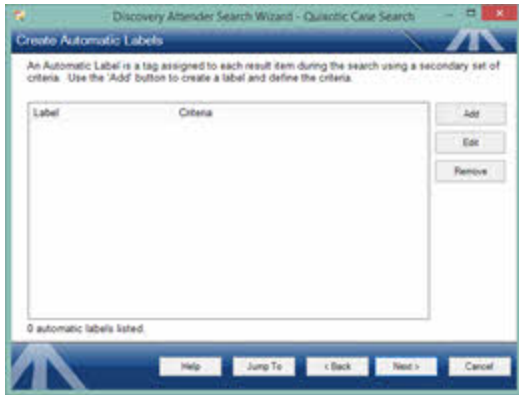
	Page View	Description
<p>Message Options</p>		<p>Specify the criteria options for searching message items.</p> <p>This wizard page will only appear if either of the message options were selected on the Specify Email Options page.</p>
<p>Attachment Options</p>		<p>Specify the criteria options for searching attachment items</p> <p>This wizard page will only appear if either of the attachment options were selected on the Specify Email Options page.</p>

<p>File Options</p>		<p>Specify the criteria options for searching file items.</p> <p>This wizard page will only appear if file paths are being searched.</p>
<p>SharePoint Filter Options</p>		<p>These options are used if Users or Lists were selected as part of the SharePoint criteria in the Choose Search Criteria wizard page.</p>
<p>SharePoint Options</p>		<p>Specify the criteria for searching files on SharePoint. This wizard page will only appear if SharePoint document libraries are searched.</p>

Result Options

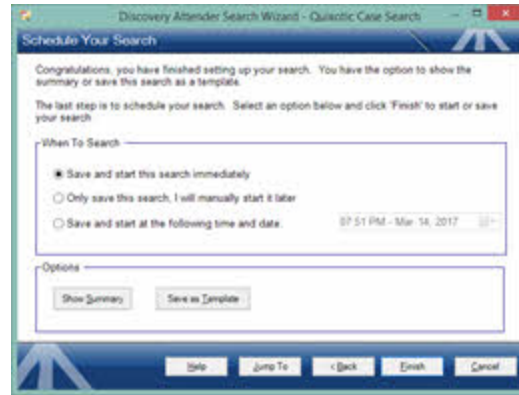
Use this section to select helpful options to assist in processing results .

	Page View	Description
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<p>Result Options</p>		<p>Choose different options to help process results including caching, hashing, indexing and automatic labels.</p> <p>This page is standard and will be present in any search wizard setup.</p>
<p>Create Automatic Labels</p>		<p>Define labels to use to identify a secondary set of search criteria.</p> <p>This wizard page will only appear the Auto-Label Results option was selected on the Result Options page.</p>

Conclusion

Once all the details have been entered, use this section to initiate the search process.

	Page View	Description
<p>Schedule Your Search</p>		<p>Set up the timetable for the processing of the search.</p> <p>This page is standard and will be present in any search wizard setup.</p>

Next Steps

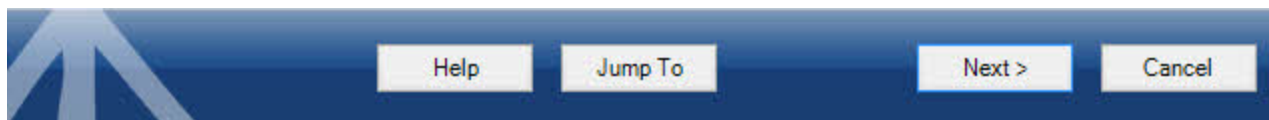
Your search is now created. If you have decided to start the search immediately, the [Searches in Progress](#) screen will open and display the status of individual tasks that are being processed. If you scheduled your search, or set it to manual start, you will be returned to the [Main Console](#).

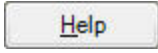
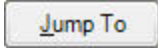
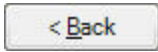
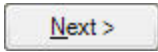

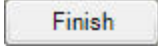
Once all the tasks in the search have finished processing, you can move onto the next steps to manage and retrieve the relevant data.

	Description
Analyze Exceptions	Use logging and exception identification to review and manage exceptions encountered during the search.
Review Results	Preview your results using built-in views, Preview Pane, integrated Text Search Viewer as well as advanced filters .
Organize Results	The Results Management screen provides options to organize, view, deduplicate, filter and group the items found during the search.
Export Results	Copy or move items to new or existing mail stores or individual files. Options are available to export results by groups, by source, custodian, or other specific criteria.
Create Reports	Discovery Attender offers a number of useful reports that supply detailed audit trails, chain of custody as well as summarize the search and results.

Wizard Navigation Buttons

There are several buttons used for navigating through the wizard screens:



	Opens the context specific help for the current wizard page.
	Opens a menu listing the wizard pages that are available up to this point. As options are selected, pages may be entered or removed from the list. You can 'jump' forward or backwards. Data may need to be entered on the current page before you can 'jump' to another page.
	Returns to the previous wizard screen.
	Proceeds to the subsequent wizard screen. The program may not let you advance unless specific information is entered on the current screen. If so, a message box will appear explaining why the wizard can not continue.
	Stops the current <i>SEARCH WIZARD</i> . You will be asked to verify the cancellation. If you choose Yes , all conditions entered up to this point will be lost.
	Only shown at the end of the <i>SEARCH WIZARD</i> , this button initiates the search based on the scheduling option selected.

Search Wizard: Welcome - Start Your Search

This is the first screen to appear when the search wizard is started.

Discovery Attender Search Wizard - New Search

Welcome - Start Your Search

Welcome to the Search Wizard. This wizard will guide you through the process of creating a search. Begin by entering details below. Click 'Next' to navigate through the wizard pages to choose search locations and customize criteria.

General Search Details

Search Title: Quixotic Case Search

Revision: 1

Description (Optional)

Help Jump To Next > Cancel

Description

This page allows the user to enter descriptive data about the search. The title and revision number help identify the search in the other views and reports.

Options

	Description
Search Title	Title used to identify the search in the Main Console and log files.
Revision	Number indicating the version of this search. This is helpful for distinguishing searches with the same Search Title. If you are performing a Search Again or loading a search from a template, the revision number will automatically be incremented to help distinguish the new search

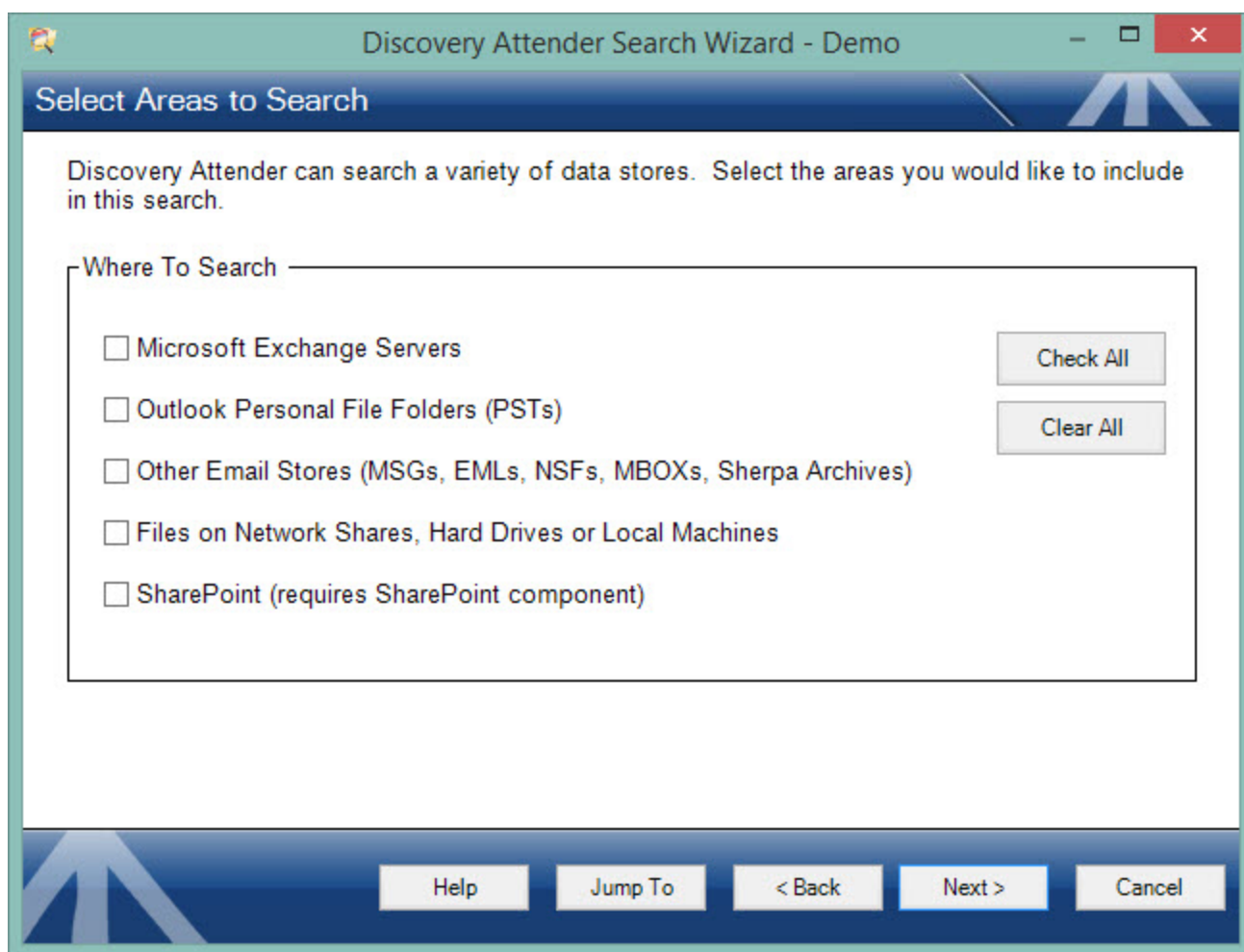
	from others with the same name.
Description (Optional)	More detailed notes or comments about this the search. Although this description cannot be modified after the search has been created, it is possible to annotate the search after it has run to include any additional comments.

See Also

- [Navigation Buttons](#)
- [Table of Contents](#)

Search Wizard: Select Areas to Search

This second wizard screen will appear for all searches. Use this page to select the data store types to include in the search.



Description

This wizard screen tells *Discovery Attender* which types of data repositories to include in your search. It controls which screens will appear subsequently in the wizard to enter individual data store locations. For

example, if you select **Outlook Personal Files (PSTs)**, then all the PST and email related wizard screens will be shown as you navigate through the wizard.

Options

	Description
Microsoft Exchange Servers	<p>Check this box if the search will include Exchange Mailboxes, Online Archives, Public Folders or EWS related Exchange data stores (e.g. Office 365).</p> <p>Note:</p> <ul style="list-style-type: none"> To search on premises mailboxes successfully, the login account must have the correct permissions to search the mailboxes, online archives or public folders. If searching EWS based stores (i.e. Office 365), you must have correct permissions to the individual mailboxes, or delegated account access.
Outlook Personal Folders (PSTs)	<p>The search will include PST files stored in network or hard drive locations. PST files, also known as Outlook Personal Folders, were traditionally used to organize a number of messages in one file for archiving or storage purposes.</p> <p>To search PST files successfully, the login account will need read/write permission to the directories where your PST files are stored, and exclusive access to those files</p>
Other Email Stores (MSGs, EMLs, NSFs, MBOX, Sherpa Archives)	<p>The search will include other email stores outside of Exchange or PST files.</p> <p>You will be able to clarify which data stores to include in your search on subsequent screens.</p>
Files on Network Shares, Hard Drives or Local Machines	<p>The search will return electronic files stored on a hard drive or network share. <i>Discovery Attender</i> can access most directories available as a share in the Microsoft Window Explorer window. Selecting this option will return File result types.</p> <p>Note: If you are searching for email in PST files, use the Outlook Personal Folders (PSTs) option to enable PST searching functionality. All items located using the Hard Drive and Network Shares option will be searched as *files*.</p> <p>See Supported File Formats for a list of file types that can be searched.</p>
SharePoint (requires SharePoint component)	<p>Search data users have uploaded to a SharePoint servers. Please read the SharePoint summary for more detail and tips regarding searching SharePoint servers.</p> <p>Please note: A separate license is required to successfully search for</p>

	files on a SharePoint server. In addition, a separate component must be installed on a server in the SharePoint farm for searches to be successful.
--	---

Buttons

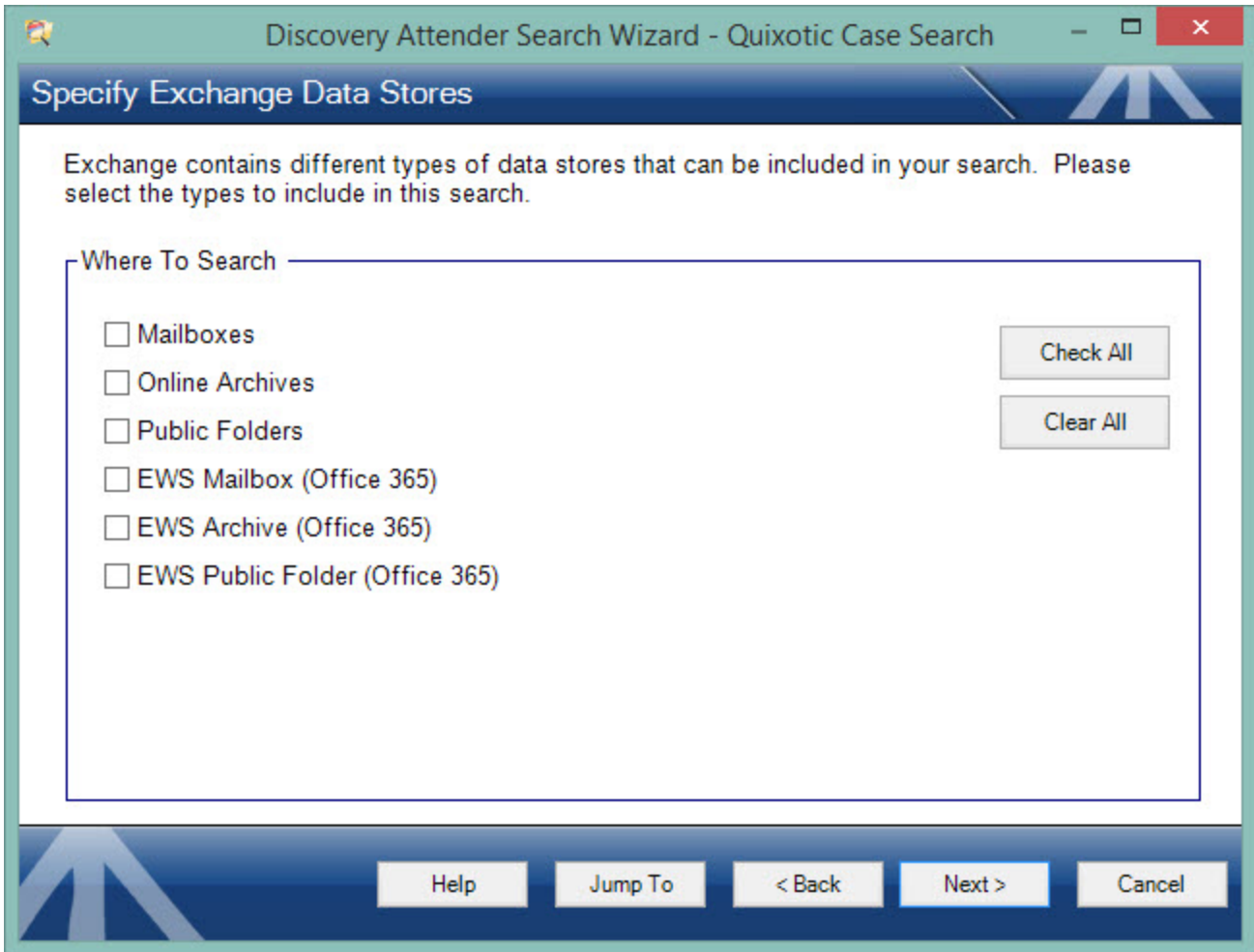
<input type="button" value="Check All"/>	Select (check) all check boxes in the criteria list
<input type="button" value="Clear All"/>	Un-check all check boxes in the criteria list

See Also

- [Supported File Formats](#)
- [SharePoint Summary](#)
- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Specify Exchange Data Stores

This screen will appear when you select *Microsoft Exchange Servers* on the [Select Areas to Search](#) page.



Description

This page allows the user to refine the types of data stores hosted by Microsoft Exchange servers, either on-premises or in the cloud (i.e. Office 365), to include in the search.

Note: In order to successfully search any mail store, the correct permissions must first be enabled in the [Settings](#).

Options

	Description
Mailboxes	Choose this option to include Mailboxes in the search. The mailboxes designated here must be located in on-premises Microsoft Exchange servers. To search mailboxes successfully, the login account must have the correct permissions to search mailboxes.

Online Archives	The search will include Online Archives found on Microsoft Exchange servers version 2010 and above.
Public Folders	The search will include Exchange Public Folders. Public Folders are created on an Exchange server as a repository where data can be shared between multiple users. To successfully search Public Folders, Discovery Attender requires access to an individual mailbox that has the appropriate permissions needed to access the Public FolderS included in your search.
EWS Mailbox (Office 365)	Search Exchange mailboxes using EWS connectivity. This includes Office 365 mailboxes.
EWS Archive (Office 365)	Search Exchange Online Archives using EWS connectivity. This includes Online Archives in Office 365 .
EWS Public Folder (Office 365)	Search Exchange Public Folders using EWS connectivity. This includes Public Folders in Office 365 .

Buttons

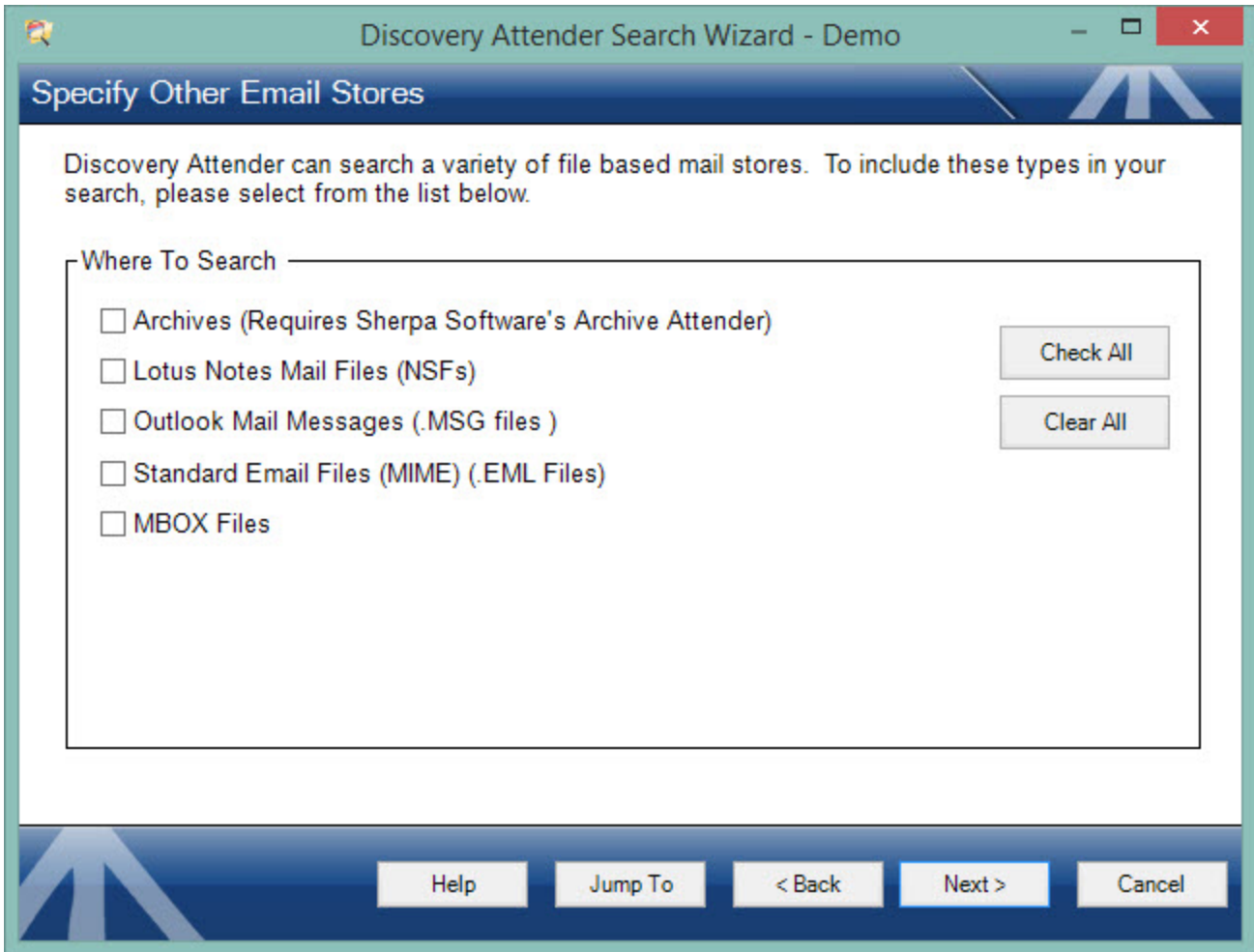
<input type="button" value="Check All"/>	Select (check) all check boxes in the criteria list
<input type="button" value="Clear All"/>	Un-check all check boxes in the criteria list

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Specify Other Email Stores

This screen will appear when you select **Other Email Stores** on the [Select Areas to Search](#) page.



Description

This page allows the user to choose additional, non-typical email data stores to include in the search. Choose the appropriate option to show the correct wizard screens for selecting the related data stores.

Options

	Description
Archives (Requires Sherpa Software's Archive Attender)	Search email archives created by Sherpa Software's <i>Archive Attender</i> . Please note, if you do not wish to see this option in the Search Wizard, navigate to Tools Settings Archive Attender to disable the it. Click here for more information on <i>Archive Attender</i> .
Lotus Notes Mail Files	Search Lotus Notes email files, including attachments.

(NSFs)	Note: This option cannot be used to search non-mail Notes databases.
Outlook Mail Messages (MSG files)	Search individual file paths containing individual email messages in the Microsoft MSG format. This option allows you to use email specific criteria such as address, message type, or sent date, in addition to keyword criteria.
Standard Email Files (MIME) (.EML Files)	Search individual file paths containing individual email messages in the MIME .EML format. This option allows you to use email specific criteria such as address, message type or sent date, in addition to keyword and date criteria.
MBOX Files	Search email files in native MBOX format, including all attachments. The results will be exported to EML.

Buttons

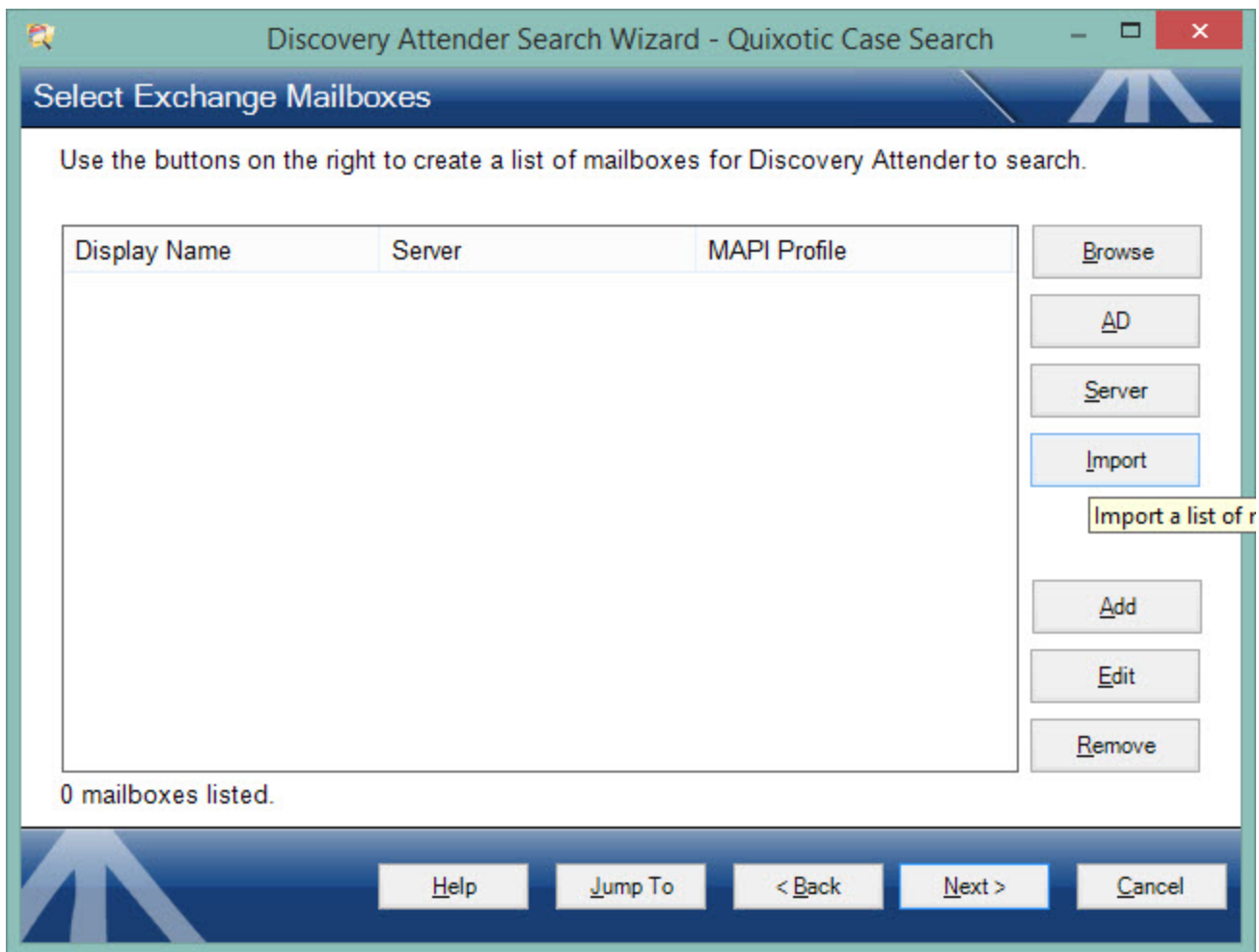
<input type="button" value="Check All"/>	Select (check) all check boxes in the criteria list
<input type="button" value="Clear All"/>	Un-check all check boxes in the criteria list

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Select Exchange Mailboxes

This screen will appear when you select **Mailboxes** on the [Specify Exchange Data Stores](#) page.



Description

This screen allows you to create and edit a list of on-premises Microsoft Exchange Mailboxes to include in the search. This option uses MAPI to search mailboxes. If your organization does not have MAPI enabled, please choose the EWS option on the [SPECIFY EXCHANGE DATA STORE](#) wizard page.

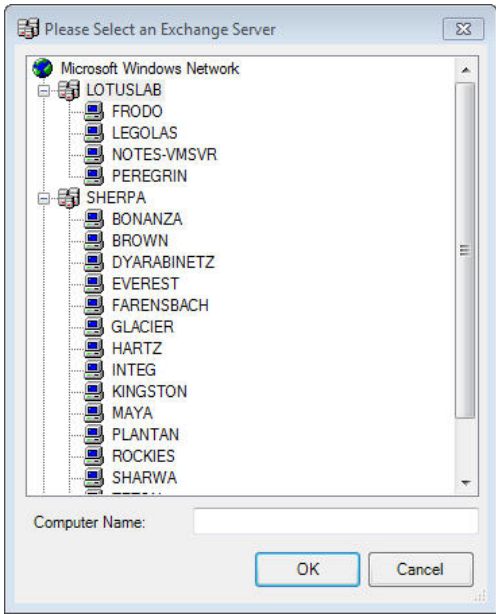
To successfully select and search Mailboxes, the **MAPI Master Profile** selected in the [SETTINGS](#) must have full permissions to the mailboxes being searched.

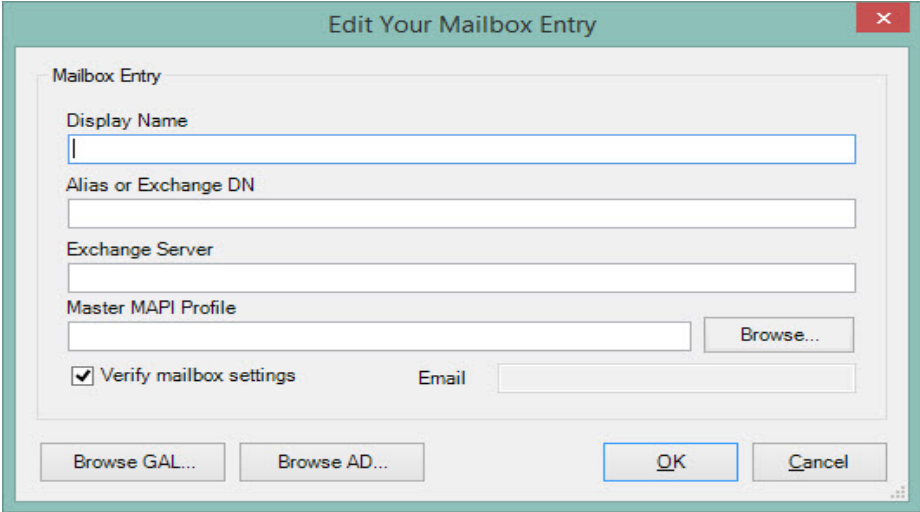
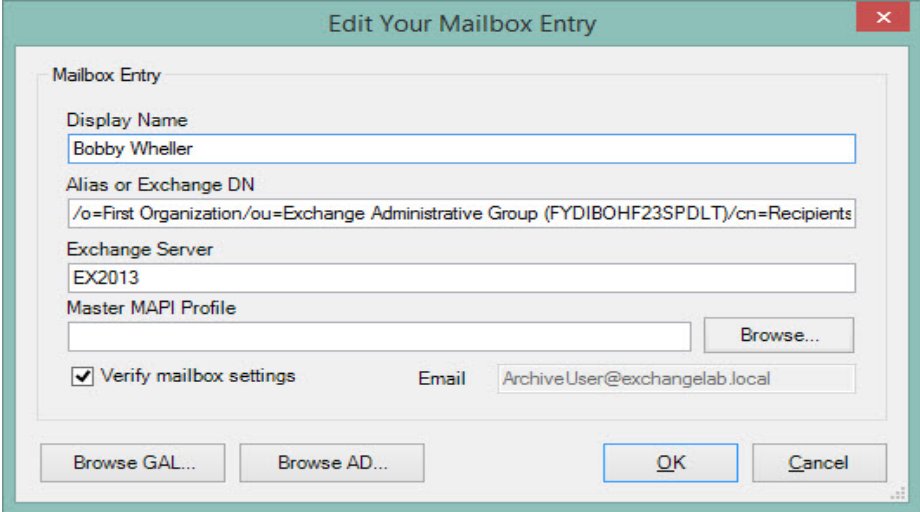
Columns

Title	Description
Display Name	Name of the mailbox users.
Server	Server where the mail files are found.
MAPI Profile	When searching on-premises Exchange, you will need to use a Master MAPI profile . This can be set in two ways. The first is to set the value individually, per mailbox, using the ADD or EDIT buttons on this screen. The second method is to use the <i>Settings Exchange Connections options</i> to des-

	<p>ignate a default profile to use in all instances. When using the latter option, this column may not have a value.</p> <p>Note: This option is needed for all versions of Exchange 2010 and above. Earlier versions of Exchange did not require profiles to be created for access, however, they are no longer supported by Microsoft.</p>
--	--

Buttons

	Description
Browse	Allows the user to browse the Global Address List (GAL) for mailboxes to add to the list.
AD	Allows users to query Active Directory for mailboxes to add to the list.
Server	<p>Useful only for Exchange 2007 or earlier, this option allows users to query Exchange servers to add all mailboxes from a selected server to the mailbox list.</p> <div style="text-align: center;">  </div> <p>Select the Exchange server that contains the mailboxes to include in your search, then click OK. If the server is not listed, or you cannot navigate to it, try entering the fully qualified server name in the Computer Name section. Alternately, try using Active Directory.</p> <p>Note: Hidden and System mailboxes are not searchable via <i>Discovery Attender</i>. However, they can be added when selecting the entire mailbox server with this feature. Please make sure you review the entire mailbox list for non-searchable mailboxes before continuing. If non-searchable mailboxes are included in the search, those tasks will fail with access errors.</p>
Import	Allows the user to import a mailbox list from a .csv or .txt file.

<p>Add</p>	<p>Allows the user to add a new mailbox by entering the credentials one by one.</p>  <p>Mailbox permissions can also be validated with this screen if the 'Verify mailbox settings' option is enabled.</p>
<p>Edit</p>	<p>Allows the user to edit a selected mailbox.</p> 
<p>Remove</p>	<p>Removes the selected mailboxes from the list.</p>

Context Menu

	Description
Select All	Selects all items in the list

Remove	Removes the selected mailbox
Export	Exports the list of mailboxes
Export to Text	... to a text file
Export to CSV	...to a .csv file (which can be opened in Excel)
Import	Imports a list of mailboxes from a file. See Import Format Page for more detail.

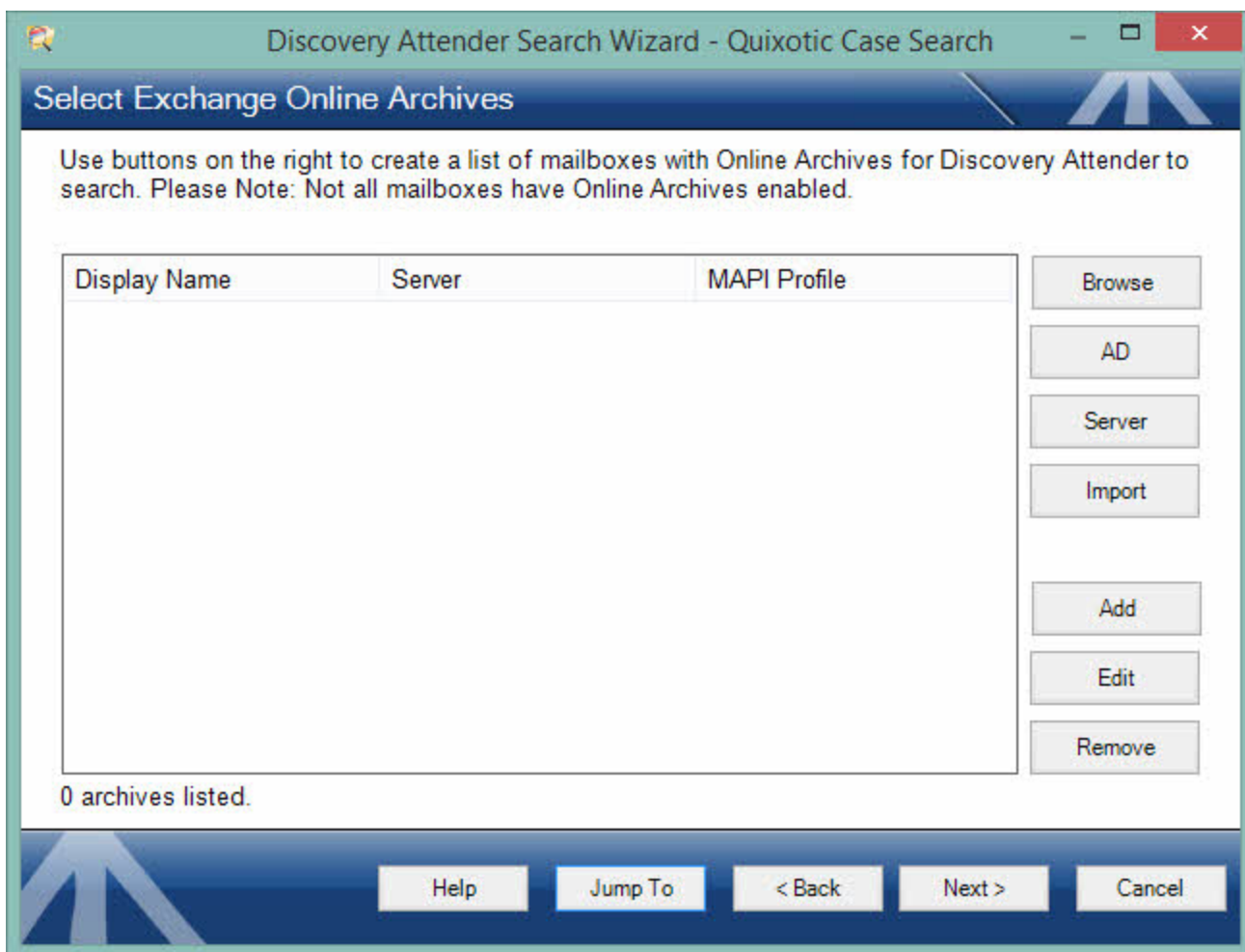
See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Select Exchange Online Archives

This screen will appear when you select **Online Archives** on the [Specify Exchange Data Stores](#) page.

Note: This Online Archives selection is meant to select archives from on-premises Exchange servers accessed by MAPI protocol. It is only available in Exchange versions 2010, 2013 and 2016. For all other versions, EWS must be selected from the [Specify Exchange Data Stores](#) page.



Description

This page allows the user to search Online Archives found in Exchange 2010 or later. These data stores are enabled by administrators and may not be available for all users.

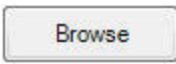

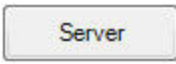
Please note:

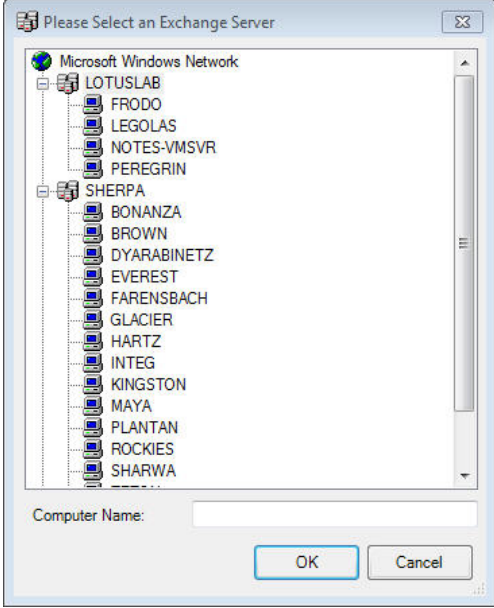
- It is possible to enter accounts that do not have Online Archives. If this occurs, and the selected account does not have an accessible Online Archive, then the associated task will return an error when the search is run.
- As Online Archives are a specialized form of a Mailbox, the entry forms and dialog boxes mimic those for entering Mailbox details.

Columns

	Description
Display Name	Name of the Online Archive
Server	Server where the Online Archives are found.
MAPI Profile	<p>You will need to use a <i>Master MAPI profile</i> for access. This profile can be set in two ways. The first is to set the value individually, per mailbox using the Add or Edit buttons. The second method is to use the <i>Settings Connections options</i> to designate a default profile to use in all instances. In this case, the profile may not show up in this list once the archive is selected, but it will still be used.</p> <p>Note: Earlier versions of Exchange do not require profiles to be created for access.</p>

Buttons

	Description
	Allows the user to browse the Global Address List (GAL) for Online Archive to add to the list.
	Allows users to query Active Directory for Online Archive to add to the list.
	Allows users to query Exchange servers to add all Online Archive from a selected server to the mailbox list.

	 <p>Select the server that contains the Online Archive to include in your search, then click OK. If the server is not listed, or you cannot navigate to it, try entering the fully qualified server name in the Computer Name section. Alternately, try using Active Directory.</p> <p>Note: Hidden and System data stores are not searchable via <i>Discovery Attender</i>. However, they can be added when selecting the entire server with this feature. Please make sure you review the entire list for non-searchable data stores before continuing. If non-searchable stores are included in the search, those tasks will fail with access errors.</p>
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Import

Allows the user to import a list of Online Archives from a .csv or .txt file.

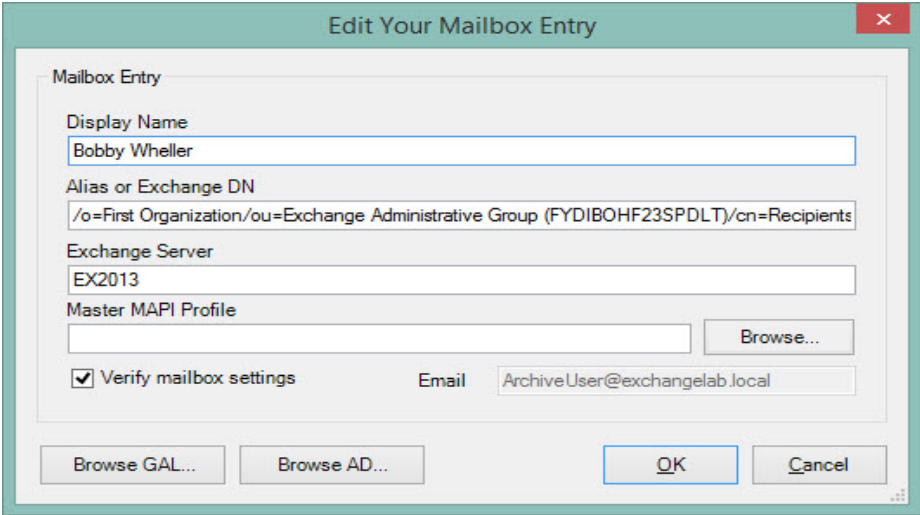
Add

Allows the user to add a new Online Archive by entering the credentials one by one in the [Edit Mailbox Entry](#) dialog.



Edit

Allows the user to edit a selected Online Archive by accessing the [Edit Mailbox Entry](#) dialog.

	
<input type="button" value="Remove"/>	Removes the selected Online Archive from the list.

Context Menu

	Description
Select All	Selects all items in the list
Remove	Removes the selected Online Archive
Export	Exports the list of Online Archives
Export to Text	...to a text file
Export to CSV	...to a .csv file (which can be opened in Excel)
Import	Imports a list of Online Archives from a file. See Import Format Page for more detail.

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Configure Public Folder Mailbox

This screen will appear when you select **Public Folders** on the [Specify Exchange Data Stores](#) page.

Discovery Attender Search Wizard - Quixotic Case Search

Configure Public Folders Mailbox

Discovery Attender searches Public Folders using an Exchange Mailbox. Use the buttons on the right to choose a mailbox that has enough permission to access the Public Folders which will be searched.

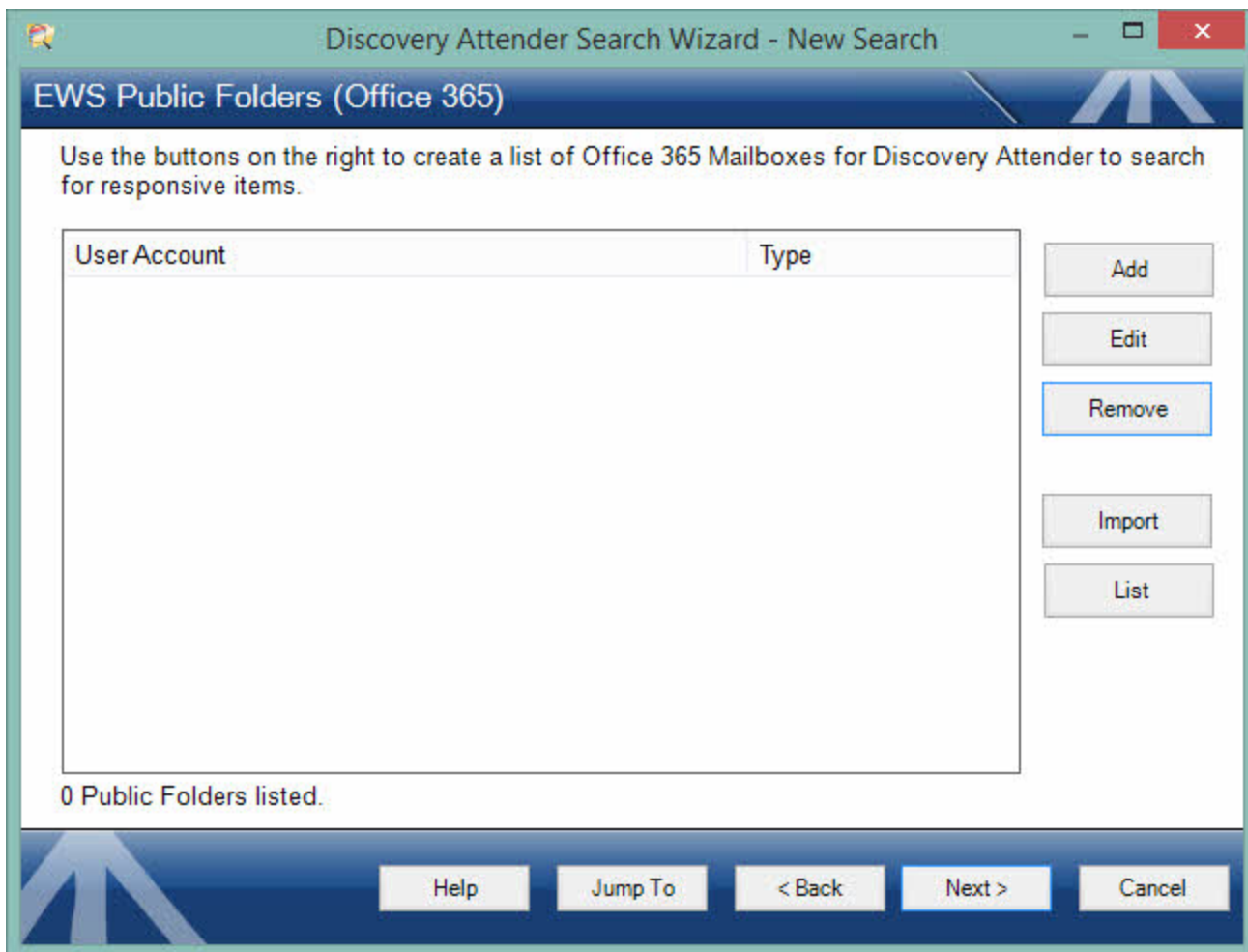
Select a Mailbox

Display Name:	Administrator	Browse
Server Name:	ex2010.exchangelab.local	Change
DN or Alias:	/o=First Organization/ou=Exchange Administrative Group (FYDIBOHF23SPDLT)/cn=Recipients/cn=Administrator	AD

Verify Access to this Mailbox

Help Jump To < Back Next > Cancel

Note: A variation of this form(see below)will appear if you are searching EWS Public Folders. In this case, you will choose just one EWS mailbox to add for access to Public Folders. See the [Select EWS Data Store](#) page for more details.

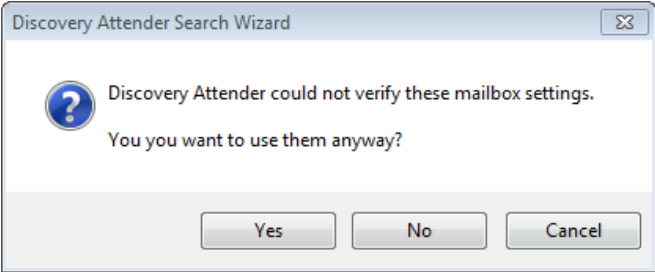


Description

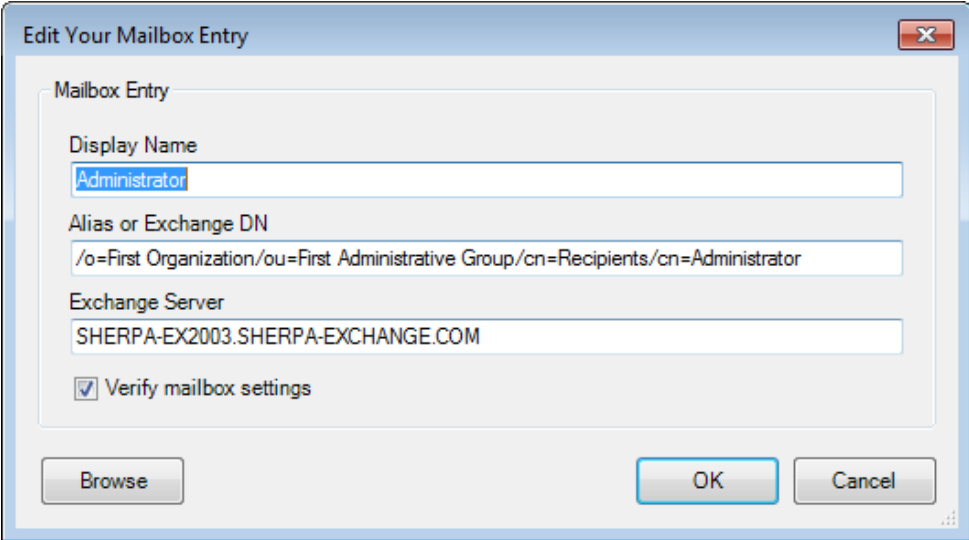
Public Folders are repositories of data which can be viewed by a number of different user accounts. These folders can only be accessed via a mailbox with appropriate permissions. This screen will let you enter the mailbox that will be used to access your public folders. Once a mailbox is selected, Discovery Attender can access any Public Folder to which the selected mailbox has access.

Options

	Description
Display Name	Visible name attribute of an Exchange Mailbox.
Server Name	Name of the Exchange server where the mailbox is located.
DN or Alias	Shows the Distinguished Name of the Exchange mailbox (as shown above), or the Alias (unique nickname) for the Exchange Mailbox.

<p>Verify Access to this Mailbox</p>	<p>Check this option to test access to the mailbox. If the settings could not be verified, the following message will appear:</p> 

Buttons

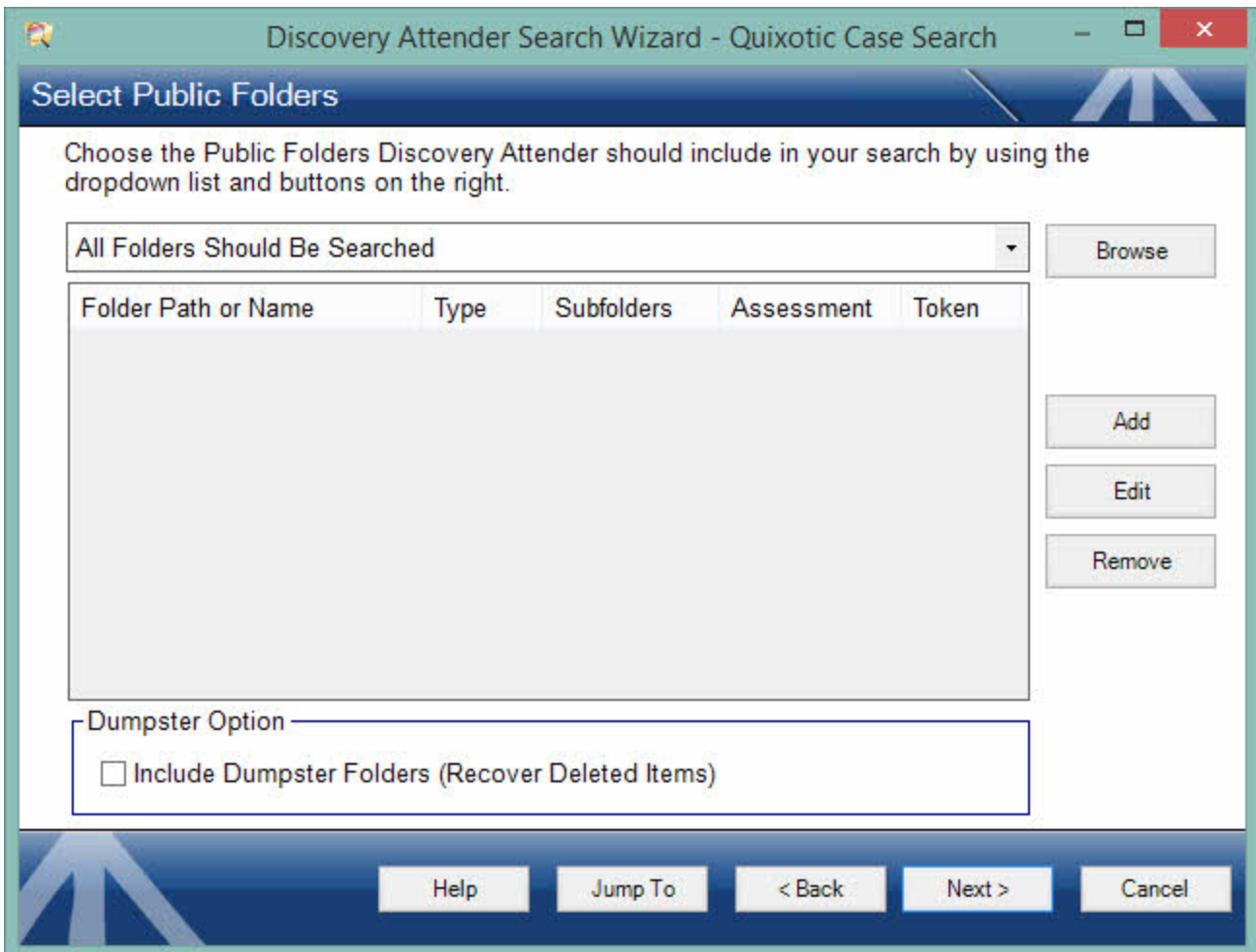
	Description
<p>Browse</p>	<p>Browse for the configuration mailbox from the Global Address List (GAL).</p>
<p>Change</p>	<p>The following dialog appears to change the details for the selected mailbox:</p> 
<p>AD</p>	<p>Allows users to query Active Directory to select the appropriate mailbox.</p>

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Select Public Folders

This screen will appear when either **Public Folders** or **EWS Public Folder (Office 365)** are chosen in the [Specify Exchange Data Stores](#) page.



Description

This screen is used to select specific Public Folders to include in the search. By default, all Public Folders are included. To select specific folders, use the drop down box and buttons to refine your choices.

To successfully select and search Public Folders, you must first [select a mailbox](#) which has full permissions to the Public Folders being searched. In the case of [EWS data stores](#), the mailbox needs to have connectivity and rights to the Public Folders being searched.

Options

All Folders Should Be Searched
 Only The Folders Listed Below Will Be Searched
 All Folders Except Those Listed Below Will Be Searched

	Description
All Folders	All Public Folders will be searched, no further action is needed (default).
Only The Folders Listed Below	Use the buttons to the right to select the Public Folders to be searched. Only the selected folders will be searched, items in all other folders will be excluded.
All Folders Except Those Listed Below	Use the buttons to the right to select Public Folders to be excluded from your search. No messages in the selected folders will be searched.
Include Dumpster Folders	Do you want to include the Recovery Deleted Items, a.k.a. the Dumpster for the Public Folder in this search? This can add time to the search.

Columns

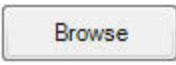
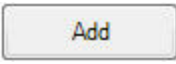

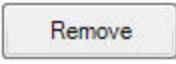
If the user is including or excluding certain folders, the list view will be enabled.

Folder Path or Name	Type	Su...	Assessment	Token
%ALL-PUBLIC-FOLDERS%HR	Name	Yes	Like Pattern	Yes
Sales	Name	Yes	Like Pattern	
\All Public Folders\Chopin	Path	Yes	Exactly As Entered	
\All Public Folders\Jane Smith	Path	Yes	Exactly As Entered	
\All Public Folders\john anderson	Path	Yes	Exactly As Entered	
\All Public Folders\Sales	Path	Yes	Exactly As Entered	
\All Public Folders\Security	Path	Yes	Exactly As Entered	
\All Public Folders\Shipping	Path	Yes	Exactly As Entered	

	Description
Folder Path or Name	Name of the folder
Type	Name or Path. This describes how the Public Folder listed will be evaluated. If a Name , then any folder matching that specific <i>name</i> will be searched. For Path , then any folder within that <i>path structure</i> will be searched.

Subfolders	Records whether the sub-folders of the selected folder will be searched
Assessment	How the folder name will be evaluated. If it will be evaluated as a pattern (either wild-cards (Like) or Regular Expression), or exactly as entered.
Token	Yes or No. Should this folder name be resolved as a pre-defined folder token? Tokens are designated by a percent sign (i.e. %) and are predefined values.

Buttons

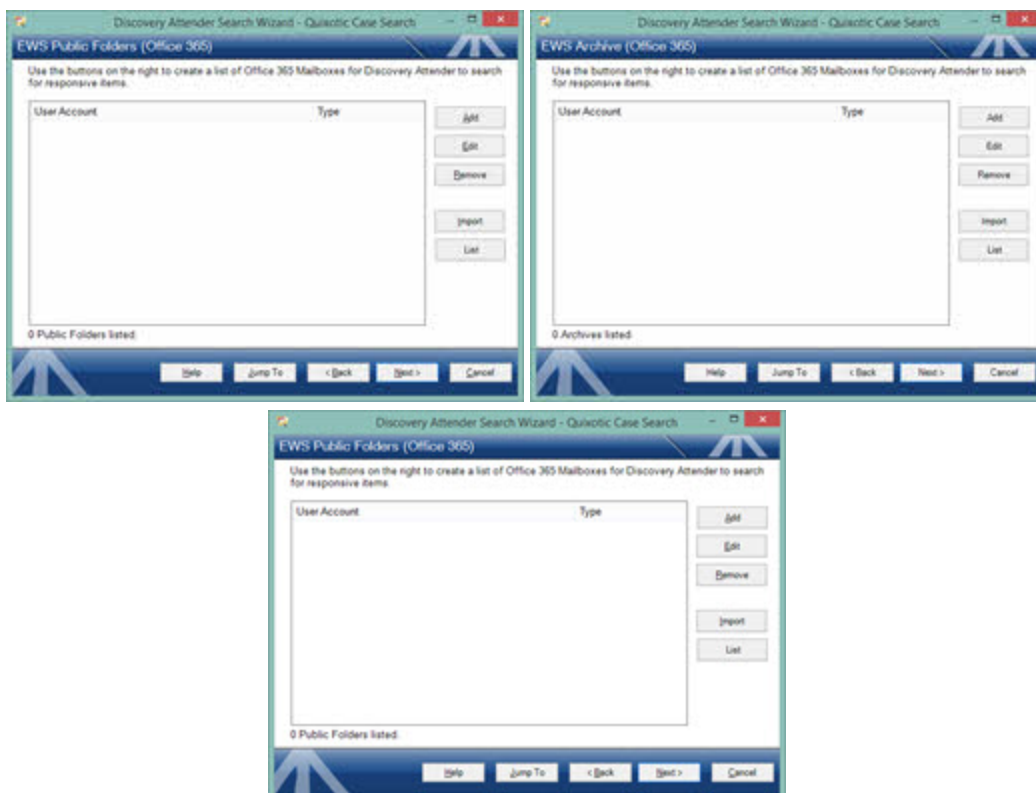
	Browse for folders using the Choose Public Folders to add to the list using your default profile.
	Opens the Edit Folders dialog for a user to add a custom Public Folder value.
	Opens the Edit Folders dialog for a user to edit the values of a selected Public Folder.
	Removes the selection from the list.

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Select EWS (Office 365) Data Stores

A version of this screen will appear when you select an option to search any EWS (Office 365) data stores such as **EWS Mailbox, Online Archive or Public Folder** on the [Specify Exchange Data Stores](#) page.



Description

This screen allows you to create and edit a list of data stores located on Microsoft EWS connected servers (such as Office 365) to include in the search. Use the buttons on the right to add the specified data store to the text list.

Discovery Attender uses Exchange Web Services (EWS) to access data stores on Office 365 and some on premises Exchange data stores. To successfully select and search these data stores, the credentials entered (see below) must have permissions to the data stores being searched. All types of EWS data stores that *Discovery Attender* searches (Mailboxes, Online Archives and Public Folders) are accessed via mailbox name.

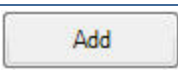
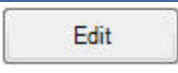
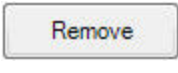
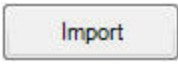
Please make sure you test these mailboxes for connectivity (see [Adding Office 365 Mailboxes](#) dialog) to ensure you have access before starting the search.

Please note: Accessing EWS based data stores such as Office 365 mailboxes over the Internet can be very slow. An alternative is to export the EWS data stores to PST files using the [PreSearch Tool](#), then search the generated PST file.

Columns

	Description
User Account	Full name of the EWS (Office 365) data store to include in the search (e.g. tuser-@sherpasoftware.com). Mailboxes, Online Archives and Public Folders will all use the account (i.e. mailbox) name for access.
Type	The type of access to this account. <ul style="list-style-type: none">• Default: This option will use the default delegation (i.e. impersonation) settings at listed in the EWS Office 365 Settings page.• Direct: The mailboxes will be accessed directly with the supplied password.• Impersonated: An alternate delegated account is used to access the account.

Buttons

	Opens the entry form for a user to add an EWS (Office 365) Mailbox.
	Opens the entry form for a user to edit the selected EWS (Office 365) Mailbox.
	Removes the selection from the list.
	Imports a list of EWS (Office 365) Mailboxes in .txt or .csv format. See Import Format Page for more detail.

List	<p>Imports a list of mailboxes from a previously generated powershell export using the Settings EWS list option.</p> <p>Please note: The option to regenerate the list may take some time. It is far better to generate the list first using the settings, then use the same list for all your entries.</p>
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Context Menu

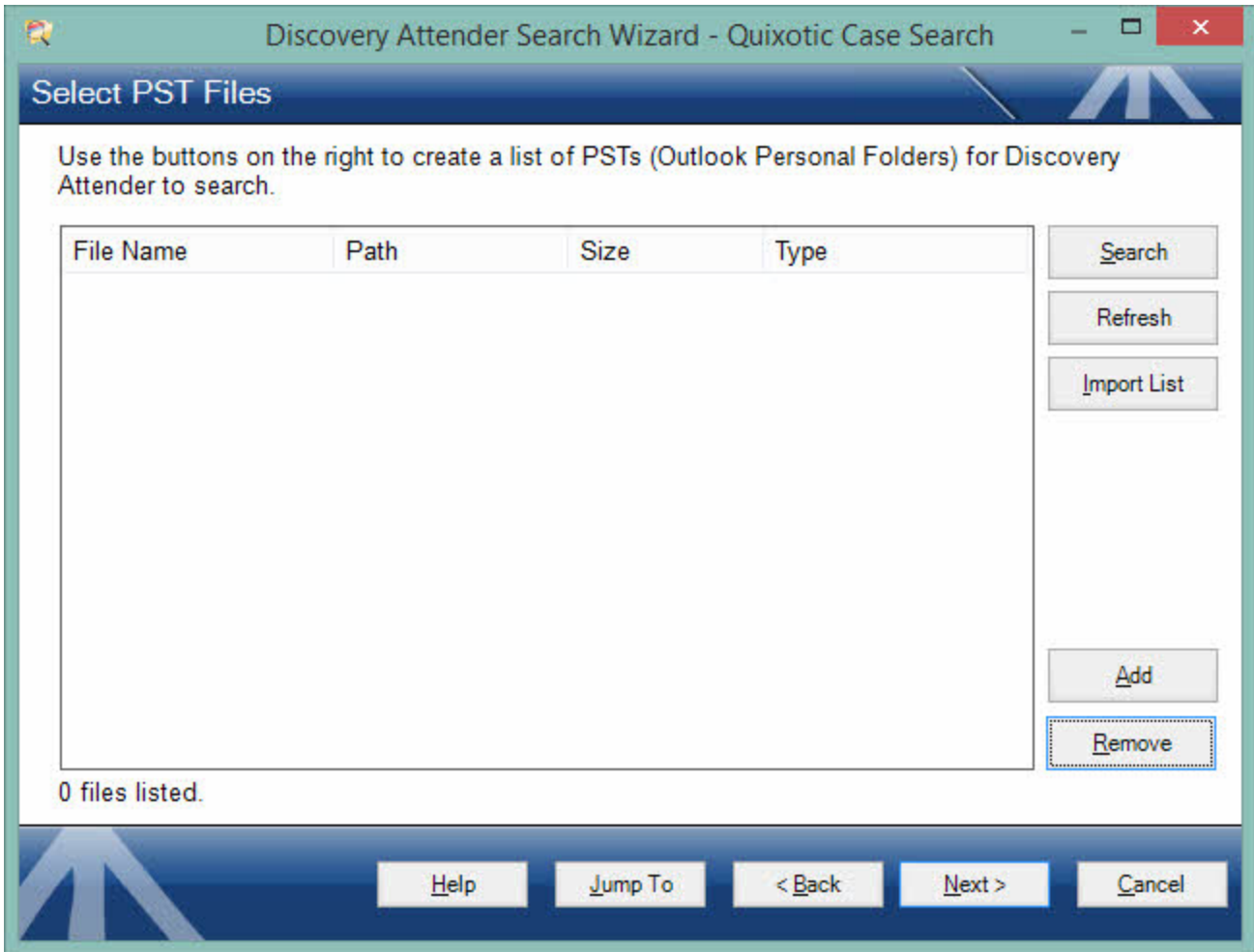
Title	Description
Select All	Selects all items in the list
Remove	Removes the selected mailbox
Export	Exports the list of mailboxes
<i>Export to Text</i>	to a text file
<i>Export to CSV</i>	to a .csv file (which can be opened in Excel)
Import	Imports a list of mailboxes from a file. See Import Format Page for more detail.

See Also

- [EWS \(Office 365\) Settings](#)
- [Add/Edit EWS Office 365 Mailboxes](#)
- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Select PST Files

This screen will appear when you select *Outlook Personal File Folders (PSTs)* on the [Select Areas to Search](#) page.



Description

Use this page to choose the PST files to include in your search. In addition to the local machine, PSTs on file servers, laptops or desktops can also be searched as long as the following conditions are met:

- The PST is not being actively used.
- The installation machine has connectivity to the PST location
- The login account has full permissions to search the PST location.
- The PST is actually an Outlook Personal Folders file.

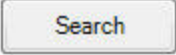
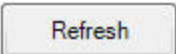
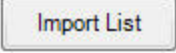
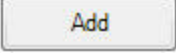
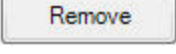
Discovery Attender requires read/write access to search PST files. PSTs stored on certain media (such as read-only CDs) will need to be moved to a readable directory before searching can begin.

Columns

	Description
File	Name of the PST file.

Name	
Path	Location where PST file was found.
Size	Size of the PST file at the time it was entered into the list.
Type	If the PST is accessible, this column will list the format of PST file (ASCII or Unicode). If access to the PST is not possible, the entry will be listed in red. The reason the PST could not be accessed will be in parenthesis (e.g. (Not a valid PST) or (File in Use)). Once you amend the situation, use the Refresh button to verify that access has been established.

Buttons

	Opens a dialog that allows users to search network shares or hard drives to find all PST files stored in that location. See Search PSTs for more information.
	Refreshes the list of PST files. This is useful to verify any change in status for the PSTs.
	Allows the user to import a previously created list of PST files from a specially formatted csv or .txt file.
	Allows the user to navigate to a path and select PST files to add to the list.
	Removes the selected PST files from the list.

Context Menu

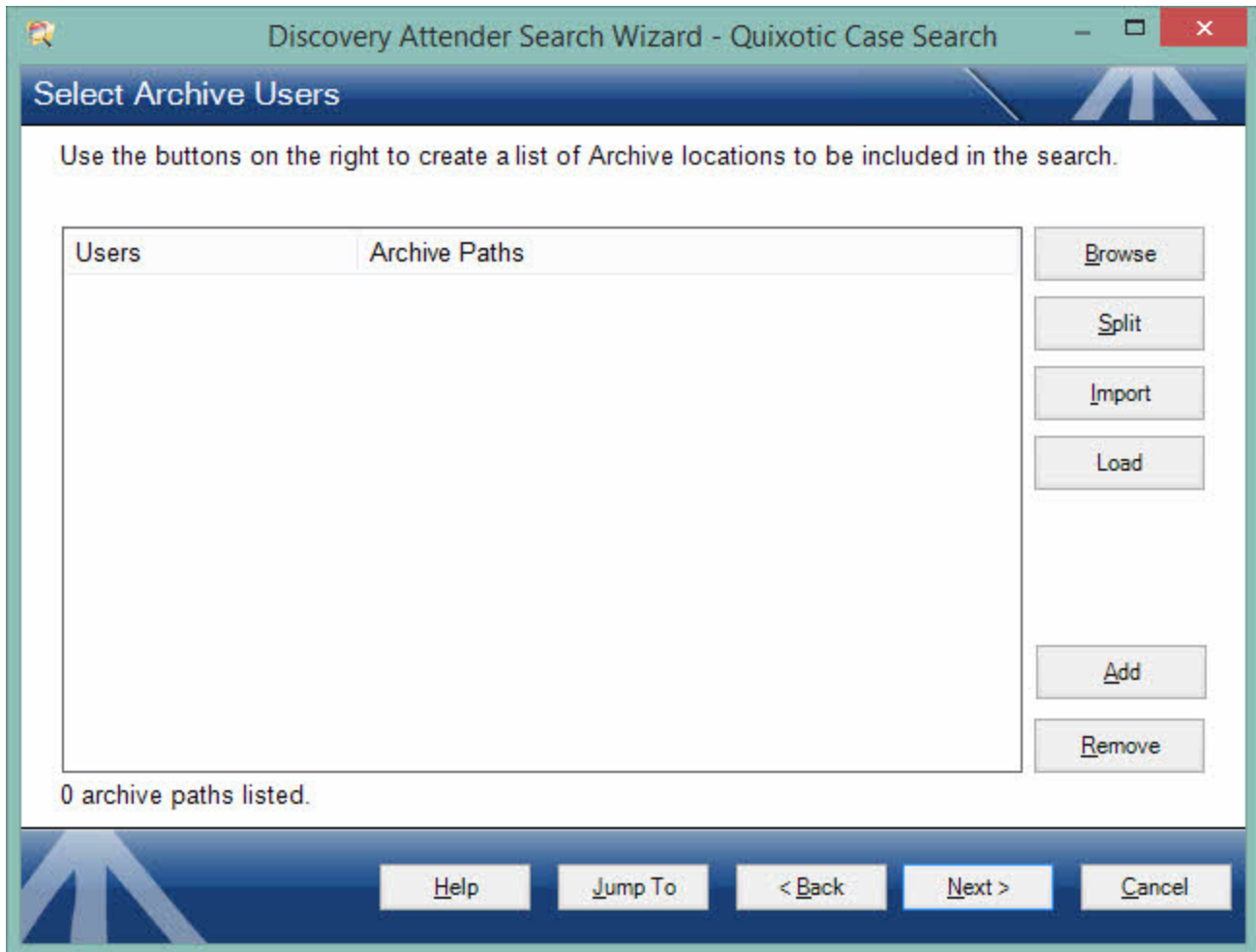
	Description
Select All	Selects all items on the list
Export	Exports the list of PSTs
Export to Text	... to a text file
Export to CSV	...to a .csv file (which can be opened in Excel)
Import	Imports a list of PSTs from a specially formatted file. See Import Format Page for more detail

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Select Archive Users

This screen will appear when you select **Archives (Requires Sherpa Software's Archive Attender)** on the [Specify Other Email Stores](#) wizard page.



Description:

Use this wizard screen to populate a list of the archive users to include in the search. To successfully choose users, you will need to know where the archives are located.

If your archives are not user specific, you can still use this screen to enter your archive locations. Simply follow the same directions, and make sure you use the **SPLIT** button to make the search more efficient.

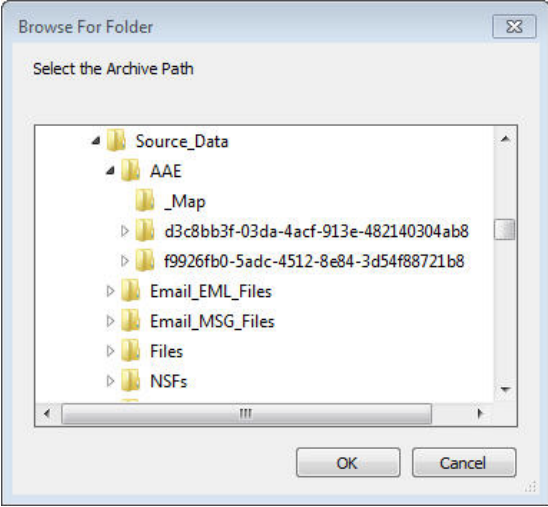
Please note:

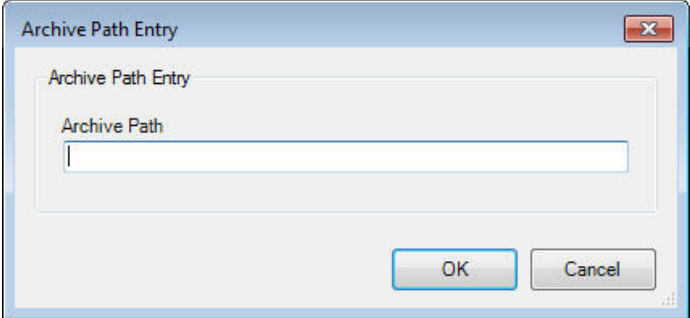
- The option is for searching archives created with Sherpa Software's Archive Attender only.
- Discovery Attender can search Archive Attender archives without an installation of Archive Attender on the installation computer.
- To search archives created with Outlook, select the **Outlook Personal Folders (PST File) option**. Exchange Online Archives are searched using the **Online Archives option** . For all other archive stores, check with your software provider for searching functionality.

Columns

	Description
Users	Name of the archive users, or designation of the archive location folder
Archive Paths	Location where the user archives are found.

Buttons

Browse	Opens a browse dialog box allowing you to navigate to a single archive location.
	
Split	Breaks up the selected path into its first level directories. This is very helpful in making your search more efficient by adding more tasks to the process queue.
Import	Imports a list of archive users. This file can be generated by using the context menu to export the list of users to a CSV file .
Load	Opens the Select Archive Users dialog form which allows you to select users from multiple archive user locations.
Please note: This list of archive locations can be created in the Settings .	

Add	Allows you to add the path to an individual archive location using the <i>ARCHIVE PATH ENTRY</i> dialog box:
	
Remove	Removes the selected items from the Archive Users list.

Context Menu

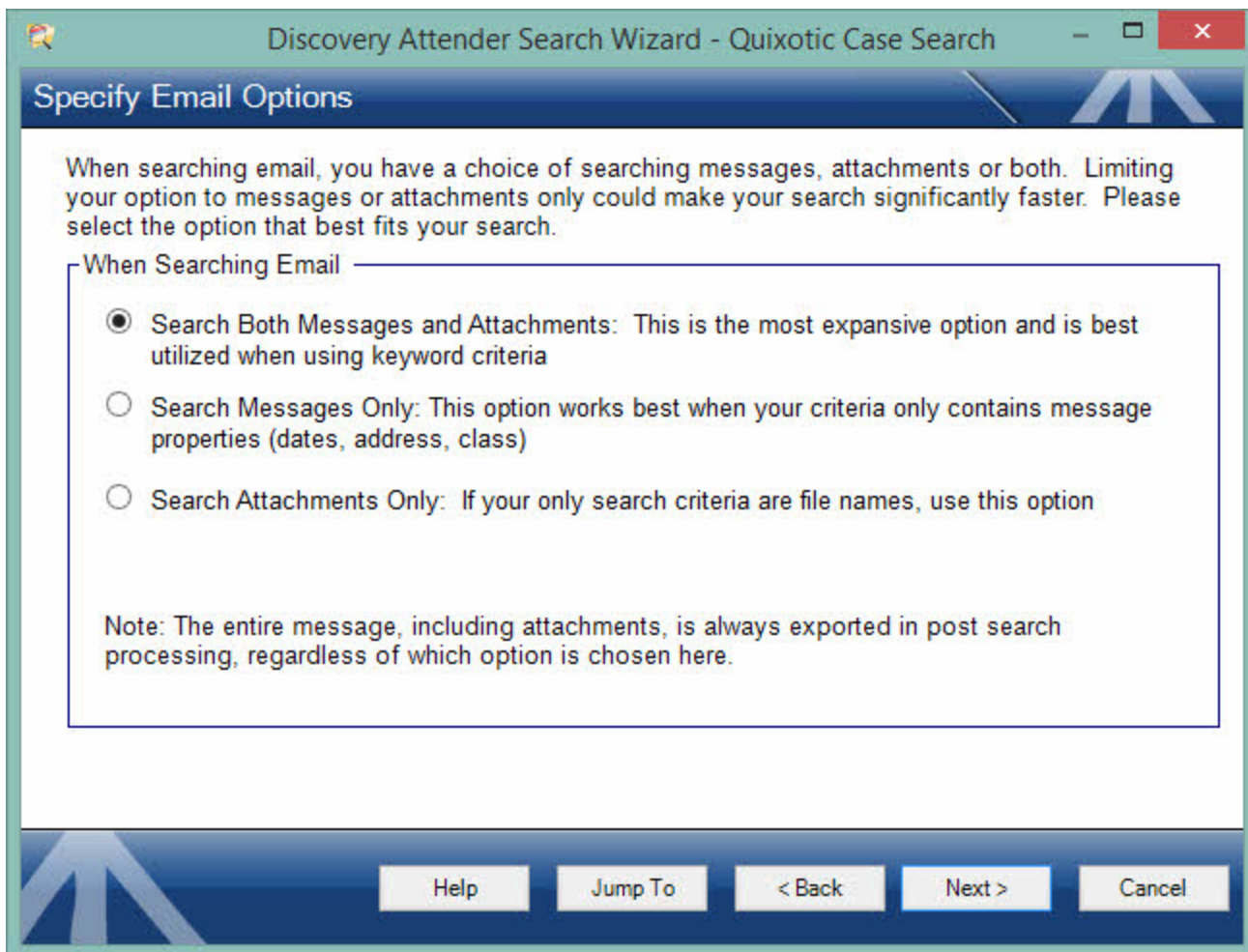
	Description
Select All	Selects all users in the list
Remove	Removes the selected users from the list
Export	Exports the list of archive users
<i>Export to CSV</i>	...to a .csv file which can be opened in Excel or re-imported to this wizard screen
Import	Imports a list of archive users from a file previously created with the export option

See Also

- [Archive Attender Summary](#)
- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Specify Email Options

This screen will appear when searching messages from email based data stores.



Description

This page allows the user to choose whether the search should encompass message content only, attachment content only, or both. It is used to help make the search more efficient.

Please note: Regardless of the setting chosen on this screen - attachments are always exported with source messages. This maintains the context of parent-child relationship.

Options

	Description
Search Both Messages and Attachments	Both messages and attachments will be searched with criteria available for both types. This is best option if a search contains keyword criteria.
Search Messages Only	Only messages will be searched with criteria available for messages only.

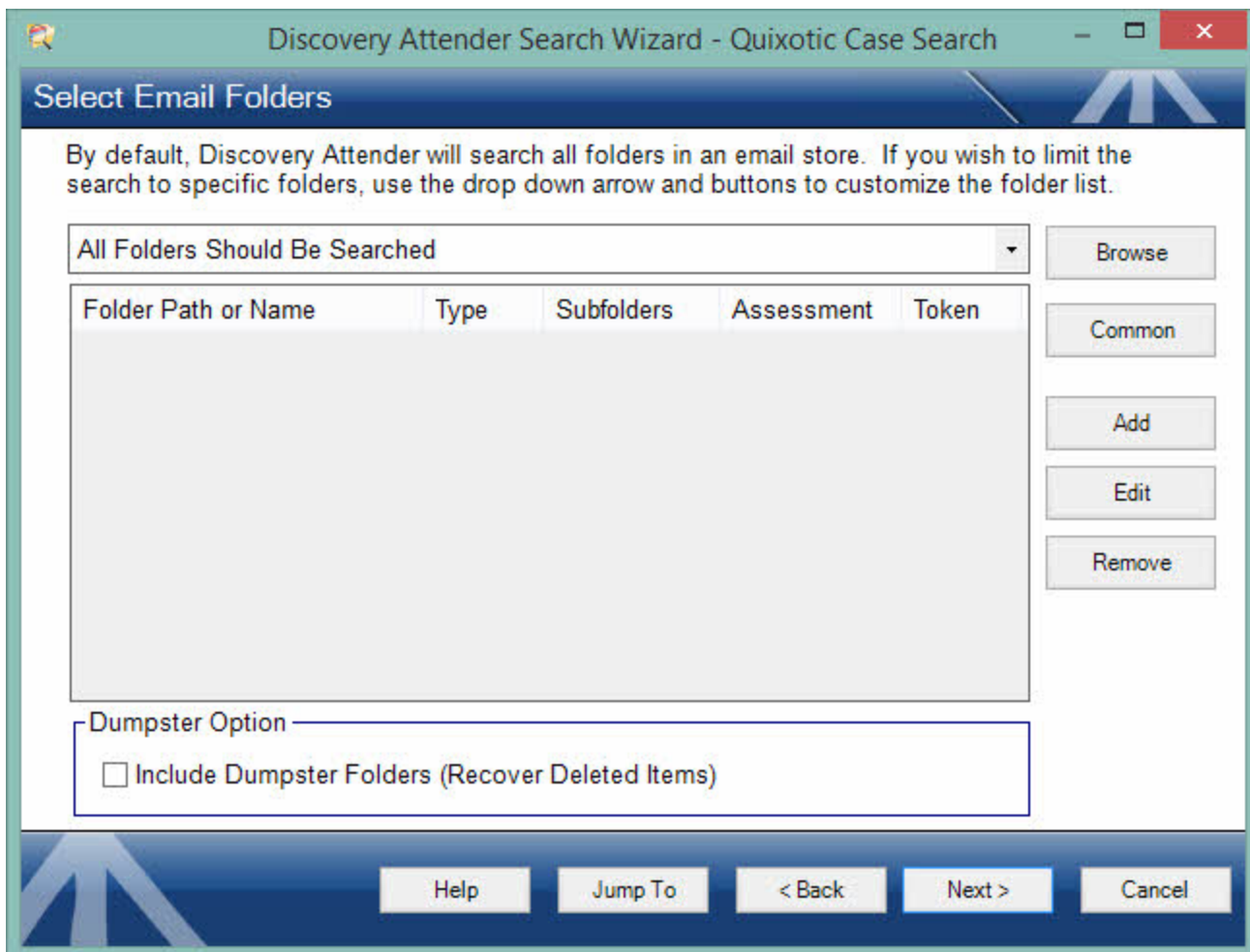
	<p>Choosing this option will speed up the search significantly if only date, address or message type criteria is being used.</p> <p>This is best when searching only for message criteria, such as addresses or dates.</p>
Search Attachments Only	<p>Only the attachments will be searched. This is most effective when searching for file names only criteria.</p>

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Select Email Folders

This screen will appear when email in Mailboxes, Online Archives, PST files, Archive Attender archives, or EWS (Office 365) data stores is being searched.



Description

This screen allows you to select specific folders to search in your mail stores. By default all folders found in the data store are searched. However if you wish to limit your search to standard folders (e.g. [Sent Items](#) or [Deleted Items](#)) or custom folders (e.g. [Project X](#)), this is the screen. Use the drop down box and buttons to specify the folders to include or exclude from your search.

This page also defines whether or not to include the Dumpsters as part of your search of Microsoft Exchange Server based data.

- Dumpsters are also known as the Recover Deleted Items. They are enabled by the Exchange administrators but may not be present in all environments.
- Microsoft has added significantly to the functionality of the Recoverable Items (previously known as the Dumpster). In addition to its task as a recovery folder, the Dumpsters are also used to support built in Litigation Hold and retention functionality in O365 or on-premises Exchange servers.
- Always test this functionality before deploying a dumpster search on a large number of locations. Some anti-virus and administrator settings prevent *Discovery Attender* from searching or exporting items from these stores.

Options

	Description
All Folders	All email folders will be searched, no further action is needed (default).
Only The Folders Listed Below	Use the buttons to the right to select folders to be searched. Only these folders will be searched, messages in other folders will be excluded.
All Folders Except Those Listed Below	Use the buttons to the right to select folders to be excluded. No messages in these folders will be searched.
Include Dumpster Folders (Recover Deleted Items)	Do you want to include the Recovery Deleted Items, a.k.a. the Dumpster? This option is only enabled if you are searching Mailboxes. Note: Searching Dumpsters adds significant time to the search, and not all Exchange servers support this functionality. Be sure to test access to Dumpsters first by running a sample search before selecting this option.

Columns

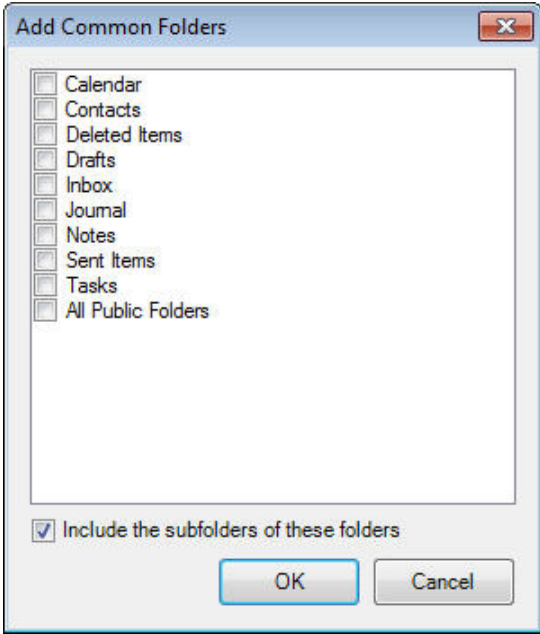
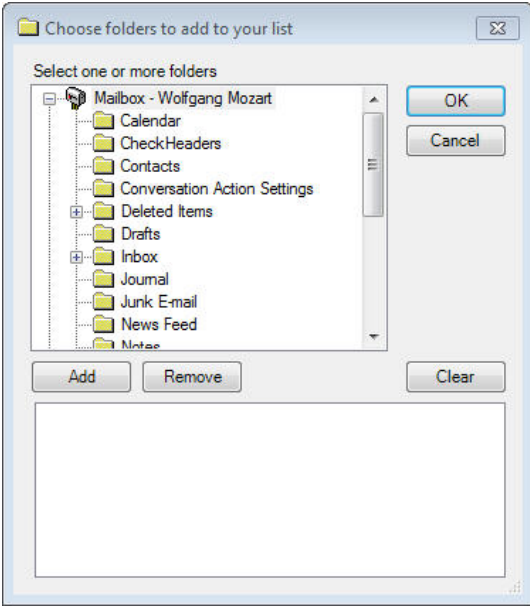
If the user is including or excluding certain folders, the list view will be enabled.

Folder Path or Name	Type	Subfolders	Assessment	Token
Sales	Name	Yes	Like Pattern	
\%DELETED-ITEMS%	Path	Yes	Exactly As Entered	Yes
\%INBOX%	Path	Yes	Exactly As Entered	Yes
\%NOTES%	Path	Yes	Exactly As Entered	Yes

	Description
Folder Path or Name	Name of the folder
Type	Name or Path, describes how the folder will be evaluated. If a Name, then any folder matching that <i>name</i> will be searched, if a Path, then any folder within that <i>path structure</i> will be searched.
Subfolders	Records whether the sub-folders of the selected folder will be searched
Assessment	How the folder name will be evaluated, whether it will be evaluated as a pattern (either Like or RegEx), or exactly as entered.
Token	Yes or No. Should this folder name be resolved as a pre-defined folder token? Note: Unless choosing folders from the 'Common' folder list, do not enable this option.

Buttons

Common	List of common folders to use to add to the list:
--------	---

	
<p data-bbox="224 863 394 915">Browse</p>	<p data-bbox="423 856 1109 888">Browse for folders to add to the list using your default profile.</p> 
<p data-bbox="224 1541 394 1593">Add</p>	<p data-bbox="423 1535 1206 1566">Opens the Edit Folders dialog for a user to add a custom folder value.</p>
<p data-bbox="224 1625 394 1677">Edit</p>	<p data-bbox="423 1619 1304 1650">Opens the Edit Folders dialog for a user to edit the values of a selected folder.</p>
<p data-bbox="224 1709 394 1761">Remove</p>	<p data-bbox="423 1703 776 1734">Removes a folder from the list.</p>

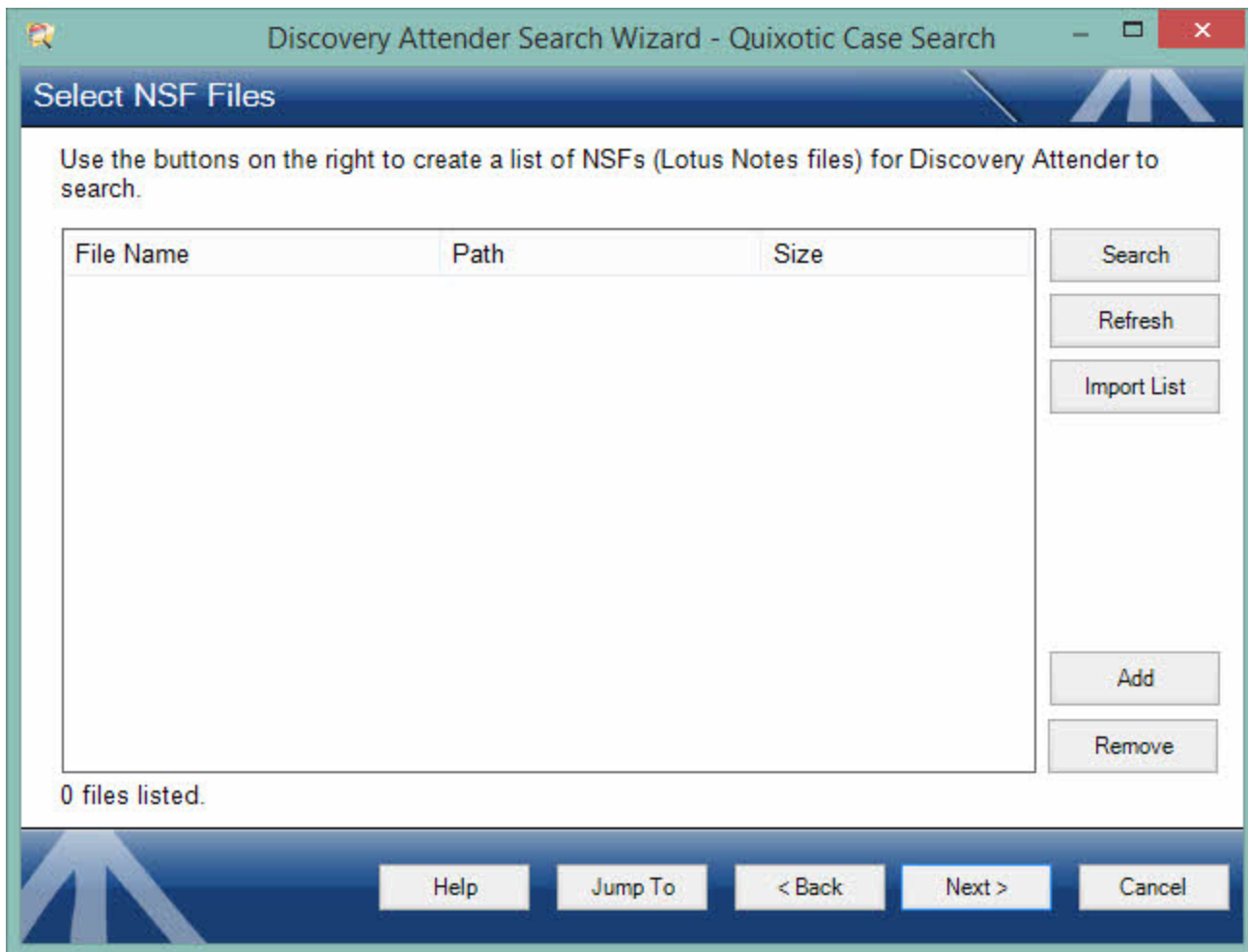
-

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Select NSF Files

This screen will appear when you select **Lotus Notes Mail Files (NSFs)** on the [Specify Other Email Stores](#) wizard page.



Description

This page allows the user to enter Lotus Notes mail files (.NSF files) that you wish to include in the search. Use the buttons on the right side of the screen to choose NSF files to include in the list.

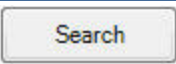
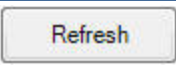
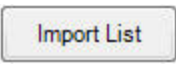
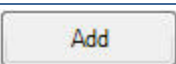
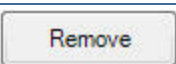
Please note:

- Entries listed in red cannot be searched due to access or other issues.
- *Discovery Attender* is not able to search Notes applications outside of email. Other important details for NSF searching can be found in the NSF File Searching [summary](#).

Columns

	Description
File Name	The name of the NSF file.
Path	The file path(s) indicating the location of the selected file(s).
Size	The size of the selected file(s).

Buttons

	Description
	Opens a Search for Mail Files dialog box that scans chosen directories, computers or file shares for NSF files to include in the search.
	Refreshes the list of NSF files. This is useful to verify any change in status for the NSF files.
	Allows the user to import a list of NSF files from a .csv or .txt file.
	Allows the user to specify individual NSF mail files one by one.
	Removes the selected mailboxes from the list.

Context Menu:

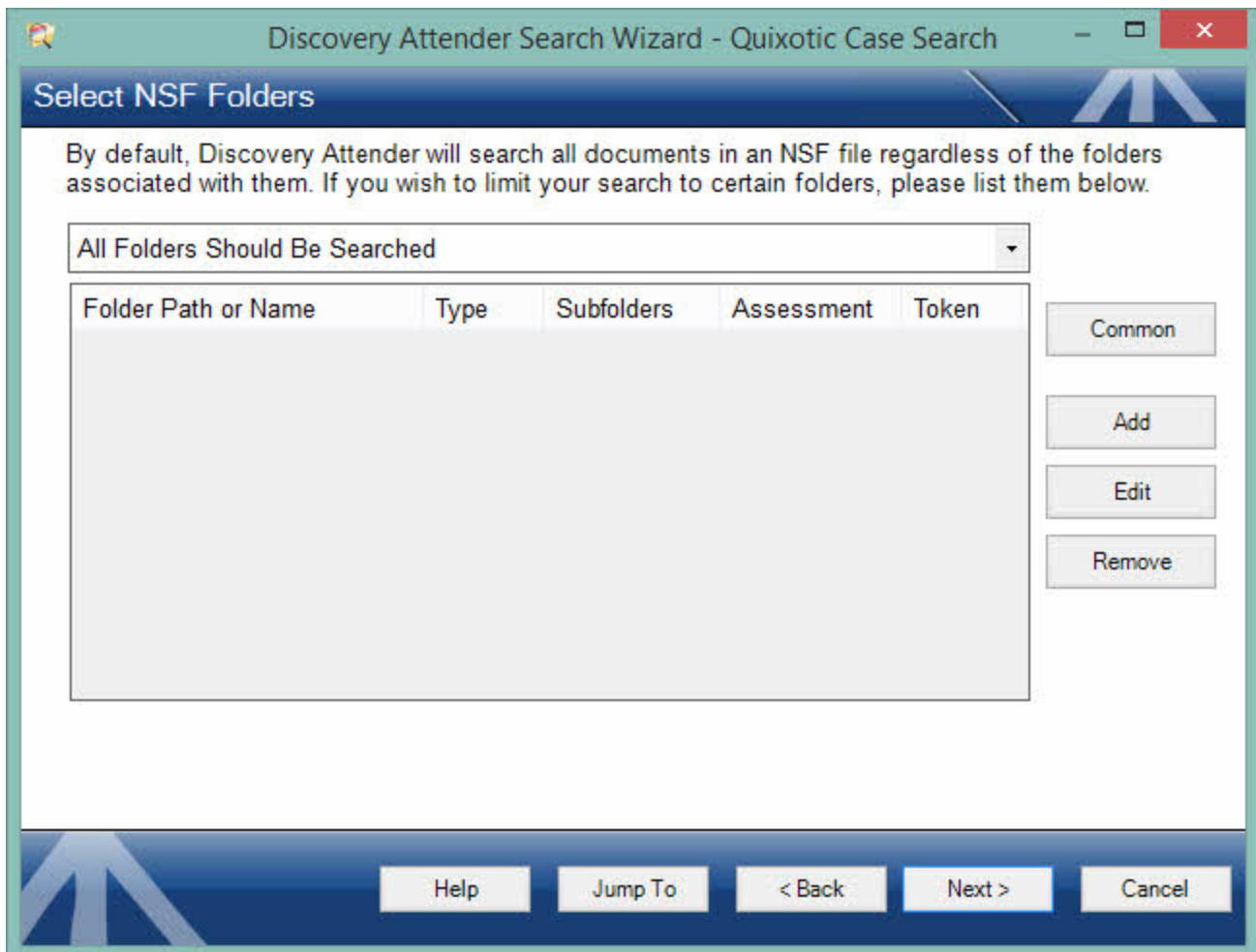
	Description
Select All	Selects all items on the list.
Remove	Removes the selected File Path
Export	Exports the list of File Paths
Export to Text	...to a text file.
Export to CSV	...to a .csv file (which can be opened in Excel).
Import	Imports a list of File Paths from a file. See Import Format Page for more detail.

See Also

- [NSF File Summary](#)
- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Select NSF Folders

This screen will appear when email is searched in Lotus Notes mail files as selected in the [Specify Other Email Stores](#) wizard page.



Description

This screen allows you to select specific folders to search in Lotus Notes mail files.

Please note:

- Folders in NSF mail files are similar to views in other applications. The most important thing to remember is that in a Lotus Notes Mail file, the same message can be in multiple views.
- There is also a default folder/view called **All Documents** which contains every item in the NSF file.

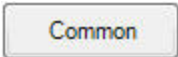
Options

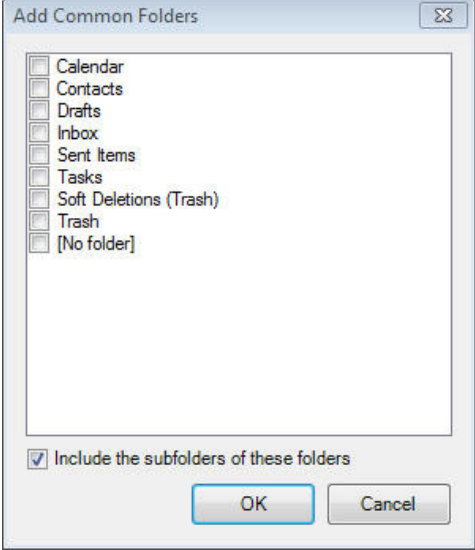
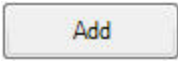
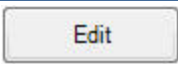
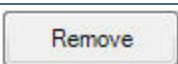
	Description
All Folders	All folders will be searched, no further action is needed (default).
Only The Folders Listed Below	Use the buttons to the right to select folders to be searched. Only the selected folders will be searched, messages not present in the selected folder will be excluded.
All Folders Except Those Listed Below	Use the buttons to the right to select folders to be excluded. No messages in these folders will be searched.

Columns

	Description
Folder Path or Name	Name of the folder
Type	Name or Path, describes how the folder will be evaluated. If a Name, then any folder matching that <i>name</i> will be searched, if a Path, then any folder within that <i>path structure</i> will be searched.
Subfolders	Records whether the subfolders of the selected folder will be searched
Assessment	How the folder name will be evaluated, whether it will be evaluated as a pattern (either Like or RegEx), or exactly as entered.
Token	Yes or No. Should this folder name be resolved as a pre-defined folder token?

Buttons

	Opens a dialog box containing a list of common Lotus Notes mail folders.
---	--

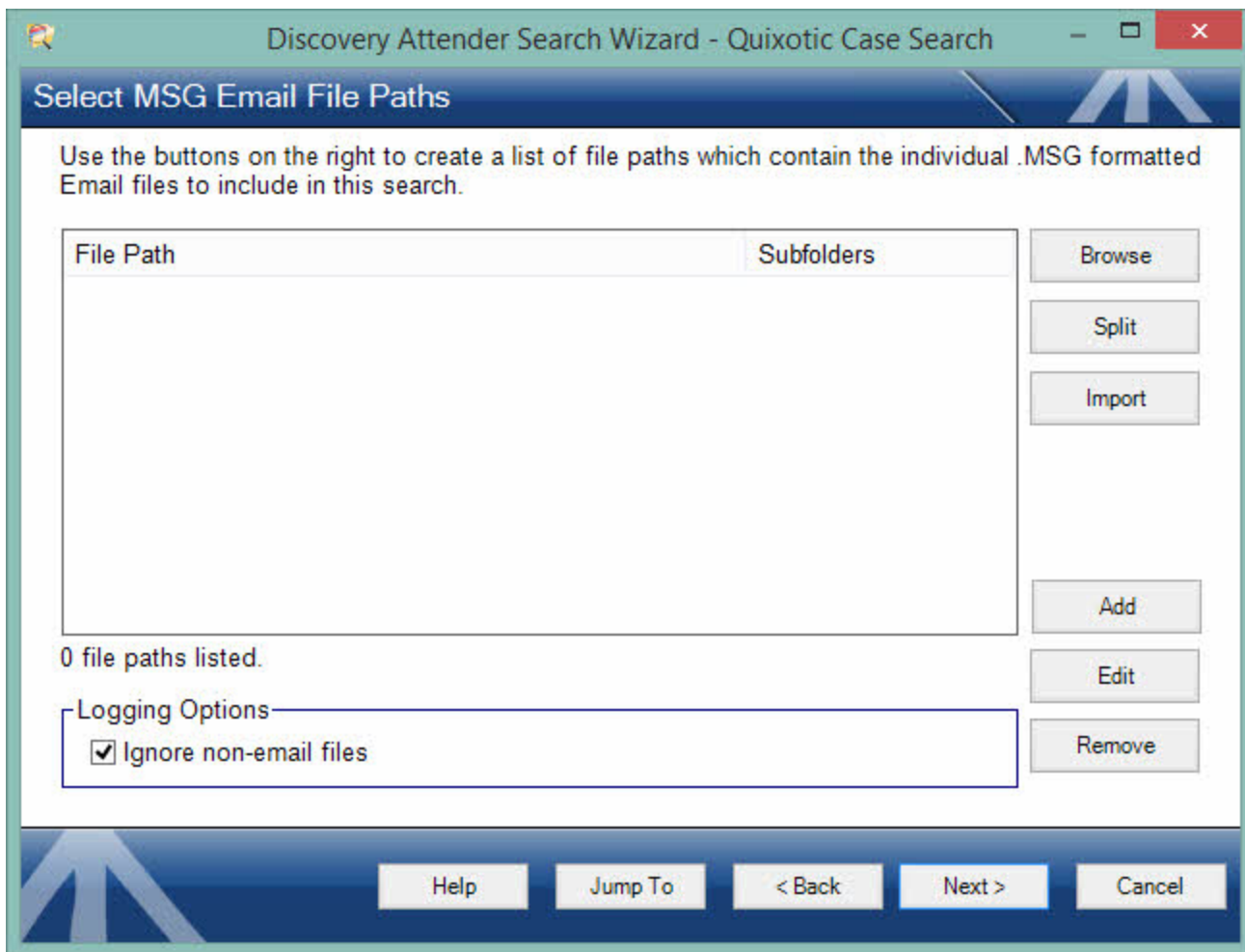
	
	Opens the Edit Folders dialog box for users to add specific custom folder entries not found on the common folder list.
	Allows the user to edit a selected folder using the Edit Folders dialog box.
	Removes the selected folder from the list.

See Also

- [NSF Summary](#)
- [Main Console](#)
- [Table of Contents](#)

Search Wizard: Select MSG Email File Paths

This screen will appear when you select **Outlook Mail Messages (MSG files)** or **Standard Email Files (MIME) (.EML Files)** on the [Specify Other Email Stores](#) wizard page.



Description

Discovery Attender can search .MSG files as files or email. When searched as email, MSG files can be scanned using mail specific criteria such as address or message type. However, they must be designated as email by using this screen, which is enabled from the [Select Other Email Stores](#) wizard page.

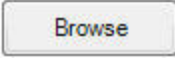
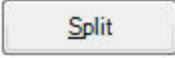
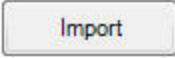
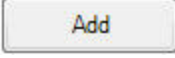
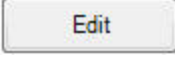
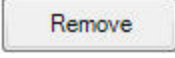
To search MSG files as emails, use this page to list the paths where individual mail items are stored. These file paths will be queried and then processed using email specific criteria such as address, message type or date in addition to the traditionally used keywords and dates.

Sections

	Description
File Path	Full Name of the path to be searched Please note: File paths be mapped to a drive letter or entered as a UNC path.
Subfolders	Indicates whether subfolders of the path will be searched.

Logging Options	<p>Select this option to ignore errors caused by non-MSG files appearing in the selected file paths.</p> <p>Please note: By un-checking this option, those non-MSG files will be listed as exceptions.</p>
------------------------	--

Buttons

	Description
	Allows the user to browse the computer for paths to enter in this list.
	<p>Breaks up the selected path into its first level directories.</p> <p>Please note: This split option is very helpful in making your search more efficient by adding more tasks to the process queue.</p>
	Allows the user to import the file path list from a .csv or .txt file. See Import Format Page for more detail.
	Allows the user to add a new file path directly.
	Allows the user to edit the selected entry.
	Removes the selected path from the list.

Context Menu

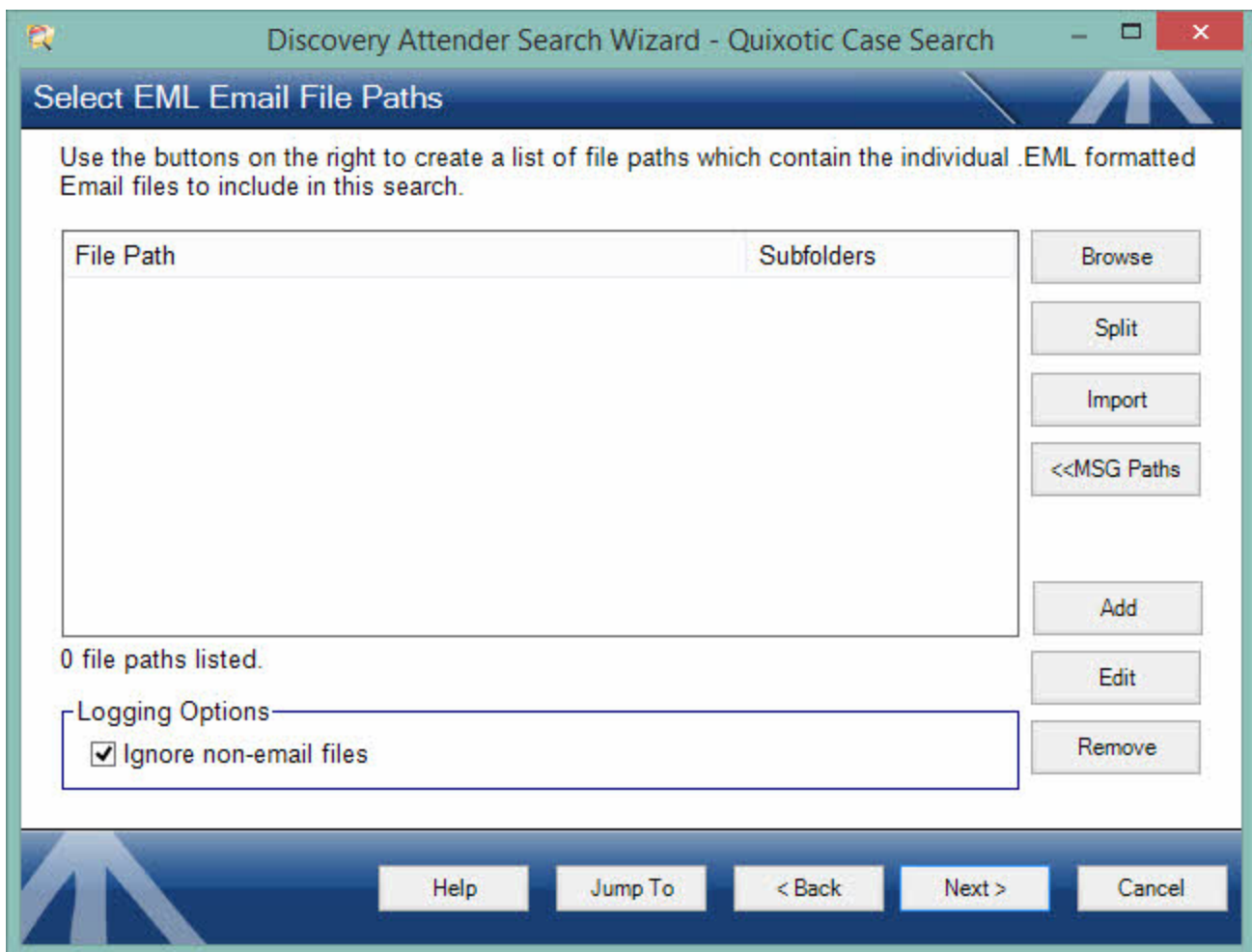
	Description
Select All	Selects all items on the list.
Remove	Removes the selected File Path
Export	Exports the list of File Paths
Export to Text	...to a text file.
Export to CSV	...to a .csv file (which can be opened in Excel).
Import	Imports a list of File Paths from a file. See Import Format Page for more detail.

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Select EMLFile Paths

This screen will appear when you select **Standard Email Files (MIME) (.EML Files)** on the [Specify Other Email Stores](#) wizard page.



Description

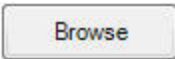

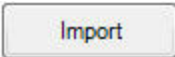
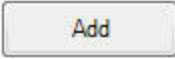
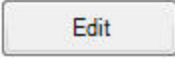
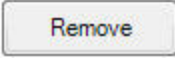
Discovery Attender can search .EML files as files or email. When searched as email, EML files can be scanned using mail specific criteria such as address or message type. However, they must be designated as email by using this screen, which is enabled from the [Select Other Email Stores](#) wizard page.

To search MSG files as emails, use this page to list the paths where individual mail items are stored. These file paths will be queried and then processed using email specific criteria such as address, message type or date in addition to the traditionally used keywords and dates.

Sections

	Description
File Path	Full Name of the path to be searched Please note: File paths be mapped to a drive letter or entered as a UNC path.
Subfolders	Indicates whether subfolders of the path will be searched.
Logging Options	Select this option to ignore errors caused by non-EML files appearing in the selected file paths. Please note: By un-checking this option, those non-EML files will be listed as exceptions.

Buttons

	Description
	Allows the user to browse the computer for paths to enter in this list.
	Breaks up the selected path into its first level directories. Please note: This split option is very helpful in making your search more efficient by adding more tasks to the process queue.
	Allows the user to import the file path list from a .csv or .txt file. See Import Format Page for more detail.
	Allows the user to add a new file path directly.
	Allows the user to edit the selected entry.
	Removes the selected path from the list.

Context Menu

	Description
Select All	Selects all items on the list.
Remove	Removes the selected File Path

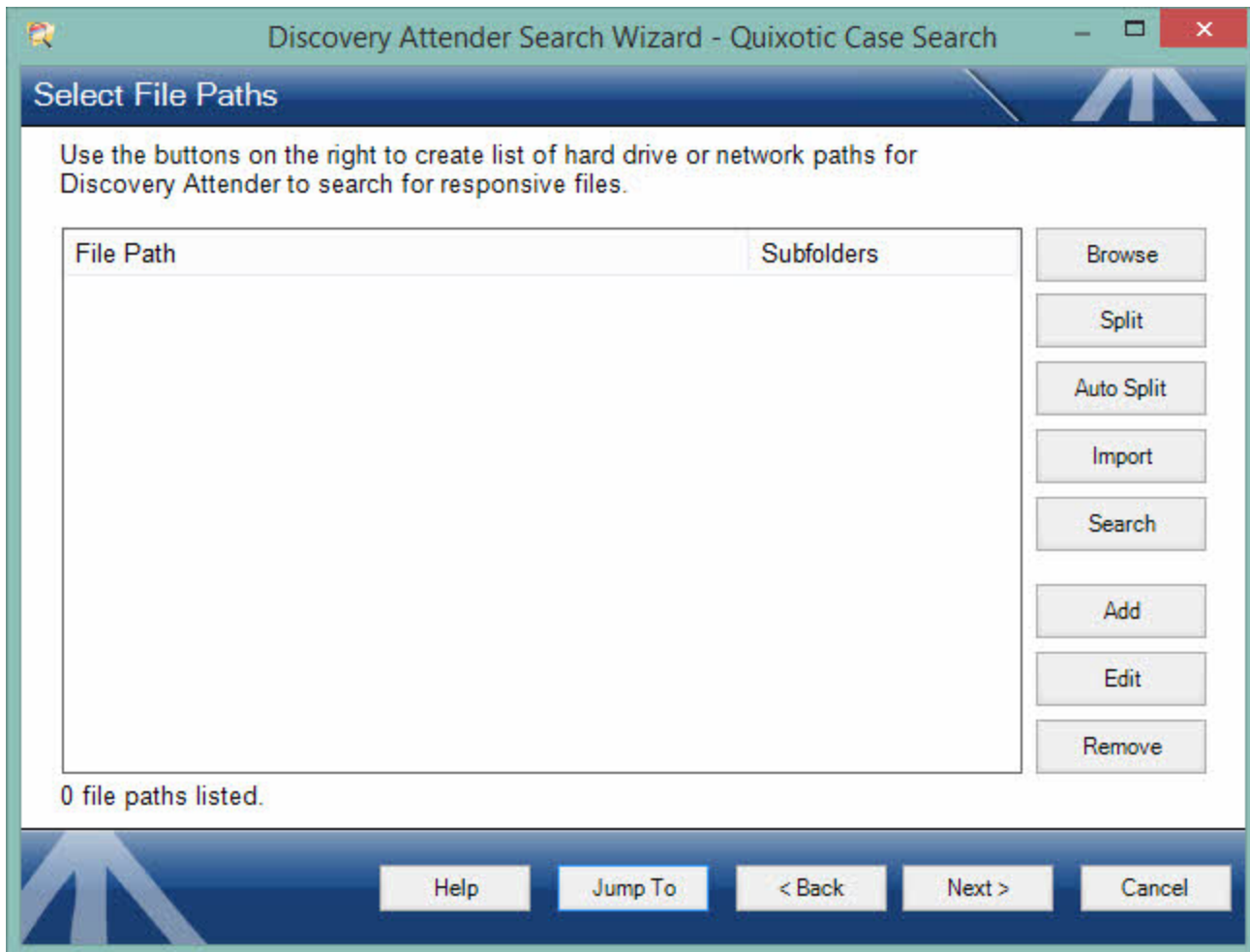
Export	Exports the list of File Paths
Export to Text	...to a text file.
Export to CSV	...to a .csv file (which can be opened in Excel).
Import	Imports a list of File Paths from a file. See Import Format Page for more detail.

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Select File Paths

This screen will appear when you select **Files on Network Shares, Hard Drives or Local Machines** on the [Select Areas to Search](#) wizard page.



Description

This screen allows you to select and edit a list of File Paths to include in the search. In addition to the local machine, File Paths can also be searched on file servers, laptops or desktops as long as the following conditions are met:

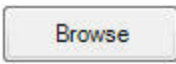
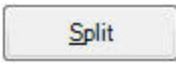
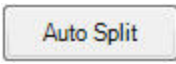
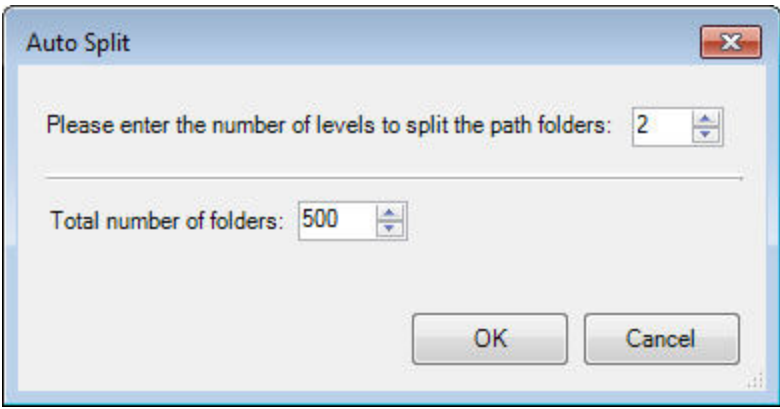
- The installation machine has connectivity to the file store location via mapped drive or UNC path
- The login account has full permissions to search the file store location.
- File names (including path) do not exceed 255 characters

Please note: Before embarking on a large file search, please review the [Searching Large File Shares](#) article for more information and best practices.

Columns

Title	Description
File Path	Full Name of the path to be searched (Note: Can be mapped or UNC path)
Subfolders	Indicates whether subfolders of the path are being searched

Buttons

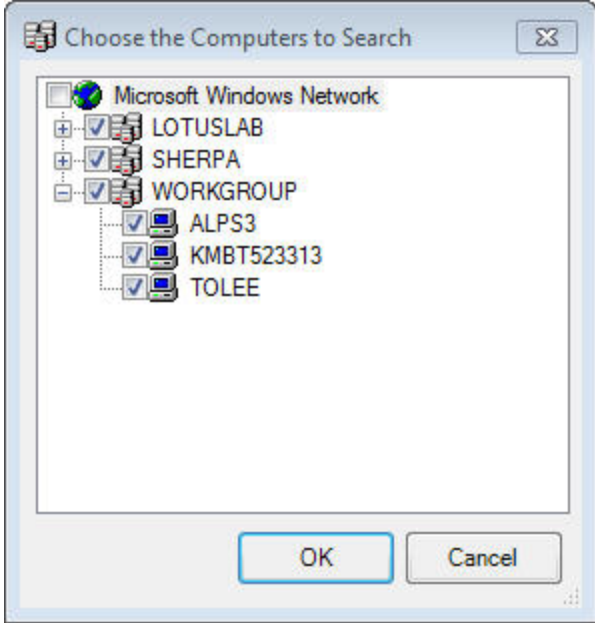
	Allows you to browse your network for file shares to add to the list.
	Breaks up the selected path into its first level directories. This is very helpful in making your search more efficient by adding more tasks to the process queue.
	Opens the automatic split dialog which makes splitting more effective by allowing you to choose the number of levels to split, and the maximum number of folders to have in your search. 

Import

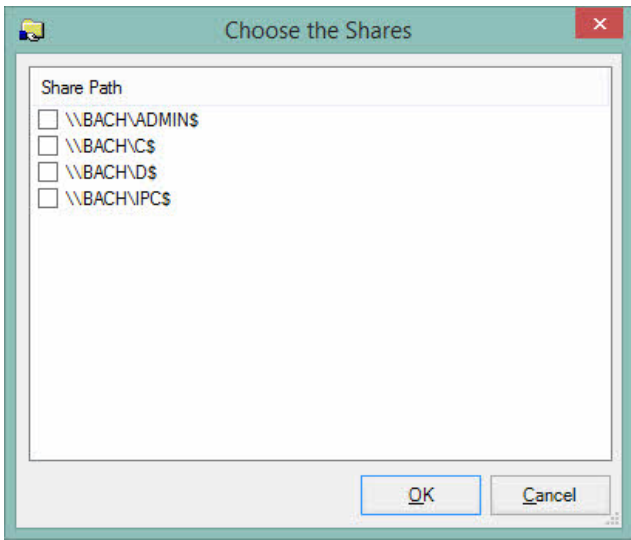
Allows the user to import a list of paths from a .csv or .txt file.

Search

Select a computer where file paths can be found. This can be useful for selecting files on remote desktops or network shares.



Selecting the domain, or clicking the + sign will allow you to see the machines listed under that domain. Check the boxes corresponding to the machines you'd like to search and then click 'OK' to open a dialog to select any applicable shares on those machines.



Check a share and click 'OK' it to the list.

Please note: You will need connectivity, access and permissions to view and collect data from these drives.

Add	Manually add a path to the list.
Edit	Edit the selected path.
Remove	Remove the selected path from the list.

Context Menu

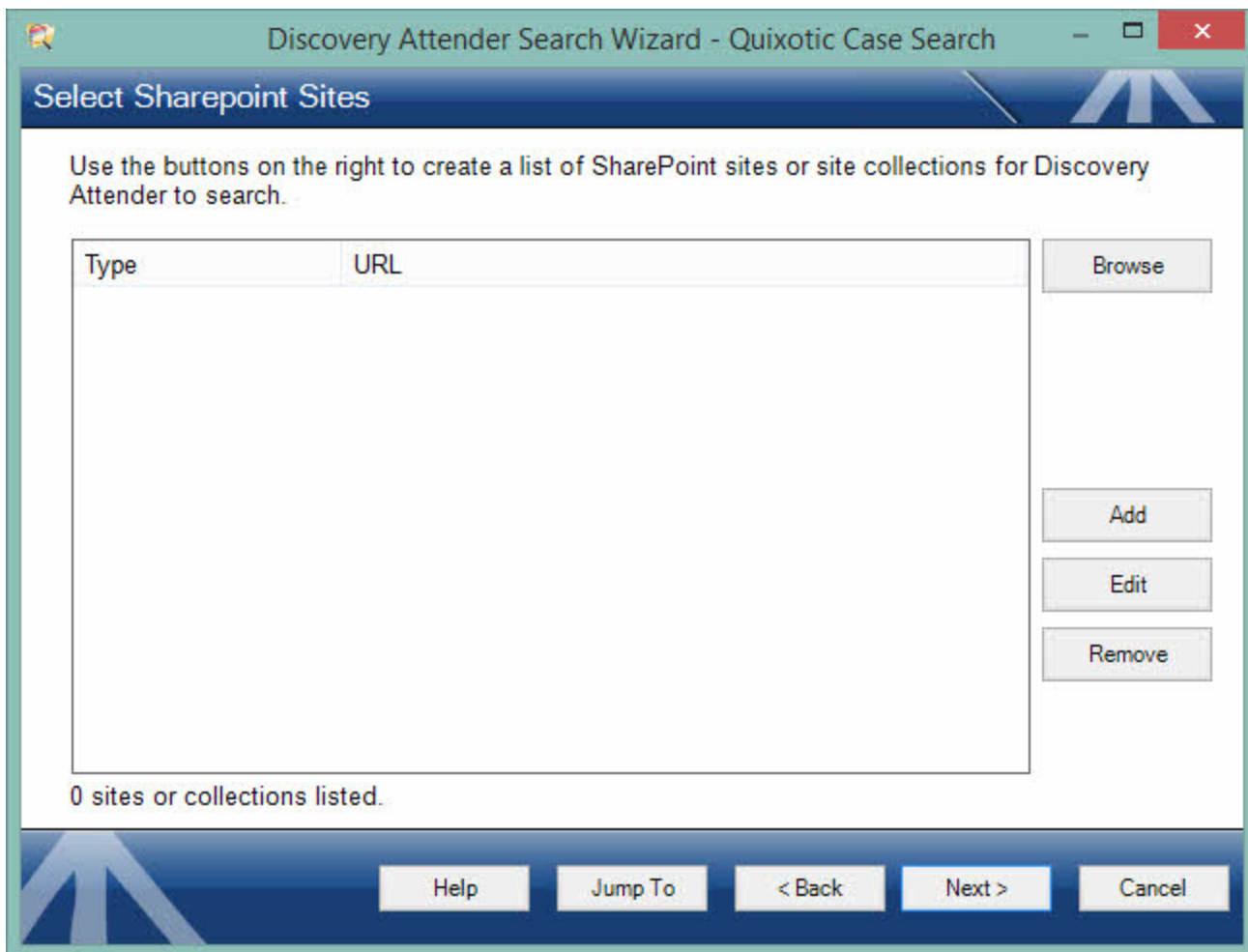
	Description
Select All	Selects all items on the list.
Remove	Removes the selected File Path
Export	Exports the list of File Paths
Export to Text	...to a text file.
Export to CSV	...to a .csv file (which can be opened in Excel).
Import	Imports a list of File Paths from a file. See Import Format Page for more detail.

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Select SharePoint Sites

This screen will appear when you select **SharePoint (requires SharePoint component)** on the [Select Areas to Search](#) page.



Description

This page allows you to select SharePoint sites or collections to be included as part of the search.

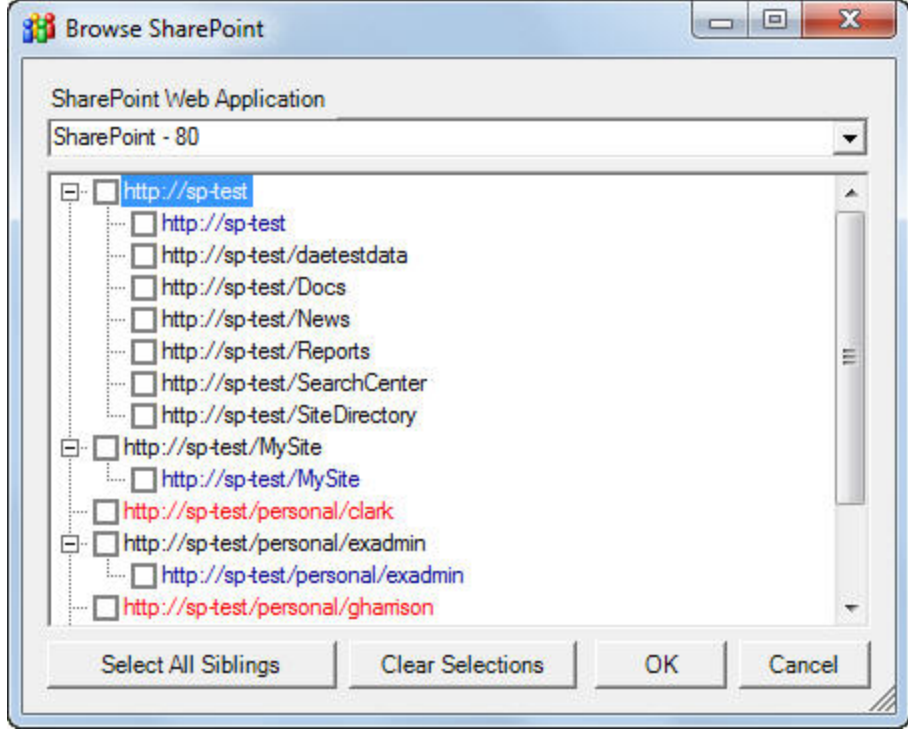
Please note:

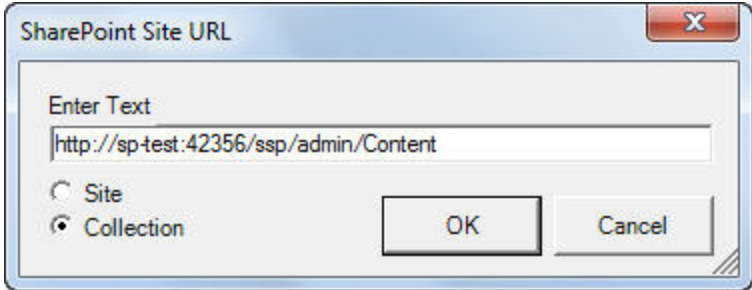
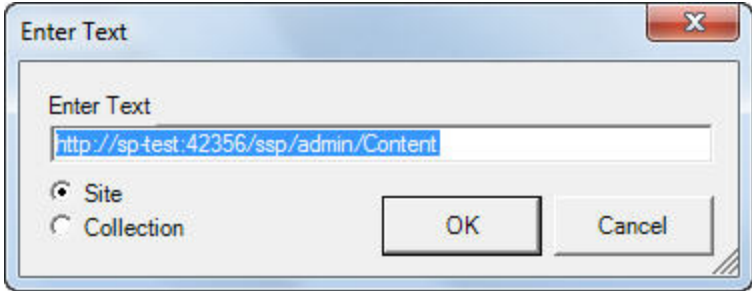
- Before you can enter values in this page, the default SharePoint server credentials must be entered and connectivity tested from the [Settings](#). Those server credentials are dependent on the *Discovery Attender for SharePoint* component being properly [installed](#).
- See the SharePoint [summary page](#) for help with setting up SharePoint searches.

Options

	Description
Type	Displays whether the intended SharePoint destination is a Site or Site Collection.
URL	The URL indicating the SharePoint server and directory to be searched.

Buttons

Add	Allows you to browse your SharePoint server for sites or collections to add to the list:
	
<p>Use the <i>SharePoint Web Application</i> option to select the higher level Web Application entity. For more details, refer to your SharePoint Administrator for the proper value.</p>	
<p>Next, collections can be expanded or collapsed by clicking on the plus(+) or minus(-) signs to the left of their node name. Site names displayed in blue or black are accessible. Blue values indicate the site is a top-level site within the Collection, whereas black indicates lower level sub-sites.</p>	
<p>Site names displayed in red generally indicate that the <i>Discovery Attender for SharePoint</i> component lacks sufficient permission to search these sites. However, there may be top-level Sites beneath the site names that contain searchable data.</p>	
<p>The default SharePoint server is defined on the SharePoint Settings page.</p>	
Add	Manually add a site or collection to the list:

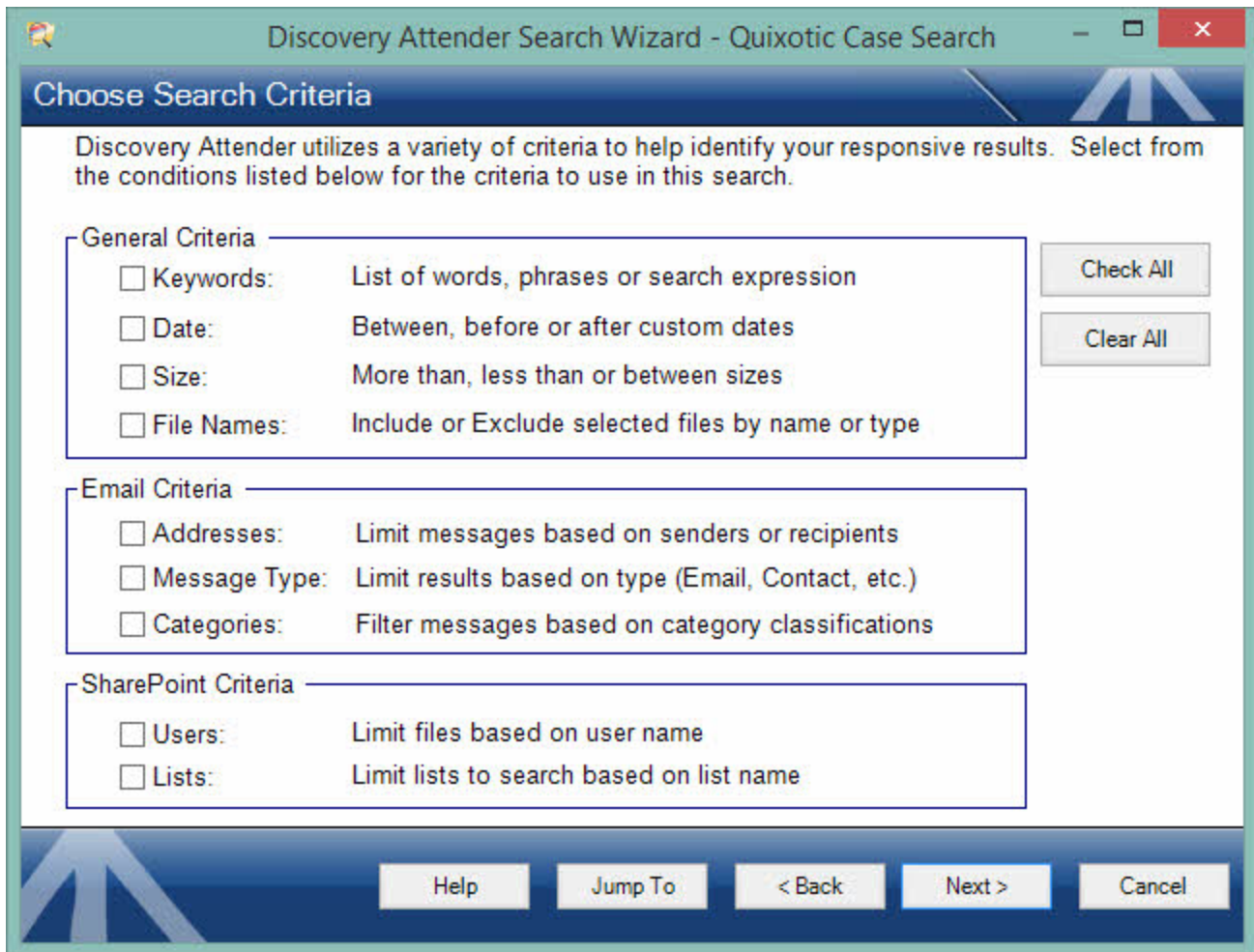
	 <p>Enter the appropriate URL and designate whether it represents a Site or a Collection.</p>
<p>Edit</p>	<p>Edit the selected entry:</p>  <p>Edit the URL and designate whether it represents a Site or a Collection.</p>
<p>Remove</p>	<p>Remove the selected site or collection from the list.</p>

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Choose Search Criteria

This wizard page will appear for all searches.



Description

This wizard screen allows users to choose the conditions for filtering results during the search. Selecting an option on this screen will enable more detailed choices on subsequent wizard pages.

Please note: To make your search most efficient, only choose the options that are relevant to your search.

	Description
General Criteria	This section is always enabled and these options are available for any kind of search.
<i>Keywords</i>	Returns hits in items which contain specific words or phrases.
<i>Date</i>	Only include results that fall within a certain date range.
<i>Size</i>	Only include results that fall within a certain size range.
<i>File Name or Type</i>	Restrict file and attachment results based on file name or type.
Email Cri-	This section is only enabled if email stores are being searched.

Criteria	
<i>Addresses</i>	Limit message and attachment results based on specific recipient or sender criteria. For use with email items only.
<i>Message Type</i>	Restrict message items results based on the category – Email Message, Calendar Item, Contact, etc. Please note: If you wish to search all message types, leave this option unchecked as all message types are searched by default.
SharePoint Criteria	This section is only enabled if SharePoint is included as part of your search.
<i>Users</i>	Restrict results to items which were created or modified by certain users
<i>Lists</i>	Restrict results to items which are located in specified SharePoint lists.
<i>Old Versions</i>	Checking this option will ensure that older versions of files stored in SharePoint are searched. Keeping this option unchecked means only the most current version will be searched. There are certain limitations to searching old versions, see SharePoint summary for details.

Buttons

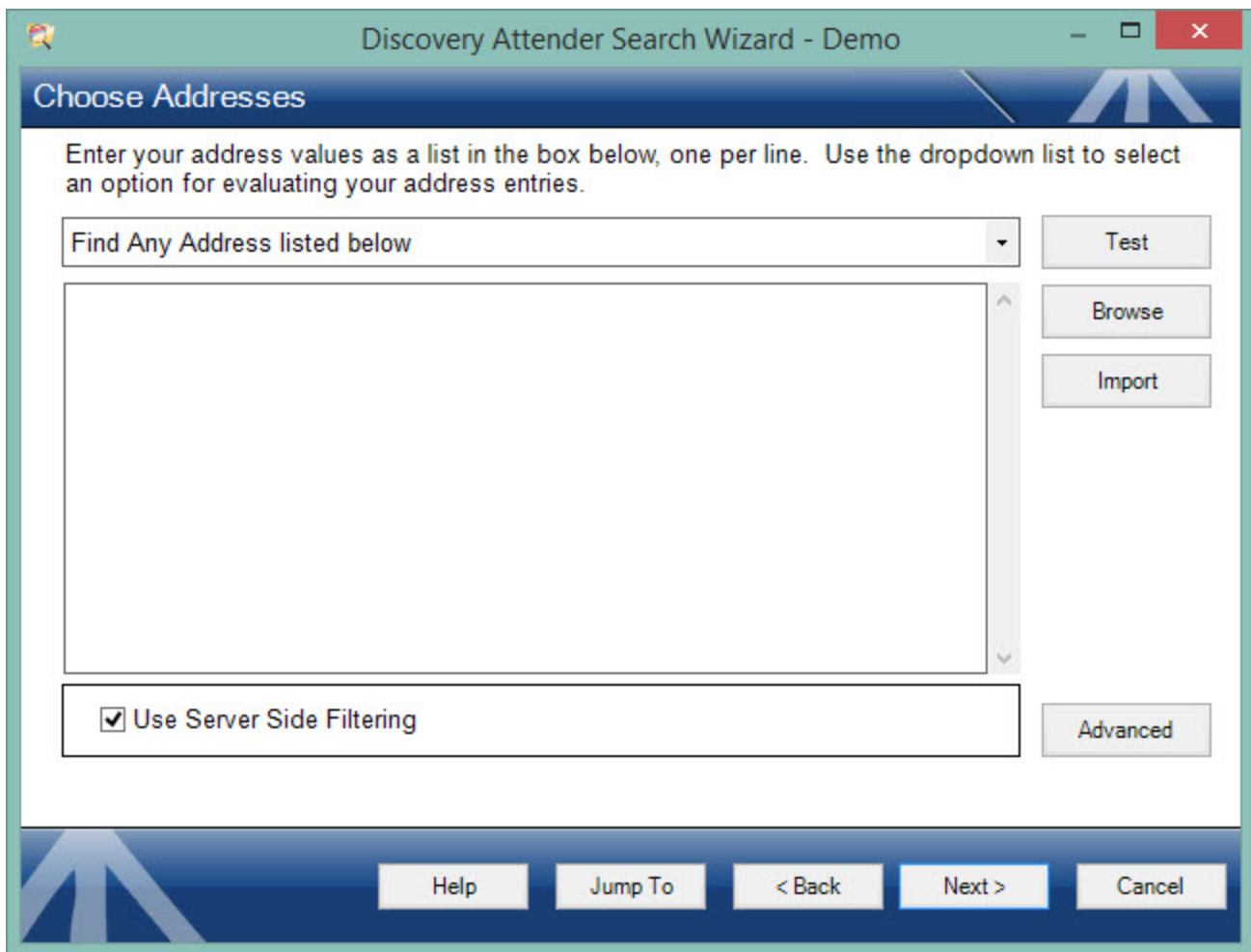
<input type="button" value="Check All"/>	Select (check) all check boxes in the criteria list
<input type="button" value="Clear All"/>	Un-check all check boxes in the criteria list

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Choose Addresses

This screen will appear when **Addresses** has been selected on the [Choose Search Criteria](#) page.



Description

This wizard screen tells *Discovery Attender* what address criteria should be used to help filter message results. Enter the address criteria in the text box, one per line, and then choose an evaluation method from the drop down list.

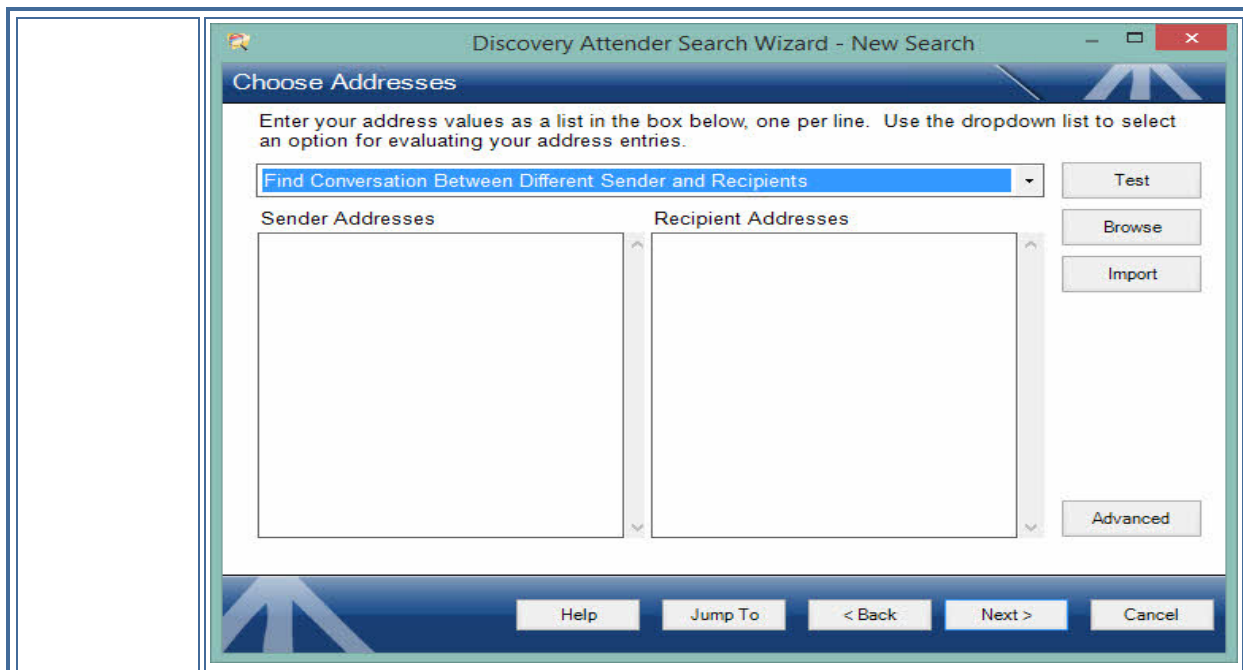
Please note:

- *Discovery Attender* will search the **Display Name** and **Address** (aka Routing or X 400) portions of address properties to match the criteria. It will also search the **Common or SMTP address** property, where applicable.
- The address must match the entire field, so it is advisable to use wildcards (e.g. *) around your address to procure a match. See the [Email Address Clarification](#) below for more detail.
- Internal addresses found in Exchange based email often use a distinctive address pattern (e.g. [/O=SherpaSoftware/OU=QA/CN=RECIPIENTS/CN=TUSER](#)) instead of the more familiar format [tuser@sherpasoftware.com](#).

- It may be easier to enter addresses from internal addresses by using the [Global Address List](#) (GAL). In this case use the [Browse](#) button to select the entries (recommended). If this is not possible (e.g. no link to the GAL, employee has left the organization), then your best bet to find an internal address is to use both **Display Name** and **smtp address**.
- The entire address field must be matched, so it is essential that wildcards are used when searching for portions of addresses. For example, if searching for the Sherpa Software domain, you would use ***@sh-erpasoftware.com**. Searching for a last name only should have wildcards on either side, e.g. ***miller***. For more information, see [Email Address Clarification](#) below.
- Proximity is **not** supported with Address criteria. If you require proximity, use [keyword searching](#) instead. Just remember to enable '**Messages Addresses**' in the [MESSAGE OPTIONS](#) wizard page.

Options

Find Any Address listed below	An Address can match either Sender or Recipients (To, CC, BCC) to return a hit
Find Any Sender ...	Addresses from the list must match the Sender to return a hit
Find Any Recipient ...	Addresses from the list must match at least one Recipient (TO, CC, BCC) to return a hit. Note: A hit will be returned even if other recipients are listed as long as one of the recipients is listed.
Find Only Specified Recipients	Only returns a match where ALL the recipients are on this list. Note: A hit will NOT be returned if it there are any other recipients on the email.
Find Conversation Between Any Two Addresses	The Sender and at least one Recipient must be in the address list. There should be at least two addresses in the list to work correctly. This option is Ideal for finding messages between specified address, but keep in mind if one of the addresses belongs to the custodian whose email you are searching, it is more efficient to use the Find Any Address option with the non-custodial addresses.
Find Conversation Between Different...	Finds results where the sender is from one list and at least one recipient is from the other. There must be at least one address per box. The screen will change to this view:



Find only Specified Conversation

The Sender and at least all Recipient must be in the address list. There should be at least two addresses in the list to work correctly.

Note: If any other addressees are in the email that are not on this list, the email will not be returned as a result.

All conversation options will result in false positives if the sender is in the habit of CC or BCCing their address.

Exclude All Addresses

Addresses in the list can *not* be in any of the message address fields (Sender, To, CC, BCC, On Behalf Of).

Please note: The Exclude options can be very tricky to verify. It is better to use [Automatic Labels](#) for identifying email that should be excluded. Additionally, please see the [Handling Privileged Data](#) section for other ideas.

Exclude Sender ...

Addresses in the list can *not* be in the Sender fields

Exclude Recipient...

Addresses in the list can *not* be in any of the recipient fields

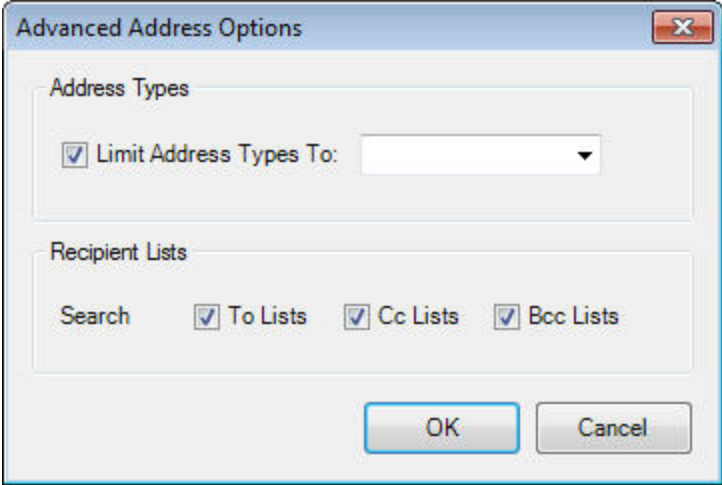
Note: The above *EXCLUDE* options are **not** recommended because of the lack of auditing (i.e. listing what documents were excluded). Instead Sherpa recommends using [automatic labels](#), [views](#) or [filters](#) combined with organizational tools in [Results Management](#).

Use Server Side Filtering

This option enables *Server Side Filtering* specifically for Address criteria. If enabled, the data store filters in Exchange or PST files will be used as a first pass in applying the address criteria to the messages being searched. Enabling this option significantly speeds up the search, however, precision can be lost. We recommend testing Server Side Filtering for addresses before deploying it on a production search to verify its functionality in your environment.

	If you would like this option enabled or disabled by default, please see the Settings .
--	---

Buttons

	Description
Test	Using this screen, the user can test address criteria against sample data from mailboxes, PST files or loose .msg files. Note: When using the test criteria, please choose small data stores.
Browse	Opens the global address list (GAL) to help select the entries to populate the criteria box. Browsing the GAL is recommended if you are choosing addresses from your Exchange environment. See Note below about the syntax.
Import	Allows the user to select a file that contains address criteria. The file must be in text (.txt) format. The text entries will be imported verbatim.
Advanced	Opens the <i>ADVANCED ADDRESS OPTION</i> dialog box which allows the user to specify more granular aspects of the addresses criteria by limiting the address criteria using the type of address (e.g. EX, SMTP, Notes etc.) or recipient field (To, CC, BCC). <div style="text-align: center;">  </div>

Email Address Clarification

An address search term must match the **entire property text** to be considered a hit. However, [pattern matching](#) can be used with the address search term to maximize hits. See the chart below for examples

Example Address Properties	
A	<i>John Smith</i> < john.smith@foo.com >
B	john.smith@foo.com
C	" <i>John Smith</i> "
D	jsmith@foo.com

Search Term	Hits Returned
<i>john.smith@foo.com</i>	B
<i>*smith@foo.com</i>	B and D
<i>*smith@foo.com*</i>	A, B and D
<i>*smith*</i>	A, B, C and D
<i>*john.smith@foo.com*</i>	A and B

For a list of MAPI properties that are searched for email address criteria, please see the [properties](#) help page.

Please note: Discovery Attender may automatically format addresses chosen from the GAL for the most efficient searching. For example, choosing Wolfgang Mozart from the GAL as a test will enter the following into the text box:

Wolfgang Mozart
LIKE("cn=WMOZART"):EX
"wmozart@sherpa-exchange.com":SMTP

The first entry: *Wolfgang Mozart* is the Display Name of the address. The second line is the unique alias *cn=WMOZART* converted to Discovery Attender engine syntax **LIKE("cn=WMOZART"):EX**. This expression is the equivalent of entering: ***cn=WMOZART***

The **LIKE("")** portion indicates this entry has a [Like Pattern](#), while the **:EX** defines the Address Type. See [Advanced](#) button for more detail.

Context Menu

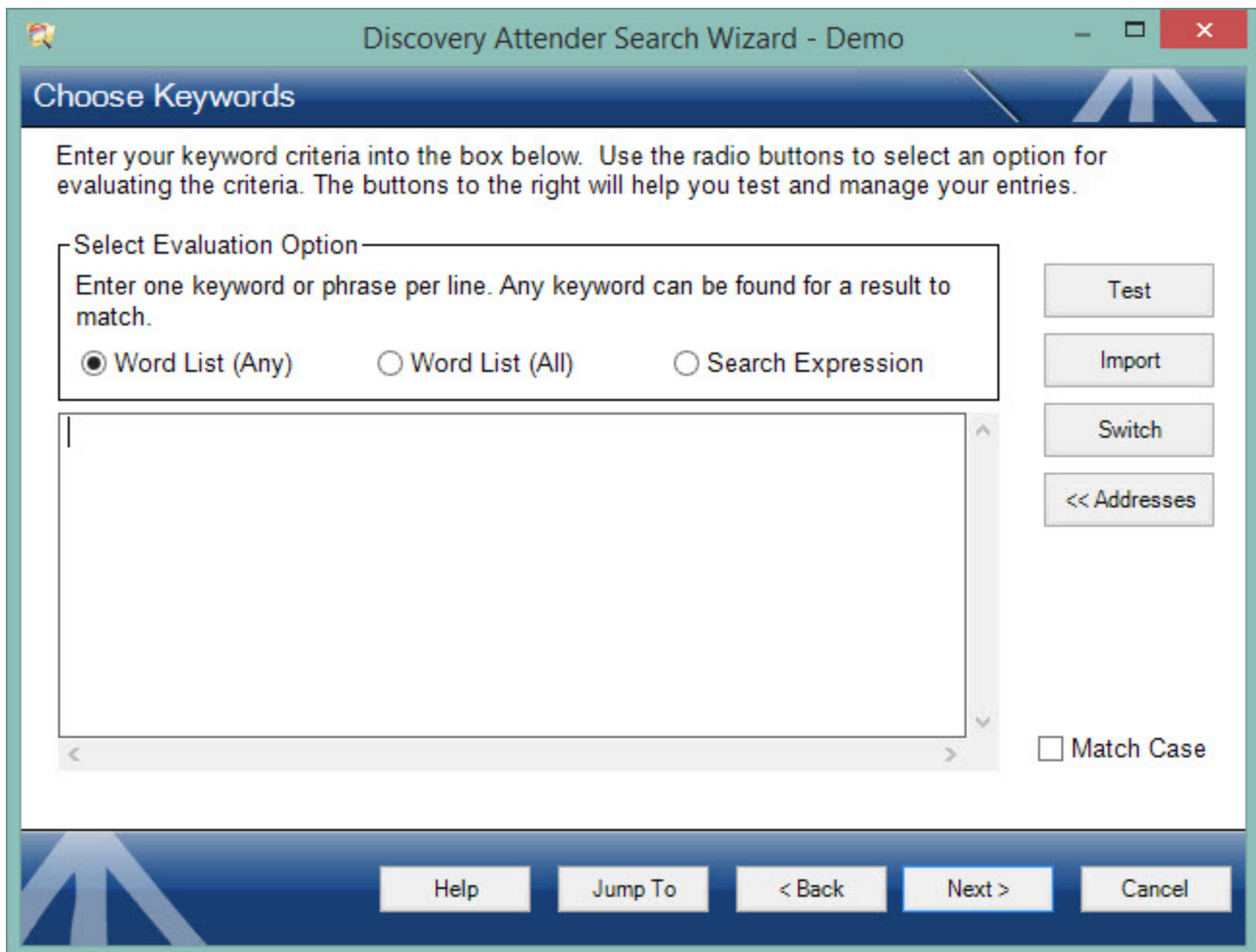
	Description
Undo	Erases the previous command for the text box
Cut	Removes the selected items from the list and holds them in memory
Copy	Holds the selected item in memory while keeping it in the list
Paste	Takes items from memory and adds them to the selected list
Delete	Removes the selected items from the list but does not keep them in memory
Select All	Selects all items in the list box

See Also

- [Pattern Matching](#)
- [Properties](#)
- [Main Console](#)
- [Table of Contents](#)

Search Wizard: Choose Keywords

This screen will appear when **Keywords** has been selected on the [Choose Search Criteria](#) page.



The screenshot shows a window titled "Discovery Attender Search Wizard - Demo" with a "Choose Keywords" header. The main area contains instructions: "Enter your keyword criteria into the box below. Use the radio buttons to select an option for evaluating the criteria. The buttons to the right will help you test and manage your entries." Below this is a section titled "Select Evaluation Option" with the instruction "Enter one keyword or phrase per line. Any keyword can be found for a result to match." There are three radio buttons: "Word List (Any)" (selected), "Word List (All)", and "Search Expression". A large text area is provided for input. To the right of the text area are four buttons: "Test", "Import", "Switch", and "<< Addresses". At the bottom right of the main area is a checkbox labeled "Match Case". The bottom of the window features a navigation bar with buttons for "Help", "Jump To", "< Back", "Next >", and "Cancel".

Description

This wizard screen allows a user to enter the keyword criteria to use in a search. You have the option to input a list of words or to enter a custom search expression using Boolean logic.

Enter the keyword criteria in the text box and then choose an evaluation method from the drop down list. **Be sure to use the [keyword tester](#) to verify the validity of your entries.**

Please note: If you are using AND/OR (i.e. Boolean) logic, you must select **Search Expression**.

Options

	Description
Word List (Find any of these keywords)	If <i>any</i> of the listed keywords are found, the search item will be passed (i.e. Huck OR Tom OR Becky). Uses Boolean OR.
Word List (All of these keywords must be found)	Requires that <i>all</i> the listed words or phrases must be found for the search item to pass (i.e. Huck AND Tom AND Becky)
Search Expression (Use AND/OR logic)	This allows the administrator to enter a logical expression for keyword usage. See Search Term Clarification for more detail.
Match Case	Check here to ensure the search will match only if the exact case of the entered keywords is found. Leave blank (default) to search a word or expression regardless of case. Please note: All words or phrases in the text box will be affected by this option and must match case if selected.

Word List Rules

When using a **Word list** (Any or All), keep in mind the following rules are used for evaluating the entries:

- Keywords or Phrases should be entered one word or phrase per line.
- Quotes are not needed for multi-word phrases. Each item is delineated by the line breaks.
- Wildcards may be used in words or phrases. Discovery Attender will automatically recognize wildcards as a [Like Pattern](#). If you wish to search for literal word, one that has a wildcard as a character you wish to search, put the word or expression in quotes.
- [Regular Expressions](#) may be used as part of the keyword list. Make sure to use the proper syntax (i.e. RegEx("**expression**").
- [Proximity operators](#) (e.g. raft NEAR(3) Mississippi) may be used in a Word List .
- [PATTERN](#) options for finding PCI or PII data can also be used.

Search Expression Rules

A search expression uses Boolean logic to enter a more complex set of keyword criteria. When a search expression is used, follow these guidelines:

- Valid Boolean operators are: AND, OR, AND NOT
- Always use the [Keyword Tester](#) to validate your search expression.
- Long search expressions will word-wrap around the text box. **Do not** enter words or phrases one per line, as this could cause an error or a logical mistranslation.
- Multi-word phrases need to be surrounded by double quotes, e.g. "[Statue of Liberty](#)"

Multi-word phrases with wildcards need to use the LIKE [reserved](#) word . For example, *LIKE("stock market*")*.

- Double quotes (") should surround words or phrases with punctuation including spaces, hyphens, parenthesis or commas, e.g. "100-234".
- Be sure to use parenthesis to group search expressions, e.g. **((blue OR green) AND (red or yellow)) OR (lions AND tigers AND bears)**
- Proximity operators can be used in search expressions, e.g. **(bank* NEAR asset* AND loan NEAR payment)**
- Discovery Attender will automatically consider items with wildcards to be valid Like Patterns, unless that word or phrase is in double quotes. Therefore, ***day*** will find **today** or **days**, while **"*day*"** will find only the exact phrase ***day*** with the asterisks included.
- See [Search Term Clarification](#) for more detail on proximity, nesting, pattern matching and more.

Please note: If you have a long, complicated search expression, it helps to break it up in its component parts and build it up one expression at a time using the [keyword tester](#).

Defining Branch Expression Hits

To ensure that expression branch hits are reported correctly in the keyword views and reports, use the less-than and greater-than signs ("<",">") at the beginning and end of the portion of the expression to delineate a discreet branch of a larger search expression (i.e. <[expression](#)>).

If employed correctly, the branch expression hits will show up in the *Results Management | Keyword [node](#)*.

For example, when using the expression: **((blue OR green) AND (red OR yellow)) OR ((cat OR dog) AND (lion* OR tiger* OR bear*))** , you may want to report on **(blue OR green) AND (red OR yellow)** as one branch hit and **(cat OR dog) AND (lion* OR tiger* OR bear*)** as another.

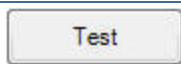
To discreetly identify each phrase, use the less-than and greater-than signs as in this example: **<((blue OR green) AND (red OR yellow))> OR <((cat OR dog) AND (lion* OR tiger* OR bear*))>** .

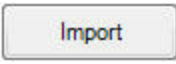

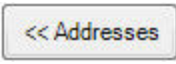
Syntax note: These delineators can be substituted for the outermost parenthesis of the branch. This example: **<blue AND green> OR <red AND yellow>** is equivalent to **<(blue AND green)> OR <(red AND yellow)>**

If parenthesis were not used in your original expression, the addition of the branch delineators (<,>) will add grouping logic to the expression.

If you need assistance with search expressions, please contact [Sherpa Technical Support](#).

Buttons

	Description
	Opens the keyword tester which allows the user to validate the keyword criteria against files and sample text. Highly Recommended.

	Allows the user to select a file that contains keyword criteria (either a list or search expression). The file must be in text (.txt) format. The entries will be copied into this wizard page verbatim.
	Changes how the keyword criteria is evaluated within the search. A list will be converted into a Search Expression, while a Search Expression will be converted to the closest list (Any, All) equivalent.
	Imports the addresses specified on the Choose Addresses wizard page and adds them to the keyword list. This, along with other choices , is helpful in finding addresses in the bodies of messages.

Context Menu

	Description
Undo	Erases the previous command for the text box
Cut	Removes the selected items from the list and holds them in memory
Copy	Holds the selected item in memory while keeping it in the list
Paste	Takes items from memory and adds them to the selected list
Delete	Removes the selected items from the list but does not keep them in memory
Select All	Selects all items on the list

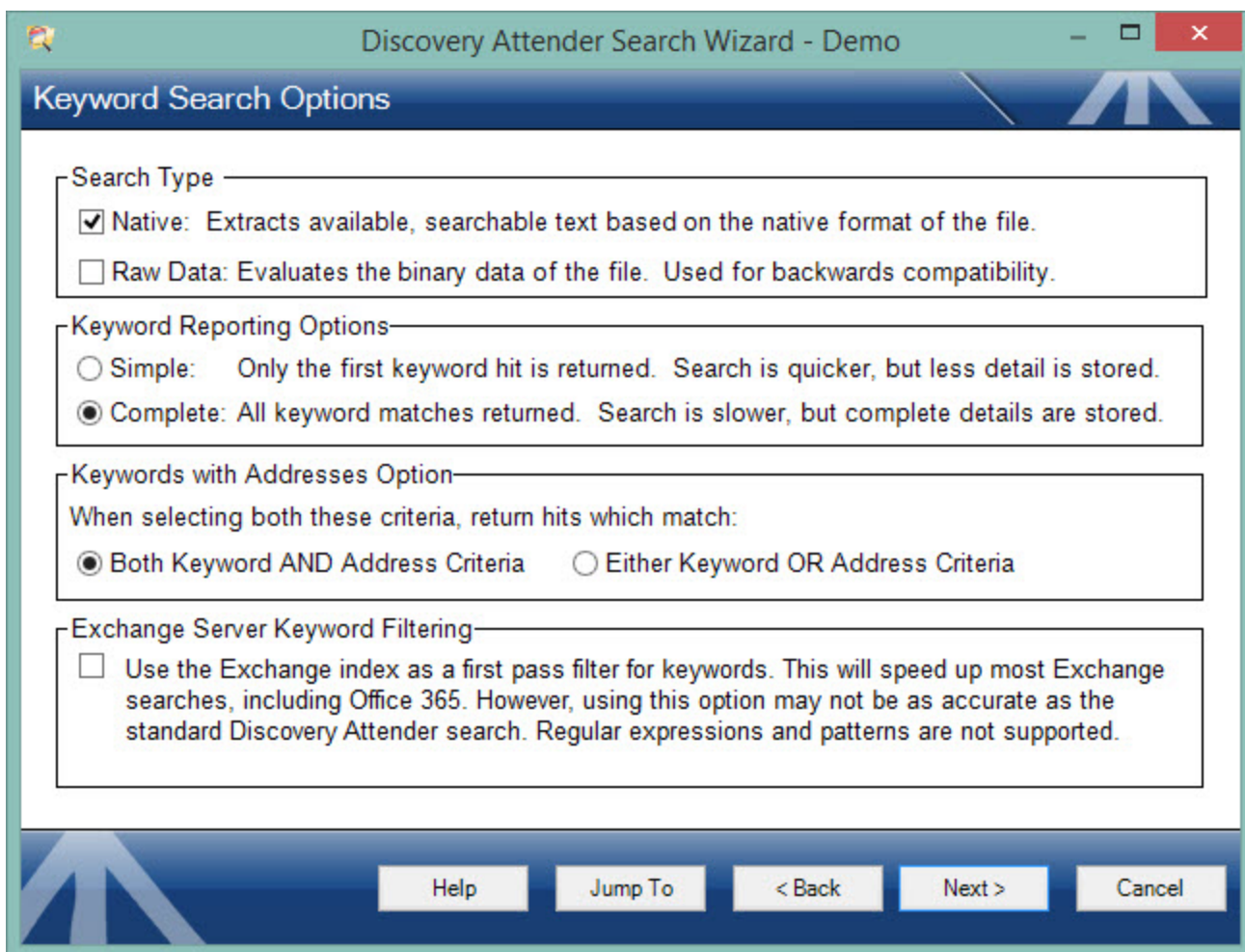
Please note: There may be other context menu options available for inserting different types of text or characters.

See Also

- [Pattern Matching](#)
- [Keyword Tester](#)
- [Search Term Clarification](#)
- [Table of Contents](#)

Search Wizard: Keyword Search Options

This screen will appear when **Keywords** has been selected on the [Choose Search Criteria](#) page, although some options may be disabled.



Description

Discovery Attender has a number of options for use in searching keywords. This wizard screen allows the user to choose the ones that will work best with their search.

Search Type	Method by which the contents of files will be parsed by the search engine. At least one option must be chosen when searching for keywords in files or attachments.
Native Format	All searchable text is extracted from a file or attachment using the item's proprietary file format, if available (e.g. MS Word for .doc). <i>Discovery Attender</i> uses the dtSearch® engine for parsing text from the file. See the supported file list for more detail.
Raw Data	Opens a file on a binary level using a text comparison of both ASCII and UNICODE versions of the criteria. It is highly recommended that you disable this setting if you have any acronyms in your search. Please note: This option is included for backwards compatibility. The functionality has generally been replaced by the Native format option. It is off by default and not needed in most searches. If enabled, this option will add significant time to your search and increase false positives.

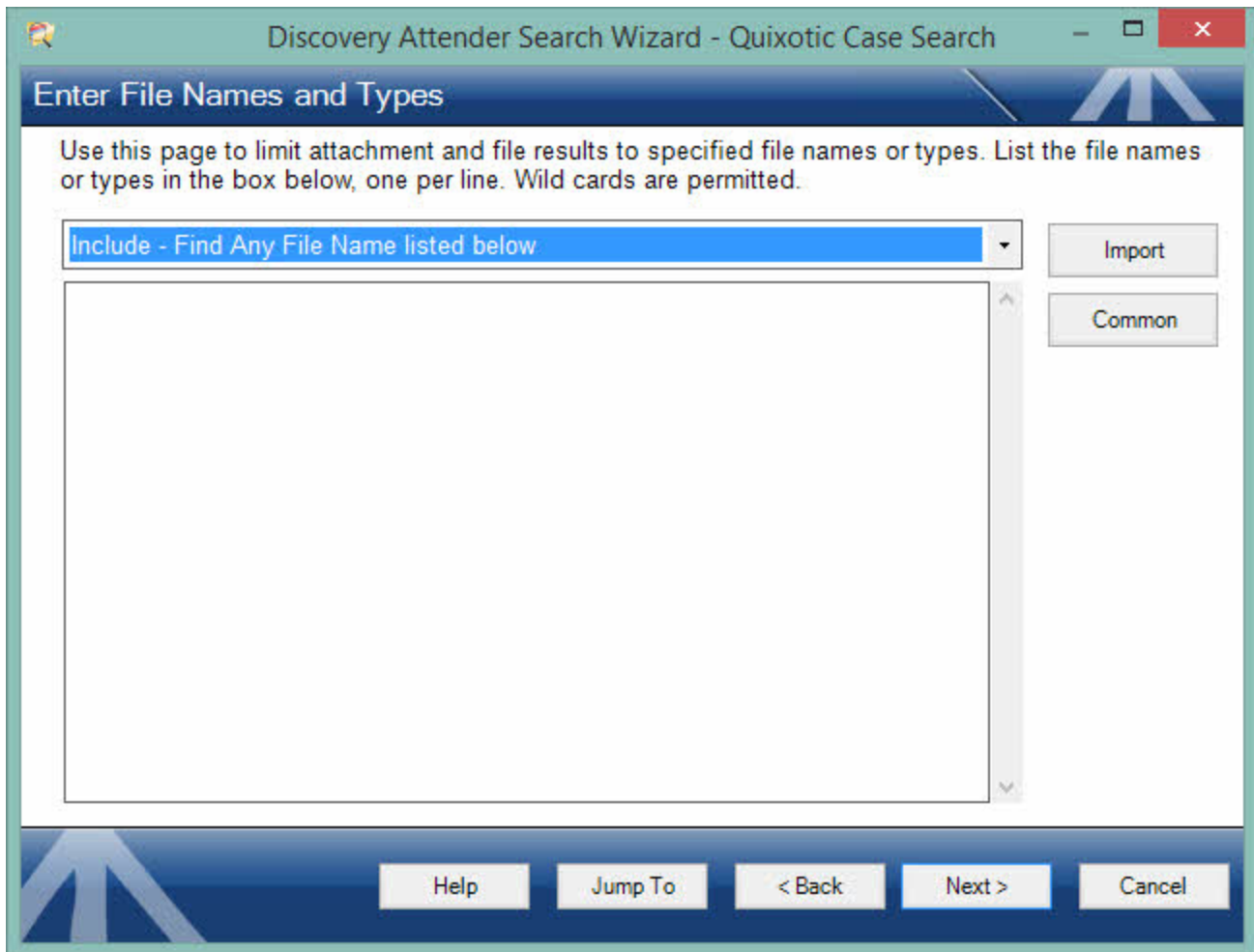
Keyword Reporting Options	Level of detail to return with keyword searches
Simple	Limited detail option, storing only the first keyword that matches the criteria in a result item. As soon as the criteria is validated, <i>Discovery Attender</i> will proceed to the next item. No other keywords are searched or returned. This is the quickest search method.
Complete	(default) After <i>Discovery Attender</i> finds a keyword match, the search will continue evaluating the keyword criteria for further matches until the criteria is exhausted. *All* keywords that match the criteria will be stored in the database. This option is helpful for keyword reporting, however, the time it takes to complete a search grows with the number of keywords or complexity of the search expression. If you are searching hundreds of keywords and do not require keyword reporting, use the Simple option instead.
Keyword with Address Option	When you are searching both Address and Keyword criteria, you have two options to evaluate the criteria.
Both... (AND)	(default) In order to return a hit, the item must validate for both the keyword AND address criteria.
Either... (OR)	A hit will be returned if an item matches the keyword OR the address criteria.
Exchange Server Keyword Filtering	When enabled, this option uses the native Exchange or Office 365 indexes as a first pass for keywords. While this significantly speeds up the search, it will be at the cost of precision. Exchange indexes cannot index all messages or attachments, and cannot report on what was not indexed using this method. Therefore using this option may result in missed results. It is useful, however, for sample searches, reporting and to test criteria. Regular Expressions and patterns cannot be used with Exchange server filtering. Note: This option will only be enabled if on-premises Exchange or Office 365 data stores are chosen.

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Enter File Names and Types

This screen will appear when **File Names** has been selected on the [Choose Search Criteria](#) page.



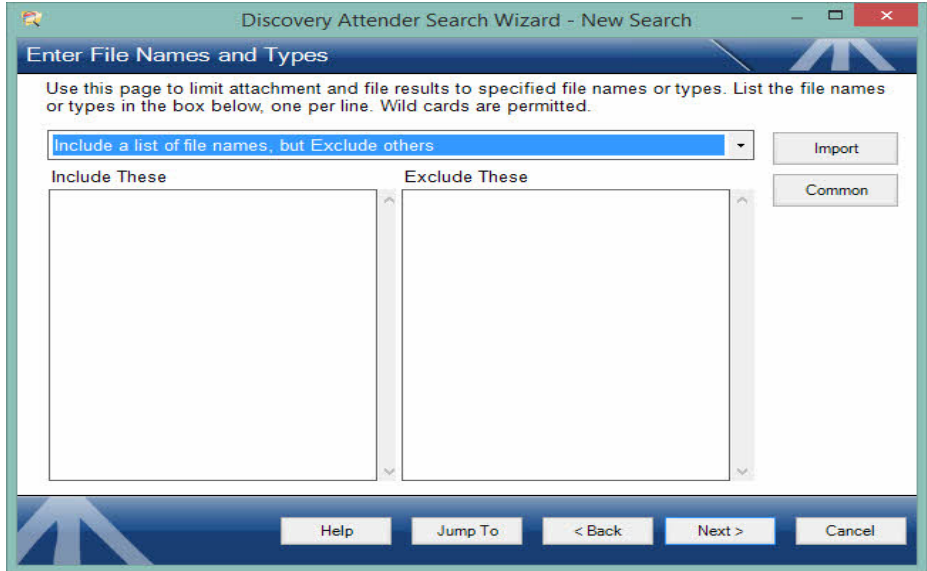
Description

This screen allows you to enter the criteria for files names or types. This criteria listed here will be compared against the names of files and attachments.

- One entry is permitted per line. Use of Like and RegEx patterns is permitted.
- This criteria is tested before keyword criteria . If you wish to create a list of all files excluded of a certain file type, [Custom Exceptions](#) can be used rather than this criteria.
- Most file and attachment names are found in a **filename.extension** format (e.g. budget.doc). To find all files of a specific type, use the asterisks (*) wildcard. For example, to find all word documents use ***.doc***. This will find all files which end in **.doc** (Word 2003 and below) or **.docx** (Word 2007 and above).
- It is highly recommended you use the [exclude](#) option for files which cannot be parsed for text (e.g. media files, executables, databases etc.). A list of example types can be accessed through the [Common](#) button.
- You can edit the default list of common files using the *Tools | Settings*, Common Files node.

- The reserved word **EXT(NONE)** allows you to search for or exclude files that have no extension.

Options

	Description
Include...	Result files and attachments names must match an item in the list to be returned as a hit.
Exclude...	Result files and attachments will be a hit, unless the file name matches an item in the list
Include a list of file names, but Exclude others	<p>Result items must be in the inclusion list, but cannot match the exclusion criteria. In the example below, all files ending in .doc will be returned, except a file with budget in its name.</p> <p>The list box will change to the following view:</p> 

Buttons

Title	Description
Import	Allows you to browse for a file which contains a list of file names or types . The file must be a text file (.txt). Entries gathered from the import list file will be added to the wizard line for line.
Common	Opens a dialog box containing a list of commonly included and excluded file names or types. You can use this option to add commonly included or excluded types to the text box. The lists that appear in this dialog box can be customized in the Setting screen.

Context Menu

	Description
Undo	Erases the previous command for the text box
Cut	Removes the selected items from the list and holds them in memory
Copy	Holds the selected item in memory while keeping it in the list
Paste	Takes items from memory and adds them to the selected list
Delete	Removes the selected items from the list but does not keep them in memory
Select All	Selects all items on the list

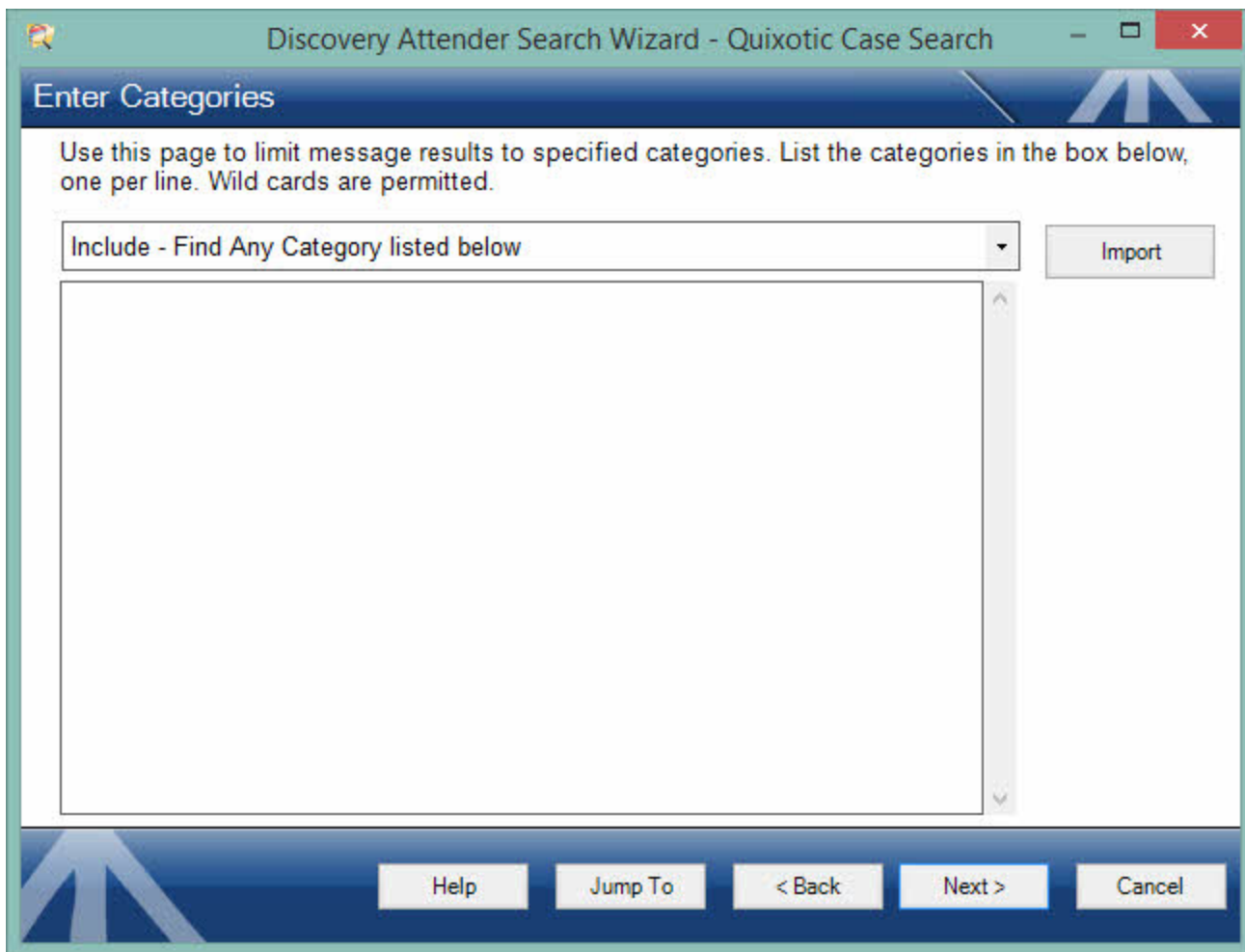
-

See Also

- [Common File Types](#)
- [Main Console](#)
- [Table of Contents](#)
- [Searching Large File Shares](#)

Search Wizard: Enter Categories

This screen will appear when **Categories** has been selected as email criteria on the [Choose Search Criteria](#) page.



Description

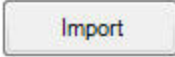
This screen allows you to enter the criteria for searching based on email categories. This criteria listed here will be compared against the category fields of messages where applicable. Not all messages contain categories, and not all versions of Outlook support categories.

- One entry is permitted per line.
- Use of Like and RegEx patterns is permitted.

Options

	Description
Include...	The category of a message must match an entry on the list to be returned as a hit.
Exclude...	Messages will be returned, unless they have a category that matches an entry on the list, in which case it will be ignored.

Buttons

Title	Description
	Allows you to browse for a file which contains a list of file names or types . The file must be a text file (.txt). Entries gathered from the import list file will be added to the wizard line for line.

Context Menu

	Description
Undo	Erases the previous command for the text box
Cut	Removes the selected items from the list and holds them in memory
Copy	Holds the selected item in memory while keeping it in the list
Paste	Takes items from memory and adds them to the selected list
Delete	Removes the selected items from the list but does not keep them in memory
Select All	Selects all items on the list

See Also

- [Table of Contents](#)

Search Wizard: Choose Date Range

This screen will appear when **Date** has been selected on the [Choose Search Criteria](#) page.

Discovery Attender Search Wizard - Demo

Choose Date Range

Discovery Attender will limit results to the date range you specify below.

Date Range

After (>=) Jan 01, 2000

Between

Before (<=) Feb 26, 2020 Show time as part of dates

Use Server Side Filtering

You can choose the specific dates that will be tested in later pages.

Description

You can limit your results so that only items matching specific date criteria are returned. This screen sets the date range. You will have the opportunity to select individual date types on further wizard screens ([Message](#), [Attachment](#) and [File](#) Options).

Date Range:

Use the selection and date controls to limit your date. Dates are in *mmm dd, yyyy* format. When using this criteria, the search will only include items whose dates are:

	Description
After (>=)	After the selected date, starting at midnight (1/1/2020 00:00:00)
Between	Between the date ranges inclusive.
Before (<=)	Before the selected date, ending at the end of the day (12/31/2020 23:59:59)
Use Server Side Fil-	This option enables Server Side Filtering specifically for Date criteria. If

tering

enabled, the data store filters in Exchange or PST files will be used as a first pass in applying the date criteria to the messages being searched. Enabling this option significantly speeds up the search. There are a few scenarios with dates where precision could be lost. We recommend testing Server Side Filtering for dates before deploying it on a production search to verify its functionality in your environment.

If you would like this option enabled or disabled by default, please see the [Settings](#).

Notes

- Checking the '**Show time as part of dates**' option will show the time portion of the date allowing you to fine tune the range. However, keep in mind that dates are searched as they are stored. Email dates are often stored in UTC and not necessarily in local time.
- Enter the date range by directly editing the date. The month field can only be changed with the arrow keys.
- To choose a date using the calendar, click on the arrows on top of the control to move the month, then click on a given date within the month to select it. You can also click on the title date (e.g. May 2020) to choose other months, years or decades.

May 2020						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31	1	2	3	4	5	6

Today: 5/7/2020

Calendar Control

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Choose Size Range

This screen will appear when **Size** has been selected on the [Choose Search Criteria](#) page.

Discovery Attender Search Wizard - Demo

Choose Size Range

Discovery Attender will limit results to the size range you specify below.

Size Range

Larger Than (>=)

Between

Smaller Than (<=)

Size Units:

Use Server Side Filtering

You can choose which items should be tested in later pages.

Description

This screen allows you to limit your results so that only messages, attachments or files matching a specific size criteria are returned. This screen sets the size range. You will have the opportunity to select which result types should match the size criteria on further wizard screens ([Message](#), [Attachment](#) and [File](#) Options).

Size Range:

Use the selection and size fields to limit your search.

	Description
Larger Than (>=)	Results will only include items with sizes greater than the given size
Between	Results will include all items with inclusive sizes between the ranges
Less Than (<=)	Results will only include items whose sizes are less than the given size
Size Units	Use the drop-down arrow to select the units for the size range values. Byte is the default unit.

Use Server Side Filtering

This option enables Server Side Filtering specifically for Size criteria. If enabled, the data store filters in Exchange or PST files will be used as a first pass in applying the size criteria to the messages being searched. Enabling this option significantly speeds up the search. There are few scenarios with size where precision could be lost. We recommend testing Server Side Filtering for sizes before deploying it on a production search to verify its functionality in your environment.

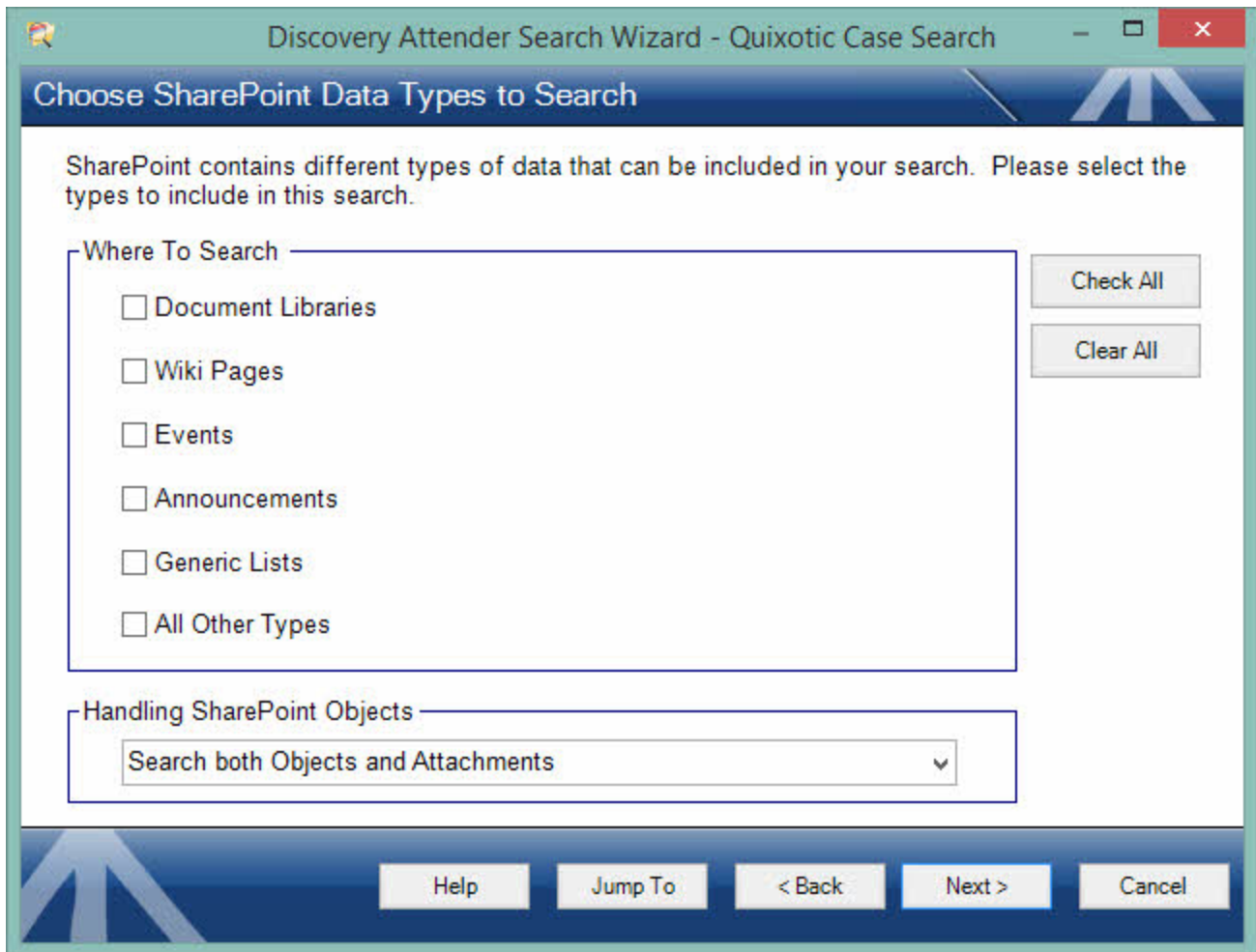
If you would like this option enabled or disabled by default, please see the [Settings](#).

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Choose SharePoint Data Types to Search

This screen will appear if searching SharePoint. Note: Currently only Document Libraries can be searched.



Description

This screen allows you to limit the search to specific data types in SharePoint. Data in SharePoint is stored in libraries, which in turn store specified types of data. Choose the data type options that match those you are trying to search.

Options

	Description
Where to Search	
Document Libraries	This library contains files of any format
Wiki Pages	These are HTML based data stores which can contain attachments links etc.

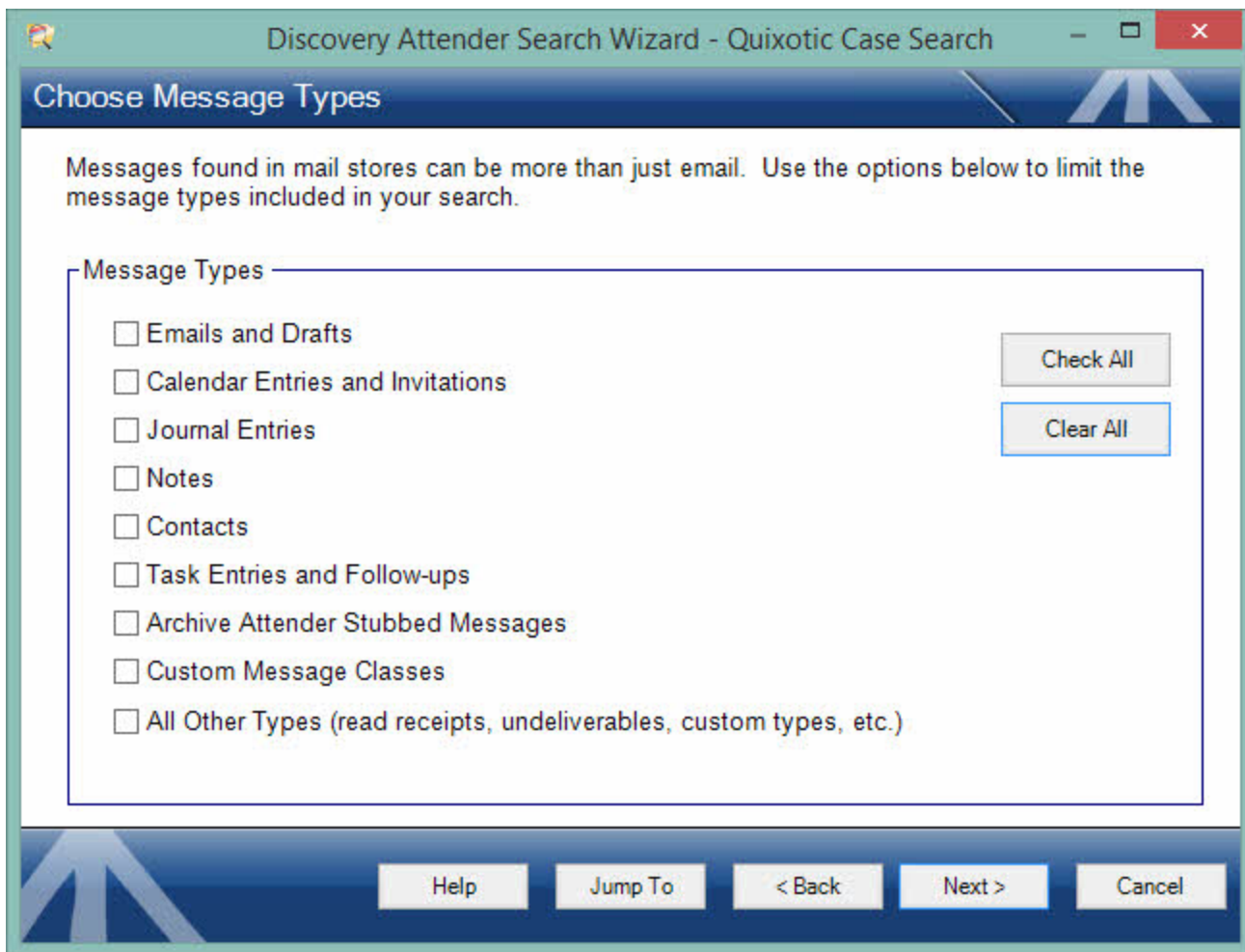
Events	This includes all items in event lists
Announcements	This includes all items in announcement lists
Generic Lists	These are lists which are custom made.
All Other Types	This option will search any type not listed above, including some system types such as 'Groups' or 'People'
Handling SharePoint Objects	<p>These options will tell Discovery Attender how you would like to search objects that contain attachments. Choose from the options listed in the drop down box:</p> <div style="border: 1px solid blue; padding: 2px;"> <p style="background-color: #0070C0; color: white; margin: 0;">Search both Objects and Attachments</p> <p style="margin: 0;">Search Objects Only</p> <p style="margin: 0;">Search Attachments Only</p> </div> <p>Please note: The SharePoint export options in the Settings control the export of attachments and property files</p>

See Also

- [Searching SharePoint](#)
- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Choose Message Types

This screen will appear when **Message Type** has been selected on the [Choose Search Criteria](#) page.



Description

In Microsoft parlance, a 'Message' is an all-encompassing term for all items stored in Exchange or PST based mail stores. There are a variety of message types, and this screen can be used to narrow your search to those types that are required.

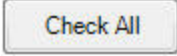
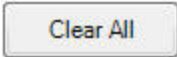
- To include a specific message type, simply check the box of that type. To exclude a type, uncheck the box.
- All standard properties of the selected types will be evaluated, including dates, addresses, and attachments (if selected).
- If the Message Type option is not selected on the [criteria](#) page, **all** message types will be searched by default.

	Description
Emails and Drafts	Includes standard email messages including drafts
Calendar Entries and Invitations	Appointments, Meetings and other calendar entries

Journal Entries	Outlook's diary which keeps track of activities. Please note: This option has nothing to do with Journal messages created by the Exchange journaling service. Those types of messages are handled by options in the settings.
Notes	Outlook's equivalent of sticky notes
Contacts	Entries associated with contacts
Task Entries and Follow-ups	Brief task descriptions
Archive Attender Stubbed Messages	If you employ Sherpa Software's Archive Attender, this option allows you to exclude the stubbed messages (which have already been archived) from your search to make it more efficient. By default these stubbed messages are included in the search.
Custom Message Classes	Allows designation of user specified message classes. If selected, the next wizard screen will allow you to choose which custom classes to include and exclude from your search.
All Other Types	Other non-standard types including custom types, undeliverable items, templates or read receipts

For a more detailed description of exact message classes searched for each type, please see the [properties](#) page.

Buttons

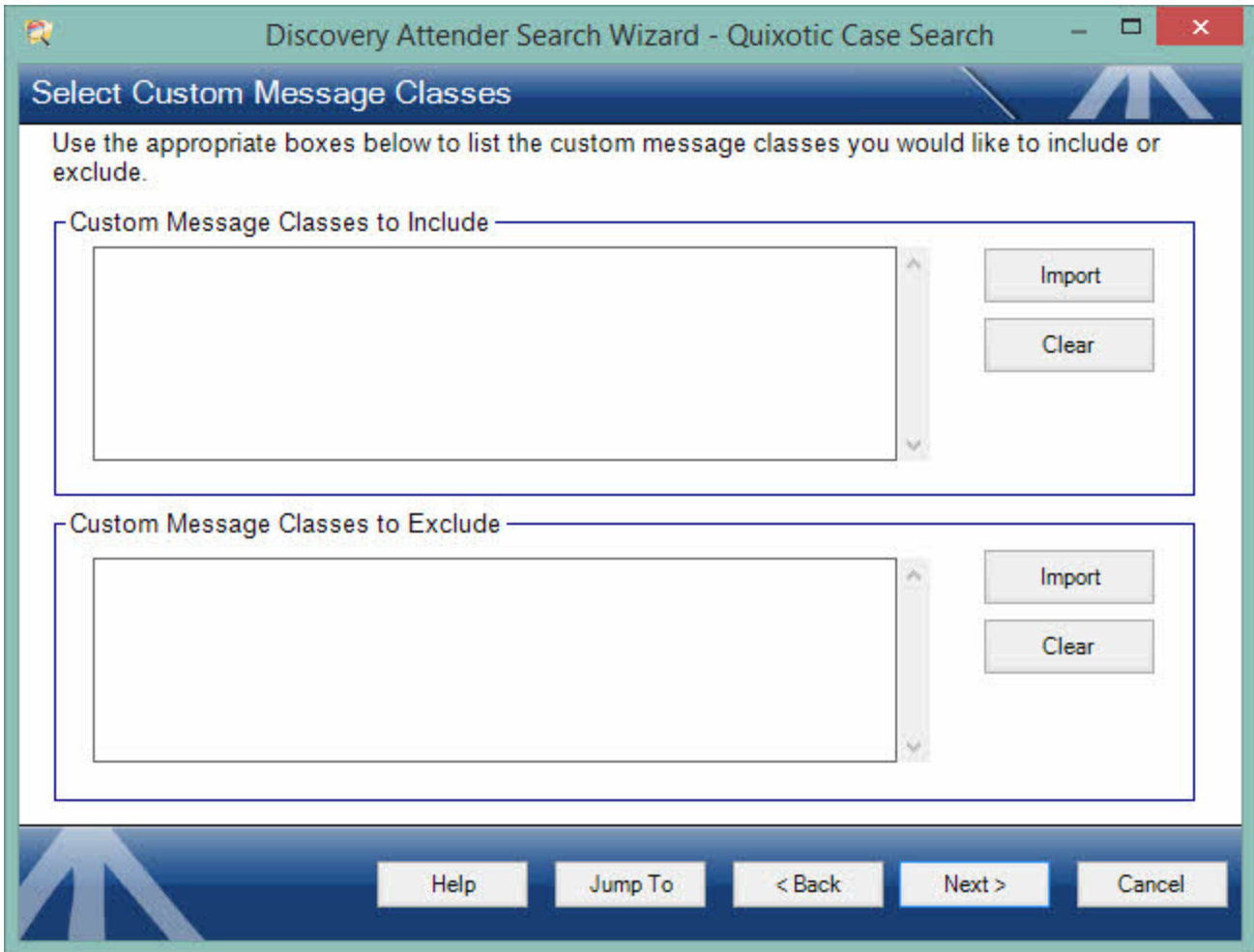
	Select (check) all check boxes in the criteria list
	Un-check all check boxes in the criteria list

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Select Custom Message Classes

This screen will appear by choosing **Custom message classes** in the [Choose Message Types](#) wizard page. It is designed to let you choose custom message classes to include or exclude in your search.



Description

Use the text boxes provided to add a list of custom classes to include or exclude from your search, one per line. This option is useful to include or exclude archived stubbed messages from third party vendors or certain types of encrypted email.

Feel free to use wildcards to help form your inclusion or exclusion lists.

Please note: Use **Include** or **Exclude** but not both.

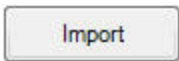
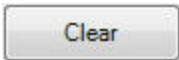
Exchange Document Classes

Exchange and Outlook support many types of message documents. The document types, often referred to as the Message Class define how Exchange and Outlook display and interact with the document. Below is a brief list of the most common document types (message classes) that you may encounter.

IPM.Post	Message posted to a public folder
IPM.Note	Normal email message sent from one user to another

<i>IPM.Note.Secure</i> <i>IPM.Note.SMIME</i>	Encrypted message sent from one user to another
<i>IPM.Note.Secure.Sign</i>	Encrypted and signed message sent from one user to another
<i>REPORT.IPM.*</i>	Message from Exchange indicating a transmission error
<i>IPM.Appointment</i>	A calendar entry
<i>IPM.Schedule.Meeting.Request</i>	Message sent to users requesting their participation in a meeting
<i>IPM.Schedule.Meeting.Canceled</i>	Message sent to users indicating a canceled meeting
<i>IPM.Schedule.Meeting.Resp.Neg</i>	Message response to a meeting request, indicating the user will not participate in the meeting
<i>IPM.Schedule.Meeting.Resp.Pos</i>	Message response to a meeting request, indicating the user will participate in the meeting
<i>IPM.Schedule.Meeting.Resp.Tent</i>	Message response to a meeting request, indicating the user will tentatively participate in the meeting
<i>IPM.Activity</i>	A journal entry
<i>IPM.StickyNote</i>	An Outlook sticky note
<i>IPM.Contact</i>	An entry in the user's contact list
<i>IPM.Task</i>	An entry in the user's task list
<i>IPM.TaskRequest</i>	Message sent to users requesting they add a task to their task list
<i>IPM.TaskRequest.Update</i>	Message sent to users updating a task list item
<i>IPM.TaskRequest.Accept</i>	Message sent in response to a task request, indicating the user will add the task to their list
<i>IPM.TaskRequest.Decline</i>	Message sent in response to a task request, indicating the user will not add the task to their list
<i>REPORT.IPM.Note.NDR</i>	Undeliverable report

Buttons

	Allows the user to import a list of Message Classes.
	Clears the current set of Message Classes.

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Message Options

This screen will appear if Messages are being searched using any Keyword, Date or Size options, as selected on the [Choose Search Criteria](#) page.

The screenshot shows a window titled "Discovery Attender Search Wizard - Demo" with a "Message Options" dialog box. The dialog box is divided into three sections:

- Check Areas to Search for Keywords:**
 - Message Subject
 - Internet Headers
 - Message Body
 - Message Addresses
 - Merge Fields During Search
- Check Dates:**
 - Message Sent
 - Message Created
 - Task / Calendar Start
 - Message Received
 - Message Modified
 - Task / Calendar End
 - Between dates 1/1/2000 and 2/26/2020
 - Include items without dates
- Miscellaneous:**
 - Check the Message Size
 - Has Attachments
 - Larger than 0 Bytes

At the bottom of the dialog box, there are five buttons: Help, Jump To, < Back, Next >, and Cancel.

Description

This page allows you to set options specifically for Message results. You can clarify the criteria for **Keyword**, **Date** or **Size** criteria if these options were chosen on previous wizard screens.

	Description
Keywords	This section allows you to specify the fields within a message which will be searched for keywords. If keywords are not being searched, this section will be disabled.
Message Subject	Search the Subject of the message for a keyword match.
Message Body	Search the Body of the message for a keyword match. Please note: this

	does not include attachments. See Attachment Options for specifying attachment criteria.
Message Headers	Search the Internet Headers of the message for a keyword match.
Message Addresses	Search the Address fields of the message for keywords. This is helpful if you want to search for all items containing a specific address regardless of whether it is in the address or body of a message. Note: If you are searching for a person's name in the keywords, this option should be selected.
Merge Fields During Search	Evaluate all the keyword fields of the message together as one field. Use this option if search expressions are used and you would like to evaluate the criteria against the fields jointly. For example, use the following keyword search expression: 'Blue AND Green' . A sample message has a subject reading "The Sky is Blue" while the body contains the text "The grass was green". If the ' Merge Fields ' option remains unchecked, <i>Discovery Attender</i> will not return a hit. The subject is evaluated independently and does not match the 'Blue AND Green' criteria. The body of the message, reviewed by itself, also will not match the search expression. On the other hand, if the ' Merge Fields ' option is checked, there will be a hit. In this scenario, <i>Discovery Attender</i> evaluates the subject and body fields together. <i>Blue</i> from the subject is matched with <i>Green</i> from the body, successfully completing the keyword criteria. Note: If you are using 'NOT' as part of a search expression, always Merge your message fields.
Dates	This section allows you to specify which message dates will be used to apply the range selected in the Date Range screen . If dates are not being used as criteria, this section will be disabled.
Message Sent	Date the message was sent
Message Received	Date the message was received
Message Creation	Date the message was created. Please note: Message creation dates are not strong criteria and they are not enabled by default.
Message Modification	Date the message was last modified. Please note: Message modification dates are not strong criteria and they are not enabled by default.
Task/Calendar Start	Date a task or calendar entry is set to start
Task/Calendar End	Date a task or calendar entry is set to end

Include Items without Dates	<p>When enabled, this option ensures Discovery Attender will include all items without dates (e.g. Drafts) with the data set provided the match the other criteria.</p> <p>When disabled (the default) items without dates are ignored and are not searched.</p>
Miscellaneous	
Size	<p>Enable this option to indicate that Messages should be checked against the size criteria. If size criteria was not selected, this section will be disabled.</p>
Has Attachments	<p>This option will ensure only messages which have attachments will be searched.</p> <p>If this option is disabled (the default), all messages are searched, regardless of whether they have attachments.</p>

For more details on specific MAPI fields searched for each item, see the [properties](#) page.

-

See Also

- [Properties](#)
- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Attachment Options

This screen will appear if **Email Attachments** are being searched, as selected on the [Specify Email Options](#) page.

Discovery Attender Search Wizard - Quixotic Case Search

Attachment Options

Check Areas to Search for Keywords

Attachment Name
 Attachment Body
 Merge Fields During Search

Nested Attachments

Check Dates

Attachment Created
 Attachment Modified
Between dates 5/1/2016 and 5/15/2017

Check Size

Check The Attachment Size
Larger than 0 Bytes

Match Source Message Criteria

Message Addresses
 Message Dates
 Message Classes

Description

This page allows you to set options specifically for Attachment results. You can clarify the criteria for Keyword, Date or Size criteria if they were chosen on previous wizard screens.

	Description
Keywords	This section allows you to specify the fields within an attachment which will be searched for keywords. If keywords are not being searched, this section will be disabled.
Attachment Name	Search the name and label of the attachment for keywords.
Attachment Body	Search the body of the attachment for keywords. The attachment body is searched as a file.
Nested Attachments	If attachments are nested, such as within an attached email, this option will allow you to search through all the nested items. For attached email, subject and body will be searched at each level.

<p>Merge Fields During Search</p>	<p>Evaluate all the keyword fields of the attachments together as one field. Use this option if search expressions are used and you would like to evaluate the criteria against the fields jointly.</p> <p>For example, use the following keyword search expression: 'Blue AND Green'. A sample attachment has a file name of "blue.doc" while the body contains the text "The grass was green".</p> <p>If the 'Merge Fields' option remains unchecked, <i>Discovery Attender</i> will not return a hit. The file name is evaluated independently and does not match the 'Blue AND Green' criteria. The body of the attachment, reviewed by itself, also will not match the search expression.</p> <p>On the other hand, if the 'Merge Fields' option, is checked, there will be a hit. In this scenario, <i>Discovery Attender</i> evaluates the file name and body fields together. <i>Blue</i> from the file name is matched with <i>Green</i> from the body, successfully completing the keyword criteria.</p> <p>Note: If you are using 'NOT' as part of a search expression, it is recommended to merge the fields.</p>
<p>Dates</p>	<p>This section allows you to specify which Attachment dates will be used to apply the range selected in the Date Range screen. If dates are not being used as criteria, this section will be disabled.</p> <p>Please note: Attachment creation and modification dates do not necessarily reflect the dates of the original file. Some email systems will use the date of insert as the creation and/or modification date, while others use the original file dates. There is no standard rule for setting these dates.</p>
<p>Attachment Created</p>	<p>Recorded date of the attachment creation - see note above.</p>
<p>Attachment Modified</p>	<p>Recorded date of the attachment last modified date - see note above.</p>
<p>Size</p>	<p>Enable this option to indicate that Attachments should be checked against the size criteria. If size criteria was not selected, this section will be disabled.</p>
<p>Match the Source Message Criteria</p>	<p>These options are available to limit attachments to those items from messages that match the source message criteria.</p>
<p>Message Addresses</p>	<p>By checking this option, the attachment will only match if the source message addresses match the address criteria as chosen on the Choose Addresses page.</p>
<p>Message Dates</p>	<p>By checking this option, the attachment will only match if the message date options as chosen on the Message Options page fall into the date range set for these options.</p>
<p>Message Classes</p>	<p>By checking this option, the attachment will only match if the message class matches the message class criteria as chosen on the Message Types wizard page.</p>

For more detail on specific MAPI fields searched for each item, see the properties page.

See Also

- [Choose Addresses](#)
- [Message Options](#)
- [Message Types](#)
- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: File Options

This screen will appear if you have selected **Files on Network Shares, Hard Drives or Local Machines** on the [Select Areas to Search](#) page.

The screenshot shows a window titled "Discovery Attender Search Wizard - Quixotic Case Search" with a "File Options" header. The window contains three sections for configuring search criteria:

- Check Areas to Search for Keywords:** Includes checkboxes for "File Name" (checked), "File Body" (checked), and "Directory (Folder) Names" (unchecked). A separate box contains the "Merge Fields During Search" checkbox (unchecked).
- Check Dates:** Includes checkboxes for "File Created" (checked) and "File Modified" (checked). Below these is the text "Between dates 5/1/2016 and 5/15/2017".
- Check Size:** Includes the checkbox "Check the File Size" (checked) and the text "Larger than 0 Bytes".

At the bottom of the window, there are five buttons: "Help", "Jump To", "< Back", "Next >", and "Cancel".

Description

This page allows you to set options specifically for File results. You can clarify the criteria for Keyword, Date or Size criteria if they were chosen on previous wizard screens.

	Description
--	-------------

Keywords	This section allows you to specify the fields within a file which will be searched for keywords. If keywords are not being searched, this section will be disabled.
File Name	Search the name of the File for keywords. Note: if you want to exclude or include certain file types, use the File Name and Type criteria.
File Body	Search within the body of the File for keywords.
Directory Names	Return directories as hits if their name matches the keywords. Please note: no actions can be performed on the directory results, although their counts will be noted in the general result tally.
Merge Fields During Search	Evaluate all the keyword fields of the files together as one field. Use this option if search expressions are used and you would like to evaluate the criteria against the fields jointly. For example, use the following keyword search expression: <i>'Blue AND Green'</i> . A sample file has a file name of <i>"blue.doc"</i> while the body contains the text <i>"The grass was green"</i> . If the 'Merge Fields' option remains unchecked, <i>Discovery Attender</i> will not return a hit. The file name is evaluated independently and does not match the <i>'Blue AND Green'</i> criteria. The body of the file, reviewed by itself, also will not match the search expression. On the other hand, if the 'Merge Fields' option, is checked, there will be a hit. In this scenario, <i>Discovery Attender</i> evaluates the file name and body fields together. <i>Blue</i> from the file name is matched with <i>Green</i> from the body, successfully completing the keyword criteria. Please note: If you are using 'NOT' as part of a search expression, it is recommended to use this option.
Dates	This section allows you to specify which File dates will be used to apply the range selected in the Date Range screen . If dates are not being used as criteria, this section will be disabled.
File Created	System date of the File creation. Please note: The file creation date of source data sometimes is greater than the modification date. This happens sometimes when data is copied by certain programs (e.g. Windows Explorer) which change the creation date of the newly created copy
File Modified	System date of the File last modified date.
Size	Enable this option to indicate that Files should be checked against the size criteria. If size criteria was not selected, this section will be disabled.

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: SharePoint Filter Options

This screen will appear if the Users or Lists options from the **SharePoint Criteria** section were selected on the [Choose Search Criteria](#) page.

The screenshot shows a window titled "Discovery Attender Search Wizard - Quixotic Case Search" with a sub-header "SharePoint Filter Options". Below the sub-header is a text instruction: "Add the appropriate SharePoint filter criteria to the boxes below, one per line. Wildcards can be used." There are two main sections: "User Names" and "List Names". Each section contains a radio button for "Include" (which is selected) and a radio button for "Exclude". To the right of each radio button is a large, empty text area for entering filter criteria. At the bottom of the window is a navigation bar with buttons for "Help", "Jump To", "< Back", "Next >", and "Cancel".

Description

This screen allows you to limit your results so that only items matching a specific user name or SharePoint list are returned. The names and/or lists can be filtered to either *Include* or *Exclude* the pertinent data.

Options

Use the appropriate text box to limit the SharePoint User Names or List Names. To enter multiple values, put one entry per line. Be sure to select the **Include** or **Exclude** option to accurately reflect your choice.

	Description
User	The name(s) of the user whose documents you wish to filter or exclude.

Names	
List Names	The list name(s) where documents exist that you wish to either include or exclude in your search.

See the SharePoint searching [summary](#) for more details on lists and users.

See Also

- [Searching SharePoint](#)
- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: SharePoint Options

This screen will appear if you have selected **Search SharePoint** on the [Select Areas to Search](#) page.

Discovery Attender Search Wizard - Quixotic Case Search

SharePoint Options

Check Areas to Search for Keywords

Name Body Merge Fields During Search

All Properties

Check Dates

Created Date Modified Date

Between dates 5/1/2016 and 5/15/2017

Check Size

Check the SharePoint Item Size Larger than 0 Bytes

Users

Created By Modified By

Miscellaneous

Old Versions

Help Jump To < Back Next > Cancel

Description

This page allows you to set options specifically for all types of SharePoint results. You can clarify the criteria for Keyword, Date or Size criteria if they were chosen on previous wizard screens.

	Description
Keywords	This section allows you to specify the fields within a SharePoint file which will be searched for keywords. If keywords are not being searched, this section will be disabled.
Name	Search the name of the SharePoint file for keywords. Note: if you want to exclude or include certain file types, use the File Name and Type criteria.
Body	Search within the body of the File for keywords.
All Properties	This option will allow Discovery Attender to search all the properties for the SharePoint objects being searched. This includes many system properties and can add significant time to the search
Merge Fields During Search	<p>Evaluate all the keyword fields of the files together as one field. Use this option if search expressions are used and you would like to evaluate the criteria against the fields jointly.</p> <p>For example, use the following keyword search expression: 'Blue AND Green'. A sample file has a file name of "blue.doc" while the body contains the text "The grass was green".</p> <p>If the 'Merge Fields' option remains unchecked, <i>Discovery Attender</i> will not return a hit. The file name is evaluated independently and does not match the 'Blue AND Green' criteria. The body of the file, reviewed by itself, also will not match the search expression.</p> <p>On the other hand, if the 'Merge Fields' option, is checked, there will be a hit. In this scenario, <i>Discovery Attender</i> evaluates the file name and body fields together. <i>Blue</i> from the file name is matched with <i>Green</i> from the body, successfully completing the keyword criteria.</p> <p>Please note: If you are using 'NOT' as part of a search expression, it is recommended to use this option.</p>
Check Dates	This section allows you to specify which File dates will be used to apply the range selected in the Date Range screen . If dates are not being used as criteria, this section will be disabled.
Created Date	The date the file was created according to SharePoint
Modified Date	The date the file was last modified according to SharePoint
Size	Enable this option to indicate that the SharePoint files being searched should be checked against the size criteria. If size criteria was not selected, this section will be disabled.

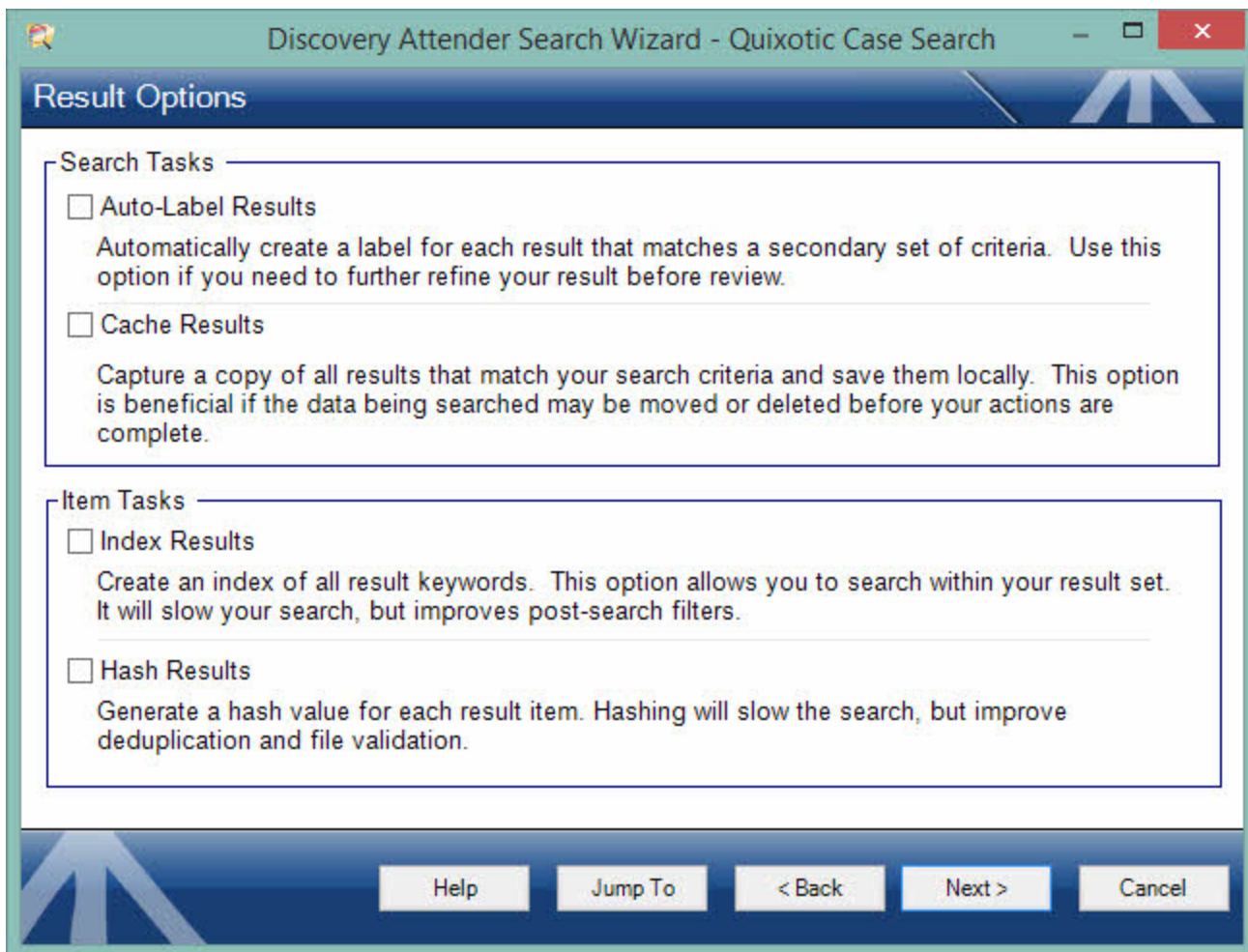
Users	This sections allows you to specify which user properties will be used to compare to the SharePoint Filter Options
<i>Created By</i>	The value stored in the SharePoint 'Created By' property, usually the first person to add or create the file in SharePoint.
<i>Modified By</i>	The value stored in the SharePoint 'Modified By' property, usually the last person to change the file in SharePoint.
Miscellaneous	
<i>Old Version</i>	<p>Enabling this option will search old versions of files that are stored in SharePoint.</p> <p>Note:</p> <ul style="list-style-type: none"> • This option can add significant time to the search. • Not all files have previous version storage enabled. • Discovery Attender can only search older version less than 100 MB in size.

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Result Options

This screen will appear for all searches, although some options may be disabled based on criteria that has been chosen in previous screens.



Description

This screen allows users to select various result options to help with post-search tasks. Keep in mind that each of these options, although useful, will add significant time to the search duration. All of these selections are optional.

Options

	Description
Search Tasks	
Auto Label Results	This option enables the Auto Label wizard page where you can enter a secondary set of criteria to apply to your result set while the search is running. For example, if your primary search is based on keywords, you can label all items containing a

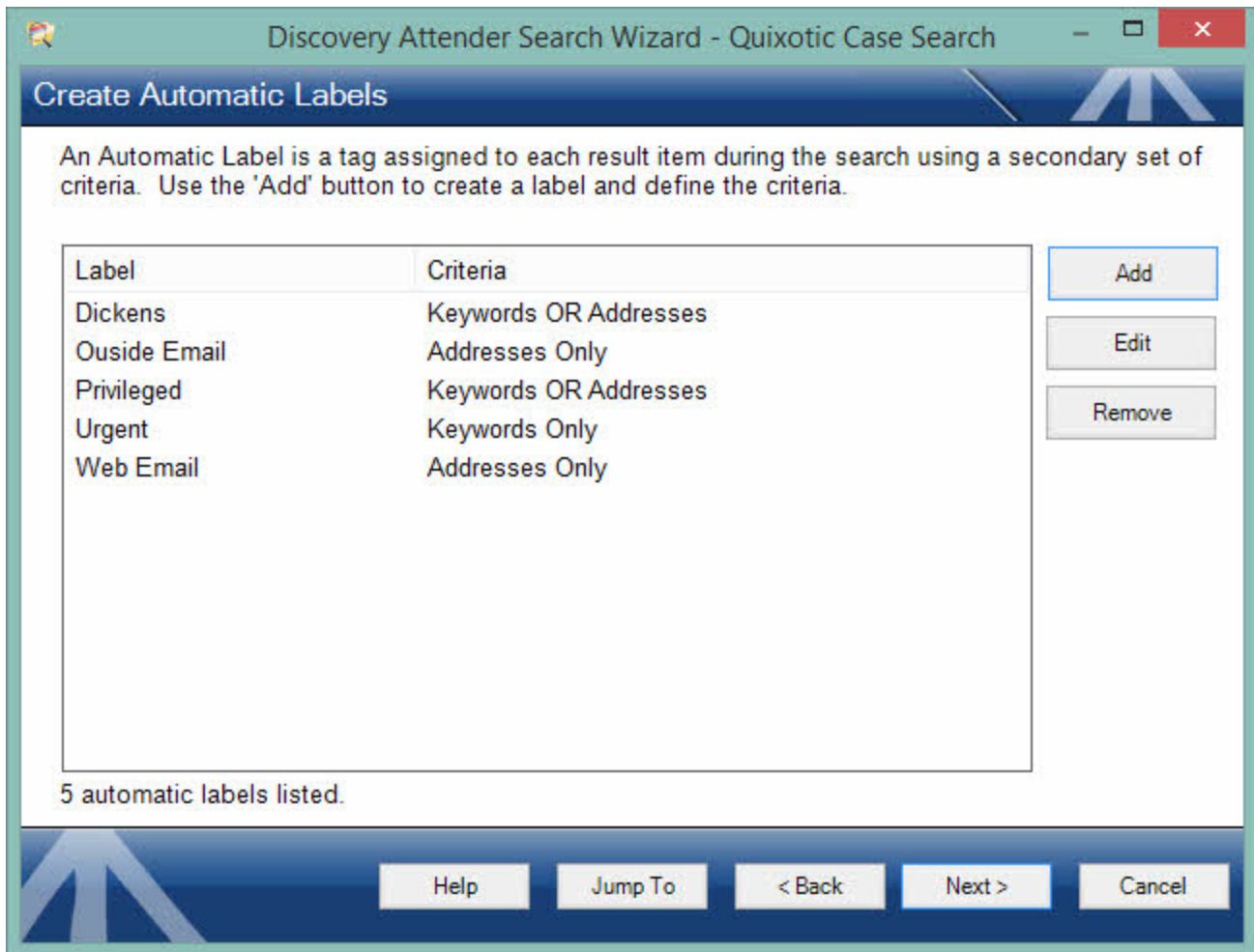
	<p>specific address. These labeled items can then be found in the By Label node of the Results.</p> <p>Please note: Labeling is accomplished within the <i>Discovery Attender</i> database. The source or exported items are <i>never</i> modified or overwritten by creating a label.</p>
Cache Results	<p>This option creates a local cache of all result items at the time of your search. This cache of results is stored within the project structure for easy linking even if this machine no longer has access to the source data. Please see Caching Results for more detail.</p> <p>Please note:</p> <ul style="list-style-type: none"> • Using this option can take up significant amount of space. Make sure you have run a sample search to extrapolate the amount of data that may be stored with your project. • Results are automatically cached for results extracted from Exchange 365 mailboxes, regardless of the setting of this option.
Item Tasks	
Index Results	<p>This option creates an index of words to help users search within the result set for keywords after the search is complete using an Advanced Result Filter. Each message, attachment and file which has matched the criteria will be included in the index.</p> <p>Keep in mind, this is the most resource intensive of all the Result Options as indexing will add significant time to your search. Before selecting this option, be sure you have adequate storage space in your project directory to include the projected size of the index.</p>
Hash Results	<p>This option creates an hash value for each result hit at the time of the search. The hash is stored in the database and is useful for deduplicating and validating options.</p> <p>Note: The option is on by default and they types of hashes used can be set in the Settings under the Results Node.</p>

See Also

- [Result Management](#)
- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Create Automatic Labels

This screen will appear when **Auto-Label Results** is selected on the [Result Options](#) page.



Description

This screen allows you to create a secondary set of criteria which can be applied to your search results. To identify items found with this criteria, automatic labels are generated and stored with the results. Automatic labels are helpful for reporting, finding privileged data, outside email, web based email and other tasks that cannot be completed in the main search.


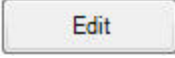
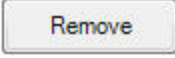
Please note: At no time is the source data modified to create any of the labels.

Columns

Label	Criteria
Dickens	Keywords OR Addresses
Outside Email	Addresses Only
Privileged	Keywords OR Addresses
Urgent	Keywords Only
Web Email	Addresses Only

	Description
Label	Label that was selected for this Automatic Label
Criteria	Type of criteria selected for this Automatic Label.
Keywords OR Address	Both Keyword and Address criteria will be evaluated. If either matches, the result item will be labeled
Keywords AND Address	Both Keywords and Address criteria will be evaluated. Both must match for the result item to be labeled
Keyword Only	Only Keyword Criteria is evaluated
Address Only	Only Address Criteria is evaluated

Buttons

	Description
	Click this button to open the Automatic Label edit form to create a new automatic label to add to the list. You will need to create a label for each set of criteria you wish to automatically label.
	The edit button permits the administrator to change an already-existing autolabel.
	The remove button permits the administrator to delete an already-existing autolabel.

See Also

- [Automatic Labels](#)
- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Search Wizard: Schedule Your Search

This screen is the last page of every search setup wizard.

Discovery Attender Search Wizard - Demo

Schedule Your Search

Congratulations, you have finished setting up your search. You have the option to show the summary or save this search as a template.

The last step is to schedule your search. Select an option below and click 'Finish' to start or save your search.

When To Search

Save and start this search immediately

Only save this search, I will manually start it later

Save and start at the following time and date: 03:39 PM - Mar 07, 2020

Options

Show Summary Save as Template

Help Jump To < Back Finish Cancel

Description

This is the last step of the creation of a search. Select an option for *When to Search*, then click the **FINISH** button to complete the search setup.

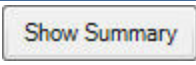
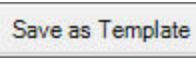
All three timing options save the search to the database once the **FINISH** button is clicked. If there are errors in storing or validating the search (e.g. required elements not present), a message will be shown detailing the issue. If clicking **OK** on the message box does not take you to the faulting screen, use the [navigation buttons](#) to resolve your issue.

Please note: If you have many locations to search, or if you expect numerous results, you might want to schedule your search for an off-peak time. Running long searches can tie up a computer for hours. In addition, PST files can only be accessed when they are not in use by other users. Please see the [Best Practices](#) for other tips on optimizing your search.

Options

When to Search	
Save and start this search immediate	Launches the search process with no delay (default) as soon as the FINISH button is clicked.
Only save this search, I will manually start it later	Search is saved and inserted into the search list on the Main Console with the status of <i>Not Yet Started</i> . The search can be started manually at a later time by selecting <i>Manual Start</i> from the main form.
Save and start at the following time and date:	Saves the search and schedules a start on the date and time chosen in the calendar control. To set the date and time, you can directly edit the value or click on the down arrow to bring up the calendar control.

Buttons

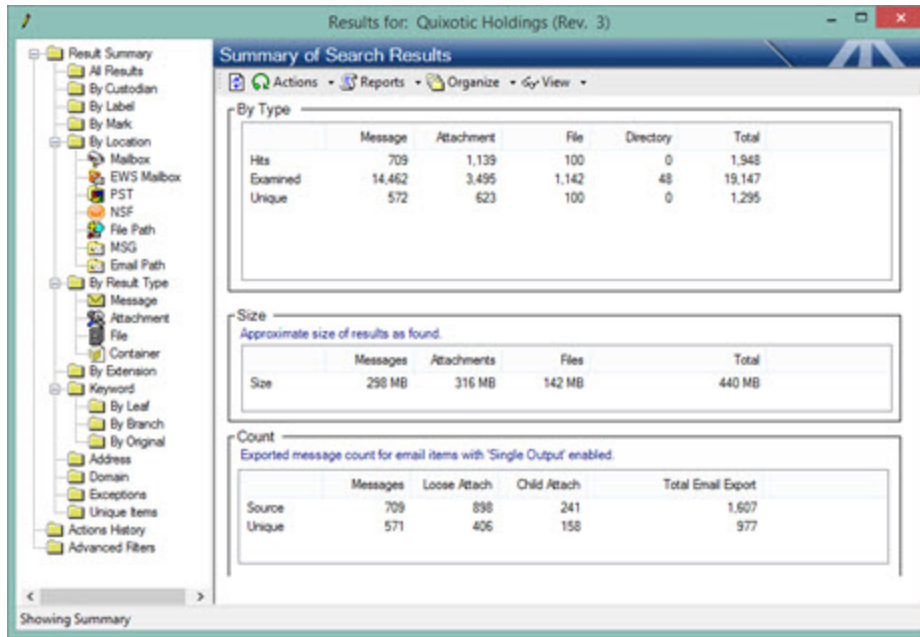
	Opens a simple text description of the search criteria. If changes need to be made, click on the navigation buttons until the appropriate wizard page is reached.
	Saves the search from this wizard as a template

See Also

- [Navigation Buttons](#)
- [Search Wizard Overview](#)

Result Management

The Result Management view provides the functionality to examine, organize and export results. It contains many easily accessible features (exports, organization), views and reports.



This screen can be accessed by highlighting a search in the [Main Console](#) and selecting the *Result Management* option from the toolbar or context menu. Alternately, double-clicking on any search in the Search View will open this management screen. Only one result management screen can be open at a time.

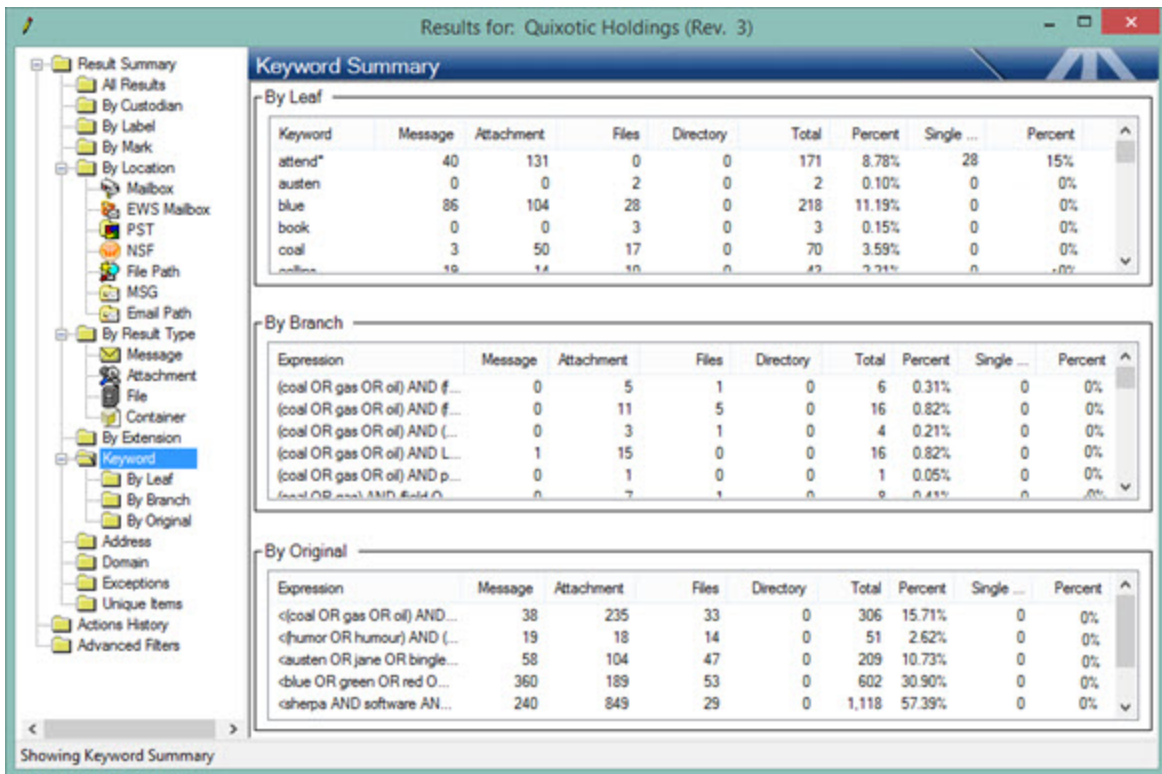
To help navigate, organize and export your results, please see the sections below:

Overview	Introduction to the sections of the Result Management screens
Navigation Tree Nodes	Listing of each node and its function. Contains links to expanded explanations of each Form View.
Menu and Toolbar Options	Many of the individual view screens have toolbars and menus which are similar and share the same functionality. Descriptions of these menus and toolbar items can be found here .
What to Do With Your Results	Summary of what can be done with your results
Summary Page	Expanded description of the Summary of Search Results form view.

For general information about tasks that can be performed in the Results, see the pages below:

Actions	Open, Export, Deduplicate and Ignore result items
Organization	Label, Mark and Annotate result items
Reports	Consolidate and export information about the search and result set in HTML, Text, or CSV format
Views	Details available on an Item Level

Overview



The main Results screen is broken up into two sections; to the left is the [Result Navigation Tree](#) which is used to select views to populate the right half of the screen. Values in the tree will vary depending on the details of the search (location, types of results, and result options) and actions performed (Deduplication, Label). The right half of the screen contains the *Form View* for the selected node.

Note: Not all options are available in all views!

Form View

The form view usually consists of a [Title](#), [Toolbar](#), [Context Menu](#) and [Information Layout](#).

Title

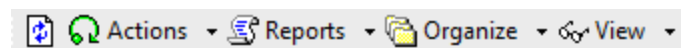
The title of the Form View provides a description of the enabled view. In the example above, the *Result Summary* node has opened *Summary of Search Results* view:



Results: Form View - Title Banner

Toolbar

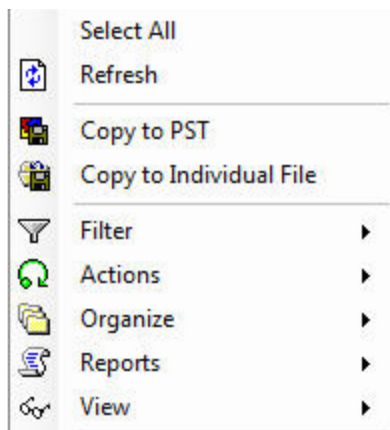
In addition to the title, each view has a toolbar which changes based on the node selected. The toolbar options can be accessed by clicking on the required button. A description of the toolbar options can be found [here](#).



Results: Summary of Search Results: Tool bar

Context Menu

In addition to the tool bar, many views have a *context-menu* with matching [functionality](#). To use the context menu instead of the toolbar, simply right-click on a view or selected item.



Results: All Results: Context Menu

Information Layout

This section displays the summary or item details as selected in the tree. There are two basic types of layouts, Summary Views and Detail Views. The Summary Views provide detail on an aggregate level, while the Detail Views show lists of individual items. The example below is a Summary view:

By Type

	Message	Attachment	File	Directory	Total
Hits	709	1,139	100	0	1,948
Examined	14,462	3,495	1,142	48	19,147
Unique	572	623	100	0	1,295

Size

Approximate size of results as found.

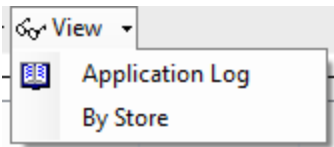
	Messages	Attachments	Files	Total
Size	298 MB	316 MB	142 MB	440 MB

Count

Exported message count for email items with 'Single Output' enabled.

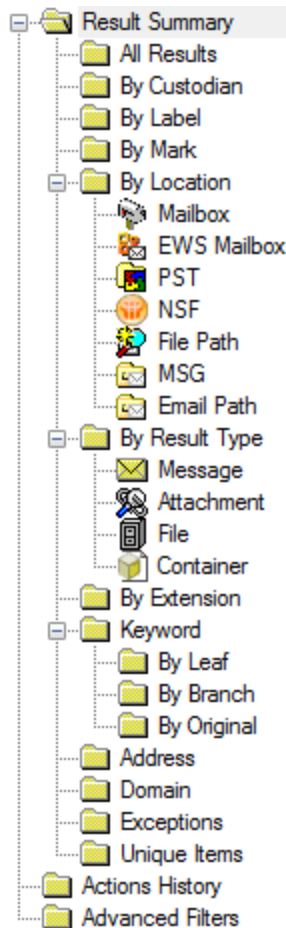
	Messages	Loose Attach	Child Attach	Total Email Export
Source	709	898	241	1,607
Unique	571	406	158	977

Note: The By Store section from previous versions can be accessed via the 'View' | 'By Store' option.



Results: Summary of Search Results: Information Layout

Navigation Tree Options



Node	Description
All Results	Listing of all results with basic information
Unique Items	Optional node listing unique results after a deduplication action has been completed.
By Custodian	Listing of results by Custodian. For more information on creating and assigning custodians, see Custodian Management .

By Label	Summary of the results which have been labeled, either as part of the search (auto-label) or with the labeling functionality.
Label Detail	Each label associated with results has its own node. The node opens a label detail form which lists all the results for that label.
By Location	Listing of locations with an aggregate summary per location. Under this will be a sub-node per location type searched (Mailbox, Public Folder, PST, File Path). If certain types were not included in the search, you will not see the node. In the example above, only PSTs and File paths were searched.
Location Detail	Each location in the search has a node which lists the results for that individual Mailbox, Public Folder, PST or File Path.
By Result Type	This view is a place holder for the Detail Forms. Click on one of the sub-nodes to select a result type
Messages	Listing of all messages in the result set with message specific details. Only present if Messages were searched.
Attachments	Listing of all attachments in the result set with attachment specific details. Only present if Attachments were included as part of the search.
Files	Listing of all the loose files in the result set with file specific details. Only present if the Hard Drive or Network Share was included in the search.
Container Items	Lists all the items found in compressed files, whether they were a hit or not. This is only present if the correct options were selected.
By Extension	Lists the extension groupings that were found during the search.
Keyword	Summary of the keyword criteria by individual leaf, branch, or original expression. The keyword list will be populated only if the Keyword criteria was selected.
Address	Summary of all addresses found in the result set. The Address list will only have values if a) messages or attachments are being searched and b) The option is set to keep address details.
Exceptions	This node is a mirror of the Combined Exception log accessed from the main console. It lists all the exceptions encountered when the search is run.
Actions History	Listing of each action undertaken for this result set.
Advanced Filter	Manages and lists advanced filters
Filter Detail	Listing of results associated with the advanced filter of the tree node.

The nodes available in the navigation tree are based upon several factors:

- [Types of results](#) returned
- [Locations](#) chosen
- [Result Options](#) selected
- [Actions](#) initiated
- [Advanced Filters](#) created
- [Deduplication](#) enabled

What To Do With Your Results

Now that you have searched your data, what can you do with your results? Here are some ideas:

Search Within Result Set (Advanced Filter)	Delve further into your data by searching the result set for keywords (if the search was indexed), addresses and dates.
Export Results (Actions)	Via the Actions menu, you can export results to a PST , NSF or Individual File .
Organize	You can label, filter, annotate and mark the result items based upon your process and preferences. Additionally, you can run a deduplication process to exclude all duplicates from your result set, or assign a custodian to help group your results.
Report	Generate reports for yourself or your end users. Discovery Attender offers simple CSV exports or more advanced HTML Summary, List, Detailed and Duplicate reports
Views	Get acquainted with your result set by using the variety of views on both the aggregate (by Keyword , Address , Custodian , Result Type , By Location) or individual result (Item Details , Keyword Details) level.

Organizing Results

Discovery Attender provides tools within the [Result Management views](#) for users to organize, group and filter their results.

Apply Labels

Allows the users to organize items by tagging them individually with customizable labels.

- Labeled items are then shown in the [By Label](#) view.
- Multiple labels can be applied to any item and all labels can be associated with any result item.
- You can add or manage labels in the [Settings](#) screen on the Results | Organization Tab. You will need to close and reopen the Results Management screen for the labels lists to repopulate with new entries.
- Labels can be assigned to all Family Members of an email group.
- Labels can also be created with [automatic labels](#) during the search.

To assign a label to selected results, highlight the results, then choose *Organize | Apply Label | [Label]* option from the Context menu (see below): Alternately, from the toolbar, choose *Organize | Label*

Labels can only be removed from the ['By Label'](#) view. To remove a label, navigate to the view for the label. Select the result or results you wish to remove the label from, then select *Organize | Apply Label | Remove Label*.

Mark Items

Notates a result item with a fixed icon or mark. Marks help to organize items for users and the associated text will appear in reports as 'Marked As'.

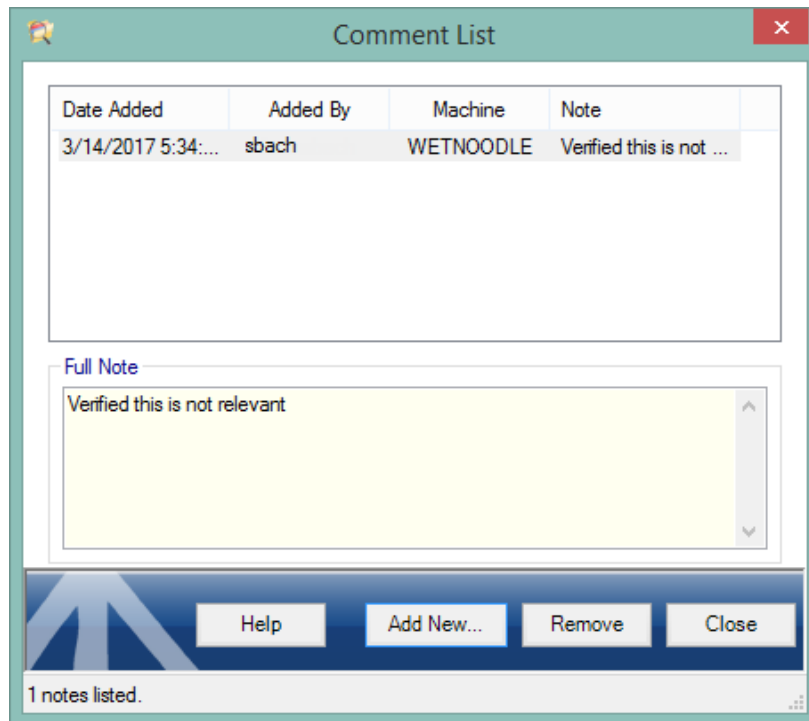
- Each result can have only one mark at a time.
- Result views can be filtered using these marks.

- See the [Organization node](#) in the Settings to associate the icons with user selected descriptions. You will need to close and reopen the Results Management screen for the mark text to update with the new associations. Please note: changing the text will change the text associated with these items in the reports.

To assign a mark to selected results, highlight the results, then choose *Organize | Mark | [Icon]* option from the Context menu : Alternately, from the toolbar, choose *Organize | Mark*.

Annotate

The organization of searches and results can be enhanced by adding descriptive notes or comments to a search or individual result items.

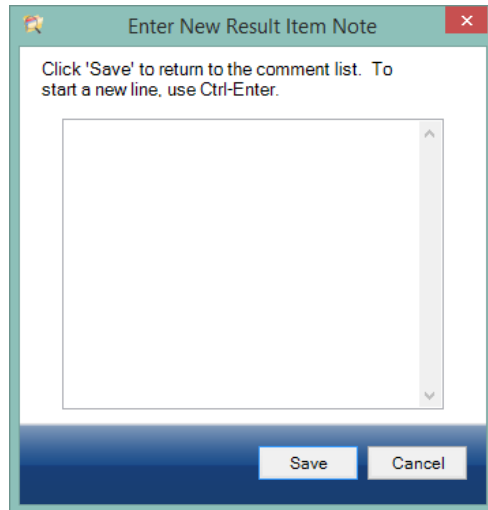


- These comments are stored in the database with other search and results details.
- Notes can be viewed, added or removed.
- Search notes will appear on both the detail and summary reports. Result Item notes only appear on the detail report.
- When a Result Item has a note, the 'Notes' column in the '[All Results](#)' view is incremented to the note count.

<i>Date Added</i>	Date the comment was added to the item.
<i>Added By</i>	Login of the user who added the comment.
<i>Machine</i>	Name of the computer that hosts the installation was used to create these comments
<i>Note</i>	First line of the comment. The entire comment will appear in the 'Full Note' box when that item is selected

Add New

Opens the New Note dialog box where text can be entered.



Enter the comment into the box. Click 'Save' store the comment. 'Cancel' will return you to the Comment list without retaining any data.

Remove





Removes the selected comment from the list.

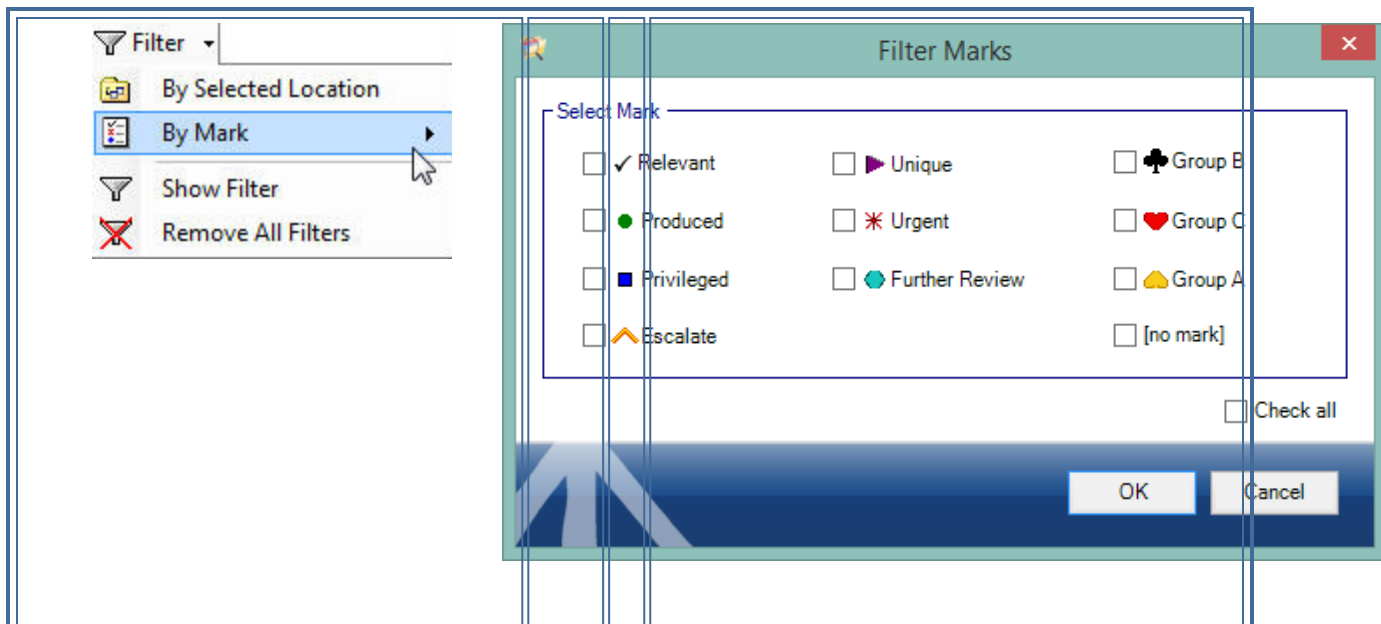
Close

Closes the Comment List dialog and returns focus to the originating form.

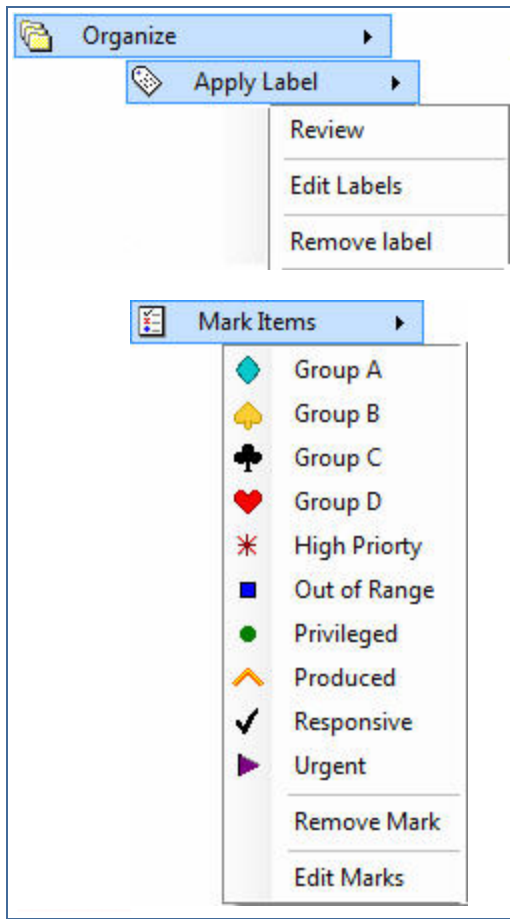
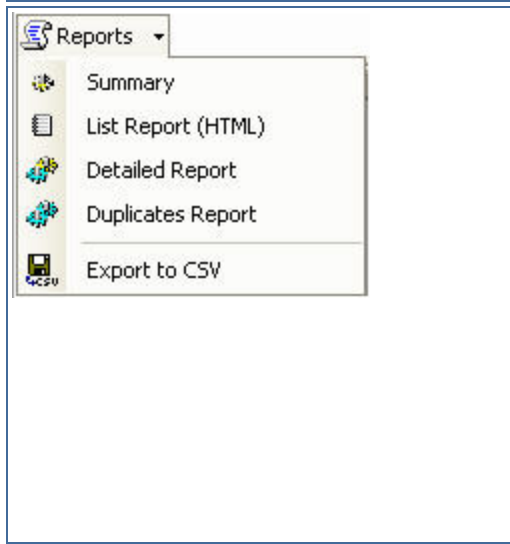
Results: Toolbar and Menu Options

The menus and toolbars in many of the Results views share functionality. Features in the toolbar are mirrored in the context menus. Use the list below as a guide to toolbar and menu functionality.

Icon	Text	Hot key	Description
	Refresh List	F-5	Updates the result details
			Apply a filter to show all Message Results in the View
			Apply a filter to show all Attachment Results in the View
			Apply a filter to show all File Results in the View
	Filter By Mark		This menu manages which marks are shown on the screen. If checked, the results which that mark are shown. If unchecked, then .



	Actions	Description
	<p><u>Actions</u></p>	<ul style="list-style-type: none"> • <u>Open Item</u> - Opens the selected item • <u>Copy to PST</u> - Copies selected results to a user selected PST file • <u>Copy to Individual File</u> - Copies selected results as a file to a user-selected location • <u>Ignore Item</u> - Sets the selected items to 'Ignore' so it will not be exported or included in any reports • <u>Un-Ignore Item</u> - Resets the selected items so they will no longer be ignored. • <u>Deduplicate</u> - Starts a wizard to guide you through the process of identifying duplicates in the result set. • <u>Reset Actions</u> - Changes the status of selected items to 'Normal' • Advanced - These options are only available if Advanced Actions are chosen in the <i>Tools Settings Export Actions</i> node. • <u>Move to PST</u> - Moves the selected item to a PST file • <u>Move to File/MSG</u> - Moves the selected items to a individual file in a user defined location. • <u>Delete</u> - Deletes the item from the source location.

 <p>The screenshot shows the 'Organize' menu with two sub-menus open. The 'Apply Label' sub-menu contains 'Review', 'Edit Labels', and 'Remove label'. The 'Mark Items' sub-menu contains a list of icons and labels: Group A (blue diamond), Group B (yellow diamond), Group C (black club), Group D (red heart), High Priority (red asterisk), Out of Range (blue square), Privileged (green circle), Produced (orange arrow), Responsive (black checkmark), Urgent (purple triangle), 'Remove Mark', and 'Edit Marks'.</p>	<p>Organize</p>	<p>F-6 - F-1-1 1</p>	<ul style="list-style-type: none"> • Apply Label - Applies the chosen label to the selected (highlighted) items • Mark Items - Marks (associates) the item with the selected icon • Annotate - Opens the 'Annotate Item' screen which allows the user to see and add notes to the individual result item. See Annotation for more detail. <p>Note:</p> <ul style="list-style-type: none"> • The Edit Labels and Edit Marks options will open the Organization screen in the settings allowing the user to add, associate or remove labels or marks as appropriate. The available list of labels and marks will be updated accordingly. • Only the By Label sub-view has the Remove Label option.
 <p>The screenshot shows the 'Reports' menu with a list of options: Summary, List Report (HTML), Detailed Report, Duplicates Report, and Export to CSV.</p>	<p>Reports</p>		<ul style="list-style-type: none"> • Summary - Opens the Summary Report • List Report (HTML) - Creates and opens a List Report in HTML format • Detailed Report (HTML)- Opens the HTML version Detailed Report • Duplicates Report (HTML) - Opens the HTML version Duplicates Report • Export to CSV - Exports the entire list to a CSV file <p>Note: the root Summary window has additional reporting options including additional CSV List reports:</p>

	View	<ul style="list-style-type: none"> • Item Detail - Opens the details view for the individual result item. • Search Summary- Opens a text version of the search criteria • Keyword Details- Shows the Keyword that matched this item in separate view. • Exclude Ignored - View the Results without the ignored items • Include Ignored - Show the Ignored Items as part of your result list. • Application Log- Opens the application log file useful for viewing system wide events • End Columns - Shows the hidden columns at the end of the list view (All Results View only)
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Please note: The default text color of the items in the Results screen is black. Any other color indicates an action has been performed on the item. Use the Status and Action Location columns to view action details.

Shortcut Summary

Hotkey	Description
Ctrl-A	Select All Items
Ctrl-M	Mark currently selected item to black check.
F1	Opens this Help file at the current screen.
F2	Opens the Keyword Detail screen for currently selected item
F3	Opens the Item Details screen for currently selected item
F4	Sets the selected items to <i>'Ignore'</i>
F5	Refreshes the entire list
F6	Mark currently selected item to black check .
F7	Mark currently selected item to green circle.
F8	Mark currently selected item to blue square .
F9	Mark currently selected item to purple arrow.
F10	Mark currently selected item to red star.
F11	Remove marks from currently selected item
F12	Export entire list to CSV file

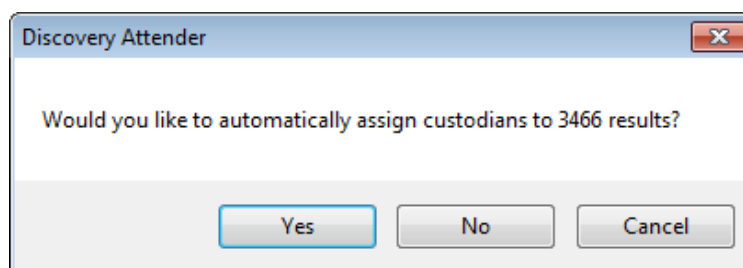
Automatically Assign Custodians

Discovery Attender has the ability to automatically label custodians with results. It does so by taking the aliases created using the [Manage Custodians](#) dialog box and comparing those aliases to various properties in the result set. As a result, those custodians must first exist and have alias properties before items can be auto-assigned.

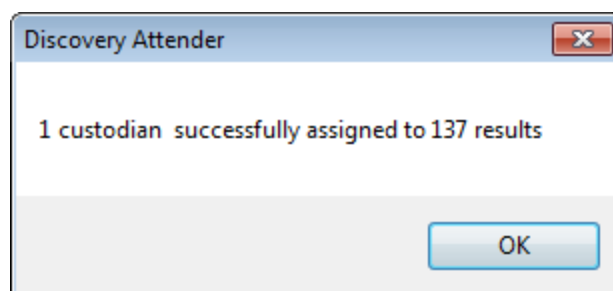
Users can assign custodians to the entire set of results using the *Organize | Auto Assign* menu option from the Result Summary screen.

Alternately, users can automatically assign custodian to just a selected set of results by selecting the results, then choosing *Organize | Auto Assign* from the context (Right-Click) menu on any result list view.

Once the options have been selected, users will be asked to verify they want to assign the custodians:



There is no progress bar for assigning custodians, so it may take a few minutes on larger searches before the summary screen is shown:



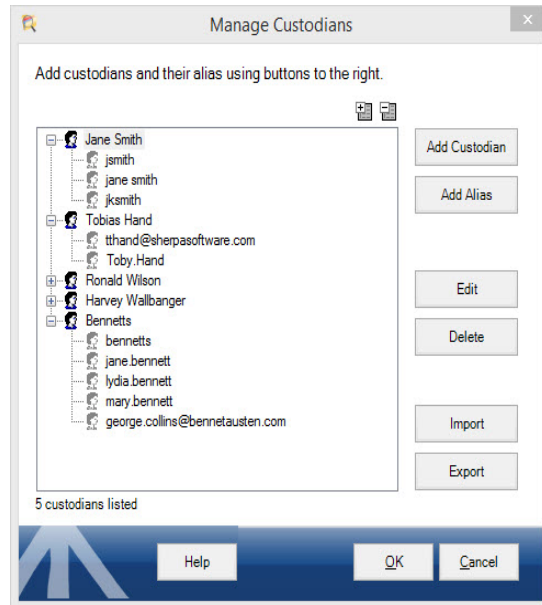
The aliases are used to automatically identify the custodians in the various property fields

Please note: There are other methods of assigning custodians to results. These can be explored in the [Manage Custodians Summary](#).

Managing Custodians

Custodian is a legal term used to define the owner or the person responsible for data sources or an individual results. With *Discovery Attender*, users have a number of methods for working with custodians including manually or automatically [assigning](#) one or more custodians to specific portions of the result set.

Custodians are project specific. They must be added to the project using the [Manage Custodians](#) dialog box accessible via the [Main Console Tools | Manage Custodians](#) option.



In addition to the listing of Custodians, custodian aliases must also be entered to utilize the [Automatic Assignment](#) features. These entry can be added using the Add/Edit buttons, or by importing a list from a custodian template.

Assigning Custodians

There are three methods for assigning custodians

Automatic Assignment (Result Set)

This option is available at the root node of the Result Summary screen under the *Organize | Auto Assign Custodian* option. It compares the alias values against the properties of the entire result set.

Automatic Assignment (Selected)

This option is available in a number of results screen under the *Organize | Auto Assign Custodian* option. It compares the alias values against the properties of the selected result entries. Only those entries that have been selected will be compared against the custodians.

Assign Selected

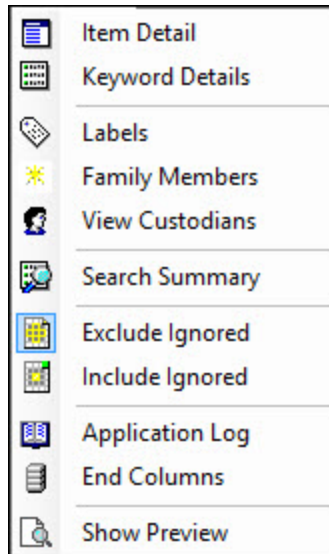
This option allows the users to manually assign custodians to selected results.

See Also

- [Manage Custodians](#)
- [Automatically Assign Custodians](#)

View Options

Discovery Attender stores many details about the files and messages it searches, however there isn't always enough room to list these properties in the standard views. To help display this information, most result views contain a View Menu which links to expanded details.



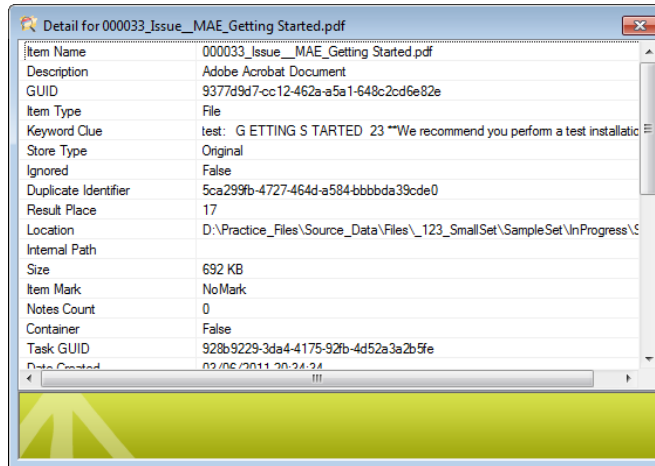
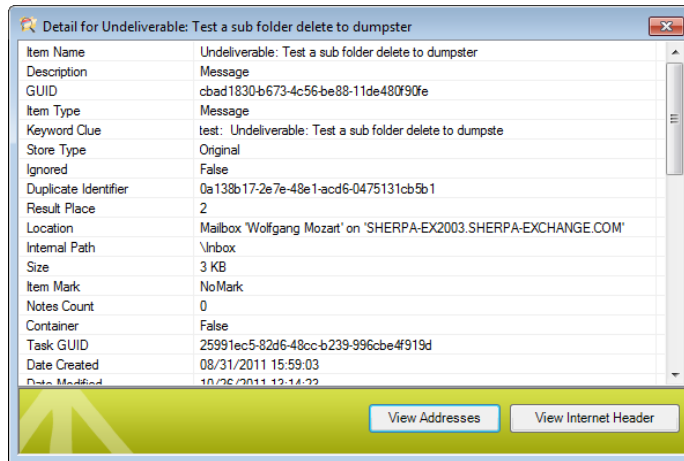
Please Note

- [Item Detail](#), [Keyword Detail](#), [Labels](#), [Family Members](#), and [View Custodians](#) are based on the individual result selected in a list view.
- [Search Summary](#) references the source search of the selected result set.
- [Exclude](#) and [Include Ignored](#) menu choices manage all views in this result set.
- [Application Log](#) houses data gathered on the application level.
- The End Column menu item is only found in the 'All Result' node and refers to that list view only.
- Toggling the Show Preview option will turn the Preview Pane on and off for the current view for the duration of the session.



Item Details

Also reached by the **F3** key, the item details show a list of properties for the selected result. This view will differ per result type, as will the options available.

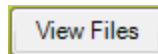


Item Detail: Message

Item Detail: File

For messages and attachments, click on the 'View Addresses' button to see a listing of the To, From, CC and BCC addresses. The 'View Internet Header' button will display the Internet headers for the selected result, if available. Keep in mind that not all messages have Internet headers.

Files that are containers (e.g. Zip files) will display a 'View Files' button that opens a screen listing the component files with details. A value of 'True' in the Hit column indicates the relevant container file matched the search keyword criteria.



Full Name	Hit	File Name	Path	Modified	Size	Comp...	MD5 Hash	Position	Keywords
DelegatesAndEvents\Simple...	False	SimpleDelegate1.cs	DelegatesAndEvents\Simple...	10/18/2003 3:3...	0 KB	0 KB	wTGucau11SecYc...	6	
DelegatesAndEvents\Simple...	False	SimpleDelegate1.exe	DelegatesAndEvents\Simple...	10/18/2003 3:3...	4 KB	0 KB	733N8dzVVJ6yTl...	7	
DelegatesAndEvents\Simple...	True	SimpleDelegate2.cs	DelegatesAndEvents\Simple...	10/18/2003 1:5...	2 KB	0 KB	wgvsmkVzp6cqFE...	8	test: ("Proc...
DelegatesAndEvents\Simple...	False	SimpleDelegate2.exe	DelegatesAndEvents\Simple...	10/18/2003 2:1...	4 KB	0 KB	RIAn+9y4v4MpO/...	9	
DelegatesAndEvents\Simple...	False	SimpleDelegate3.cs	DelegatesAndEvents\Simple...	10/18/2003 3:0...	2 KB	0 KB	Nm58NzaubDVqY...	10	
DelegatesAndEvents\Simple...	False	SimpleDelegate3.exe	DelegatesAndEvents\Simple...	10/18/2003 3:4...	4 KB	0 KB	eZ5WkD7uKgHm...	11	
DelegatesAndEvents\Simple...	False	SimpleDelegate4.cs	DelegatesAndEvents\Simple...	10/21/2003 9:0...	3 KB	0 KB	O+Q42KqYFUvJO...	12	
DelegatesAndEvents\Simple...	False	SimpleDelegate4.exe	DelegatesAndEvents\Simple...	10/21/2003 9:0...	4 KB	0 KB	j+k/AUDJJAgoDus6...	13	
DelegatesAndEvents\Simple...	False	SimpleEvent.cs	DelegatesAndEvents\Simple...	10/22/2003 1:5...	2 KB	0 KB	azwYJzGuO6aLq...	14	
DelegatesAndEvents\Simple...	False	SimpleEvent.exe	DelegatesAndEvents\Simple...	10/22/2003 2:1...	5 KB	0 KB	A4SpDZmFgww/...	15	
DelegatesAndEvents\Samp...	True	SimpleSample.cs	DelegatesAndEvents\Samp...	10/18/2003 1:0...	0 KB	0 KB	X/G0/c1TPvgan1...	1	test: eLine("...
DelegatesAndEvents\Samp...	False	SimpleSample.exe	DelegatesAndEvents\Samp...	10/18/2003 12:...	3 KB	0 KB	1q7fFxn704V4b...	2	
DelegatesAndEvents\Seco...	True	SecondChange.cs	DelegatesAndEvents\Seco...	10/22/2003 6:0...	5 KB	0 KB	ugn2YsqvLGXuO...	3	test: :ToStr...
DelegatesAndEvents\Seco...	False	SecondChange.exe	DelegatesAndEvents\Seco...	10/22/2003 5:5...	5 KB	0 KB	tZEdeFhsUAbqm...	4	
DelegatesAndEvents\Simple...	False	process.log	DelegatesAndEvents\Simple...	10/22/2003 11:...	0 KB	0 KB	nWPTOBVwVJ8A...	5	

SharePoint objects will have a SharePoint Properties button that opens the XML listing of properties .

Keyword Details

If the keywords were included as search criteria, this option allows you to see the keywords pertaining to the selected result.

Keyword	Type	Count	First Snippet
gas AND LIKE("electr")	Branch	1	
jane	Branch	1	
gas	Leaf	72	PIRA ENERGY GROUP December 13, 2000 N
jane	Leaf	2	reg Shuttlesworth, Tom Howard, Richard Redas
<(coal OR gas OR oil) AND (field OR plant ...	Original	1	
<austen OR jane OR bingley OR lucas OR ...	Original	1	

6 Keywords listed

If the 'Complete' search was selected in the search wizard Keyword Options page , the detail shown on this screen includes each of the keywords found from the original keyword criteria list. If the 'Simple' option was chosen, this view will only show the details for the first keyword hit.

	Description
Keyword	The keyword hit text.
Type	The type of keyword (Leaf, Branch, Original)
Count	Number of times the keyword hit within the document.
First Snippet	A snapshot of text from the first location where the keyword was found.

Location	Code for where the snippet was found. In the example above, all the keywords were found in the body of the attachment.
Offset	Helps identify where the keyword was found within the section of the document.
Place	Order in which the keyword was found (note: 0 based).
Original Expression	If this keyword was part of a search expression that was delineated with < and > , then the original expression is listed here.

Labels

Selecting this option will open a view that lists all the labels for the selected result.

Family Members

This option will show any mail items related to the selected item. For example, all attachments from the same source message are considered part of the same family.

View Custodian

Shows the list of custodians assigned to this result.

Search Summary

This option opens the simple Search Summary report which can be copied to any text based program (e.g. Notepad) using cut and paste functionality. This report contains information about the overall search including processing information, criteria, and locations.

An alternate report for summary data is the [HTML Summary](#) report which also includes much of the same detail but adds such things as result statistics in a formatted HTML view.

Exclude Ignored

This view option will clear all ignored items from the selected view.

Include Ignored

By default, no result list will show items that have been ignored. This option allows you to view all the results including those that have previously been ignored. Those ignored items will appear in a light gray text.

Application Log

Opens the current day's log file which holds data pertinent to application processes. If you encounter an unusual situation and suspect there was an error, the application log can be helpful for debugging.

End Columns

For visibility purposes, the [All Results](#) view hides the end columns. This option allows you to view those columns for debugging or further details.

	Description
Action Location	The most recent export location for the given result.

Marked As	The text version of the item Mark. These labels can be associated in the Settings view.
Location Count	The iteration count within the location or task, not the result set.
Result GUID	Discovery Attender's unique identifier for the result item within the given search.

Note

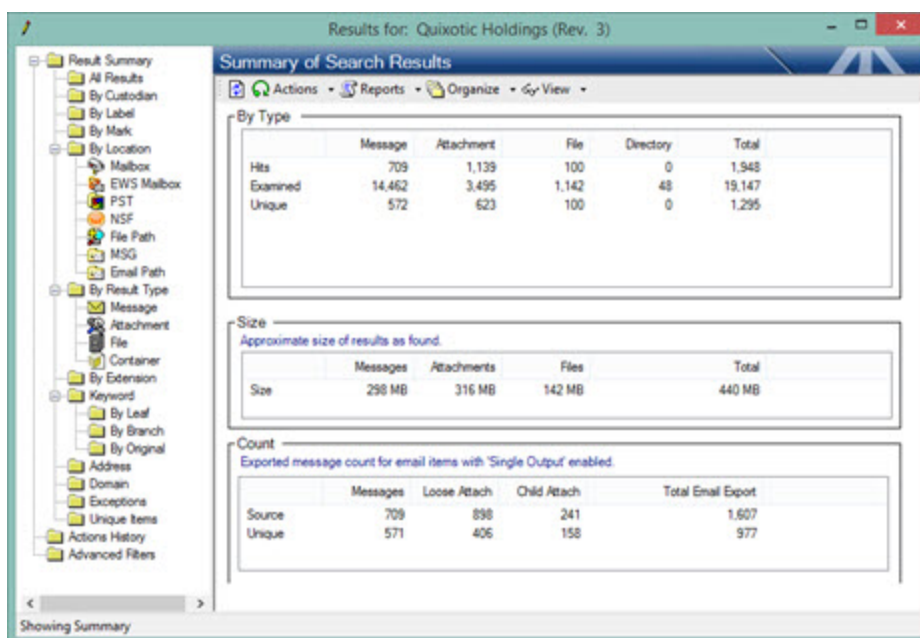
Regardless of whether they are visible or not, the end columns will always appear in CSV reports.

Show Preview

Displays the preview pane for the current view for the duration of this session

Results View: Summary of Search Results

This view provides an overall summary of the results. It is a convenient dashboard for executing actions and creating reports for the entire result set.



- Each of the list views can be exported to CSV file using the context (right click) menu.

By Type

Aggregate summary of the results by the result type (Messages, Attachment, File, Directory, Total)

Hits	Number of items which matched the criteria for the given result type
Examined	Total number of items examined as part of the search for each given type. This number includes the number of hits, plus items which did not hit.
Unique	This line only shows if the results have been deduplicated. It shows what the number of items when duplicates are removed.

Size

Combined size (as searched) for each of the result types. This listing gives an **approximation** of the final size

of a results set. However, a number of factors (Single Output Option, export storage format, source file format) will determine the final size of the exported result set.

Count

Count of Exported items if [Single Output Message](#) is enabled, but not counting duplicates or ignored items.

Messages	Number of source messages exported (usually equals the number of message hits)
Loose Attach	Number of attachments whose source messages did not match the criteria. Only the attachment is represented in the result set.
Child Attach	Number attachments whose source messages also matched the criteria. The source message for this attachment will be exported. With the Single Source Output, the child attachments are not exported since that would create duplicates in the exported files.
Total Email Export	Total number of email in the exported source if Single Output Message is enabled. IT is the sum of the messages plus the loose attachments.

Toolbar

The Summary of Search Results is one of a few result screens that does not share the common toolbar and menu, although it is very similar. There are several differences:

- Any export [actions](#) selected from this screen are done to the **entire** result set, not specifically selected items.
- The [Compare Searches](#) functionality is only available from the action menu on this screen
- The [List Report \(CSV\)](#) is only available from the report menu on this screen.
- The *View | By Store option* opens the *BY STORE* view. In previous versions, this view was located on the main Result Summary page.

	Mailbox	Public Folder	PST	EWS Mailbox	EWS Archive	EWS Public...	NSF	Online Archi...	File Path	Email Path	MSG
Success	13	0	10	0	0	0	0	0	17	0	0
Failed	0	0	0	0	0	0	0	0	0	0	0
Not Searched	0	0	0	0	0	0	0	0	0	0	0
Total	13	0	10	0	0	0	0	0	17	0	0

By Store

Aggregate summary of the success by the store type.

Success	Total number of location stores that were searched and completed successfully or successfully with errors.
Failed	Number of locations stores that started to search, but failed to complete.
Not Searched	Number of locations that were never started, and therefore never searched.
Total	Total number of locations by store.

Please note: Exporting unique items (i.e. items that have been deduplicated) can only be done from the [Unique Items](#) view.

Result View: List of All Results

This view lists the details common to any of the results. All actions, organization and reports can be generated from this view. See the [Menu](#) page for more detail on initiating actions.

Name	Item Type	Location	Size	Keywords	Created	Modified	Status	Notes
gnda.xls from messag...	Microsoft Excel ...	Mailbox 'Roy Landy' on E...	15 KB	blue: July/Aug/Sep \$44...	6/26/2013 9:39:...	6/26/2013 9:39:...	0	
KS_OK_curves.xls fr...	Microsoft Excel ...	Mailbox 'Roy Landy' on E...	33 KB	blue: Sheet1 * Blue Num...	6/26/2013 9:39:...	6/26/2013 9:39:...	0	
Excel Pivot Tables - ...	Message	Mailbox 'Roy Landy' on E...	23 KB	single: Audio Recording ...	9/4/2013 10:05:...	9/4/2013 10:05:...	0	
St Patricks	Message	Mailbox 'Roy Landy' on E...	4 KB	green: Any plans for the gr...	6/26/2013 9:39:...	6/26/2013 9:39:...	0	
Fishing trip 81500.do...	Microsoft Word ...	Mailbox 'Roy Landy' on E...	56 KB	blue: 6:00 am. We will be ...	6/26/2013 9:39:...	6/26/2013 9:39:...	0	
FW: Fishingtrip Nat ...	Message	Mailbox 'Roy Landy' on E...	63 KB	gas: FW: Fishingtrip Nat g...	6/26/2013 9:39:...	6/26/2013 9:39:...	0	
NU joke	Message	Mailbox 'Roy Landy' on E...	9 KB	red: utting down the side o...	6/26/2013 9:39:...	6/26/2013 9:39:...	0	
WEFA2000_Energy ...	Microsoft Word ...	Mailbox 'Roy Landy' on E...	114 KB	coal: ring, international po...	6/26/2013 9:39:...	6/26/2013 9:39:...	0	
PIRAs Gas Flash W...	Message	Mailbox 'Roy Landy' on E...	105 KB	gas: PIRAs Gas Flash We...	6/26/2013 9:37:...	8/23/2013 9:10:...	0	
RE: Modification (R...	Message	Mailbox 'Roy Landy' on E...	17 KB	collins: @ect.enron.com; d...	6/26/2013 9:39:...	6/26/2013 9:39:...	0	
East001213.doc fro...	Microsoft Word ...	Mailbox 'Roy Landy' on E...	101 KB	gas: 41.2%Wisconsin P...	6/26/2013 9:39:...	6/26/2013 9:39:...	0	
List Report.htm from ...	HTML Document	Mailbox 'Roy Landy' on E...	19 KB	shepa: PM Attender Utilit...	5/8/2013 4:06:0...	5/8/2013 4:06:0...	0	
aga121300.pdf from ...	Adobe Acrobat ...	Mailbox 'Roy Landy' on E...	91 KB	jane: reg Shuttlesworth, T...	6/26/2013 9:37:...	6/26/2013 9:37:...	0	
East001213.doc fro...	Microsoft Word ...	Mailbox 'Roy Landy' on E...	101 KB	gas: 41.2%Wisconsin P...	6/26/2013 9:37:...	6/26/2013 9:37:...	0	
NU joke	Message	Mailbox 'Roy Landy' on E...	10 KB	red: ting down the side of t...	6/26/2013 9:37:...	8/22/2013 12:3...	0	
FW: Fishingtrip Nat ...	Message	Mailbox 'Roy Landy' on E...	7 KB	gas: FW: Fishingtrip Nat g...	6/26/2013 9:37:...	8/22/2013 12:3...	0	
St Patricks	Message	Mailbox 'Roy Landy' on E...	5 KB	green: 2000 12:55:00 PM]	6/26/2013 9:37:...	8/22/2013 12:3...	0	
PIRAs Gas Flash W...	Message	Mailbox 'Roy Landy' on E...	105 KB	gas: PIRAs Gas Flash We...	6/26/2013 9:39:...	6/26/2013 9:39:...	0	
aga121300.pdf from ...	Adobe Acrobat ...	Mailbox 'Roy Landy' on E...	91 KB	jane: reg Shuttlesworth, T...	6/26/2013 9:39:...	6/26/2013 9:39:...	0	
This Week: Disaster...	Message	Mailbox 'Walter Sobchak' o...	7 KB	green: html?track=NL-180...	10/14/2011 10:...	10/14/2011 10:...	0	
Todays News: Note...	Message	Mailbox 'Walter Sobchak' o...	5 KB	blue: says Microsoft > M...	10/14/2011 10:...	10/14/2011 10:...	0	
Ask: The Experts: Int...	Message	Mailbox 'Walter Sobchak' o...	5 KB	blue: ALSO ON SEARCH3...	10/14/2011 10:...	10/14/2011 10:...	0	
Todays News: The t...	Message	Mailbox 'Walter Sobchak' o...	5 KB	blue: mputing, to talk abou...	10/14/2011 10:...	10/14/2011 10:...	0	
Todays News: Dass...	Message	Mailbox 'Walter Sobchak' o...	5 KB	blue: works with Notes >...	10/14/2011 10:...	10/14/2011 10:...	0	
Todays News: Humi...	Message	Mailbox 'Walter Sobchak' o...	5 KB	blue: ge Clips: Gartner pre...	10/14/2011 10:...	10/14/2011 10:...	0	

- Each entry in this list is a record of an individual result item that passed the search criteria.
- Discovery Attender result items can be one of four types: attachment, directory, message, or file.
- Attachment and Message items originate from one of four places: Mailboxes on an Exchange server, Public Folders on an Exchange server, PST files or Archive Attender archives.
- Files and Directory results are found on hard drives or networks.

Once you have performed an action on a result, the text of the color of that result will change. You may reset the text to the default black by items using the Actions menu and selecting Reset.

Columns

These columns are the standard detail columns and are used by most of the detail views

	Description
--	-------------

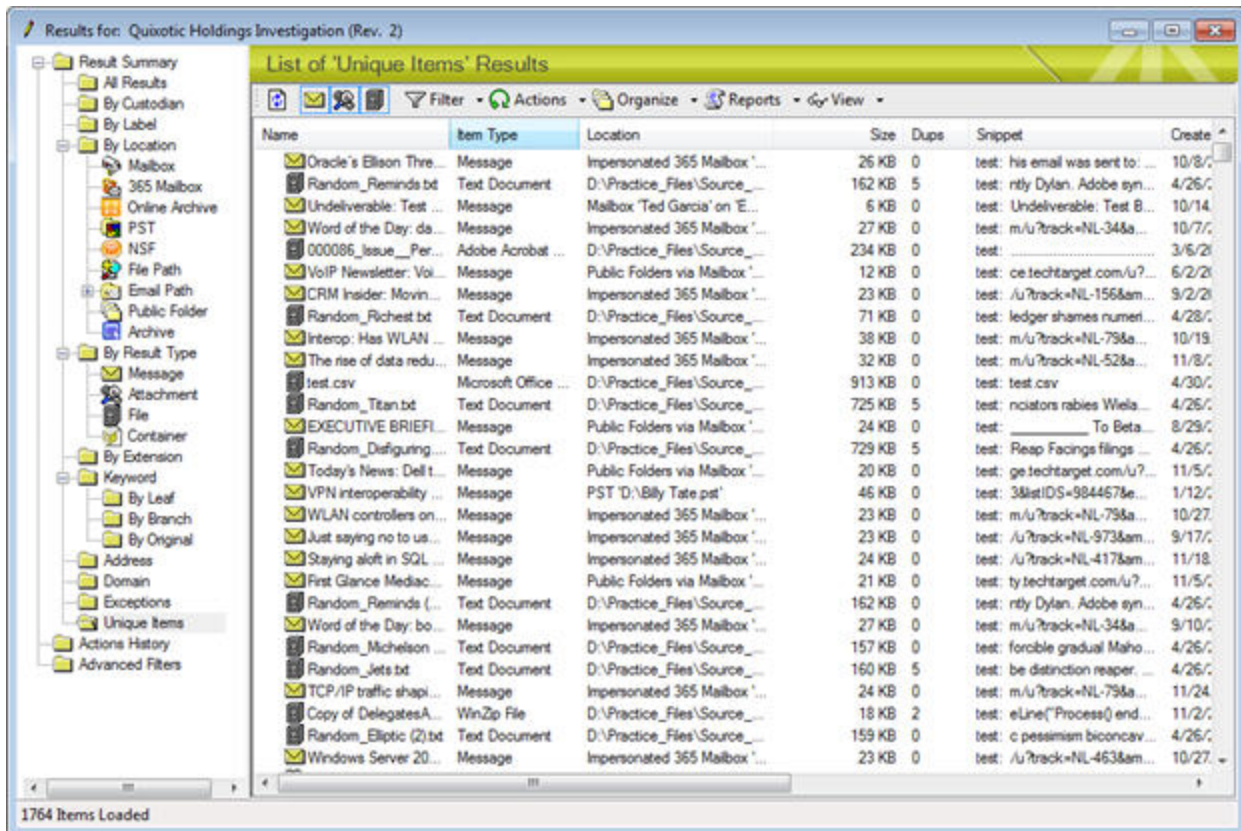
Name	Title of result item, the value is dependent on the type: Attachment Name of the file attachment with the subject of the originating email in parenthesis Message Subject line of email File Name of the file Directory Name of the directory. Directory hits are for informational purposes only, they cannot be copied or moved, but they can be opened.
Item Type	The result type for the item. In the case of files and attachments, the registered item type of the extension (if known). Otherwise, the type of result is listed. Note: Messages (.msg) are the generic name for any Outlook or Exchange item. Although mostly associated with email messages, they can also be contacts, calendar appointments, notes or journal entries.
Location	Description of where the item was found. Format is Store Type (PST, Mailbox, Public Folder, Path), Store Name (Internal Folder Structure), e.g. PST c:\my-folder\BeckyThatcher.pst (\Inbox\Accounting)
Size	Size of the original item.
Keywords	Snippet of the first keyword found and surrounding text. To better view the keywords found for this item, select <i>View Keyword Details</i> from the toolbar or menu. If the 'Complete' option was selected. All found keywords will be listed.
Created	If available, date the item was created.
Modified	If available, date the item was modified. Hint: For other dates or details about the file, select <i>View Item Details</i> from the toolbar or menu.
Status	Most recent action taken with this result item. A blank entry is normal. It means that no action has yet been taken against the item.
Notes	Count of how many annotations exist for this result item.
The following columns are hidden by default. Use the View End Columns to see these columns, if available	
Action Location	Location of exported item if it was copied or moved. Only the most recent action location is shown.
Marked As	The text equivalent of the user selected icon. This text can be modified in the Settings .
Location Count	The unique count of the item within a given location. The number is reset by location.
Result GUID	Unique identifier of this result in this search. This is a Discovery Attender specific field, and should not be used for file identification.

Please see the [menu page](#) to learn about the toolbar and context menu for this page.

Result View: Unique Items

Discovery Attender provides a user with the ability to [deduplicate](#) a result set for messages, attachments, and file duplicates. This view shows all unique results after deduplication has been run on the result set. Once the deduplication process has completed, this 'Unique Items' node will appear within the tree hierarchy in the Res-

ults Management window. Contained within this view is a listing of all unique result items that were found in the deduplication process. Read more about the process of deduplication [here](#).



- All the actions performed on this screen will be performed on unique items only, The duplicates will not be included.
- Once the result items have been deduplicated, this view will always appear as a choice in the tree view selector. You can change your deduplication settings by re-running the deduplication process.

The columns, toolbars and menus in this view are similar to most detail views, with a few exceptions.

- The 'Dups' column lists the number of duplicates an item has, not including itself.
- The 'View Duplicates' menu option which lists all the duplicates of the selected item. The master unique item is shown with purple text.

Name	Item Type	Location	Size	Keywords	Created	Modified	Status	Action Location	Marked
Oracle security laps...	Message	Mailbox 'Wolfga...	20 KB	test: ty.te...	6/3/2009 8...	6/3/2009 8...	Copie...	C:\temp_test\joi...	
Oracle security laps...	Message	PST D:\Billy Tat...	44 KB	test: ty.te...	1/12/2007 ...	9/13/2007 ...	Copie...	C:\temp_test\joi...	
Oracle security laps...	Message	File Path (And S...	54 KB	test: ty.te...	9/8/2010 5...	9/8/2010 5...	Copie...	C:\temp_test\joi...	
Oracle security laps...	Message	File Path (And S...	54 KB	test: ty.te...	9/8/2010 5...	9/8/2010 5...	Copie...	C:\temp_test\joi...	
Oracle security laps...	Message	File Path (And S...	54 KB	test: ty.te...	9/8/2010 5...	9/8/2010 5...	Copie...	C:\temp_test\joi...	
Oracle security laps...	Message	File Path (And S...	54 KB	test: ty.te...	9/8/2010 5...	9/8/2010 5...	Copie...	C:\temp_test\joi...	
Oracle security laps...	Message	Public Folders vi...	20 KB	test: ty.te...	3/27/2007 ...	6/4/2007 3...	Copie...	C:\temp_test\joi...	
Oracle security laps...	Message	Public Folders vi...	20 KB	test: ty.te...	3/27/2007 ...	6/4/2007 3...	Copie...	C:\temp_test\joi...	
Oracle security laps...	Message	Public Folders vi...	20 KB	test: ty.te...	3/27/2007 ...	6/4/2007 3...	Copie...	C:\temp_test\joi...	
Oracle security laps...	Message	Public Folders vi...	20 KB	test: ty.te...	3/27/2007 ...	6/4/2007 3...	Copie...	C:\temp_test\joi...	
Oracle security laps...	Message	Public Folders vi...	28 KB	test: ty.te...	6/12/2007 ...	6/12/2007 ...	Copie...	C:\temp_test\joi...	
Oracle security laps...	Message	Public Folders vi...	28 KB	test: ty.te...	11/30/2006...	11/30/2006...	Copie...	C:\temp_test\joi...	

Result View: Custodian Summary

Custodians are an organizational tool that help group items associated to a specific individual. The By Custodian summary and details are populated by assigning custodians to data stores in the [By Location](#) node.

Name	Alias List	A...	File Path	Mailbox	MSG	NSF	Online Archive	PST	Total
Jane Smith	jasmith jane s...	0	0	6	5	0	0	4	15
Ronald Wilson	rwilson ron...	0	0	51	0	0	0	0	51
Harvey Wallbanger	hwallbanger ...	0	0	170	322	0	0	299	791
Franz Liszt	liszt	0	0	0	5	0	0	21	26
Frederic Chopin	fchopin@sher...	0	0	0	9	0	0	19	28

Columns

	Description
Name	The custodian's name.
Alias	An optional alternative for referencing the custodian.
Primary Email	The custodian's primary email address.

Alternate Email	An optional alternative address, such as the custodian's home email.
Note	An additional optional field for entering comments or other data.
AA	The number of items found in Archive Attender archives assigned to the custodian.
File Path	The number of files assigned to the custodian.
Mailbox	The number of Exchange mailbox items assigned to the custodian (for example: messages, calendar items, etc.).
MSG	The number of MSG files assigned to the custodian.
NSF	The number of Lotus Notes messages assigned to the custodian.
Online Archive	The number of Exchange 2010 archive items assigned to the custodian.
PST	The number of PST files assigned to the custodian.
Public Folder	The number of Public Folder mailbox messages assigned to the custodian.
SharePoint	The number of SharePoint items assigned to the custodian.
Total	The total number of items assigned to the custodian.

Result View: Summary of Labels

[Labels](#) are an organizational tool that you can assign to one or more results to help group related items. Once labels have been applied to items within the result set, a user can access a summary of those labels by clicking on the 'By Label' node. This view shows the number of result items are contained within each label group.

Results for: Quixotic Holdings (Rev. 3)

Summary of Labels

	Number Results
Priv	27
Review	7
Urgent	43

Showing Labels Summary

- Automatic Labels created during a search will also appear in this Summary of Labels.
- A [detail node](#) for each label will be created under the main 'By Label' node. By selecting the detail node, you can see a listing of the results assigned to each label.

Result View: Summary of Location

The location summary screen provides an aggregate view of all tasks (or locations) that were included in the search. The table shows vital statistics for each location - see column descriptions below. Double-Clicking on a list entry will open the task log file showing details of the search for the selected location.

Results for: Quixotic Holdings (Rev. 3)

Summary of Location

Type	Location	Result	Errors	Skips	Warnings	Started	Elapsed	Tot...	Ms...	Ms...	Att ...	Att Ex
PST	JudyBloom.pst (C:\R...	Successful	0	0	0	3/14/2017 ...	8 Secs	1	1	1	0	0
FilePath	\\lowrider.sherpa-ex...	Successful	0	0	0	3/14/2017 ...	11 Secs	4	0	0	0	0
PST	Test0365Move.pst (...)	Successful	0	0	0	3/14/2017 ...	6 Secs	0	0	1	0	1
FilePath	\\lowrider.sherpa-ex...	Successful	0	0	0	3/14/2017 ...	4 Secs	0	0	0	0	0
FilePath	\\lowrider.sherpa-ex...	Successful	0	0	0	3/14/2017 ...	2 Secs	0	0	0	0	0
MSG	\\lowrider.sherpa-ex...	Successful with ...	0	8	0	3/14/2017 ...	39 Secs	24	23	194	1	61
MSG	\\lowrider.sherpa-ex...	Successful	0	0	0	3/14/2017 ...	1 Sec	0	0	0	0	0
NSF	dsattend.nsf (C:\Use...	Successful with ...	12	0	0	3/14/2017 ...	8 Secs	0	0	12	0	0
FilePath	\\lowrider.sherpa-ex...	Successful	0	0	0	3/14/2017 ...	4 Secs	0	0	0	0	0
Mailbox	Walter Sobchak (EX...	Successful	0	0	0	3/14/2017 ...	40 Mins 2...	683	103	4,270	580	1,083
MSG	\\lowrider.sherpa-ex...	Successful with ...	4	0	0	3/14/2017 ...	7 Mins 43 ...	277	135	155	142	148
MSG	\\lowrider.sherpa-ex...	Successful	0	0	0	3/14/2017 ...	10 Secs	12	12	42	0	0
FilePath	\\lowrider.sherpa-ex...	Successful	0	0	0	3/14/2017 ...	18 Secs	0	0	0	0	0
Mailbox	Willy Mayfair (EX2010)	Successful	0	0	0	3/14/2017 ...	21 Secs	0	0	15	0	6
PST	Wolfgang Mozart.pst...	Successful	0	0	0	3/14/2017 ...	6 Secs	0	0	0	0	0
MSG	\\lowrider.sherpa-ex...	Successful	0	0	0	3/14/2017 ...	1 Sec	0	0	5	0	0
MSG	\\lowrider.sherpa-ex...	Successful	0	0	0	3/14/2017 ...	2 Secs	0	0	0	0	0
Mailbox	nat_ex2013 (EX2013)	Successful	0	0	0	3/14/2017 ...	48 Secs	0	0	5	0	1
FilePath	\\lowrider.sherpa-ex...	Successful	0	0	0	3/14/2017 ...	4 Secs	0	0	0	0	0
NSF	Abby Miller2.nsf (C:\...	Successful	0	0	0	3/14/2017 ...	83 Secs	1	0	24	1	1
FilePath	\\lowrider.sherpa-ex...	Successful	0	0	0	3/14/2017 ...	1 Sec	0	0	0	0	0
PST	2007.pst (C:\Reports\)	Successful	0	0	0	3/14/2017 ...	24 Secs	88	87	566	1	9
FilePath	\\lowrider.sherpa-ex...	Successful	0	0	0	3/14/2017 ...	35 Secs	25	0	0	0	0

Showing Location Summary

Columns

	Description
Type	Data store type of the location: Mailbox, Public Folder, PST, Archive or File Path
Location	The name or path of this task.
Result	The final result of the search, e.g. Successful, Successful with Errors, Canceled, etc.
Errors	Number of errors incurred for this task during the search.
Skips	Number of items skipped for this task during the search.
Warnings	Number of warnings incurred for this task during the search
Started	Time the processing began for the task,
Elapsed	Total number of items examined (messages, attachments, files and directories) for this task.
Total Hits	Total number of matches for this task
Msg Hits	Total number of message matches for this location.
Msg Ex	Total Number of messages examined during the search for this task. Note, this number includes hits and non-hits.
Att Hits	Total number of attachment matches for this location
Att Ex	Total number of attachments examined (hits and non-hits)

File Hits	Total number of file matches.
File Ex	Total number of files examined during this task process.
Dir Hits	Total number of directory hits
Dir Ex	Total number of directories examined
Total Ex	Total number of items (Messages, Attachments, Files and Directories) that were examined during this search (Hits and Non-hits)
Percent	Percent of items that matched for this search out of the total number examined

Result View: By Result Type: Summary

This view is a place holder for the type detail sub-nodes. Please select the [Message](#), [Attachment](#), [File](#) , or [Container Items](#) sub-nodes to see the result items with specific detail.

Result View: By Extension

This view shows a grouping of all the items by the file or attachment extension.

Results for: Quixotic Holdings (Rev. 3)

Extension	Description	Total	Attachments	Files
.01	Embedded Object	1	1	0
.01	Unknown	4	4	0
.1	Unknown	4	4	0
.dat	dat_auto_file	11	11	0
.doc	Microsoft Word 97 - 2003 Docum...	122	104	18
.docx	Microsoft Word Document	3	1	2
.eml	Email Message	1	1	0
.htm	HTML Document	642	642	0
.log	Text Document	5	0	5
.mdb	Microsoft Access Database	2	2	0
.msg	Outlook Item	3	3	0
.pdf	Adobe Acrobat Document	76	48	28
.ppt	Microsoft PowerPoint 97-2003 Pr...	20	17	3
.pptx	Microsoft PowerPoint Presentation	4	0	4
.pst	Outlook Data File	1	0	1
.txt	Text Document	46	24	22
.wpd	Unknown	4	4	0
.xls	Microsoft Excel 97-2003 Worksh...	84	77	7
.xlsx	Microsoft Excel Worksheet	7	1	6
.xml	XML Document	9	8	1
.zip	Compressed (zipped) Folder	28	25	3
Message	Message	709	0	0

Extensions listed: 22

Please note:

- Double-Clicking on an entry will create a new node under this summary node. It opens a listing of all the items that match the selected extension.
- The Message extension is just a grouping for the message type results. It is not an actual extension, nor are these actual file or attachment items.

Result View: Keyword Summary

This screen displays the statistics for keywords found during the search. This screen will only display if keyword details have been saved as part of the search. See [Settings](#) for more information.

Results for: Quixotic Holdings (Rev. 3)

Keyword Summary

By Leaf

Keyword	Message	Attachment	Files	Directory	Total	Percent	Single ...	Percent
attend*	40	131	0	0	171	8.78%	28	15%
austen	0	0	2	0	2	0.10%	0	0%
blue	86	104	28	0	218	11.19%	0	0%
book	0	0	3	0	3	0.15%	0	0%
coal	3	50	17	0	70	3.59%	0	0%
colfax	19	14	10	0	43	2.21%	0	0%

By Branch

Expression	Message	Attachment	Files	Directory	Total	Percent	Single ...	Percent
(coal OR gas OR oil) AND f...	0	5	1	0	6	0.31%	0	0%
(coal OR gas OR oil) AND f...	0	11	5	0	16	0.82%	0	0%
(coal OR gas OR oil) AND (...)	0	3	1	0	4	0.21%	0	0%
(coal OR gas OR oil) AND L...	1	15	0	0	16	0.82%	0	0%
(coal OR gas OR oil) AND p...	0	1	0	0	1	0.05%	0	0%
(coal OR gas OR oil) AND #old O...	0	7	1	0	8	0.41%	0	0%

By Original

Expression	Message	Attachment	Files	Directory	Total	Percent	Single ...	Percent
<(coal OR gas OR oil) AND...	38	235	33	0	306	15.71%	0	0%
<(humor OR humour) AND (...)	19	18	14	0	51	2.62%	0	0%
<austen OR jane OR bingle...	58	104	47	0	209	10.73%	0	0%
<blue OR green OR red O...	360	189	53	0	602	30.90%	0	0%
<shepa AND software AN...	240	849	29	0	1,118	57.39%	0	0%

Showing Keyword Summary

There are three tables shown in the keyword summary. The top table 'By Leaf' will always be shown anytime keywords were used as criteria. The 'By Leaf' table lists each individual keyword or phrase that was found as part of the search, regardless if it was a Word List or Search Expression. If the 'Complete' option was used for the search, each keyword found per item will be included in this list. If the 'Simple' option was used, only the first keyword found in each result is returned.

The second 'By Branch' and third 'By Original' table will contain values if

- a) a Search Expression was used and
- b) delineators (i.e. '<' and '>') were used to identify a particular portion of that Search Expression.

Please note: A keyword or branch expression is counted only once per result item per list. This means that even if a keyword has ten instances inside a given document, that keyword is counted just once for that specific result.

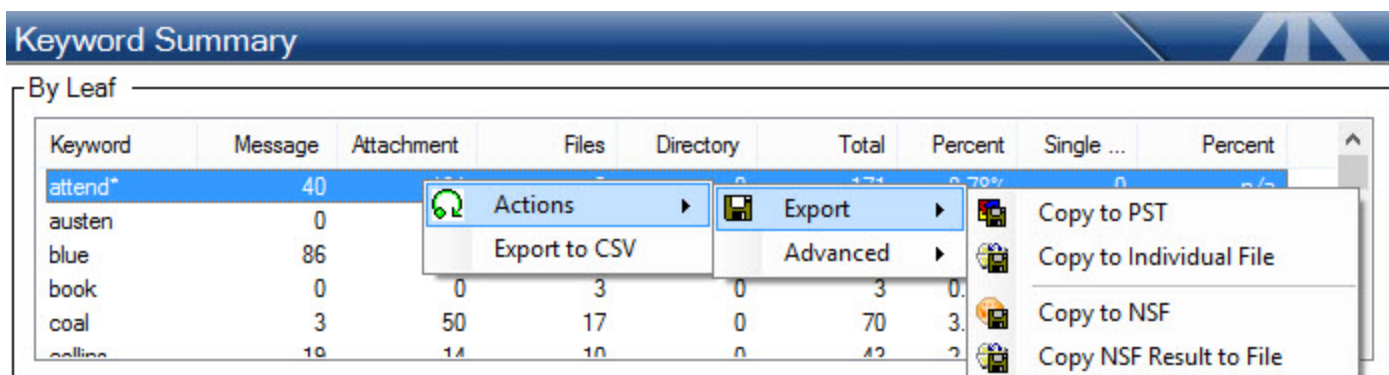
	Description
Keyword	The actual word, phrase, or matched expression that was found in the result.
Message	Number of Message results which matched this keyword, phrase or branch expression
Attachments	Number of Attachment results which matched this keyword, phrase or branch expression
Files	Number of File results which matched this keyword, phrase or branch expression
Directory	Number of Directory results which matched this keyword, phrase or branch expression
Total	Total number of results which matched this keyword, phrase or branch expression
Percent	Percentage of results which matched the keyword, phrase or branch expression
Single	The total number of times that this keyword is the only keyword to match in a result.

	Note: searches run in older versions of Discovery Attender will not have this value recorded as 0.
Percent	The percentage of the total number of results for this keyword where this keyword is the only keyword to match the criteria. Note: searches run in older versions of Discovery Attender will not have this value recorded as 'n/a'

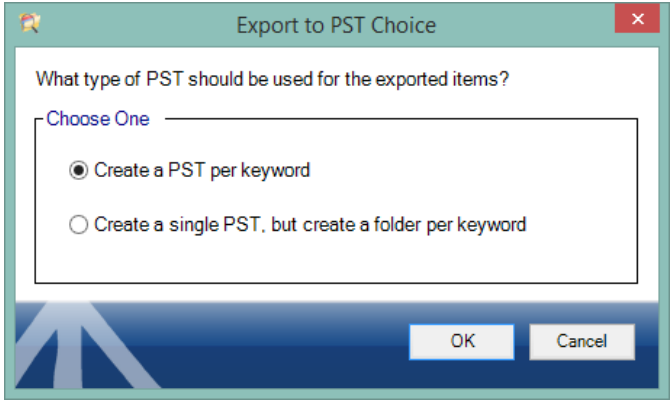
The summary tables can be exported by choosing 'Export to CSV' from the context menu.

There are three sub-nodes under the main **Keyword** node, 'By Leaf' 'By Branch' and 'By Original'. Clicking on either will show further sub-nodes, one for each of the keywords, branch, or original expressions that were contained in results for this search. Clicking on each sub-node will show the [detail](#), a result list for the selected keyword or branch expression.

Menu Options



	Description
Actions	Note: This option is only available in the 'By Leaf' node.
Export	These options will export the results by keyword. If there is more than one keyword per result, duplicates will occur in the exported result set.
Copy to PST/NSF	This option will copy results to PST by keyword based on user options.

	
Copy to Individual File	This option creates a folder per keyword shown in the leaf hits.
<i>Advanced</i>	
Move to PST/NSF	This option will move results to PST by keyword based on user options. Note: If an item matches multiple keywords, only the first keyword will be created as the item cannot be moved more than once.
Move to Individual File	This option will move results to a file folder by keyword based on user options. Note: If an item matches multiple keywords, only the first keyword will be created as the item cannot be moved more than once.
Export to CSV	Exports the selected table to a CSV file.

Result View: Address Summary

This screen displays the summary for address details. Each address entry for every message and attachment result will be listed in this view.

Results for: Quixotic Holdings (Rev. 3)

Address Summary

Display Name	Sender	To	CC	BCC	OBO	n/a	Total	Percent	Address	Type	Domain
Morse Ingrid	0	1	0	0	0	0	1	0.05%	ingrid.morse@enron.com	SMTP	enron.com
Rudy	0	1	0	0	0	0	1	0.05%	/O=ENRON/OU=NA/CN=RECIPIEN...	SMTP	ENRON
Enron Wholesale Ser...	0	1	0	0	0	0	1	0.05%	IMCEANOTES-Enron+20Wholesale+...	SMTP	ENRON.com
Dan Lyons	1	0	0	0	0	0	1	0.05%	Dan Lyons	SMTP	[Unknown]
tmoore@lgn.com'	0	4	0	0	0	0	4	0.21%	tmoore@lgn.com	SMTP	lgn.com
Tim Belden	1	0	0	0	0	0	1	0.05%	Tim Belden	SMTP	[Unknown]
kpeterson@epelectri...	0	7	0	0	0	0	7	0.36%	kpeterson@epelectric.com'	SMTP	epelectric.com
InformationWeek	1	0	0	0	0	0	1	0.05%	InformationWeek@e.techwebresourc...	SMTP	e.techwebresources.com
Laurie King	0	0	0	0	1	0	0	0.00%	lking@DOAR.com	SMTP	DOAR.com
Allen Kelly	0	4	0	0	0	0	4	0.21%	Kelly.Allen@ENRON.com	SMTP	ENRON.com
'Mmslane@aol.com...	0	1	0	0	0	0	1	0.05%	Mmslane@aol.com@ENRON	SMTP	[Unknown]
Rahil Jafry	0	0	1	0	0	0	1	0.05%	Rahil.Jafry@ENRON@enronXgate	SMTP	[Unknown]
'William S Bradford'	0	0	2	0	0	0	2	0.10%	William S Bradford	SMTP	[Unknown]
'Bruce Lundstrom'	0	1	0	0	0	0	1	0.05%	Bruce Lundstrom	SMTP	[Unknown]
kpeterso	0	2	0	0	0	0	2	0.10%	kpeterso@epelectric.com	SMTP	epelectric.com
'Twanda Sweet'	0	6	0	0	0	0	6	0.31%	Twanda Sweet	SMTP	[Unknown]
Tammy R Shepperd	1	0	0	0	0	0	1	0.05%	Tammy R Shepperd@ENRON@enron...	SMTP	[Unknown]
Bob Sweat	0	0	0	0	1	0	0	0.00%	bsweat@opendoorsolutions.com	SMTP	opendoorsolutions.com
pgurfein@akingump...	0	7	0	0	0	0	7	0.36%	pgurfein@akingump.com	SMTP	akingump.com
Susan A. Bishop	1	0	0	0	0	0	1	0.05%	Sbishop@Gibbs-Bruns.com	SMTP	Gibbs-Bruns.com
Hunter S Shively	0	0	9	0	0	0	9	0.46%	Hunter S Shively	SMTP	[Unknown]
Anthony Cury	1	0	0	0	0	0	1	0.05%	info@mail.dnnews.com	SMTP	mail.dnnews.com
test-user2	0	2	0	0	0	0	2	0.10%	test-user2@shepa-exchange.com	SMTP	shepa-exchange.com
'TechWeb Today Se...	5	0	0	0	0	0	5	0.26%	'TechWeb Today Security & Privacy'...	NOTES	[Unknown]
Maureen McVicker	3	0	0	0	0	0	3	0.15%	Maureen McVicker	SMTP	[Unknown]
Tom Hand	0	12	0	0	0	0	12	0.62%	TomHand@dummydomain.com	SMTP	dummydomain.com

1 items selected of 752 addresses listed

This summary screen will be populated only if details were saved as part of the search. See the address details option in the Settings for more information.

The summary table can be exported by choosing 'Export to CSV' from the context menu.

Columns

	Description
Display Name	The name used for display purposes for the address
Sender	Number of times this address appeared as the sender
To	Number of times this address appeared as a To recipient
CC	Number of times this address appeared as a CC (Carbon Copy) recipient
BCC	Number of times this address appeared as a BCC (Blind Carbon Copy) recipient
OBO	Number of times this address appeared as an On Behalf Of sender
n/a	Number of times this address appeared as a non-classified address
Total	Total number of results in which this address appears
Percent	Percentage of total hits that contain this address
Address	The actual transport (aka routing) address for this address listing
Type	The result type for the item

Domain	Lists the Domain for this address
SMTP	Lists the common (aka SMTP) address for this listing. This option may not be available for all address listings.

Note: To view the all the results for a given address, double click on the address listing. A new node will appear under the [Address Detail sub-node](#) with the result items for the selected address.

Result View: By Domain

This screen displays the summary for Domain details. Each Domain entry for every address associated with a message and attachment result will be listed in this view.

Domain	Total Results	Unique Addresses	Total Listings	(Sender)	(To)	(CC)	(BCC)	(OBO)
[Unknown]	1,001	253	1,504	984	324	195	1	0
FIRST ORGANIZATI...	344	55	881	335	507	30	8	1
sherpaexchange.com	226	25	337	50	270	17	0	0
dummydomain.com	19	28	294	14	278	2	0	0
enron.com	0	73	193	38	121	33	0	1
yahogroups.com	91	3	182	91	91	0	0	0
paper.com	156	1	156	156	0	0	0	0
exchangelab.local	126	3	126	0	126	0	0	0
sithe.com	12	7	54	0	48	6	0	0
brobeck.com	31	5	39	16	10	13	0	0
epelectric.com	31	8	33	0	33	0	0	0
bracepatt.com	18	8	26	14	7	5	0	0
Gibbs-Bruns.com	0	0	25	1	23	1	0	0
ENRON	13	18	22	0	15	7	0	0
yahoo.com	21	14	21	0	2	0	0	19
MICROSOFTONLINE	20	1	20	0	20	0	0	0
rcn.com	19	2	19	0	16	0	0	3
sherpa-exchange.com	16	2	16	0	16	0	0	0
apx.com	7	2	14	0	14	0	0	0
ect.enron.com	13	2	13	0	13	0	0	0
gvtc.com	13	1	13	0	13	0	0	0

Please note:

- Double-Clicking on an entry will create a new node under this summary node. It opens a listing of all the items that match the selected domain.

Result View: Exceptions

This form presents a list of exceptions encountered during a search. This form mirrors the functionality of the [Combined Exception Log](#).

Description	Type	Level	Detail	Item Type	Item Name	File Type	C
Unable to convert attachme...	Skip	Document	This file is encry...	Attachment	Findit.xls	.xls	1
Unable to convert attachme...	Skip	Document	This file is encry...	Attachment	Findit.xls	.xls	1
Unable to convert attachme...	Skip	Document	This file is encry...	Attachment	Report Attenderdocx	1
Unable to convert attachme...	Skip	Document	This file is encry...	Attachment	Mockup_flowch...	.ppbx	1
Unable to convert attachme...	Skip	Document	This file is encry...	Attachment	Protected.doc	.doc	1
Unable to convert attachme...	Skip	Document	This file is encry...	Attachment	Protected.doc	.doc	1
Unable to convert attachme...	Skip	Document	This file is encry...	Attachment	Protected.doc	.doc	1
Unable to convert attachme...	Skip	Document	This file is encry...	Attachment	Findit.xls	.xls	1
Unable to convert attachme...	Skip	Document	This file is encry...	Attachment	Protected.doc	.doc	1
Unable to convert attachme...	Skip	Document	This file is encry...	Attachment	Findit.xls	.xls	1
Unable to convert attachme...	Skip	Document	pdfFileException...	Attachment	pw_is_chazzwa...	.pdf	6
Unable to convert attachme...	Skip	Document	pdfFileException...	Attachment	WhatsNew.pdf	.pdf	1
Unable to convert attachme...	Skip	Document	pdfFileException...	Attachment	pw_is_chazzwa...	.pdf	6
Unable to convert attachme...	Skip	Document	pdfFileException...	Attachment	pw_is_chazzwa...	.pdf	6
Unable to convert attachme...	Skip	Document	pdfFileException...	Attachment	pw_is_chazzwa...	.pdf	6
Unable to convert attachme...	Skip	Document	pdfFileException...	Attachment	pw_is_chazzwa...	.pdf	6
Unable to convert attachme...	Skip	Document	pdfFileException...	Attachment	WhatsNew.pdf	.pdf	1
Unable to convert attachme...	Skip	Document	pdfFileException...	Attachment	pw_is_chazzwa...	.pdf	6

This list of exceptions can be exported to a CSV file to provide a detailed report of the exceptions encountered during a search. Alternately, where possible, the items which threw the exceptions can be exported to native format so they can be processed manually, or with other tools.

Please note: Exports of the exception items is only possible if they are of a files, attachments, or messages type where access is still available. Invalid folders, inaccessible data stores, corrupt lists and other types of non-document exceptions cannot be exported.

Column Descriptions

	Descriptions
Description	Short description of the exception
Type	<p>Exceptions are broken down into several types to help distinguish the status.</p> <ul style="list-style-type: none"> • Error: An unexpected exception occurred to stop a portion of the search, which might be correctable. This can happen on the task, data store, folder, container or item level. Permission issues, various MAPI errors and file corruption are examples of this type of exception. • Skip: Items that Discovery Attender will not be able to process, a.k.a. a 'perpetual error'. Items of this type are unable to convert files for parsing, empty attachments, encrypted or password protected files. • Warning: These exceptions are notifications to the users that something happened that they should be aware of, but which did not compromise the search. Examples of this would be items that could not be saved to the cache, or issues with files inside a zip file. • Unknown: The cause of the exception is unknown and could not be classified.
Level	Exceptions can take place in many locations. This column gives a general indication of

	<p>what part of the process generated the error</p> <ul style="list-style-type: none"> • Container: This exception occurs on an item within a container. An example would be a password protected file compressed in a zip file. Other files in that compressed file may be searchable. • Data Store: The exception happened on the data store level. An example of this would be an Access or Network error. • Document: Attempting to search a message, attachment or file throws an exception. • File: Used for SharePoint search only, the exception is on a file level. • Folder: Querying or accessing a folder in a data store causes an exception. • Item: Exception was found on a SharePoint item. • List: Exception found on a SharePoint list level. • Task: Creating or launching a task throws an error. • Site: The exception occurred on a SharePoint site level.
Detail	More descriptive detail for the exception, if any.
Item Type	If this is a Document level error, what type of item are we dealing with: Message, Attachment or File
Item Name	If the exception is on the Document level, what is the item name.
File Type	If this is a file type, what is the extension (used for sorting types).
Date	On a document level, the received date for messages, modified date for files.
Path	On document level, what is the path of the item (internal path, PST path, archive path, file path).
Subject	For email items only.
Sender	For email items only.
Export Path	If the exception item is exported using the Copy to File function, this lists the export path.
Store Type	The data store type: Mailbox, Public Folder, PST, Archive, Path.
Data Store	Name of the data store.

Toolbar and Menu Options



Refresh	On the toolbar only, refreshes the list of exceptions in an on-going search.
Select All	Context Menu only, select all items in the list.
Open	For document level results only, attempts to open the item. Useful for attachment results to see the source message, but most file and message errors will not be able to be opened.
Copy to File	For document level items only, copies the item referenced in the exception to a location chosen by the user. This option can be very useful for creating an exception set for production, however, not all exceptions can be exported. This option is very similar to the

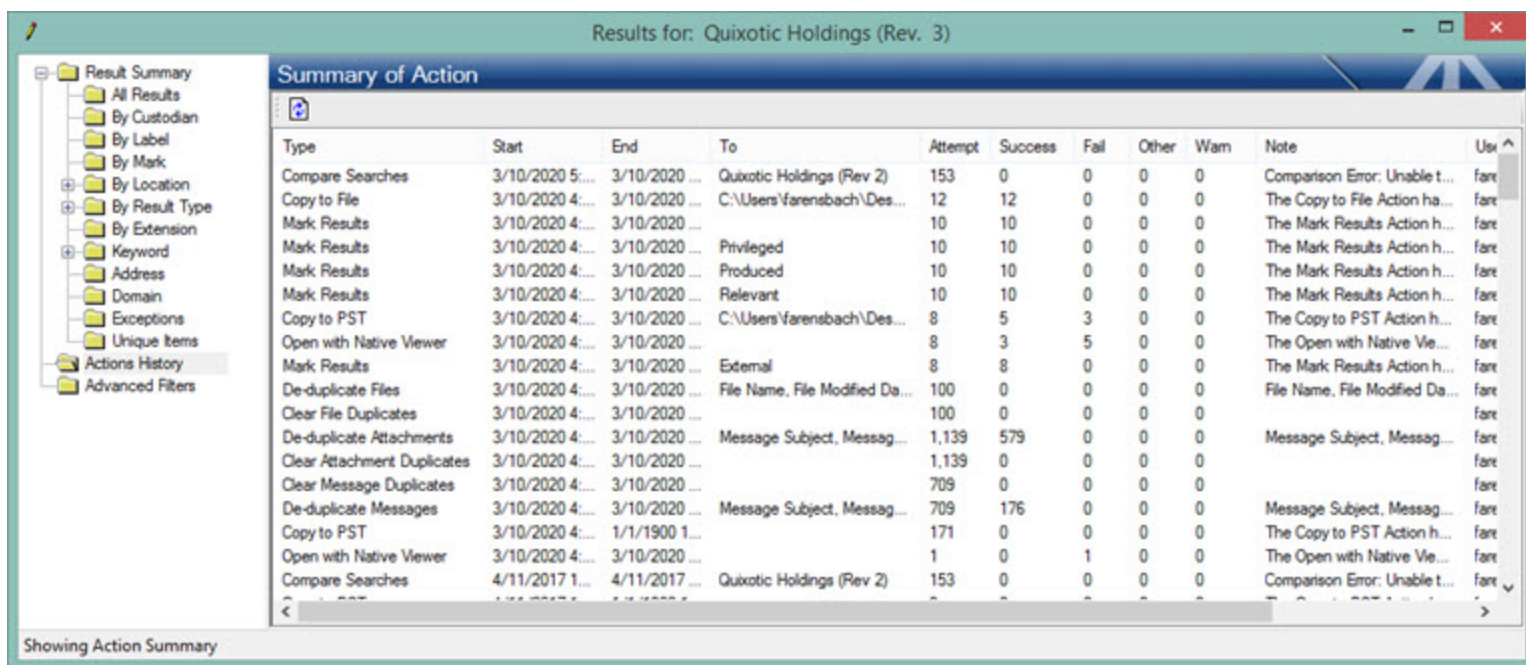
	Actions; <ul style="list-style-type: none"> • Verify the items you want to copy • Select a Destination Directory • Watch the Action in Progress • View the log file if there are any errors exporting.
Export to CSV	This creates a CSV file of this list of Exceptions.
Filter By:	Drop down boxes used to create filters by <i>Exception Type</i> , <i>Level</i> and <i>Item Type</i> .

See Also

- [Main Console](#)
- [Troubleshooting](#)
- [Handling Exceptions](#)

Result View: Action History

This view shows the history of all the actions taken on this result set. Log files for the individual action can be viewed by double clicking on any particular entry.



Columns

	Description
Type	Action taken on the result set item.
Start	Starting time of the action.

End	Ending time of the action.
To	Location the user entered for the action to export the item
Attempt	Number of items attempted for this action.
Success	Number of results successfully processed for this action.
Fail	Number of results which failed to process for this action
Other	Items which were not processed, but did not fail. This can happen when attachments were not copied because their source message has already been copied.
Warn	Number of warnings received when processing this action
Note	Description of the action with details of how it was run
User	User who initiated the action.
Machine	Machine that initiated the action.

Result View: Advanced Filter Summary

A user can create an Advanced Filter to search within the result set for keywords, addresses or dates. This view lists those filters and provides a gateway to create and manage them.

The screenshot shows the 'Advanced Result Filters' window. The left sidebar contains a tree view with the following structure:

- Result Summary
 - All Results
 - By Custodian
 - By Label
 - By Mark
 - By Location
 - Mailbox
 - EWS Mailbox
 - PST
 - NSF
 - File Path
 - MSG
 - Email Path
 - By Result Type
 - Message
 - Attachment
 - File
 - Container
 - By Extension
 - Keyword
 - By Leaf
 - By Branch
 - By Original
 - Address
 - Domain
 - Exceptions
 - Unique Items
 - Actions History
 - Advanced Filters
 - Yahoo Rev. 1
 - Shepa Filter Rev. 1
 - Date 2014 Rev. 1

The main area of the window displays a table with the following data:

Filter Name	Run By	Date First Run	Index	Dates	Address	Properties	Matches
Yahoo (Rev 1)	farensbach	3/11/2020 11:...	False	False	True	False	96
Shepa Filter (Rev 1)	farensbach	3/11/2020 11:...	False	False	True	False	261
Date 2014 (Rev 1)	farensbach	3/11/2020 11:...	False	True	False	False	143

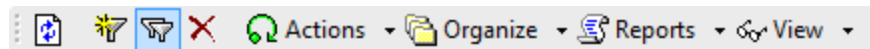
At the bottom of the window, it says 'Showing Advanced Result Filters Main Form'.

Columns

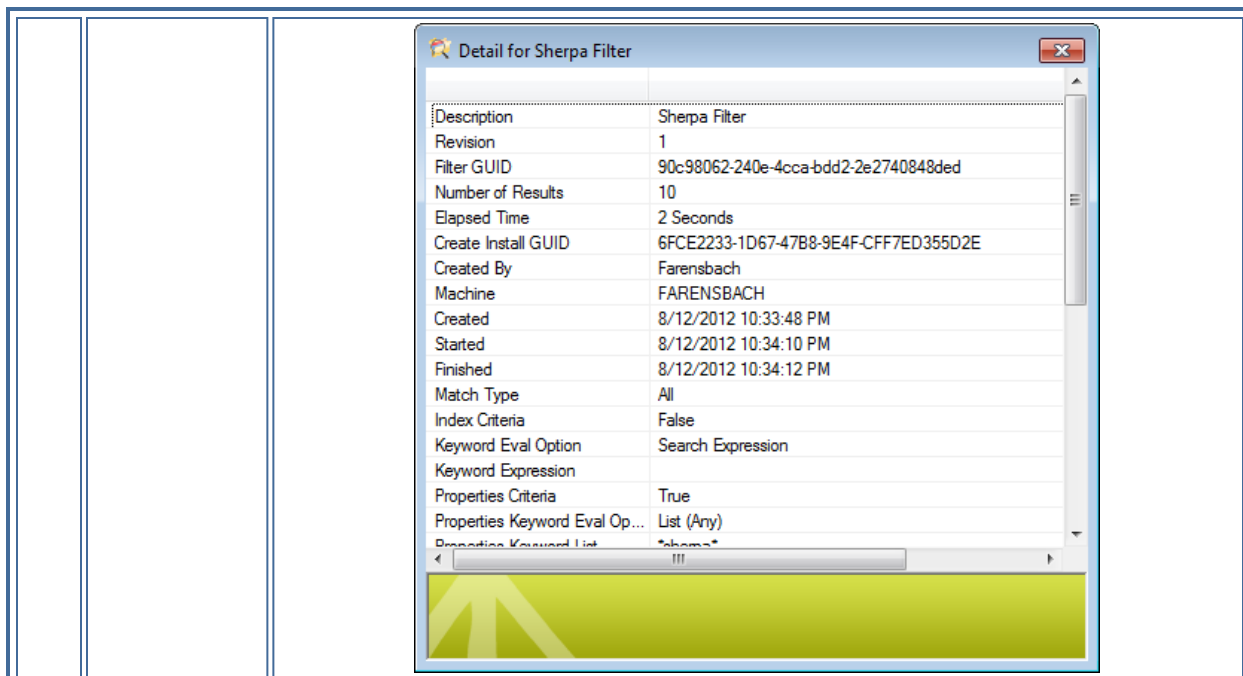
	Description
<i>Filter Name</i>	Name given to the filter when it was created
<i>Run By</i>	Name of Login ID who ran the filter
<i>Date Run</i>	Date the filter was run
<i>Keyword</i>	Was Keyword criteria used?
<i>Dates</i>	Was Date criteria used?
<i>Address</i>	Was Address criteria used?
<i>Matches</i>	How many result set items matched the criteria.

Toolbar and Menus

The toolbar items on this screen are different from those you'll see in other views.

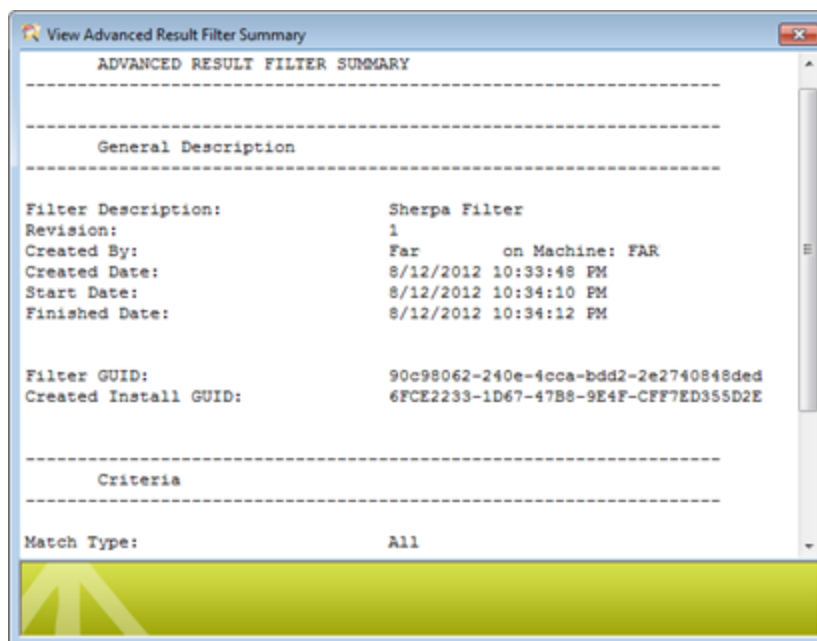


Icon	Text	Description
	<i>Refresh</i>	Refreshes the current screen
	<i>New Filter</i>	Creates a new Advanced Result Filter using the wizard
	<i>Copy Filter</i>	Copies the selected filter and pre-populates a new Advanced Result Filter with the details.
	<i>Delete Filter</i>	Deletes the selected filter
	<i>Ignore All</i>	Ignores all result items found with the selected filter
	<i>Label All Items</i>	Labels all the items in the filter with the selected label.
	<i>Mark All Items</i>	Marks all the result items in the filter with the selected Mark
	<i>Show Detail</i>	Shows the details for this filter



Show Summary

Shows the summary for a filter



Result View: Address Detail

The Address detail node allows a user to see all results for a given address. In addition to the standard results, this node also shows the Address Type (Sender, Recipient) and the count. Address nodes are created by Double-Clicking a listed address in the [Address node](#) view.

Columns

	Description
Address Type	Explains how the address was used in the result item listed.
Count	Indicated the number (of this address) found in the result item for this type.
Location	Original mail store location for this result.
Sender	Sender of the message.
Sent Date	Sending date of the email.
Item Type	Item type (message or attachment).

- Results may be listed more than once on this screen. This is because most senders also have entries in the 'On Behalf Of' fields.
- Please see the [menu page](#) to learn about the toolbar and context menu for this page.

Result View: By Result Type - Message

By clicking on the Message icon underneath the "By Result Type" left side navigation item, the administrator can view statistics about the sub result set of message items that met the search criteria.

Columns

	Description
Location	Mail store where message was originally found. Name of Mailbox, Public Folder or PST.
Internal Path	Path inside the mail store in which the result is found.
Sender	Address where the email was sent from.
Sent Date	Date the email was sent.
Received	Date the email was received.
Subject	Subject of the email.
Created	Creation date of the email.
Modified	Modification date of the email, if any.
Size	Size of the email.
Message Class	The message's Message Class.
Internet ID	Type of identifier for many Internet based address. Gaining wider use with in more recent versions of Exchange. However, earlier versions of Exchange did not always populate this field, especially with messages sent within a server.

Topic	Conversation topic for the message. Use to identify threads.
Hash	Digital footprint of the message body. Uses plain text body for hashing, stored in 64 bit encoding.
TO	Count of 'To' recipients.
CC	Count of 'CC' (Carbon Copy) recipients.
BCC	Count of 'BCC' (Blind Carbon Copy) recipients.
I	Importance level of this message.
P	Priority of this message.
S	Sensitivity of this message.
Read	Was the message read?
Type	'Message' is a generic term for items stored in an Exchange mail store or PST file. They can be Email, Calendar entries, Contacts etc. This field clarifies the Message Type.
Att Num	Number of attachments in this message
Action Location	The path and file details for the last action performed on this result

- For even more detail about each message item, go to [View | Item Details](#)
- Please see the [menu page](#) to learn about the toolbar and context menu for this page. The column description can be found in the [All Results view](#).

Result View: By Result Type - File

This view shows file results with file specific details. It is accessed by clicking on the File icon underneath the "By Result Type" left side navigation item. If files were not searched, then this option will not be listed.

Columns

	Description
Name	File name of the result item.
Description	File type, if available
Path	File path where the result was found
Created	Result set item creation date.
Modified	Result set item modification date.
Accessed	Result set item last accessed date.
Size	Size of file item.
Hash	Unique digital footprint for the file.
Action Location	The path and file details for the last action performed on this result

Please see the [menu page](#) to learn about the toolbar and context menu for this page. The column description can be found in the [All Results view](#).

Result View: By Result Type - Container Items

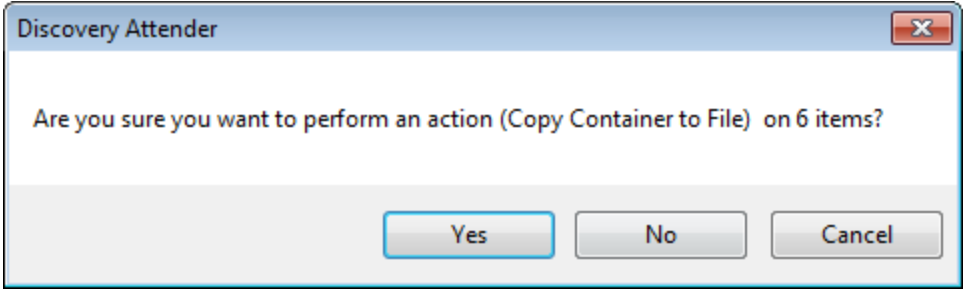
Lists all the items found in compressed files, whether they were a hit or not. This is only present if the correct options were selected. It is unusual because the totals you see here are distinct for this form.

Hit	Item Name	Internal Container Path	Source File Name	Source Type	Modified	Size (...)	MD5 ...	Position	Keywords	Last Ex
True	DA_BugFixes.xls	PracticeFiles\compressed files\	pwd.zip from me...	Attac...	8/11/...	215 KB		1	sherpa: ...	
True	DA_BugFixes.xls	PracticeFiles\compressed files\	pwd.zip from me...	Attac...	8/11/...	215 KB		1	sherpa: ...	
True	DA_BugFixes_2.xls	PracticeFiles\compressed files\	pwd.zip from me...	Attac...	8/11/...	218 KB		2	sherpa: ...	
True	DA_BugFixes.xls	PracticeFiles\compressed files\	pwd.zip from me...	Attac...	8/11/...	215 KB		1	green: l ...	
True	DA_BugFixes.xls	PracticeFiles\compressed files\	pwd.zip from me...	Attac...	8/11/...	215 KB		1	sherpa: ...	
True	DA_BugFixes_2.xls	PracticeFiles\compressed files\	pwd.zip from me...	Attac...	8/11/...	218 KB		2	sherpa: ...	
True	DA_BugFixes_2.xls	PracticeFiles\compressed files\	pwd.zip from me...	Attac...	8/11/...	218 KB		2	sherpa: ...	
True	DA_BugFixes.xls	PracticeFiles\compressed files\	pwd.zip from me...	Attac...	8/11/...	215 KB		1	sherpa: ...	
True	DA_BugFixes_2.xls	PracticeFiles\compressed files\	pwd.zip from me...	Attac...	8/11/...	218 KB		2	sherpa: ...	
True	DA_BugFixes_2.xls	PracticeFiles\compressed files\	pwd.zip from me...	Attac...	8/11/...	218 KB		2	sherpa: ...	
False	ADResumeRanking.xls	[ABC.zip]	_XYZ.zip	File	3/2/2...	22 KB		8		
False	Average-Family-Budget.xls	[ABC.zip]	_XYZ.zip	File	3/2/2...	34 KB		7		
True	alepuniv.edu.sy_529_5832...	[ABC.zip]	_XYZ.zip	File	3/2/2...	60 KB		6	collins: ...	S:\Testi
True	71_CV12.09-1.docx	[ABC.zip _123_SmallSet.zip]	_XYZ.zip	File	3/2/2...	64 KB		12	green: r...	S:\Testi
True	08db03nr.xls	[ABC.zip _123_SmallSet.zip]	_XYZ.zip	File	3/2/2...	48 KB		11	collins: ...	S:\Testi
False	2010 MFB - KickOFF - v2.2...	[ABC.zip _123_SmallSet.zip]	_XYZ.zip	File	3/2/2...	15 KB		10		
False	2010 MFB - KickOFF - v2.2...	[_123_SmallSet.zip]	ABC.zip	File	3/2/2...	15 KB		5		
True	08db03nr.xls	[_123_SmallSet.zip]	ABC.zip	File	3/2/2...	48 KB		6	collins: ...	S:\Testi
True	71_CV12.09-1.docx	[_123_SmallSet.zip]	ABC.zip	File	3/2/2...	64 KB		7	green: r...	S:\Testi
False	meta.xml		dbcc2cea-90b0-...	Attac...	8/29/...	3 KB		2		
False	c.txt		Simple.zip from ...	Attac...	5/9/2...	3 Bytes		1		
False	Copy of B.txt		Simple.zip from ...	Attac...	5/9/2...	8 Bytes		7		
True	List Report.htm		Mail Attender Lis...	Attac...	1/1/0...	9 KB		38885	sherpa: ...	

	Description
Hit	Was this container item a hit: True or False
File Name	Name of the container item
File Path	Internal path of the container item inside the compressed file
Source File Name	The name of the source compressed file
Modified	Container item file modification date.
Accessed	Result set item last accessed date.
Size	Original size of the container item file (before compression)
Compressed	Size after compression. Please note: Not all container files have this information available. In that case, this value will read 0.
MD5	Hash of this container item file
Position	Where the file is location within the compressed container

Keywords	If this was a hit, what keywords matched for this container item
-----------------	--

The menu options on this page differ from the general options. You can export the individual matching items from a container using the Copy to File option:



The export path is kept in the data base and the source container item will have the status changed to read 'Copy Container to File'. A log file is generated and is accessible via Action History.

Result View: By Result Type - Attachment

By clicking on the Attachment icon underneath the "By Result Type" left side navigation item, the user can view details specific to attachment results and their source messages. If attachments were not searched, then the attachment option will not be listed.

	Description
Att Name	Title of attachment. File name.
Description	File type of attachment, if known.
Location	Original mail store for this item.
Type	Type of attachment: File, Message, Shortcut, Embedded Object etc.
Created	When this attachment was created (according to the item property).
Modified	When this attachment was last modified (according to the item property).
Label	The label within the message for this attachment. This can differ from the file name, especially in cases of URLs.
Size	Size of the attachment.
Message Class	The Message Class of the attachment's parent message.
Hash	Digital fingerprint of the attachment. Note: stored with 64 bit encoding.
Sender	Address where the email was sent from.
Sent Date	Date the email was sent.
Received	Date the email was received.
Subject	Subject of the email.
Created	Creation date of the email.
Modified	Modification date of the email, if any.

Size	Size of the email.
Internet ID	Type of identifier for many Internet based address. Gaining wider use with in more recent versions of Exchange. However, earlier versions of Exchange did not always populate this field, especially with messages sent within a server.
Topic	Conversation topic for the message. Use to identify threads.
Hash	Digital footprint of the message body. Uses plain text body for hashing, stored in 64 bit encoding.
TO	Count of 'To' recipients.
CC	Count of 'CC' (Carbon Copy) recipients.
BCC	Count of 'BCC' (Blind Carbon Copy) recipients.
Action Location	The path and file details for the last action performed on this result

Please see the [menu page](#) to learn about the toolbar and context menu for this page. The column description can be found in the [All Results view](#).

Result View: Location Detail

A node is created for each type data store included in the [search](#). Clicking on the Mailbox, PST, Public Folder, Archive or File Path node will populate a further set of sub-nodes, one for each location included the search. By selecting the location views, you can show the list of results for that location.

This view is a standard detail views. Please see the [menu page](#) to learn about the toolbar and context menu for this page. The column description can be found in the [All Results view](#).

Result View: Label Detail

Once [labels](#) are assigned to a subset of result items, a new node will be created or updated for that label under the [By Label](#) summary node.

This is one of the standard detail views. Please see the [menu page](#) to learn about the toolbar and context menu for this page. The column description can be found in the [All Results view](#).

Result View: Keyword Detail

This view lists the results for a selected keyword node be if Leaf, Branch, or Original Expression. If the Complete search was used, every result which matched that keyword or phrase will be included in this list.

- This view may not be populated if the user is not [keeping keyword details](#), or if the [complete](#) search was not used.
- This is one of the standard detail views. Please see the [menu page](#) to learn about the toolbar and context menu for this page. The column description can be found in the [All Results view](#).

Result View: Advanced Filter Detail

After an [Advanced Result Filter](#) is created, the results are displayed in a detail node created underneath the main Advanced Filters Node. This sub-node is created when a new filter has been created, or, when you double click on a previously created filter in the [Advanced Result Filter Summary](#) view. The name of the node is the description entered for the filter.

This is one of the standard detail views. Please see the [menu page](#) to learn about the toolbar and context menu for this page. The column description can be found in the [All Results view](#).

Actions Summary

The views accessed from the [Result Management](#) window provide the gateway for a number of user initiated actions.

- Menus on each view will differ slightly, however the functionality remains the same within the scope of the view. For example, the actions for copying NSF results are not enabled unless a Lotus Notes NSF sourced items is selected.
- You can select most actions by clicking on the toolbar or context (Right Click) menu. One difference with the context menu is that you will be presented with two choices for opening items:
- Be sure to see [Tools | Settings](#) screen for additional custom action properties. Advanced Actions (Move and Delete) only appear if that [option](#) is enabled in the settings.
- For all screens except the Result summary, only items selected in that view will be affected by the action selected. If you perform an action from the Result Summary view, *all* results will be included.

	Description
Open	The selected result item is opened. See the Opening Results section for more information.
<i>Open Native Viewer</i>	Opens the result in the native viewer, regardless of the default setting. Please note: the source application must be installed to view the item natively, e.g. Microsoft Word for a .doc file.
<i>Open Sherpa Viewer</i>	Opens the result in the Sherpa Text Viewer, regardless of the default settings. Please note: The Sherpa Text Viewer must be installed to view items using this option.
Export	
Copy to PST	Copies message items from pointed location and saves it to a user defined PST file.
Copy to Individual File	Makes a copy of the result item and saves it as an .MSG or .EML file to a user defined location.
Copy to NSF	Copies message items from pointed location and saves it to a user defined NSF file.
Copy NSF	Makes a copy of the result item and saves it as an EML file to a user defined location.

Result to File	
Ignore/Unignore	<p>Sets the Results so it is not shown in filters, sorts, and reporting. The items will not be exported, or included in reports.</p> <p>To view the items that have been previously ignored, select 'View>Include Ignored' from the tool bar or context menu.</p>
Deduplicate	Excludes duplicates from your export result set by utilizing result properties to find duplicate items, marking them, and creating a view with just the unique items in the Unique Items node.
Compare Searches	Compares the results in currently open search against those of a previously run search
Match GUIDs	<p>This option starts a wizard which takes a text file listing of result guids and marks them to results in the current search. The best way to get a list of files for editing is to use the List View CSV report.</p> <p>Note:</p> <ul style="list-style-type: none"> • The file must be in .txt format with one GUID per line • Only GUIDs that are present in the current search will be matched.
Rest Actions	<p>Once an action is performed, the Action Status and Action Location are recorded in the database for each result record. In addition, the color of the results are changed to reflect the last action performed on that result. This option will clear all those settings and change the color back to the default.</p> <p>Please note, the action history and internal logs of the actions can not be cleared.</p>
Advanced	This option is enabled in Tools Settings Export Actions 'Enable Advanced Settings'. Once this option is checked, the following actions will be available to users.
Move to PST	<p>This two step process copies message items from pointed location (an Exchange Server or PST file) to a user defined PST file, then deletes the message from the original mailbox, PST file or Public folder. Use with caution. The item cannot be retrieved again. See Export to PST for more detail.</p> <ul style="list-style-type: none"> • Items that have been cached, cannot be moved or deleted. • Archive Attender items cannot be moved or deleted. • Only available if Advanced Actions are enabled.
Move to File	<p>Copies the item to a user defined location, then deletes the original item. Use with caution. Once moved, the item cannot be retrieved from the original location. See Export to File for more detail.</p> <ul style="list-style-type: none"> • Items that have been cached, cannot be moved or deleted. • Archive Attender items cannot be moved or deleted. • Only available if Advanced Actions are enabled.
Move to MSG	This option moves email results to individual files. Users can use the Settings options to choose between MSG or EML export formats, among other things. See 'Move to File' for full details.

Delete	<p>Only available if Advanced Options are enabled.</p> <p>Please note: This option permanently eliminates, deletes, obliterates, eradicates the referenced item. No copy is kept. No copy is saved. Item is deleted from the original location. Use with caution. The item cannot be retrieved again.</p> <p>See Delete Consideration for more detail on deleting from mail stores.</p>
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Cached Items

When a search is created, users are given the [choice](#) to Cache (i.e. create a local copy of) message and attachment results. The result items are copied from their original location to the 'Messages' directory under the unique search folder in the project location. This cached repository item is not intended to be the final export. Users should use Export options to properly copy and format the results.

The local items are stored in different formats depending on the original source:

- If a message or attachment was originally stored in a supported Microsoft data store (e.g. Exchange Mailbox or PST file), then the cached item will be in .MSG format. This format can be opened in Outlook.
- If the item was originally stored in a Lotus Notes NSF mail file, the cached items are placed in a NSF file. One cached NSF file is created per source location (task).
- **Files, regardless of their origin, are not cached or stored locally.**

If the cache option was selected, the database will keep details about the original location of the items, but will only reference or 'point' to the local copy.

- Actions taken against the result item will apply to the local copy.
- You are not able to Move or Delete cached items.
- If the Cache option was NOT selected, the original location will be referenced and pointed. In that case, all actions are taken against the original message.

Some Notes on Actions

- Directory Hits cannot be copied or moved. Double clicking or opening a Directory result will open the selected directory in Windows Explorer.
- To copy all items in a search, simply select one of the *Action | Copy All* options from the toolbar on the Result Summary screen.
- Actions can be performed on multiple items. Simply select the items and click the appropriate tool bar button or menu choice. To select multiple connecting items, use your mouse to select an item while holding down the Shift key. To select non-contiguous items, use the Control key.
- *Hard Actions* affect the result item itself (i.e. the referenced file, message or attachment). These actions are permanent.
- *Soft Actions* only affect the entry in the database and can be reversed or cleared.
- Each major action creates its own log file. If an action fails, an error is entered into that action's log with

a detailed description. This log file will appear at the end of the action. These log files can also be reached by going to the Action History node in the Results.

- You can view the progress of the actions and cancel them, if needed, from the [Actions In Progress Window](#).

Export to File Considerations

When an item is moved or copied to a file, the user is prompted for a destination location. By default, Discovery Attender will iterate file names (e.g. 'FileName_1.txt') to prevent results with the same name from overwriting each other in the new location. There are a variety of options to avoid this; please see the [Settings](#) for more detail on using unique identifiers, folder options and counters.

Export to PST Considerations

- Non-message files and directories cannot be copied or moved into a PST.
- Message files (.msg files found on the hard drive or network) can be copied or moved into a PST file.
- All items *will* be deleted from their original location with "Move to PST". If you do not want to delete the original message or file, choose "Copy to PST".
- Attachments will be copied as part of their original source message. This could cause some duplication of messages in the PST files if the source message also fits the search criteria.
- You cannot copy or move a message to or from an *open* PST file (i.e. if it is being searched or in use via an Outlook client). Export PST files remain open during the copy or move and cannot be opened for searching or by an Outlook client while the action is taking place.
- See [PST Limitations](#) for details on limitations of these actions

Delete Considerations

Cached Items

Results cannot be deleted if the '[Cache](#)' option was enabled during the search. Since items found in Office 365 are automatically cached, these results also cannot be deleted.

SharePoint

Files that are found on a SharePoint server cannot be deleted.

Attachments

If you are deleting an attachment result, the entire source message is deleted from the mail store.

Exchange Mail Stores

By default, all message deletions from Exchange data stores are 'Soft Delete', i.e. moving the items to the {Recover Deleted Items} folder. You can modify this behavior in the [Settings](#). If Dumpsters are *not* enabled on the Exchange server, or you are deleting from a Dumpster ({Recover Deleted Items}), the 'Delete' will be a 'Hard Delete' and those items will not be recoverable.

Opening Results for Viewing

Double Clicking on an entry in the Results screen will open it from its pointed location (local or original source). The viewer used when opening a result via double clicking is dependent on the default option selected in the [Tools | Settings | View Options](#).

- Choosing Sherpa Viewer will open all items in the [Sherpa Text Viewer](#) whenever possible.
- The Native Viewer uses the following as a guideline:

Messages	The message item is copied to a local temp directory where it is opened as a .MSG file via Outlook. All attachments will be visible. Please note: Make sure read receipts are turned off in Outlook, or work on a machine with no email access.
Attachments	The source message for the attachment is copied to a local temp directory where it is opened as a .MSG file in Outlook. See Note above.
Directory Paths	The path listed will open in a Windows Explorer session.
Files	Discovery Attender will open the file using the registered program associated with the file type or extension. If there is none, a Windows Explorer session will be opened at the location of the file.

Please Note

The local temporary directory (Temp) in the installation directory used to store items will be cleared every time Discovery Attender is opened. Never save important data to that location. You also have the option to change the temp directory used by Discovery Attender in [Tools | Settings | Search](#).

Due to potentially dangerous items in certain file types, some files are opened in Notepad, or are not opened at all. They are listed below.

Caution Files: The following File Types are opened with notepad.exe to prevent potentially dangerous files from executing:

File Extension	Description
.bas	Visual Basic Class Module
.bat	MS Dos Batch File
.cmd	Windows Command Script
.js	JavaScript File
.vbe	VBScript Encoded Script File
.vbs	Visual Basic Script
.vs	VBScript File
.wsh	Windows Scripting Host

Dangerous: The following types are not opened at all. Double clicking on these file types will open a Windows Explorer session pointed to the file location:

File Extension	Description
.com	MS-Dos File
.cpl	Control Panel Extension
.exe	Windows Application File
.reg	Registry File
.scf	Screen Saver

See Also

[Result Management](#)

Actions: Copy to PST

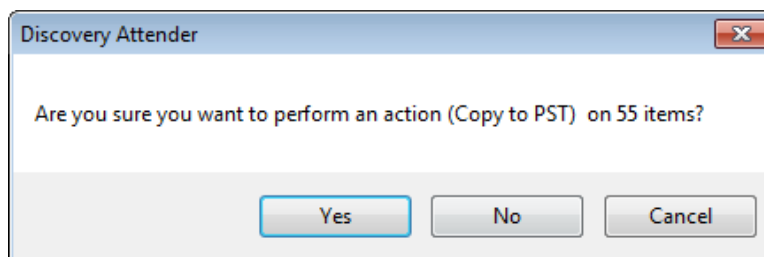
This action allows a user to copy message or attachment hits to a PST file. Loose message files (in .msg format) found on the hard drive or network can also be copied into a PST file.

Please Note:

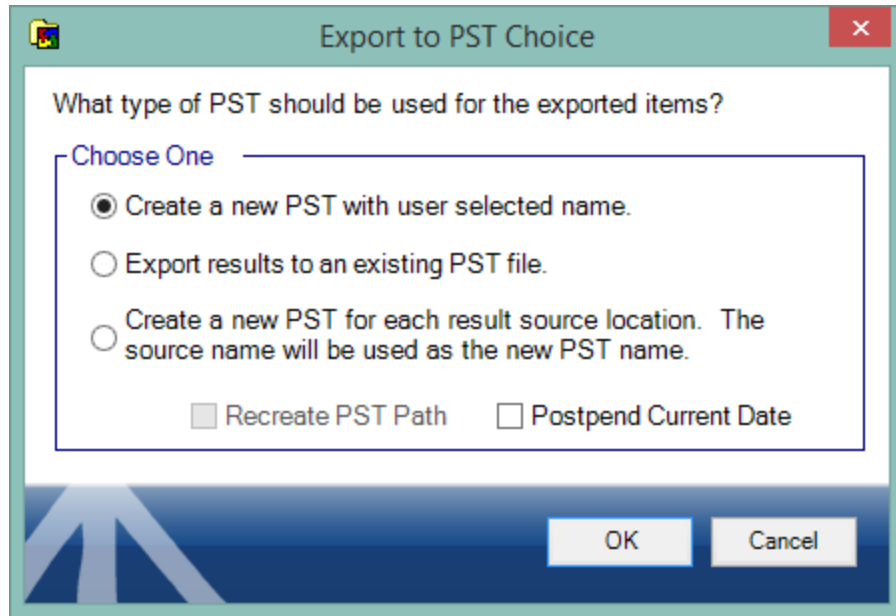
- Before starting your actions, please check the [Export to PST](#) node in the Settings for default PST export options.
- If you have deduplicated and only want to export the **unique items**, you must do so from the [Unique Items](#) node. Exporting from any other view may result in duplicates being included in your final result set.
- Message files (.msg files found on the hard drive or network) can be copied into a PST file. However, the folder structure from the file system will not be maintained.
- Non-message files and directories cannot be copied into a PST file and will fail if attempted.
- Items found in NSF files cannot be copied to a PST.
- Source messages are copied for Attachment results.
- You cannot copy a message to or from an open PST file (i.e. if it is being searched or in use via an Outlook client).
- See [PST Limitations](#) for details on limitations of these actions

Steps for completing a copy to PST

- **Step 1:** Select one or more results by using the mouse, keyboard or 'Select All' options.
- **Step 2:** Use the 'Actions' button in the toolbar or context menu to navigate to *Actions | Copy to PST*.
- **Step 3:** Confirm you want to perform the Copy to PST action on the selected number of results by clicking 'Yes'.



- **Step 4:** If you are copying a large number of results to PST, you may see a dialog warning you of some PST limitations. This does not mean that you will encounter this issue, just that you should verify if your [PST export settings](#) will prevent the issue. Click '**YES**' to continue.
- **Step 5:** Specify what type of PST should be used to contain the exported items:



<p>Create a new PST with user selected name</p>	<p>Creates a new PST where all the exported messages will reside.</p> <p>Click 'OK' and use the dialog box that appears to enter a new PST name and select the path where the new PST will be located.</p> <p>Click 'SAVE' to begin your export.</p>
<p>Export results to an existing PST file</p>	<p>Puts all your exported messages into an existing PST file.</p> <p>Click 'OK', then use the dialog box that appears to select an existing PST file to hold the results.</p> <p>Then click 'OPEN' to begin your export.</p>
<p>Create a new PST for each result source location</p>	<p>Creates a new PST file for each of the source locations included in the original search (provided the location had hits). For example, if you searched ten mailboxes during your search, ten export PST files will be created - one for each mailbox.</p> <p>The export PST will be named in accordance with the mail source type.</p> <ul style="list-style-type: none"> • With PST files, the source file name will be used as the export file name. • For Mailboxes, the source Display Name will form the export file name. • Public Folders will use the mailbox name, plus the suffix '_PF' • MSG files originally found on the local drive will create a PST named 'FileSource.pst'. All messages shall be put in the root directory. • Archive Attender archived messages shall use the original mailbox name, plus the suffix 'Archive' <p>Selecting the 'Recreate PST Path' option will create a file structure that mimics the path of the original source mail store.</p> <p>Click 'OK', then choose the path where you'd like to store your export PSTs. Once you have selected a folder, click 'OK' to begin your export</p>

- **Step 6:** The [Action In Progress](#) dialog box will appear, keeping you informed about the progress of your actions. If you wish to stop your actions at any time, click the 'Cancel' button.
- **Step 7:** Once all your selected items have finished copying, an [Action Summary screen](#) appears giving you the result of your export. If you have any errors, a log file for this action will open.

Your copy to PST is now complete. You may want to generate a [report](#), or view other [Results](#).

Actions: Copy to Individual File

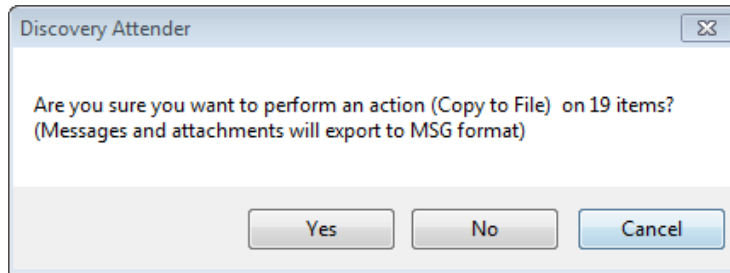
This action makes a copy of the source item and saves it as an individual file to a user defined location. The 'Copy to Individual File' action can be used for email, attachment or file results.

Please Note:

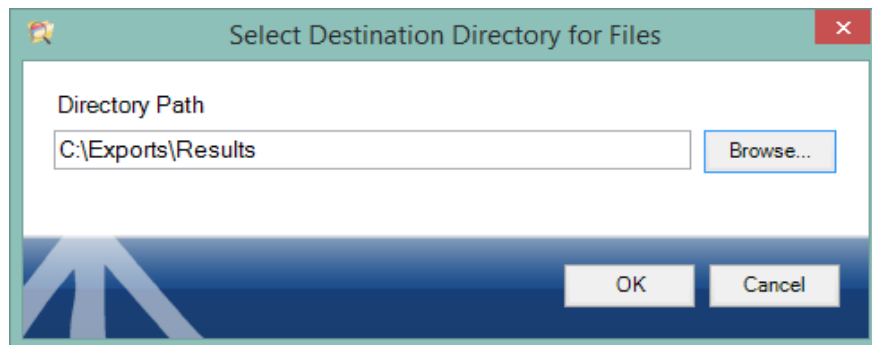
- Before starting your actions, please check the *Export Actions* | [Export to File](#) node in the Settings for default file export options.
- If you are copying an email item (message or attachment), also review the options located in *Export Actions* | [Email Specific](#). One key interest is the export format. For an email item from a non-NSF mail store, the user will have a choice between .MSG or .EML format. From an NSF store, the individual file will always be .EML.
- When exporting files, the file is copied in the exact format of the original file.
- If you have deduplicated and only want to export the **unique items**, you must do so from the [Unique Items](#) node. Exporting from any other view may result in duplicates being included in your final result set.
- *Discovery Attender* will iterate file names (e.g. 'FileName_2.txt') to prevent duplicates from overwriting each other in the new location. If you would prefer to overwrite files with the same name, please see the options available in the *Export Actions* | [Export to File](#) node. Another option is to enable the 'Full Path' Option in the *Export Actions* | [Export to File](#) node in the Settings. Lastly, the settings screens also offer options to add a counter or unique identifier which also prevents the overwriting of files.

Steps for completing a copy to individual file:

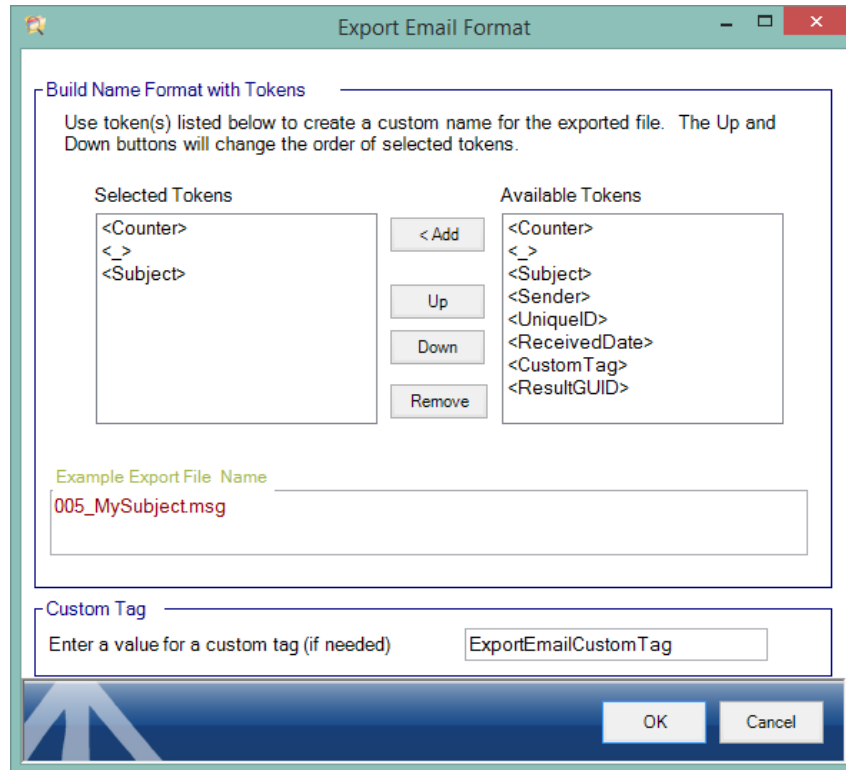
- **Step 1:** Select one or more results by using the mouse, keyboard or 'Select All' menu options.
- **Step 2:** Use the 'Actions' button in the toolbar or context menu to navigate to *Actions* | *Copy to Individual File*.
- **Step 3:** Confirm you want to perform the Copy to File action on the selected number of results by clicking 'Yes'. If your search included message or attachment results, the Export Format Type for messages will be noted.



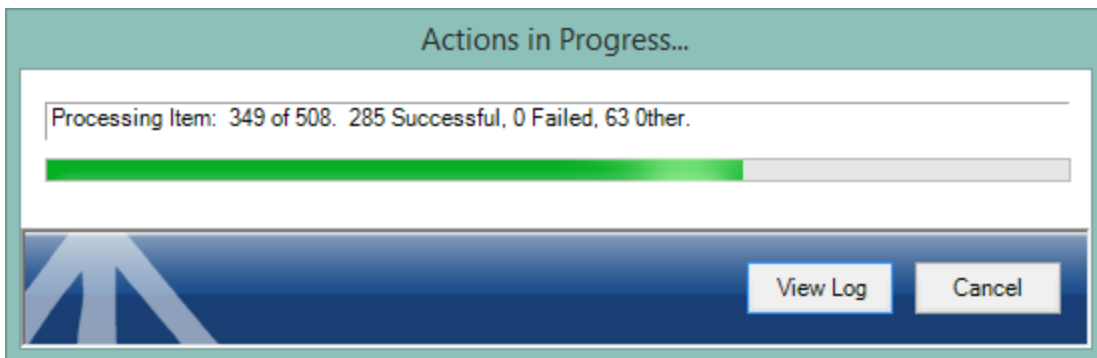
- **Step 4:** Select the destination directory where you'd like to export your files using the Browse button, then click OK



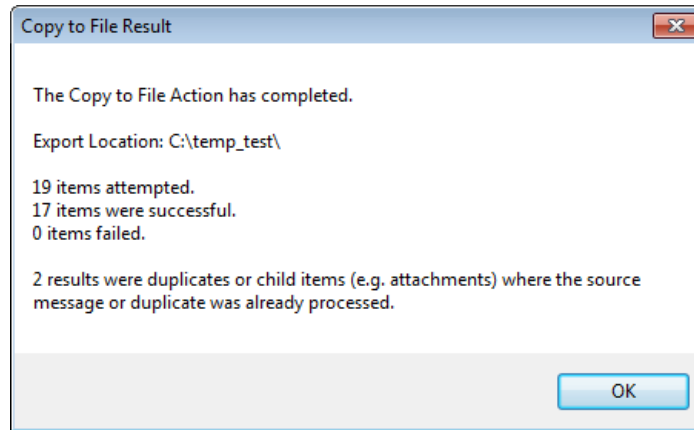
- **Step 5:** Indicate how you wish to name the exported file using the export name format found in the Settings. You can set the defaults on the [Email Specific](#) node of the Settings screen. Note: This screen will not appear if you are exporting files from a file path only search.



- **Step 6:** Click OK to start your copy. The [Action In Progress](#) dialog box will appear, keeping you informed about the progress of your actions. If you wish to stop your actions at any time, click the 'CANCEL' button.



- **Step 7:** Once all your selected items have finished copying, an Action Summary screen appears giving you the result of your export. If you have any errors, a log file for this action will open.



- Your copy to file is now complete. You may want to generate a [report](#), or view other Results.

Actions: Copy to NSF

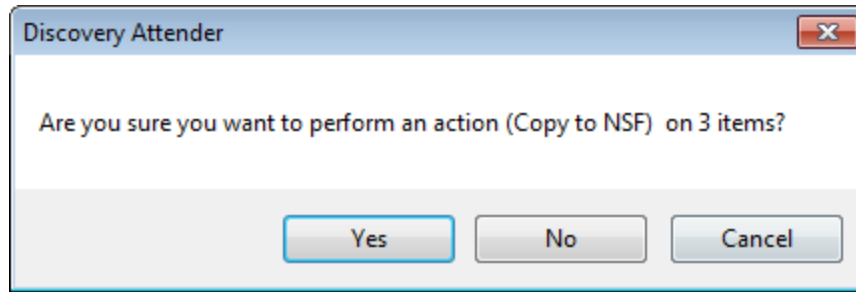
This action allows a user to copy message or attachment hits to a NSF file. Please note: Only email items found in NSF files can be exported to the NSF format.

Please Note:

- Before starting your actions, please check the NSF node in the Settings for default NSF file export options.
- If you have deduplicated and only want to export the **unique items**, you must do so from the Unique Items node. Exporting from any other view may result in duplicates being included in your final result set.
- Loose files and directories results cannot be copied into a NSF file.
- Source messages are copied for Attachment results.
- You cannot copy a message to or from an open NSF file (i.e. if it is being searched or in use via a Lotus Notes client).

Steps for completing a copy to NSF

- **Step 1:** Select one or more results by using the mouse, keyboard or 'Select All' options.
- **Step 2:** Use the 'Actions' button in the toolbar or context menu to navigate to *Actions | Export | Copy to NSF*. Note: This option may not be enabled if non-NSF items are included in the selection.
- **Step 3:** Confirm you want to perform the Copy to NSF action on the selected number of results by clicking 'Yes'.



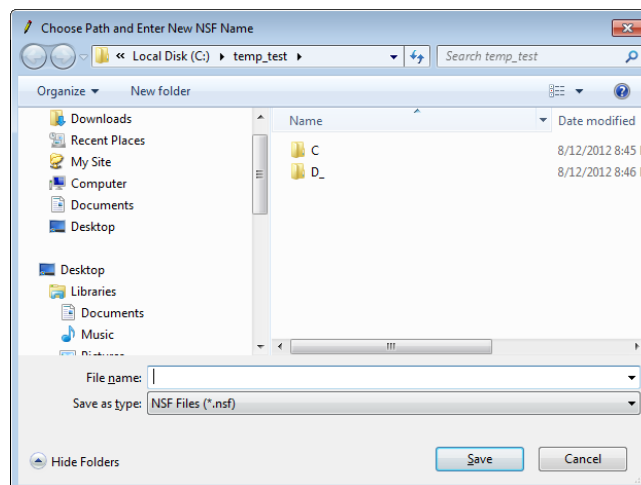
- **Step 4:** Specify what type of NSF should be used to contain the exported items:



Create a new NSF with user selected name

Creates a new NSF where all the exported messages will reside.

Click **'OK'** and use the dialog box that appears to enter a new NSF name and select the path where the new NSF will be located.



	Click ' SAVE ' to begin your export.
Export results to an existing NSF file	<p>Puts all your exported messages into an existing NSF file.</p> <p>Click 'OK', then use the dialog box that appears to select an existing NSF file to hold the results.</p> <p>Then click 'Open' to begin your export.</p>
Create a new NSF for each result source location	<p>Creates a new NSF file for each of the source locations included in the original search (provided the location had hits). For example, if you searched ten NSF mail files during your search, ten export NSF files will be created - one for each source file.</p> <p>Selecting the 'Recreate NSF Path' option will create a file structure that mimics the path of the original source mail store.</p> <p>Click 'OK', then choose the path where you'd like to store your export NSF files. Once you have selected a folder, click 'OK' to begin your export</p>

- **Step 5:** The [Action In Progress](#) dialog box will appear, keeping you informed about the progress of your actions. If you wish to stop your actions at any time, click the 'Cancel' button.
- **Step 6:** Once all your selected items have finished copying, an [Action Summary screen](#) appears giving you the result of your export. If you have any errors, a log file for this action will open.

Your copy to NSF is now complete. You may want to generate a [report](#), or view other [Results](#).

Compare Searches

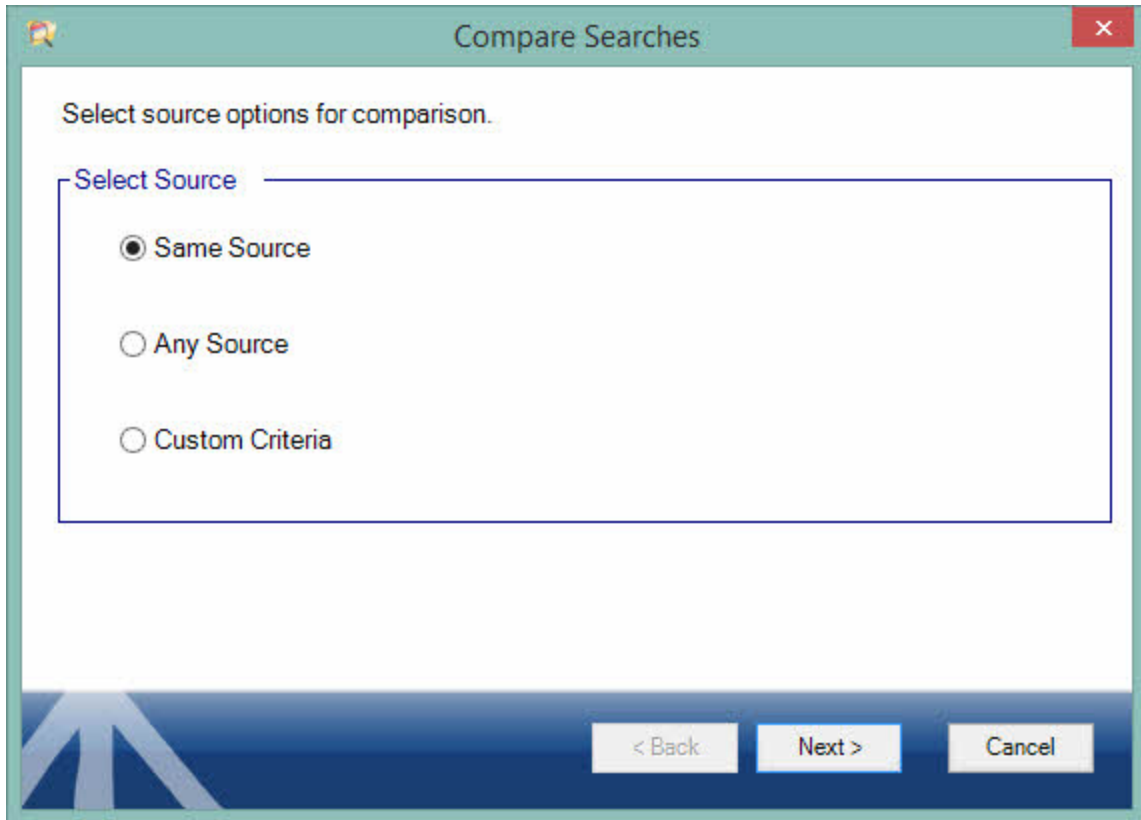
This wizard allows you to compare the results from currently open search to results from one or more searches that has been run previously. This feature is useful to identify results that may be in another search in the same project (e.g. if they have already been produced). If a result item is present in both searches, those identical results found in the current search will be marked with a user selected mark (icon).

This wizard is reached from the Result Summary node in the [Results Management](#) screen. Click *Actions | Compare Searches* to begin.

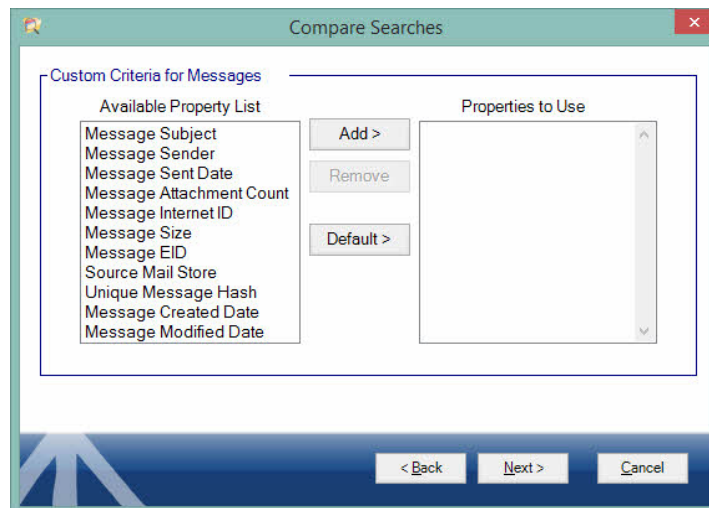
- [Select Type](#)
- [Select Criteria](#) (if needed)
- [Select Search](#)
- [Select Mark](#)
- [Processing](#)
- [Complete](#)

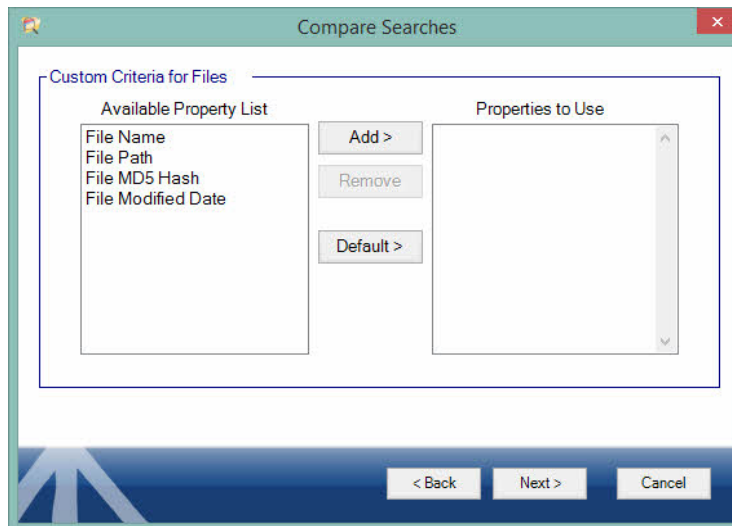
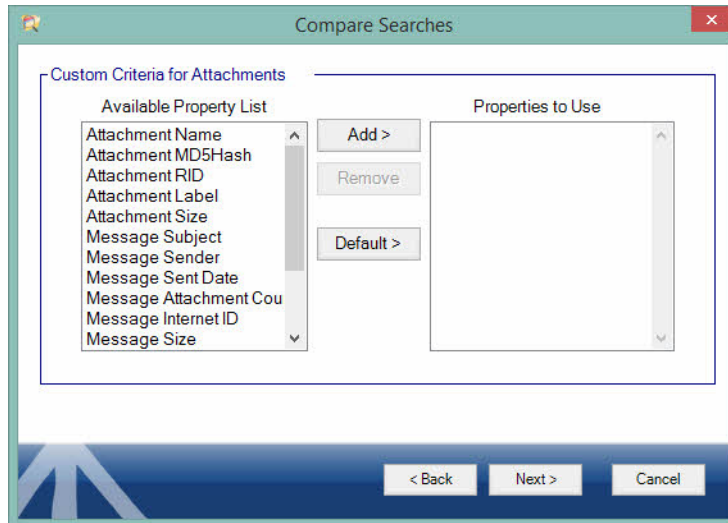
Select Type

To begin the comparison of your searches, first choose the method by which to compare.



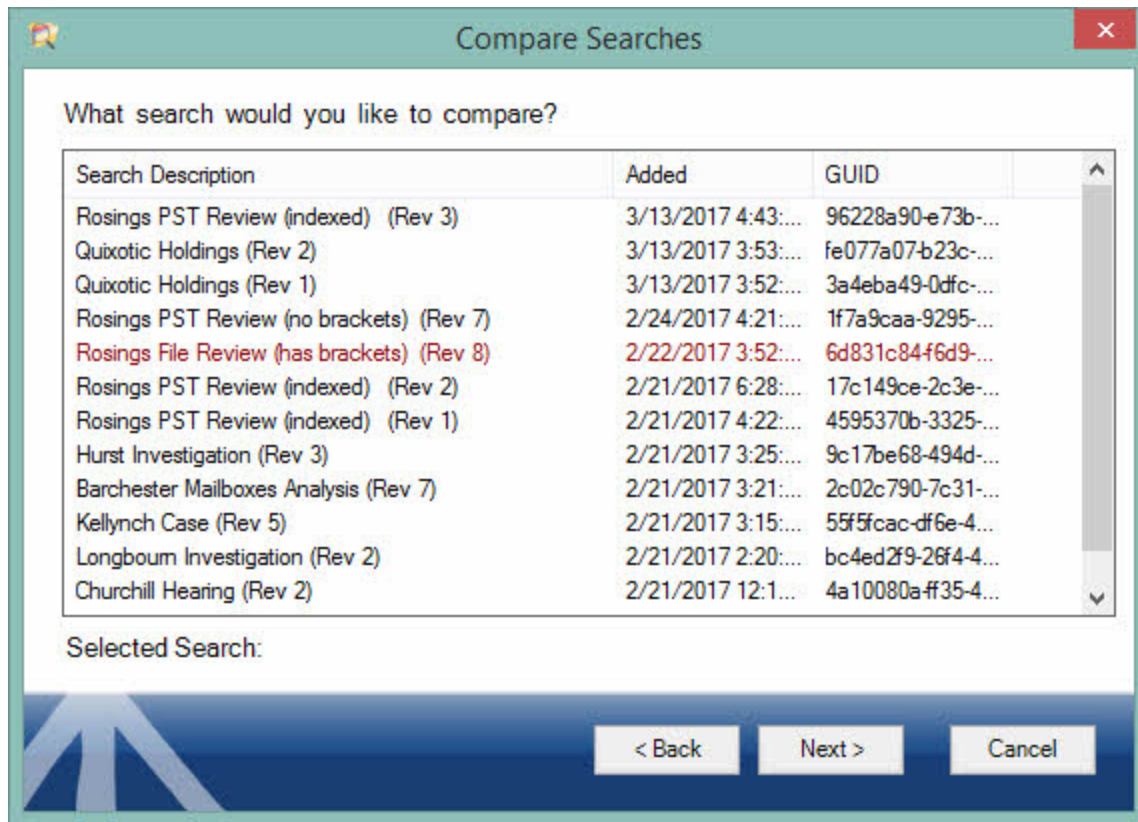
- **Same Source:** This option uses a set of default values to identify items. Only items from the exact same source data store (e.g. mailbox, pst) will be marked.
- **Any Source:** This option uses a set of default values to identify items. Items from any source will be marked. T
- **Custom Criteria:** This option allows the user to select the criteria to identify matching items. When used, this option will open up the Custom Criteria pages. The user chooses criteria from the custom pages, one per result type (Messages, Attachments, Files) .





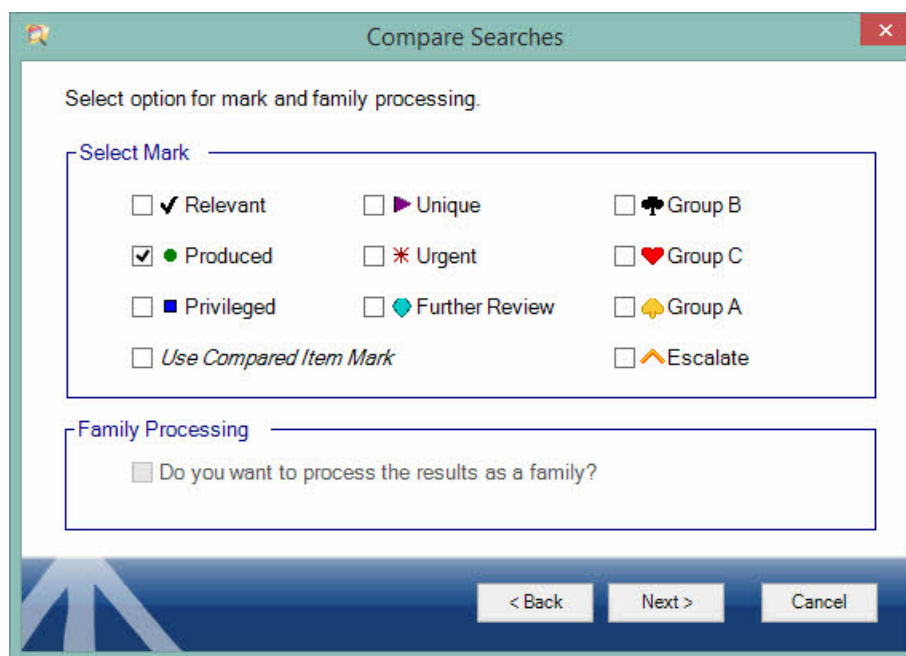
Select Search

Begin by selecting a search or searches you wish to compare against the currently opened search.



Select Mark

Next, select the mark to use to identify the matching items in the current result set.



Note:

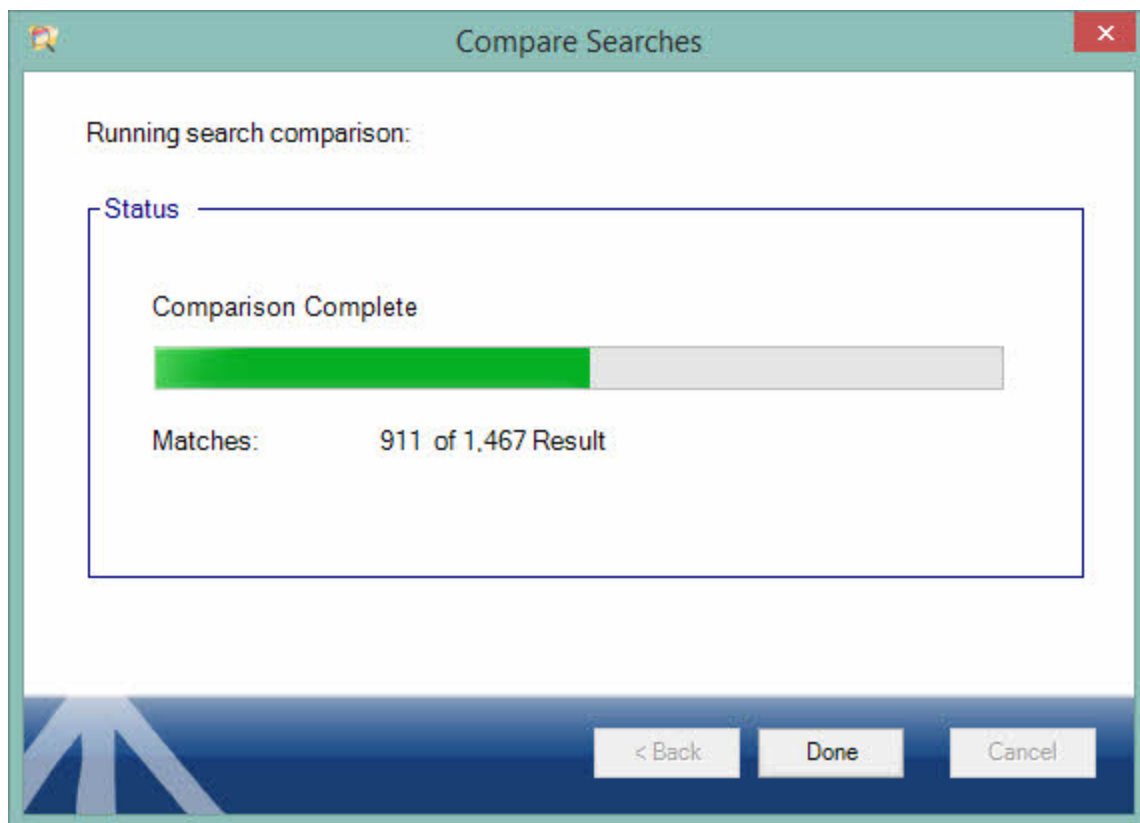
- The text for these marks can be set in *Tools | Settings | View Options*.
- This process does not mark items in the selected search, only those that match in the currently open search.
- All existing marks for the matching items will be replaced by the mark chosen on this page.

Processing

Clicking '**NEXT**' will start the comparison processing. Click '**CANCEL**' to stop the processing.

Complete

Once the results are complete, a total count will appear under 'Results Affected'. All items in the currently open search which match the chosen search will be marked with the icon selected in this wizard.



Actions: Deduplication

Deduplication (or Deduping) is the process of removing duplicates from a result set. Discovery Attender allows the user to select the criteria for an item to be considered a duplicate.

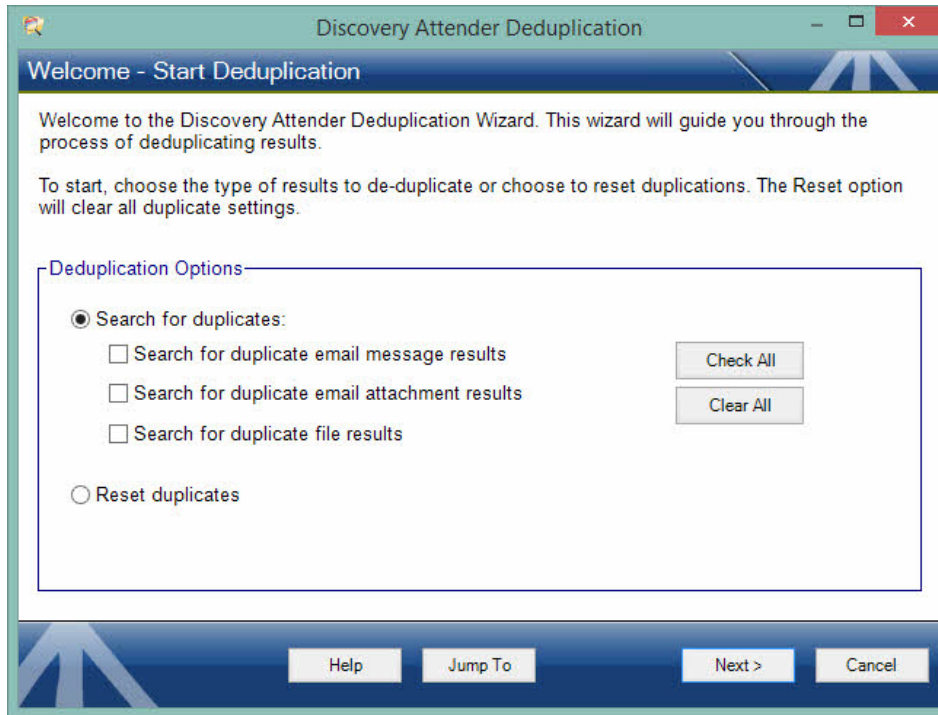
- Deduplication in Discovery Attender is strictly a database exercise, user selected properties are compared against one another and results are marked accordingly. No items are modified or deleted from your result set.
- Regardless of the result view you are currently on, the deduplication process will deduplicate the entire set of results for your chosen types.
- You will not be able to deduplicate more than ~250,000 results at one time. Contact [Technical Support](#) if you have more than this number of results and need to deduplicate.
- If you have a large number of results, please do not try to deduplicate while running actions or a large search.
- To clear your duplicate sets, use the [Reset](#) option.

Click on 'Deduplication' from any of the Action menus to start the Deduplication [wizard](#) to guide you through the process of setting up the deduplication process. Click on the wizard screens in the summary below for more detail.

- Step 1: [Select types of Deduplication](#)
- Step 2: [Select your Criteria](#)
- Step 3: [Validate your criteria](#)
- Step 4: [Processing](#)

Step 1: Select Type of Deduplication

Choose the type of results to de-duplicate. Messages, Attachments and Files The [Reset](#) option will clear all duplicate settings

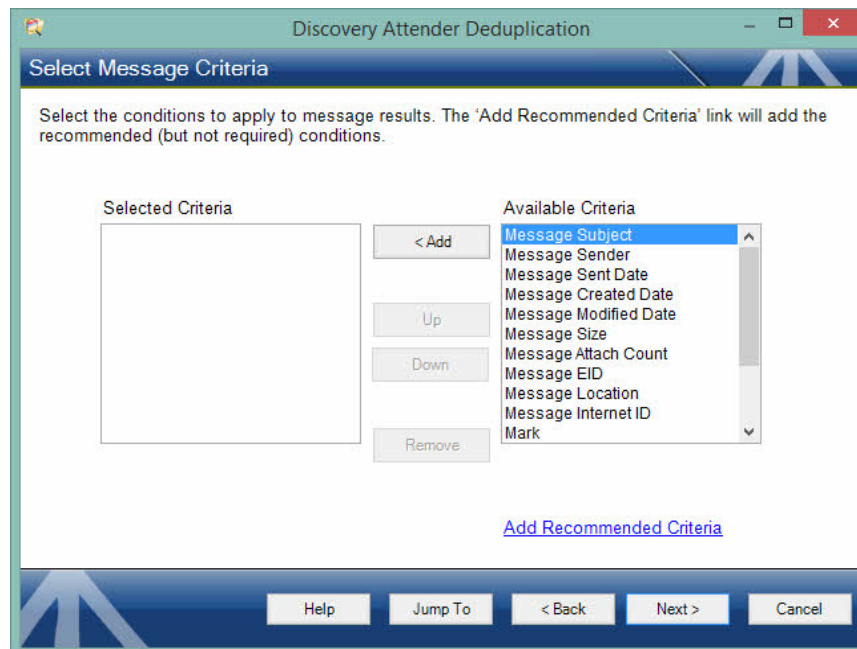


Only items of the selected result type are analyzed and deduplicated.

Step 2: Select Your Criteria

The wizard will progress through the criteria screens for each of the result types you selected. The 'Add Recommended Criteria' link will add the recommended (but not required) conditions. Discovery Attender criteria tends to be very strict. Users are encouraged to sample the different criteria available to gauge the best deduping for their data set. Click 'Next' to continue through the wizard.

Message Criteria

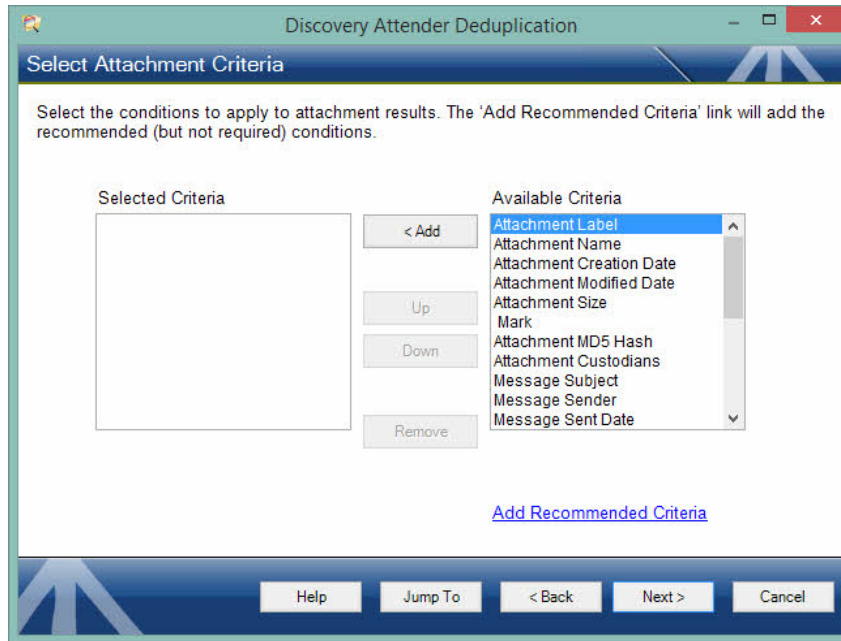


	Description
*Message Subject	Subject line of the message
*Message Sender	Sender of the message
*Message Sent Date	Date the message was sent
Message Created Date	Date the message was created
Message Modified Date	Date the message was last modified
Message Size	Size of the message
Message Attachment Count	Number of attachments in a given message
Message EID	Unique message identifier within a message store (mailbox, public folder or PST). This is only useful if duplicates are from the same store, for example if the sources were from back ups of identical PSTs.
Message Location	Mail Store (Mailbox, PST, etc.) for this message item
Message Internet ID	Unique Internet identifier for external email. Keep in mind that older internal email sent via Exchange servers do not have this field
*Message Unique Hash	A MD5 hash value calculated using the Subject, Sender, Sent Date (to the second level), To, CC, BCC and Attachment count.
MD5 Hash (Plain, RTF, HTML)	Hash values for the message body fields

Please Note:

- Recommended Criteria is noted by an asterisk (*)
- It is not a good idea to select all the message fields as criteria as no duplicates will likely be found. This is because the Message EID field is unique per data store.
- Hash values are only available if hashing was selected as one of the Result Options in the Search Wizard.

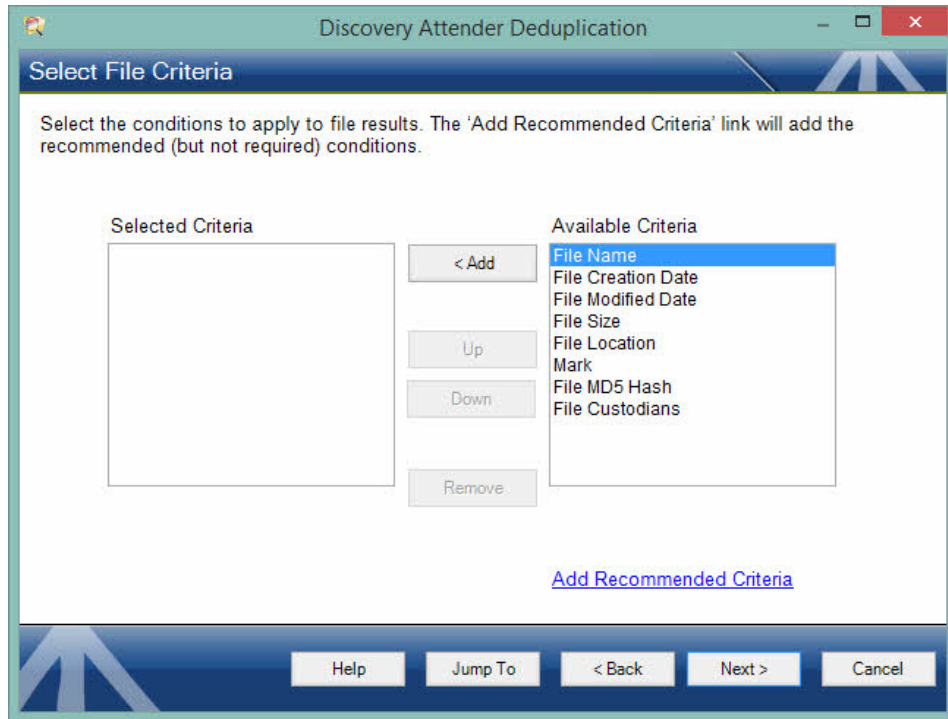
Attachment Criteria



For deduplication purposes, attachments are only compared against other attachments results, not against source messages and not against file results.

	Description
*Attachment Label	Label shown in the message for this attachment
*Attachment Name	Actual name of the attachment. Most often this is the same as the label, but some-time, such as with short cuts, the name and label will differ.
Attachment Creation Date	Date the attachment was created. Please note: some email programs use the date the file was originally created, others use the date it was appended to the message.
Attachment Modified Date	Date the file was last modified (see note above)
*Attachment Size	Size of the attachment
*Attachment MD5 Hash	Hash value for the attachment (if hashed)
Source Message Properties	See Message Criteria above for details.

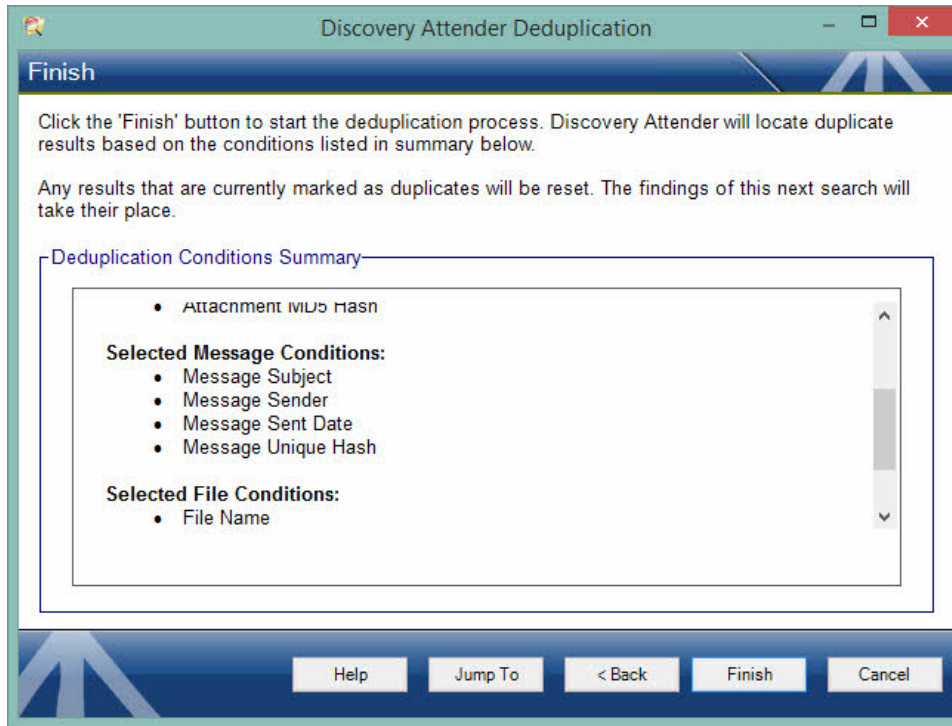
File Criteria



	Description
*File Name	Name of the file
File Creation Date	Date the file was created
*File Modified Date	Date the file was last modified
File Size	Size of the file
File Location	The source path for this file result
*File MD5 Hash	Hash value for the file (if hashed)

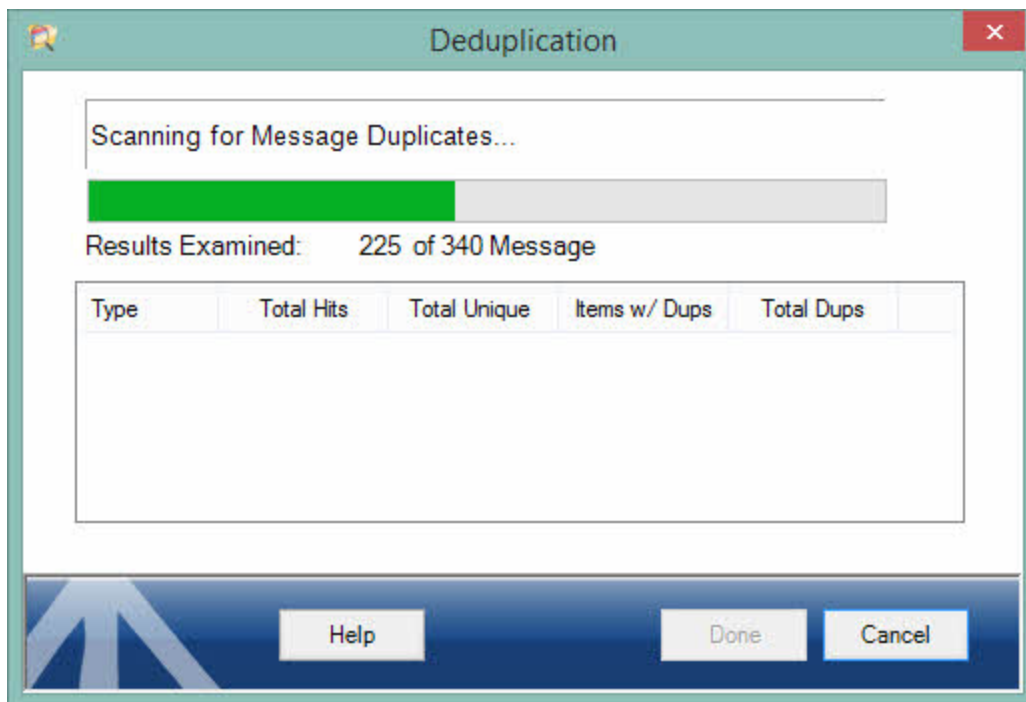
Step 3: Validate Your Criteria

Verify your criteria, then click 'Finish' to start the deduplication process. If you need to change criteria, use the 'Back' or 'Jump To' buttons to select the appropriate wizard page.

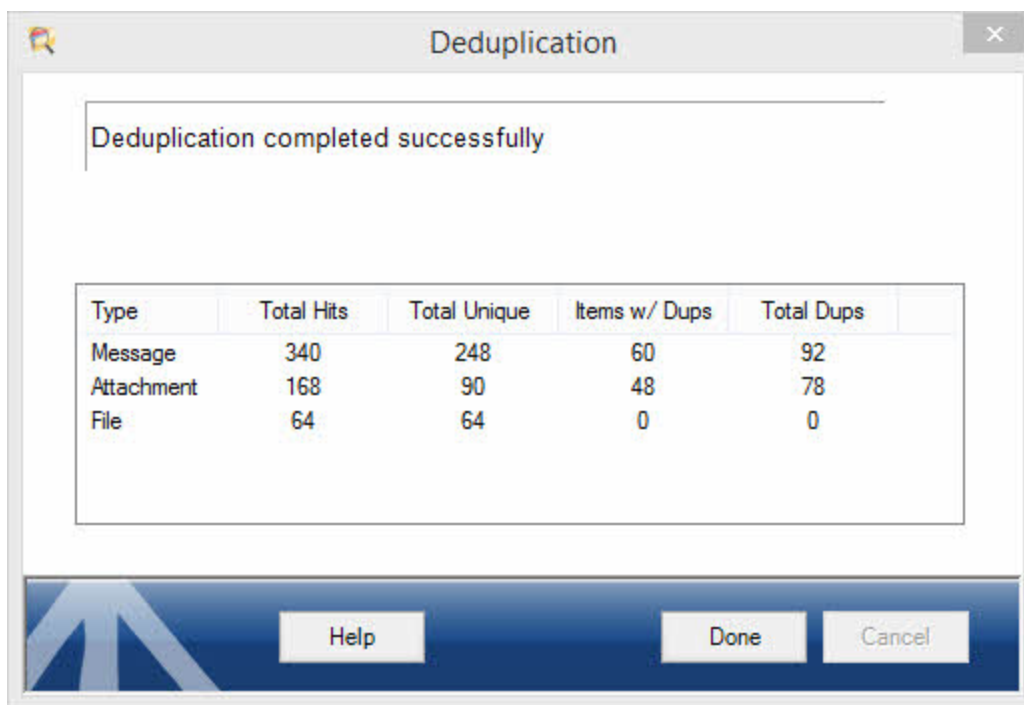


Step 4: Processing

Sit back and watch the progress of the deduplication as the process runs through each of your selected result types: Messages, Attachments, then Files (if all are selected). In the background, the program will compare the result set for items that match the selected criteria. For each unique entry, a new identifier is created and the matching results are marked. This allows Discovery Attender to group the items and select just one as the 'primary' or first instance of a duplicate to view in the Unique Items node.



As each result type completes, a summary is generated. Once the final deduplication is completed, you can use the 'Export to CSV' option to create a csv file of the deduplicate statistics.



	Description
Type	Type of result
Total Hits	Total number of result hits for the selected types
Total Unique	Number of unique items after deduplication
Items w/ Dups	How many items in your unique set of result items have duplicates
Total Dups	Number of items that are duplicates of items accounted for in the unique items.

- The total unique items plus the total duplicates will match the total hits.
- Unique items can have more than one duplicate. Think of one person sending out five emails and all ending up in your result set.
- Many unique items have no duplicates at all.

Step 5: View your Unique Items

Once a deduplication has been completed, a new node called '[Unique Items](#)' will be created. This view will show all the unique items, with none of the duplicates. Click '**DONE**' to open that view.

- To avoid duplicates in your result set, make sure you export from the '[Unique Items](#)' view only.

Resetting Duplicates

A few quick steps will allow you to clear all the duplicate settings from the database. This makes it easier, but is not necessary, to run new deduplication criteria.

Step1 : Open the actions menu

Choose 'Deduplication' to start the Deduplication wizard.

Step 2: Check the Reset Option

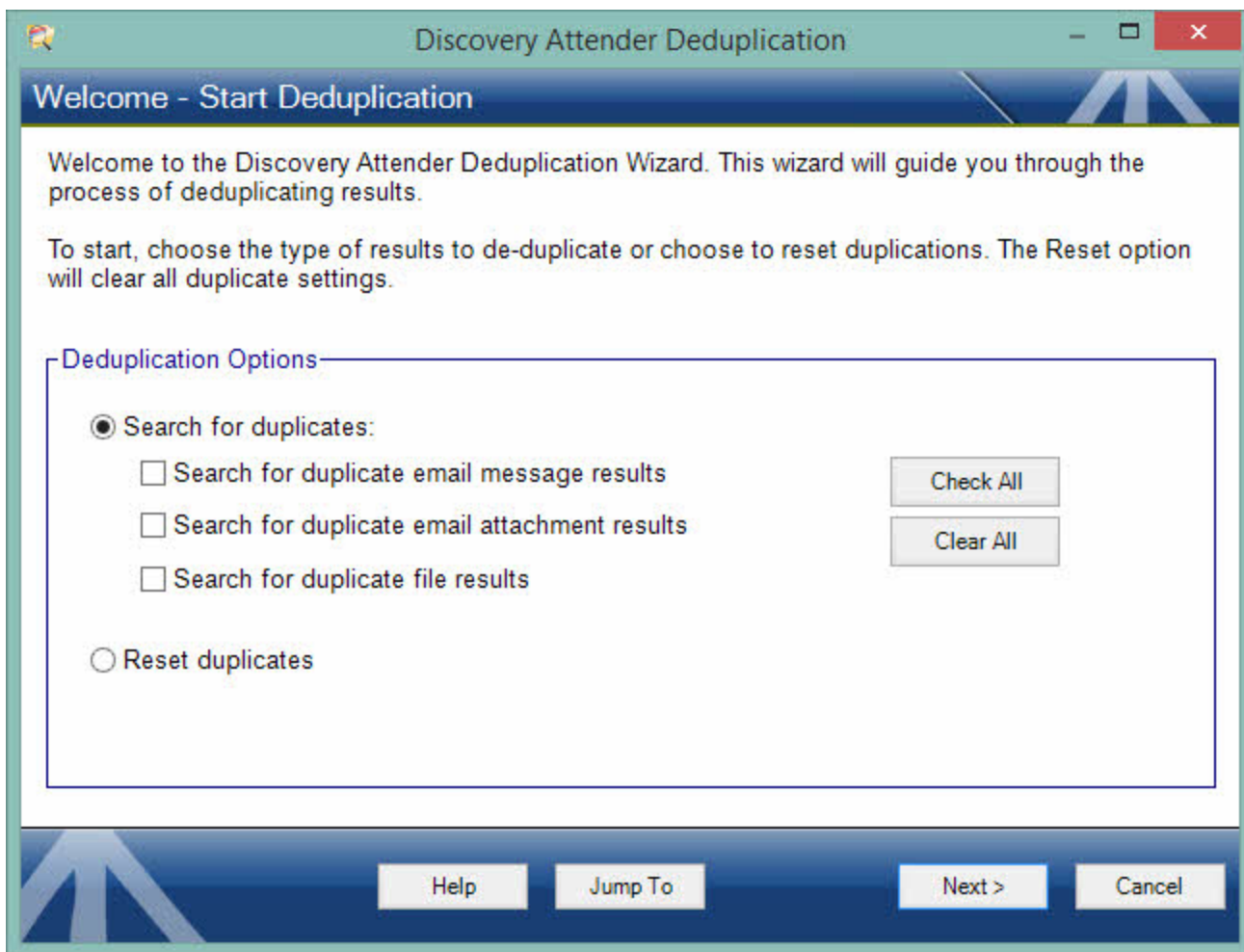
Step 3: Verify your selection, click Finish to start the process

Step 4: Summary

The summary will show the progress of the reset. Once it is complete, you will see the final details. Click 'DONE' to close the wizard. Your Unique Items view will now show the entire result set.

Deduplication Wizard: Welcome

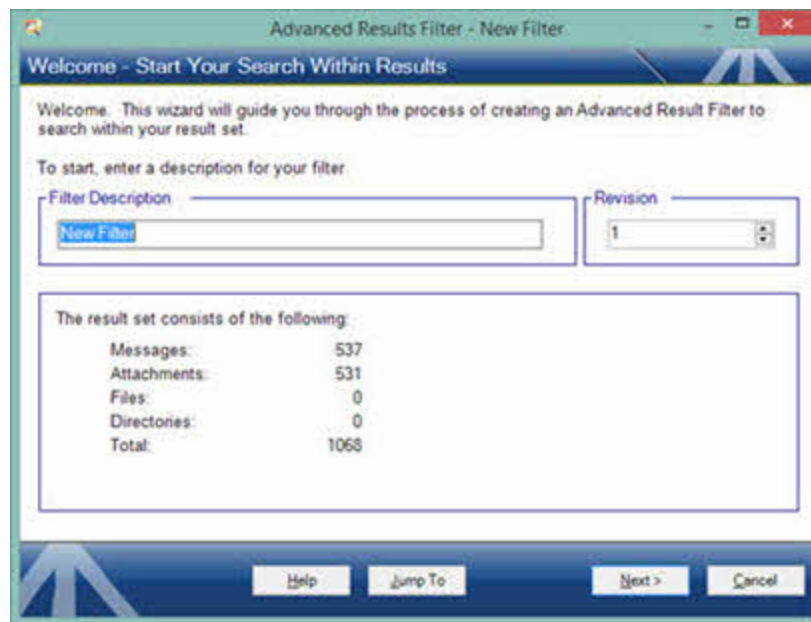
This is the first screen to appear when you start the deduplication wizard from an actions menu. This screen allows you to select the type of deduplication you want to perform.



- If you want to search for duplicate results to create a list of unique items,
 - Select the 'Search for Duplicates' option (the default)
 - Check each type of duplicates (message, attachment, file) you wish to search for duplicates
- To clear all the duplicate settings from the database, select the 'Reset duplicates' option. This makes it easier, but is not necessary, to run new deduplication criteria
- Click 'Next' to continue

Advanced Result Filter Wizard: Welcome

This is the first screen to appear when you start the wizard for the Advanced Result Filter. It is used to describe the advanced result filter. Click 'Next' to [select the criteria](#) for your filter.



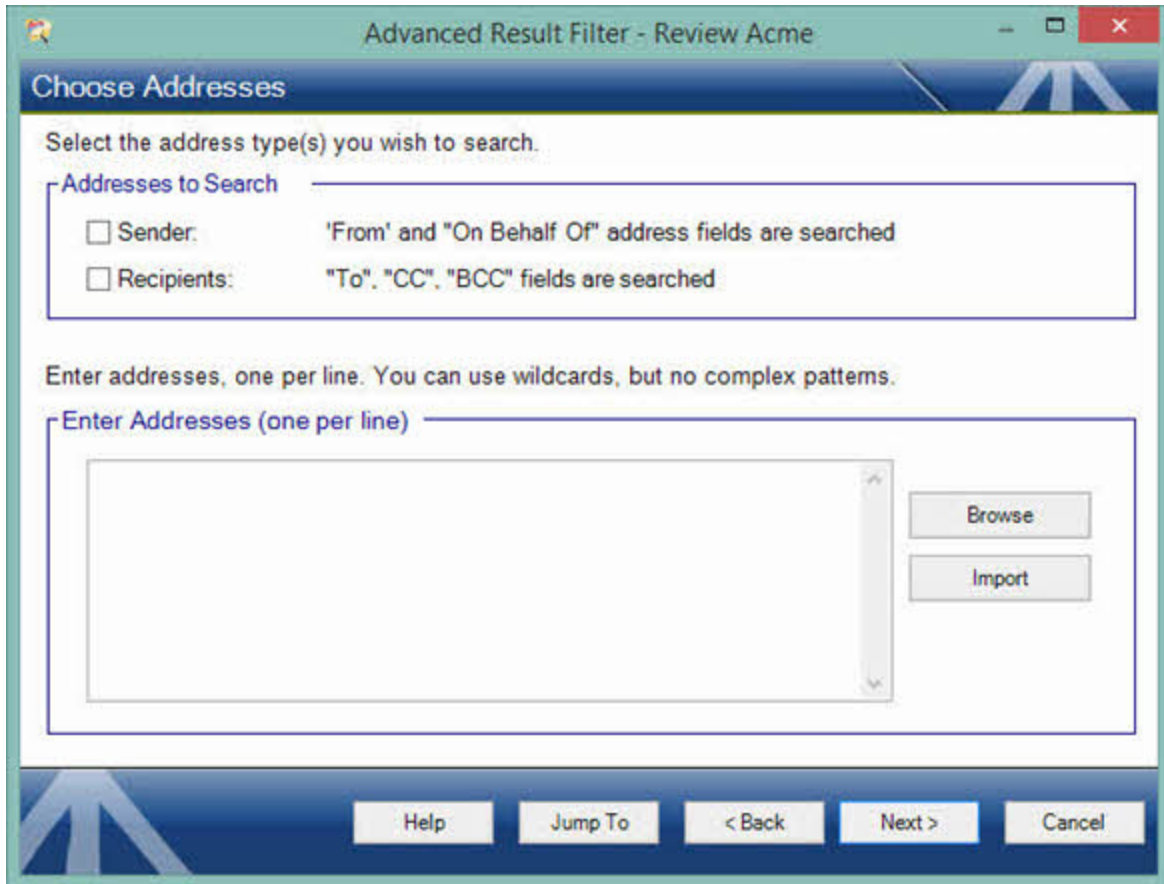
Filter Description	Title for the filter. This name will appear in all lists, so it is a good idea to create a name that will uniquely identify and describe this filter.
Revision	Incremented number to distinguish filters with the same title
Summary	This area shows you the number of hits that are in your search for your reference.

See Also

- [Advanced Filter Setup](#)

Advanced Result Filter Wizard: Choose Addresses

Use Address criteria to filter for addresses in messages and attachments. This screen will only appear if the 'Address' criteria was chosen on the [Select Criteria](#) screen.



- The address filter uses properties stored in the detail database as the source of its information. To work properly, Address Details must have been saved as part of the search. This option is on by default and is available in the Settings screen.
- This criteria can only be used for message and attachment results.
- The **Display Name** and **Address** of each message address property compared against the criteria entered here.

Step 1	<p>Select the Addresses type you wish to search in the '<i>Addresses to Search</i>' section.</p> <ul style="list-style-type: none"> • Sender will search the 'From' and "On Behalf Of" address fields, • Recipients will find items in the "To", "CC", "BCC" fields.
Step 2	<p>Enter your address criteria, one per line.</p> <ul style="list-style-type: none"> • You can use wildcards, but not complex patterns (Near, Like, RegEx, Boolean). • It is always a good idea to use the '*' wildcard when searching addresses.
Step 3	<p>Click on 'NEXT' to advance the wizard</p>

See Also

- [Advanced Filter Setup](#)
- [Global Address List](#)

Advanced Result Filter Wizard: Choose Date Criteria

Use Date criteria to filter for addresses in messages and attachments. This screen will only appear if the '**Dates**' criteria was chosen on the [Select Criteria](#) screen. This criteria can be used for any type of result, however, the **Sent** and **Received** dates can only be used if Messages or Attachments were searched. The filter will use properties stored in the main database for its information source.

The screenshot shows a Windows-style dialog box titled "Advanced Result Filter - Review Acme". The main heading is "Choose Date Criteria". Below the heading, there is a text instruction: "Select the types of dates you wish to use. At least one date type must be selected." This is followed by a section titled "Match Any of the Following Dates" which contains four checkboxes: "Creation" (unchecked), "Modification" (unchecked), "Sent" (checked), and "Received" (checked). Below this is another text instruction: "Enter a date range. The range is inclusive and the dates start at midnight." This is followed by a section titled "Choose the Date Range" with three radio button options: "After" (unchecked), "Between" (checked), and "Before" (unchecked). The "Between" option is selected, and it is flanked by two date input fields. The first field contains "1/ 1/2000" and the second contains "3/ 1/2017", with the word "And" centered between them. At the bottom of the dialog, there are five buttons: "Help", "Jump To", "< Back", "Next >", and "Cancel".

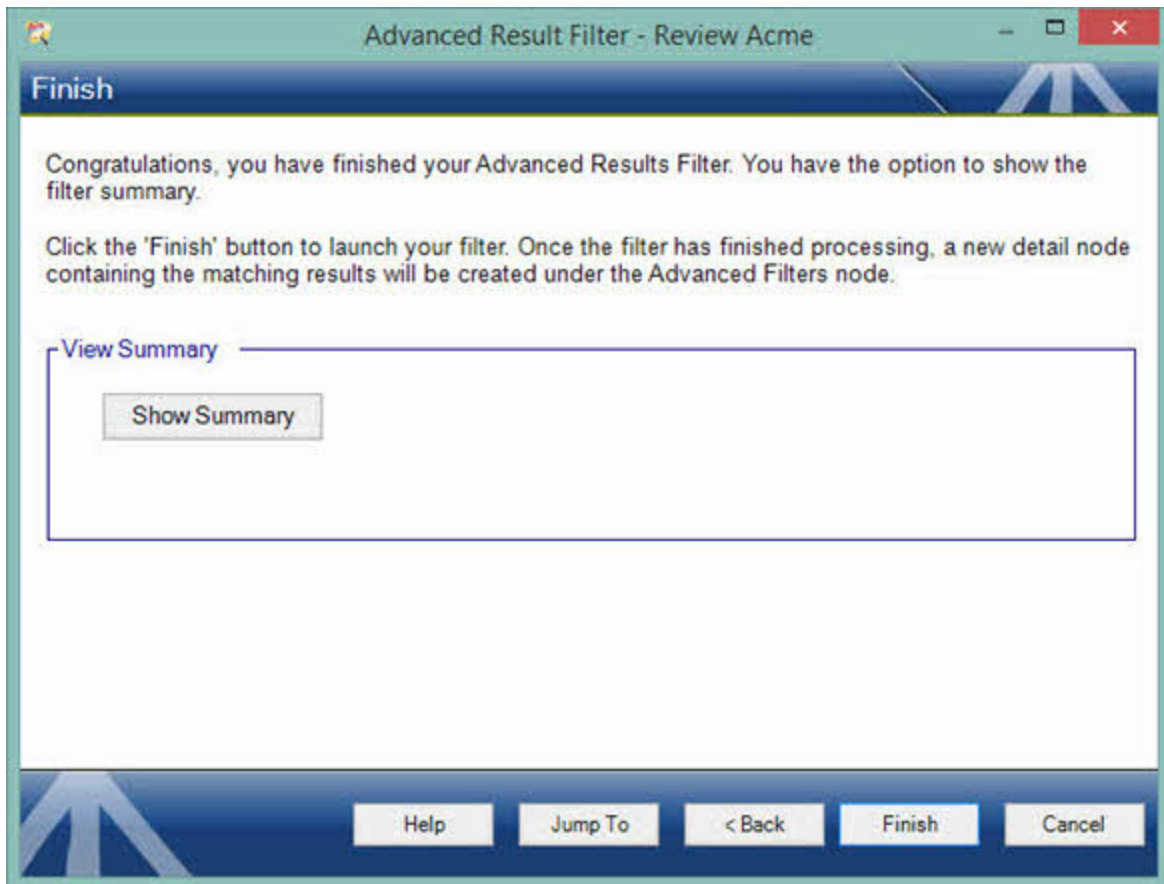
Step 1	Select the types of dates you wish to use under the " <i>Match Any of the Following Dates</i> " section. At least one date type must be selected, or else the filter will error when it is applied. Please Note: Sent and Received Dates apply to email results only.
Step 2	Set the range in the " <i>Choose the Date Range</i> " section. The range is inclusive and the dates start at midnight.
Step 3	Click on 'Next' to advance the wizard

See Also

- [Advanced Filter Setup](#)

Advanced Result Filter Wizard: Finish

This is the last wizard screen to appear when you create a new Advanced Result Filter. From this screen you will complete the filter by clicking 'Finish'.



Use the '**SHOW SUMMARY**' button to view a summary of the filter you have created. If you need to change any criteria, simply click **JUMP TO** and choose the screen.

Once you have set up the filter to your satisfaction, click the '**FINISH**' button. The wizard will close and a new node will be created under '**ADVANCED FILTERS**' with a listing of your results. This may take a few minutes if you have a large result set.

If you have there are no matches to this filter, a message will be displayed in the status bar.

See Also

- [Advanced Filter Setup](#)

Advanced Result Filter Wizard: Choose Keywords (Indexed)

Advanced Result Filters can use **Keyword** criteria only if the results were [indexed](#) as part of the search. This result index is a collection of keywords from each result arranged for quick and efficient searching. Please note: Searching an index requires different syntax than the Search Wizard. See [Filter Expression Syntax](#) for detail.

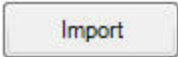
The screenshot shows a dialog box titled "Advanced Result Filter - Review Acme" with a sub-header "Choose Index Keywords". The main text reads: "Enter the keywords you wish to search based on the option selected. Choose an Option to select the evaluation method for the keyword filter. 'Any on List' and 'All on List' expect a list of words, one per line. If using the 'Expression' option, enter the entire expression without line breaks." Below this is a "Keyword List (one per line)" section with a large text area and an "Import" button. To the right is an "Option" section with three radio buttons: "Any on List" (selected), "All on List", and "Expression". At the bottom of the dialog are buttons for "Help", "Jump To", "< Back", "Next >", and "Cancel". A note at the bottom left of the text area says "Wildcards are permitted."

- Index searching uses different syntax from a search created with the Search Wizard. Filter Expressions give you the options to use [Boolean](#) operators or [Proximity](#) searches.
- In filter expression syntax, Boolean operators (AND, OR, NOT) are used to distinguish a relationship between the keywords. Please see the Boolean operator portion of Search Term Clarification for more detail.
- Proximity searches are available in your filter expression, however, the syntax is different from the main search. The format for the filter expression is **WordA w/# WordB** where **#** represents the number words between your first and last word.
- Another helpful option is **xfirstword** and **xlastword** which refer to a number of words between your keyword and the beginning or end of a document. The format is **Keyword w/# xfirstword**.
- If you are using multiple proximity operators in an search expression, be sure to put them in prentices, e.g. [\(sherpa w/2 software\) OR \(discovery w/2 Attender\)](#).

Step 1

Choose an **Option** to select the evaluation method for the keyword filter.

- **Any on List** evaluates the criteria as a list of words. If a match is found against any keyword on the list, it will be returned as part of the filtered set.

	<ul style="list-style-type: none"> • <i>All on List</i> also evaluates a list of words. In order to be returned as part of the filter set, each and every keyword in this list must match. This is equivalent to using the AND conjunction to join the keywords in the list. • <i>Expression</i> expects an advanced filter expression based on special syntax. See below for syntax details. This is the default for new filters.
Step 2	<p>Enter the keywords you wish to search based on the option selected. <i>Any on List</i> and <i>All on List</i> expect a list of words, one per line.</p> <p>If using an advanced filter <i>Expression</i> option, enter the entire expression without line breaks . The text will wrap around the control.</p>
Step 3	Click on 'Next' to advance the wizard.
	Allows user to select a file from which to import a set of keyword criteria into the text box.

Please Note

- Indexes do not include so called noise words such as 'the', 'a', 'or', 'and', or 'if'.
- Punctuation is not included in this index. Do not include punctuation such as periods, hyphens, commas, quotes etc. as part of your keyword criteria.
- Messages and attachments are indexed together. All source messages for attachments hits will be included in the index. Likewise, all attachments will be included for any message hit. Furthermore, if both an attachment and a message had hits in the main search, the message result will be returned as a filter hit, even if the filter keyword matched in the attachment.
- The index is created using the dtSearch indexing engine. If you wish, you can use dtSearch syntax as part of your search expression, or even use dtSearch Desktop to search your index with more advanced functionality.
- To find your index location, right-click on the search in the [Main Console](#). Navigate to the [Debug Menu](#), and select *Search Directory* to open the folders for the selected search. If a search has been indexed, there will be a folder called '***Index***'.

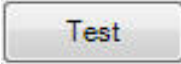
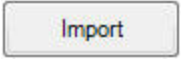
See Also

- [Advanced Filter Setup](#)

Advanced Result Filter Wizard: Choose Keywords for Properties

Search selected database properties for keywords.

<p>Step 1</p>	<p>Choose the properties you wish to search.</p> <p>Message Subject: This is the subject of a message that is stored for all message and attachment results.</p> <p>File Name: This is the name of the file for all attachment and file results.</p> <p>Message Type: The message class which is stored for all message and attachment results.</p> <p>File Properties: Items must match one of the properties collected for file or attachment results. These properties vary by file type and accessibility. To collect these properties successfully, the Collect Document Properties option must have been enabled for this search.</p>
<p>Step 2</p>	<p>Enter the text into the Keyword List. All Keyword options can be used here, but this functionality is comparing against the database fields for each of these properties.</p> <p>Please note: Be sure to use the tester to validate your criteria.</p>
<p>Step 3</p>	<p>Select the evaluation options:</p> <p>Any on the list: Parses the text box as a list of words or phrases, one per line. If any of these words or phrases can match, then the result is included in the filter.</p> <p>All on the list: Parses the text box as a list of words or phrases, one per line. All of these words or phrases <i>must</i> match to include the result in the filter.</p>

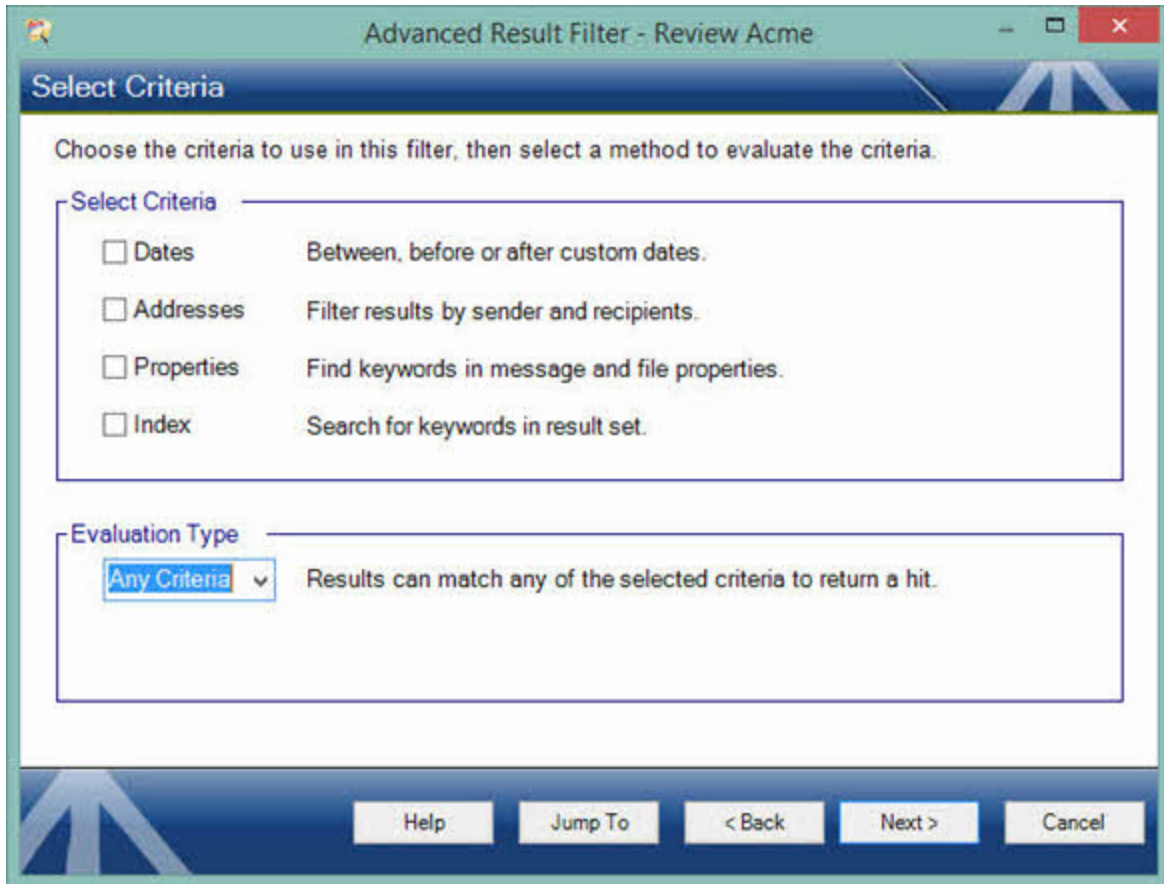
	<p>Expression: The entire text box is used as the search expression and must be syntactically correct to continue. Only if the properties match the expression will the item be a hit.</p> <p>Please note: For the All on list and the Expression options - at least one individual field must match the entire listed criteria. The fields are not compared as an aggregate.</p>
Step 4	Click on ' NEXT ' to advance the wizard.
	Tests the text box and options using the Keyword Tester .
	Imports the keyword list from a file and inserts it into the text box.

See Also

- [Advanced Filter Setup](#)

Advanced Result Filter Wizard: Select Criteria

This screen allows you to select the criteria that you will use in your filter.



Select the criteria you'd like to include in this filter, then select the evaluation type. Click '**NEXT**' to proceed to the first criteria page.

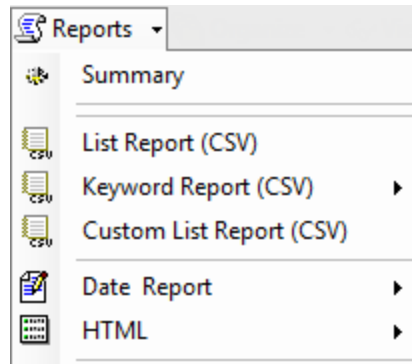
Dates	Uses date criteria to filter result set.
Addresses	Uses message address to find results. Please Note: this criteria can only be used if address details were collected for the search. These details are collected by default. See Settings for more detail.
Keywords	Uses the index to locate keywords for the filter. Please Note: this criteria will only be enabled if the results were indexed as part of the search.
Evaluation Type	The method to evaluate the criteria. <ul style="list-style-type: none"> • All Criteria means that all the selected criteria will have to match to return a hit. • Any Criteria allows any of the criteria options to match to add it to the filtered list.

See Also

- [Advanced Filter Setup](#)

Reports Summary

Discovery Attender provides a number of built-in reports that can be used to share information.



- The Result Summary view has the most options available for reporting, including all the list reports. Additionally, from almost any result view, you can access the basic Reports [menu](#).
- Create your own customized reports using the back end databases (See [Custom Reporting](#) below for details).
- Use the Export to CSV option to export any of the list views on display in the Results.
- It is best to produce reports after items have been exported so the 'Status' and 'Action Location' fields can be used to provide a complete audit for individual results.

Keep in mind that searches with numerous results will generate large reports that can take some time to create. Discovery Attender will warn you if these reports are over 10 MB. It is recommended that you open large reports outside of Discovery Attender.

Standard Reports

Reports come in two formats, HTML and CSV. The [summary](#), [list report \(HTML\)](#), [detailed](#) and [duplicates](#) reports are all in HTML format.

- HTML reports are best viewed and printed with landscape orientation.
- Except the summary report, expect the HTML reports to get very large. For ease of production, consider one of the CSV reports instead.

Title	Description
Summary	<p>This small, simple report provides a general overview of the search details, including criteria, statistics, location information. Sections include:</p> <p><i>*Search Criteria:</i></p> <ul style="list-style-type: none">• General Description: general information about the search, including name and revision number;• Search Statistics: summarizes details on the number of hits, creation details• Result Types: includes what type of results to include in the result set;• Locations to Search: indicates what to search, including mailboxes and PST files;• Result Options: determination of what to store in the result set;• Criteria Summary: summation of all search conditions.

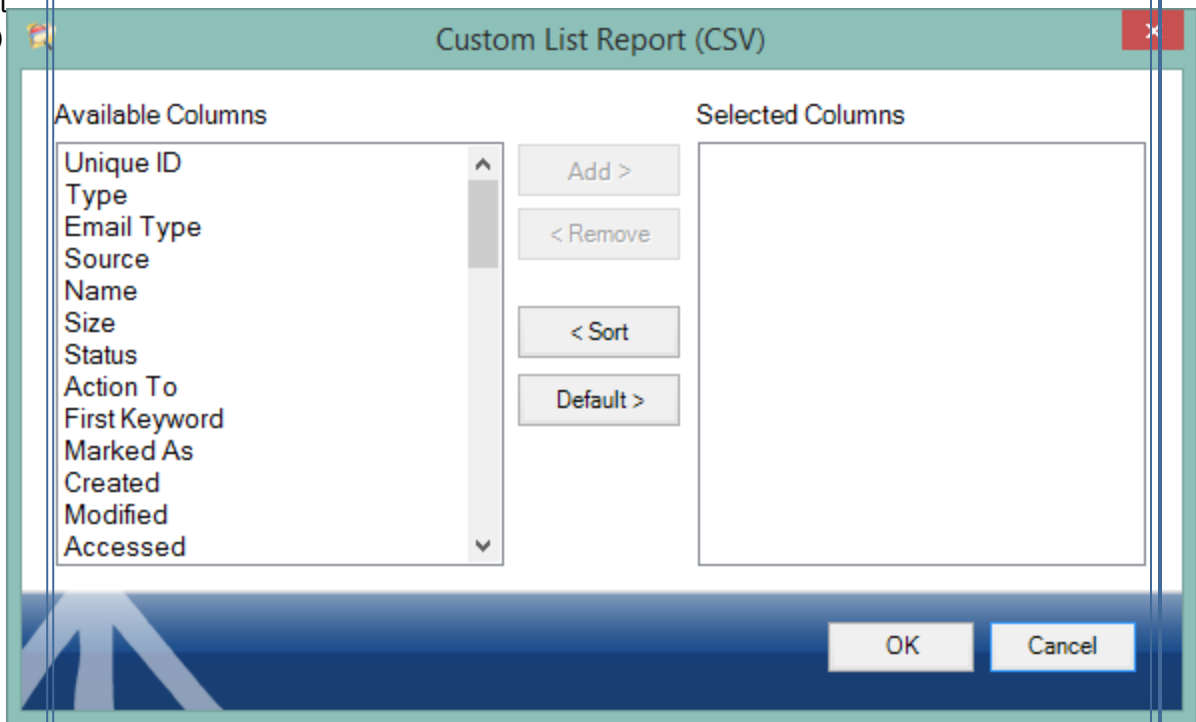
	<p><i>*Criteria Details:</i></p> <ul style="list-style-type: none"> • Keyword Options: options used in keyword searching, along with statistics for individual keywords by leaf, and branch (if used) • Dates: date ranges for files and emails are specified here; • Message Types: indicates what type of Exchange material to search; • Locations to Search: includes mailboxes, PST files, and file locations to be searched for the result set.
--	--

List Report (HTML)	In addition to the summary, this report provides a listing of the basic properties for each result. Please note, a CSV version of this report is available from the Summary screen, which might prove more effective.
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List Report (CSV)	<p>Provides a wide variety of detail for all result types, this report is presented in a list view which can be exported to a CSV file. The resulting CSV file will be considerably smaller than HTML reports, but contains as much data as the detailed report.</p> <p>This report is only available from the Summary screen, but keep in mind that any other Result Management view can be exported to a CSV file.</p>
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Keyword Report (CSV)	<p>Provides a basic list of details, along with a column for each keyword that hit. Users have a choice of Leaf only (recommended), Branch Only, or Both.</p> <p>Like the standard list report (CSV), this report exports to a CSV file that can be opened using any spreadsheet program (e.g. Microsoft Excel)</p>
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Custom List Report (CSV)	This report opens a choice screen that allows the user to choose the fields to include in the report.
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	Select columns from the selection box on the right, then click ' ADD ' to include them in the report. Once all columns are selected, click ' OK ' to create the view. Although any column listed can be selected, please keep in mind that the properties will only be present if that field was
--	--

	populated. A file results, for example, will not have any message details.
Detailed Report	In addition to the summary, this report provides an expanded detail set for each result item. Because of the number of properties included, these reports tend to get very large.
Duplicates Report	This report focuses on the duplicates, listing only the unique item, its properties plus any duplicates found for that item.
Export to CSV	This option creates a CSV file of all data in any selected list view. CSV files can be opened in Microsoft Excel. Please be aware that Excel can only open files with ~65,535 rows or less, so you may need another reader (e.g. MS Access) for particularly large CSV files.

Customized Reports

Discovery Attender back end databases are in .mdb (Microsoft Access) format. These databases are fully accessible via any ODBC compatible tool for customized report writing . If you need more information on how to get detailed reports from the databases, please contact [Sherpa Support](#).

List Report (CSV)

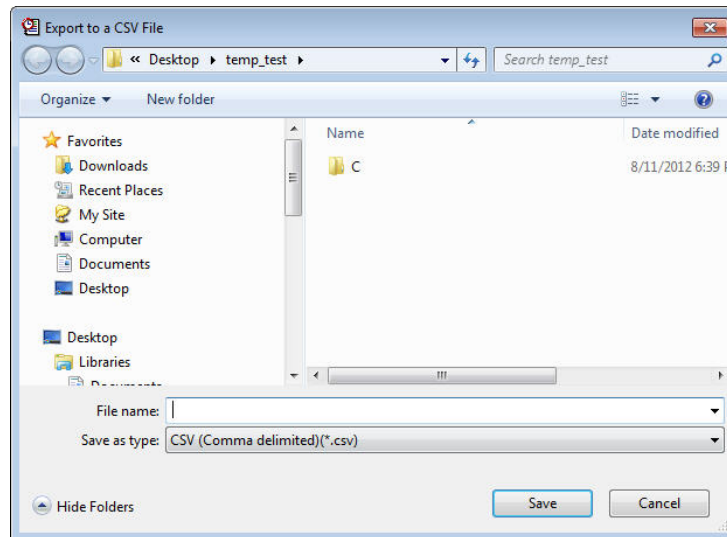
From the [Result Summary](#) screen, you can access a general list report that can be exported to CSV format by selecting the **Reports | List Report (CSV)** option. This report is a listing of all results and includes the commonly requested fields for each result type, including recipients.

Selecting this option will open a dialog box that contains the appropriate details. You can track the progress of the report creation in the status bar. Once populated, right-click to select the 'Export to CSV' option from the context menu of the list view:

Uniqu...	Type	Email ...	Source	Name	Size	Status	Actio...	First K...	Mark...	Created	Modifi...	Acce...	Hash
cbad1...	Mess...	Mailbox	Mailb...	Undel...	3 KB			test: ...		8/31/...	10/26...		
95156...	Mess...	Mailbox	Mailb...	Undel...	3 KB			test: ...		8/31/...	10/26...		
d7931...	Mess...	Mailbox	Mailb...	Undel...	3 KB			test: ...		8/31/...	10/26...		
ba740...	Mess...	Mailbox	Mailb...	RE: [li...	18 KB			test: ...		7/30/...	6/27/...		FF19...
1ce41...	Mess...	Mailbox	Mailb...	Test ...	3 KB			test: ...		8/29/...	8/29/...		F8A7...
b7738...	Mess...	Mailbox	Mailb...	Micro...	9 KB			test: ...		1/30/...	9/14/...		41D8...
6cf689...	Mess...	Mailbox	Mailb...	Micro...	17 KB			test: ...		1/30/...	9/14/...		2708...
978c9...	Mess...	Mailbox	Mailb...	Monit...	18 KB			test: ...		1/16/...	9/14/...		7118...
a61b5...	Mess...	Mailbox	Mailb...	Micro...	17 KB			test: ...		1/16/...	9/14/...		2708...
b4ca7...	Mess...	Mailbox	Mailb...	Test ...	3 KB			te		8/29/...			F38A...
ddb25...	Mess...	Mailbox	Mailb...	How t...	18 KB			te		6/3/2...	6/3/2...		9039...
0917a...	Mess...	Mailbox	Mailb...	Rese...	19 KB			test: ...		6/3/2...	6/3/2...		4157...
fd5fd6...	Mess...	Mailbox	Mailb...	VoIP ...	20 KB			test: l...		6/3/2...	6/3/2...		2436...
ff4c82...	Mess...	Mailbox	Mailb...	Toda...	20 KB			test: ...		6/3/2...	6/3/2...		E489...

3466 Results Listed

Choose the destination folder and CSV file name, then click '**SAVE**' to create the report:

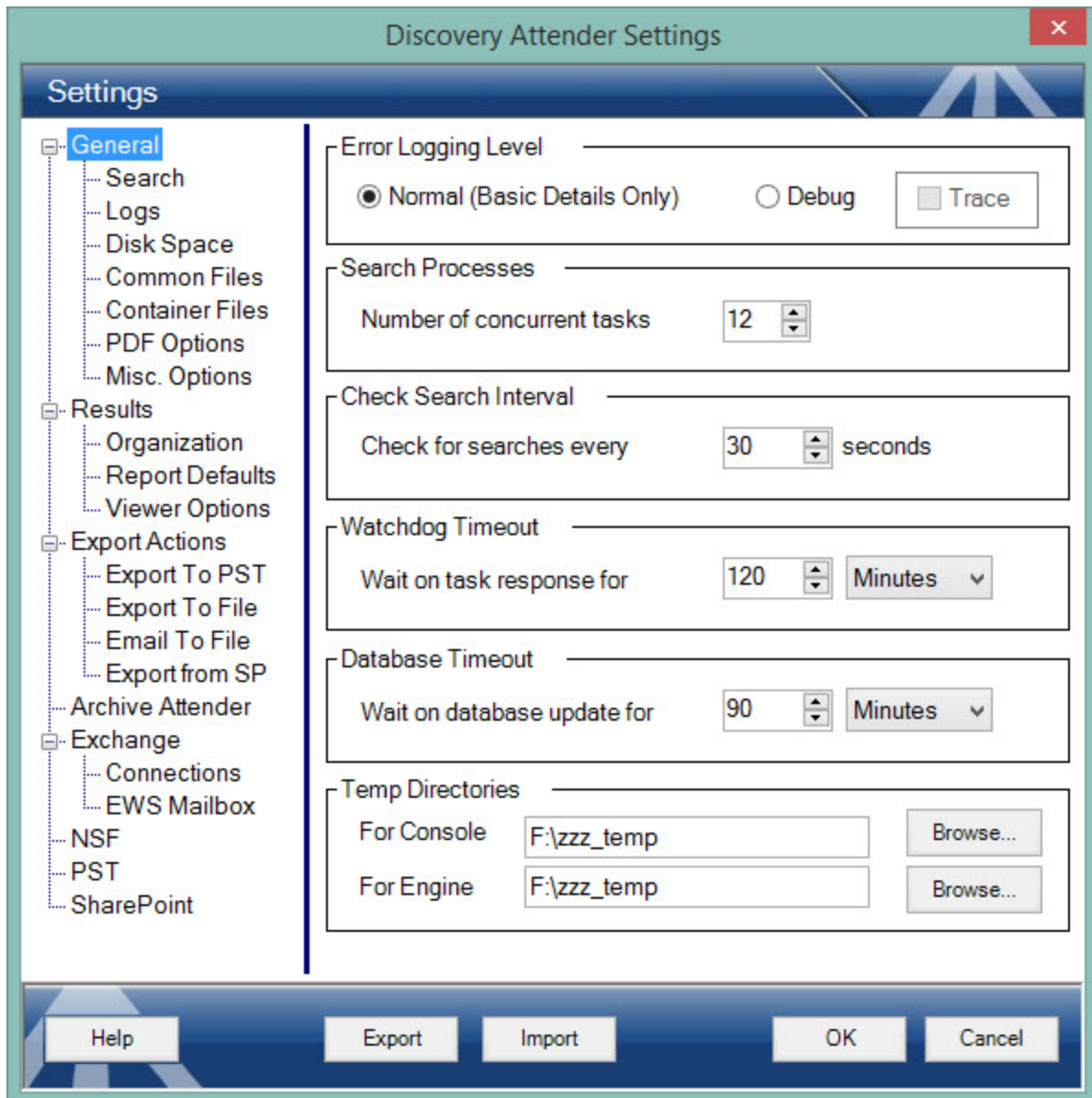


The formatting of this report is minimal. Users can customize the appearance in Microsoft Excel, or any other spreadsheet program, provided the number of results fall under any row limitations.

This report is significantly smaller than the equivalent HTML list reports, however, it does not contain summary information. If using this report for production purposes, it is a good idea to save it in conjunction with the HTML Summary report.

Discovery Attender Settings

Default options for the entire application - including all subsequent projects, searches and result actions - can be customized in this *SETTINGS* screen.



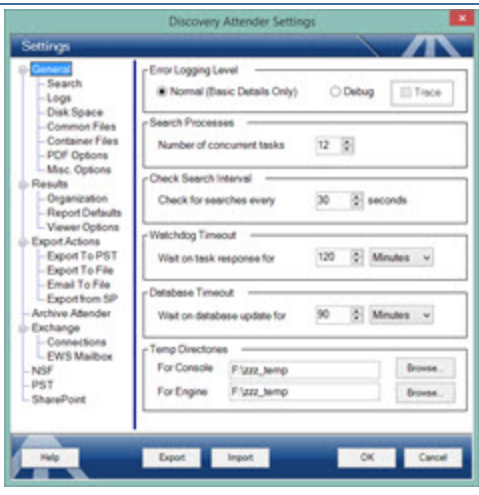
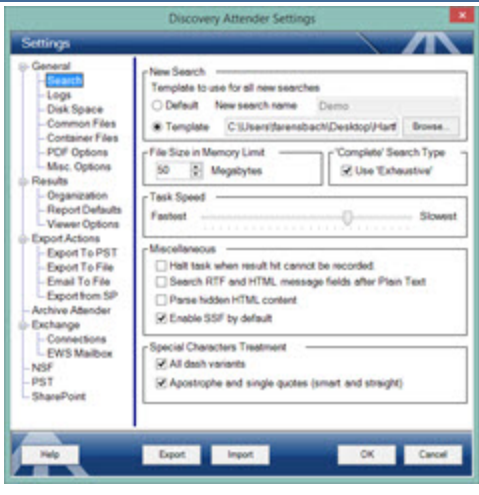
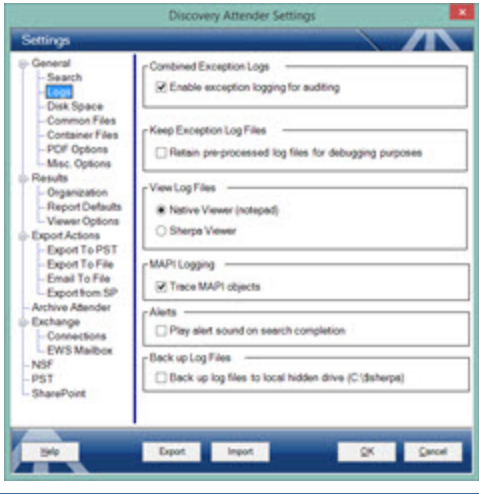
This screen can be reached from the [Main Console](#) by selecting *Settings* from the application menu.

Please Note:

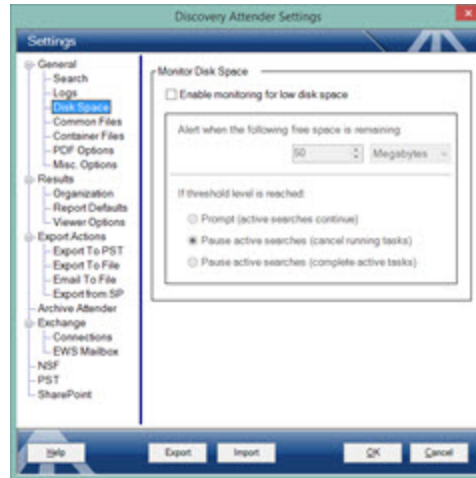
- Currently running searches and actions will follow the options that were set at the time those searches or actions were started.
- The **EXPORT** button will export the settings to an XML formatted file. Make sure the settings have been saved by clicking the **OK** button. Exporting settings is very helpful for maintaining the application options from one installation to another.
- The **IMPORT** button will accept an XML file which contains all the application option settings created by using the **EXPORT** button.
- Clicking **OK** will save all the values which were changed on any of the sections. The user will not be prompted.
- Clicking **CANCEL** will disregard any adjustments made to the Settings, no changes will be saved.

Settings Node Options

Select the node listed below for more detail about each screen:

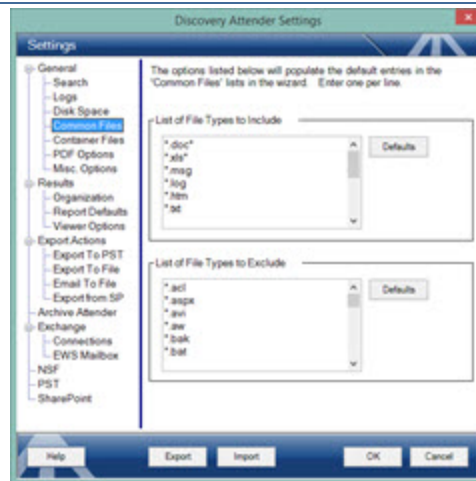
<p>General</p>	 <p>The screenshot shows the 'Discovery Attender Settings' dialog box with the 'General' tab selected. The left sidebar lists various settings categories. The main area contains: Error Logging Level (Normal selected, Debug and Trace unselected); Search Processes (Number of concurrent tasks: 12); Check Search Interval (Check for searches every: 30 seconds); Watchdog Timeout (Wait on task response for: 120 Minutes); Database Timeout (Wait on database update for: 90 Minutes); Temp Directories (For Console: F:\zzz_temp, For Engine: F:\zzz_temp).</p>	<p>Overall application and search options including logging level, concurrent number of tasks, and timeouts.</p>
<p>Search</p>	 <p>The screenshot shows the 'Discovery Attender Settings' dialog box with the 'Search' tab selected. The main area contains: New Search (Template selected, File Size in Memory Limit: 50 Megabytes, Complete Search Type: Exhaustive); Task Speed (slider between Fastest and Slowest); Miscellaneous (Enable SSI by default checked); Special Characters Treatment (All dash variants and Apostrophe and single quotes checked).</p>	<p>Options for search engine related settings.</p>
<p>Logs</p>	 <p>The screenshot shows the 'Discovery Attender Settings' dialog box with the 'Logs' tab selected. The main area contains: Combined Exception Logs (Enable exception logging for auditing checked); Keep Exception Log Files (Retain pre-processed log files for debugging purposes unselected); View Log Files (Native Viewer selected); MAPI Logging (Trace MAPI objects checked); Alerts (Play alert sound on search completion unselected); Back up Log Files (Back up log files to local hidden drive (C:\\$herpe) unselected).</p>	<p>Defaults for log files and exception logging.</p>

Disk Space



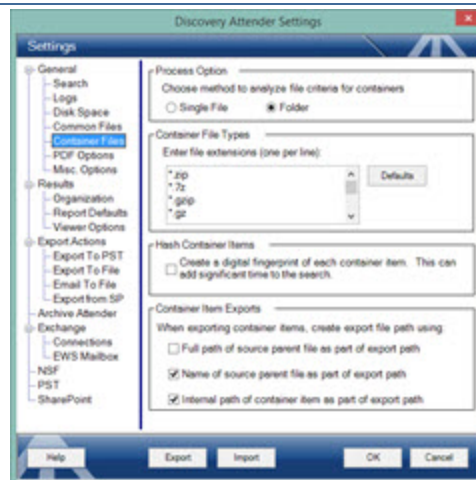
Options for monitoring and alerting users when space runs low on the local disks.

Common Files



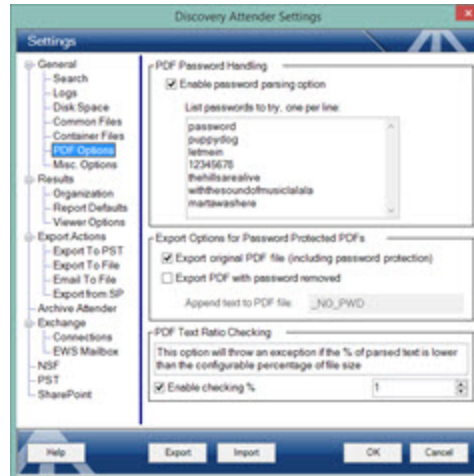
Management of common file types for populating [common file defaults](#) in the search wizard.

Container Files



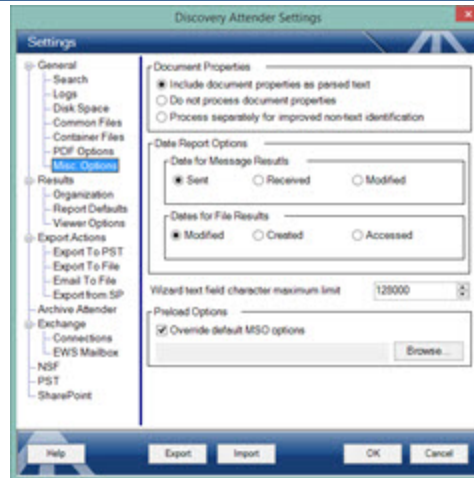
Options for dealing with compressed container files such as zips, tars and rars.

PDF Options



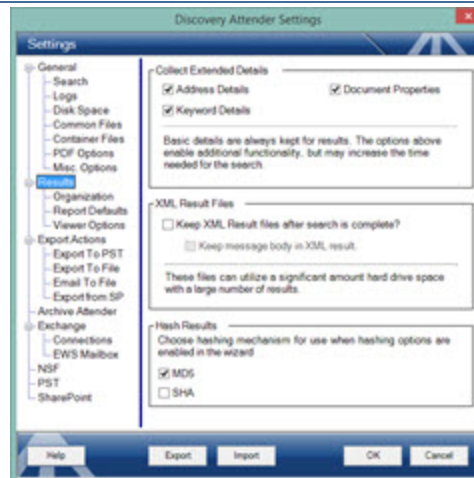
Functionality for handling passwords in PDF files. This includes PDF files that are encrypted with no password.

Miscellaneous Options



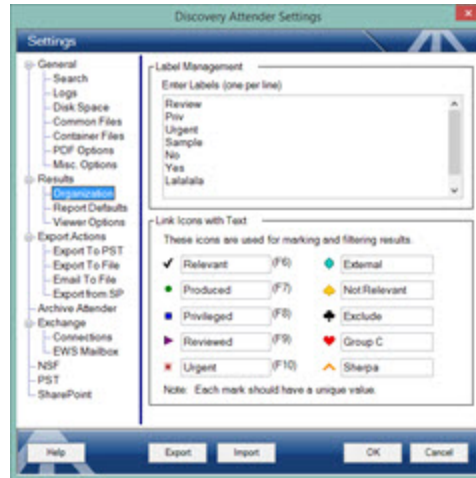
Options for handling text properties.

Results



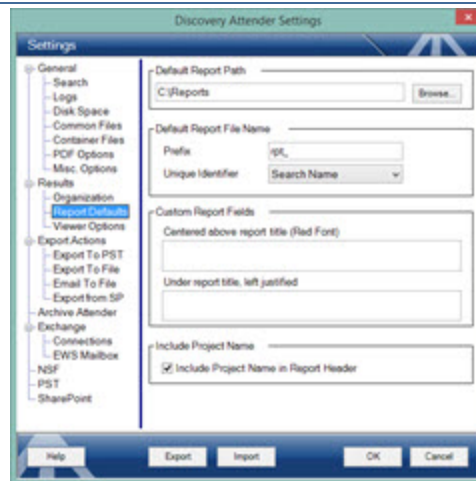
Selections for collecting results details.

[Organization](#)



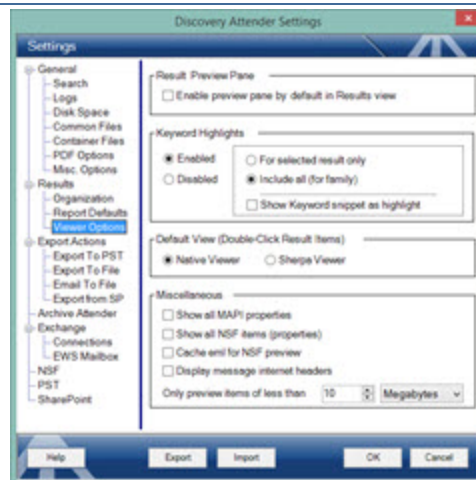
Manage organizational features such as [Labels](#) and [Marks](#). (Formerly titled 'View Options').

[Report Defaults](#)



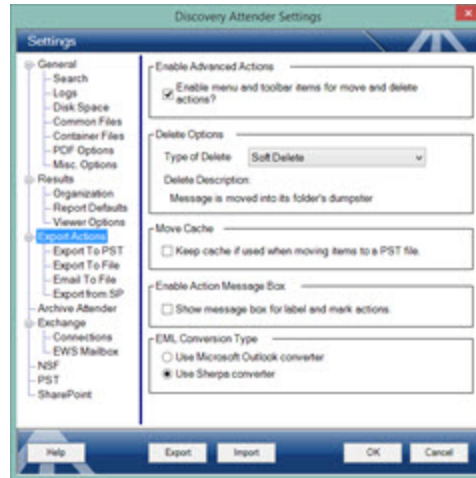
Settings related to the creation and saving of reports.

[Viewer Options](#)



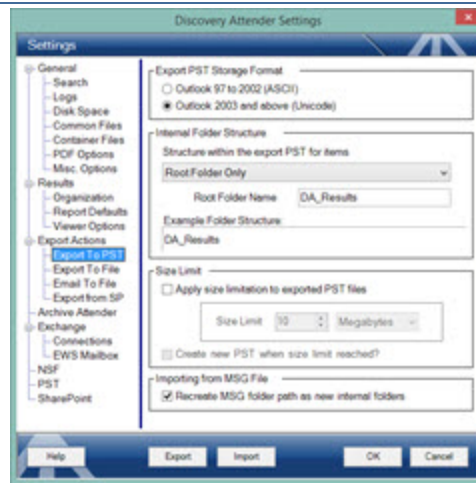
Options for the preview pane and text search viewer.

[Export Actions](#)



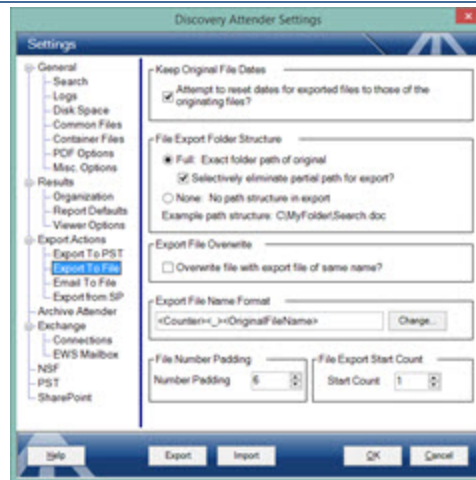
Default values for export actions including the display of advanced actions and message box.

[Export To PST](#)



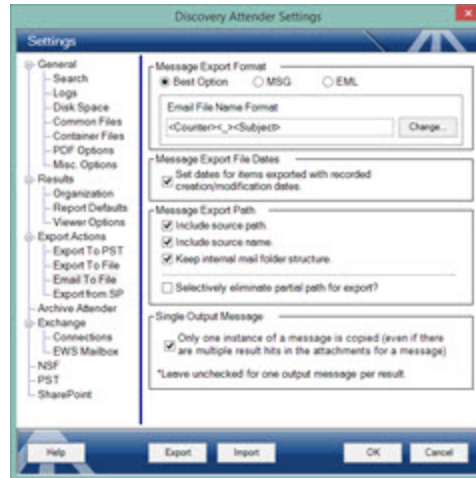
Settings related to the export of results to PST files. This includes the size and internal folder structure of the export PSTs.

[Export To File](#)



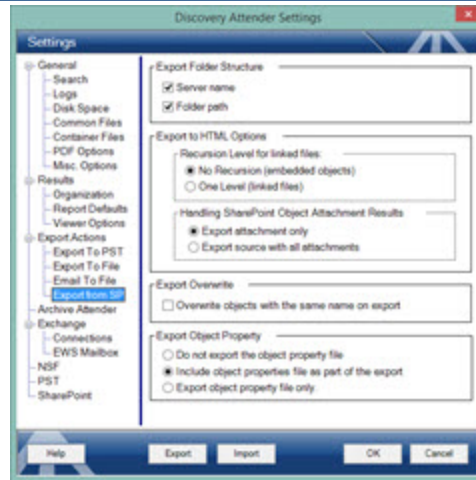
Options related to the export of individual files including path, date and name settings.

[Email to File](#)



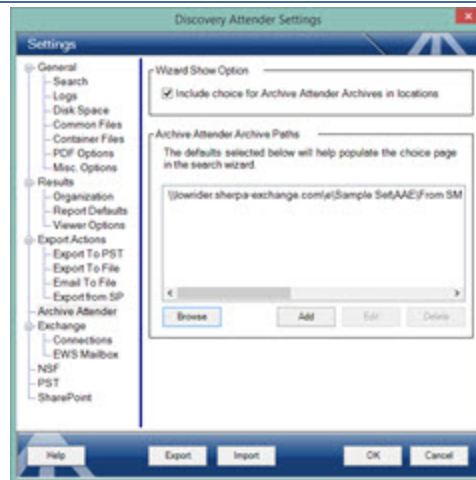
Settings related to email when exported to individual files.

[Export From SP](#)



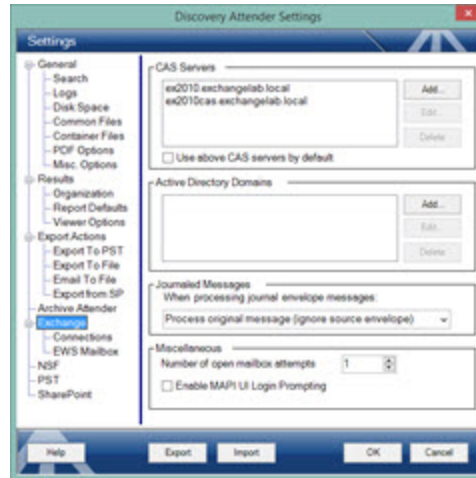
Options for exporting files from a SharePoint server.

[Archive Attender](#)



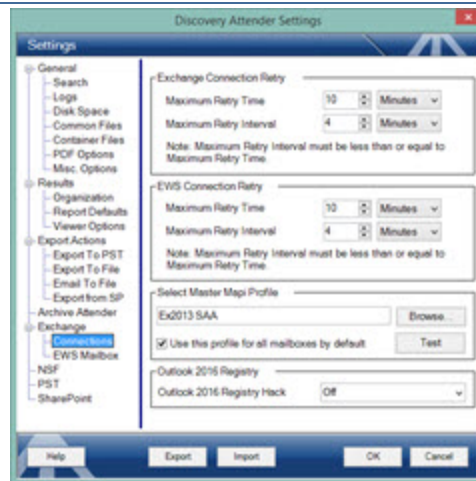
Default options for searching Sherpa Software's Archive Attender archives

Exchange



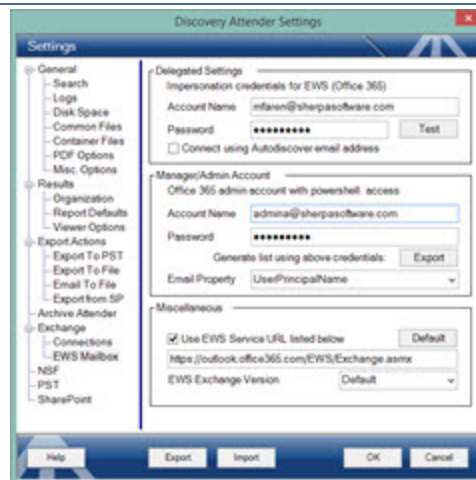
Default options for searching Microsoft Exchange Servers.

Connections



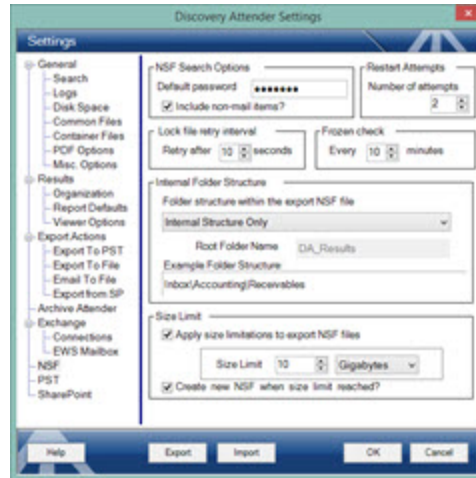
Default options for reestablishing lost network connections to Exchange servers.

EWS Mailbox



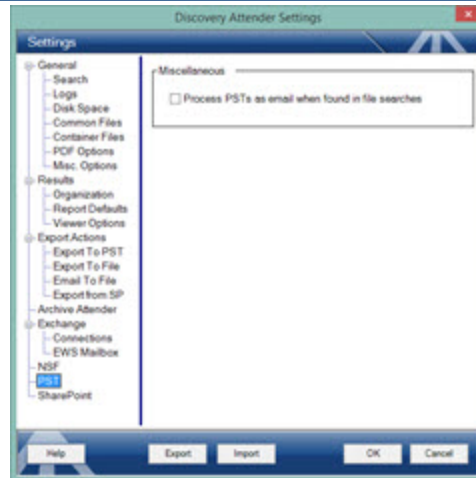
These settings control the options for the various EWS searching which includes Office 365.

[NSF](#)



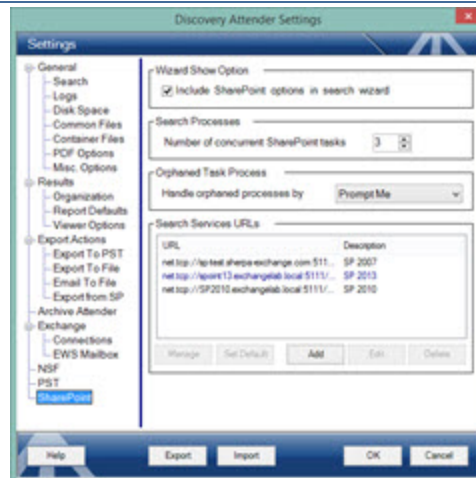
Default options for searching Lotus Notes NSF files.

[PST](#)



Default options for searching PST files.

[SharePoint](#)



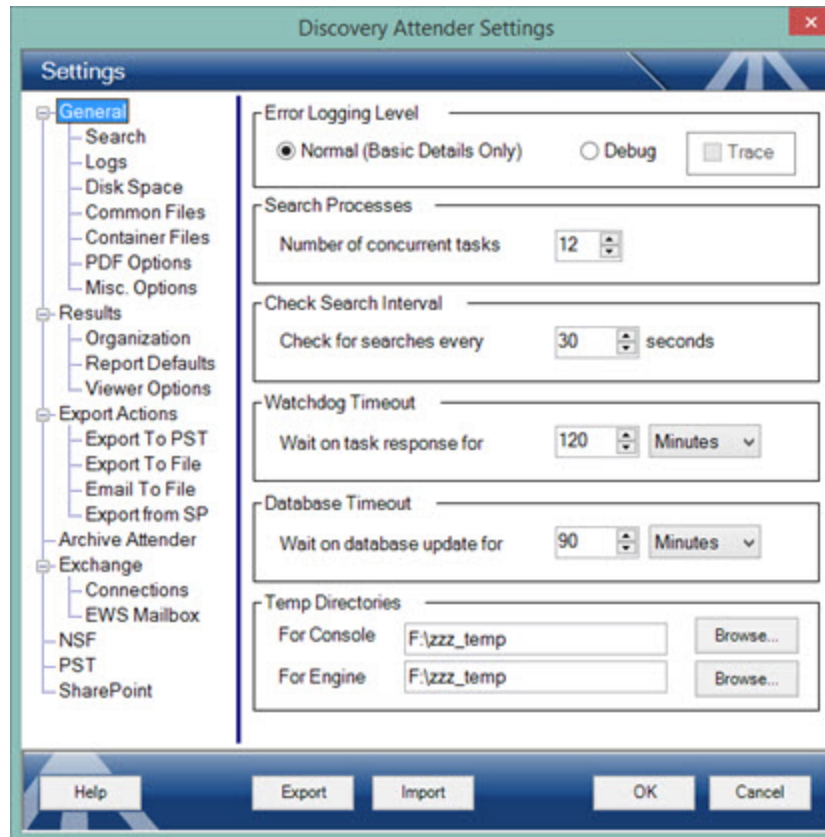
Default options for connecting to and searching Microsoft SharePoint servers.

See Also

- [Main Console](#)

Settings: General

Several overall program options are provided on this page.

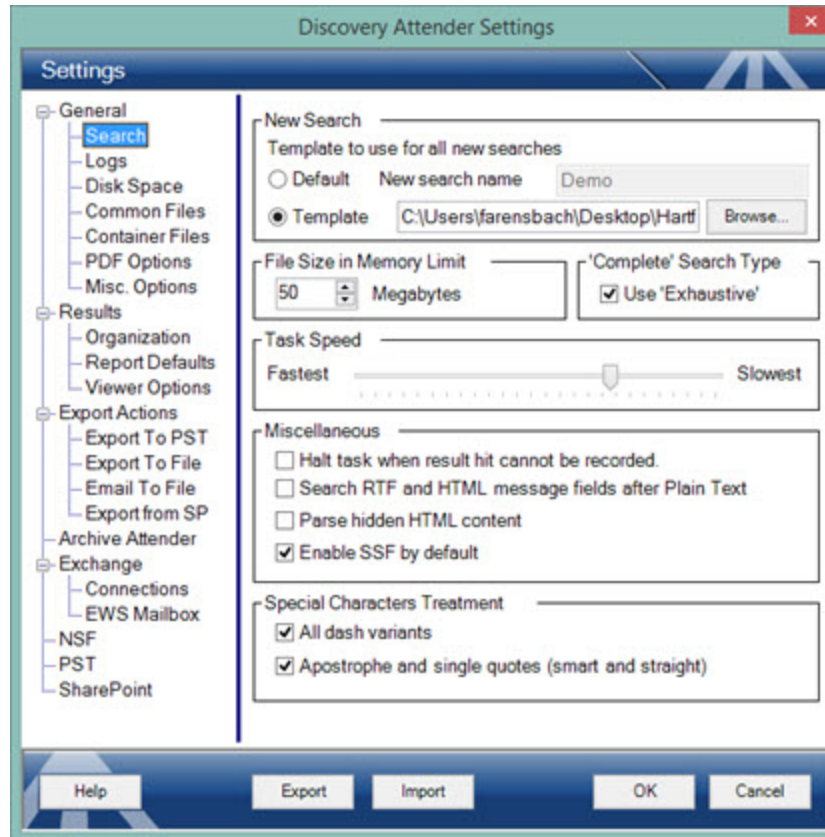


<p>Error Logging Level</p>	<p>This option adjusts the logging level to gain more detail about application activities, including searches and tasks. Debug logging enables certain features in <i>Discovery Attender</i> to aid in troubleshooting, but will also increase the size of log files, adding all available detail.</p> <ul style="list-style-type: none"> • Normal (Basic Details Only): Default. General information is logged • Debug: Highly detailed level of logging used to troubleshoot. This option also enables a context menu choice for further flexibility. • The Trace option should only be used in conjunction with a specific issue testing as the log files can rapidly increase in size.
<p>Search Processes</p>	<p>The <i>number of concurrent tasks</i> running during the search. Before increasing this value, make sure the machine has enough processing power and RAM to accommodate a heightened task load.</p> <p>Please Note:</p> <ul style="list-style-type: none"> • Changing this value will not affect currently running searches.

	<ul style="list-style-type: none"> • If searching an older USB drive (USB 1, USB 2), drop this value to 1. Older USB drives are single processing devices. Multiple concurrent tasks searching older USB drives will make the search slower and more prone to network and access errors. • When searching NSF files make this number should not be greater than 3. • The default value is 5 tasks running at once.
Check Search Interval	The amount of time the main process should check for new searches.
Watchdog Timeout	<p>The amount of time the main search process will wait for a task to respond. Each individual task is run as a separate process. The watchdog is used to prevent 'orphans' from occurring. Orphans are errors that may occur when a task encounters a situation where it cannot respond to the main search, for example, a corrupt mailbox or lost network connection.</p> <p>However, some large files or mailboxes may time out inadvertently before the task is finished searching the item. If a search is encountering large files or is experiencing timeout errors, reset the timeout for a longer period of time.</p>
Database Timeout	This option sets the amount of time the task process waits for a response from the database. If you are running a large search with multiple, concurrent database updates, it is a good idea to increase the database timeout to prevent failure of tasks.
Temp Directories	These settings allow the entry of alternate temporary directories. This is useful as the default temp directory is located under the program files directory. This default can be challenging if <i>Discovery Attender</i> is installed on space limited directory shares.

Settings: Search Defaults

This node contains options for enabling default values related to the creation and processing of a search.



New Search	Whenever a new search is created using the search wizard, a name is pre-populated in the search title field. The default search name is New Search . This option allows the user to select a new name to appear as the default description value. Alternately, the user can choose a template to use for the default new search. This option is suggested when different search options are used for most searches (e.g. file exceptions for file searches).
File Size In Memory Limit	By default, attachments and files under 10 MB in size are searched in memory as a byte stream for efficiency and speed. This option allows you to increase or decrease the size of the file that is searched in memory . Note: A value of 0 will ensure that no file or attachment will be searched in memory. This will add time to the search, but may be useful for troubleshooting.
'Complete' Search Type	The most expensive keyword search type, in terms of processing, is the proximity or 'NEAR' search. By default, a Complete search will find all keywords that match specific criteria return all keywords for reporting. However, to reduce search time, it will only find the first valid variation of a proximity expression. The Use 'Exhaustive' option allows all variations of a proximity expression to be returned for reporting purposes.
Task Speed	This option allows you to throttle the task speed to adjust processing power used by <i>Discovery Attender</i> for each task.. Decreasing the task speed will allow other non-related processes to utilize more system resources.
Miscellaneous	

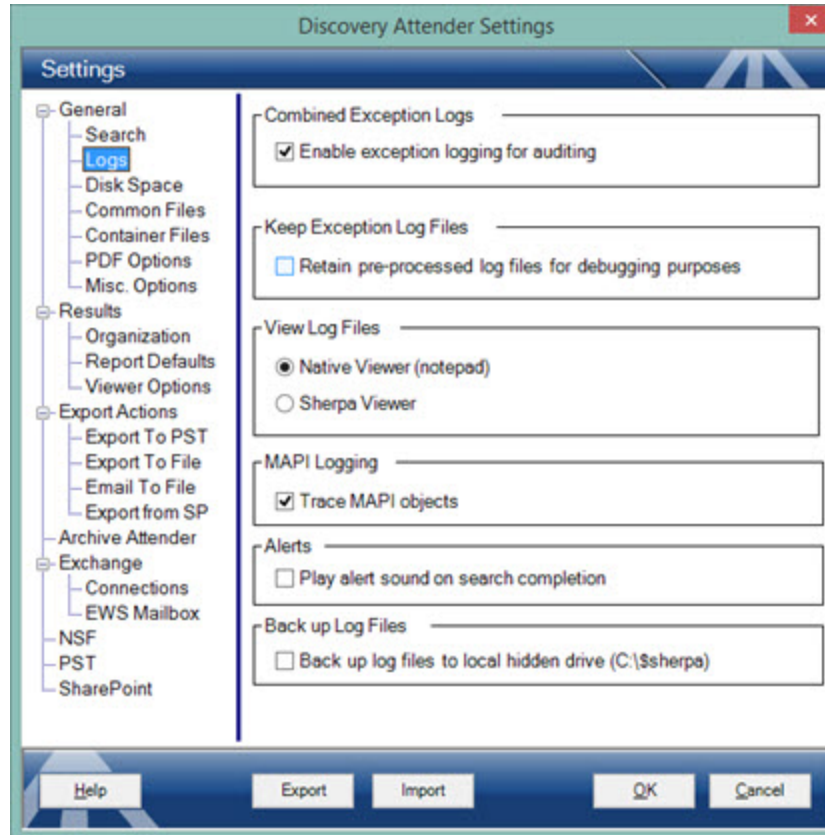
Halt task...	Certain errors types will stop a task and not allow it to continue. One of these errors, the UnRecordable error, arises when a result hit cannot be saved. By disabling this selection, the user will allow the task to continue and a special error entry will be inserted into the database.
Search RTF ...	<p>Messages in Exchange contain at least three different 'body' fields: plain text, RTF and HTML.</p> <p>When searching for keywords in a message, the plain text field is searched first (if it has a text value). By default, <i>Discovery Attender</i> will not continue the search on the RTF or HTML body fields if no criteria match is found in the plain text body.</p> <p>If you wish to search the RTF and HTML body fields <i>even if the plain text field is searched and no hit was found</i>, select this option.</p> <p>Please note: RTF and HTML body fields are searched automatically if the plain text body field has no value.</p>
Parse hidden HTML content	This option will parse out hidden HTML content where present. It is helpful for searching embedded HTML links and comments otherwise not visible in Microsoft Office documents.
Enable SSF by Default	<p>This option sets the defaults for Server Side Filtering (SSF) in the Wizard screen. When checked, all Server Side Filtering options will be enabled by default (but can be changed per screen) on the appropriate wizard screens. When disabled, the user must manually set each Server Side Filter for each criteria, if needed.</p> <p>Server Side Filtering uses queries against the actual data store database, be it Exchange, O365 or PST files. It helps to filter large amounts of data when using certain types of criteria. It significantly speeds up searching by reducing results *before* processing it in Discovery Attender. It is an optional feature, which can be set individually for keywords, addresses and dates. There are pros and cons of using SSF - the benefit of using SSF is speed. The downside is lack of precision (especially when using keywords) and lack of detail. Despite this, it is recommended for date criteria.</p> <p>Please Note: When Server Side Filtering is used, the log files will only reflect those values which pass the filter. For example, when searching Mailbox A with server side filtering disabled, the log file has an entry that reads "Searching folder 'Calendar' (Contains 1363 items)". However, when server side filtering is enabled for date criteria, that same log file may read "Searching folder 'Calendar' (Contains 125 items)". This entry refers only to the 125 items that passed the filter, not that there are only 125 items in the mailbox. Likewise, when SSF is enabled, the total number of items examined will only reflect the items that passed the filter, not the total number of items in the mailbox itself. If those numbers are important for reporting purposes, please do not use Server Side Filtering.</p>
Special Character Treatment	<p>These options, which are on by default, will treat some versions of special characters as the same for searching purposes. If one is entered as a search term, any keywords with the variants will also be found .</p> <ul style="list-style-type: none"> • All dash variants . When enabled, this option treats various dashes as

the same. For example, the hyphen '-' and the em dash '—'.

- **Apostrophes and single quotes (smart and straight)** - Both straight and so-called smart single quotes will be treated the same for searching purposes.

Settings: Log Defaults

This screen provides options related to enabling and viewing log files.

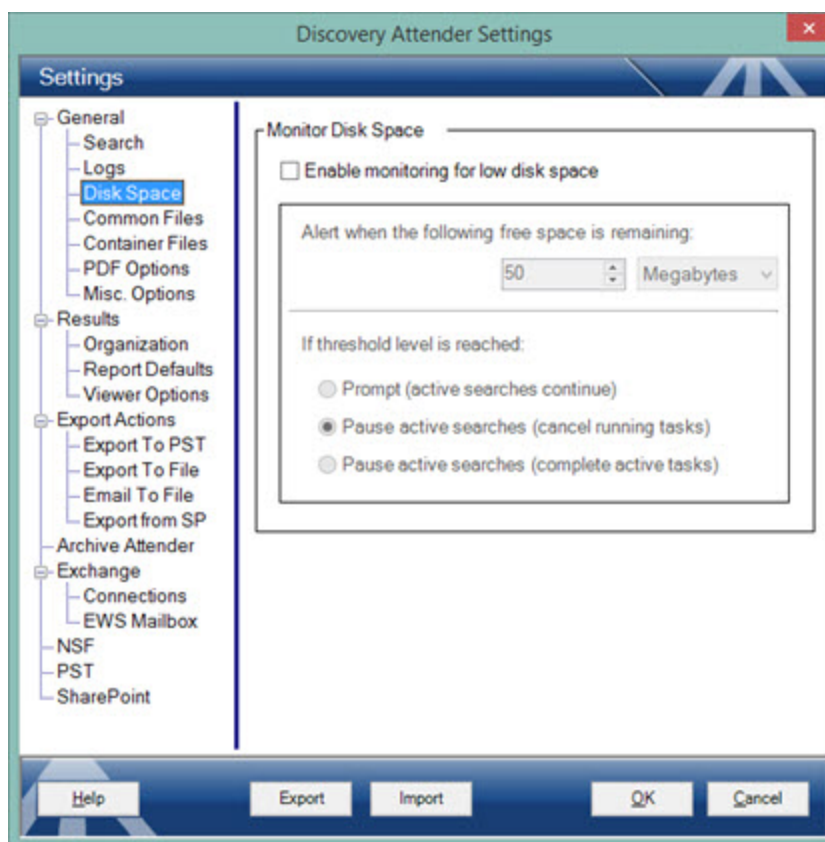


Combined Exception Logs	Enables the database storage of all exceptions encountered during the search. This, in turn, presents all errors, skips and warnings from all search tasks in a single view, from which they can be organized, reviewed and exported. This option is enabled by default.
Keep Exception Log Files	This will retain the raw, pre-processed exceptions. Only use this option for troubleshooting exception issues. It is disabled by default.
View Log Files	Gives you the option on how you would like to view the application, task and action log files. <ul style="list-style-type: none"> • Native Viewer (notepad) opens the log file in notepad for a simple view. This is the default. • Sherpa Viewer will open the log file in the Sherpa Text Viewer, which offers advanced functionality for searching. Please note, this option will only be

	enabled if the Sherpa Text Viewer is installed.
MAPI Logging	Enabling the Trace MAPI Objects option allows the user to enable advanced logging for troubleshooting purposes. It creates a log file that records every MAPI call. Please Note: This option should only be enabled if you are directed to do so by Technical Support for troubleshooting.
Alerts	Checking this option will play a sound at the completion of the search.
Back-up Log Files	This option is useful to provide a more secure location for the storage of log files. This option enables will create a copy of all log files to the default (and hidden) c:\sherpa directory. Designed for compliance purposes, this option keeps the log files independent of any project or search deletion.

Settings: Disk Space

This screen is used to set the options for monitoring disk space usage in Discovery Attender. The alerts set herein will warn users if disk space is running low. This option is very helpful for avoiding corrupt searches on machines where disk space is at a premium.

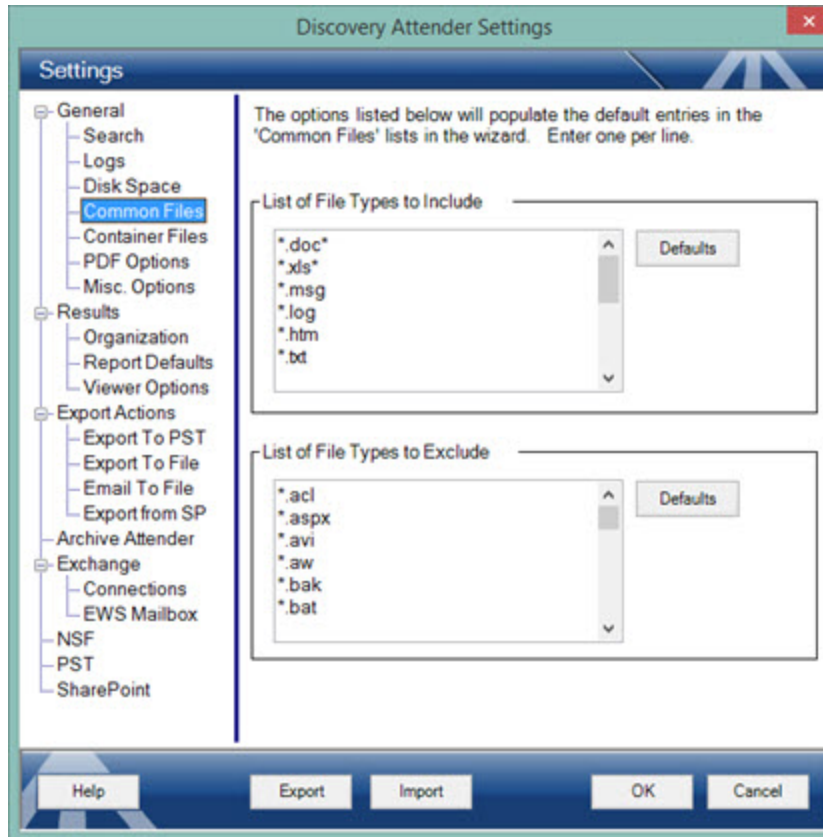


Please note: Disk space monitoring is off by default. Only use this option if your project is stored on a local (non-networked) drive. Using this option on networked projects (where the project is stored on the network) will cause memory issues.

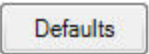
Enable monitoring...	This option initializes the disk monitoring feature and enables the other settings in this section
Alert when...	Size value of space remaining on a disc drive. An alert will be issued when this threshold is reached.
Threshold level	Options for actions taken when the disk space has reached a critical low point: Prompt. User will be prompted for an action to take while searches continue Pause active searches (cancel): The currently running search will be paused, with the active tasks being canceled. Pause active searches (complete): The currently running search will be paused, with the active tasks allowed to finish.

Settings: Common Files

This node supplies the lists for the [Common File Types](#) dialog box in the [File Names](#) search wizard screen. Rather than recreating these lists with each search, populating these lists will give you a standard set of file types to use in search criteria.



Please note: The [File Names and Types](#) criteria must be used and the options selected in the Search Wizard for filtering of these file types for any given search. When the **COMMON** button is selected in the Search Wizard, these file extensions will populate the resulting dialog box.

Include File Types	List of file types which will be set for the COMMON button Include list in the File Name search wizard screen.
Exclude File Types	List of file types which will be set for the COMMON button Exclude list in the File Name search wizard screen.
	Loads the default list of file types and inserts them into the appropriate list.

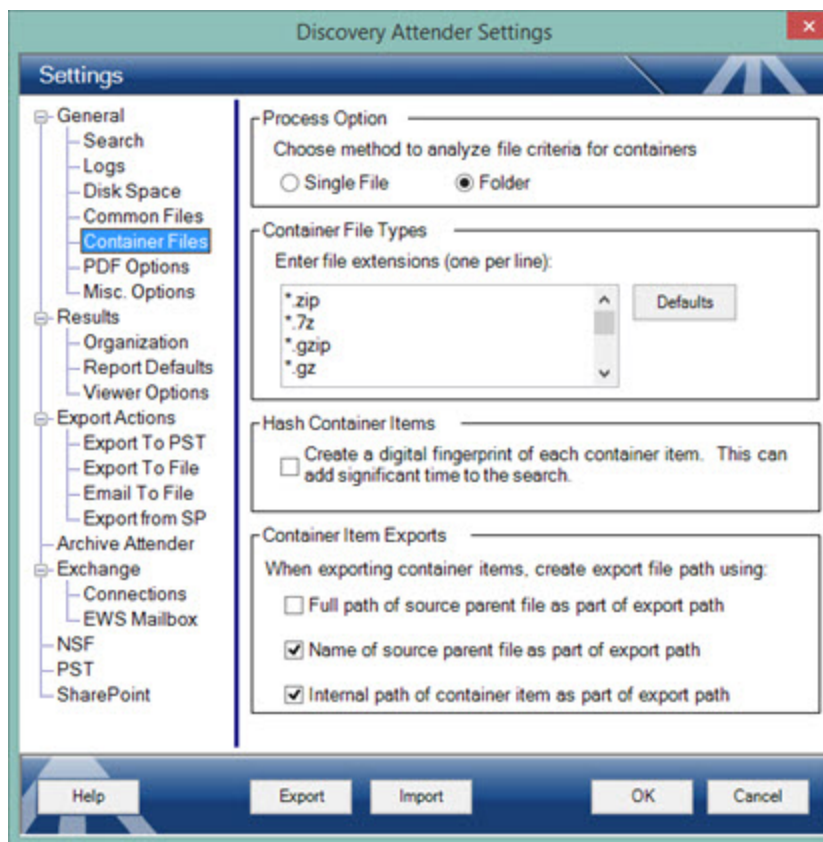
See Also

- [Main Console](#)

Settings: Container Files

This screen is used to set the options for processing container files in *Discovery Attender*. Users can identify which file types should be processed as compressed container files (i.e. files containing other files) as well as

how those containers will be processed.

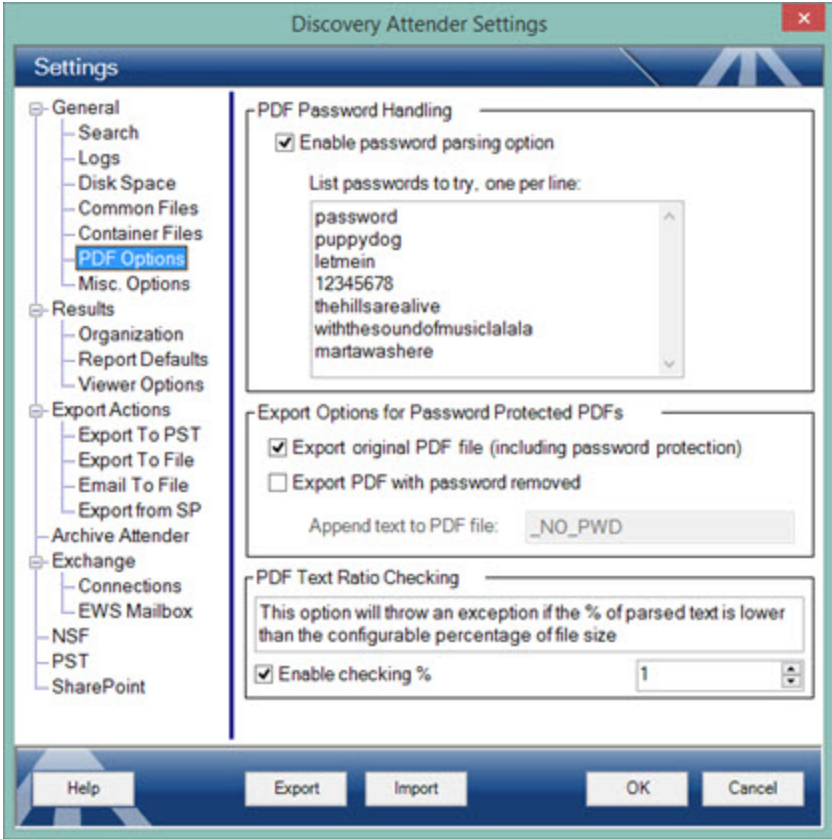


<p>Process Option</p>	<ul style="list-style-type: none"> • Single File: This option will process the container file first as a single file. This allows the file-based criteria such as Date and File Name to be used against the container without it being expanded. This is particularly helpful when trying to exclude .files in the container file list (such as .zip) from a search. • Folder (default): When a container file is found, this option first expands the container to its component files, then applies the file criteria (Date and File Name) to each child file. <p>Regardless of which option is selected, the container file is always returned as one result. There are options to export the container as a single file, or to export individual files. See Results Management for more detail.</p>
<p>Container File Types</p>	<p>This is a list of file extensions which are considered container files. Users can add or delete extensions from the list as needed.</p>
<p>Hash Container Items</p>	<p>This option will hash all child files of any container that has a hit. It is useful for validating files, but it can add significant time to your search.</p>
<p>Container Item Exports</p>	<p>This option controls the path structure for individual files exported from a container. When checked, the choices will be added to the export path.</p> <ul style="list-style-type: none"> • Full Path of Source Parent File includes the entire path of the source container file.

	<ul style="list-style-type: none"> • Name of source parent file will add the name of the source container file to the export path • Internal Path will add the internal folder structure (if present) of the container file to the export path.
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Settings: PDF Options

This screen is used to set the options for the handling of PDF passwords. By default, any PDF with a password is listed as an exception. *Discovery Attender* will attempt to apply a user entered list of passwords to PDF files found to be password protected.



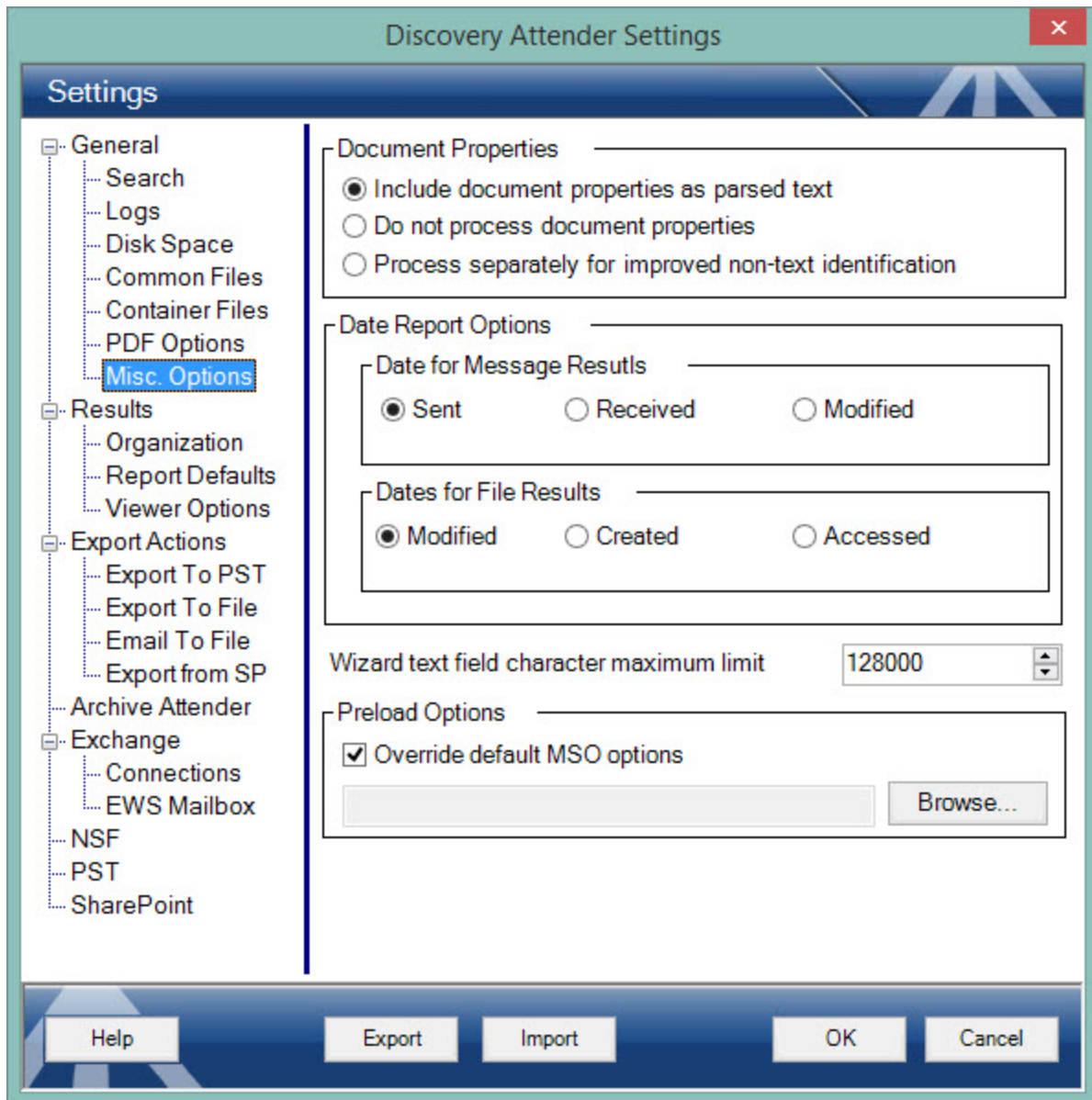
Please note: The passwords listed above are examples. This functionality is enabled by default. It is a best practice to enable this option, and also to list at least one password.

PDF Password Handling	<p>By enabling the PDF Password handling, <i>Discovery Attender</i> will apply the list of passwords to encrypted or password protected PDF files. If the applied password works, it is stored with the result and be made available on the reports.</p> <p>Enter the passwords, one per line, in the box provided.</p> <p>If this functionality is not enabled, all password protected PDF files (including those with 'blank' passwords) will be listed as an exception.</p>
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Export Options	<p>If the password for a protected PDF file is found, there are several choices for export. Choose to export the original PDF with password intact, the PDF with password removed, or both. The export will follow the conventional Export to File guidelines.</p> <p>Please note: When exporting attachments, only the original file is exported as it is part of the source message and cannot be removed from this context. The reports, however, will give the password, if found.</p>
PDF Text Ratio Checking	<p>This option is designed to help identify 'image only' pdf files. The problem is that almost all PDFs, including those scanned, have some text associated with them. By allowing the user to determine the point at which an exception will be generated, this option helps separate PDFs that contain mostly images for separate processing via exception reporting.</p> <p>To use this option, first select 'Enable Checking'. Next, use the 'Percent Ratio' box to enter the percentage of text under which an exception should be generated. For example, if the <i>Percent Ratio</i> is listed as 2%, any PDF document where the amount of text is less than 2% of the total document size will throw an exception during the search. Any PDFs with the amount of text over the threshold will be searched as a typical file.</p>

Settings: Miscellaneous Options

This screen is used to enable various application options such as document properties, date report values and others.

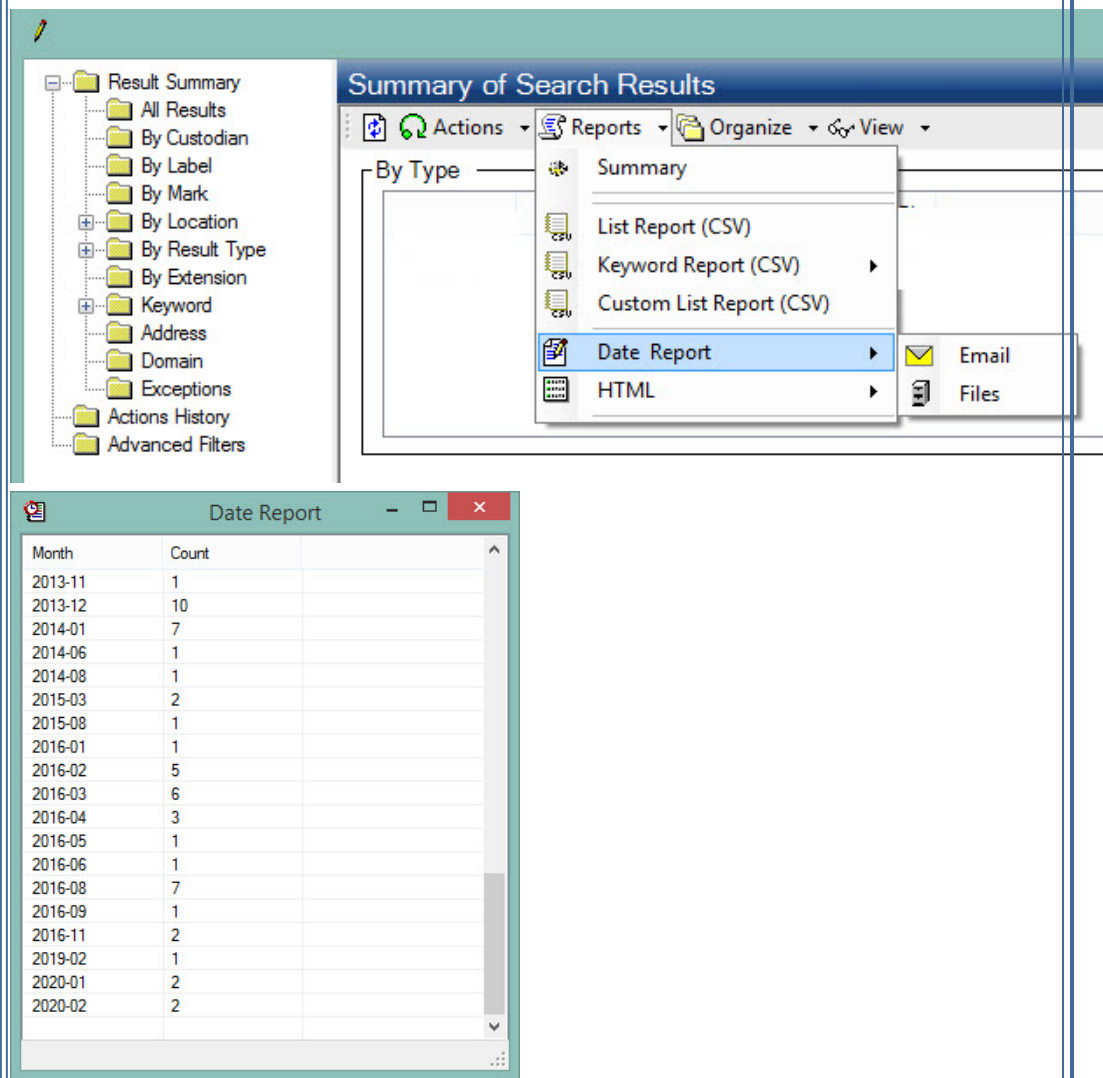


Document Properties	Document properties are metadata that is sorted with the document but not normally shown when a file is opened in its native program. Use the following options to determine how to handle these properties.
Include as parsed text	When selected (default) document properties are included as part of the parsed text of an applicable item. This is helpful because they can be part of the keyword search. However, if the file contains no text, the addition of the document properties may preclude the identification of non-text items.
Do not process	This option allows the search process to ignore all document properties and excludes all document properties from any text searching.
Process separately	This option helps to better identify non-text documents while also searching the document properties. It does add time to the search, but this is the best option for non-text identification.

tification.

Date Report Options

Date reports are found in the Result Management screen under Reports | Date Reports. This section in the Settings allows users to choose which dates they want to have represented in the report.



Date for Message Results

This option indicates which date should be used to populate the Date Report values for any type of email results.

Note: for the purposes of reporting dates, both Messages and Attachment results will use the source Message dates.

Date for File Results

This option indicates which date should be used to populate the Date Report values for file results.

Wizard Text

This option sets the maximum character length for the wizard text fields on the Keyword, File Name and Address criteria pages. The default value is 32,000. It can be increased up to 128,000, but this will have performance implications.

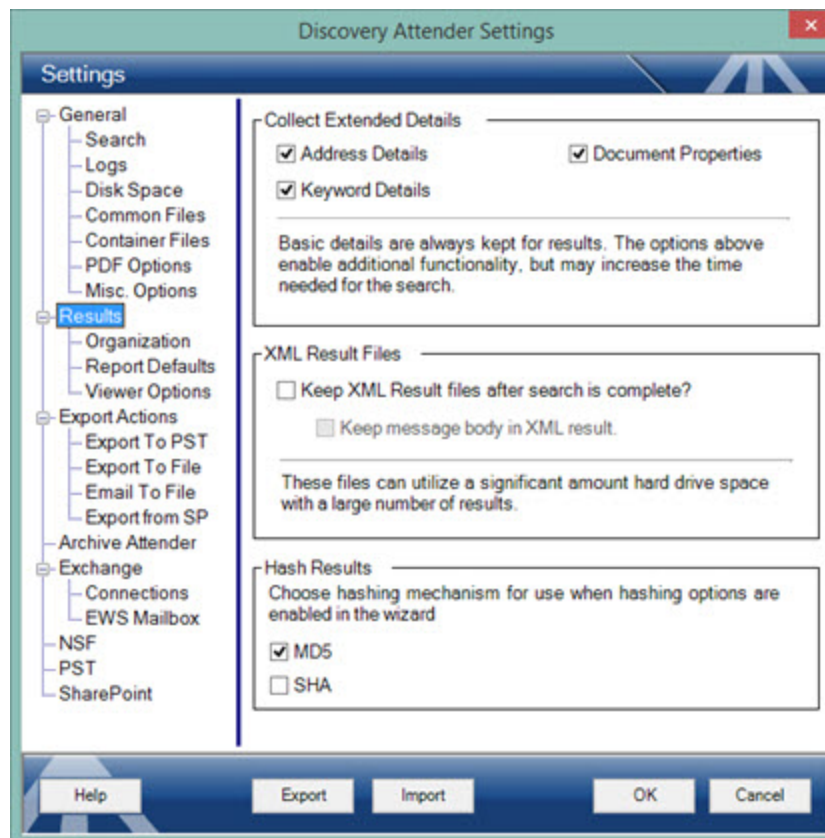
Preload Options	These options are used to eliminate certain issues regarding the use of MSO dll files. These settings are used to force Discovery Attender to load the requisite MSO files at application start-up. It also provides the option to use an alternate path to locate those .dlls, rather than the default Windows location.
Override default MSO options	When enabled, the MSO dlls are loaded at start-up. This should be enabled by default for all systems running 64-bit Office 2016 or greater to avoid issues exporting email.
Path	When needed, the MSO dlls at the path specified are used instead of the defaults. Note: Do not change this option unless instructed to do so by technical support.

See Also

- [Main Console](#)

Settings: Result Defaults

This node contains options for details and files collected for results items during a search.



Collect Extended Details

In addition to the basic keyword and address details stored in every search, *Discovery Attender* has access to detailed keyword details, address details and document properties. To store this information in the database for reporting purposes, select these

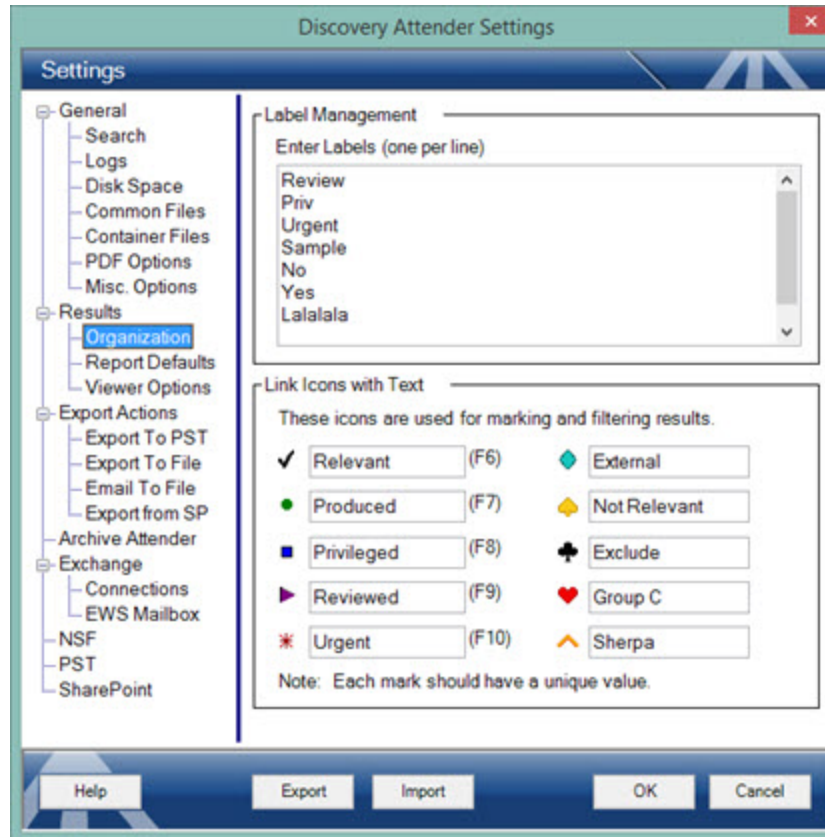
	<p>options.</p> <p>Please Note: Selecting these options will increase the time of your search and add to the size of the detail database. However, various search functions (complete search) and result views (by property) depend on them. Only disable the <i>Keyword Details</i> and <i>Address Details</i> options if you will never need to run reports or use views grouped by keyword or address.</p> <p>The <i>Document Properties</i> are internal metadata stored by certain types of programs (Microsoft Office, PDFs etc.). This information can include detail such as <i>Author</i>, <i>Template</i>, <i>Company</i> as well as the internal file creation and modification dates.</p> <p>Have care when selecting this option. Not all file types store this internal information. Please keep in mind that if the document is encrypted or password protected, Discovery Attender cannot gather this internal property information and will issue a warning exception.</p>
<p>XML Result Files</p>	<p><i>Discovery Attender</i> creates an individual file in XML format for each result hit that it finds. Under normal circumstances these files are deleted once the hit is recorded in the database. However, these files are very useful when troubleshooting certain search issues. Be certain you have sufficient hard drive space if you select this option.</p> <p>Please note: Any XML files created will be stored in the Results sub-folder under the search directory. Deleting the search will also delete these files.</p>
<p>Hash Results</p>	<p>This option allows you to select the type of hashing (MD5 or SHA or both) to use when the option is enabled on the Result Options screen of the wizard. The selected hash types are then stored with the result record in the database and can be viewed in the reports as well as Result Management screens.</p> <p>The default is MD5 hash only.</p> <p>Note: The hashes are calculated using .Net hashing algorithm. SHA is 512 bit and add significant time.</p>

See Also

- [Main Console](#)

Settings: Organization

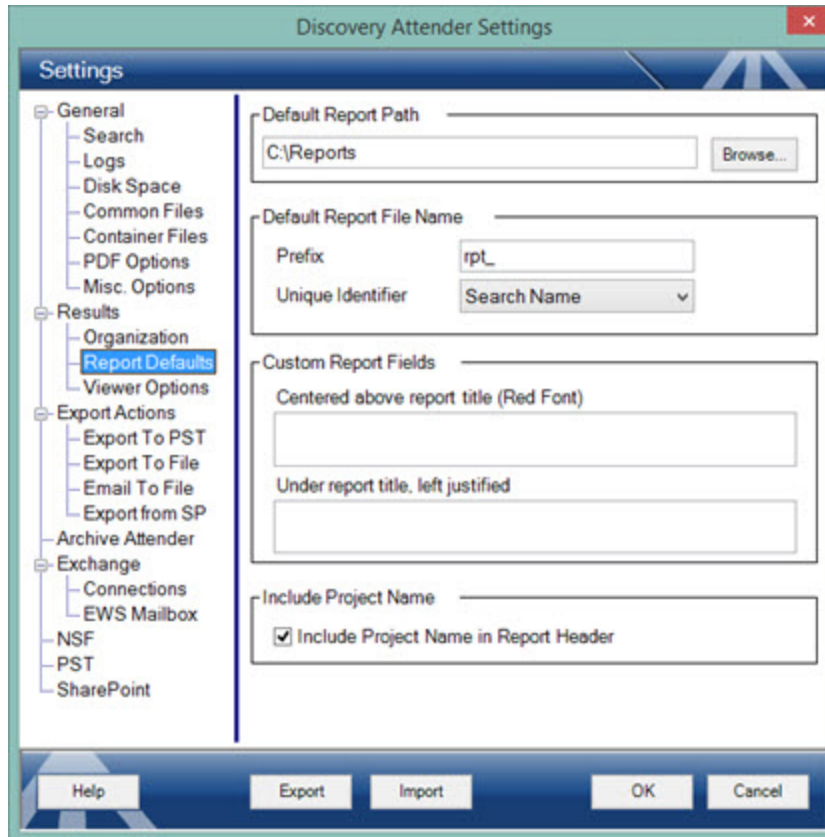
This node allows you to set organizational options that will appear in the [Result Management](#) views.



Label Management	<p>This section adds, removes or edits the labels that are available in the <i>RESULT MANAGEMENT</i> views. These labels are used for filter and notation purposes.</p> <p>The changes made here will affect label lists for all projects and searches, but labels on existing items will <i>not</i> be affected.</p>
Link Icons with Text (for Marks)	<p>This section allows the user to change the default text values of the icons used for marking items. The associated function keys are listed to the right of the text.</p> <p>To change a value, type in the new value next to the appropriate icon. Click OK to save the changes. The new values will show up in the application menu and filters, but the icons will remain the same. The <i>RESULT MANAGEMENT</i> screen will have to be reopened for the changes to take effect.</p>

Settings: Report Defaults

These options set the defaults for certain properties of Summary and Detailed [HTML reports](#).



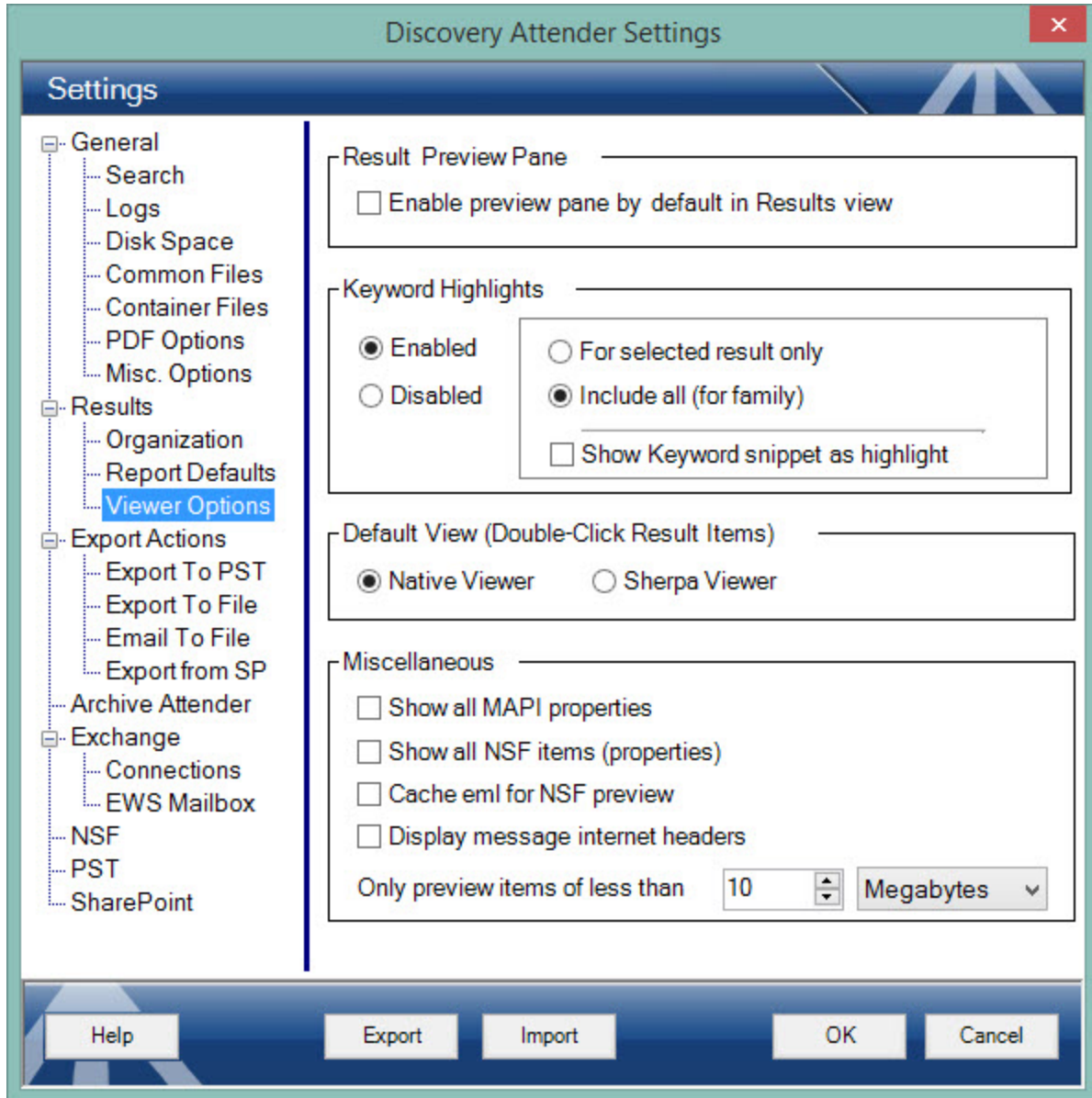
<p>Default Report Path</p>	<p>This option sets the default location to save reports when an HTML report is created. Click BROWSE to select the path from a dialog box to select a path.</p> <p>Please note: <i>Discovery Attender</i> will create this path if the default path does not exist.</p>
<p>Default Report File Name</p>	<p>This option sets the defaults for the report name details. Keep in mind the report name by default is formatted <i>Prefix_Type_UniqueID_Date.html</i>. The user can change the defaults for the report name prefix and Unique ID. The Unique ID gives the user a choice between using the Search Name or the Search GUID.</p> <p>Please note, these defaults can be overwritten at the time of the report creation.</p>
<p>Custom Report Fields</p>	<p>The user can customize two areas in the report itself. The first area, which will appear in Red font above the title may be suitable for words like <i>Internal Review Only</i> or <i>Company Confidential</i>. The second might be useful for company or department details. The user can leave these custom fields blank or enter plain text.</p> <p>Note: HTML should not be entered in the custom report fields, as the literal text will be taken from these fields.</p>

Include Project Name

This option will place the name of the project in the report header.

Settings: Viewer Options

This screen is used to set the default options for viewing results in Discovery Attender.

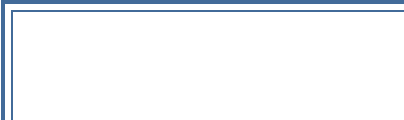


Please note: This page reflects options for both the Preview Pane and the Text Search Viewer.

Result Preview Pane

When enabled, this option will show the Preview Pane by default in all appropriate [Result Management](#) views. If disabled, the Preview Pane must be manually enabled using the [menu options](#).

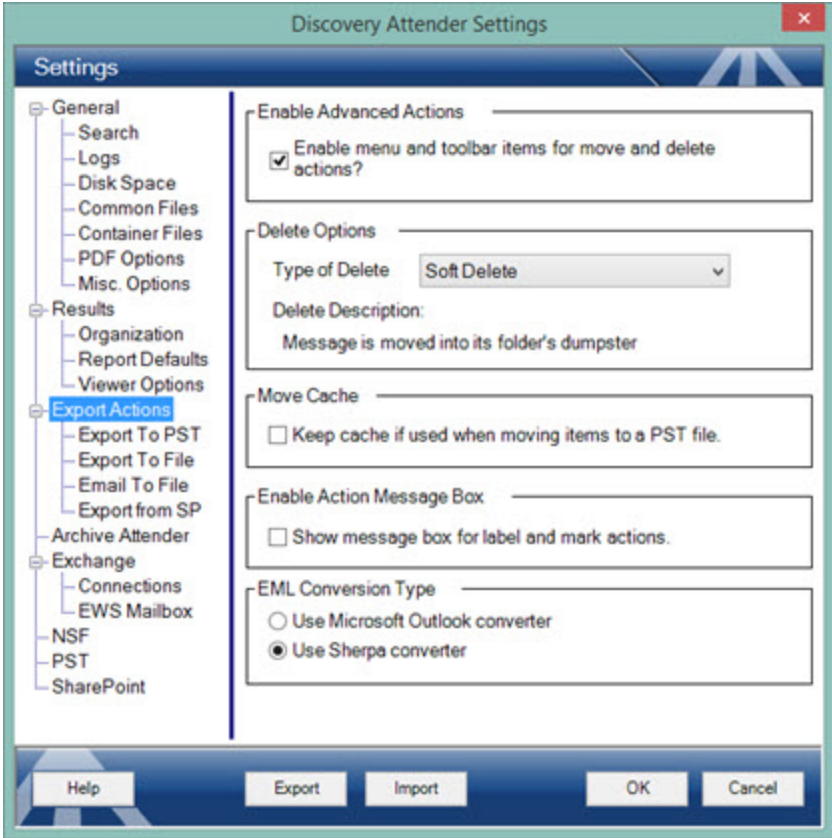
Keyword Highlights	<p>This option enables or disables the keyword hit highlighting in the Preview Pane and Text Search Viewer. It is enabled by default to help find keyword hits in the viewers.</p> <p>When enabled, users have a choice to enable keyword highlighting for just the keywords that matched the document selected, or any keyword that matched the entire family (e.g. email messages and all attachments). Enabling these options for the family helps with review as the entire email is shown in the preview pane.</p> <p>The option to show entire keyword snippet is very helpful when reviewing items that were found using regular expressions. Generally speaking however, regular expressions are not displayed in hit highlighting.</p>
Default View	<p>By default (double-click) or using the Open action, this setting will dictate which viewer shall be used to open individual result items.</p> <ul style="list-style-type: none"> • Native Viewer opens the file in its associated application, if that associated application is installed. For example a .doc or .docx file will open with Microsoft Word. You will not see keyword hit highlights, but format will be maintained. Some restrictions apply. • Sherpa Viewer (default) will open the file in the <i>Sherpa Text Viewer</i>, which extracts all text from the file, highlights the keyword hits and offers advanced functionality for searching. However, format cannot always be maintained, and images cannot be shown. Please note, this option will only be enabled if the Sherpa Text Viewer is installed.
Miscellaneous	<p>When the <i>Sherpa Text Viewer</i> or <i>Preview Pane</i> is used to open results, this option enables the view of advanced properties normally hidden from view.</p>
Show all MAPI Properties	<p>Generally used for trouble shooting, this option displays all the MAPI properties for the selected message in the viewer.</p>
Show all NSF Properties	<p>Generally used for trouble shooting, this option displays all the NSF specific properties for the selected message in the viewer.</p>
Cache EML for NSF Preview	<p>This option makes opening or preview of items found in NSF files more efficient by creating an EML file for each NSF result.</p> <p>Without this option enabled, NSF sourced messages will be pointing to the original NSF file for previewing purposes. With this option enabled, EML files will be created in a cache for all NSF based results. This will significantly improve preview time for NSF items. However, there must be adequate space in the project directory.</p>
Display Message Internet Headers	<p>This option shows the entire Internet Header property as part of the property pane.</p>
Only preview items less than... [Threshold]	<p>This option sets the threshold for items to be previewed. Very large items will take a long time to open, so it is a good idea to set this value.</p>



Please note: An item can still be opened even if it is above the preview size threshold by selecting the **Open Item** option in any of the results views.

Settings: Export Actions

This screen sets default options for export actions.



<p>Enable Advanced Actions</p>	<p>This box allows the <i>Advanced Actions</i> menu and tool bar items to be displayed in the <i>RESULTS MANAGEMENT</i> screen. By enabling this feature, users will be able to access the <i>Move to PST</i>, <i>Move to Individual File</i> and <i>Delete</i> functionality.</p> <p>The default is False.</p>
<p>Delete Options</p>	<p>Allows the user to select the deletion type for Exchange based messages. The Delete Description gives more detail on each type as the selection changes.</p> <p>The default is Soft Delete.</p>
<p>Move Cache</p>	<p>The process to move a message to PST when not using the <i>Store to Store Copy</i> export option consists of four steps per message item:</p> <ol style="list-style-type: none"> 1) Copy the item from the source location to the message cache in the Discovery Attender program directory.

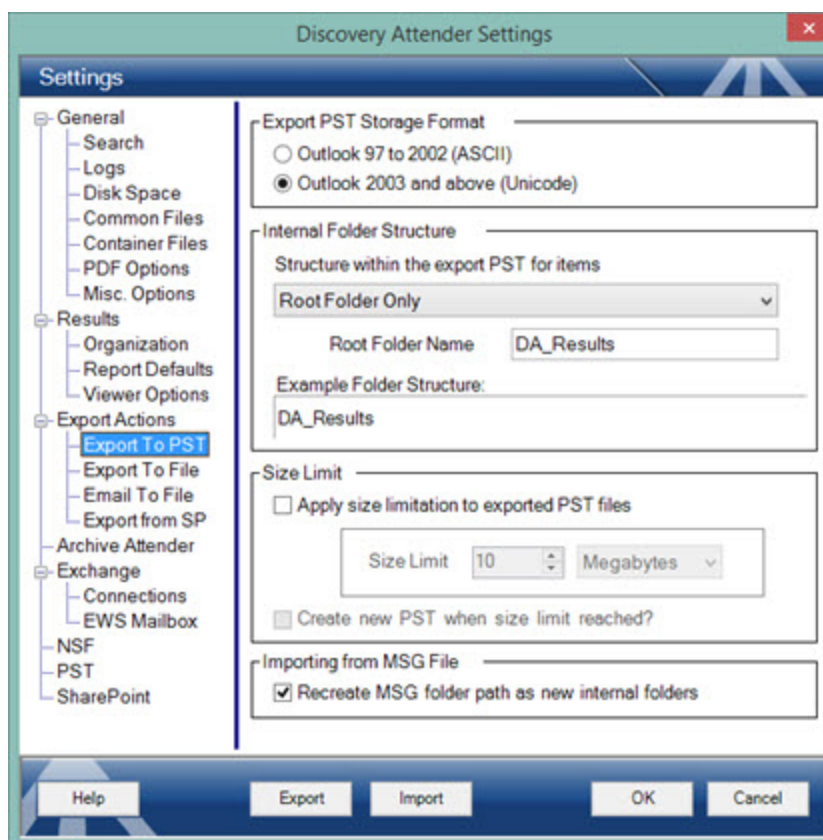
	<p>2) Import the message from the message cache to the PST file.</p> <p>3) Delete the message from the original source.</p> <p>4) Delete the message from the cache after the successful completion of the first three steps.</p> <p>If the Move Cache box is checked, the message will stay in the cache and not be deleted from the hard drive. This acts as an extra safeguard if you anticipate running into corruption or size limitations. Before using this option, verify you have sufficient space on your local hard drive.</p> <p>This option does not apply if <i>Store to Store Copy</i> is enabled or if caching is being used and the item's pointed location is local.</p>
<p>Enable Action Message Box</p>	<p>Some of the organization actions (ignore, mark, label) which do not normally merit the action dialog box will show a final message box with the status.</p> <div data-bbox="634 758 1211 1163" data-label="Image"> </div> <p>This option enables or disables that message box.</p>
<p>EML Conversion Type</p>	<p>This option sets the conversion methodology utilized by Discovery Attender. There are two choices</p> <p>- <i>Use Microsoft Outlook converter</i>. This option is best used for older versions of Outlook to maintain as close to native processing as possible. Newer versions may not support this functionality.</p> <p>- <i>Use Sherpa Converter</i>. When newer versions or updates of Outlook disable EML or MSG functionality, this option can mimic the process to maintain MSG or EML features.</p>

See Also

- [Export to PST](#)
- [Export to File](#)
- [Email to File](#)
- [Export from SharePoint](#)

Settings: Export to PST

This screen allows users to set the defaults for exporting to the Microsoft Personal Folder (PST) format.



PST Storage Format	<p>If the user chooses to Create a New PST when exporting messages, <i>Discovery Attender</i> will use the UNICODE (Outlook 2003 and above) format by default. This is the current standard and should not be changed.</p> <p>Note: Outlook 97 to 2002 (ASCII) format PSTs can be opened by any version of Outlook supported by <i>Discovery Attender</i>. However, it is an older format that does not handle modern text or many non-English languages. Additionally, the export PST size is limited to 2 gigabytes in size. Other format limitations also apply. Please see PST file limitations for more detail.</p> <p>Unicode)is the default export format.</p> <p>Please Note: The export PST files created are generated from template files stored in the BSFPST sub-directory.</p>
Internal Folder Structure	<p>When exporting message items into a PST file, the user can choose the internal folder structure for the export PST. This helps to make the output more readable and user-friendly.</p> <p><u>Structure within the PST for items:</u></p> <ul style="list-style-type: none">• Root Folder Only: All messages items are copied into the root folder. There is no internal folder structure. The default folder name "DA_Res-

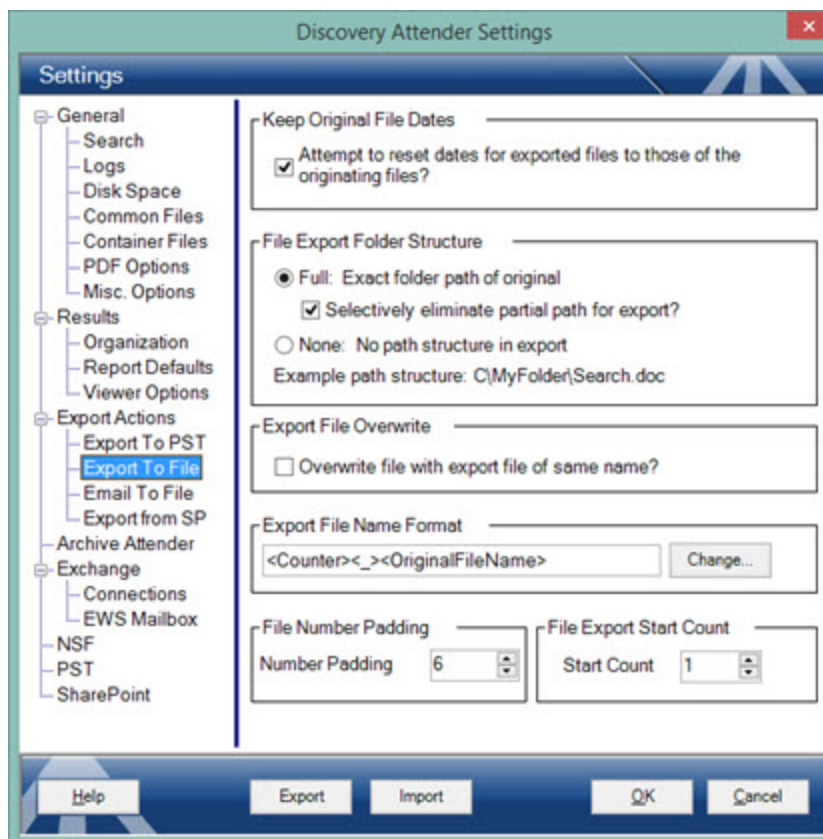
	<p>ults" can be changed by the user.</p> <ul style="list-style-type: none"> • Internal Structure Only: Recreates the internal folder structure of the source item. If an item was found in <i>Inbox\Accounting\2012</i>, the exported message will be found in those folders in the exported PST. This option is the default. • Root Only with Internal Structure: All messages are copied into the root folder using the internal structure of the source item. • Name Only with Internal Structure: Items are exported to a folder created using the name of the repository (PST Name, Mailbox Name, Public Folder Name) plus the internal structure of the source item. If the message was in a PST named 'JohnDoe.pst', then the exported item will be found in the <i>\JohnDoe.pst\Inbox\Accounting\2012</i> folder in the export PST. • Full Path with Name and Internal Structure: A folder structure is created using the full path of the source object (PST Path, Mailbox Server and Name, Public Folder Server, Mailbox etc.), plus the internal folder structure where the original message was found. This is particularly useful if retaining structure is important, but you have many sources with the same name. <p><u>Root Folder Name:</u> When using the root folder options, the user can designate a root folder name. The default is <i>DA_Results</i>.</p>
<p>PST Size Limit</p>	<p>Apply Size Limitations: Checking the Apply PST Size Limitations box will have <i>Discovery Attender</i> monitor the export PST size. This helps avoid corrupt files if the size limitation is exceeded, slow access for excessively large PST files.</p> <p>When moving or copying items to a PST file, <i>Discovery Attender</i> cannot decipher Outlook PST item limitations. The PST file, in turn, does not return an error when messages are over the item or message size limit. The user should know the version and format of the export PST file. Users should also be aware of number of messages being copied to individual folders and the limitations thereof. Verification is especially crucial when moving items to a PST as the source items may be lost if limitations are exceeded</p> <p>Create New PST when Size Limit is Reached: With the Apply Size Limitation choice, the user has the option to create a new PST when the size limit is reached. The PST name will be the user chosen name plus a number indicating it's the successive PST iteration. For example if the original export PST 'Results.pst' reached the size limit, the next file would be named <i>Results_1.pst</i>. If this option is unchecked, <i>Discovery Attender</i> will stop processing actions once the size limit is reached.</p>
<p>Importing from MSG File</p>	<p>For MSG results exported into PST files, this option will recreate the file path from the MSG file into the new PST file.</p>

See Also

- [Actions](#)

Settings: Export to File

This screen allows users to set the defaults for exporting to individual files in native format.



Keep Original File Dates	<p>Certain operating systems and/or file system types will not preserve key dates when copying or moving a file to a new location. If you check this option, Discovery Attender will attempt to reset the key file dates of the copied file to reflect those of the source file.</p> <p>This option is not valid for message or attachment result items.</p>
File Export Folder Structure	<p>When copying or moving result items to the hard drive, the user has different choices in creating the file path structure of the copied or moved item:</p> <ul style="list-style-type: none">• Full: The entire path of the source item is copied. For a file result, this means the full path. Any drive letters or other poorly formatted names will be normalized. For Mailbox or Public Folder results, the format will be <i>Server NameMailbox Name</i>. For PST and Archive Attender results, the full path of the stored location will be used.• Selectively Eliminate partial path for export? This option allows the user to enter the portions of the export path they would like to eliminate. For example, a file found in C:\Users will recreate those paths in the export when the 'Full' option is selected. By choosing the selective elimination, the user can enter the portion of the path as one of the options when exporting from the

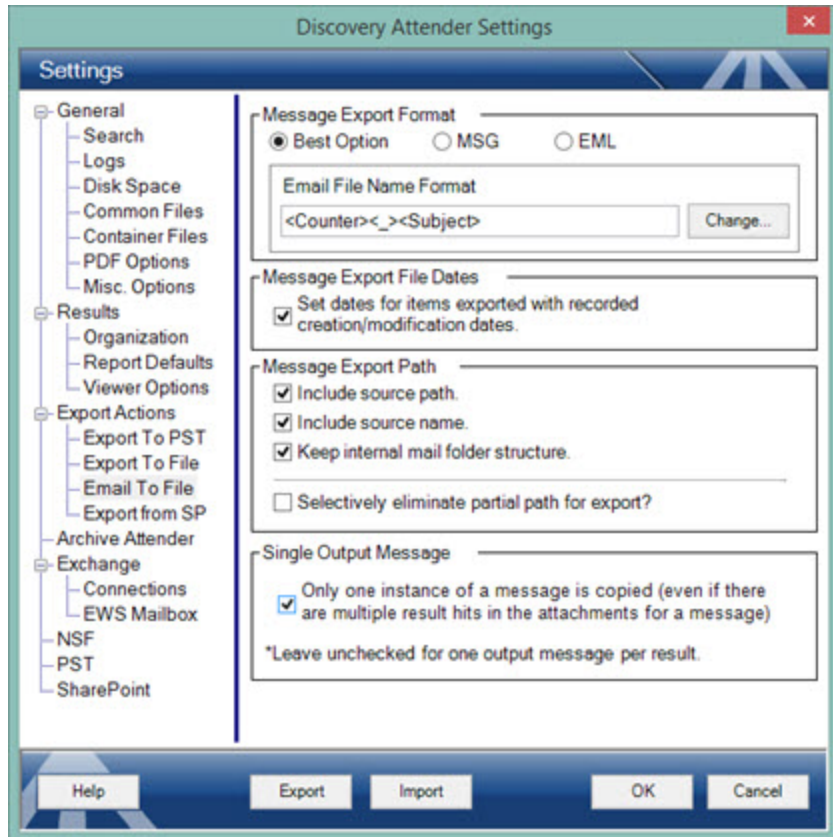
	<p>Results Management screen.</p> <ul style="list-style-type: none"> • None: All result items will be stored in a user chosen location, with no sub-folders recreating the original source location. <p>Please note: This option is valid for message and attachment exports as well as file results. See the Email Specific for additional individual file settings for mail data store results.</p>
Export File Overwrite	If a file of the same name is found in the export directory, should the exported file overwrite the existing file? Check to overwrite, leave blank to increment the file name.
Export File Name Format	<p>Users can customize the export name of a file result. By default the format is the original file name. Use the CHANGE button to open the Export File Name Format dialog box to modify the format.</p> <p>The default export file name format is the original file name.</p>
File Number Padding	When counters are used as tokens in the export file names, this value controls the padding for the number where trailing zeros will be used to fill out the number. For example, a counter of 42 with a padding of 6 will appear as 000042 in the export file name.
File Export Start Count	When using counters as tokens, this value controls the starting point of the counter at the beginning of the export.

See Also

- [Actions - Copy to File](#)

Settings: Email to File

This screen allows users to set the defaults for exporting to individual email files.



Message Export Format

Choice for the type of export file format of an email item. The default is **Best Option**.

- **Best Option** lets Discovery Attender choose which format to use. Results sourced from Microsoft Exchange based data stores such as PSTs, O365 or on-prem Exchange servers will be exported to MSG format, those from Mbox or NSFs will be exported to EMLs.
- **MSG** is the Exchange default format for messages saved as individual files. It is identical to the format of a message when exported as an individual file from PSTs, Microsoft Exchange or Outlook.
- **EML** is another email individual file format, considered closer to the [RFC-822 standard](#) than Microsoft's MSG format. EML is often used for exports from NSFs, MBOX, Outlook Express and other email clients. Be aware that exporting messages to this format may result in the loss or alteration of metadata to comply with the format.

Please Note: Discovery Attender does not convert messages. This includes from EML to MSG, PST to EML, or NSF to MSG. However, the [PreSearch Tool](#), included with Discovery Attender, has many conversion options. It can be accessed from the Tools Menu in the [Main Console](#).

Email File Name Format

Users can customize the export name of an email result. By default, the format is the original file name. Use the **CHANGE** button to open the [Export Message Name Format](#)

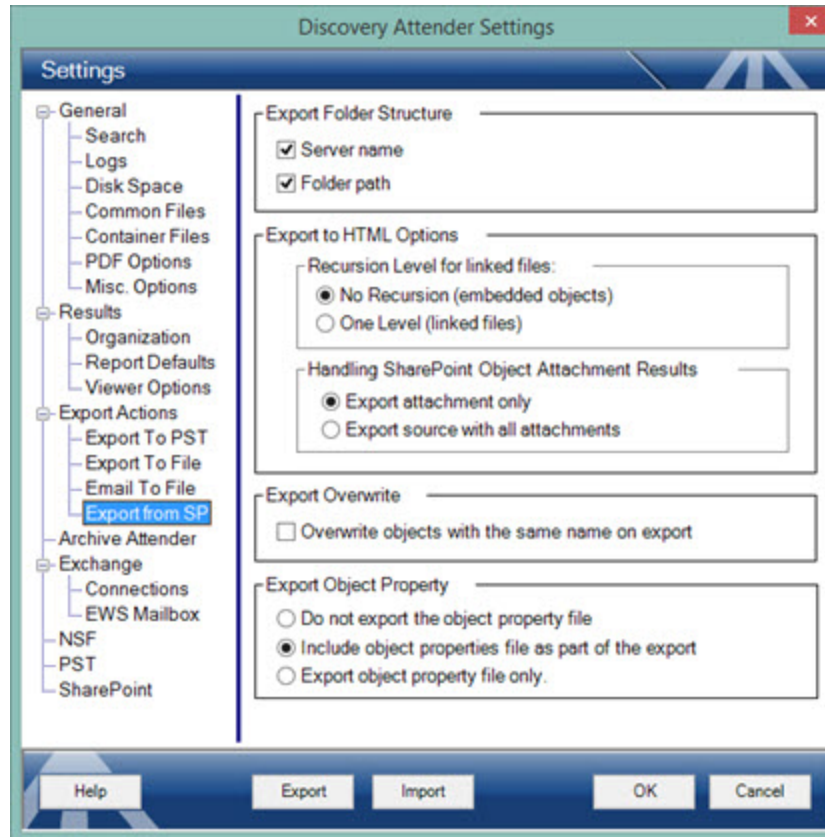
	<p>dialog box to modify the file name format.</p> <p>The default export file name format is a unique identifier.</p>
Message Export File Dates	<p>When message files are exported from a mailbox or PST data store, the creation and modification dates are set by the file system. This option attempts to set the creation and modification dates to those associated with the message in the original mail store.</p>
Message Export Path	<p>These options will control the export path that is created to store the exported email file.</p> <ul style="list-style-type: none"> • Include Source Path: The path (or server) of the source data store for a given result will be recreated as part of the export path • Include Source Name: The name of the file or server of the source data store will be recreated as a folder as part of the export path. • Keep Internal Mail Folder Structure: The internal path (e.g. <i>Inbox \ Accounting</i>) of the result will be recreated as part of the export path. • Selectively eliminate partial path for export The user can select a portion of the path to *not* include in the export path. A dialog will be presented at the time of export where the user can enter the portion or portions to eliminate.
Single Output Message	<p>When searching both messages and attachments, the message body and the attachment may both match in the same message. This causes two result hits to be displayed in the results set. However, exporting the source message twice will create duplicates in your export data set.</p> <p>This Single Output Message option, enabled by default, will prevent an attachment result from exporting if the source message (which always contains all attachments) has already been exported. The attachment record will be updated to indicate that the source message has been copied.</p> <p>If this option is disabled, you may get multiple copies of the same message in your export data set.</p>

See Also

- [Actions](#)

Settings: Export From SharePoint

These options control the export of files from SharePoint.



<p>Export Folder Structure</p>	<p>When copying or moving result files from SharePoint to the hard drive, there are different options for creating the file path structure of the exported item:</p> <ul style="list-style-type: none"> • Server Name: Includes the name of the SharePoint server as part of the path. • Folder Path: Recreates the SharePoint internal path as part of the exported path..
<p>Export to HTML Options</p>	<p>Some data types that are stored in SharePoint are exported as HTML files including Wiki Pages and Events. The options here provide flexibility which helps maintain the visual context of the items upon export.</p> <p>Recursion Levels for Linked Files</p> <p>This option handles files (for example, an image) that appear as part of various HTML objects. In SharePoint these items appear as if they were a part of the HTML file, but from a structural point of view, they could be embedded into the object, and therefore contained there in, or linked. This means the file is shown in a browser for that page, but is really stored elsewhere. This option gives you a choice on how to handle these files.</p> <ul style="list-style-type: none"> • No Recursion (Embedded Objects): Includes all the embedded objects as part of the exports • One Level (Linked Files): Follows the link and collects the source file to include as part of the export. <p>Please note: This generally takes more time. Furthermore, the linked</p>

	<p>file may not always be accessible, or may be too big to export.</p> <p>Handling SharePoint Object Attachment Results</p> <p>Sometimes a match is found in a file attached to a SharePoint object (think of an email message with an attachment). This option gives you a choice on what should be exported when a SharePoint Attachment result is found:</p> <ul style="list-style-type: none"> • Export Attachment Only: Only the file which had the matching result will be exported • Export source with all attachments: The entire source file - along with any other attachments - will be exported to maintain the full context. However this may contain unwanted information.
Export Overwrite	<p>If a file of the same name is found in the export directory, should the exported file overwrite the existing file?</p> <p>Check to overwrite, leave blank to increment the file name.</p>
Export Object Property	<p>Items stored in SharePoint which are not found in document libraries will have a record of all the properties associated with that object. For some SharePoint objects, this property file is the only content that can be exported. This option controls the creation of an XML output with a collection of all the record properties in a specially formatted Object Property File. Choose one of the options listed below:</p> <ul style="list-style-type: none"> • Do not export object property file. • Include object property file as part of the export. • Export only the object property file

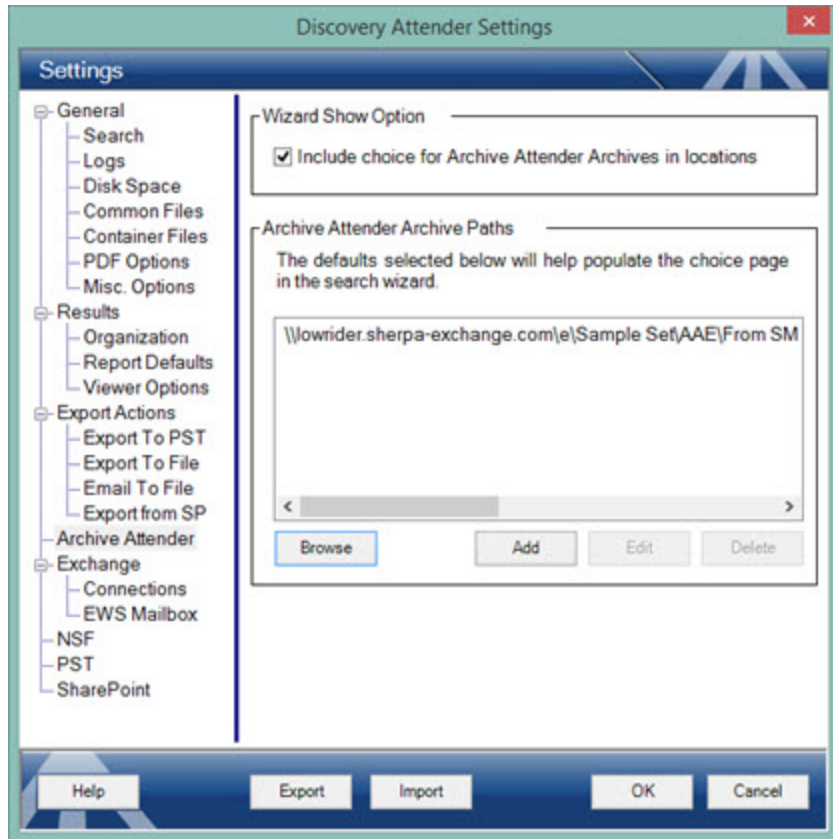
See Also



- [Actions - Copy to File](#)
- [Settings - SharePoint](#)

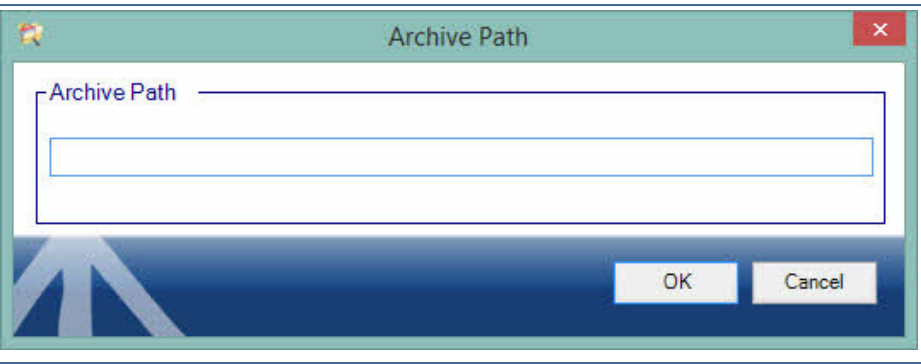

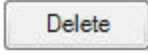
Settings: Archive Attender

This node provides options to search email archives created with Sherpa Software's [Archive Attender](#).

Note: The Archive Attender application has been placed in Maintenance only mode. As such, no new updates to this feature will be included with Discovery Attender.



Wizard Show Option	When enabled, the choice for <i>Archive Attender</i> is shown on the wizard.
Archive Attender for Exchange Archive Paths	This setting stores the archive locations for archive files created with Sherpa Software's <i>Archive Attender</i> . It makes the selection of archives over multiple locations significantly easier. It enables the 'Load' functionality on the Select Archive Users wizard page. That option opens a the dialog box allowing you to select users from multiple archive user locations to help speed up the selection. Use the ADD or BROWSE buttons to choose an archive store to include in the list.
	Opens a browse dialog to choose an archive path from the computer.
	Opens a dialog to add the archive path.

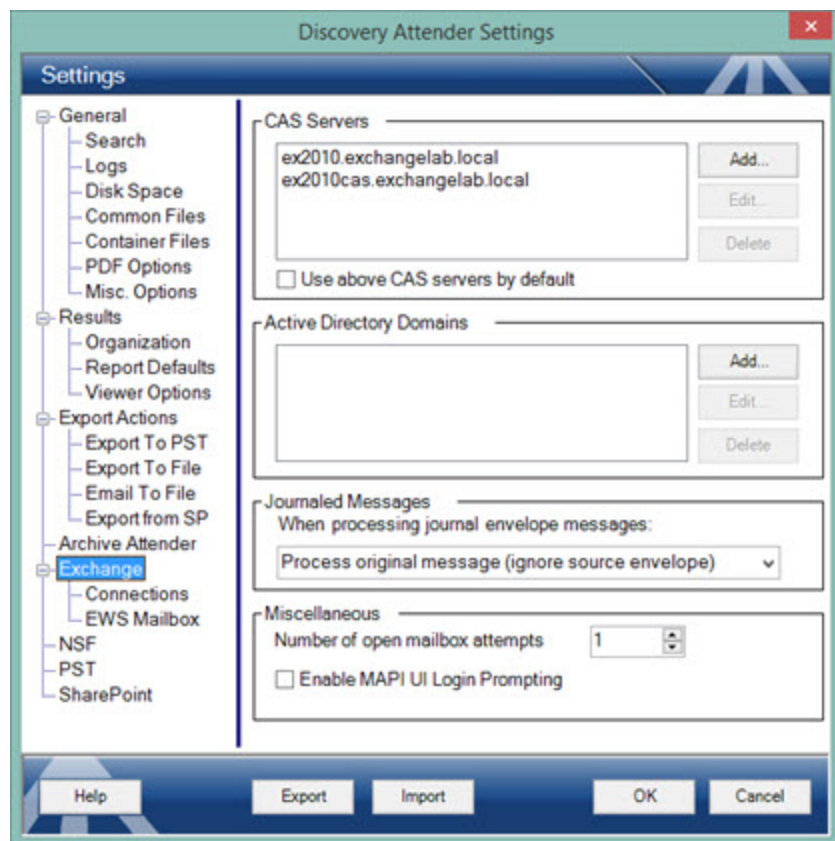
	
	<p>Opens the currently selected path in a window for editing.</p>
	<p>Removes the currently selected archive path from the list.</p>

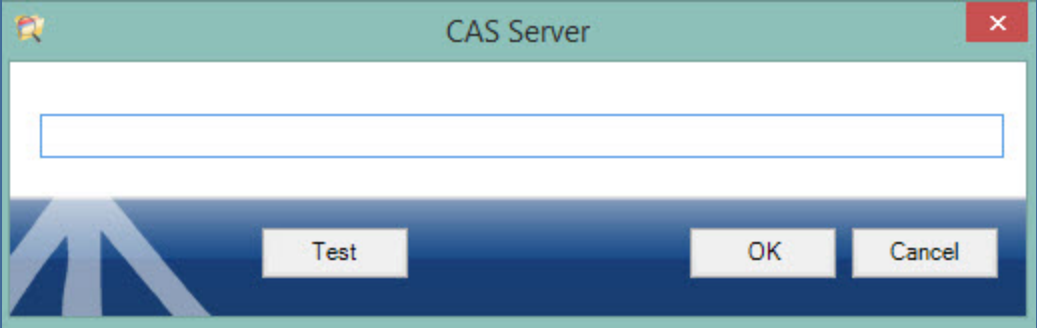
See Also

- [Select Archive Users](#)
- [Archive Attender Summary](#)

Settings: Exchange

These options are for searching Microsoft Exchange data stores directly.



<p>CAS Server</p>	<p>A list of Client Access Servers (CAS) that Discovery Attender will use for connecting to on-premise Exchange servers.</p> <p>This functionality is generally used in older servers and would not be needed if using the preferred Profile method of connection.</p> <p>If your Exchange environment is using CAS servers exclusively, please select the Use above CAS servers by default option.</p> <p>Clicking on 'ADD' will open a dialog box for the CAS server: Please enter the fully qualified name.</p>  <p>Use the TEST button to confirm access to the CAS server. Click OK to save and add the server to the list.</p>
<p>Active Directory Domains</p>	<p>This option sets the defaults for the Active Directory Domains which are useful for searching in various environments which using Active Directory look-ups.</p>
<p>Journalled Messages</p>	<p>On-premises Exchange servers often uses a special format for messages found in or taken from the journal mailbox. Per Microsoft, "A journal report is the message generated by the Journaling agent on a Hub Transport server and delivered to the journaling mailbox. The original message is included unaltered as an attachment to the journal report. This type of journal report is called an envelope journal report."</p> <p>In practical terms searching the journal report, a.k.a. envelope, requires different strategy for locating criteria. Address fields, for example, are modified. In addition, as noted above, the original message is stored as an unaltered attachment.</p> <p>This drop down box gives you the choice of how to process Exchange journal messages:</p> <p>Process as stored: This option will search and export the source journal report as it is stored in the system. The original message will remain as an attachment.</p> <p>Process original message: This option will search and export the original message. The source journal report is ignored.</p> <p>Please note: Full details on journaling format can be found on the Microsoft web site for Exchange 2016, Exchange 2013, and Exchange 2010. Older versions of Exchange are no longer supported by Microsoft. However, Microsoft still provides documentation for Exchange 2003 or Exchange 2007 as those versions had different journaling options.</p>
<p>Mis-</p>	<p>Number of mailbox open attempts: The number of times to attempt to open a mailbox.</p>

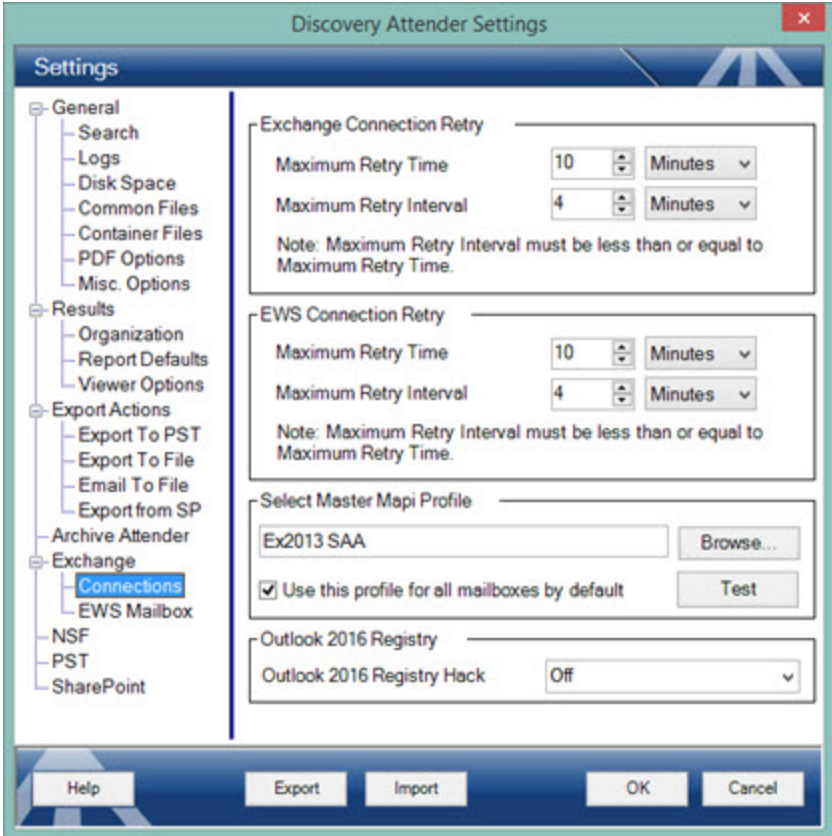
cellaneous	<p>Helpful for instances where a mailbox cannot be opened on the first attempt.</p> <p>Enable MAPI UI Login Prompting: This option should only be used when directed to do so by Technical support.</p>
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See Also

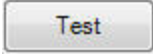
- [Main Console](#)

Settings: Exchange Connections

These options are for setting retry intervals for lost connections to Microsoft Exchange servers.



Exchange Connection Retry	This setting sets the options for attempting to establish lost connectivity for MAPI connections to Exchange servers.
EWS Connection Retry	This setting sets the options for attempting to establish lost connectivity for EWS connections to Exchange servers (e.g. Office 365)
Select Master MAPI Profile	Searching on premises Exchange 2010 or above requires the use of a Master MAPI Profile to ensure connectivity.

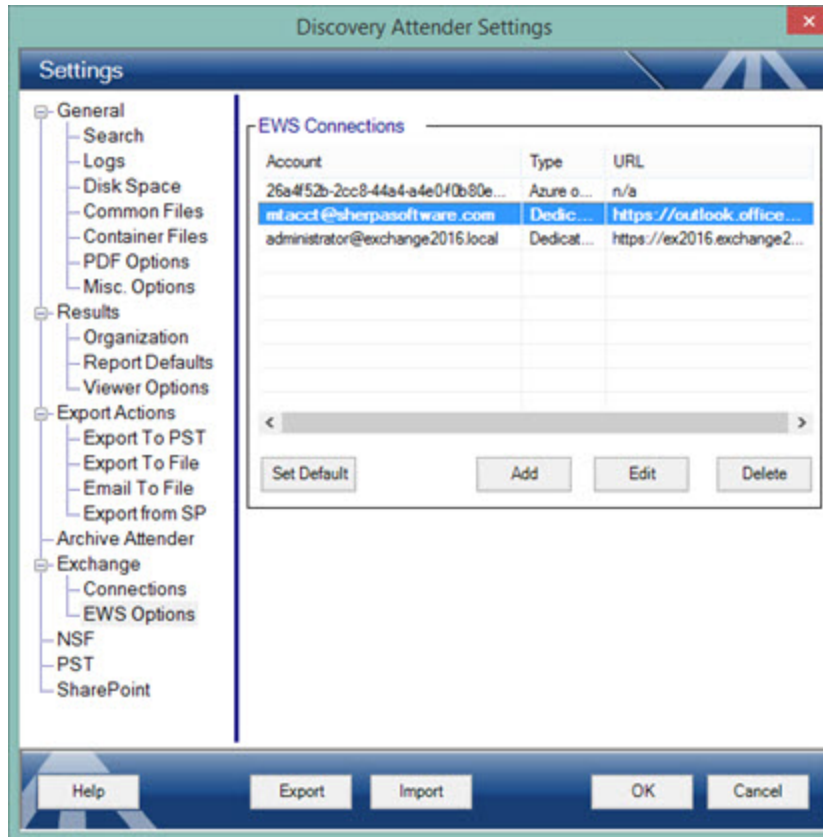
	<p>Click the 'Browse' button to select a profile from the profile list. The profile should have access to the Exchange data stores that will be searched.</p> <p><i>Use by this profile by default</i> This option, when enabled, will use the Master Mapi profile by default. If not checked the Master MAPI profile must be selected for each mailbox that is being searched.</p>
	<p>Tests access to the profile. If this step fails, the profile will not work to connect to the mail stores.</p>
<p><i>Use this profile for all mailboxes by default</i></p>	<p>Enabling this option will ensure all mailboxes are searched using this profile regardless of the options entered in the Search. Use this option if the profile has been validated to open mailboxes in Outlook, but is not working in Discovery Attender.</p>
<p>Outlook 2016 Registry</p>	<p>This option, which is set to 'Off' by default, is used to choose a method of communication calls to make for the registry. Do not change this option unless instructed to by technical support.</p>

See Also

- [Main Console](#)

Settings: EWS Options

Searching mailboxes that use the EWS protocol like those in Office 365 or on premises Exchange 2016 and above require permissions.. This screen allows users to add and store the required settings. More than one account can be enabled, but most users will need just a single account.



Discovery Attender has two methods for searching EWS (Office 365) based data stores. For full information, please check the *Getting Started Guide* found on the product web site.

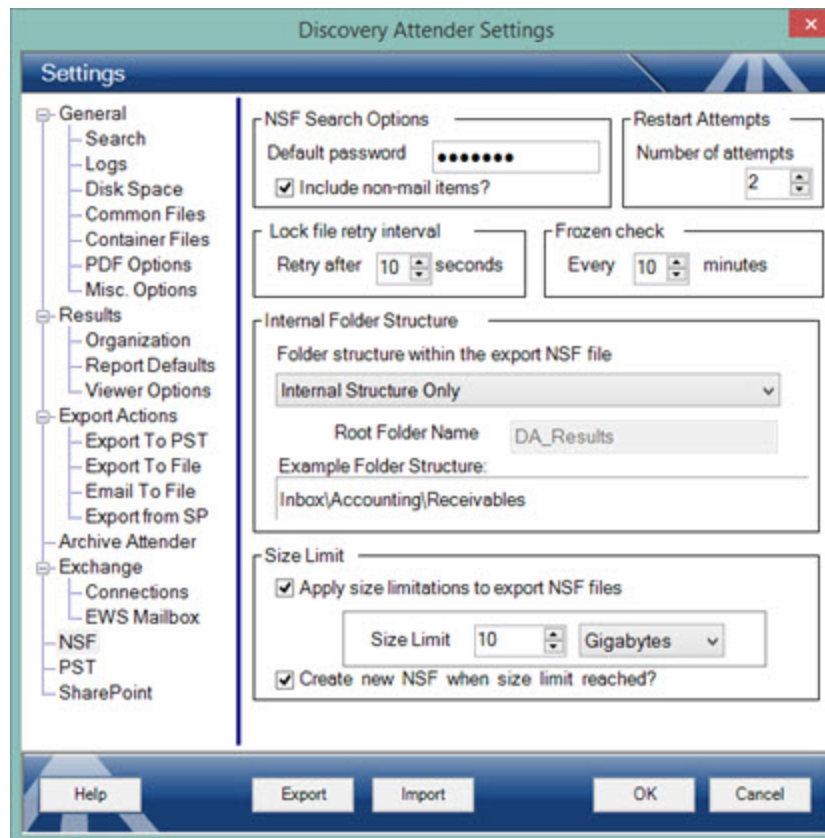
EWS Connections	This section lists and manages the different accounts and credentials .
<i>Account</i>	THE name or identifier of the account credentials
<i>Type</i>	Azure oAuth (aka Modern Authentication) or Delegated (aka Basic Authentication)
<i>URL</i>	If needed, the EWS service URL associated with this account
[Set Default] button	Sets the selected EWS account as the default account, which will then populates various wizard based drop down screens
[Add] Button	Opens the Manage EWS Settings form for users to add a new EWS account
[Edit] Button	Opens the Manage EWS Settings form for users to edit the selected EWS account
[Delete] Button	Removes the selected EWS account from the list

See Also

- [Select EWS \(Office 365\) Data Stores](#)
- [Manage EWS Settings](#)

Settings: NSF

These options are for searching Lotus Notes mail files (NSFs). Aside from the required password, it is a best to retain these default settings unless instructed otherwise by technical support.



NSF Search Option	<ul style="list-style-type: none"> • <i>Default password for Notes client.</i> Enter the password for the Notes client, if any. This will prevent a pop up box from interrupting the search for each NSF task. • <i>Include non-mail items in search:</i> Discovery Attender can only search mail items in NSF files. However, mail can sometimes be found in NSF files that do not use the normal Notes mail template. When enabled, this option allows you to search non-mail Notes files as part of your search. If this option is unchecked, Discovery Attender will first make sure the NSF file is a valid mail file before starting the search.
Restart Attempts	The number of attempts Discovery Attender will make to restart the Notes Client before generating an error.
Lock file retry inter-	The interval Discovery Attender uses to reattempt the search of a NSF file that is

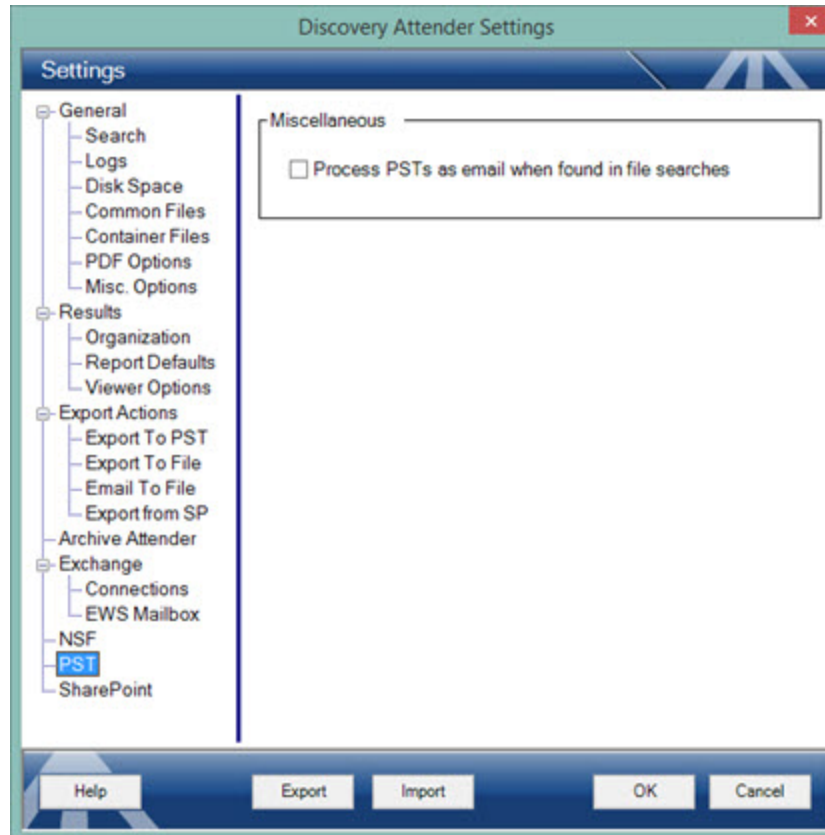
val	already in use or is otherwise inaccessible.
Frozen check	The interval Discovery Attender uses to restart the Notes Client when it becomes non-responsive.
Internal Folder Structure	<p>When exporting message items into a NSF file, the user can choose the internal folder structure for the export NSF . This helps make the output more readable and user-friendly.</p> <p><u>Structure within the NSF for items:</u></p> <ul style="list-style-type: none"> • <i>Root Folder Only:</i> All messages items are copied into the root folder. There is no internal folder structure. The default folder name is "DA_Results" which can be changed by the user. • <i>Internal Structure Only:</i> Recreates the internal folder structure of the source item. If an item was found in 'Inbox\Accounting\2019', the exported message will be found in those folders in the exported PST. This option is the default. • <i>Root Only with Internal Structure:</i> All messages are copied into the root folder using the internal structure of the source item. • <i>Name Only with Internal Structure:</i> Items are exported to a folder created using the name of the source file plus the internal structure of the source item. If the message was in a NSF named 'JohnDoe.nsf', then the exported item will be found in the 'JohnDoe.nsf\Inbox\Accounting\2020' folder in the export NSF. • <i>Full Path with Name and Internal Structure:</i> A folder structure is created using the full path of the source NSF file, plus the internal folder structure where the original message was found. This is particularly useful if retaining structure is important, but you have many sources with the same name. <p><u>Root Folder Name:</u> When using the root folder options, the user can designate a root folder name. The default is "DA_Results".</p> <p>Please Note: A single message item can have multiple folders inside an NSF file. Discovery Attender will copy the first folder.</p>
Size Limit	<p>Enabling the Apply size limitations to export NSF files checkbox allows a size limit to be set when exporting NSF files.</p> <p>If that checkbox is enabled, users can set the size of the export NSF is set under the Size Limit section.</p> <p>The Create new NSF when size limit is reached option specifies whether new files should be created when the size limit is reached. If this option is left unchecked, the export process will simply stop, and no new NSFs will be created once the size limit is reached.</p>

See Also

- [NSF Search Summary](#)
- [Main Console](#)

Settings: PST

PST related settings are located on this screen.



Process PSTs as email when found in file searches.

Enabling this option will create a new search task for each PST found in a file search. It is designed to save time as it allows Discovery Attender to process PSTs with MAPI whenever one is encountered in a File search, even if PSTs are not selected during the search. This has the benefit of including individual email in the result set.

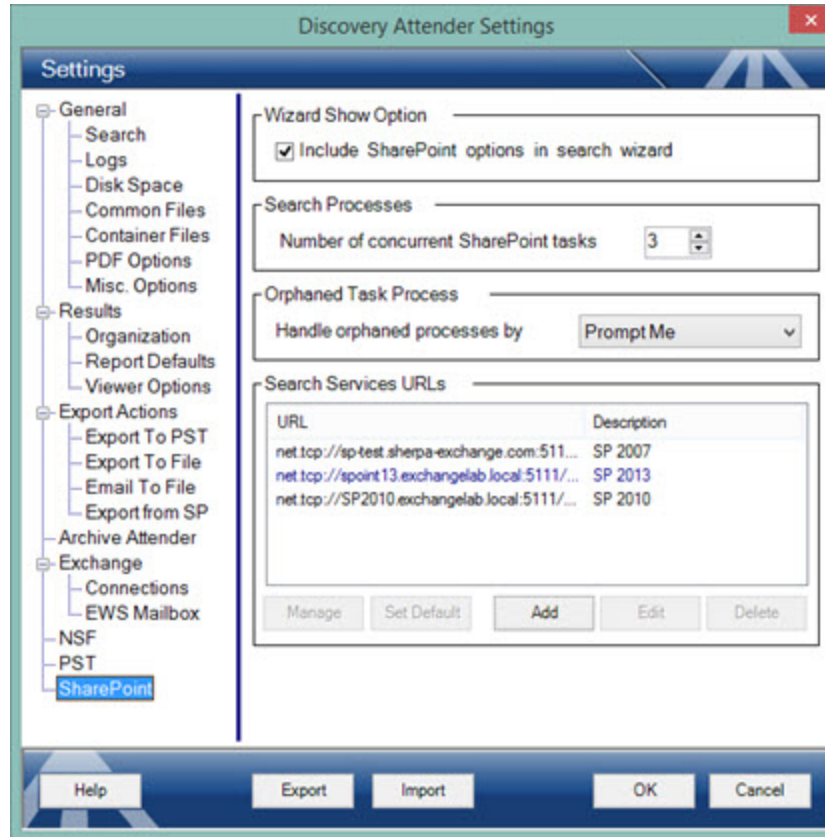
Without enabling this option, individual PSTs found on files shares will likely throw an exception as they cannot be scanned for individual email messages or attachments unless they are listed in the [Select PST wizard screen](#).

If you are searching for email specific criteria (e.g. addresses), it would be better to list the PSTs individually and/or use [custom exceptions](#) for identifying PSTs in file shares.

Note: If you plan on searching file shares that may have PST files, this option should be enabled.

Settings: SharePoint

This screen allows the setting and management of options related to searching on-premises [SharePoint servers](#).



Please note:

SharePoint searching is a separately licensed feature of *Discovery Attender*. For this functionality to work properly, you will need a *Discovery Attender for SharePoint* search component installed on a SharePoint server. Please see [SharePoint Searching](#) for more detail.

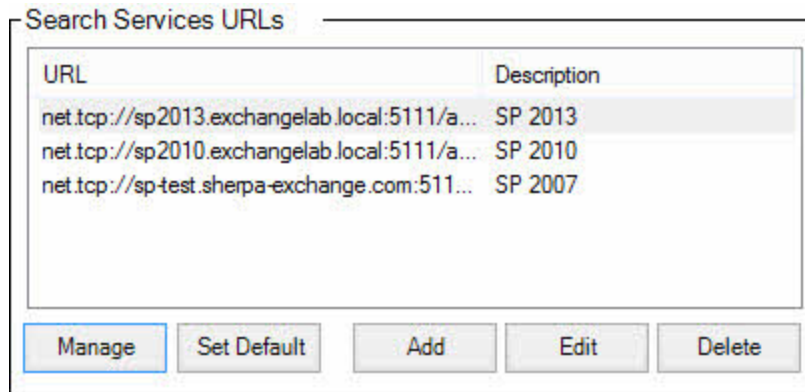
Wizard Show Option	This option will show the Share Point checkbox as part of the Select Areas to Search screen in the wizard.
Search Processes	The number of concurrent SharePoint tasks running locally during a search. Since most of the processing for SharePoint tasks is done on the SharePoint server, there will be no significant load on the local <i>Discovery Attender</i> machine. However, database updates must be queued in conjunction with other running tasks.
Orphaned Task Process	Controls the disposition of SharePoint searches that are unable to complete during the initial task run. Results and log files from tasks unable to complete may remain on the SharePoint component server unless otherwise resolved.

Prompt Me
 Always Delete
 Always Download

- **Prompt Me:** Prompts the user at the opening of a project for a choice
- **Always Delete:** Deletes all orphaned task items from the server without prompting
- **Always Download:** Downloads all orphaned task items to the local machine without prompting. This option is helpful for support, but the results will **not** be included in the search result set.

Search Services URLs

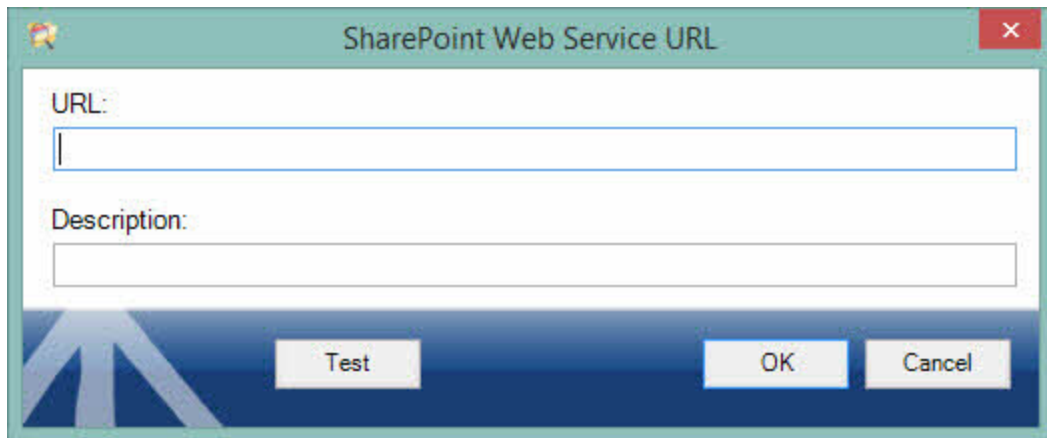
This section lists the available URLs (also referred to as URI) for the SharePoint servers where the *Discovery Attender for SharePoint* components are installed.



This section has a number of features useful for configuring the *Discovery Attender for SharePoint* components:

- **Enter URLs:** Click the **ADD** button to enter a URL obtained from the *Discovery Attender for SharePoint* component on the SharePoint server. This opens the SharePoint Web Service URL dialog box (see below).
- **Set Default Server:** *Discovery Attender* can only connect to one SharePoint URL at a time. Use the **SET DEFAULT** button to select the server.
 Note: The default server is listed in green text.
- **Manage SharePoint Component:** To enable and control server side settings, select a URL from the list, then click **MANAGE** to open the *MANAGEMENT* dialog box (see below).

SharePoint Web Service URL (Add/Edit)

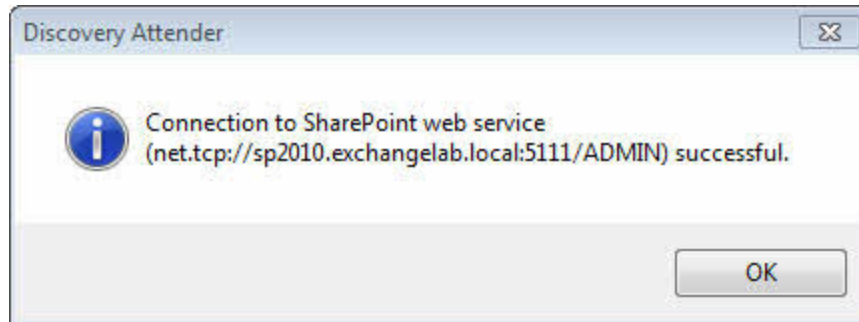


URL: Also known as URI, this is the address of the server where the *Discovery Attender for SharePoint* component is installed.

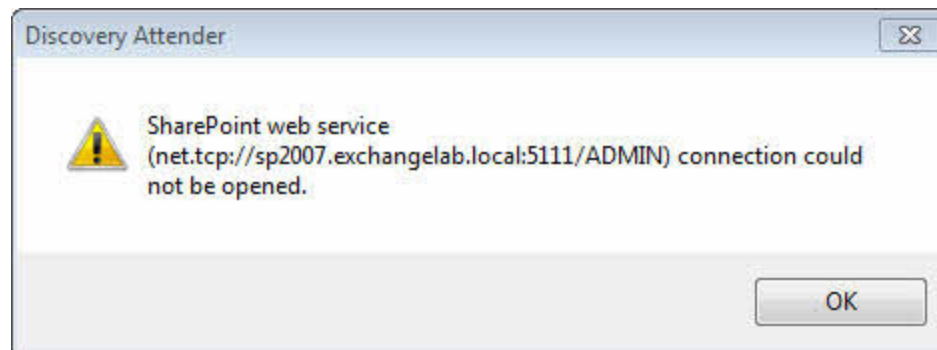
Description: User entered description of the SharePoint server.

To test connectivity and access to the SharePoint server, click the **TEST** button.

If successful, the following dialog will appear:

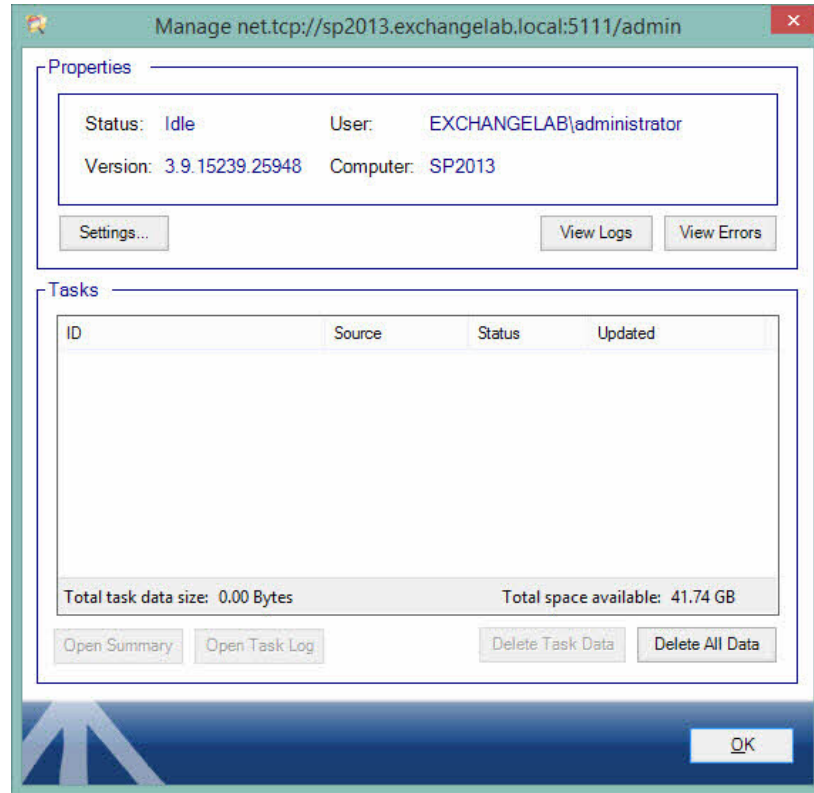


If the connection was not successful, a variation of the following will appear



Manage SharePoint Component (Manage)

This dialog box controls the settings for the *Discovery Attender for SharePoint* component located on the selected server.

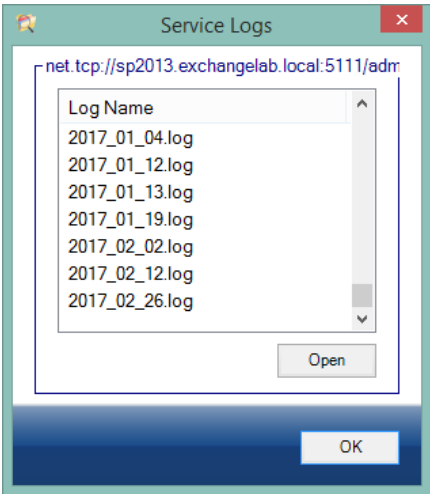


Properties	
<i>Status</i>	The current status of the component followed by the login account of the SP component
<i>Version</i>	Version of the component on this SharePoint server
<i>Computer</i>	Name of the server where the component is installed
<i>Settings...</i>	Opens the <i>SETTINGS</i> window to view, edit or change the default options for the component on this server. Be sure to click OK to save any changes.

Error Logging	Click Debug to include additional information in the task log files.
Search Processes	Number of processes (tasks) to run concurrently on the server. Please note, this is the Server Side option. Task processing may be limited by the settings chosen on the local <i>Discovery Attender</i> installation.
Task Speed	Rate (throttle) for the tasks process on the server. If the server is dedicated to the <i>Discovery Attender</i> component, feel free to increase the processes. However, if the component server also handles other tasks, this is the best place to throttle the task speed to use fewer resources.
Communication Timeout	Amount of time that the task coordinator should wait for a response from the individual task.
Memory Limit	Size limitation that a file will be searched in memory. Files exceeding this limit will be searched as files, not as bit streams.

View Logs

Opens a dialog box listing the log files on this server:



Select a file, then click **OPEN** to view the server log file for that day.

View Errors

This allows t any errors listed on the SharePoint server to be viewed.

Tasks

This section lists and manages the tasks either currently running, or orphaned from a previous search, on the SharePoint server.

ID	Unique identifier for this task
Source	Machine which created this search task
Status	The current status of the task
Updated	Last time the task was updated
<input type="button" value="Open Summary"/>	Opens XML summary for this task
<input type="button" value="Open Task Log"/>	Opens task log file for the listed task, if available.
<input type="button" value="Delete All Data"/>	Deletes all data associated with the selected task. Note: Don't use the delete functionality on active tasks.
<input type="button" value="Delete Task Data"/>	Deletes all task related data from the server. Note: Do not use this functionality when active tasks are running.

See Also

- [SharePoint Summary](#)

Information Resources

There are a number of information resources available in this Help document. Please click on the links below to explore some useful articles.

- [Best Practices](#)
- [Glossary](#)
- [General Information](#)
- [Tips & Tricks](#)
- [Troubleshooting Guide](#)

Discovery Attender Best Practices

Here is some advice collected from the *Discovery Attender* team and key customers for best practices for running searches and producing results.

1) Always Run a Sample Search

Search a small data set before running a complete search over multiple stores. This will save time and frustration in the long run. Benefits include:

- Ironing out any difficulties with permissions or criteria.
- Testing and verify complex keyword criteria works as intended.
- Identify false positives and causes for them.
- Estimate the size of your result set. If you anticipate more than 350,000 results, break up your search into smaller, logical pieces.
- Get feedback from the sample result set and test again before committing a search on a large data set.

2) [Keyword Considerations](#)

- [Exclude the file types](#) that *Discovery Attender* cannot digest for keywords. This will speed up your search and eliminate false positives in attachments and files.
- Learn to use the [Keyword Tester](#) for long search expressions or confusing word lists.

3) [Cache During Search \(CDS\) Considerations](#)

- CDS is meant to have a local cache of the result items. It is **not** meant to be the export format. Use it only if you will not have access to the source data at a later point, or if you want to keep your results with the project.
- CDS does slow down the search, but it takes a bit less time when exporting results.
- Run a sample search to estimate size of the storage cache to ensure you do not run out of hard drive space.

4) [Exchange Dumpster Considerations](#)

- Use the [PreSearch Tool](#) to copy *Dumpster* items to PST. This will ensure you have a copy of the Dumpster data that will not be affected by retention policies. Your search of local PSTs will also be faster than searching network Exchange servers.
- Make sure you test Dumpster searches and exports on your Exchange server before deploying this feature as part of your process.

5) [Date Options](#)

- Don't use the Attachment Creation and Modification dates criteria as they are set inconsistently. Some mail systems will set the attachment dates from the file dates, others the insertion date. Use [Source Message Date](#) option instead.
- Avoid using the *Creation* and *Modification* dates as date filter criteria for messages unless you have direct access to the original content in the original mail store (i.e. Exchange). The *Creation* and *Modification* dates of individual messages are highly dependent on the mail store and export methodology. The export mechanism may not be known, or controllable (e.g. PSTs provided by another department or client). It is best to use the reliable Sent and Received dates as your [Message Option](#) defaults.
- When searching file shares, keep in mind that when files are copied using many common programs (e.g. Windows Explorer), the *Creation* date gets changed to the date the item was copied. Because of this, we recommend only using the Modification dates.

6) [Dealing with Privileged Data](#)

- Use the [Automatic Label](#) features with the *Keyword OR Address* option selected to label your data as privileged within the result set. You can then ignore those items to exclude them from your production.
- Alternately, use the [Advanced Filter](#) to search within your result set.

- Use proximity searching for names in the body of documents. If you are searching for Tom Sawyer, it may appear as 'Tom Sawyer', 'Thomas Sawyer', 'Sawyer, Tom ', or 'Tom B. Sawyer'. Because of this the best way to find all instances would be *{Tom* OR Thom*} NEAR Sawyer*.
- See [Searching Privileged Data](#) for more information.

7) Set size limitation for Export PST and NSF files in line with your production media

- Know the size limitations of your export media and adjust the PST or NSF size accordingly. To ensure the PSTs fit, go to *Tools | Settings | Export to PST*. Under size limitations, check '**Apply size limitations to exported PST files**'. Enter the appropriate value for the **Size Limit**.
- Keep in mind that smaller PSTs are ideal for many reasons. Even if your PST will fit into a larger medium, it is a good idea to keep the size under 2GB for performance purposes.

8) Produce reports with your results. Your end-user will thank you.

- *Discovery Attender* has a number built-in reports with the [Summary](#) and [CSV List Report](#) being the most popular. Include at least one of these reports with your production data set to assist the end user.
- Keep in mind the back-end database if fully accessible for detailed reporting.

9) Attend a training session

- On-line training sessions are included with active maintenance. If you are new to *Discovery Attender*, be sure to attend the introductory New Customer Training for tips, tricks and pointers. Other sessions on specific topics are on an ad hoc or scheduled basis.
- Tutorials and other helpful documents can be found on our [website](#).

10) If you have questions or concerns, [contact Tech Support!](#)

See Also

- [Tips & Tricks](#)

Glossary of Terms

Action

A user initiated event performed on the result items after a search has completed. Actions give users the flexibility to organize, group, and export result times. Actions include Copy to File, Copy to PST, Deduplication, Label, Mark etc. See [Result Actions](#) for more details.

Address Type

Email Addresses come in many different formats depending on the email system that originally created, transported or last modified the message. This field gives a representation of what format that address may be. For example, EX designates, Exchange, SMTP is Internet, NOTES as Domino Lotus Notes.

Alias

Unique nickname for a mailbox in a mail store. E.g. WMOZART. See [Display Name](#) and [Distinguished Name](#) for more detail on mailbox or address names.

Annotation

A detailed comment or note entered by the user. Notes can be added at the search or individual result level. In addition to the notes, the username, computer/machine name, and time the note was added are also stored. See [Annotation](#) for more details.

Application Log File

File containing the details for each installations actions. The files are named with the machine name and current date. If a file grows too large, a new one is created. All application related error messages are logged here. The most recent or current day's Application Log File can be reached from many screens by right-clicking and selecting 'Open Application Log', or double clicking on the status bar from the Main Console.

Attachment Source Message

Message which encapsulates an attachment. When an attachment result item is exported, it is the source message which is actually exported. Keep in mind that the Source Message of the attachments of embedded messages will always be the message at the root of the message tree, i.e. the one which you would see in the mail store.

Branch Expression

Portion of a keyword search expression delineated by inequality signs (i.e. < or >) for reporting purposes. Without the delineators, Discovery Attender can not distinguish which portion of a keyword search expression to use in reporting.

Context Menu

Menu reached by Right-Clicking your mouse button in the appropriate area. These menus usually contain additional choices to manage or view data in the relevant screens.

Cache During Search

Option available in the Search Wizard Result Options screen. Allows the user to create a copy of message and attachment results into the local project directory as the search is being run. This option is recommended for people who will not have access to their source data at a later point, or suspect it may be deleted. It tends to add considerable time to a search. This option is only available for message and attachments result types. For more detail, read this helpful [page](#).

CSV File

A common type file type which can be opened by most spreadsheet programs such as Microsoft Excel. In Discovery Attender, most lists can be exported to CSV format using the Right-Click Menu. Discovery

Attender uses specially formatted CSV files for many tasks including loading import lists and bulk database loads.

DA.mdb

Database which contains the data for a given search, including search criteria and all result properties. There is one database per search. The database is in Microsoft Access format, and is fully accessible for reporting. Contact [Technical Support](#) for further details.

Data Store

Computer based storage location for source items. included in a search. Discovery Attender can scan five types of data stores: Microsoft Exchange Mailboxes, Public Folders, Outlook Personal Folders (PST files), Archive Attender archives, and file paths.

daDetail.mdb

Database which contains keyword and address details kept for reporting purposes. There is one detail database per search.

daException.mdb

Database which contains details about any exceptions (skips, errors or warnings) which occurred during a search. It is used to populate the Combined Exception Logs.

daProcess.exe

Name of the application file which runs the actual search process. One instance is created per task in a search

Deduplication

Deduplication (or Deduping) is the process of removing duplicates from a result set. For example, if Person of Interest A sends an email to 5 people, and all their mailboxes are searched, there will be 6 copies of that relevant email in the dataset. Discovery Attender helps reduce the number by allowing the user to select the criteria for an item to be considered a duplicate. A process is then run to identify the duplicates by comparing properties against one another and creating sets accordingly. Deduplication in Discovery Attender is strictly a database exercise, no items are modified or deleted from your result set.

Discovery.exe

Name of the main Discovery Attender application file.

Display Name

The visible portion of an address attribute for an Exchange Mailbox or Address field. E.g. "Wolfgang Mozart".

Distinguished Name (DN)

The unique identifier used to process mailboxes and addresses within an Exchange Mail Store. E.g.
/o=FIRST ORGANIZATION/ou=FIRST ADMINISTRATIVE GROUP/cn=RECIPIENTS/cn=WMOZART

Dumpster

Also known as the "Recover Deleted Items" folder, the dumpster is essentially a Recycle Bin for Exchange. For items to be copied into the dumpster folders, the "Retain deleted items for X days" feature must be enabled for the mailbox or public folder store on the Exchange server. If enabled in Exchange, each folder will keep deleted items in the dumpster for a pre-specified period of time. Public Folders also have dumpsters. Please be aware that Discovery Attender cannot search folders in dumpsters. PST files do not have Dumpster folders.

GUID

Globally unique identifier – a unique character number string which is used to uniquely identify individual elements in Discovery Attender. Examples include Search GUID, Result GUID, Task GUID etc. Project folders, exported message files, and log files are often named with a GUID to prevent duplicate entries and provide for efficient program look ups.

Hash

A small, fixed-length, digital footprint created using a mathematical algorithm. Hashes are often used for item validation and deduplication as any changes in input values (i.e. different files or messages) will produce divergent hash values. Hashes are stored in the database with 64 bit encoding, but are displayed as a 32 bit hexadecimal.

Hit

(v) to match the search criteria or (n.) an item which matches the criteria of a search. A responsive item.

Internet Header

Portion of a message which details network paths taken between sender and recipient. Discovery Attender uses 'Internet headers' specifically to define the PR_TRANSPORT_MESSAGE_HEADERS field. Please Note: Not all messages contain Internet headers, especially those sent between persons on the same server pre-Exchange 2007.

Label

A user created tag to describe an item. There can be many labels per item and many items per label. The By Label node in the Results Screen shows the items and their associated labels

Leaf

Individual keyword or phrase in a search expression or list of words. For example in the search expression "Book Report" AND (lion* OR tiger OR bear), the leafs would be: "Book Report", lion*, tiger, bear.

Like Pattern

A syntax used by Discovery Attender to tell the engine to evaluate wildcards which appear within the Like("") holder. More information can be found in [Pattern Matching](#).

Lotus Notes

A multi-user client-server database application that incorporates email and calendaring amongst other functionality. Starting in version 3.7, Discovery Attender supports the searching of Notes mail files, and mail found in other files. However, non-mail items from other Notes applications are ignored.

Mark

One of five default symbols used to associate an icon to a result item. Each mark (or icon) can be defined by the user. There are ten marks which are listed in the [Settings](#). There users can add text descriptions to describe the individual marks. Marks are set in the Results screens using the context (right-click) menu. Alternately, the first five marks can be set using the function keys F6 through F11.

Master MAPI Profile

The profile required to search later versions of Exchange 2010 and above. This profile should have access to an Exchange account with administrator privileges.

Note: This profile is not required for searching earlier versions of Exchange.

MD5 Hash

Type of hashing used in Discovery Attender to assist in deduplication. Files results are hashed in place on the file systems. For Attachment results, Discovery Attender will attempt to hash an attachment in place as a byte stream. However, if the attachment is too big, it will be saved to the file system and hashed there. Embedded messages cannot be hashed. Three hashes are stored for Message Results, one for each of the available body fields (Plain Text, RTF and HTML).

Message Class

A MAPI property that is used to identify the type of message document to help with the display and processing of the item.

Metadata

Properties of result items which are 'data about the data' stored as part of a result item. The properties available for each item varies according to its type. Messages, for example, have Sender, Sent Date, and Subject amongst its metadata, while a .jpg file may have information about the image width and height.

MSG File

A file format used to store email messages individually. Considered the native format for individual email messages for Microsoft Outlook. All email properties including dates, recipients and attachments are stored within the file.

Pointed Location

Place where an individual result entry looks for the actual item (a message or attachment source message) to perform actions. The default is the original or Source Location. However, if the user chose Copy During Search when creating the search in the Search Wizard, the result items of that search will point to a local copy of the messages. These messages are stored under the project directory and will be immune from any changes to the original messages.

Project

Discovery Attender storage unit for a group of related searches. A project consists of a project directory which stores the searches and their related information including databases and log files and a project file which gives detail about the project itself.

Proximity Searching

Type of search that finds a match based on the distance one word or phrase is from another word or phrase. Discovery Attender uses the reserved word NEAR to define a proximity phrase, e.g. University NEAR Penn* . The limitation of proximity searching is 99 words (e.g. bank* NEAR(99) asset*)

PST File

A local personal folder used with Microsoft Outlook to group, store or archive email items. Also known as Personal Storage Table, Outlook Data Files or Outlook Personal Folder Files. PST files are the native format for Microsoft Outlook.

Result Entry

The detail or record for an individual entry of a Result Item which matches the criteria for a search. The Result Entry is stored in a Discovery Attender database and stores some properties of the Result Item, including its location, dates, size and unique identifiers to find it again.

Recipient

Addresses where email was delivered. They cover the To, CC (Carbon Copy), and BCC (Blind Carbon Copy) fields.

RegEx Pattern

A syntax used by Discovery Attender to tell the engine to evaluate the expression which appears within the RegEx("") holder as a Regular Expression. More detailed information with examples can be found in Pattern Matching.

Regular Expression (a.k.a RegEx)

A pattern matching language with advanced syntax utilizing symbols and wildcards to match patterns and describe conditions in text. Discovery Attender uses the .Net 2.0 flavor of Regular Expressions. In Discovery Attender these patterns are identified by using the RegEx keyword token.

Result Item

The actual item, either a message, attachment, file or directory which has matched the search criteria. The actual item is not stored in Discovery Attender, but the details and metadata of this item are stored in the database in the form of a Result Entry.

Search

A query or filter customized by the user to locate specified data using a defined set of criteria to create a set of results. A search consists of criteria (keywords, addresses, dates, etc.), options, and locations (mailboxes, PSTs, file sources) to be searched. In Discovery Attender, these queries are created using the Search Wizard which can be started from scratch, copied from an existing search, or loaded from a Template.

Search.XML File

This file is used by task process component while processing searches. Although this file cannot be transferred, it is useful for debugging purposes. The contents of this Search.XML file appear in the Task Logs if the search is run in Debug Mode. See template for a file which can be used to save and load searches.

Search Again

This functionality is used to create a new search wizard by copying an existing search in the Main Console. The new wizard will be populated with all details from the source search including criteria, conditions, locations and settings, If needed the user can modify any these details in the search wizard. However the revision number will be incremented and scheduling details will be set to the default unless changed by the user.

Search Wizard

Series of screens to help guide a user through the setup of a search. Most screens are dependent on the selections of the previous screens. The user can create a New Search from scratch, or they can use an existing search as a template by selecting Search Again

SharePoint

A web based solution created used for document sharing, workflow collaboration and various internal web applications. Starting in version 3.7, Discovery Attender supports the searching of files stored in accessible SharePoint repositories.

Source Location

The location where the result item was found when the search was run. This location can be an Exchange Mailbox, Exchange Public Folder, a PST file or a file Path.

Source Message

See Attachment Source Message.

Task

An individual processing unit of a search, one is created per location selected in the Search Wizard. A task is the search performed against an individual Mailbox, a set of Public Folders, an individual PST or a File Path.

Task Log File

File containing the details reported for each task. The files are named with the unique task GUID. All task related error messages are logged here during the search. A brief search criteria is also entered into the log upon task startup. The task log files for completed tasks can be reached by double-clicking on any of the location or task items listed in the main console or Results.

Template

A file containing details about a search used to save a search independent of the local databases. They are often used to create new searches between projects or different installations of Discovery Attender. A template can be saved from a Search Wizard or an existing search. The file extension for a template is .dast. By default, templates are saved and loaded from the Templates directory under the main product installation.

Token (Folders)

A token is a predefined mail folder name which corresponds programmatically to the given folder. In Outlook, the visible name of the folder is set based on what language the client is set in. The token helps you find one of the predefined folders (Inbox, Drafts, Sent Items, etc.) regardless of the localized language of that folder. For example, %Sent-Items% will match the Sent Items folder if it is in English (Sent Items) or French ('Éléments envoyés') or another language.

UNC Path

Universal (or Uniform) Naming Convention is a method of rendering a file path which shows the complete qualification including computer/machine name, resources and folders. It allows any machine in a network to locate a path, regardless of drive mappings. For example, a Mapped drive may look something like M:\MyFolder\Data\ a UNC path would be rendered: \\MyComputer\MyResource\MyFolder\Data\.

Wildcards

Characters or symbols in keyword criteria which are interpreted as a pattern. For example, in the keyword: boat*, the asterisk tells the search engine to search for the word boat with zero to many characters on the end. It will then find the following: boat, boating, boats... See Pattern Matching for more detail.

General Information

This section provides useful articles about various Discovery Attender topics. They include:

- [Import File Formats](#)
- [Pattern Matching](#)
- [PST Limitations](#)
- [Result Caching Options](#)
- [Search Term Clarification](#)
- [Supported File Formats](#)

See Also

- [Information Resources](#)

CSV Import File Formats

The wizard screens which allow the user to add locations to the search offer an option to import a list of search locations.

- [Mailboxes](#)
EWS Mailboxes
- [PST Files](#) , NSF Files
- [File Paths](#) , MSG File Paths

The following describes the format to be used when importing lists to the Discovery Attender Search Wizard.

Mailboxes

Import files are [CSV](#) format only with tab delimiters.

Format	<i>Display Name <tab> Server <tab> Legacy Distinguished Name</i>
Header	"Display Name" "Server" "DN"
Example	"Tom Sawyer" ""HomeServer"" "/o=Firm/ou= First Admin Group/cn=recip/cn= tsawyer"

EWS Mailboxes,

Import files are in TXT or [CSV](#) format only with tab delimiters.

Format	Header double quote delineated (tabs for CSV) with the following fields: User Account: Mailbox to search Password: If used, the password for the mailbox. Note, If the EWS accounts are searched with impersonated credentials, this field is not needed. Impersonated Account: The account which has the requisite permissions to search the user account enabled in the Settings .
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	Type: Impersonated, Default or Direct - the type of account used to connect to the EWS store.
Header	"User Account" "Password" "Impersonate Account" "Type"
Example	"suser@sherpasoftware.com" "" "Test@sherpasoftware.com" "Default"

PST Files

Import files can be in [CSV](#) or TXT format. This same format can be used to import NSF files.

CSV (Tab delimited only)

Only the first two columns in the following format will be read from the CSV file.

Format	<i>PST Name <tab> File Path <tab> Size <tab> Type</i>
Header	"File Name" "Path" "Size" "Type"
Example	"AuntPolly.pst" "c:\myfiles\samplepsts\" "48.45 MB" "Unicode Format"

Text (.txt) File

The text file should consist of a list of PST file names and paths, one path per line:

Format	<i>File Path\PST Name</i>
Example	c:\myfiles\samplepsts\hfinn.pst c:\myfiles\samplepsts\Sawyer, Tom.pst c:\myfiles\samplepsts\bthatcher.pst

File Paths

Import files can be in [CSV](#) or TXT format. This same format can be used to import MSG File Paths.

CSV (Tab delimited only)*

The import function assumes the CSV file will be of the following format.

Format	<i>File Path<tab> Subfolders</i>
Header	"Path" "Subfolders"
Example	"c:\myfiles\HR" "Yes" "\\myserver\sales\2007\Q1" "No"

Text (.txt) File

The text file should consist of a list of paths, one path per line. **The format assumes that all subdirectories will be searched.**

Format	<i>File Path</i>
---------------	------------------

Example	c:\myfiles\budget c:\myfiles\HR \\myserver\sales\2007\Q1
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Notes on CSV Files

- The first line of the CSV file is assumed to be the header and must follow the header format
- If there are commas **within** a field then they should be surrounded by double quotes. For example (PST): " Thatcher, Becky.pst", c:\myfiles\samplepsts\

Pattern Matching

Discovery Attender provides options for users to enter expressions which are more complex than a standard exact search match. Patterns can be used to help evaluate keyword, address, file name and folder criteria.

Two types of Pattern Matching: [Like Patterns](#) and [Regular Expressions](#) (RegEx) are supported by the search engine. In addition, Discovery Attender includes selected expressions designed to locate specific data using commonly found patterns (the [PATTERN](#) keyword), or locating items that do not have Extensions ([EXT \(NONE\)](#)).

Like Patterns (Wildcards)

Whenever you use a [wildcard](#) to expand a keyword search term, you are actually using a Like Pattern. Discovery Attender automatically evaluates any word or phrase containing wildcards as a Like Pattern for use in the engine. However, the user does not need to enter exact syntax (i.e. the [Like\(""\)](#) portion) into the wizard. For example, use of **day** is valid as is the equivalent syntax [Like\("**day**"\)](#).

The syntax for a Like Pattern is [Like\("expression"\)](#) where the *expression* is the word or phrase, containing wildcards, you wish to evaluate.

NOTE: when using a multiple word phrase in a search expression, it is required to deploy the LIKE keyword. For example, *"stock market*" AND steak* will not find the term *stock markets*. This is because double quotes around a wildcard has the program thinking you need to find the actual wildcard (in this case the asterisk). Rather, to work correctly the expression should be [LIKE\("stock markets*"\) AND steak](#).

Another thing to keep in mind is that wild cards need to be placed correctly after the root of the word you seek. If you are looking for **Agency** or **Agencies**, use the wildcard after the 'c', e.g. *Agenc** not *Agency**. If you want any of those options plus **Agent**, then use *Agen**.

Supported Wildcards

*	Matches none, one or more characters.
?	Matches any single character
#	Matches any digit
[,]	Matches a range or set of characters or numbers

All the wildcards are reserved and will be translated as a pattern. If you wish to use one of the wildcards as a literal match, be sure to put it in double quotes, e.g. **"# sign"** will find a hit in the phrase *Press the # sign for more options*.

Examples

Expression	Matches
bicycl*	bicycle, bicycles, bicycling
river?boat*	river boat, river boats, river boating, but NOT riverboat
Version 3.#	Version 3.0, Version 3.1, Version 3.101

Regular Expressions (RegEx)

In addition to the standard wildcard support with Like Patterns, *Discovery Attender* also supports the complex structured pattern language of Regular Expressions, a.k.a RegEx, or, less accurately, GREP. Regular Expressions are very helpful when trying to match patterns that cannot be done with Boolean operators such as account numbers, credit card numbers, social security or national insurance numbers.

This help document is not intended to teach you how to use Regular Expressions, a certain amount of knowledge is assumed before you can use them in a search. There are entire books written on the subject and innumerable sources to be found on the Internet to help you create the ideal Regular Expression.

Discovery Attender does provide testing tools to help craft your expression. In fact, using the [Keyword](#) or [Address](#) testers to validate your regular expression is **highly recommended** before including it in your search.

Keep in mind that the *Discovery Attender* search engine is comparing an entire field (body, subject, label etc) against the expression, so make sure it is flexible. Many examples in online Regular Expression libraries cater towards matching an entire field, not a section of a document.

Discovery Attender uses the .Net flavor of RegEx. The syntax is: **RegEx("expression")** where **RegEx("")** tells the search engine to analyze and return items that match the *expression* within the quotes.

Examples

Expression	Finds
RegEx("(?!000)([0-6]\d{2})7([0-6]\d 7[012])([-]?)(?!00)\d\d3(?!0000)\d{4}\b")	Social Security numbers (just the numbers using allocated limits)
RegEx("\d\d\d\d[-]\d\d[-]\d\d\d\d")	Social Security numbers (with ### # #### or ### ## #### pattern)
RegEx("(cc credit\s{0,3}card)?[\D]{0,60}\d{4}([\D]?\d{4}){3}([\D]?\d{3})?\d{4}[\D]?d{6}[\D]?d{5}([\D]?\d{4})?")	Credit Card patterns with several allocated numbers.

For more information on how to deploy regular expressions to find Personally Identifiable Information (PII) or Payment Card Industry (PCI) data please see the [Searching for PCI & PII Data](#) article.

PATTERN Reserved Word

Discovery Attender has a method for finding certain predefined formats such as credit card and social security numbers in text using the PATTERN reserved word. When used as a keyword, the PATTERN(CC) or PATTERN(SSN) uses a regular expression combined with programmatic testing (including the Luhn algorithm in the case of credit cards) to find matching hits while reducing false positives (but not necessarily eliminating)

Expression	Finds
PATTERN(SSN)	Social Security Numbers (just the numbers using allocated limits)
PATTERN(CC)	Credit Card numbers
PATTERN(SIN)	Matches Canadian Social Insurance Numbers

EXT(NONE) Reserved Word

Used only in the File Names and Types criteria, the EXT(NONE) reserved word helps locate or exclude files that do not have an extension.

See Also

- [Choose Keywords](#)
- [Choose Addresses](#)
- [Searching for PCI or PII Data](#)

PST Limitations

Outlook 97 to 2002

- 2 gigabyte max file size (practical limit 1.8 gigabytes)
- 16,383 /65,535 items per folder
- 16,383 /65,535 folders per PST
- Large table support must be enabled to reach 65,000+ item count

Outlook 2003 supports two PST storage formats

- Outlook 97/2002 Personal Folders (see above for limits)
- Office Outlook Personal Folders File - Introduced with Outlook 2003
- 20GB default file size with caveats:
- PST size is limited to space available on partition or drive.

- Microsoft does not recommend exceeding 80 gigabytes.
- ~ 65,000 items per folder limit.

Please Note

Outlook 2002 and below cannot read Outlook 2003 format. If the installed client is Outlook 2002 or below, then:

- Discovery Attender cannot search PSTs stored in Outlook 2003 format.
- Discovery Attender cannot export to PSTs in Outlook 2003 format

Caching Results

During a search, users have the option to create a local copy of results that match the search criteria. This caching feature is enabled on the [Result Options](#) page of the search wizard. Having a local copy of the data is beneficial in the following situations:

- Access to the source data stores will be limited or non-existent at a later time,
- Data may be deleted from source data stores before there is a chance to perform an export.
- The integrated Text Viewer is used heavily for review or quality control.
- You are collecting data at a one location, but will process it in a different location.

Caching is not recommended or not needed in the following situations:

- There is limited Hard Drive space on the machine where the project is located. All cached items are copied to folders located under the unique search guid under the project structure.
- Source data is static and will not change between the time of search and the time of export.

Note: The caching option is intended to create a local repository of the data under the project file structure. It is not intended to be the final action for these items. Using the [Actions](#) will allow you far more flexibility in with result names and locations

Data is stored locally in the following manner:

- For all **Exchange based data stores** (Exchange Mailboxes, Office 365 Mailboxes, Public Folders, Online Archives, PST Files, Sherpa Archives, etc.), a single .MSG file is created for each message and each attachment hit. These files are given the [unique result guid].msg as a name. All cached message or attachment results are saved into the '*Messages*' directory under the parent search folder.
- In the case of **attachments**, the source messages for attachment hits will be stored for each hit to maintain the context and metadata. If you have multiple attachments hits from the same source message or if an attachment and source message both hit, you will still have one file for each hit.
- **File** results from network shares and hard drives are saved in the *Files* directory under the parent search directory. All files are renamed [result guid].[file extension] This helps to locate the correct file when opening and copying.
- For files hits which are found in **compressed container files** (i.e. .zip, .tar, etc.) the source container file will be copied, just once, no matter how many compressed files stored within that container match the criteria.
- For messages originating from an **NSF mail store**, one NSF file is created in the '*Messages*' directory per task. All result items are copied into the appropriate NSF file.

- For **.EML files** found on local or network drives, the entire file is copied to the *Messages* directory under the parent search folder and given a name of [result_guid].eml
- For **.MSG files** found on local or network drives, the entire file is copied to the *Messages* directory under the parent search folder and given a name of [result_guid].msg
- All results collected from **Office 365** are cached automatically to maximize efficiency and minimize lag time due to slow connection speeds for actions and previews.

When items are cached, the result data no longer points to the original source item. All actions, therefore, are taken against the local copy of the message or attachment.

Certain items cannot be cached to do size or technological limitations. These items (see below for a partial list) will still be returned as results. However, a 'Warning' exception will be created in the log file and the pointed location (i.e. The location where the item will be copied from for export) will default back to the original data store source location.

- Results over 50 MB cannot be cached.
- There are certain types of messages which cannot be stored as .msg files including those with more than 255 recipients or 255 attachments. These messages are not cached.

Keyword Search Term Clarification

Keywords search terms are entered in the [Choose Keyword](#) wizard screen. They are compared against message, attachment and file fields depending on result type and user preference.

- [Keyword Search Terms](#)
- [Boolean Operators](#)
- [Proximity \(Near\) Searching](#)
- [Complex Search Expressions](#)
- [Negative Criteria](#)
- [Using Quotes with Keywords](#)
- [Reserved Words](#)
- [See Also](#)

Keyword Search Terms

Keywords searches are performed by matching a given search term with text in the body (or subject and file name, if selected) of an item. For message, file, or attachment properties searched for keywords, please see the [properties](#) page.

Discovery Attender keywords come in two flavors, [exact search terms](#) and [search terms with patterns](#)

Exact Search Terms

An *exact* (or *Hard Edge*) search term is one without patterns, wild cards, or regular expressions - only the exact word or phrase is evaluated. To do this, the search engine will check the character before and after a string of matching text for any alpha-numeric characters. If there are no letters or numbers before or after the search term, item will pass as a keyword hit and progress to other criteria, if any. If, on the other hand, an alpha-numeric character is found on either side of the text string, the search does not recognize a hit and

continues searching on that item. In order for an exact search term to qualify for a hit, the matching text string must be contiguous – no characters, line feeds, spaces etc. can disturb the internal string.

For example, if we were looking for *riverboat* as an exact search term the following would occur:

Example Text	Match
He made his own riverboat of logs and twine.	Yes
Will she be on time to catch the riverboat?	Yes
Riverboats were the best way up the Mississippi.	No <i>(alpha-numeric character at end of string)</i>
Does the river boat come with a tiller?	No <i>(space within the string)</i>
How does the river-boat handle in the rapids?	No <i>(hyphen disturbs the string).</i>

To get around some of the exact string limitations, consider using wildcards. In the examples above, using the search term *river?boat** would have returned a match in all cases.

For, more information about wild cards, please see the [Pattern Matching](#) help page.

Boolean Operators

The logical operators AND, OR, AND NOT and NEAR are used to further clarify keyword criteria when simple lists are not precise enough.

Reserved Word: AND

Narrows your criteria by only returning hits which match **all** the keywords, phrases or conditions

Reserved Word: OR

Expands your criteria by returning hits which match **any** of the keywords, phrases or conditions.

See the examples below for how these operators are used:

Scenario	<i>fence AND paint</i>	<i>fence OR paint</i>
<i>Fence</i> and <i>paint</i> both appear in the document	Yes	Yes
Only <i>fence</i> appears in the document	No	Yes
Only <i>paint</i> appears in the document	No	Yes
Neither <i>fence</i> nor <i>paint</i> appears in the document	No	No

Please note: Boolean operators are also used for [Negative Criteria](#) (e.g. AND NOT).

Proximity Searching (NEAR)

Discovery Attender provides a keyword option that allows a choice where two or more words must all be present in a document, but cannot be more than a set distance apart. This is referred to as [Proximity Searching](#). For example, a search expression of [Romeo NEAR\(5\) Juliet](#) must find [Juliet](#) within 5 words of [Romeo](#) to be considered a hit.

The standard syntax for proximity searching is: **KeywordA NEAR(#) KeywordB**. The **NEAR** reserved word delineates which word or phrase will be tied by a certain distance of # to the other. Customize the distance by entering the number of words distance after the reserved word in parenthesis, e.g. [John NEAR\(6\) Smith](#) will find [John](#) if it is within six words of [Smith](#), regardless of direction. By default, the distance is three, so [John NEAR\(3\) Smith](#) can be written as [Jane NEAR Doe](#).

The proximity feature is particularly helpful for returning hits where specific keywords can be found close to one another, regardless of order. For example, if you wanted to locate a name such as "[Jane Beth Doe](#)", instead of having "[Jane Doe](#)", "[Jane B. Doe](#)", "[Jane Beth Doe](#)", "[Doe, Jane](#)" etc. you can use proximity searching to limit your keyword to one phrase: [Jane NEAR Doe](#) .

Grouped Proximity Expression

This type of proximity search allows the user to find multiple words near the base words. When using multiple words, they must be delineated using curly brackets, i.e. { and } .

Here are some examples of possible syntax options for multi-word proximity:

- **KeywordA NEAR(#) {KeywordB OR KeywordC OR KeywordD}** **Any** of the words B, C or D can be found within the # of KeywordA to match.
- **KeywordA NEAR(#) {KeywordB AND KeywordC AND KeywordD}** **All** of the words B, C or D must be found within the # of KeywordA to be a match.
- **{KeywordA OR KeywordB OR KeywordC} NEAR(#) {KeywordX OR KeywordY OR KeywordZ}** Any words on the right side are found near any of the words on the left side of the proximity expression.
- **{KeywordA AND KeywordB AND KeywordC} NEAR(#) {KeywordX AND KeywordY AND KeywordZ}** Any words on the right side are found near any of the words on the left side of the proximity expression.

Please note: When using Boolean operators as part of a grouped proximity expression in a keyword list, they must match the type of list. You can only use 'OR' when in an 'ANY' list. 'AND' can only be used in a "ALL' list.

Multiple Proximity Expressions

NEARS can be combined together to form a set of conditional nears. *Discovery Attender* supports a variety of syntax for multiple nears including grouped, directional and with additional AND/OR operators:

- **KeywordA NEAR(#) KeywordB NEAR(#) KeywordC**
- **{KeywordA OR KeywordB} NEAR(#) KeywordC NEAR(#) {KeywordX OR KeywordY}**
- **{KeywordA AND KeywordB} NEAR(#, BEFORE) {KeywordC OR KeywordD} NEAR(#) {KeywordX AND KeywordY}**

Directional Proximity Searches (BEFORE, AFTER)

Discovery Attender supports using directional indicators in proximity. The syntax is **KeywordA NEAR(#, BEFORE) KeywordB**, or **KeywordA NEAR(#, AFTER) KeywordB**. The syntax can also be shortened using just the first letter, e.g. **KeywordA NEAR(#, B) KeywordB** or **KeywordA NEAR(#, A) KeywordB**

Proximity Hints and Tips

- Unlike the Boolean operators (*AND*, *OR*, *NOT*), the *NEAR* reserved word can be used in either a [Keyword List](#) or in a [Search Expression](#).
- Multi-Word phrases are valid in Proximity expressions, but quotes must be used: *"A Connecticut Yankee in King Arthur's Court" NEAR "To Be or Not to Be"*
- [Pattern matching](#) (including standard wildcards) can be used in proximity expressions: *Adventure* NEAR Sawyer*
- Be sure to use the "curly" brackets { and } for any types of grouping within a proximity expression. Standard parenthesis (and) are used for grouping within a search expression and syntax error will occur if they are interchanged. You can, however, group proximity expressions within a search expression, for example:

```
(market NEAR(3) {stock OR bond} AND {bank OR CD} NEAR(4) {loan OR borrow}) OR finance NEAR {job OR position} OR (discount* NEAR invest* NEAR loan* AND (Acme OR Widget))
```

Complex Search Expressions

The Boolean operators can be combined to form more complex expressions, with each expression separated by an OR. For example, you could enter the following: **(fence AND paint) OR (river AND boat)**

Use regular parenthesis (i.e. "(" and ")") to delineate an expression. Expressions can be nested, and each nesting must have its own grouping with parenthesis . In the example below, notice how the parenthesis match the various groupings:

```
(fence AND paint) OR (river AND boat) OR (cave AND (hideout OR "hide out" OR "hide-out" OR "hideaway"))
```

The Proximity Operator can also be used as part of a complex expression:

```
(fence AND paint) OR (river AND boat) OR Yankee NEAR(5) court
```

For assistance in untangling complex search expressions, please use the [Keyword Tester](#) to validate syntax and apply sample text. Users with active maintenance can also [contact Sherpa Technical support](#) for help with search expressions.

Using Quotes with Keywords

The rules for using single and double quotes with keywords depend on the type of keyword search being performed.

Keyword List (Any or All)

The search engine will see the entry of a single line of a word list as a phrase to search, regardless of spaces or any internal punctuation. Quotes surrounding the expression are not required. However, if included, double quotes will be ignored if surrounding the entire phrase. Thus, in a word list, the following are equivalent:

- "To be or not to be"
- To be or not to be

Keyword Search Expression

Quotes should be used for all multi-word phrases or items with delineating characters including spaces, parenthesis or commas. When in doubt surround the phrase with double quotes, or a syntax error could occur. For example, the following search expression: ***Profit OR (1,234,567 AND 7654321)*** will throw a syntax error. To get this expression to resolve correctly use the following: ***Profit OR ("1,234,567" AND 7654321)***

Items with Double Quotes

If you **are** searching for a keyword that contains double quotes, keep in mind the following (for both the keyword list and search expression). For one double quote (e.g. 4" to identify inches), no further formatting is required. However, if you are searching for something that is wrapped in double quotes, (e.g. ***"Wow"***), then you must wrap the phrase in single quotes, i.e. ***'"Wow"'***.

Items with Single Quotes

If you are searching for items with a single quote, no further formatting is required for a word list. For example, the following will all resolve correctly:

- O'Connor
- partners' AND accounts
- "partners' accounts"

However, when using single quotes in a search expression, they must be contained in double quotes:

- "O'Connor"
- "partners' " AND accounts

- "partners' accounts"

However, in the example above, it would be a better idea to use a Like Pattern, e.g. ***Like("partner*
account**")*** to find all possible permutations of the criteria rather than relying on quotes.

Please note:

- If you are using a search expression with one of the [reserved words](#) as a keyword, be sure to place it within quotes or use a [Like Pattern](#).
- Smart Quotes, also known as 'Curly' quotes, are directional quotes often inserted by Microsoft Word. To prevent confusion, *Discovery Attender* will automatically convert Smart Quotes to straight quotes when they are found in keyword criteria.

Negative Criteria

Sometimes with keyword criteria it can be as important to avoid certain words as is it to find others. *Discovery Attender* has a number of options for the so called negative criteria.

- [AND NOT](#)
- [NOT NEAR](#)
- [EXCLUDE](#)
- [Comparison](#)

AND NOT

Narrows your criteria by only returning hits where one search term is in a document while the other is NOT in the document. If you are using 'NOT' as part of a search expression and searching messages, always use the Merge Message Fields option.

For example, a search expression of ***fence AND NOT paint*** must find ***fence*** but cannot find ***paint*** for the document to be considered a hit. This syntax is very tricky, especially when used with parenthesis. See Examples below:

a) ***fence AND NOT paint***

Scenario	Match	Logic
<i>Fence</i> and <i>paint</i> both appear in the document	No	True AND False = False
Only <i>fence</i> appears in the document	Yes	True AND True = True
Only <i>paint</i> appears in the document	No	False AND False = False
Neither <i>fence</i> nor <i>paint</i> appears in the document	No	False AND True = False

b) ***NOT (fence AND paint)*** i.e. ***NOT fence OR NOT paint***

Scenario	Match	Logic
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<i>Fence</i> and <i>paint</i> both appear in the document	No	False OR False = False
Only <i>fence</i> appears in the document	Yes	False OR True = True
Only <i>paint</i> appears in the document	Yes	True OR False = True
Neither <i>fence</i> nor <i>paint</i> appears in the document	Yes	True OR True = True

c) **NOT (fence OR paint)** i.e. **NOT fence AND NOT paint**

Scenario	Match	Logic
<i>Fence</i> and <i>paint</i> both appear in the document	No	False AND False = False
Only <i>fence</i> appears in the document	No	False AND True = False
Only <i>paint</i> appears in the document	No	True AND False = False
Neither <i>fence</i> nor <i>paint</i> appears in the document	Yes	True AND True = True

Please Note: If you are searching messages using the 'AND NOT' operator, be sure to select the 'Merge Fields' option on the Message Options wizard page. This ensures the subject and body are evaluated together.

NOT NEAR

This criteria is an inverse of the [Proximity Operator](#) used to find a word or phrase as long as it is not located in proximity to another word or phrase. Like the NEAR, this expression can also take a numeric value indicating the number of words within the second word or phrase should not appear. The syntax is **KeywordA NOT NEAR(#) KeywordB**. For Example, **"income tax" NOT NEAR(2) "personal"** will find all instances of "income tax" where it is not within two words of "personal"

The NOT NEAR is very useful as it can also contain directional indicators **KeywordA NOT NEAR(#, BEFORE/AFTER) KeywordB**, and multiple words

EXCLUDE

This operator refines searches by locating keywords that match as long as it does not match a specified full excluded expression. It helps to find specific words that are needed without bringing back false positives based on specific usage of the word or phrase. EXCLUDE can be used when a 'BUT NOT' is needed. The syntax is **KeywordA EXCLUDE KeywordA[RestofExpression]** .

For example, the following expression **Confiden** EXCLUDE "Confidential Statement"** would match all instances of *Confiden** (including Confidence, Confidential etc.) as long as it was not part of the phrase *Confidential Statement*.

Please note:

- For the EXCLUDE to be valid, the first keyword or phrase (KeywordA), must be part of the second portion of the expression.
- Similar to the proximity statement, EXCLUDE can accept an integer to describe the range that this comparison should be made within. The default is 5. For example if you want to search for "United States" but you did not want to find "United States of America Presidential Election of 1994", you would need to explicitly input a value of 6 for the range. Since the phrase being excluded is larger than the default range, it is impossible to match the entire expression within 5 words of the original keyword phrase. To be valid, the following should be used:

"United States" EXCLUDE (6) "United States of America Presidential Election of 1994"

Comparing Negative Operators

Operator	Scope	Usage
AND NOT	Entire Document	Should be avoided due to lack of precision and validation, use automatic labels instead.
NOT NEAR	Within NEAR(#) range	Very flexible, can be used in a variety of instances.
EXCLUDE	Within EXCLUDE (#) range	Wherever a 'BUT NOT' is required, i.e. this word, BUT NOT if is a specific usage of the word.

List of Reserved Words

The following is a list of reserved words in *Discovery Attender*. If any of these words are used as part of keyword criteria, they must be enclosed in double quotes. These words are not case sensitive.

Word	Description	Example
LIKE	Used to define a pattern in keyword criteria. Often hidden from the user, but always used by the engine when a wildcard is used.	LIKE("comp*")
AND	Boolean operator indicating that all keyword or expressions on either side of the operator must be found	blue AND green
OR	Boolean operator indicating that any keyword used with this operator could be found	blue OR green
NOT	Boolean operator used to negate an expression. Can be used with AND or NEAR	blue AND NOT green blue NOT NEAR green
NEAR	Used to define proximity of first word or phrase near a second word or phrase	bank NEAR loan
EXCLUDE	Used to find keywords that match the first partial expression so long as it does not match the full excluded expression	confidential EXCLUDE "confidential state-

		ment"
BEFORE	Used with the NEAR operator to define proximity only for items for items found in one direction (left side of expression must come first)	cat NEAR (3,BEFORE) hat
AFTER	Used with the NEAR operator to define proximity only for items for items found in one direction (left side of expression must come second)	cat NEAR (3,AFTER) hat
REGEX	Used to define a regular expression in keyword criteria	RegEx("\d\d\d[-]\d\d[-]\d\d\d\d")
PATTERN	Used to find specific information that is found well defined formats. It is used in conjunction with CC (for finding credit cards) and SSN (for finding social security numbers)	PATTERN(CC)

See Also

- [Pattern Matching](#)
- [Choose Keywords](#)

Supported File Formats for Keyword Searching

When searching files or attachments for **keywords**, there are two methods which *Discovery Attender* can use to parse and analyze text for performing the search. All other criteria (addresses, dates, file types etc.), metadata and result types (Messages, Directory Names) utilizes native *Discovery Attender* digest tools for extracting data. [Compressed files](#) (e.g. .zip, .rar, .tar, etc.) are also supported. Files in multiple levels are extracted before being parsed for text.

The [Raw Data Search](#) is not recommended except for backwards compatibility. It performs a binary text compare against both Unicode and ASCII versions of the file. Theoretically, it can parse all files regardless of format as long as they can be opened for reading. However, in practical terms, all files which are compressed, encoded or encrypted cannot be digested properly (i.e. there are no legible text strings to compare against) and therefore may not return relevant or valid results. This is especially true for keyword searches with acronyms which tend to return numerous false positives when the raw data search is used.

The [Native Search](#) uses the dtSearch® Engine to parse text from many formats for keyword searching. Here is a list of supported file formats which can be searched for **keywords** using the Native Text search option:

Adobe Acrobat	*.pdf	PDF is a standard format and can be created in tools other than Adobe. See this note for more detail.
Ami Pro	*.sam	Old word processing format
Ansi Text	*.txt	Standard text file format
Comma-separated values	*.csv	Opened with spreadsheet programs such as Microsoft Excel
EML files	*.eml	Loose file email format for individual mes-

		sage files used by Outlook Express and others
GZIP	*.gz	Compressed file format
HTML files	*.htm, *.html	Hyper-text markup language, opened by a variety of web browsers, e.g. Internet Explorer
MHT archives	*.mht	HTML archives saved by Internet Explorer
MSG Files	*.msg	Individual message files saved by Microsoft Outlook
Microsoft Access	*.mdb *.accdb	Database formats which parse out record based results.
Microsoft Excel	*.xls *.xlsx	Spreadsheet file format
Microsoft OneNote	*.one	Notetaking program. Note: Versions 2007, 2010, and 2013 only
Microsoft Powerpoint	*.ppt *.pptx	Presentation file format
Microsoft Word	*.doc *.docx	Word Processing format
Microsoft Works	*.wks	Older multi-functional office suite format
Multimate Document	*.dox *.doc	Older word processing format
Open Office 2.x, 1.x	*.sxc *.sxd *.sxi *.sxw *.sxc *.stc *.sti *.stw, *.stm *.odt *.ott *.odg *.otg *.odp *.otp *.ods *.ots *.odf	Documents, spreadsheets, and presentations - Includes OASIS Open Document Format for Office Applications
Rich Text Format	*.rtf	Word Processing format
RAR	*.rar	Compressed file type
TAR	*.tar	Tape Archive File
Text Files	*.txt	Text based files (ASCII and Unicode)
Word Perfect	*.wpd *.wpf	Word Processing format
WordStar	*.ws	Word Processing format
Write Document	*.wri	Word Processing format
XML files	*.xml	Extensible Markup Language
ZIP files	*.zip	Compressed file type

In addition to this list, *Discovery Attender* will try to parse text out of most files types. Indeed, most file types do have some text in them, even if they are non-text formats. For example, a .jpg file may contain text (and thus not throw an exception) like the following:

Image Format: JPEG (EXIF, IPTC)
Software: Adobe Photoshop CS5 Windows
Picture Date: 2013:03:26 20:02:51
Image Width: 2421
Image Height: 1519
Object Name: Print
Format: image/jpeg
Xmp:MetadataDate: 2013-03-26T20:02:51-04:00
Xmp:ModifyDate: 2013-03-26T20:02:51-04:00
Xmp:CreateDate: 2013-03-26T19:44:14-04:00
Xmp:CreatorTool: Adobe Photoshop CS5 Windows
XmpMM:InstanceID: xmp.iid:B14FD53E7196E2119DCEF984C4166D40
XmpMM:DocumentID: xmp.did:6C37EEB97096E2119DCEF984C4166D40
XmpMM:OriginalDocumentID: uuid:5D20892493BFDB11914A8590D31508C8
XmpMM:RenditionClass: proof.pdf
Illustrator:StartupProfile: Print
XmpTPg:HasVisibleOverprint: False
XmpTPg:HasVisibleTransparency: False
XmpTPg:NPages: 1
Pdf:Producer: Adobe PDF library 9.90
Photoshop:ColorMode: 4

Note: As mentioned above, *Discovery Attender* searches for keywords in the body of files and attachments using an engine (based on dtSearch) to collect and parse the retrievable text. *Discovery Attender* will identify and list the files it cannot parse, search or read in the task logs.

When dealing with **PDF files** specifically, it is worth noting that there are a variety of formats ranging from fully readable to completely locked or image only (no text retrievable). *Discovery Attender* may not be able to search PDF files if the PDF is:

- a) Using a high level encryption (128 bits or above)
- b) Password protected
- c) Image only
- d) Corrupt (i.e. not encoded correctly)

Please note: The PDF Password parsing may be able to parse some passwords. It is a good idea to enable the functionality in the [Settings](#).

To help manage these inaccessible files, *Discovery Attender* has several options.

- 1) Enable the [PDF password handling](#) and turn off [document properties parsing](#) in the Settings. This will reduce the number of exceptions caused by the 'blank' encryption present in many PDF files.
- 2) Use the [PDF Text Ratio Checking](#) to help address the image only issues.
- 3) Some *Discovery Attender* users will run a search for a common keyword (e.g. 'the') against all the PDF files in the source data set. If this sample search finds a significant number of inaccessible files, the entire PDF set could be produced for further processing or manual review. Another option is to deploy a third party Optical Code Recognition (OCR) software on the PDF files to render them text readable before the main search is executed.

To find out if a specific PDF file is encrypted or password protected, open the PDF file and access the Properties option under the File menu. Select the 'Security' tab to see a description of the document security level. The 'Show Details' button will offer further information.

Properties

Following is a list of properties searched or relevant for each type of criteria for Exchange based mail stores.

- [Keyword](#)
- [Address](#)
- [Message Types](#)

Keywords

Messages	MAPI Property Name
Subject	PR_SUBJECT_W if present, otherwise PR_SUBJECT
Body	PR_BODY_W if present, otherwise... PR_BODY if present, otherwise... PR_BODY_HTML_W if present, otherwise... PR_BODY_HTML if present, otherwise... PR_RTF_COMPRESSED
Internet Headers	
If Addresses are chosen for a keyword search (see Message Options), the same properties are searched as in the address fields below	
Attachments	
Display Name	PR_DISPLAY_NAME_W
File Name	PR_ATTACH_FILENAME_W (file) PR_ATTACH_LONG_FILENAME_W (file) PR_ATTACH_LONG_PATHNAME_W (shortcut) PR_ATTACH_PATHNAME_W (shortcut)
Attachment data lives in the PR_ATTACH_DATA_BIN property of the message	

Address Criteria

Sender	Display Name: PR_ORIGINAL_SENDER_NAME Email Address: PR_ORIGINAL_EMAIL_ADDRESS
On Behalf Of	Display Name: PR_ORIGINAL_SENT_REPRESENTING_EMAIL_NAME Email Address: PR_ORIGINAL_SENT_REPRESENTING_EMAIL_ADDRESS
*Recipient	Display Name: PR_DISPLAY_NAME Email Address: PR_EMAIL_ADDRESS

*There can be multiple Recipient addresses per each of the recipient fields (To, CC, BCC). Each recipient address is its own object with unique address and display name properties.

Message Types

Type	MAPI Class
Email	IPM.POST IPM IPM.NOTE IPM.NOTE.SECURE IPM.NOTE.SMIME REPORT.IPM
Calendar	IPM.APPOINTMENT IPM.SCHEDULE.MEETING.CANCELED IPM.SCHEDULE.MEETING.REQUEST IPM.SCHEDULE.MEETING.RESP.NEG IPM.SCHEDULE.MEETING.RESP.POS IPM.SCHEDULE.MEETING.RESP.TEN
Journal	IPM.ACTIVITY
Notes	IPM.STICKYNOTE
Contact	IPM.CONTACT
Tasks	IPM.TASK IPM.TASKREQUEST.ACCEPT IPM.TASKREQUEST.DECLIN IPM.TASKREQUEST IPM.TASKREQUEST.UPDATE
Other	Any item that has a class which is not listed above

Tips & Tricks

- Store your project on the same machine where *Discovery Attender* is installed. Searching with projects on networks can be done, however it is slower and less responsive than local project installation. Above all else, **do not** run your projects from USB drives
- Make sure your read receipts are turned off in Outlook, especially if you are viewing your results in Native Format.
- The [Raw Data option](#) is for backwards compatibility. While it is not needed for most searches, certain formats (Visio, Project) respond better to this option. However, use **Raw Data** sparingly when searching any criteria with acronyms as it tends to result in false positives.
- When running *Discovery Attender* continuously, it is a good idea to close and restart the application from time to time, especially after a large search or export. Memory will release much more efficiently, and this step allows the Windows messaging subsystems to clear.
- If you are using '**NOT**' as part of a search expression, always use the **Merge Fields** options. Keep in mind that we don't actually recommend that you use any of the NOT options as it is difficult to validate negative criteria. Instead, we recommend using [Automatic Labels](#) to identify items that you do not want to produce.

- If you are searching for discovery purposes, it is a good idea to familiarize yourself with some resources available to help your design processes, search methodology, and best practices. The [EDRM](#) website is an excellent starting point and has volumes of detailed description of the electronic discovery process from start to finish.
- For a more detailed commentary and best practices, view the [publications](#) available at the [Sedona Conference](#) website.
- Enable the [PDF Password](#) settings with at least a few passwords. This can significantly help reduce exceptions on PDF files.
- When searching character based languages (Chinese, Korean, Japanese, etc.) **always** use wildcards to delineate strings (e.g. *佢地商*).

Archive Attender Searching

Discovery Attender has the ability to search Sherpa Software's *Archive Attender* archive locations using all the criteria available for an email search. The following details may prove helpful when searching these data stores:

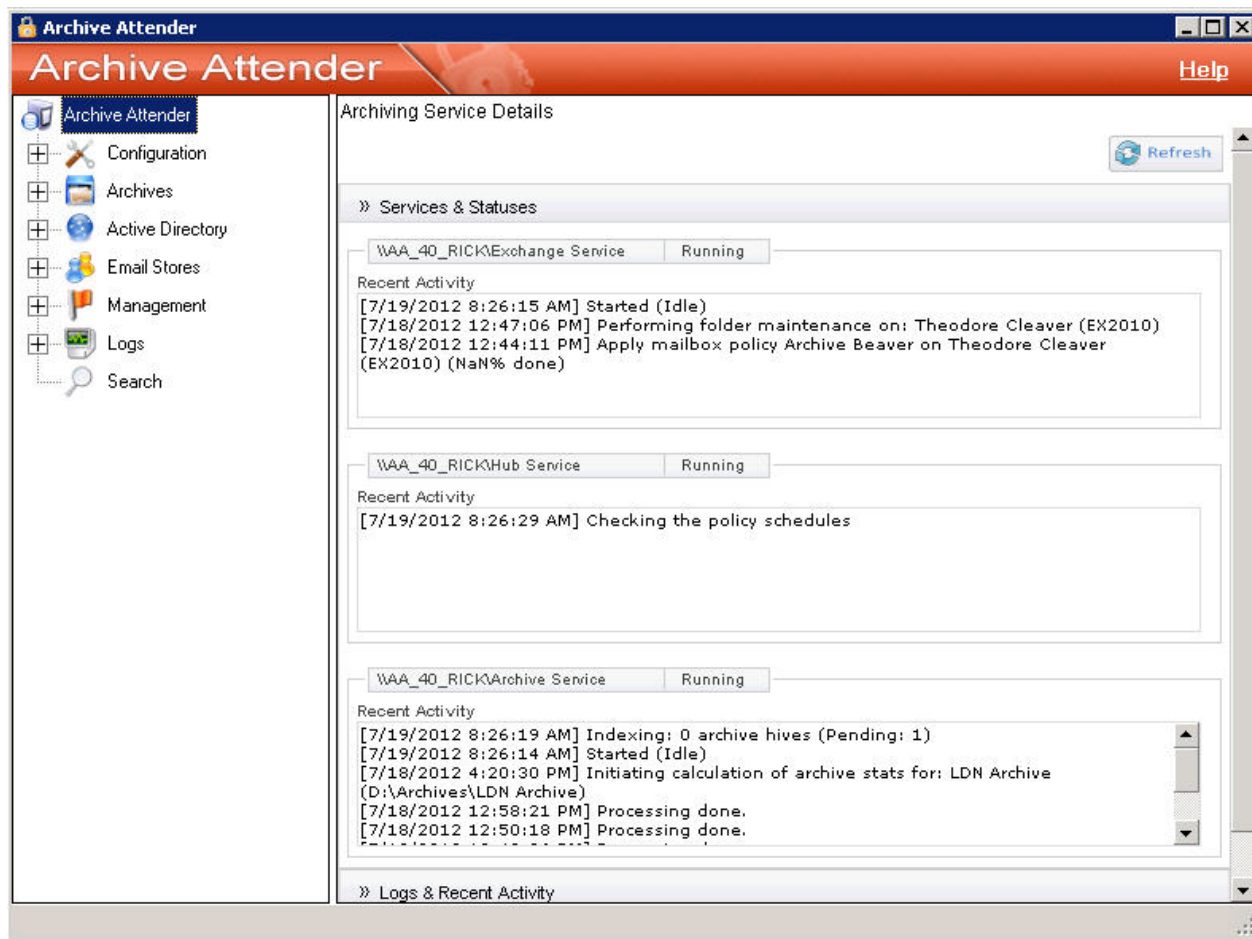
- Before starting your search, make sure you know the locations of your archives. *Discovery Attender* can only locate **Archive Users** in known archive paths.
- *Archive Attender* does **not** need to be installed on the same computer as *Discovery Attender*. Searches are run independent of any *Archive Attender* installation.
- Items found in an archive location cannot be moved or deleted using *Discovery Attender*.
- If you are planning on using *Discovery Attender* as the primary method of searching *Archive Attender* archives, navigate to [Tools | Settings | Archive Attender](#) and enter your archive locations in advance. You can then use the pre-filled **Load** list to quickly select your users in the [Select Archive Users](#) wizard page.
- Use the **Split** option available on the [Select Archive Users](#) wizard page to speed up the searching of large archives. This option will search the first level directories for each archive as a separate task. This, in turn, improves the efficiency of the searches, reducing errors and speeding up the completion of the search.
- To ensure that the searches are consistent with other email data stores, *Discovery Attender* applies the search criteria directly to the archive files, bypassing the *Archive Attender* index. Thus, you will notice searching via *Discovery Attender* will take significantly more time to search than the *Archive Attender* native index search.

Please Note

If your organization does not use *Archive Attender*, you can hide the wizard options for searching the archives. Go to the [Tools | Settings | Archive Attender](#) node and uncheck the choice in **Wizard Show Option**

About Archive Attender

Archive Attender is a software based email archiving tool that allows you to effectively control the size of Exchange Server databases. Using *Archive Attender*, administrators may create sophisticated rules that move messages and attachments from mailboxes or PST files to network storage locations that support UNC (Universal Naming Convention) addressing. Once messages have been archived, end users can easily access their content from Microsoft Outlook either by clicking on a stub link in the message body or performing a keyword search to find archived data.



To learn more about Sherpa Software's *Archive Attender* product, please visit our [website](#).

See Also

- [Select Archive Users](#)

Overview of Handling Exceptions

One of the key components of the electronic discovery process is the ability to cull and filter data. In an ideal world, your criteria would be run against easily accessible custodian data stores. With a few clicks of some fancy buttons, a relevant, pristine data set would be produced.

Alas, the real world rarely grants such a straightforward process. Discovery matters become more complex as data is collected from a cornucopia of electronic data sources using a variety of media. The processing of data can be fraught with issues small and large, running the gamut from inaccessible source data to corrupt, encoded or password protected files, invalid formats, even the inability to create export files.

It is up to the tools of the trade to help end-users address the issues and exceptions that are encountered during the standard collection and searching of data. While the quirks of electronic data make it next to

impossible to avoid problems entirely, the strength of your electronic discovery process lies in the way these issues are handled and audited.

It is of paramount importance that exceptions be identified during processing. Without clear issue logging, it would be impossible to find and resolve the problems that do occur. For those items that can't be resolved, methods to handle exceptions are essential. You don't want one inaccessible data store to bring down a search that has been running for hours. Detailed reporting of the exceptions is key to helping keep a robust audit trail. In Discovery Attender, that detailed reporting can be found in the [Combined Exception Log](#).

In addition to identifying exceptions, your e-Discovery process should clearly lay out alternate means of processing in case it is required. Equally, it would be beneficial to define the conditions under which these alternate methods will be employed. While every condition cannot be anticipated, clear communication will make the process run smoother. For example, if a number of password protected documents are encountered, making text search impossible, make sure all the stakeholders are clear on how these items will be handled and under what conditions (and cost) they might be reviewed or produced.

Within Discovery Attender, exceptions are entered into two places a) text log files, and b) the [Exception Logs](#) that can be accessed on a task or search level. A myriad of alerts for errors, skipped items or warnings can be produced on any level of a task. Examples include data store (Access Denied), documents (Unable to Parse, Encryption), folder (cannot retrieve list of items) or message (Corrupt Property) exceptions.

Once these issues are identified, Discovery Attender provides a number of features to help users further process data in accordance with their discovery plan. Data stores that were corrupted or encountered access errors can be identified and resolved. Then, Discovery Attender can rescan the source data stores for inclusion in the production set.

For document or message level issues, some users simply use the built-in reports to audit the problems. Others will take advantage of the unique export feature to create a separate collection of exception items for further processing.

Regardless of how you process data, if your e-Discovery process is not clear on exceptions, more clarification (and therefore time) will be needed to respond to discovery requests. Ignoring this area can lead to gaps in the audit trail and, perhaps, adverse judgments.

The key point to take away is that exceptions will occur. Make sure that proper tools are in place to identify issues, along with a proper process to adequately address problems that arise. With the help of these two steps, collection and searching data becomes much less complex, and much more efficient, effective, and defensible.

Reducing Exceptions

Within Discovery Attender there are several steps you can take to reduce the number of exceptions:

- Enable [PDF Password Parsing](#). This option, found in the Settings, will parse all the so-called 'blank' encrypted PDF documents as well as attempt to apply any of the listed passwords against an encrypted PDF file.
- Exclude Files. This option, enabled using the [File Names and Types](#) criteria, will keep exceptions to a minimum by keeping out file types that may not be relevant to the search, but often cause exceptions such as .cab and .msi files.
- Use ScanPST.exe to address corrupt PST files.

If you have questions regarding specific exceptions, please contact [Technical Support](#)

Lotus Notes NSF File Searching

Discovery Attender has the ability to search Lotus Notes Mail NSF files using all the criteria available for an email search. The following details may prove helpful when searching these data stores:

- To search successfully, a Lotus Notes client 8.5.1 or above must be installed on same machine as *Discovery Attender*. To ensure a smooth search, default password and other settings should be entered at [Tools | Settings | NSF](#).
- To avoid straining the Lotus Notes specific drivers used in searches, it is a good idea to keep the number of tasks concurrently processing at three or below. This setting can be found at [Tools | Settings | General](#) node.
- To ensure that the searches are consistent with other email data stores, *Discovery Attender* applies the search criteria directly to the message items, bypassing the default index. Thus, you will notice searching via *Discovery Attender* will take significantly more time than search via the Lotus Notes native index search.
- Make sure the Notes client password is entered into the Settings.
- Only Lotus Notes *mail items* (including calendars) can be searched. Attempting to search other Notes applications or databases will result in an error. If the file you wish to search is a non-standard mail file, you can disable the mail template verification by going to [Tools | Settings | NSF](#).

Folders

Folders in NSF mail files are similar to views in other applications. This means there is a many to one relationship between folders and messages; a single message can have multiple folders.

There is also a default folder/view called 'All Documents' which contains every item in the NSF mail file.

In addition, there can be items that are without any folders. When exporting to NSF file, these items are placed in a generic view called *[No folder]*.

See Also

- [Select NSF Files](#)

Preparing for an Electronic Discovery Search

IT administrators are sometimes puzzled when responding to e-Discovery requests. Often times, the techs will kick off *Discovery Attender* and not realize that some preparations should to be made prior to beginning the searching process. To save stress and time (and therefore money), it is a good idea to ask the following questions as soon as you get an e-Discovery request from your legal department:

- What is the scope of the search?
- How should exceptions be handled?
- How should results be presented?
 - Should the result set to be deduplicated?
 - What format should the results be in?
 - What types of reports are needed?
- Who key point of contact for clarification?
- What is the case about?

The first questions to ask include who is important in this case, what date range is relevant and what kinds of data should be targeted for this discovery. Sometimes entire data stores need to be included, but often the scan can be limited to just specific custodians and targeted date ranges. Email is the most common type of

data store included for discovery. However, often files stores, SharePoint, even backups or laptops may be relevant to a case. Be sure to clarify these questions ahead of time to determine the scope of the work that needs to be done.

In an ideal world, every document in your data set will be searchable. However, there are instances when items cannot be searched due to encryption or corruption. For every file or email that cannot be searched in Discovery Attender, an exception is generated. What should you do with these items?

Discovery Attender has a variety of options to deal with exceptions. First, you can generate a report that lists the items that threw an exception and reasons why. Another choice is to export these items (where possible) and deliver an exception set in conjunction with the result set. In some instances, you might even be able to ignore these items. To gain insight as to what option is best, and to avoid difficulties in the future, be sure to ask the requestor directly how they would like to handle exceptions.

Once the search is completed, you will have a result set which contains the items that meet your specified criteria. There are a number of options inside Discovery Attender for organizing and streamlining your data set. One popular option is [deduplication](#) which creates a single instance for each unique item in your result set. For example, let's say the same message was emailed to three of the mailboxes in your search resulting in the same message appearing three times in your result set. Deduplicating will identify a single message, while still keeping links to the original three. Reviewing and exporting these unique items will save a significant amount of time and money over the processing the entire data set. Make sure the people requesting the data know deduplication is an option.

In addition to determining whether you need to deduplicate your result set, you will also need to determine how to present the data to the e-Discovery requestor. This not only includes file type, but also the path structure, size of data set, and format. For instance, you can export the result set to a PST file or to flat files. To build on this even further, you can also vary the formatting of the exported data. For example, you can either export your result set to a single PST file or generate a PST file per email store you searched. Additionally, you can also change the formatting used in the internal structure of the exported PST file or change the naming convention used when exporting to flat files.

Often times, you will need to supplement the exported result set with certain reports. Specifically, you may need to report on the search criteria, number of hits were found, and so forth. There are a variety of reporting capabilities within Discovery Attender. For example, you can generate a summary report that gives a brief synopsis of the search that was performed, a duplicates report that provides a listing of each unique item and whether it had duplicates, a custom CSV report and include only specified data, and much more.

The last thing you should determine when you receive an e-Discovery request is who the main point-of-contact is if you should have any questions. Most often this will be the e-Discovery requestor, but you will need to clarify that this is also the person who can answer questions about keywords, custodians, export format, search locations or other topics discussed above. This person should also be in touch with you throughout the steps of your process, especially if you are dealing with large data sets to help determine the best plan of attack (which custodians should be searched first, approving criteria and sampling results etc.)

An essential component in determining the plan of search is knowledge of the case itself. The more familiar that you are with the case, the more helpful you can be to the requestor. There are many details that IT would know (dates of backups, data maps, reasonableness of accessing certain stores, syntax concerns, industry acronyms etc.) which may benefit the legal side of the house when determining the total cost of the case, or trying to hammer out details in the meet and confer sessions with opposing counsel.

There are many other questions that could be added to this list. In fact, any detail you can get about the search ahead of time will help you better prepare for an e-Discovery search. Having clear direction and keeping clear

lines of communication will make the tasks run much smoother and do much to reduce confusion and stress during the e-Discovery process.

Searching Large File Shares

Here is some advice on how to make your search more efficient while reducing the number of errors encountered when searching file shares.

Use the 'Split' option

The key to a successful file search is to break up the file share into as many individual tasks as is practical. To do this, use the '[Split](#)' button of the '[Choose File Paths](#)' wizard page. The path you selected will be rendered to the first level folders, one task per folder. This makes the search more efficient by utilizing multiple threads against a single data store. It also isolates errors into one task so the entire file share search is not compromised. Splitting a path also allows for easier review and filtering of the results. For very large file shares, you may want to actually split the paths several times.

Please note: it is critical that you *do not* search large file shares as a single path!

Exclude File Types

If you are searching for keywords, make sure you utilize the '[File Types](#)' criteria option to avoid searching in files formats where keyword data cannot be digested (media files, database files, raw mail files, etc.)

Once on the '[Choose File Types](#)' screen, select the exclude option, then click the Common button. Feel free to add additional file types to the list. Any types listed with the exclude option will be skipped. This reduces false positives and time out errors while speeding up the search.

Increase your Watchdog Time-out

The default timeout may be too low if you are searching large files across a network. If a file takes longer to process (think a large database), the entire task will fail with the following note in the task log: "[timestamp] **ERROR: Task process no longer responding**". This is the most common error we see with customers searching file shares and can easily be countered by going to the '[Settings](#)' and increasing the Watchdog Timeout.

Get Permission

Make sure you have the proper permissions for the entire file share as well as all sub paths that will be included in the search. Permissions issues are the second most popular errors in file searches.

Use Multiple Searches

If you are searching terabytes of data, separate the storage locations even further by breaking up the load amongst a number of searches. This is also helpful if you have a large search and have a mixed set of source

data, mail and loose files. Put each type in a different search. This will also make the processing of results much easier.

Do a Sample Search first

This will give you an understanding of the approximate duration, load on your servers, approximate number of results as well as revealing types of false positives and give you the opportunity to adjust your search criteria before committing to a long search.

Searching for PCI and PII Data

A variety of regulations in a number of industries forbid the storage of **Payment Card Industry** or **Personally Identifiable Information** data in clear text (i.e. unmasked). *Discovery Attender* is often deployed to find email and files which contain the rouge information such as social security and credit card numbers. It does so by recognizing PCI identification patters using the [Regular Expression](#) feature. These can be made even more effective, and reduce false positives by combining regular expressions with proximity searches.

There are some notes to be aware of when searching for PCI data:

- Using the PATTERN reserved word is the most effective method for finding credit card or social security numbers. However, the algorithm used does create some false positives, although far less than other methods.
- Always use the [keyword tester](#) to verify the expression you have created will be valid in *Discovery Attender*.
- When testing, use data that *should* match, as well as data that *should not* match. It is very easy to create an over-broad expression that will create numerous false positives.
- Be very clear of what you want to find before starting the creation of your regular expression. If finding credit cards, for example, do you need the formats of all the types of credit cards, or just Visa and MasterCard. Do you want to find the words "Credit Card", or "CC" before the number? What date formats will be represented in your data set if you are looking for date of birth, or date of hire information?
- There are a number of regular expression libraries on the Internet that have useful features for creating and testing regular expressions. However, many of these libraries are geared toward finding data in fields (e.g. validating against a web site payment entry form) versus a document or email body. Please test any regular expression thoroughly.
- The Preview Pane and Text Search viewer cannot render regular expressions. Use the keyword snippets to get a better idea of where hits were found in a document.
- Always, always, always do a sample search first!

Here are some examples of basic search and regular expressions submitted by our customers. Each expression does something different, some work in sets. You **will** want to adjust them to suit the needs of your particular search.

Please note: Each one of the expressions listed below has benefits and downsides to using them. None are promised to find the exact match that you are looking to find (no warranty is offered or implied). They are here for sample purposes only.

You should test these and any regular expressions against your own data before deploying them in your search!

Examples

There are several ways to implement checks for PCI and PII data. The most effective is using the PATTERN reserved word, or a regular expression with a combination of proximity searching . Regular expressions by themselves often produce numerous unwanted false positives. The list below gives some examples.

Credit Card Numbers

Using the PATTERN reserved word for credit cards. This option uses the Luhn algorithm combined with some programmatic reduction of false positives:

- PATTERN(CC)

An attempt to get all the numbers with one single expression:

- RegEx("(cc|credit|s{0,3}card)?[\\D]{0,60}(\\d{4}(\\d{4}){3}(\\d{3})?\\d{4}[\\D]?\\d{6}[\\D]?\\d{5}(\\d{4})?)")

More targeted attempts can be seen in this search expression:

- {credit* OR charge*} NEAR(3) {card* OR num*} NEAR(10) RegEx("(\\d{4}(\\d{4}){3}(\\d{3})?\\d{4}[\\D]?\\d{6}[\\D]?\\d{5}(\\d{4})?)[^A-Za-z0-9]") OR card* NEAR(3) num* NEAR(10) RegEx("(\\d{4}(\\d{4}){3}(\\d{3})?\\d{4}[\\D]?\\d{6}[\\D]?\\d{5}(\\d{4})?)[^A-Za-z0-9]") OR {AMEX OR AX OR "American Express" OR VISA OR VS OR MC OR MASTER* OR DS OR DISCOVER} NEAR(10) RegEx("(\\d{4}(\\d{4}){3}(\\d{3})?\\d{4}[\\D]?\\d{6}[\\D]?\\d{5}(\\d{4})?)[^A-Za-z0-9]")

Social Security Numbers

Using the PATTERN reserved word for social security numbers. This option uses a regular expression combined with some programmatic reduction of false positives:

- PATTERN(SSN)

Find a social security number pattern near identifying keywords. To just find the number, try the regular expression alone without the portion before the proximity. Note: The regular expression used below finds social security numbers in a precise, defined range.

- {"ss#" OR "ss #" OR ssn OR soc*} NEAR(5, BEFORE) RegEx("(\\b(?:000)([0-6]\\d{2})7([0-6]\\d{7}[012]))([-]?)(?!00)\\d\\d3(?:0000)\\d{4}\\b")

Place of Birth

Type	Expression
Search Expression	POB OR place* NEAR(5) {born or birth} OR "born in"
Regular Expression	Regex("(pob[^j] place\s*of\s*birth birth\s*place born\s*in)")

Note:

- The inclusion of 'POB' leads to a large number of false positives if your organization uses that acronym for other reasons.
- This also will find large numbers of historical figures or biographical details where 'born in' may be popular
- In this case, the Search Expression is much more focused than the Regular Expression as it tightens the proximity of the words to one another.

Date of Birth

Type	Expression
Search Expression	dob NEAR(10) Regex("[\D]{0,30}((19 20)?\d\d[-\s\W.])((0)?[1-9][12][0-9][3[01]][-\s\W.])((0)?[1-9][12][0-9][3[01]])((0)?[1-9][12][0-9][3[01]])[- \s\W.](0[1-9][12][0-9][3[01]])[- \s\W.](19 20)?\d\d((0)?[1-9][12][0-9][3[01]])([S\s]{0,3}(nd th st rd)[S\s]{0,3})?\s{0,3}(jan(uary)? feb(ruary)? mar(ch)? apr(il)? may jun(e)? jul(y)? aug(ust)? sep oct(ober)? (sept nov dec)(ember)?)(\.)?\s{0,3}(19 20)?\d\d (jan(uary)? feb(ruary)? mar(ch)? apr(il)? may jun(e)? jul(y)? aug(ust)? sep oct(ober)? (sept nov dec)(ember)?)(\.)?\s{0,3}((0)?[1-9][12][0-9][3[01]])([S\s]{0,3}(nd th st rd)[S\s]{0,3})?(,)?\s{0,3}(19 20)?\d\d)") OR date* NEAR(3) {born OR birth} NEAR(10) Regex("[\D]{0,30}((19 20)?\d\d[-\s\W.])((0)?[1-9][12][0-9][3[01]])[- \s\W.])((0)?[1-9][12][0-9][3[01]])((0)?[1-9][12][0-9][3[01]])[- \s\W.](0[1-9][12][0-9][3[01]])[- \s\W.](19 20)?\d\d((0)?[1-9][12][0-9][3[01]])([S\s]{0,3}(nd th st rd)[S\s]{0,3})?\s{0,3}(jan(uary)? feb(ruary)? mar(ch)? apr(il)? may jun(e)? jul(y)? aug(ust)? sep oct(ober)? (sept nov dec)(ember)?)(\.)?\s{0,3}(19 20)?\d\d (jan(uary)? feb(ruary)? mar(ch)? apr(il)? may jun(e)? jul(y)? aug(ust)? sep oct(ober)? (sept nov dec)(ember)?)(\.)?\s{0,3}((0)?[1-9][12][0-9][3[01]])([S\s]{0,3}(nd th st rd)[S\s]{0,3})?(,)?\s{0,3}(19 20)?\d\d)")

This expression assumes that the date of birth will be preceded by 'dob' or various permutations of "date born" or "birth date", followed in close proximity to the regular expression for dates. Unusually formatted dates may not be found.

Please contact [Technical Support](#) if you have questions about deploying searches for PCI or PII data.

SharePoint Searching

Discover Attender has the ability to search items which are stored on SharePoint servers using all the criteria available for file searches. The following details may prove helpful when searching SharePoint data stores:

- A separate license key is required to enable SharePoint functionality. This key can be entered when *Discovery Attender* is first [started](#), or by accessing *Help | License Management* from the [Main Console](#). This opens the [License Management](#) screen.
- The ***Discovery Attender for SharePoint Service*** needs to be installed on a server in the SharePoint farm which needs to be searched. The main processing of the SharePoint searches is conducted via this component.
- Discovery Attender can only connect to one SharePoint server at a time. That server must be listed under the 'Search Services URLs' in the Discovery Attender [SharePoint Settings](#) and be set as the default.
- SharePoint lists consist of many types (including custom values). You can choose the types to search using the search [wizard](#).
- To ensure that the searches are accurate and consistent, *Discovery Attender* bypasses the SharePoint index. This makes searching via *Discovery Attender* significantly more time-consuming than a search via the SharePoint native index search. |
- There is an option, when choosing SharePoint search criteria, to search the older versions of the file. If this option is selected, previously saved versions of the file will also be scanned using the defined search criteria. However, please note that the *Discovery Attender for SharePoint* component will only search older files that are under a 100 MB in size. Older files larger than 100 MB will be skipped and recorded as a skip in the processing log.
- Discovery Attender 4.0 searches SharePoint 2013 servers only. To search earlier versions of SharePoint, please contact technical support.
- It is **highly** recommended to cache SharePoint data while searching if you plan on exporting results at a later time.

SharePoint contains two distinct data sources: sites and site collections. If you select a *site*, only *that site* is searched. By selecting a *collection*, all sites contained within the collection are searched. Although a collection may display in red (indicating that *Discovery Attender* lacks sufficient access rights to search the collection's top level), underlying sites beneath it may still be searchable.

When setting up a SharePoint search, you can also specify individual lists or users to include or exclude in the Search Wizard's [SharePoint Data Options](#) screen.

Please Note

If your organization does not search SharePoint with Discovery Attender, you can hide the options in the Wizard. Navigate to the [Tools | Settings | SharePoint](#) node and uncheck the choice in 'Wizard Show Options' .

See Also

[Selecting SharePoint Sites](#)

Searching for Privileged Data

When performing an e-Discovery search, there is often a need to parse the responsive data (i.e. the items that match the search criteria) into privileged and non-privileged data sets. Privileged data is any information that is protected by a legally recognized right against disclosure, for example communication between an attorney and client. . Even if it is relevant to a case, privileged data can be excluded from being used as evidence in court. As a result, many of our customers need to identify and eliminate the privileged data from the result set.

There are many ways to identify privileged data with Discovery Attender. For instance, you could create a search that excludes this data by using the NOT or EXCLUDE operators. Although this may eliminate the privileged data from your result set, you will not be able to report on what was eliminated and why. That is, you will not be able to create a privileged log, nor will you be able to readily prove why a specific item was considered privileged and hence removed from the responsive data set. Therefore, there are 2 recommended ways in Discovery Attender to parse the responsive data into privileged and non-privileged data sets:

- Single Search Method - This option identifies the privileged data as a function of the current result set.
- Two Search Method – This option identifies the privileged data using 2 searches.

Single Search Method

The single search method uses [Auto-Labels](#) and/or [Advanced Filters](#) to identify the privileged data. Once privileged data is identified by using these options, it can easily be excluded from the export using marks to filter the data.

Auto-Labels have the added benefit of getting the search and identification done in one step. They are configured during the set up of the search wizard to identify a sub-set of the results as privileged while the main search is being run (i.e. it is a search within your search):

Once you select this option, you will be able to specify the keywords and/or addresses that will identify your privileged data within your responsive data. The items that meet the criteria for the Auto-Labels will be part of your result set and will be found under the [By Labels](#) node.

Additionally, you can use Advanced Filters to select and identify your privileged data. Advanced Filters are processed against the result set (i.e. a search against the result set). They can use dates, addresses keywords or result properties. However, using keywords requires that you select Index Results in the search wizard.

Any number of Advanced Filters can be added after the search is run. This method is effective when you are unsure of your privileged criteria. You can query and cull your data in a number of ways without changing the underlying search.

Two Search Method

The Two Search Method is the most effective way of removing privileged items as it has the most thorough audit trail. With this method, you will do create two searches using the following process:

1. Create the First Search for items that match your search criteria.
2. Organize and deduplicate data as needed
3. Export the responsive items to a result set. This is now your responsive result set.

4. Create a new search which scans the responsive result set created in Step 3 to find the privileged data.
5. Use the action **Move to PST** and/or **Move to File** to export result items to a new privileged data store. The 'Move' options copy the data to the new privileged data store, then delete the data from the responsive result set

Note: The **Move to PST** and **Move to File** actions are disabled by default. You will need to enable these [Advanced Actions](#) in your Discovery Attender settings.

At the end of this process, you will have a set of responsive data, and a set of privileged data along with details on the criteria used to create each of them.

Both the Single Search Method and Two Search Method have advantages and disadvantages:

	Pros	Cons
Single Search Method	<ul style="list-style-type: none"> • Complex criteria can be used effectively • Additional items can be excluded after the searches are run • Interface can be used to validate items 	<ul style="list-style-type: none"> • No separate set of privileged items • No in-tool count or readily available report of excluded privileged items • Multiple steps
Two Search Method	<ul style="list-style-type: none"> • Log, count and reports of privileged data • Separate, producible set of privileged data • Clear, easy to reproduce steps • Can use the most flexible criteria, without an index to take up room 	<ul style="list-style-type: none"> • Method takes more time • Multiple searches • Will have to produce two sets of reports • Must have well defined privileged criteria

Troubleshooting Guide

Use this guide to help you through some basic issues in *Discovery Attender* setup and searching. Details for errors can be found in the application or task log files. If your issue is not listed below and you have maintenance, please contact [technical support](#).

License key is coming up as 'Invalid'.

This error usually occurs in one of the following scenarios:

- **Incorrectly typed license keys** Try using cut and paste instead of typing in the keys.

- **Invalid permissions** Discovery Attender requires local administrator rights for the login account. On a computer with a Windows Vista or Windows 7 operating system, you need to run the executable as Administrator. To verify you have the correct permissions, navigate to [Tools | Settings](#) to open the settings screen. Click 'OK'. If this throws an error, you do not have the required permissions.
- **Using a temporary key after it has expired** Contact your [Sherpa sales](#) representative to get your permanent key.

Accessing a Mailbox throws a MAPI_E_FAILONEPROVIDER access error.

You do not have the correct permissions to search that Exchange Mailbox. Discovery Attender requires full Send As/Receive As access to search mailboxes successfully. Please check out the articles listed below which details how to grant permissions to all mailboxes to a service account.

Exchange 2003 (Q821897):

<http://support.microsoft.com/default.aspx?scid=kb;en-us;821897>

Exchange 2007:

[http://technet.microsoft.com/en-us/library/aa998291\(EXCHG.80\).aspx](http://technet.microsoft.com/en-us/library/aa998291(EXCHG.80).aspx)

Exchange 2010:

<http://technet.microsoft.com/en-us/library/aa996343.aspx>

Searching or copying to a PST and throws the following error:

Unable to open PST session: (@08055396) The file D:\test.pst is not compatible with this version of the Personal Folders information service. Contact your administrator. Component: 'Personal Folders' Context: 10050203: MAPI_E_EXTENDED_ERROR (80040119).

This error will appear if Outlook 2000 or XP is installed on the Discovery Attender computer and the default settings in Discovery Attender are set to create a PST using the 2003 format.

To resolve, change the format of PST files in Tools>Settings to the ASCII format. Alternately, install a version of Outlook 2003 or above

The following error appears in the task logs numerous times:

ERROR: Unable to convert attachment to perform keyword search

DETAILS: This file is encrypted or password protected and cannot be parsed

ATTACHMENT: FileName.pdf

Discovery Attender searches for keywords in the body of files and attachments in conjunction with an engine that reads and parses the retrievable text. This error, or one like it, is generated in the task log when *Discovery Attender* identifies a files it cannot parse, search or read.

When dealing with PDF files specifically, it is worth noting that there are a variety of formats ranging from fully readable to completely locked or image only (no text retrievable). *Discovery Attender* may not be able to search a PDF files if that PDF is:

- a) Using a high level encryption (128 bits or above)

- b) Password protected
- c) Image only
- d) Corrupt (i.e. not encoded correctly)

To find out if a specific PDF file is encrypted or password protected, open the PDF file using Acrobat Reader and access the Properties option under the File menu. Select the 'Security' tab to see a description of the document security level. The 'Show Details' button will offer further information.

Discovery Attender does offer the option to parse passwords. This functionality can be enabled in the settings [PDF Options](#) node.

Note: You can use the [Combined Exception Log](#) to export all items that encounter this issue. The entire exception set can be produced for manual review, where possible.

The Virus Scanner is showing alerts whenever Discovery Attender runs a search.

Virus scanners may issue alerts when searching items with *Discovery Attender*. These are actually alerts based on attachments or files being searched by *Discovery Attender* locally. *Discovery Attender* will search files in memory when it can, however, some attachments and files require export in order to parse properly.

The path for each of the alerts should be in the \Temp folder which is the default location for exporting search items (if needed). The Anti-Virus catches a virus and issues an alert as *Discovery Attender* opens the file for scanning. The file location of the original item (mailbox, PST or file path) can be identified by looking at the task processing logs as *Discovery Attender* will issue an error for this attachment or file when it cannot search because of the Anti-Virus lock.

Disabling the Anti-Virus is not advisable, but you may want to scan your data stores for Viruses before beginning a search.

The log files lists the following error:

Unable to access file details for: <file name> System.IO.PathTooLongException: The path is too long after being fully qualified. Make sure path is less than 255 characters.

This is a technical limit to the length of both the path and name of the file. For many networks and most versions of Windows it is 255 characters. The only way to get round this would be to make the share or file name shorter. So for example if your F: share is pointing to \\Server\Share, try making a new share that points several directories deeper as in \\Server\Share\Sub1\Sub2\Sub3.

The following error is received when trying to search or export to PST files:

ERROR: Unable to open email store
DETAILS: sherpaSoftware.MAPITools.mapiCantOpenStoreException: (@08055378) Mail service Personal Folders File (.pst) was not found, check the [Services] section of the MAPISVC.INF file: (#1054)
at sherpaSoftware.MAPITools.PST.OpenPST(String szFileName)
at daProcess.taskPerformMapiSearch.PerformTask(iTaskSession oSession, iTaskLogging oLogging)

[07:11:50 Jul-28] Discovery Attender processing done.

This error usually occurs in one of the following scenarios:

- **Outlook is not installed** - The proper MAPI drivers are not installed. Install Outlook and try again. If you have installed Discovery Attender on an Exchange Server (not recommended), try running the fixmapi.exe found on the local hard drive.
- **Some version of Exchange administrator tools is the same machine as Discovery Attender** There is confusion as to which set of MAPI drivers should be used. Run the fixmapi.exe tool found on your local hard drive. This should resolve the MAPI conflicts.

If none of these options resolve your issue, call [technical support](#).

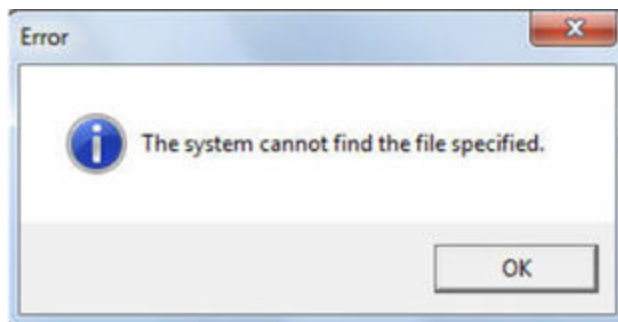
Tasks are failing with the following error:

ERROR: Task process no longer responding

This error usually occurs when you are searching large file shares, or very large mail stores. To resolve, navigate to *Tools | Settings | General Tab* and increase the Watchdog Time Out to at least 60 minutes.

If you are searching a large file share, please see [Searching Large File Shares](#) for more helpful suggestions.

When searching NSF files, 'the system cannot find file specified' dialog box pops up. Once 'OK' is clicked, search continues.



Apparently certain anti-virus programs modify the notes.ini file, which, in turn, causes this issue.

Removing these lines from the notes.ini file will resolve the issue:

```
ADDINMENUS = NCMENU  
EXTMGR_ADDINS = NCEXTMGR
```

When attempting to search any Exchange Mail Stores or PST files, a MAPI_E_CALL_FAILED error is generated.

This could be caused by a variety of issues around the fact that the MAPI system is failing to initialize according to Discovery Attender:

- 1) The bitness of Outlook and Discovery Attender does not match. This occurs if you have a 64-bit version of Outlook installed and a 32-bit version of Discovery Attender, or a 64-bit version of Discovery Attender

and a 32-bit version of Outlook.

Resolution : Install the correct version of Outlook or Discovery Attender.

2) You do not have Outlook set as your default mail client and another mail client is set as the default

Resolution:

- Go to your operating system's *default program list* and set Outlook as the default mail program
- Go to your operating system's *program access and computer defaults* and set the default email program to Outlook

3) The MAPI libraries within Outlook have become corrupted

Resolution: - Locate and run fixmapi.exe If the issue still persists, please contact technical support

Attachments are Skipped and Unable to be Searched due to the following error:

SKIP: Unable to convert attachment to perform keyword search

DETAILS: Could not load file or assembly 'dtSearchNetApi2, Version=1.0.4034.41264, Culture=neutral, PublicKeyToken=null' or one of its dependencies. This application has failed to start because the application configuration is incorrect. Reinstalling the application may fix this problem. (Exception from HRESULT: 0x800736B1)

The required Microsoft Visual C++ 2005 runtime libraries have been corrupted, are the incorrect version, or are not installed correctly. To resolve this, reinstall Microsoft Visual C++ 2005 available below. Once you have reinstalled this file, please ensure you reboot your machine prior to re-starting your search.

Microsoft Visual C++ 2005:

<http://www.microsoft.com/en-us/download/details.aspx?id=14431>

Please Note: Discovery Attender requires correct versions of the 2005 and 2008 C++ run time libraries to be installed correctly.

Keywords are not highlighting in Preview Pane or Text Viewer or the preview lists [No Match]

There are several reasons that keywords may not be showing up in the Preview Pane or Text viewer. Keep in mind that the search engine does not use the same methodology as the preview pane, so this is not an uncommon scenario.

1) The hit is in an unviewable part of the document. The keyword snippets stored with the keywords usually gives an accurate representation of where a hit was found, however, this location may not be visible in the preview pane. Examples of this are if the hit was found in raw data, document comments or non-visible notes.

2) A regular expression is responsible for the keyword hit. Regular expression patterns often match a large chunk of text which cannot be accurately translated into a single highlight. Discovery Attender's Regular Expression syntax, does not translate well into that of the preview pane.

3) The result matched criteria other than the keyword. This happens in cases where there is either no keyword criteria or there is mixed criteria where a match could be made without the keyword (i.e. Keywords or Address option).

If a document is not showing the keyword hits, then the best way to figure out what hit and where, is to use the Right-Click | View | Keyword Details option to see a list of keywords for that particular result, including the snippet and location of the hit.

Issues with searching NSF files

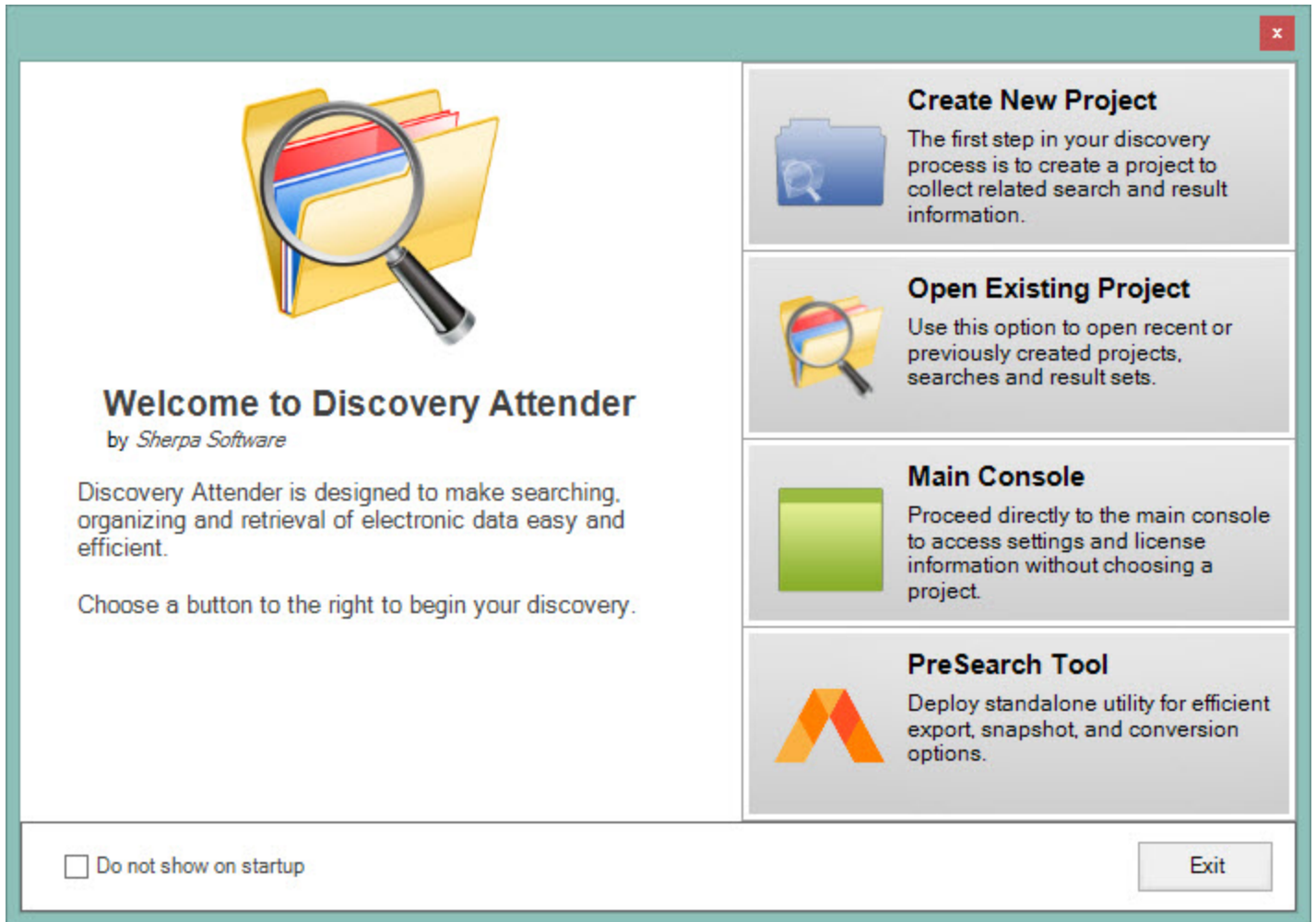
1) Verify all the steps in [Searching NSFs](#) have been done.

Error connecting to all searches (databases) after new install

This is likely caused by a mismatch between the bitness of Discovery Attender and the bitness of the version of Office or Outlook installed. If one is 32-bit, so must the other be 32-bit.

Welcome Screen

This is the introductory screen to Discovery Attender. It presents a number of options upon opening the application, allowing access to the components of the program.

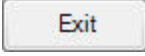


If you are just starting with *Discovery Attender* please refer to [WHERE_TO_BEGIN](#) .

Functionality

This screen is used to navigate to the different sections of the application. From this screen a new project can be created, an existing project can be opened, or you can proceed to the *MAIN CONSOLE* for modifying default settings or opening the *PreSearch Tool*.

Option	Description
Create Project	Opens the NEW_PROJECT_SCREEN for the creation of a new project.
Open Existing Project	Opens the PROJECT_SELECTION_SCREEN to give the users a choice to open a project from the list of recent Discovery Attender projects.
Main Console	Opens a blank MAIN_CONSOLE with no project selected. Although no new searches can be created, this view is useful for modifying default settings.

	Please note: If you open the <i>MAIN CONSOLE</i> with an empty project and need to create a new search, simply choose the <i>File Create New Project</i> from the file menu to create a project to house new searches. Alternately, you can select <i>File Open Project</i> to open the <i>PROJECT SELECTION SCREEN</i> or the <i>File Recent Projects</i> to see the list of recently accessed projects.
PreSearch Tool	Opens the PreSearch Tool , a separate utility included with Discovery Attender. The PreSearch Tool has numerous functions that assist in the processing and analysis of data. Some of these functions are duplicated in Discovery Attender itself, but the PreSearch tool runs significantly faster, but with less logging.
	Clicking this button will close the program.
Do not show on startup	Checking this option will disable this <i>WELCOME SCREEN</i> . Instead, the PROJECT SELECTION SCREEN will open upon the launch of the application.

Discovery Attender License Key

When running the full version of *Discovery Attender* for the first time, you will be required to enter your License Key in order to take full advantage of all the product features.

The screenshot shows a window titled "Discovery Attender" with a close button in the top right corner. The window has a blue header bar with the text "Welcome to Discovery Attender". Below the header, there is a section titled "License Key" with a blue border. Inside this section, the text reads: "Either the evaluation period has elapsed or your temporary license key has expired. Please enter a new key below. Click 'Save' when done. To enter the key at a later time, click 'Cancel'." Below this text, there is a link: "Enter Discovery Attender License Key" followed by a text input box. Underneath that is another link: "Enter SharePoint License Key (optional)" followed by another text input box. Below the "License Key" section is a section titled "User Information (Optional)" with a blue border. It contains the text: "Enter your User ID and PIN to help contact Support." Below this text are two input fields: "User ID:" followed by a text box, and "PIN:" followed by a text box. At the bottom right of the window, there are two buttons: "Save" and "Cancel".

Enter Discovery Attender License Key

To enable functionality in the full release version of *Discovery Attender*, a 25 character alpha-numeric license key is required. This license key is issued when *Discovery Attender* is purchased and is not needed for the standard evaluation version.

Enter your key in the box provided.

Enter SharePoint License Key (optional)

SharePoint file [searching](#) is an optional component in *Discovery Attender*, and requires a separate license key. To enable this functionality in the release version, enter your 25 character alpha-numeric SharePoint license key in the box provided

-

User Information (Optional)

User Information is optional, but will provide an easy reference when contacting technical support.

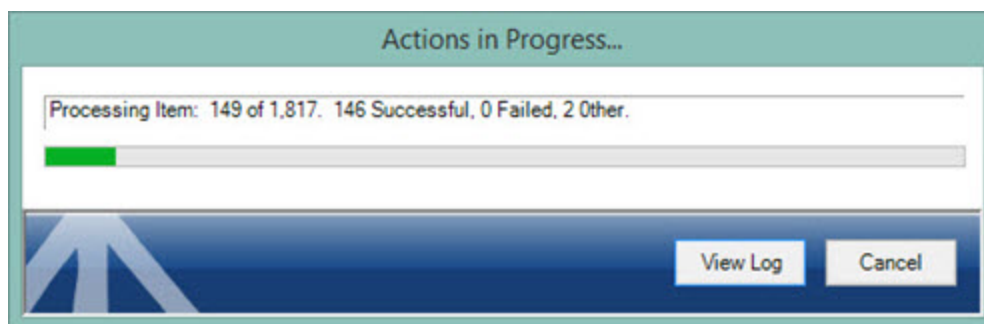
Click '**SAVE**' to enable the keys, store your optional values and close this form.

See Also

- [New Project Screen](#)
- [Project Selection Screen](#)
- [Main Console](#)

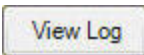
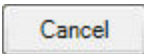
Action In Progress

This screen shows the progress of result [actions](#). It opens once the action processing has started and stays open until the action is complete. As each result item is processed (i.e. copied, moved or deleted), the statistics will increment based on the success of the action for that result. As the export progresses, the status bar expands to reflect the number of results processed to that point.

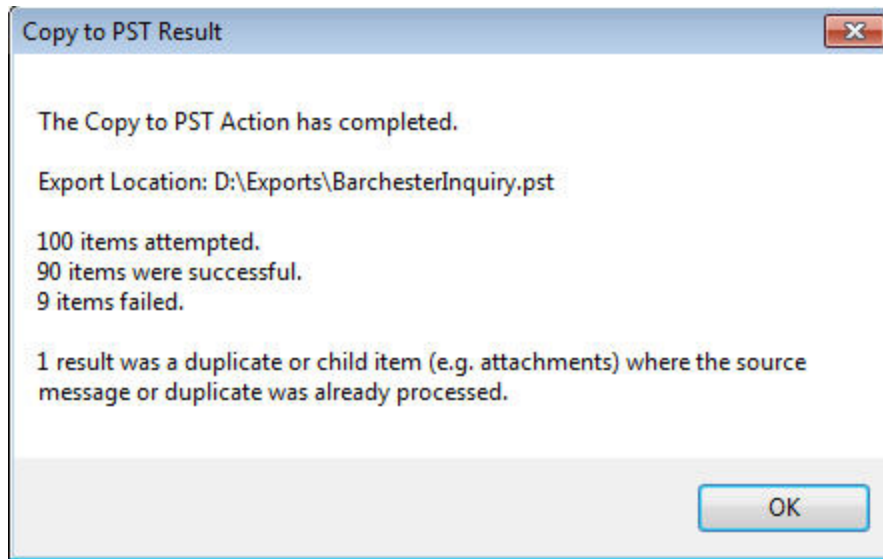


- If the result item processes successfully, the number of successful items will increment.
- If the action process fails on a given result, the number of failed items will be incremented. You can use the 'View Log' button to see the log file and what type of failures are being generated.
- 'Other' will only increment for results which contain email attachments. It is reserved for specific 'child' attachment results whose parent message has been exported already. To avoid duplicates, Discovery Attender will only process a specific message once. When a message is exported and all the attachments are included to maintain the parent-child relationship. Therefore, even if there are also separate results in Discovery Attender for individual attachments, the source email will only be exported once.

Buttons

	Opens the action log file while the actions are still running. The log file will list details about the actions as well as any errors encountered during the process. Make sure to close the log file once you have viewed the contents, so it can be updated.
	Stops the action process. The currently processing result item will finish, but no further results will be processed.

Action Result Summary



This screen presents a final summary of the action including the numbers attempted, failed, successful and any 'other' values. Other values can include attachments which were not copied because their source message was already exported, or items that were not completed if a search was canceled.

Clicking **OK** will close this dialog box. However, if any items failed during the processing of the results, a log file will open with the details of the action, including any issues that were encountered.

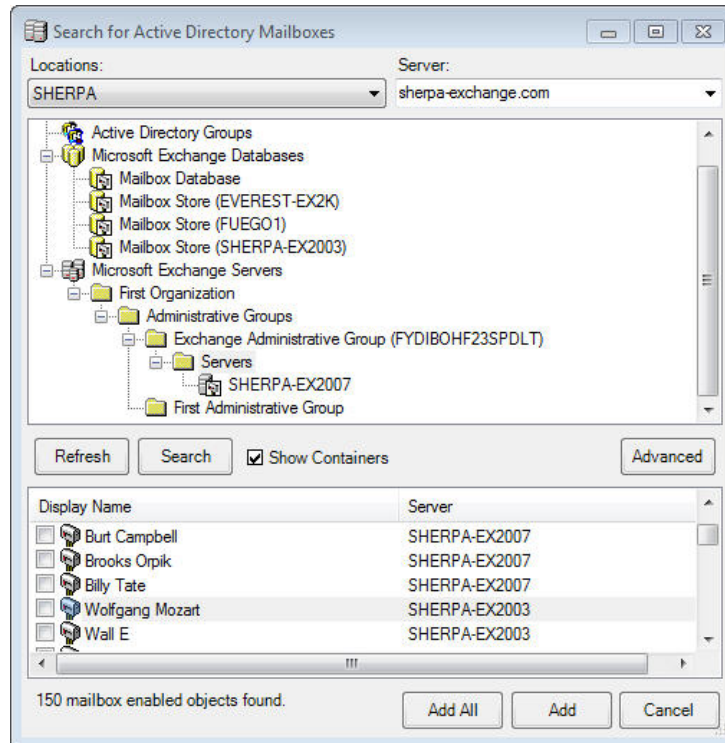
Please note: The action log file and statistics can also be accessed from the [Action History](#) view after the processing has completed.

See Also

- [Action Summary](#)
- [Action History](#)
- [Glossary](#)

Active Directory Selection

Exchange Mailboxes and Online Archives can be located by using this *SEARCH FOR ACTIVE DIRECTORY MAILBOXES* dialog box.



Please Note: Online Archives are associated with mailboxes in Exchange 2010 and above. To choose Online Archives, you will use this screen to choose the associated mailboxes. Keep in mind that mailboxes can be listed in Active Directory and not have associated Online Archives. This option cannot be used to connect to EWS (Office 365 or on premises).

Locations

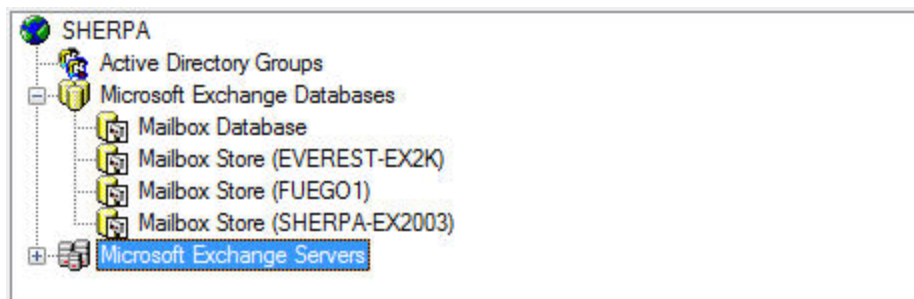
This drop down box shows a list of your active domains.

Server

Shows a list of domain controllers to query. If your domain controller is not listed in the Server dropdown or your domain is not listed in the Locations dropdown, then enter the fully qualified name of the domain controller in this box and click the **SEARCH** button to populate the list of mailboxes.

Domain Listing

Presents a tree view of all groups under the chosen domain or Active Directory group. Use these groups to select mailboxes by expanding views. Once you reach a view that contains the mail stores you want to include in your search, double click on the label. All mailboxes associated with that group will be entered into the mailbox list.



Mailbox List

This section lists the mailboxes selected up to this point. You can check individual mailboxes and use the **ADD** button to import only the selected mailboxes to the wizard. Alternately, use the **ADD ALL** button to include the entire set of listed mailboxes in the wizard selection.

Display Name	Server
<input type="checkbox"/> Theodore Cleaver	EX2010
<input type="checkbox"/> Wallace Cleaver	EX2010
<input type="checkbox"/> Walter Sobchak	EX2010
<input type="checkbox"/> Ward Cleaver	EX2010
<input type="checkbox"/> Willy Mayfair	EX2010

Buttons

<input type="button" value="Refresh"/>	Resets the domain listing to the defaults.
<input type="button" value="Search"/>	Uses the currently selected domain, server, or active directory group as a basis for searching out mailbox entries.
<input type="button" value="Advanced"/>	Allows you to enter your own custom search criteria over the selected active directory group or server.
<input type="button" value="Add All"/>	This option adds all the mailboxes from the mailbox list to the source form.
<input type="button" value="Add"/>	This option will add just the selected (checked) mailboxes from the list to the source form.
<input type="button" value="Cancel"/>	Closes this dialog box without any selections being made.

See Also

- [Select Exchange Mailboxes](#)
- [Select Online Archives](#)
- [Glossary](#)

Add/Edit Custom Exceptions

This dialog box allows you to add or edit details for an individual Custom Exception. It is reached from the Custom Exception management dialog box.

Edit Custom Exception: Image Files

Details

Name: Image Files

Group Name: FilesNotSearched

Notes: Listing of all image file types that are not searched because of text

Action: Ignore

Enabled?:

Type: File Type / Extension

Enter File Type (one per line)

```
*.jpg
*.jpeg
*.png
*.gif
*.tif
*.eps
*.bmp
*.raw
*.jif
```

OK Cancel

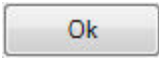
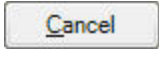
Custom exceptions currently have two choices for criteria - File Type / Extension and Messages Class. Once the custom exception is created, click '**OK**' to save the exception.

Options:

Name	Name of this exception. This will appear in the detailed task text log file as well as the combined exception log table.
Group Name	Optional field that can be used to group different custom exceptions together. Also appears in the log files.

	Note: This name should be one word and not contain spaces or punctuation.
Notes	User entered detail about the custom exception
Action	<p>For the custom exceptions there are two action that Discovery Attender can perform:</p> <p>Ignore: This option will ignore the document based on the defined list. No exception will be created, however it will be logged in the detailed text log if the 'Debug' option is enabled in the Settings.</p> <p>Create Exception: This creates an entry in the combined exception log with enough detail to allow the files or attachments matching the custom exception to be reported on, or exported.</p>
Enabled	Check this option to include this exception test as part of searching.
Type	The user can choose which criteria to use for this custom exception - File Type / Extension or Message Type / Class . Based on this choice, the lower part of the pane will change.
Enter file type (one per line)	<p>This portion is shown (see above) if the File Type / Extension is chosen as the criteria type.</p> <p>Use this text box to enter the list of file type criteria used to match the exceptions. Enter one type per line. Be sure to use the wildcards (e.g. *.jpg) if not using an exact name. Make sure each unique file type or name is on a single line.</p>
Select Message Types	<p>This portion is shown if the Message Type / Class is chosen as the criteria type.</p> <p>Check the associated types that you would like use to create a custom exception. If you would like to use custom types, select the 'Custom Message Classes' option and then list the classes one per line. We recommend you use wildcards (e.g. *SMIME*) to ensure proper matching.</p> <p>Select Message Types</p> <p><input type="checkbox"/> Emails and Drafts <input type="checkbox"/> Contacts</p> <p><input type="checkbox"/> Calendar Entries & Invitations <input type="checkbox"/> Tasks</p> <p><input type="checkbox"/> Archive Attender Stubs <input type="checkbox"/> Journal Entries</p> <p><input type="checkbox"/> Notes <input type="checkbox"/> All Other Types</p> <p><input type="checkbox"/> Custom Message Classes (One per line, wild cards accepted)</p> <div style="border: 1px solid gray; height: 80px; width: 100%; margin-top: 5px;"></div>

Buttons:

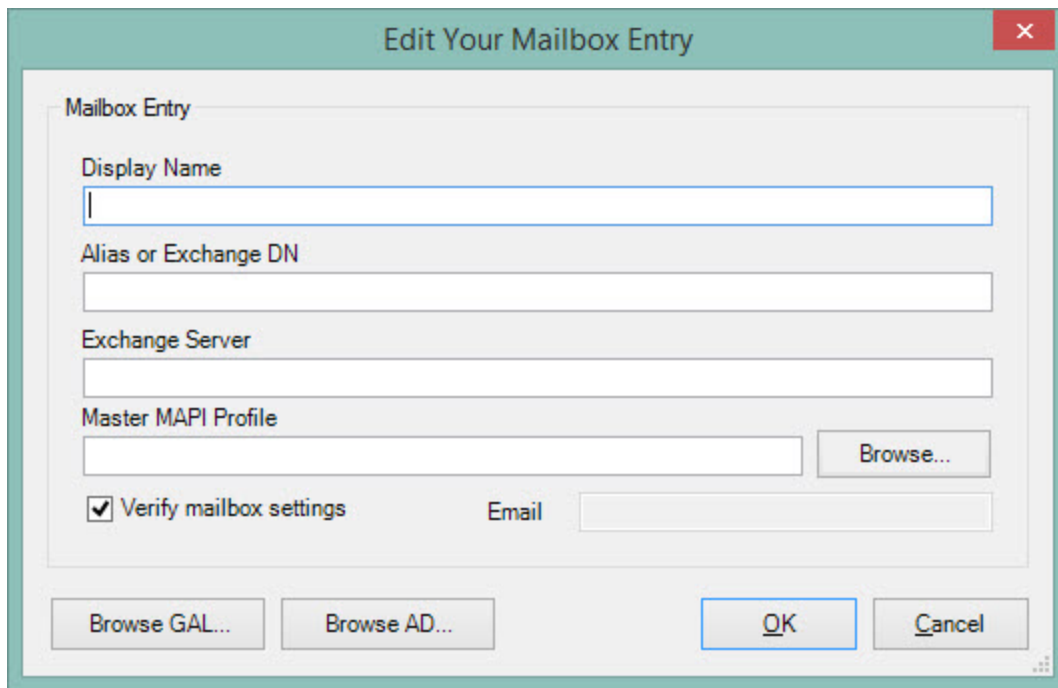
	Saves the entries and processes the enabled exceptions for the next search created.
	Leaves this dialog without saving the entries.

See Also

- [Custom Exceptions](#)

Add/Edit Mailboxes

This dialog box allows you to add or edit details for Mailboxes. It is reached from any wizard screen for selecting on-premises mailboxes or online archives.


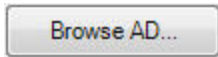
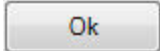



Options:

Display Name	This is the name of the mailbox to include in the search.
Alias or DN	The internal address or alias used for this mailbox.
Exchange Server	The fully qualified name of the server that hosts the mailbox.
Master MAPI Profile	The profile that accesses an account with administrator privileges. The BROWSE button will open the profile list from Outlook which allows the user to choose from the list which then automatically populates this value.

	Note: If the default profile is chosen in Settings, this option may not be needed.
Verify mailbox settings	Check this box to test the connectivity to this mailbox. If the mailbox fails connectivity, please contact technical support.
Email	The email address associated with the account chosen in the form. This field cannot be edited.

Buttons:

	Browse the Global Address List to select the Mailbox
	Browse Active Directory to select the mailbox.
	Saves the entries and enters them into the wizard screen mailbox list. Please note: If unusable information is entered (e.g. invalid email address) then a warning will appear.
	Leaves this dialog without saving the entries.

See Also

- [Select Exchange Mailboxes](#)

Add/Edit EWS (Office 365) Mailboxes

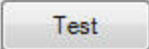
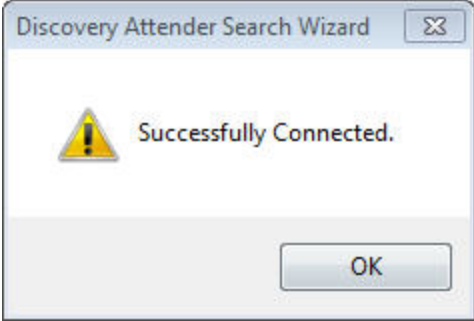
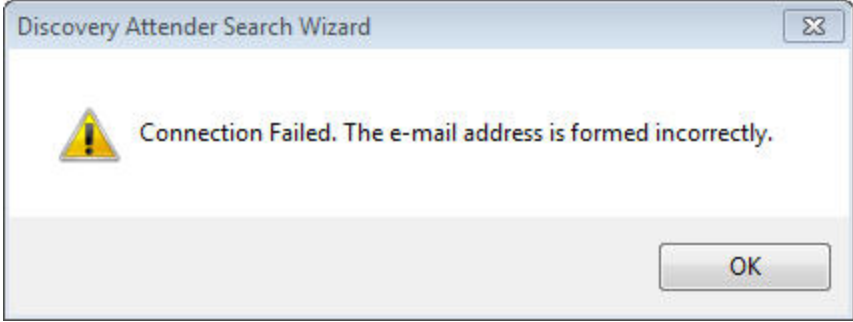
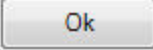
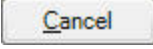
This dialog box allows you to add or edit details for EWS Mailboxes or Online Archive accounts. This option can be used to access on-premises data stores in Exchange 2013 or higher as well as the cloud based Office 365.

Once the mailbox account and access options are selected, please use the **TEST** button to verify the connectivity to the account before proceeding.

Options:

Mailbox Account to Search	This is the EWS (Office 365) Mailbox to search. Be sure to enter the entire address, e.g. <i>tuser-@sherpasoftware.com</i>
Office 365 Mailbox Details	
Connect with Default Settings	Select the account you wish to use to connect to the account listed in 'Mailbox Account to Search'. These accounts are listed in the EWS Options node in the <i>Settings</i> . If you only have a single set of credentials, you do not need to change this option. Note: This option is the default.
Connect Directly Using Mailbox Password	Enter the password for the mailbox account to access it directly.
Connect Through Alternate Administrator Account	Enter the details for an alternate impersonation account not listed in the settings.

Buttons:

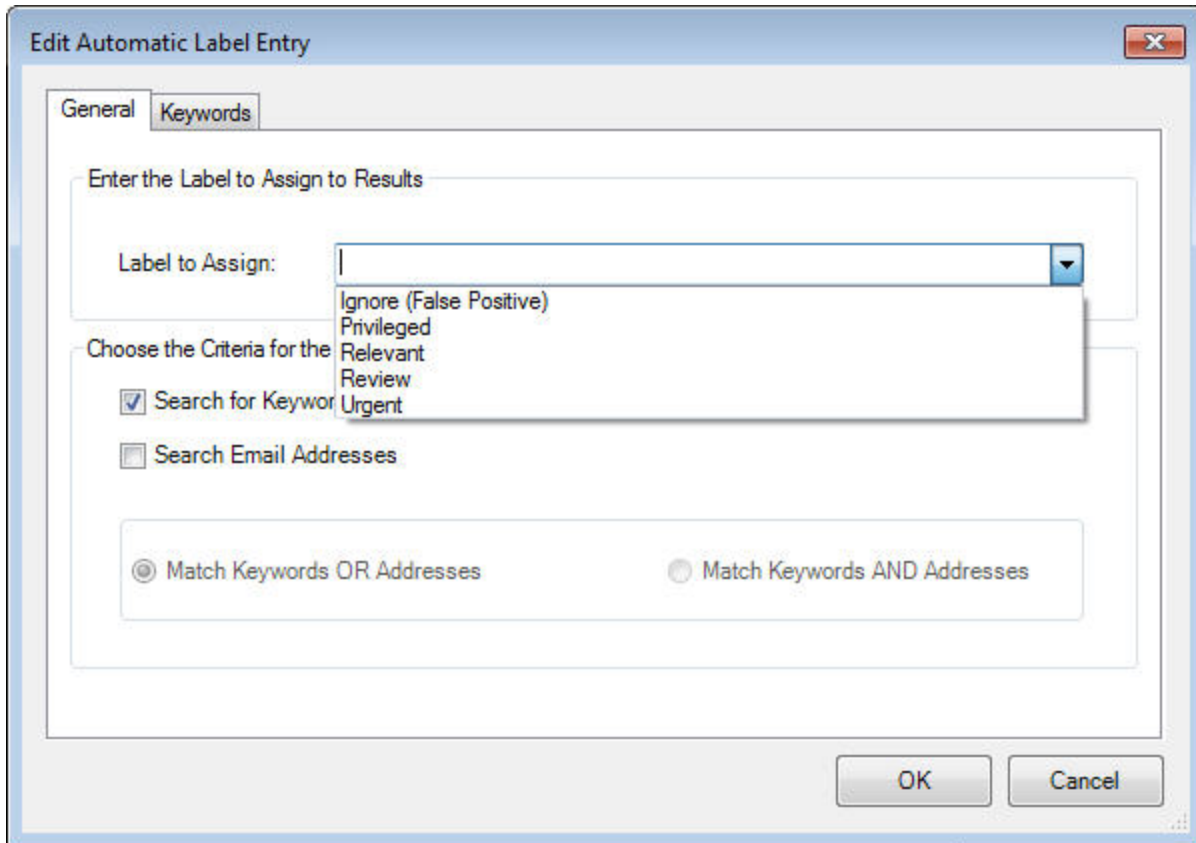
	<p>This option tests the EWS Mailbox (Office 365) settings entered in this screen. A dialog box will indicate if the test was successful:</p>  <p>If the connection test fails, the dialog box will indicate a cause, for example:</p> 
	<p>Saves the entries and enters them into the wizard screen mailbox list.</p> <p>Please note: If unusable information is entered (e.g. invalid email address) then a warning will appear.</p>
	<p>Leaves this dialog without saving the entries.</p>

See Also

- [Select EWS \(Office 365\) Mailboxes](#)
- [EWS Mailbox \(Office 365\) Settings](#)

Create and Edit Automatic Labels

Using this dialog box, a user can create and edit the secondary set of criteria needed to assign a single label to matching result items. This dialog is reached from the [Create Automatic Labels](#) wizard page. The labels assigned using this secondary set of criteria are referred to as Automatic Labels, or simply, Autolabel.



To create an Automatic Label, utilize the following steps:

Step 1	Select a Label to Assign
Step 2	Choose the Criteria
Step 3	Populate the Keyword criteria
Step 4	Populate the Address criteria (if selected)
Step 5	Review your criteria and finish.

Step 1: Assign a Label

Enter the Label to Assign to Results

Label to Assign:

Select the label you'd like to assign from the drop down list or enter a new label. The drop down list is populated from the labels listed in the [Organization](#) node in the [Settings](#) dialog. You can also enter a label directly into this box.

Step 2: Choose the Criteria

Choose the Criteria for the Label

Search for Keywords

Search Email Addresses

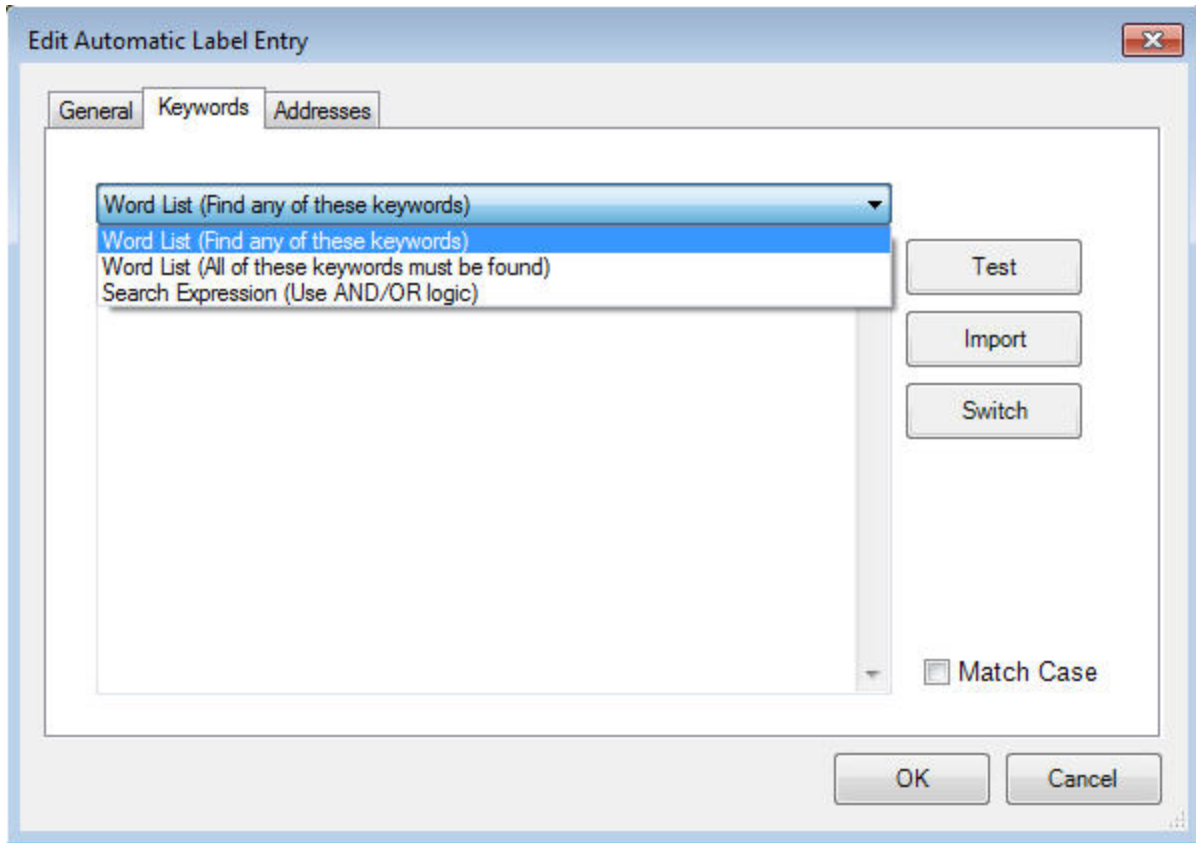
Match Keywords OR Addresses Match Keywords AND Addresses

Select an option for the type of criteria you want to use for this automatic label. Your selection will determine which tabs appear for further refining the criteria for this automatic label.

Search for Keywords	Enable Keyword criteria to use for creating an automatic label
Search Email Addresses	Enable Address criteria to use for creating an automatic label
If you select both Keyword and Address criteria, you will have a choice in how to evaluate the criteria	
Match Keywords OR Addresses	The label will apply to an item which matches Either the Keyword OR Address criteria.
Match Keywords AND Addresses	Both Keywords AND Addresses criteria must match for an item to be labeled.

Step 3: Populate Keyword Criteria (if selected)

When Keyword criteria is [selected](#) in the General tab, a new tab page is created which allows a user to enter criteria for Keywords. This tab works very much like the [Choose Keywords](#) wizard page.

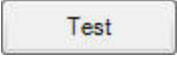
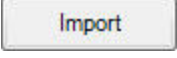
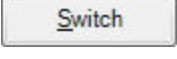


Drop Down List:

Use the drop down list to tell Discovery Attender how to evaluate the keyword criteria, then enter the keyword criteria in the text box.

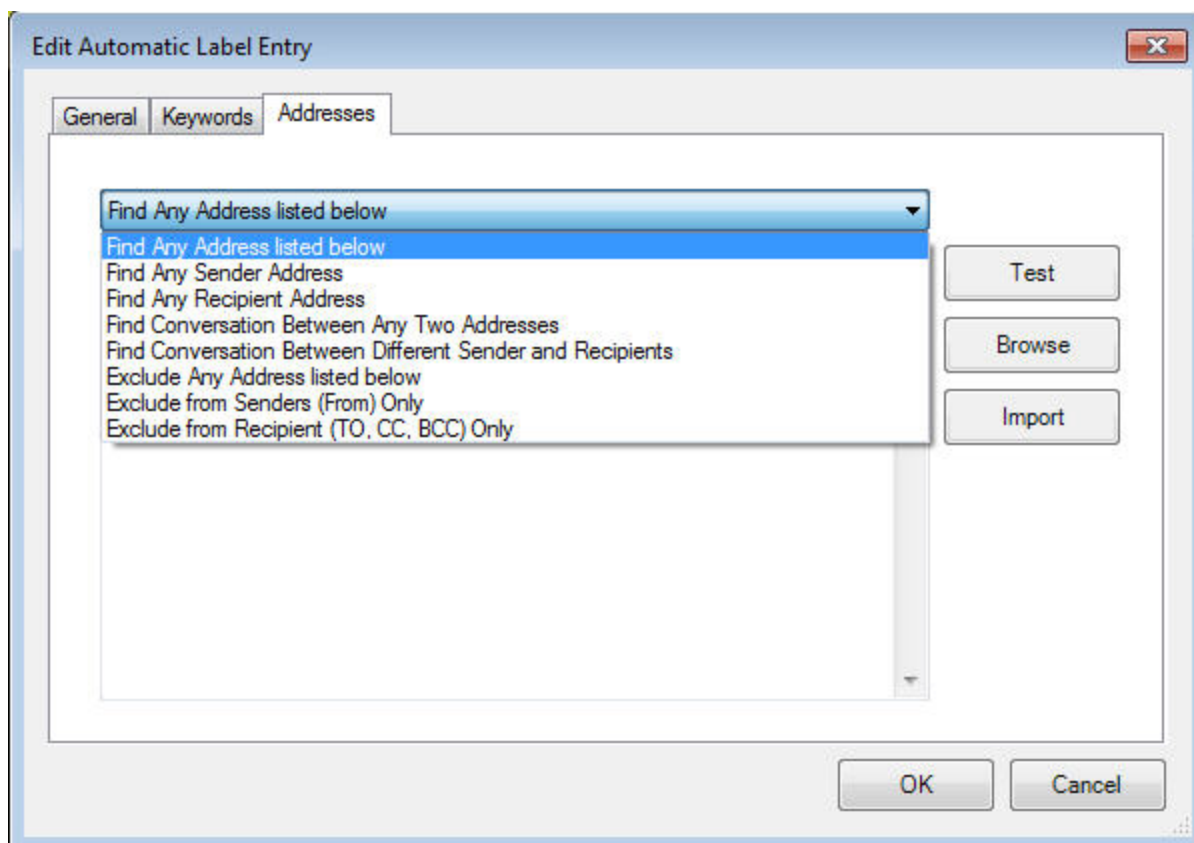
Word List (Any)	Find *Any* of the keywords in the list. Keywords are evaluated one per line.
Word List (All)	To be labeled, an item must match *All* the keywords in the list.
Search Expression	Utilize a search expression with Boolean logic to label matching result items.

Buttons:

	Description
	Opens the keyword tester to help validate the keyword criteria.
	Allows you to import a list of keywords or a search expression from a text file.
	Converts a keyword list to a search expression, or converts a search expression to a keyword list.
Match Case	This option will only return a hit if the exact case is matched. Please note: All items listed will be subject to this options.

Step 4: Populate Address Criteria (if selected)

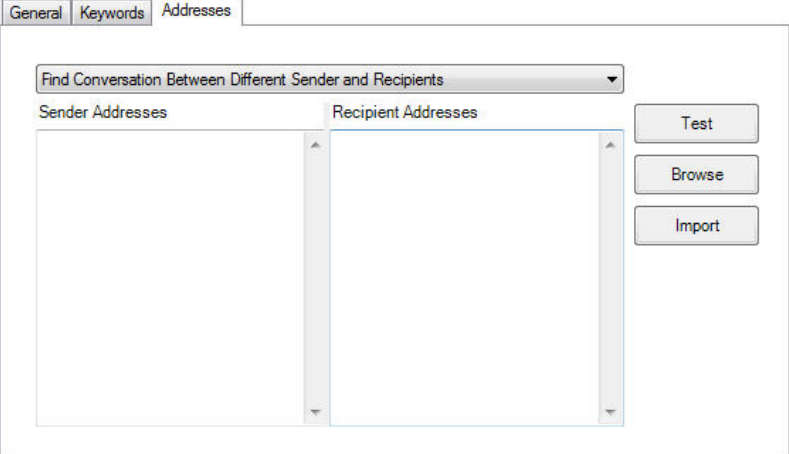
When address criteria is [selected](#) in the General tab, new tab page is created which allows users to enter address criteria. Only email result items (messages and attachments) will be labeled when using this criteria. This tab has much of the functionality of the [Choose Addresses](#) wizard page and follows the same logic.



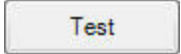
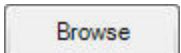
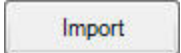
Options

Use the drop down list to tell *Discovery Attender* how to evaluate the address criteria entered in the box below.

<i>Find Any Address</i>	Labels any result which matches any address in the list
<i>Find Any Sender</i>	Labels any result whose sender matches an address in the list
<i>Find Any Recipient</i>	Labels any result with a recipient address in the list
<i>Find Conversation Between Two Addresses</i>	Only labels results where both the sender and at least one recipient are in the list
<i>Find Conversation Between Different Sender and Recipients</i>	Labels results where the sender is from one list and at least one recipient is from the other. The screen will change to this view.

	
Exclude All Addresses	Labels all email results Except those whose sender or recipient matches the criteria.
Exclude Sender Addresses	Labels all email results Except those whose sender matches the criteria.
Exclude Recipient Addresses	Labels all email results Except those where a recipient matches an address in the criteria list.

Buttons:

	Description
	Opens the address tester to help validate the address criteria
	Allows you to browse the Global Address List for addresses to add to the criteria.
	Imports a list of addresses into this dialog box. Please note: Cut and paste is also permitted.

Step 5: Review Criteria and Finish

Clicking **OK** will save the criteria and add it to the list of automatic labels. Error messages will appear if any of the required fields are empty. In this scenario, correct the error and click **OK** to save.

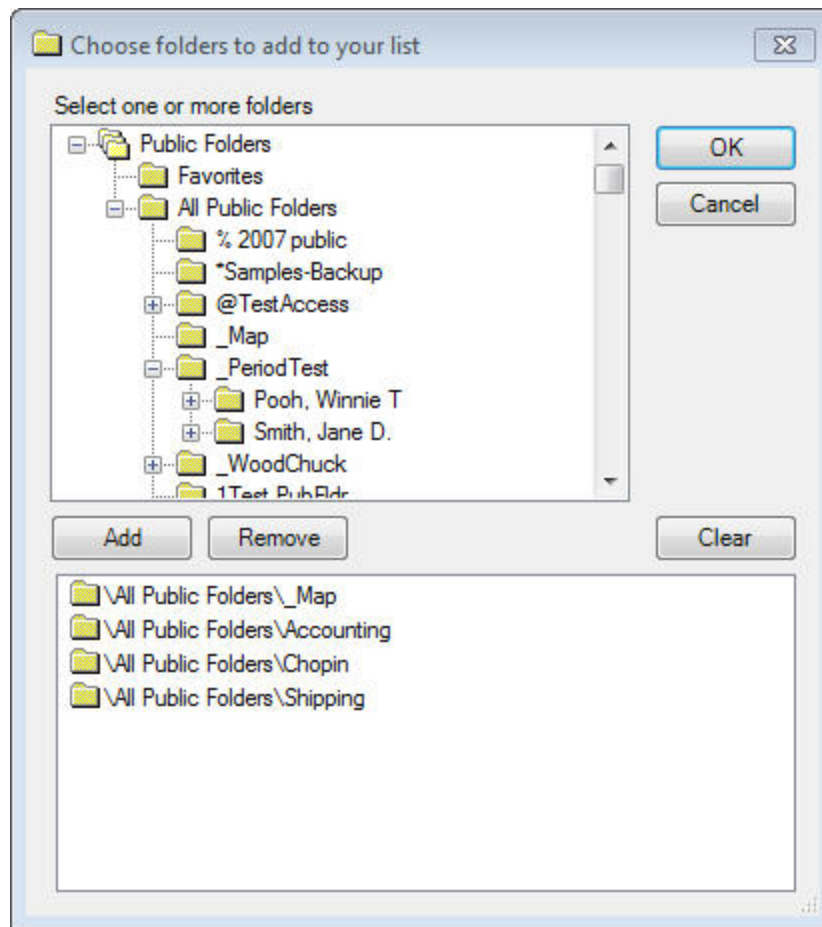
Clicking **CANCEL** at any time will close this screen without any changes being saved.

See Also




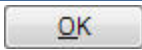
- [Create Automatic Labels](#)
- [Keyword Tester](#)
- [Address Tester](#)

Browse for Public Folders

This dialog box allows you to browse and select Public Folders from a list. The Public Folder list is based upon the permissions of the mailbox selected on the [Configure Public Folder Mailbox](#) search wizard page.



Double-Clicking a folder in the **Select one or more folders** section will add the selected folder to the list box. Folders from the chosen folder list box (the bottom half of the dialog) will be saved to the underlying wizard form once '**OK**' is clicked.

	Description
	Inserts the selected folder into the chosen folder list box.
	Removes the selected folder from the chosen folder list box.
	Empties the chosen folder list box.
	Clicking OK will add the folders in the bottom list box to the Public Folder list on the wizard screen. Please Note: If OK is clicked but no Public Folders are listed in the bottom list box, an error message will be shown.

<input type="button" value="Cancel"/>	Closes this screen without saving any changes
---------------------------------------	---

If you do not see a specific Public Folder as part of the list, please verify the mailbox used to access the Public Folder list has the appropriate permissions.

See Also

- [Select Public Folders](#)

Combined Exception Log

This form presents a list of exceptions encountered during a search. It is accessed via the [Summary of Results](#) on the [Main Console](#) and is mirrored in the *EXCEPTIONS* node in the [Result Summary](#).

Combined Exception List for Search: Hartford Files (Main) Files container focus								
Filter by: Type All Level All Item Type All								
Description	Type	Level	Detail	Item Type	Item Name	File Type	Date	Pa
Unable to parse text from fil...	Skip	Document	PDF file "\\owrid...	File	000001_Issue_...	.pdf	7/27/2010	\V
Unable to parse text from fil...	Skip	Container	\$E 0010 Invalid ...	File	compressed files...	.zip	9/27/2010	\V
Could not convert file to XM...	Wami...	Document	fileConvertErrorE...	File	compressed files...	.zip	1/1/2001	\V
Unexpected error when atte...	Wami...	Container	Error extracting z...	File	CSListView_dem...	.zip	11/4/2011	\V
Unable to parse text from fil...	Skip	Container	\$E 0010 Invalid ...	File	CSListView_src...	.zip	7/16/2007	\V
Could not convert file to XM...	Wami...	Document	fileConvertErrorE...	File	CSListView_src...	.zip	1/1/2001	\V
Unable to parse text from fil...	Skip	Container	\$E 0010 Invalid ...	File	dbTree_src.zip	.zip	2/25/2005	\V
Could not convert file to XM...	Wami...	Document	fileConvertErrorE...	File	dbTree_src.zip	.zip	1/1/2001	\V
Unable to parse text from fil...	Skip	Container	This file is encry...	File	pwd.zip	.zip	8/11/2008	\V
Could not convert file to XM...	Wami...	Document	fileConvertErrorE...	File	pwd.zip	.zip	1/1/2001	\V
Unexpected error when atte...	Wami...	Container	Error extracting z...	File	Test.txt.bz2	.bz2	3/3/2011	\V
Unable to parse text from fil...	Skip	Container	\$E 0010 Invalid ...	File	TwainRiverTrav...	.zip	3/3/2011	\V
Could not convert file to XM...	Wami...	Document	fileConvertErrorE...	File	TwainRiverTrav...	.zip	1/1/2001	\V

< 27 exceptions listed

This list of exceptions can be exported to a CSV file to provide a detailed report of the exceptions encountered during a search. Alternately, where possible, the items which threw the exceptions can be opened by double-clicking or exported to native format so they can be processed manually, or with other tools.

Please note: Exports of the exception items are only possible if they are of a file, attachment, or message type where access is still available. Invalid folders, inaccessible data stores, corrupt lists other types of non-document exceptions also cannot be exported.

Column Descriptions

	Descriptions
Description	Short description of the exception
Type	<p>Exceptions are broken down into several types to help distinguish the status.</p> <ul style="list-style-type: none"> • Error: An unexpected exception occurred to stop a portion of the search, which might be correctable. This can happen on the task, data store, folder, container or item level. Permission issues, various MAPI errors and file corruption are examples of this type of exception. • Skip: Items that Discovery Attender will not be able to process, a.k.a. a 'perpetual error'. Items of this type are unable to convert files for parsing, empty attachments, encrypted or password protected files. • Warning: These exceptions are notifications to the users that something happened that they should be aware of, but which did not compromise the search. Examples of this would be items that could not be saved to the cache, or issues with files inside a zip file. • Unknown: The cause of the exception is unknown and could not be classified.
Level	<p>Exceptions can take place in many locations. This column gives a general indication of what part of the process generated the error</p> <ul style="list-style-type: none"> • Container: This exception occurs on an item within a container. An example would be a password protected file compressed in a zip file. Other files in that compressed files may be searchable. • Data Store: The exception happened on the data store level. An example of this would be an Access or Network error. • Document: Attempting to search a message, attachment or file throws an exception. • File: Used for SharePoint search only, the exception is on a file level. • Folder: Querying or accessing a folder in a data store causes an exception. • Item: Exception was found on a SharePoint item level • List: Exception found on a SharePoint list level. • Task: Creating or launching a task throws an error. • Site: The exception occurred on a SharePoint site level.
Detail	More descriptive detail for the exception, if any.
Item Type	If this is a Document level error, what type of item are we dealing with: Message, Attachment or File
Item Name	If the exception is on the Document level, what is the item name.
File Type	If this is a file type, what is the extension (used for sorting types)
Date	On a document level, the received date for messages, modified date for files
Path	On document level, what is the path of the item (internal path, PST path, archive path, file path)
Subject	For email items only

Sender	For email items only
Export Path	If the exception item is exported using the Copy to File function, this lists the export path
Store Type	The data store type: Mailbox, Public Folder, PST, Archive, Path
Data Store	Name of the data store.
Group Name	The name of the grouping chosen for a custom exception .

Toolbar and Menu Options



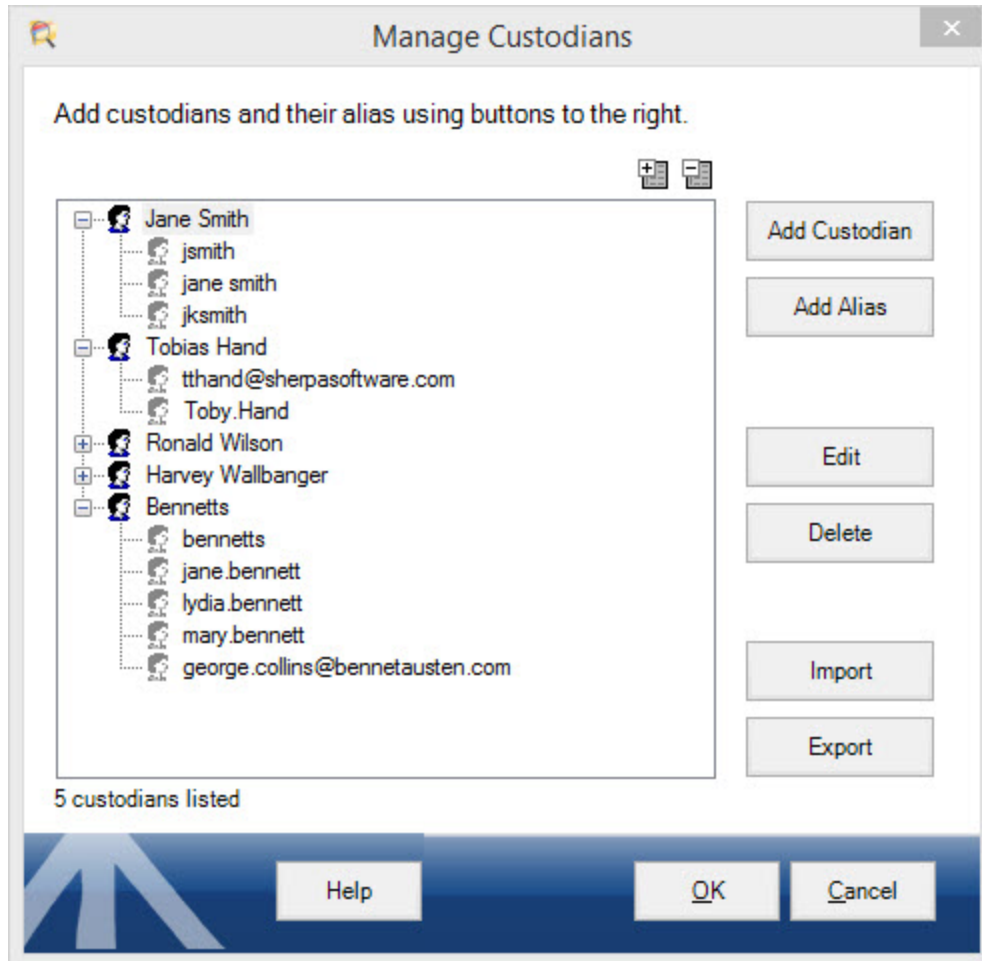
Refresh	On the toolbar only, refreshes the list of exceptions in an on-going search
Select All	Context Menu only, select all items in the list
Open	For document level results only, attempts to open the item. Useful for attachment results to see the source message, but most file and message errors will not be able to be opened.
Copy to File	For document level items only, copies the item referenced in the exception to a location chosen by the user. This option can be very useful for creating an exception set for production, however, not all exceptions can be exported. Files will be exported to Native format, while messages and attachments will be copied to MSG. This option is very similar to the Actions: <ul style="list-style-type: none"> • Verify the items you want to Copy for File • Select a Destination Directory • Watch the Action in Progress • View the log file if there are any errors exporting.
Copy to PST	For email items only (messages or attachments), this option copies source messages to PST file, maintaining any parent/child relationship. This means that the exported message will be an exact copy of the source message, including all attachments. The steps involved to export to PST include: <ul style="list-style-type: none"> • Verify the items you wish to copy to PST • Choose the PST option and the directory or file you wish to hold the exported items • Review the Actions in Progress • View the log files for items that could not be exported
Export to CSV	This creates a CSV file of this list of Exceptions.
Filter By:	Drop down boxes used to create filters by Exception Type , Level and Item Type .

See Also

- [Main Console](#)
- [Troubleshooting](#)
- [Handling Exceptions](#)

Manage Custodians Dialog

This screen allows users to view, add and modify custodians that will be referenced in this project. It is reached from the [Main Console Tools | Manage Custodians](#) menu and various *Organize | Manage Custodians* menu options in the [Results Management](#) screens.

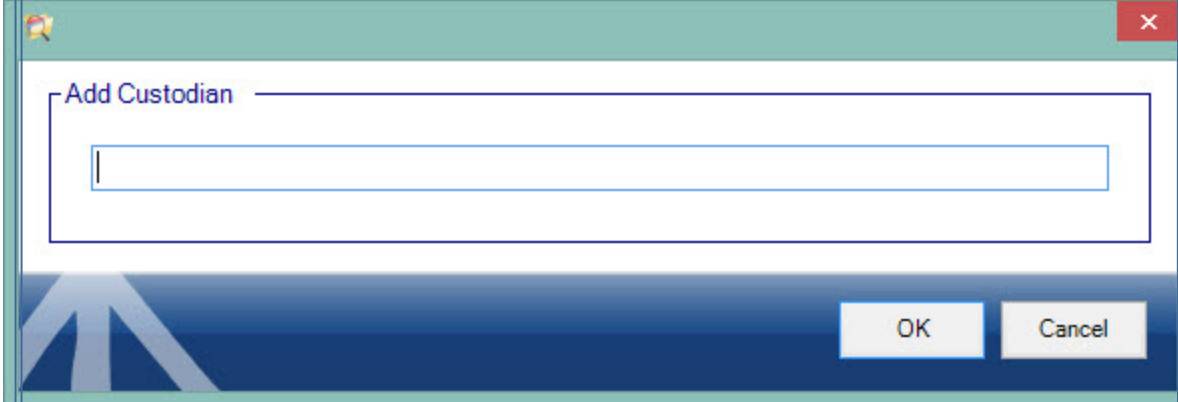



Description

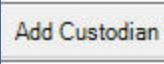
This screen is used to create and manage the custodian details that will be used when associating custodians with results. With *Discovery Attender*, users have a number of [methods](#) for working with custodians including manually or automatically [assigning](#) one or more custodians to [specific portions](#) of the result set.

The Custodian top level nodes list the descriptions of the custodians, while the aliases listed under each node act as the properties that uniquely identify those custodians for automatic assignment.

Steps

	Description
Step 1	<p>Create a new <i>custodian</i> by clicking the ADD CUSTODIAN button. The following dialog will appear:</p>  <p>Enter the name of the new custodian and click OK to save the entry.</p>
Step 2	<p>Add Aliases for the custodians. Select the custodian then click on the ADD ALIAS button. The following dialog will appear:</p>  <p>Enter a new alias, then click OK to save the entry.</p>
Step 3	<p>Click OK to save all the custodians.</p>

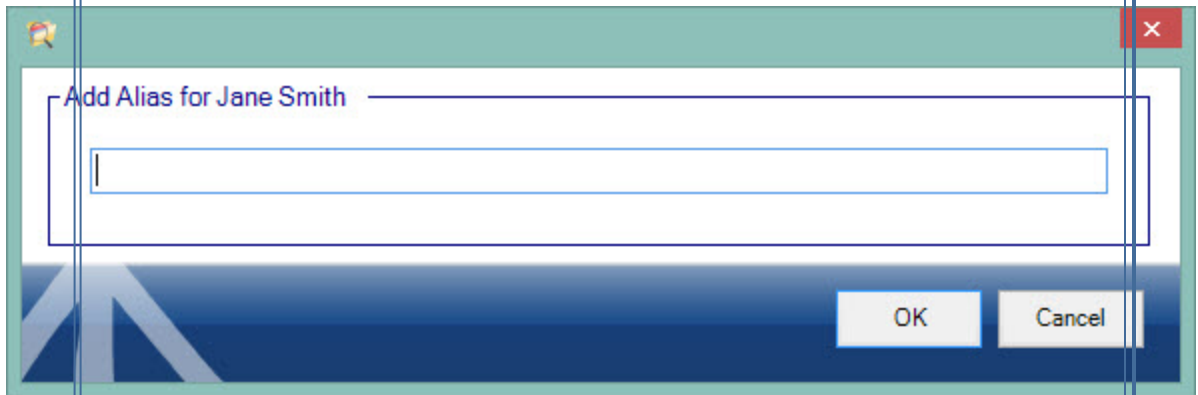
Buttons

	Description
	To create a new <i>custodian</i> , click the ADD CUSTODIAN button. The following dialog will appear:



Add Alias

To add a new **Alias** for a selected custodian, simply click on the **ADD ALIAS** button. The following dialog will appear:



Edit

Opens the edit form for the selected custodian or alias.

Delete

Deletes the selected custodian or alias from the list

Import

Imports custodians from .dact (*Discovery Attender Custodian Template*) files. These files are created by exporting the custodians using the **EXPORT** button below. You can access the files between projects and use this **IMPORT** button to add them to a new project list.

Export

Exports the list of custodians to a dact (*Discovery Attender Custodian Template*) file. Use the above Import button to import the custodians listed in the template to a new project.

Help

Opens this help page.

OK

Saves the entries to the template.

Please note: Until the **OK** button is selected, Custodians will not be saved to the template. Custodians that are not in the template can not be assigned to results.

Closes this form. No changes will be saved.

See Also

- [Manage Custodians](#)
- [Automatically Assigning Custodians](#)
- [Main Console](#)
- [Result Management](#)

Custom Exceptions

This screen allows users to view, enable, add and modify custom exceptions. It is reached from the *Tools | Custom Exceptions* menu option on the [Main Console](#).

The screenshot shows a window titled "Custom Exceptions" with a close button in the top right corner. Below the title bar, there is a text instruction: "Add custom exceptions using buttons to the right." The main area contains a table with 7 columns: Name, Type, Group Name, Description, Criteria, Action, and Enabled. To the right of the table are five buttons: "Add...", "Edit...", "Delete", "Enable", and "Disable". At the bottom left of the window, it says "11 exceptions listed". At the bottom of the window are three buttons: "Help", "OK", and "Cancel".

Name	Type	Group Name	Description	Criteria	Action	Enabled
Archives	Message Type / ...	EmailNotSearc...	Stubbed email i...	*vault*,*aa*	Ignore	Yes
Database Files	File Type / Exte...	FilesNotSearc...	This lists databa...	*.mdb,*.accdb,*.sql,*.db,*.db	Create E...	Yes
Developer Files	File Type / Exte...	FilesNotSearc...	List of files type...	*.vb,*.rsex,*.c,*.php,*.pdb,*....	Ignore	Yes
Encrypted	File Type / Exte...	Encrypted	Attachment typ...	*.smime,*.pk7	Create E...	Yes
Image Files	File Type / Exte...	FilesNotSearc...	Listing of all ima...	*.jpg,*.jpeg,*.png,*.gif,*.tif,*.e...	Ignore	Yes
Music Files	File Type / Exte...	FilesNotSearc...	Listing of music ...	*.mp3,*.wav,*.wma,*.m3u,*.mi...	Ignore	Yes
Other mixed text	File Type / Exte...	MixedText	Other types of ...	*.TIFF,*.xml,*.prop*	Create E...	No
PDF Files	File Type / Exte...	MixedText	Files need to be...	*.pdf	Create E...	Yes
SMIME	Message Type / ...	Encypted	Messages class...	*SMIME*	Create E...	Yes
System Files	File Type / Exte...	FilesNotSearc...	List of applicatio...	*.exe,*.dll,*.msi,*.iso,*.dat,*.b...	Ignore	Yes
Video Files	File Type / Exte...	FilesNotSearc...	Media files that ...	*.mov,*.avi,*.mpg,*.mp4	Ignore	Yes

Description

This screen is used to create and manage custom exceptions. This functionality is helpful in aiding custom grouping, auditing and reporting of non-searchable documents based on file type or message class. Custom exceptions are set and enabled on an application level. Any project will follow the settings listed here.



Users have a choice of two types of actions for enabled custom exceptions, 'Ignore' or 'Create Exception'. These actions will take places before any other standard criteria is processed.

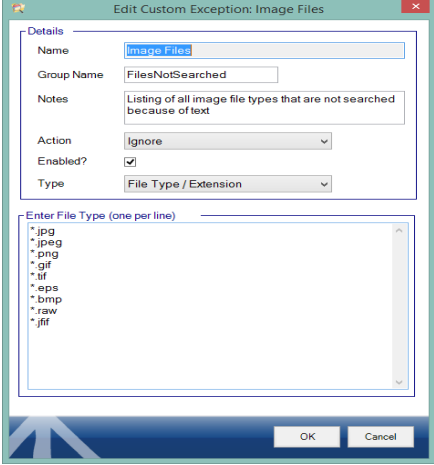
- The '**Ignore**' option will simply ignore any files of the types listed and files of the types listed will not be searched. If logging is set to '**Debug**' then items that match the ignore criteria will be entered in the task log file during the search.
- The '**Create Exception**' option will create an entry in the [Combined Exception Log](#) for any files that match the file type criteria set up in these custom exceptions. At that point users will be able to open, export, or create a report for any items that matched the custom exceptions.

Please note:

- Files found in compressed container files (e.g. .zip, .tar, .rar) must first follow the Container Files setting of '**Folder**' or '**Single File**'
- The Custom Exceptions are processed before the '[File Name and Type](#)' or '[Message Type](#)' wizard criteria. Therefore if you Ignore an item using a custom exception, that file or message cannot be searched even if you include it in the wizard criteria.

Buttons

	Description
	<p>This buttons opens the <i>ENTER CUSTOM EXCEPTION</i> dialog for creating a new custom exception.</p> 

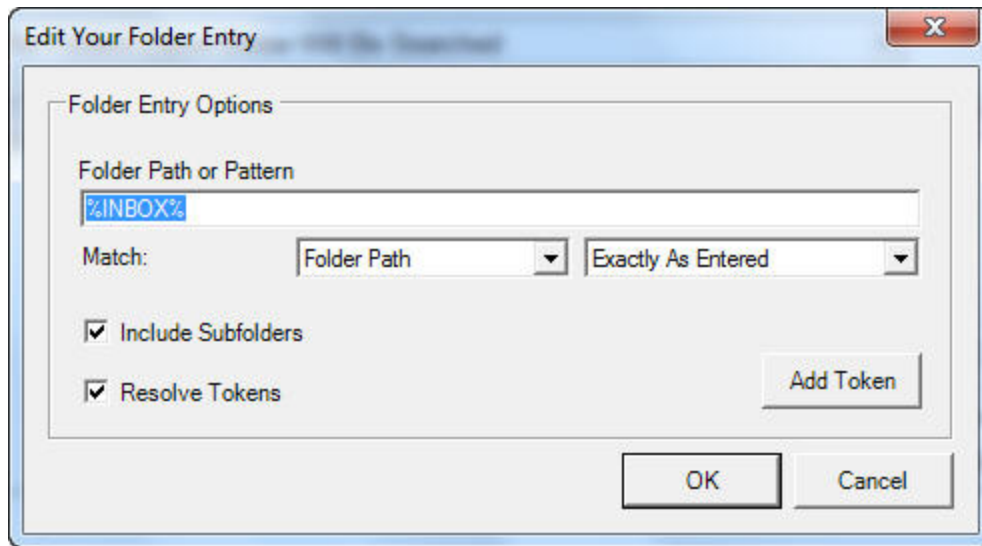
<p style="text-align: center;">Edit</p>	<p>Opens the <i>EDIT CUSTOM EXCEPTIONS</i> dialog to edit the currently selected exception.</p> 
<p style="text-align: center;">Delete</p>	<p>Removes the currently selected exception.</p>
<p style="text-align: center;">Enable</p>	<p>Enables the currently selected exceptions so they will be deployed for any future searches.</p>
<p style="text-align: center;">Disable</p>	<p>Disables the currently selected exceptions so they will not be used in any future searches.</p>
<p style="text-align: center;">Help</p>	<p>Opens this help document.</p>
<p style="text-align: center;">OK</p>	<p>Saves this list of custom exceptions</p>
<p style="text-align: center;">Cancel</p>	<p>Closes this form without saving any of the changes.</p>

See Also

- [Add / Edit Custom Exceptions](#)
- [Container Files](#)
- [Main Console](#)

Add or Edit a Folder Entry

This dialog box allows you to add or edit a folder for inclusion in a folder list. It is accessed from the [Select Public Folders](#), [Select Email Folders](#) or [Select NSF Folders](#) wizard pages.



Options

	Description
Folder Path or Pattern	The name or path of the folder entry. It can contain wildcards or tokens.
Match	Gives choices on how the folder should match:
<div style="border: 1px solid black; padding: 2px;"> Folder Name Folder Path </div>	
<i>Folder Name</i>	Matches the exact name of the folder.
<i>Folder Path</i>	Matches the Path of the folder.
<div style="border: 1px solid black; padding: 2px;"> Exactly As Entered Like Pattern RegEx Pattern </div>	Describes how the folder entry will be evaluated.
<i>Exactly As Entered</i>	The exact folder will be used as entered. The folder will not be found if it does not exactly match the given text. For example, an entry of Account will not match a folder called Accounting .
<i>Like Pattern</i>	Wildcards are processed for the folder entry.
<i>RegEx Pattern</i>	Regular Expression patterns are parsed for the folder entry.
Include Subfolders	Check this to include all the subfolders of the matching folder entry as part of the search.
Resolve Tokens	Check this if the folder entry contains tokens.
<div style="border: 1px solid black; padding: 2px; display: inline-block;"> Add Token </div>	Allows the user to choose a token (pre-defined folder) from a list of appropriate tokens per searched mail store.

See Also

- [Select Public Folders](#)
- [Select Email Folders](#)
- [Select NSF Folders](#)

Export File Name Format

This form allows you to create a custom export file name for use when a file result is exported using any ['Export to Individual File'](#) actions. It is also accessible from the [Export to File](#) options in the Settings.

Export File Name Format

Build Name Format with Tokens

Use token(s) listed below to create a custom name for the exported file. The Up and Down buttons will change the order of selected tokens.

Selected Tokens	Available Tokens
<OriginalFileName>	<Counter>
	<_>
	<OriginalFileName>
	<FileModificationDate>
	<MD5Hash>
	<UniqueID>
	<CustomTag>
	<ResultGUID>

Example Export File Name: MyFileName.doc

Custom Tag: ExportEmailCustomTag

OK Cancel

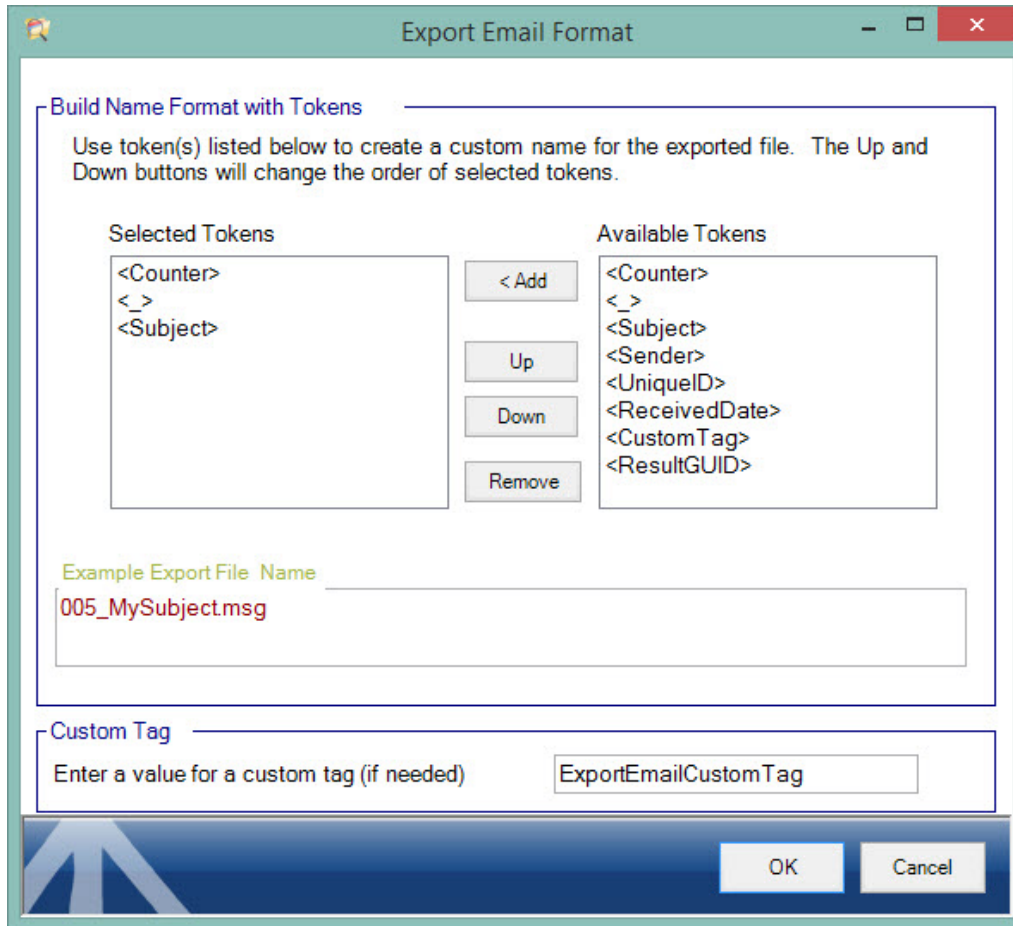
To create a custom export file name, use the **ADD** button to select a tokens from the *'Available Token'* list. When exporting files, the tokens selected will be replaced by values as listed below to create the custom name. Tokens can be used more than once.

Token	Description
<Counter>	The counter is an incrementing value. As each result is processed, the counter value will be incremented by one. See File Number Padding and Start Count for more counter options.
<_>	The underscore is useful for making file names more readable. It is a good idea to put an underscore between each token.
<OriginalFileName>	The name of the source file. This is the default value.
<FileModificationDate>	The date the file was last modified as stored in the database.
<MD5Hash>	The MD5 Hash of the file as recorded when the file was searched.
<UniqueID>	<p>A globally unique identifier created by <i>Discovery Attender</i>. It ensures a unique name for the file.</p> <p>Please note: This is not the result guid which uniquely identifies the item in <i>Discovery Attender</i>. Rather, it this ID uniquely identifies the exported item at the time of export. Technically you can have 100 exports of the same item to the same location all with a different, unique name.</p>
<CustomTag>	A user created tag that uses the ' <i>Custom Tag</i> ' value as a component for the export file name.

The '*Example Export File Name*' will show a sample of the exported file name based upon the selected tokens.

Export Email Name Format

This form allows you to create a custom export name for any email result exported using a [Export to Individual File](#) action. It is accessed from the [Settings](#) or when the [Export to File](#) action is chosen for email items.



To create a custom export message name, use the **ADD** button to select a tokens from the '**Available Token**' list. When exporting message or attachment items, the tokens selected will be replaced by values as listed below to create the custom name. Tokens can be used more than once. In the case of attachments, all tokens refer to the source message.

Please note: Some of the options available in this screen reflect choices in the [Email Specific](#) portion of the Export Actions in the Settings.

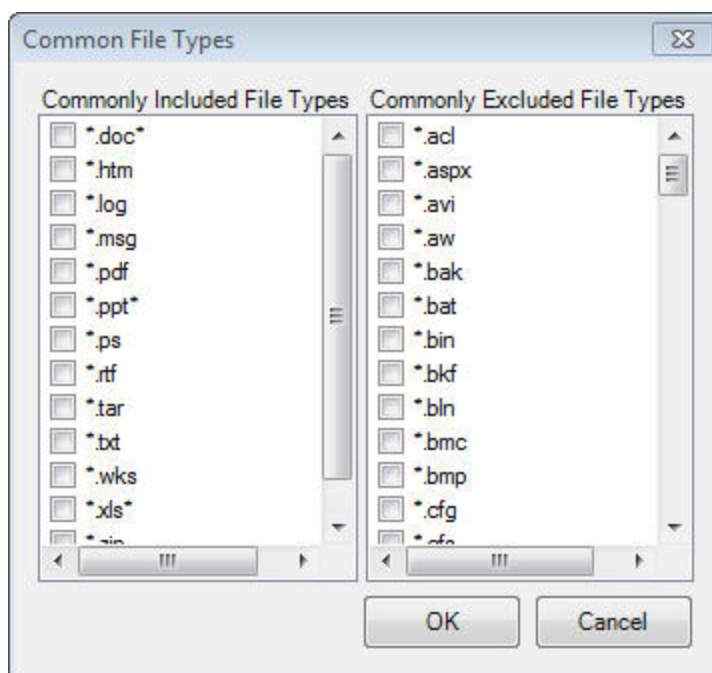
Token	Description
<Counter>	The counter is an incrementing value. As each result is processed, the counter value will be incremented by one. See File Number Padding and Start Count for more counter options.
<_>	The underscore is useful for making file names more readable. It is a good idea to put an underscore between each token.
<Subject>	The subject of the message normalized for a file name format.
<Sender>	Display name for the sender of the message.
<UniqueID>	A globally unique identifier created by <i>Discovery Attender</i> . It ensures a unique name for the export file. Please note: This is not the result guid which uniquely identifies the item in <i>Discovery</i>

	<i>Attender</i> . Rather, it this ID uniquely identifies the exported item at the time of export. Technically you can have 100 exports of the same item to the same location all with a different, unique name.
<ReceivedDate>	Date the message was received. The date will be rendered in yyyymmdd format.
<CustomTag>	A user created tag that uses the ' <i>Custom Tag</i> ' value as a component for the export file name.

The '*Example Export File Name*' will show a sample of the exported file name based upon the selected tokens.

Common File Types

This dialog box is accessed from the [File Names or Types](#) search wizard page.



Description

This box shows a list of common files for use in the [File Names and Types](#) search wizard page. These lists are populated from the [Common Files](#) node in the *Tools | Settings* screen accessed from the [Main Console](#). The selected file types will be added to the text box on the wizard page. It is helpful to use these common lists to maintain consistency between searches and to [expedite](#) the search processing of file shares.

The lists of common files shown in this screen are split into an *include* and an *exclude* list. Use the context menu (Right-click) to check or uncheck the entire list, or check just the appropriate items. Click **OK** to populate the File Name list in the Search Wizard.

Please note: Clicking **OK** will populate the file name lists, but will not change the drop down box setting on the [File Names](#) search wizard page. Don't forget to verify the drop down box on the wizard is including or excluding as you intend.

Context Menu

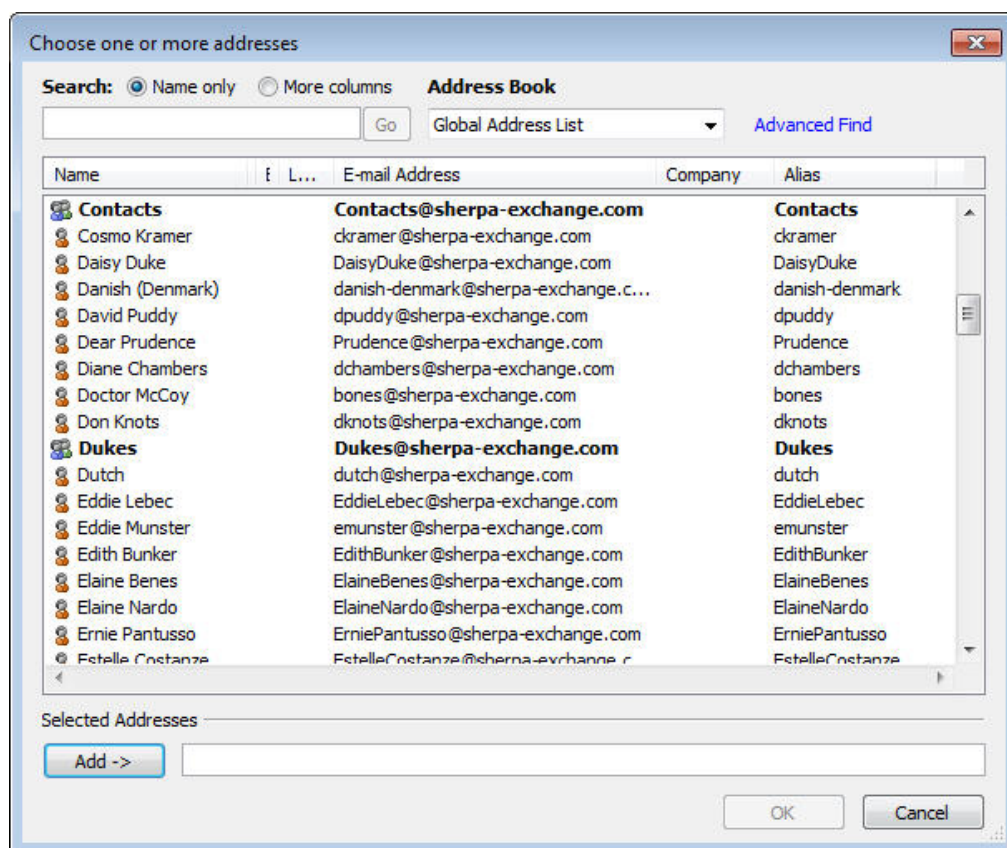
Select All	Selects all the extensions in the list
Check All	Checks all the file extensions in the list
Uncheck All	Un-checks all the file extensions in the list.

See Also

- [File Names and Types](#)
- [Searching Large File Shares](#)
- [Settings](#)

Browse the Global Address List (GAL)


Using this dialog box, a user can look up mailboxes, addresses and distribution lists from the Global Address List (GAL). If there are no entries on this list, the account used may not have access to the GAL associated with it.



To add items to the **Selected Mailbox** list, highlight an item and click the **ADD** button, or double-click an item from the list. Once the **Selected Mailbox** list is populated, click **OK** to return the list of mailboxes.

Please note:

- This dialog will reflect the local version of the MAPI drivers (installed with Outlook). The examples below are based on the Outlook 2007 version of MAPI. Newer versions of Outlook / Exchange will look differently.
- The GAL accessed shown with is the same one used by the default profile on the machine where *Discovery Attender* is installed. If you make changes to the properties, add addresses to the contact list, or insert new entries, you will be changing the actual values in the GAL. Use these features with caution!

	Description
Search	The list will focus on the entered text
Address Book	Source for the list of addresses. Defaults to the GAL, if available.
Selected Addresses	List of mailboxes which will be returned when the OK button is clicked.
Button	Description
	Copies selections from the mailbox list to the list of Selected Mailboxes
Advanced Find	Opens the <i>ADVANCED FIND FORM</i>

Find ✕

General

Display name:

First name: Last name:

Title: Alias:

Company: Department:

Office:

City:

To use effectively, simply enter the detail for the address you are seeking into the appropriate field then click **OK**. To leave the form, click **CANCEL**.

Context Menu

Properties	Shows the Properties for the selected mailbox or Distribution List as saved in the GAL.
Add to Contacts	Adds the items to the associated contact lists.
New Entry	Adds a new entry to the GAL.

Properties Dialog Box

The screenshot shows a dialog box titled "Wolfgang Mozart" with a close button (X) in the top right corner. The dialog has five tabs: "General", "Organization", "Phone/Notes", "Member Of", and "E-mail Addresses". The "General" tab is selected. The "Name" section contains fields for "First:" (Wolfgang), "Initials:" (empty), "Last:" (Mozart), "Display:" (Wolfgang Mozart), and "Alias:" (wmozart). The "Address:" field is empty. Below it are fields for "City:", "State:", "Zip code:", and "Country/Region:". To the right of these are fields for "Title:", "Company:", "Department:", "Office:", "Assistant:", and "Phone:". At the bottom left is an "Add to Contacts" button. At the bottom right are "OK", "Cancel", and "Apply" buttons.

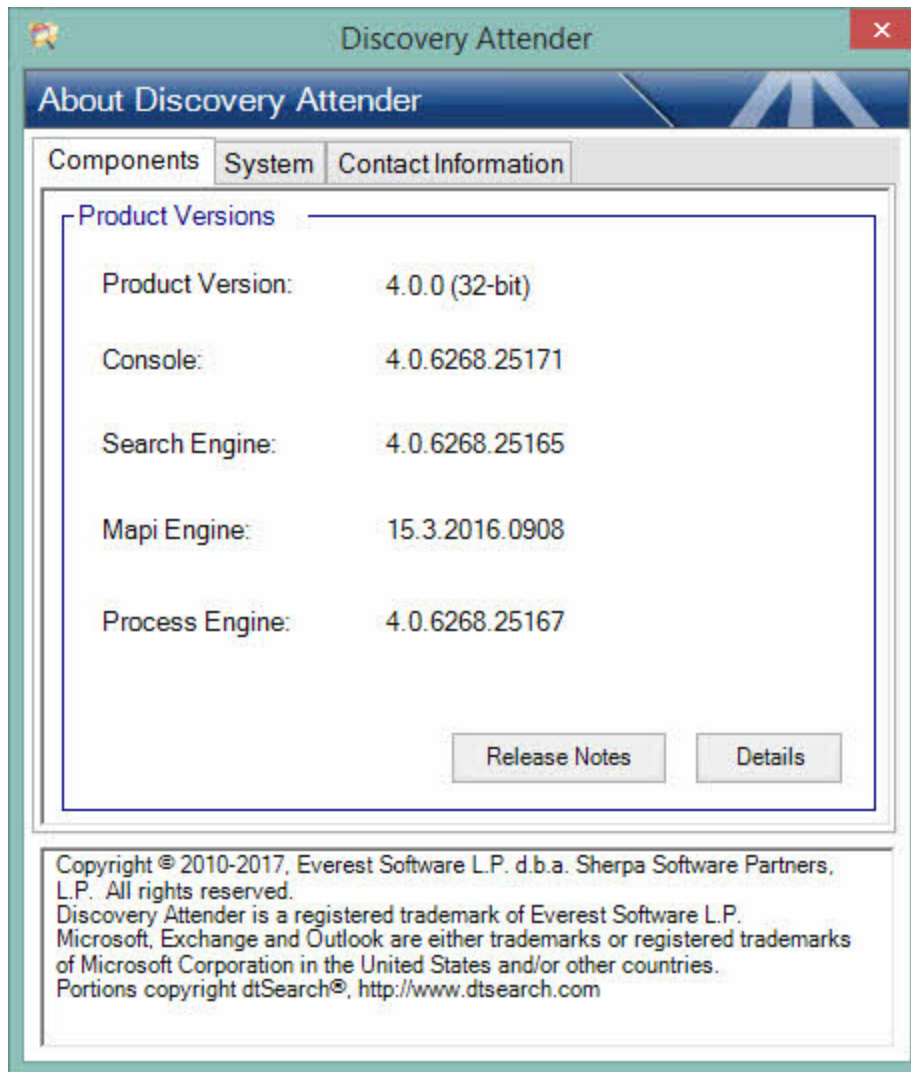
This form shows the properties for the selected item as stored in the GAL. Note, only one item can be selected for the properties to open correctly. Also note, any changes made here will affect the system GAL.

See Also

- [Select Exchange Mailboxes](#)
- [Configure Public Folder Mailboxes](#)
- [Choose Addresses](#)

About Discovery Attender

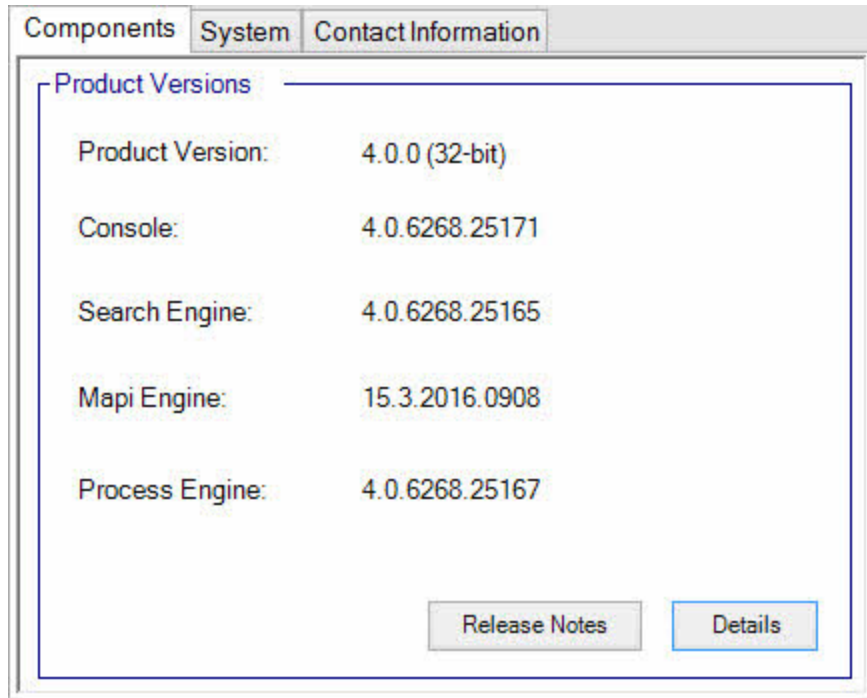
This view is reached from the [Main Console Help](#) menu. It contains information about the *Discovery Attender* installation files and details of the computer where the installation resides.



This screen contains three tabs:

- [Components](#)
- [System](#)
- [Contact Information](#)

Components Tab

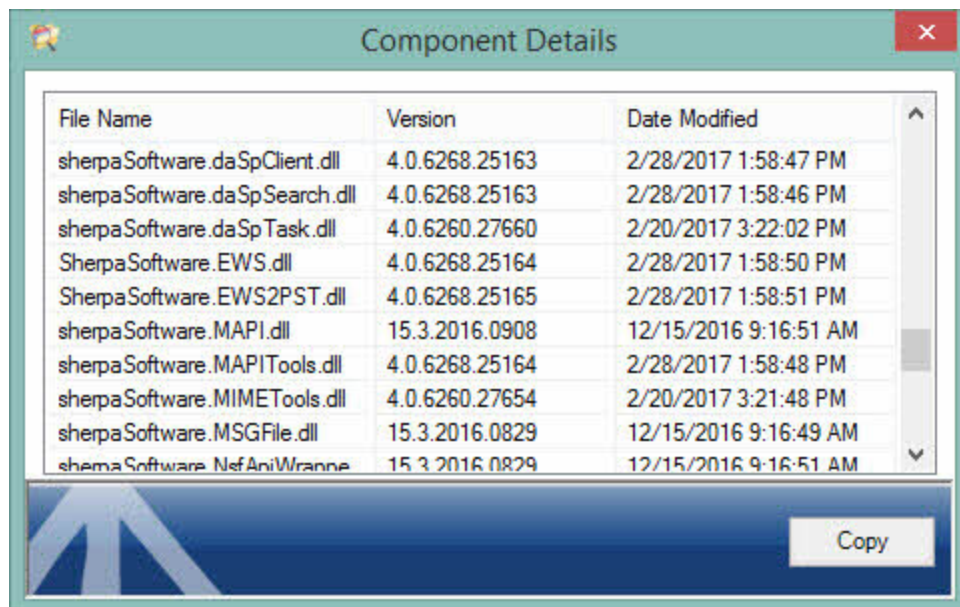


Product Versions

This section contains details about various Discovery Attender components. This information is useful for technical support if an issue arises.

The **RELEASE NOTES** button will open a set of notes detailing changes to made to Discovery Attender in the most current version. For a full set of release notes from the inception of the product, please see ReleaseNotes.pdf in the Help Folder under the installation directory.

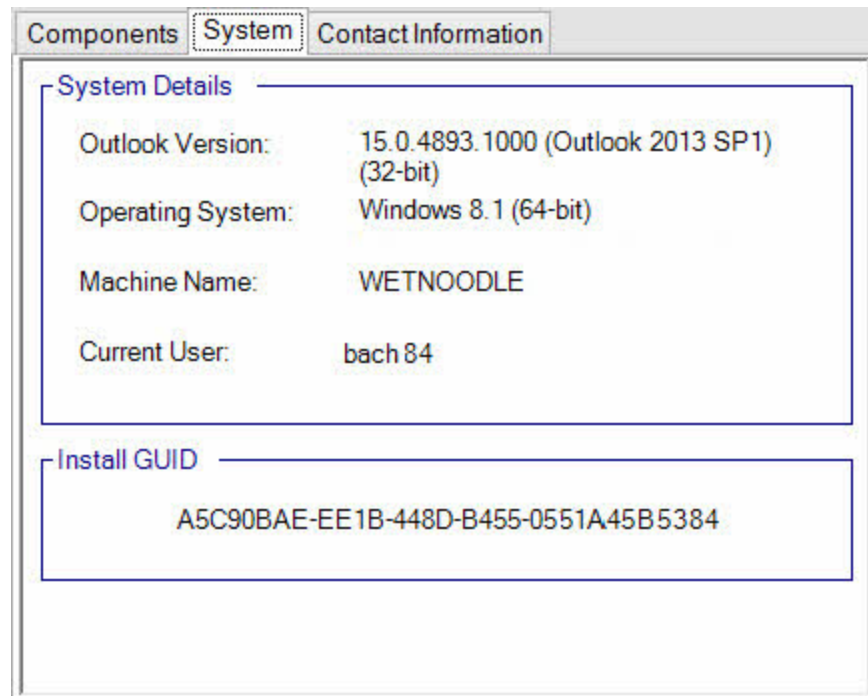
The **DETAILS** button will provide a complete listing of all components located in the installation directory. Please note, your listing may have different dates and versions than those in this image:



The **COPY** button will copy the component details list to memory, allowing you to paste it into another application (e.g. Notepad). To export this list of components to a CSV file, right click and choose 'Export to CSV'.

System Tab

This section displays details about the system components.



The **System Details** section contains useful information for troubleshooting.

The **Install GUID** is a unique identifier that differentiates this *Discovery Attender* installation from any other installation.

Contact Information Tab

This tab contains helpful information for contacting Sherpa Software. Please note: The **User ID** and **PIN** fields are optional. They are provided as an easy to reference area for your login credentials.

Components	System	Contact Information
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Technical Support

Active Maintenance Customers Only

Phone: (412) 206-0016

Web: [Request Support](#)

Email: tech-support@sherpasoftware.com

User ID:	PIN:	<input type="button" value="Change..."/>
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General Information

Phone: (800) 255-5155

Email: information@sherpasoftware.com

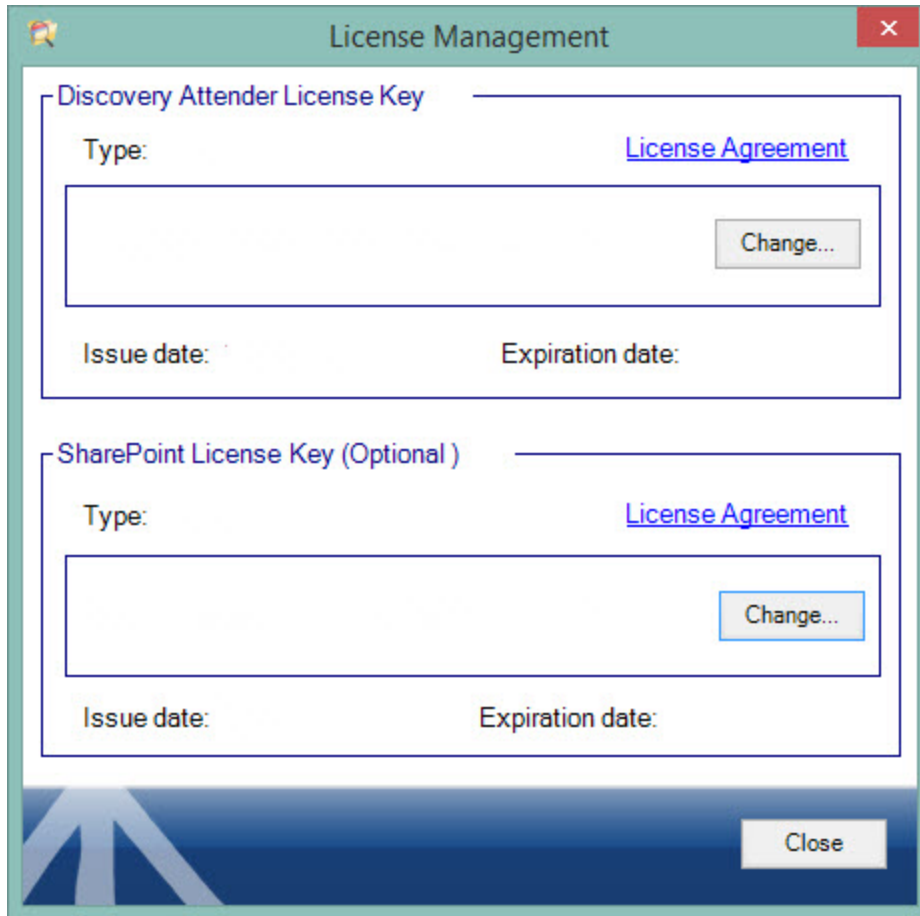
Web Page: www.sherpasoftware.com

See Also

- [Main Console](#)
- [Troubleshooting](#)

License Management

This screen allows users to view, enter and change license key details. It is reached from the [Main Console](#) using the *Help | License Management* menu option.



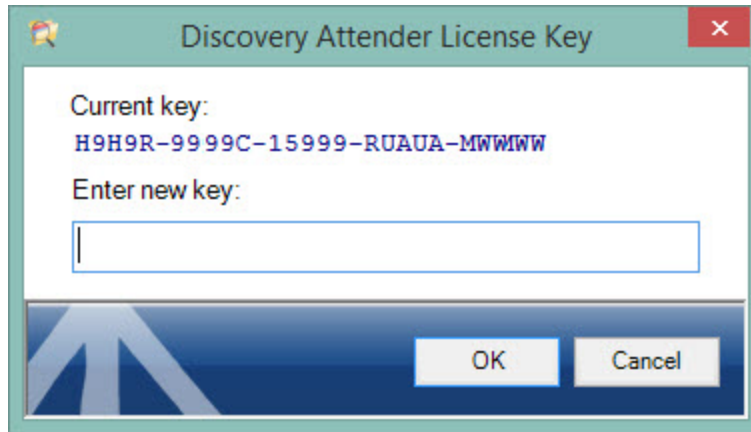
There are two sections to the License Management: *Discovery Attender License Key* and *SharePoint License Key*. A valid Discovery Attender license key is required for the full running of the product. The SharePoint license key is optional. It enables functionality to search files located on SharePoint data stores.

Evaluation or demo versions do not require a license key. Evaluation installations are limited by the number of locations they can search (5 mailboxes, 5 PST files, 5 NSF files, 1 file path, 1 SharePoint site), items that can be exported (250), and time allotted (15 days).

License agreements for *Discovery Attender* or *Discovery Attender for SharePoint* can be accessed via the appropriate **LICENSE AGREEMENT** links.

Entering a Discovery Attender License Key

License keys can be added at [startup](#), or changed from this screen. To add a license key, click on the **CHANGE** button to open the **Change License Key** dialog for the appropriate key:



Enter a new 25 character alpha-numeric license key then click **OK**. If the key is invalid, an error message will show.

Entering a SharePoint License Key (Optional)

An additional license key is needed if you plan to use the SharePoint search feature. If you do not require access to the [SharePoint](#) search feature, this step should be skipped.

To have full access to SharePoint functionality, click the **CHANGE** button in the *SharePoint License Key (optional)* section. This separate unique 25 character key will differ the standard license key.

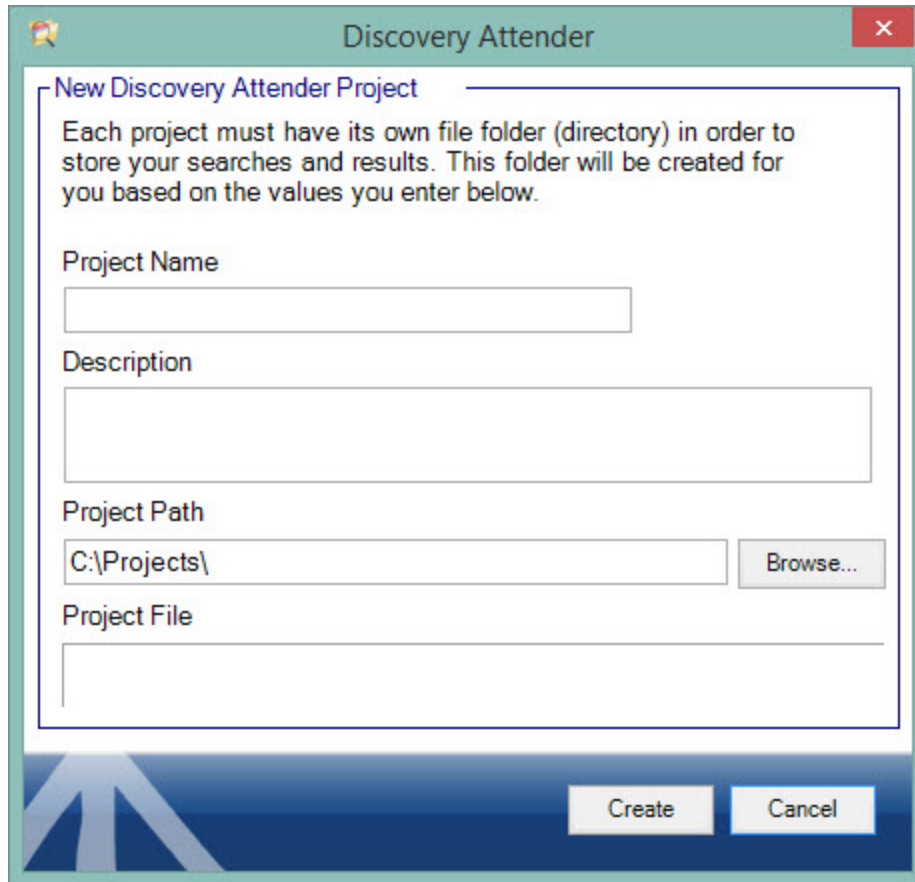
For any questions regarding license keys, please [contact](#) technical support.

See Also

- [Welcome Screen](#)
- [Main Console](#)

New Project Dialog Form

This form appears when **Create New Project** is selected from the [Welcome Screen](#), the **NEW** button is chosen from the [Open Project Screen](#), or *New Project* is selected from the *File* menu on the [Main Console](#). It should be used to create a new project which is used to group related *Discovery Attender* searches together.



Creating a new project performs several tasks. First, a new project folder is created underneath the location selected in **Project Path** . A project file with a prefix **.dapj** is created in the new project folder to help locate the project when browsing. Additionally all the project related information including searches, database, results, and logs will be housed under the project folder. Therefore it is essential to ensure the location you select for the project has sufficient space to store this data.

Note: Sherpa recommends storing projects local to the machine where *Discovery Attender* is running. Although Sherpa will support projects stored on a network share, searches run far more efficiently when the projects are stored locally.

	Description
Project Name	This is the name of the project as it will appear in your project list and also the name of the folder which holds all the project details.
Description	User entered details describing the project. This information is stored with the project and can be seen in the Open Project screen.
Project Path	User entered directory location for this project. Use the BROWSE button to select a path value, or type it in directly. The default location is the root drive, but you may want to store your projects in a directory that has more storage capacity, or in a more centralized location. Please make sure the length of the project path will not exceed 100 characters. Please note:

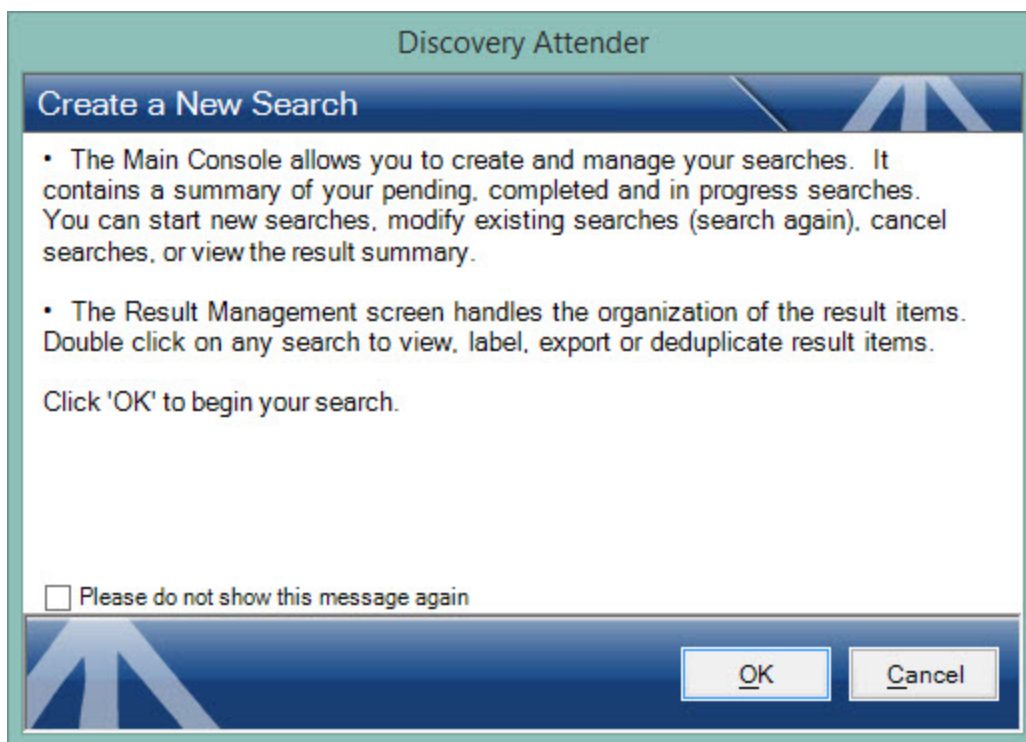
	<ul style="list-style-type: none"> • It is a good idea to store your project on the same machine where Discovery Attender is installed for most efficient processing. • Projects are self contained, so you can move them at a later time after your searching is complete. • Never run your project from a USB drive.
Project File	This is the complete path of the project file as stored.

Clicking the **CREATE** button will create the project file, project directory and the default directory structure for the project.

Click **CANCEL** if you do not want to create a project at this time. The [Main Console](#) will open, but you will not be able to start or manage any searches.

Create a New Search Form

Once a new project has been created, *Discovery Attender* may prompt you to create a new search. Clicking **OK** will start a new [Search Wizard](#), while clicking 'Cancel' will take you directly to the [Main Console](#).



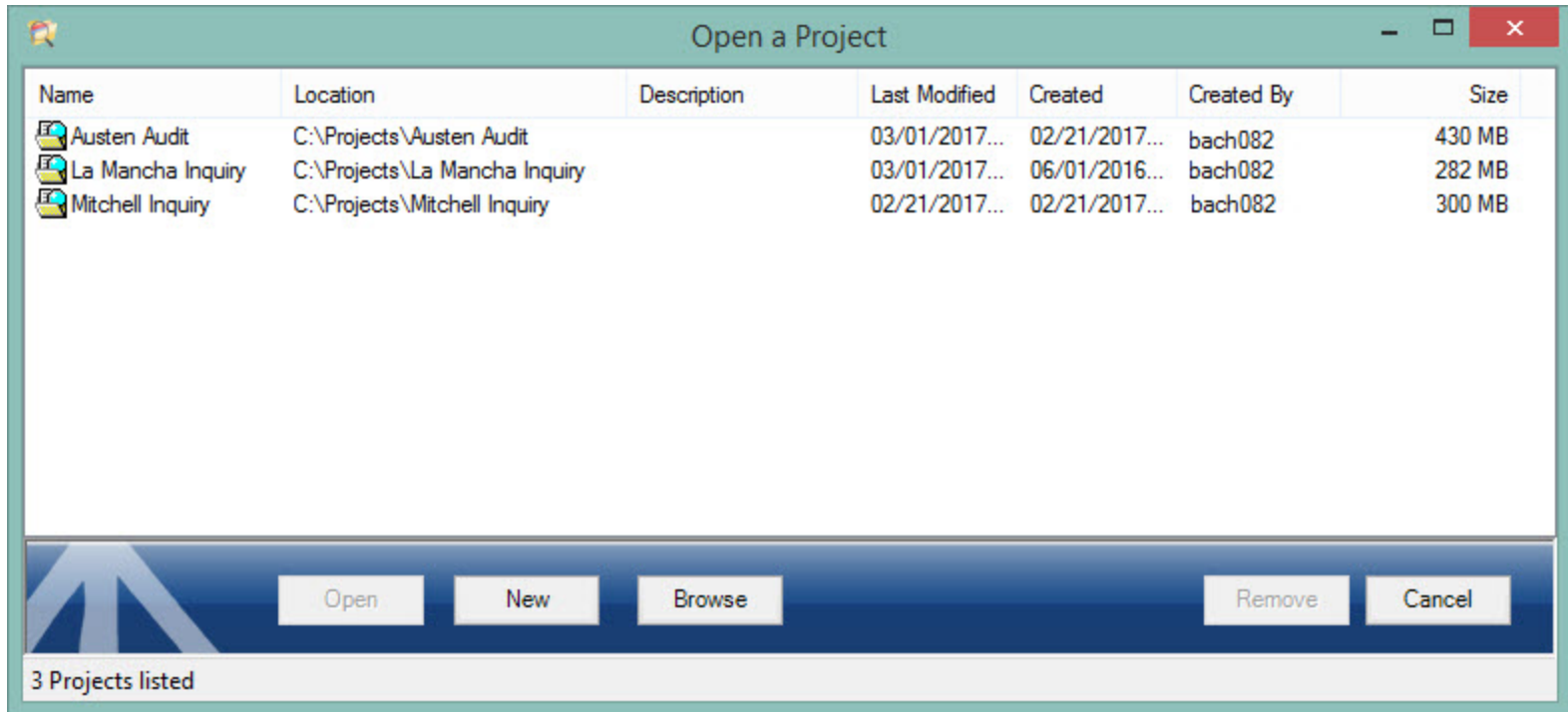
This is an optional screen. Check the 'Please do not show this message again' option to hide the screen in future.

See Also

- [Main Console](#)
- [Open Project Screen](#)
- [Welcome Screen](#)

Open Project Dialog

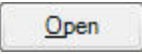

This screen is used to navigate or create projects. This *OPEN PROJECT DIALOG* will appear when **Open Existing Project** is selected from the [Welcome Screen](#) or, if the *WELCOME SCREEN* has been disabled, this will be the first screen shown on startup of *Discovery Attender*.



Description

This form provides access to all the recent projects created in Discovery Attender. In addition to opening projects, this form allows you to create new projects, browse for existing ones or remove them from the project list.

Buttons

	Open the selected project by loading it in the Main Console . Double-clicking on any item in the list of recent projects will also open the selected project
	Open the New Project Dialog where you can create a new, empty project.

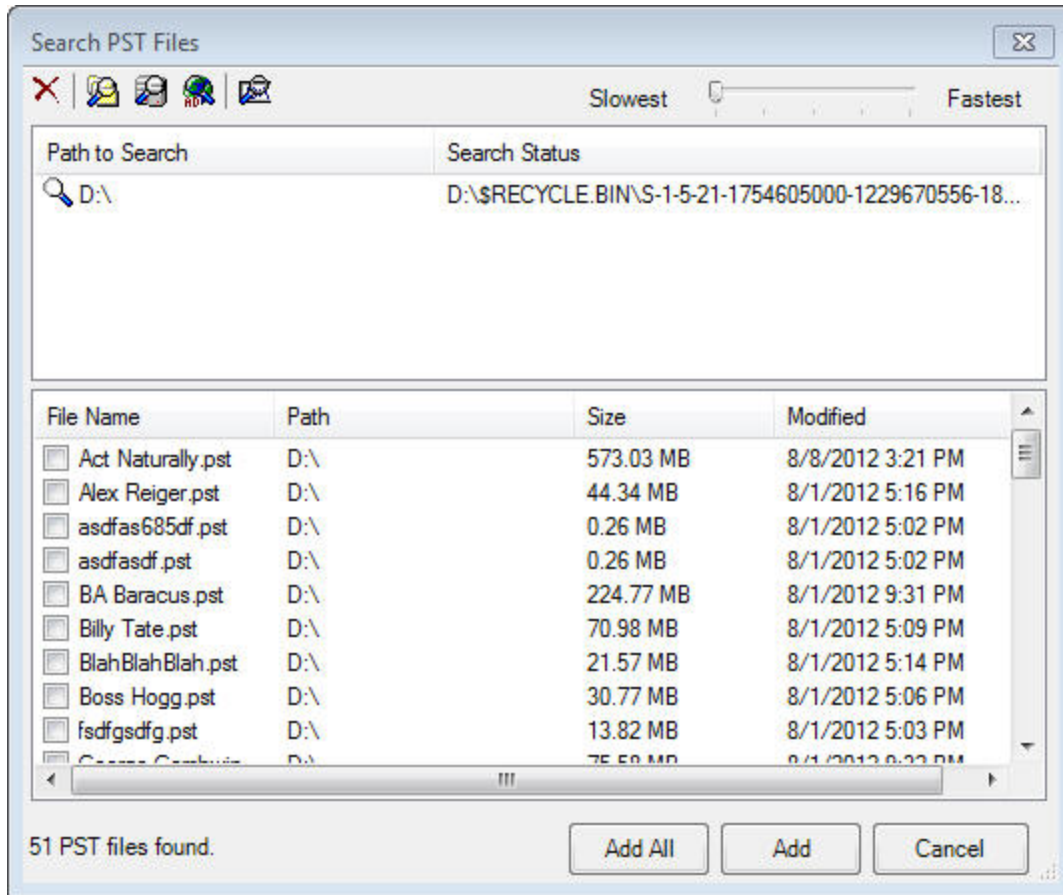
<input type="button" value="Browse"/>	<p>If the project you would like to open is not listed, you can use this button to locate the project file (*.dapj) and open it from a local or network drive</p>
<input type="button" value="Remove"/>	<p>Deletes the selected projects from the list. This same functionality is also accessible by right-clicking and selecting '<i>Remove from List</i>' from the context menu.</p> <p>Please note: Removing a project <i>will not</i> delete the project file or any of the project data. This functionality simply removes the details from the Recent Project list in this form and in the Main Console.</p>
<input type="button" value="Cancel"/>	<p>Closes this <i>OPEN PROJECT</i> dialog and take you directly to the Main Console. From there, you will be able to access the <i>Tools</i>, <i>Settings</i> and <i>Help</i>, but will not be able to create any searches as there is no open project.</p>

See Also

- [Main Console](#)
- [New Project](#)
- [Welcome Screen](#)

Search for Mail Files (PST or NSF)




This dialog box appears when the **SEARCH** button is clicked on the [Select PST Files](#) wizard screen, or in a slightly different form when the **SEARCH** button is clicked on the [Select NSF Files](#) wizard screen.

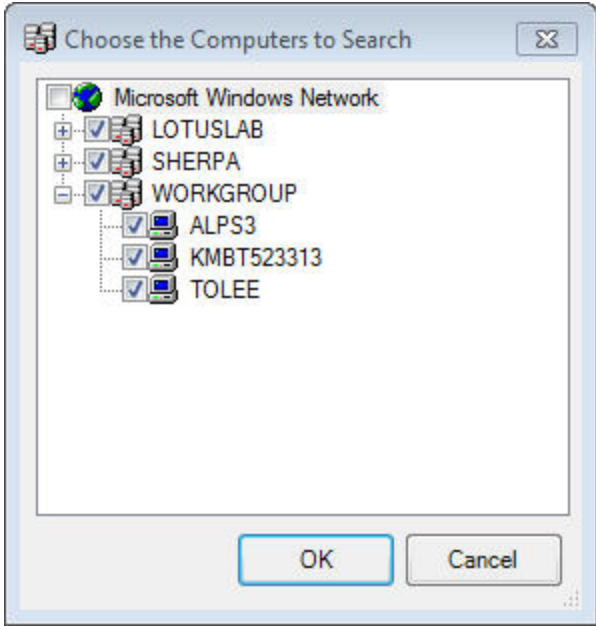


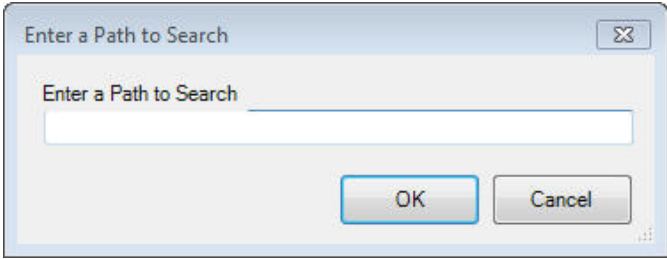



Description

This dialog allows the user to create and edit a list of all the mail files of the appropriate type located on specified hard drives, external machine or network locations. The selected mail files can then be added to the appropriate list in the wizard.

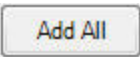

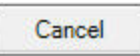
Users can select multiple directories to search for mail files using the toolbar buttons.

	<p>This option will remove selected path and stop the any search that may be running for the highlighted path.</p>
	<p>Use a <i>BROWSE</i> dialog to select a Folder Path where mail files can be located. This option is useful for directories that are easily accessed such as local or mapped drives.</p>
	<p>Select a computer where mail files can be found. This can be useful for selecting mail files on remote desktops.</p>

	 <p>Please note: You will need connectivity, access and permissions to view and collect data from these drives.</p>
	Use Active Directory to find computers to search for mail files.
	<p>Enter a file path to locate mail files. This option is helpful to locate mail files in UNC file paths such as network shares.</p> 
	This slide bar controls the speed of the search tasks.

Please note: When searching a network share, it is best to enter a UNC path in '\\server\share' format rather than a named share such as 'g:\share'.

Buttons

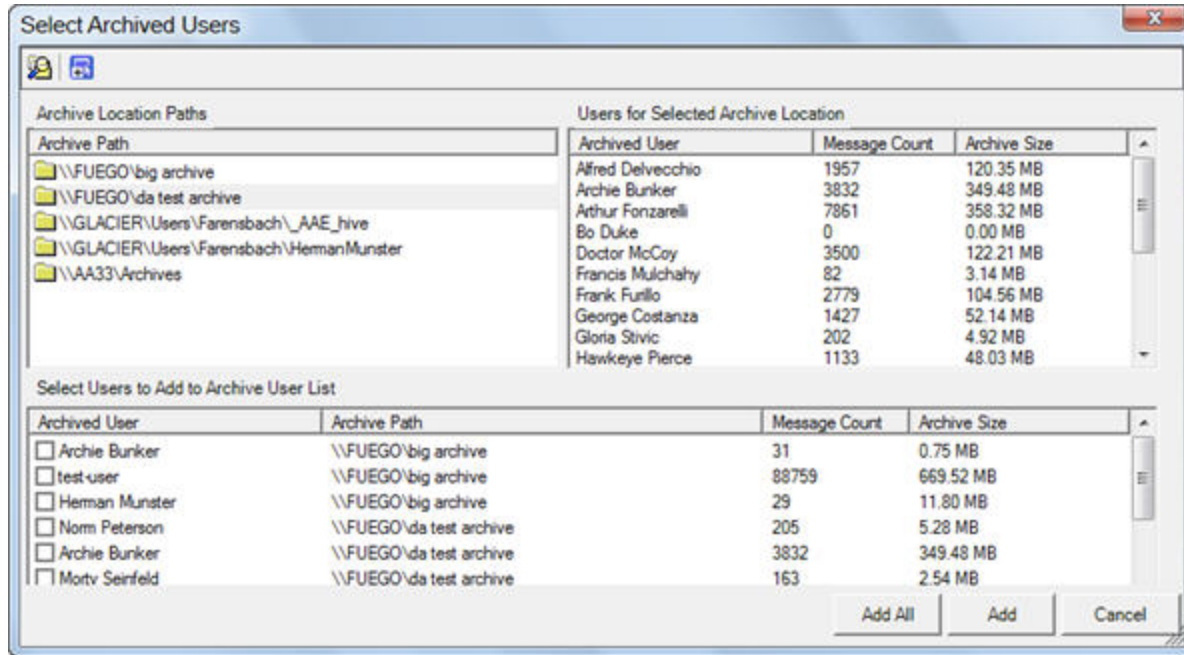
	Adds all the listed entries to the appropriate wizard page, regardless of check box.
	Adds only the checked entries to the appropriate wizard page
	Cancel the dialog and doesn't add any users to the wizard page.

See Also

- [Select PST Files](#)
- [Select NSF Files](#)

Select Archive Users



This screen is used in conjunction with *Archive Attender* archives. It provides an efficient method for selecting archive users distributed among multiple archive locations. It is accessed by clicking the **LOAD** button in the [Select Archive Users](#) wizard page.



To correctly use this screen, you must first create a list of archived locations by adding entries the **Archive Attender for Exchange Archive Paths** section in [Tools | Settings | Archive Attender](#).

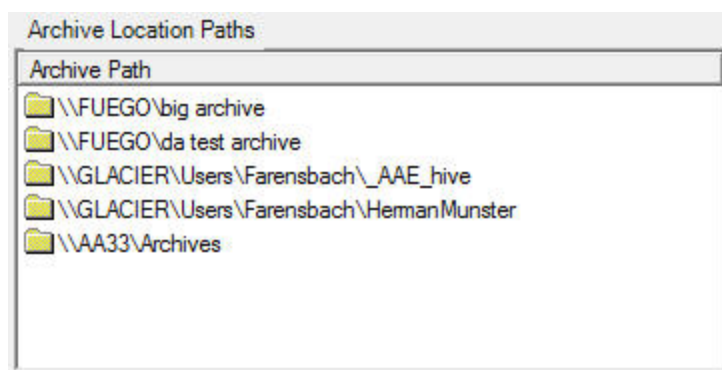
Please note: Not all archives store information on a user level. This form can also be employed to select archives stored by date or other grouping.

Toolbar

	Select a CSV file containing a list of archive locations to populate the Archive Location Paths section of this form. Although you can create your own CSV file, you may find it easier to create and edit the default list in the Archive Attender for Exchange Archive Paths' section in Tools Settings Archive Attender .
	Populate the Archive User List with every user found in each Archive Location Path listed in this form. It provides a quick and easy way to enter all your archive users into the list.

Sections

Archive Location Paths



This section lists the archive locations. Select an entry in this list to view the associated users in the **Users for Selected Archive Location** section of the form. Right-Clicking and selecting *Add All* will add all users in this archive location to the user list.

Users for Selected Archive Location

Archived User	Message Count	Archive Size
Norm Peterson	205	5.28 MB
Archie Bunker	3832	349.48 MB
Morty Seinfeld	163	2.54 MB
Francis Mulchahy	82	3.14 MB
Arthur Fonzarelli	7861	358.32 MB
Alfred Delvecchio	1957	120.35 MB
George Costanza	1427	52.14 MB
Hawkeye Pierce	1133	48.03 MB
Doctor McCoy	3500	122.21 MB
Sam Flagg	16406	885.22 MB

This section lists all the users from the archive location selected in **Archive Location Paths**. You can add users individually or as a group to the user list by using the context (Right-Click) menu.

Selected Users to Add to Archive User List

Archived User	Archive Path	Message Count	Archive Size
<input type="checkbox"/> Archie Bunker	\\FUEGO\big archive	31	0.75 MB
<input type="checkbox"/> test-user	\\FUEGO\big archive	88759	669.52 MB
<input checked="" type="checkbox"/> Herman Munster	\\FUEGO\big archive	29	11.80 MB
<input type="checkbox"/> Norm Peterson	\\FUEGO\da test archive	205	5.28 MB
<input type="checkbox"/> Archie Bunker	\\FUEGO\da test archive	3832	349.48 MB
<input checked="" type="checkbox"/> Morty Seinfeld	\\FUEGO\da test archive	163	2.54 MB
<input type="checkbox"/> Francis Mulchahey	\\FUEGO\da test archive	82	3.14 MB
<input checked="" type="checkbox"/> Arthur Fonzarelli	\\FUEGO\da test archive	7861	358.32 MB
<input type="checkbox"/> Alfred Delvecchio	\\FUEGO\da test archive	1957	120.35 MB
<input type="checkbox"/> George Costanza	\\FUEGO\da test archive	1437	52.14 MB

This list shows the archive user entries already selected. You can use the context menu to select, check or uncheck the listed items. Archive Users must be present in this list to be copied to the wizard page.

Buttons

<input type="button" value="Add All"/>	Adds all the listed entries to the Select Archive Users page, regardless of check box.
<input type="button" value="Add"/>	Adds only the checked entries to the Select Archive Users page.
<input type="button" value="Cancel"/>	Cancel the dialog and doesn't add any users to the Select Archive Users wizard page.

Columns

Archive Path	File path which contains the archive location
Archived User	Name of the user for these archive
Message Count	Total number of messages in the selected archive
Archive Size	Total size of the selected archive

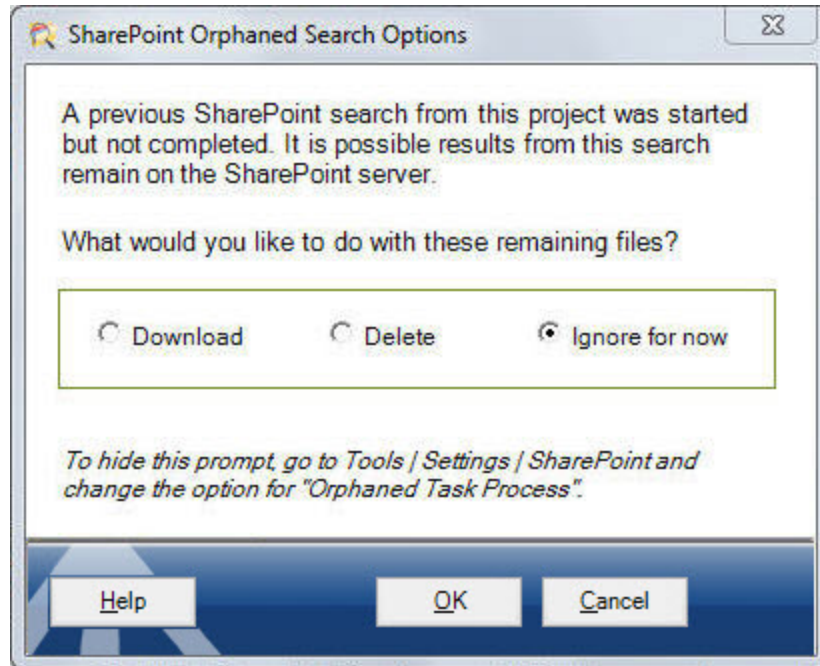
Note: the message count and archive size are values generated by the [Archive Attender](#) process.

See Also

- [Archive Attender Settings](#)
- [Select Archive Attender Archives](#)

SharePoint Orphaned Search Options

This dialog box opens if orphaned tasks were left on the SharePoint servers from previous searches in the selected project.



This dialog will appear by default, but the functionality can be automatically handled, or this dialog disabled via the **Orphaned Task Process** option in *Tools | Settings | [SharePoint](#)*.

Options

Download	The orphaned results will be downloaded to the task directory. This version does not yet support processing these orphaned items.
Delete	Deletes the local and server based task files for the orphaned tasks
Ignore for now	Ignores all orphaned tasks.

Click the **OK** button to save your changes and continue

See Also

- [Main Console](#)
- [Searching SharePoint](#)
- [Settings](#)

Advanced Result Filter

Discovery Attender has the ability to search within a set of results using date, address or keyword filters. These advanced filters can be accessed, modified and viewed from the [Advanced Filters](#) node in Result Management. To create a new filter, select **New** or **Copy** and the [Advanced Result Filter Wizard](#) will open.

- Although the *ADVANCED RESULT FILTER* may seem like a stripped down version of the search wizard, the syntax and search methodology is different. Dates, Addresses and other Properties are resolved from data stored in the databases, not the original document in the source data store.
- General keyword options are only available if results were indexed, although internally stored properties can be searched using the **Properties** filter.

Follow the wizard screens by clicking **NEXT** to create and create a new set of filtered results.

Welcome - Start Your Search Within Results

This section is used to describe the advanced result filter and provide a summary of the results.

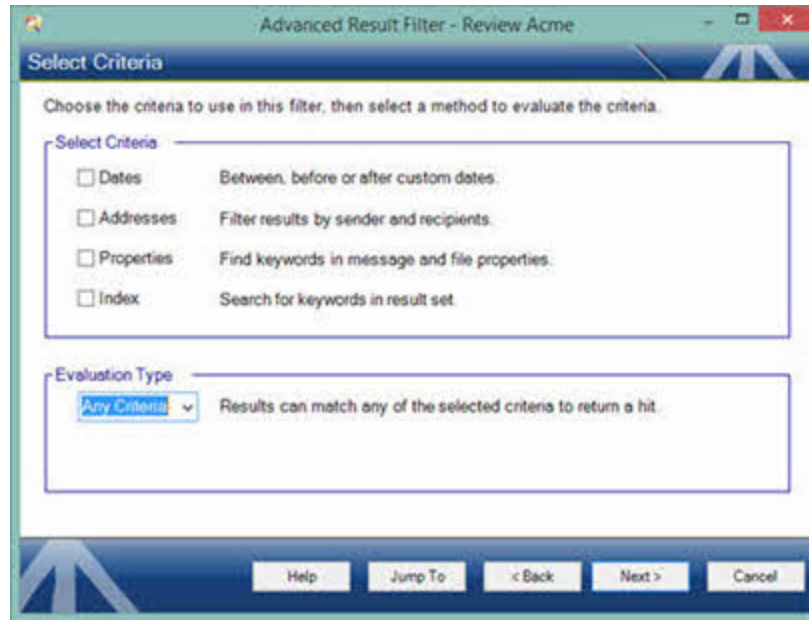
Filter Description	Revision
New Filter	1

The result set consists of the following:	
Messages:	537
Attachments:	531
Files:	0
Directories:	0
Total:	1068

Filter Description	Title for the filter. This name will appear in all lists, so it is a good idea to create a name that will uniquely identify and describe this filter.
Revision	Incremented number to distinguish filters with the same title
Summary	This area shows you the number of hits that are in your search for your reference.

Select Criteria

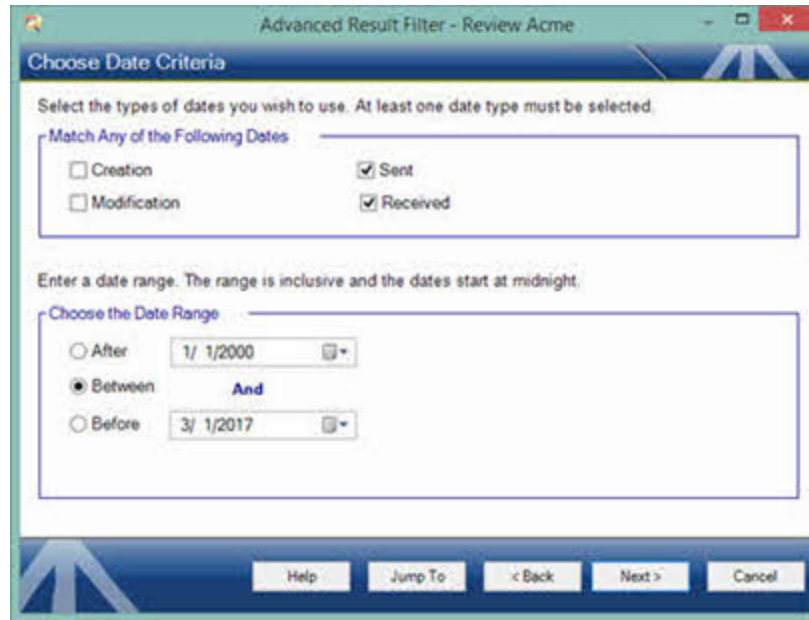
This screen allows you to select the criteria that you will use in your filter.



Dates	Uses date criteria to filter result set.
Addresses	Uses message address to find results. Please Note: this criteria can only be used if address details were collected for the search. These details are collected by default. See Settings for more detail.
Properties	Search database properties for keywords.
Index	Uses the index to locate keywords for the filter. Please note: This criteria will only be enabled if the results were indexed as part of the search.
Evaluation Type	The method to evaluate the criteria. <ul style="list-style-type: none"> • All Criteria means that all the selected criteria will have to match to return a hit. • Any Criteria allows any of the criteria options to match to add it to the filtered list.

Choose Date Criteria

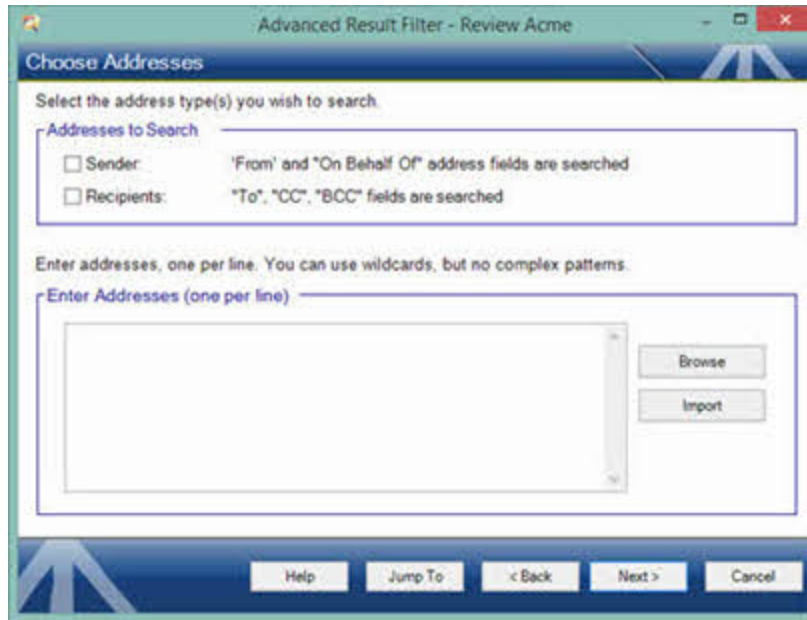
This criteria can be used for any type of result, however, the **Sent** and **Received** dates can only be used if **Messages** or **Attachments** were searched. The filter will use properties stored in the main database for its information source.

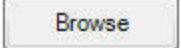
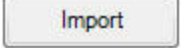


Step 1	<p>Select the types of dates you wish to use under the "<i>Match Any of the Following Dates</i>" section. At least one date type must be selected, or else the filter will error when it is applied.</p> <p>Please Note: Sent and Received Dates apply to email results only.</p>
Step 2	<p>Set the range in the "<i>Choose the Date Range</i>" section. The range is inclusive and the dates start at midnight.</p>
Step 3	<p>Click on 'NEXT' to advance the wizard</p>

Choose Addresses

Use Address criteria to filter for addresses in messages and attachments.

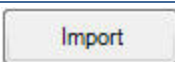


Step 1	Select the Addresses type you wish to search in the ' <i>Addresses to Search</i> ' section. <ul style="list-style-type: none"> • Sender will search the 'From' and "On Behalf Of" address fields, • Recipients will find items in the "To", "CC", "BCC" fields.
Step 2	Enter your address criteria, one per line. <ul style="list-style-type: none"> • You can use wildcards, but not complex patterns (Near, Like, RegEx, Boolean). • It is always a good idea to use the '*' wildcard when searching addresses.
Step 3	Click on ' Next ' to advance the wizard
	Browses the Global Address List for addresses.
	Allows user to select a file from which to import a list of addresses into the text box.

- The address filter uses properties stored in the detail database as the source of its information. To work properly, Address Details must have been saved as part of the search. This option is on by default and is available in the [Settings](#) screen.
- This criteria can only be used for message and attachment results.
- The **Display Name** and **Address** of each message address property are compared against the criteria entered in this form to find a match. As of this writing the SMTP fields are not.

Indexed Keyword Criteria

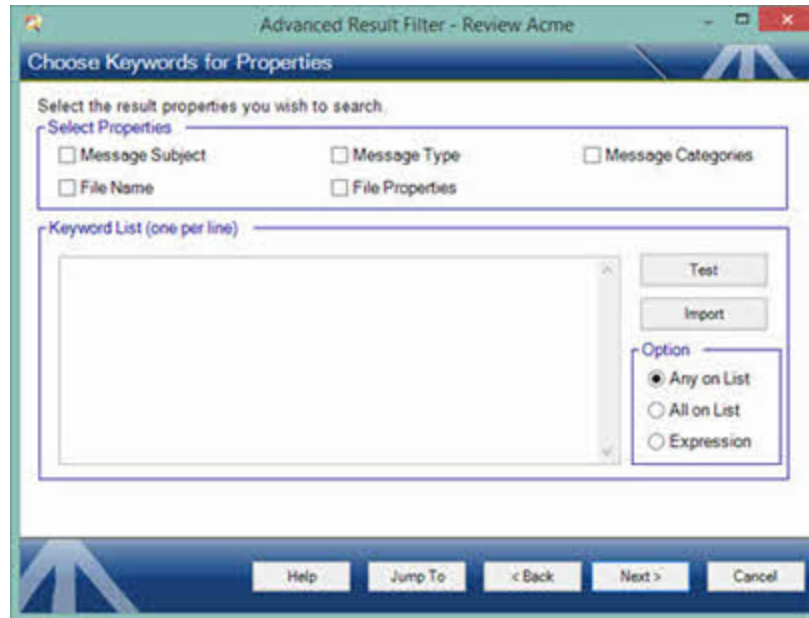
Advanced Result Filters can use **Keyword** criteria only if the results were [indexed](#) as part of the search. This result index is a collection of keywords from each result arranged for quick and efficient searching. Please note: Searching an index requires different syntax than the Search Wizard. See [Filter Expression Syntax](#) for detail.

<p>Step 1</p>	<p>Choose an Option to select the evaluation method for the keyword filter.</p> <ul style="list-style-type: none"> • <u>Any on List</u> evaluates the criteria as a list of words. If a match is found against any keyword on the list, it will be returned as part of the filtered set. • <u>All on List</u> also evaluates a list of words. In order to be returned as part of the filter set, each and every keyword in this list must match. This is equivalent to using the AND conjunction to join the keywords in the list. • <u>Expression</u> expects an advanced filter expression based on special syntax. See below for syntax details. This is the default for new filters.
<p>Step 2</p>	<p>Enter the keywords you wish to search based on the option selected. <u>Any on List</u> and <u>All on List</u> expect a list of words, one per line.</p> <p>If using an advanced filter <u>Expression</u> option, enter the entire expression without line breaks . The text will wrap around the control.</p>
<p>Step 3</p>	<p>Click on 'NEXT' to advance the wizard.</p>
	<p>Allows user to select a file from which to import a set of keyword criteria into the text box.</p>

To find your index location, right-click on the search in the [Main Console](#). Navigate to the [Debug Menu](#), and select *Search Directory* to open the folders for the selected search. If a search has been indexed, there will be a folder called '**Index**'.

Properties

Search various database properties for keywords.

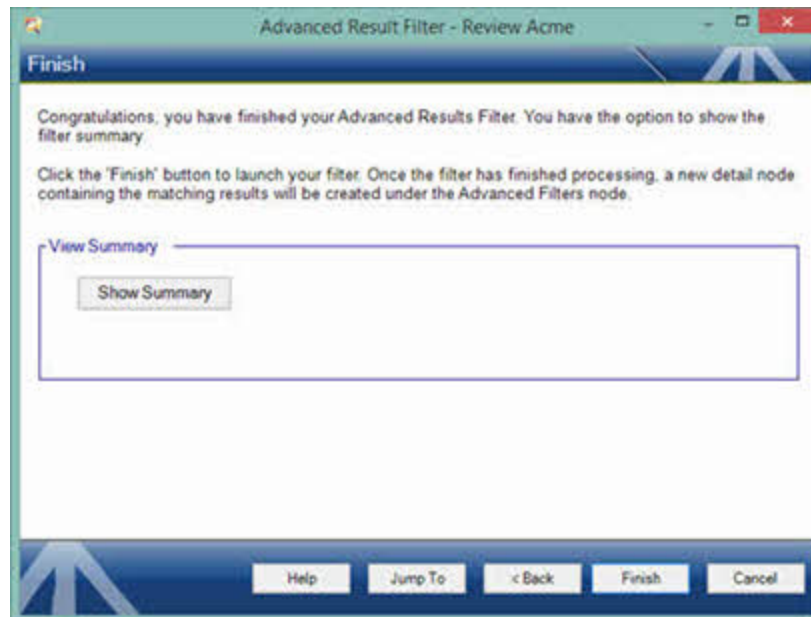


Step 1	<p>Choose the properties you wish to search.</p> <p>Message Subject: This is the subject of a message that is stored for all message and attachment results.</p> <p>File Name: This is the name of the file for all attachment and file results.</p> <p>Message Type: The message class which is stored for all message and attachment results.</p> <p>File Properties: Items must match one of the properties collected for file or attachment results. These properties vary by file type and accessibility. To collect these properties successfully, the Collect Document Properties option must have been enabled for this search.</p>
Step 2	<p>Enter the text into the Keyword List. All Keyword options can be used here, but this functionality is comparing against the database fields for each of these properties.</p> <p>Please note: Be sure to use the tester to validate your criteria.</p>
Step 3	<p>Select the evaluation options:</p> <p>Any on the list: Parses the text box as a list of words or phrases, one per line. If any of these words or phrases can match, then the result is included in the filter.</p> <p>All on the list: Parses the text box as a list of words or phrases, one per line. All of these words or phrases <i>must</i> match to include the result in the filter.</p> <p>Expression: The entire text box is used as the search expression and must be syntactically correct to continue. Only if the properties match the expression will the item be a hit.</p>

	Please note: For the All on list and the Expression options - at least one individual field must match the entire listed criteria. The fields are not compared as an aggregate.
Step 4	Click on ' NEXT ' to advance the wizard.
<input type="button" value="Test"/>	Tests the text box and options using the Keyword Tester .
<input type="button" value="Import"/>	Imports the keyword list from a file and inserts it into the text box.

Finish

From this screen you will complete the filter by clicking '**FINISH**'.



Use the '**SHOW SUMMARY**' button to view a summary of the filter you have created. If you need to change any criteria, simply click **JUMP TO** and choose the screen.

Once you have set up the filter to your satisfaction, click the '**FINISH**' button. The wizard will close and a new node will be created under '**ADVANCED FILTERS**' with a listing of your results. This may take a few minutes if you have a large result set.

If you have there are no matches to this filter, a message will be displayed in the status bar.

Filter Expression Syntax

Index searching uses different syntax from a search created with the Search Wizard. Filter Expressions give you the options to use [Boolean](#) operators or [Proximity](#) searches.

In filter expression syntax, Boolean operators (AND, OR, NOT) are used to distinguish a relationship between the keywords. Please see the Boolean operator portion of Search Term Clarification for more detail.

Proximity searches are available in your filter expression, however, the syntax is different from the main search. The format for the filter expression is **WordA w/# WordB** where **#** represents the number words between your first and last word.

Another helpful option is **xfirstword** and **xlastword** which refer to a number of words between your keyword and the beginning or end of a document. The format is **Keyword w/# xfirstword**.

If you are using multiple proximity operators in an search expression, be sure to put them in parentheses, e.g. [\(sherpa w/2 software\)](#) OR [\(discovery w/2 Attender\)](#).

Please note:

- Indexes do not include so called noise words such as 'the', 'a', 'or', 'and', or 'if'.
- Punctuation is not included in this index. Do not include punctuation such as periods, hyphens, commas, quotes etc. as part of your keyword criteria.
- Messages and attachments are indexed together. All source messages for attachments hits will be included in the index. Likewise, all attachments will be included for any message hit. Furthermore, if both an attachment and a message had hits in the main search, the message result will be returned as a filter hit, even if the filter keyword matched in the attachment.
- The index is created using the dtSearch indexing engine. If you wish, you can use dtSearch syntax as part of your search expression, or even use dtSearch Desktop to search your index with more advanced functionality.
- To find your index location, right-click on the search in the Main Console. Navigate to the Debug Menu, and select Search Directory to open the folders for the selected search. If a search has been indexed, there will be a folder called '**Index**'.

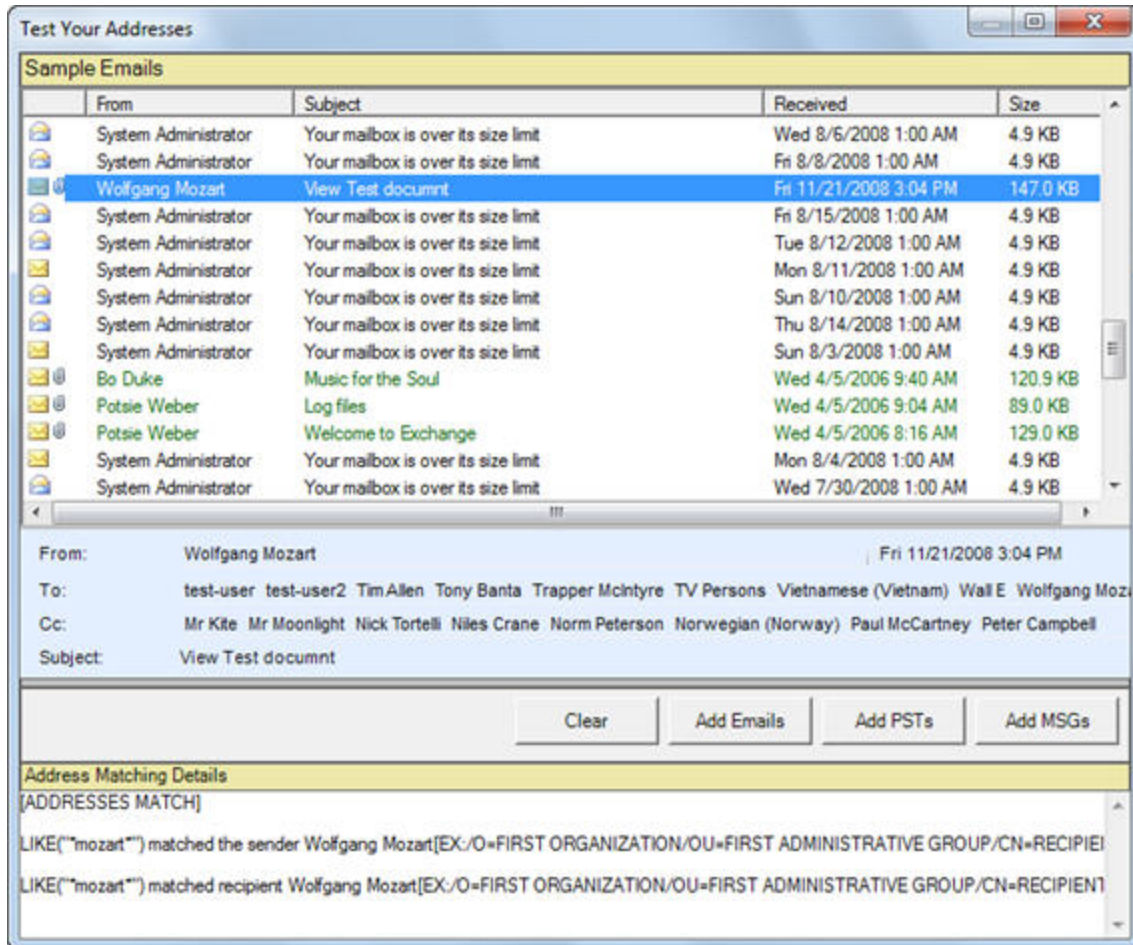
See Also

- [Result Management](#)
- [Filter Summary](#)
- [Filter Detail](#)

Address Tester

The Address Tester is designed to help the user validate address criteria against actual message data. It is accessed from the [Choose Addresses](#) wizard page. The sample data to test these addresses can come from the attached Outlook Profiles (**ADD EMAILS**), loose PST Files (**ADD PSTs**) or loose .MSG Files (**ADD MSGs**).

Note: Please use small test data sets to avoid delays.



To use the tester, follow these steps:

Step 1	Add your Address criteria to the Choose Addresses wizard page, then click on the TEST button.
Step 2	Click on the provided buttons to select emails to add to the Sample Emails List Note: It is best to use small PSTs to test. Selecting a large PST will freeze the program while it works on opening the set of folders.
Step 3	Review messages listed in the Sample Emails list. Entries with green font correspond to matches, those in plain black are non-matches.
Step 4	Select an item to view. The address expansion window will reflect address format within a message. The Address Match Detail will show how the message was evaluated, giving details if there was a match.
Step 5	Make changes to the address criteria, if needed, in the Choose Addresses wizard page, then click TEST again.

Sections:

Sample Email List

This portion of the window shows the list of messages chosen using the available buttons. The list is

cumulative: more emails can be added to the list without replacing the current occupants. Selecting an item in this list will populate the [Address Expansion](#) and [Address Matching Detail](#) Windows

Columns:

From	Sender of the messages
Subject	Subject of the messages
Received	Date the messages were received
Size	Size of the message

Address Expansion Window

This section shows the address details - From (Sender), To, CC, BCC - for the message highlighted (selected) in the [Sample Emails](#) list.

From:	Wolfgang Mozart	Fri 11/21/2008 3:04 PM
To:	test-user test-user2 TimAllen Tony Banta Trapper McIntyre TV Persons Vietnamese (Vietnam) Wall E Wolfgang Moz	
Cc:	Mr Kite Mr Moonlight Nick Tortelli Niles Crane Norm Peterson Norwegian (Norway) Paul McCartney Peter Campbell	
Subject:	View Test documnt	

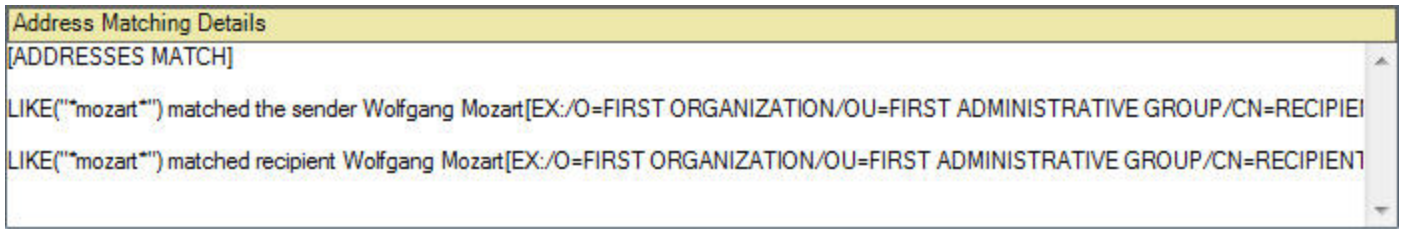
Detail Information:

If you hover over an address, you will see details for the address in a yellow tool tip:

From:	Wolfgang Mozart	Fri 11/21/2008 3:04 PM
To:	te	Name: Wolfgang Mozart Type: EX
Cc:	M	Address: /O=FIRST ORGANIZATION/OU=FIRST ADMINISTRATIVE GROUP/CN=RECIPIENTS/CN=WMOZART

Name	Display Name for the address
Type	Address Type as defined by the originating email server. Likely candidates include EX for Exchange and SMTP for Internet addresses.
Address	The actual representation of the address property as used by the server and stored in the message. In the example above, the address is in Legacy Distinguished Name format, which is used for messages sent within the Microsoft Exchange servers.

Address Matching Details



This portion shows how the selected message matches against the address criteria.

The first line (in brackets) shows whether there was a match or not. If there was a match in the selected message, details for each matching address will be presented along with the information about the address and the criteria which it used.

Buttons:

<p>Clear</p>	<p>Clears all the entries in the Sample Emails list.</p>
<p>Add Emails</p>	<p>Allows the user to select emails to be included in the Sample Emails list. First the user selects a profile from the list. The profile will link to a Exchange Mailbox or PST file connected to the chosen or default profile on the machine. The dialog box will open to the root folder allowing the user to select a folder containing the relevant email.</p> <div data-bbox="581 995 1224 1520" data-label="Image"> <p>Choose a folder with sample emails</p> <p>Select a folder</p> <ul style="list-style-type: none"> Mailbox - Wolfgang Mozart <ul style="list-style-type: none"> Calendar CheckHeaders Contacts Conversation Action Settings Deleted Items Drafts Inbox Journal Junk E-mail News Feed Notes Outbox Quarantine <p>OK Cancel</p> </div> <p>Click OK to add messages from the selected folder to the Sample Email list.</p>
<p>Add PSTs</p>	<p>Opens a browse window to add messages located in PST files to the Sample Email list. Once a PST is selected via the Browse dialog, a folder selection dialog will appear.</p> <p>Choose a folder then click OK to add all messages from the selected folder to the Sample Email List.</p>
<p>Add MSGs</p>	<p>Opens a Browse dialog so users can enter one or more MSG files to the Sample Email List.</p>

See Also

- [Choose Addresses](#)

Keyword Tester

Discovery Attender provides a number of complex keyword options, from Search Expressions to Pattern Matching, to help you find the data you need. However, the variety of choice makes it a challenge to validate the keyword criteria to determine which results will be produced. The *KEYWORD TESTER* is a tool created to help you evaluate keyword lists and expressions without leaving the comfort of the search wizard. It is designed to help you determine if your expression is logically correct as well as syntactically sound.

Keyword Logic Tree

- OR - [KEYWORD HIT]
 - Mississippi
 - Fence NEAR Paint
 - cave
 - AND- [TRUE]
 - Arthur - [FOUND]
 - Court - [FOUND]
 - Yankee - [FOUND]
 - AND- [FALSE]
 - Tom
 - Becky
 - LIKE("Aunt?Polly")
 - bicycle - [FOUND]

Control Panel:

Reset Search_Sample Text Parse Text From File Parse File Search Raw Data

Perform Complete Search Merge filename Match Case

Keyword Hit Details

'bicycle' found 1 time(s)
@1086: nature of his armor. revolutionized tranport of knights by bicycle

'Arthur' found 5 time(s)
@29: A Connecticut Yankee in King [Arthur]'s Court is an 1889 novel by American humorist and writer Mark Twain. The book was originally

'Court' found 4 time(s)
@38: A Connecticut Yankee in King Arthur's [Court] is an 1889 novel by American humorist and writer Mark Twain. The book was originally

'Yankee' found 4 time(s)
@14: A Connecticut [Yankee] in King Arthur's Court is an 1889 novel by American humorist and writer Mark Twain. The book was originally

Who should use the Keyword Tester?

- If you have any doubt about how an expression or pattern will be evaluated by *Discovery Attender*, use the Keyword Tester.
- If you are using a keyword list, use the Keyword Tester for its testing capabilities as well as verifying how items are parsed.
- Use the tester to assist in refining your search criteria before a search is initiated or after, to answer questions as to why an item did or did not hit after a search.

What can the Keyword Tester do?

The main functionality, as the name suggests, is to test keyword criteria for syntax, validity, proper structure, efficiency and effect. It is designed to assist a user in understanding how *Discovery Attender* evaluates a given list of words, patterns or search expressions. It can also be used to answer questions as to why a search expression matched (or not) given a file or snippet of text.

What doesn't the Keyword Tester do?

While the Keyword Tester is unsurpassed at letting users automatically know when an expression is *syntactically* incorrect, it cannot automatically test for items that are *logically* incorrect. That is why it is important to always to test the expressions using the **SEARCH TEXT** and **SEARCH FILE** buttons to enter sample data that the given expression *should* match, and also data that it *should not* match.

Using the Keyword Tester

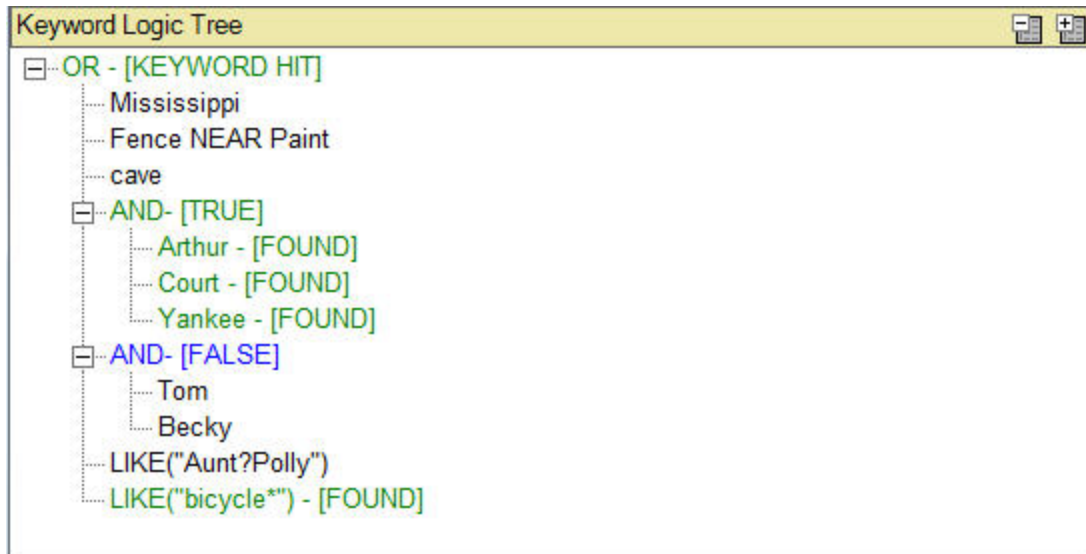
The following steps should prove helpful in using the keyword tester. Before starting, make sure you have a sample text or file that you know should match your criteria, as well as samples that should *not* match your keyword criteria.

Step 1	Enter your criteria into the Choose Keyword Criteria wizard screen
Step 2	Click on the Test button of the <i>CHOOSE KEYWORD</i> wizard screen. If your criteria is not syntactically correct, an error message will appear. You must correct the error before the tester will open.
Step 3	The keyword logic tree of the Keyword Tester will be populated. Review the tree to verify the search engine will evaluate your criteria as intended.
Step 4	Enable the optional settings (Complete Search , Merge Files or Match Case) or keep the defaults.
Step 5	Use the buttons and options on the Search Panel to test sample text , a file in native format , in memory or a file in binary format.
Step 6	Click OK to submit the test item.
Step 7	The logic tree will change from all black to highlights of blue or green depending on whether a hit was found or not.
Step 8	If a hit was found with your test sample, the Details section is populated with data about the hits. Review this data to verify that any hits found are valid.
Step 9	Adjust your criteria in the search wizard or hit reset to test more items.

Keyword Logic Tree

The Keyword Logic Tree is a visual representation of how the Discovery Attender search engine will evaluate a search expression or list. Each line, or 'leaf' is a word or phrase to evaluate. The leafs are joined in to 'branches' rooted in the logical operators.

The Keyword Logic Tree can be used for two purposes. First, to validate that a search expression parses as expected. Secondly, it is used to show how the search engine has evaluated test data.



Keyword Logic Tree: Standard Parsing

Hint: Experiment with various expressions to see how they will parse. The more narrow a tree, the more efficient the search. Use the expressions in [Example A](#) below with the Search Expression Tester to understand the differences format can make in the evaluation of an expression.

In addition to representing a format of an expression, the logic tree also provides a visual map of how a keyword hit is represented from the sample test item.

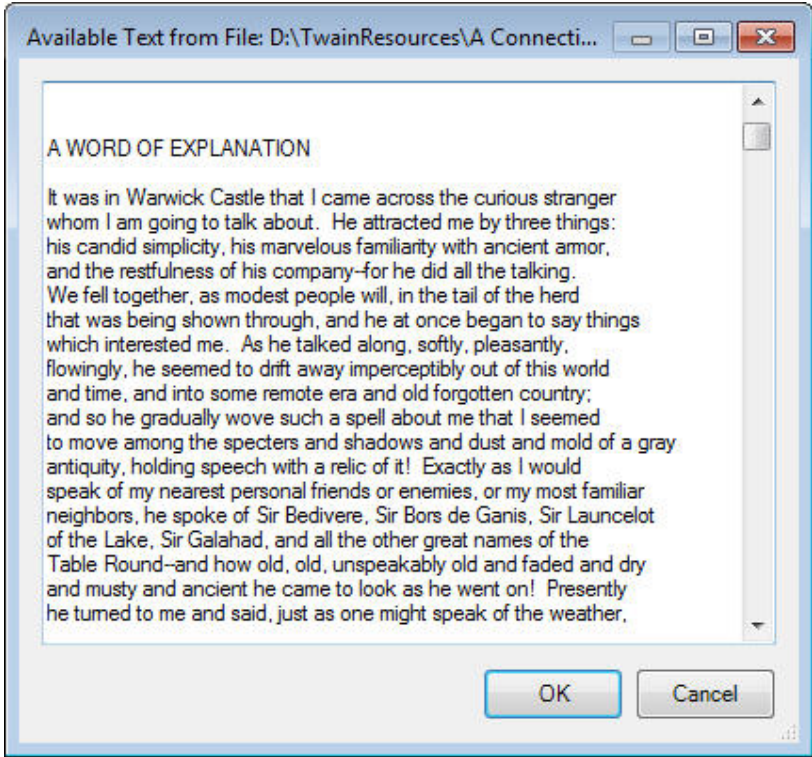
A **green font** leaf (a.k.a a line) indicates that word or phrase was found. The word **[Found]** will be added to the leaf.

The Operator branch (e.g. **AND- [TRUE]**) will also be changed to a **green font** *if* that branch matches the criteria. If a branch does not match the criteria, it will appear in **blue** with the word **[False]** appended to it (e.g. **AND- [FALSE]**).

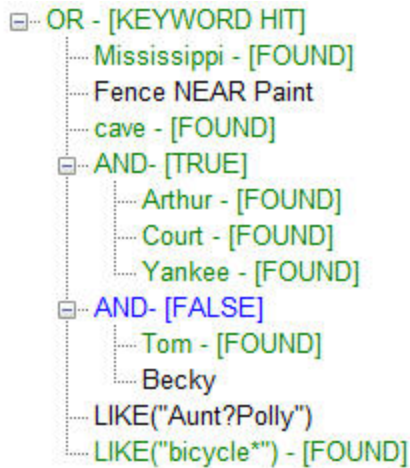
The root operator that appears at the very top of the tree will list the final result of the Test. It will append **[Keyword Hit]** for a successful test or **[Not A Hit]** for when no match was found.

Search Panel

<p style="text-align: center;">Reset</p>	<p>Resets the logic tree</p>
	<p>The remaining buttons allow a user to mimic the various styles of search using sample text or files for parsing.</p>
<p style="text-align: center;">Search Sample Text</p>	<p>Allows the user to enter sample text to test against the keyword criteria. Enter the text and then click OK to process your sample text.</p> <div data-bbox="630 506 1354 951" data-label="Image"> </div>
<p style="text-align: center;">Parse Text From File</p>	<p>This option will search a file against the keyword criteria in native format, parsing the available text and displaying it in a new window. This is the equivalent of selecting Native Format from the Keyword Options wizard screen.</p> <ul style="list-style-type: none"> • Select the sample file using the browse window. • The <i>AVAILABLE TEXT</i> window will open. This shows the text that has been parsed from the selected sample file:

	 <ul style="list-style-type: none"> • Click OK to submit the entry for testing.
<p style="text-align: center;"><input type="button" value="Parse File"/></p>	<p>Similar to the option for PARSE TEXT FROM FILE, the PARSE FILE option searches in native format and mimics a file searched in memory (found in GENERAL SEARCH node in the Settings), which does not produce visible text.</p> <p>Click this button to select a file to be ingested into the logic tree.</p>
<p style="text-align: center;"><input type="button" value="Search Raw Data"/></p>	<p>Similar to the PARSE FILE option, except the search engine will evaluate the file as binary (raw data level). This is the equivalent of selecting 'Raw Data' in the Keyword Options wizard screen.</p>
<p>Perform Complete Search</p>	<p>This option brings back hit values for any keyword that matches in the tree. This is the equivalent of the Complete Search in the Keyword Options wizard screen.</p> <p>If this option is not selected, only the first set of matching criteria will be returned. This is the equivalent of the Simple Search in the Keyword Options wizard screen.</p>
<p>Merge Filename</p>	<p>Tests files with the filename included with the body. This is effective for testing the Merge Fields options in the File Options wizard page.</p>
<p>Match Case</p>	<p>Check this item if you would like the tester to only find items that match the case (Upper Case, Lower Case) of the search expression.</p>

Once a logic type and sample (be it file or text) has been inputted, the **Keyword Logic Tree** will change to reflect the evaluation of the text.



Please Note: The maximum number of characters that any single branch of the logic tree that can be display ed is 259. Any term more than 259 characters will show only the first 259 characters.

In addition, the **Hit Detail** will change to reflect items found.

```

'bicycle' found 2 time(s)
@566664: me, a-tilting!-five hundred mailed and belted knights on [bicycle]s! The grandest sight that e

'cave' found 24 time(s)
@627623: ty-two. As a next move, I paid a private visit to that old [cave] of Merlin's-not the small one-the

'Mississippi' found 3 time(s)
@408919: etty to see. It resembled a steamboat explosion on the [Mississippi]; and during the next fifteen
  
```

Details Section

This section lists the hits from the test item. If the Complete option is selected, there will be one entry per keyword hit.

```

Keyword Hit Details
'bicycle' found 2 time(s)
@566664: me, a-tilting!-five hundred mailed and belted knights on [bicycle]s! The grandest sight that e

'cave' found 24 time(s)
@627623: ty-two. As a next move, I paid a private visit to that old [cave] of Merlin's-not the small one-the

'Mississippi' found 3 time(s)
@408919: etty to see. It resembled a steamboat explosion on the [Mississippi]; and during the next fifteen
  
```

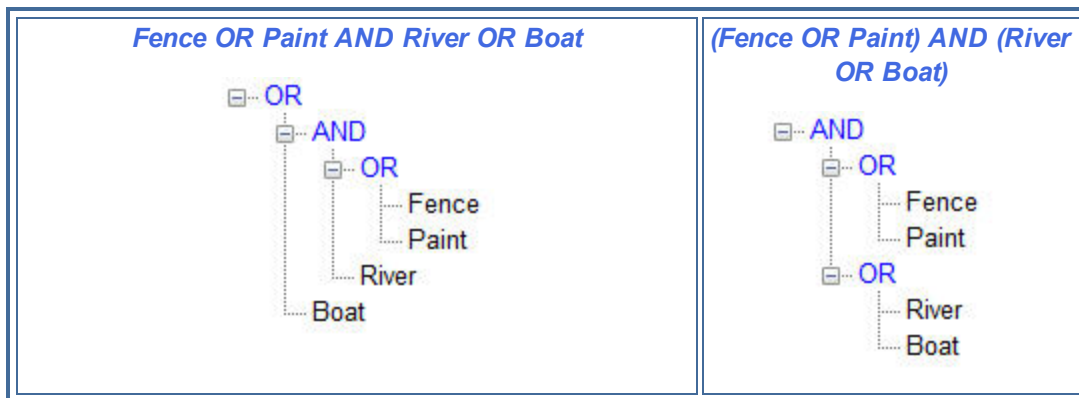
Each entry will provide several points of data. The example below uses the "bicycle" entry above.

Section	Example	Description
---------	---------	-------------

<i>Keyword</i>	"Bicycle"	The keyword or phrase which matched the criteria.
<i>Count</i>	found 2 time(s)	Number of times the item was found in the sample text or file
<i>Location</i>	@56664	The character at which the matching text was last located.
<i>Context Hit</i>	[bicycle]	Outlines the keyword in the returned snippet

Examples

A. To help understand how the Keyword Tester works, check the difference between the grouping of search expressions.



Hint: Always use parenthesis to group items which need to be evaluated together.

B. Use the search expression: *(Blue OR Green) AND (Red or Yellow)* with the following tests to get an idea of how the tester will appear

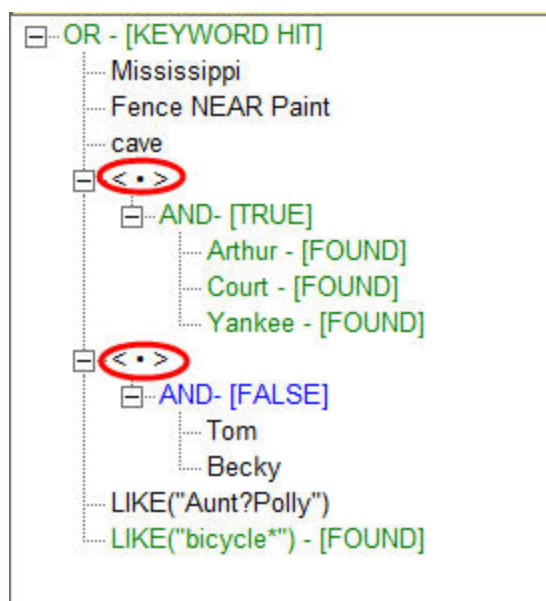
<i>Text</i>	<i>Result</i>	<i>Screen</i>
The blue bird found the red ball in the white snow.	Hit	

The blue house has purple shutters.	No Hit	<pre> AND - [NOT A HIT] ├── OR- [TRUE] │ ├── Blue - [FOUND] │ └── Green └── OR- [FALSE] ├── Red └── Yellow </pre>
-------------------------------------	--------	---

C. Experiment with your own keywords to see how they will be evaluated with real data

Using Keyword Expression Hit Delineation (<,>):

Reporting hits on a branch or original expression level requires the use of carrots entered as part of the keyword criteria. The keyword tester will add a node to indicate that this kind of reporting has been defined:



See Also

- [Choose Keywords](#)

Sherpa Text Viewer

When a result is opened in the Result Management screen, users have a choice to use the built-in viewer to render the text from the results.

Please note: The **Preview Pane** in the results screens is based on the *Sherpa Text Viewer*.

To use the viewer successfully, please be aware of the following:

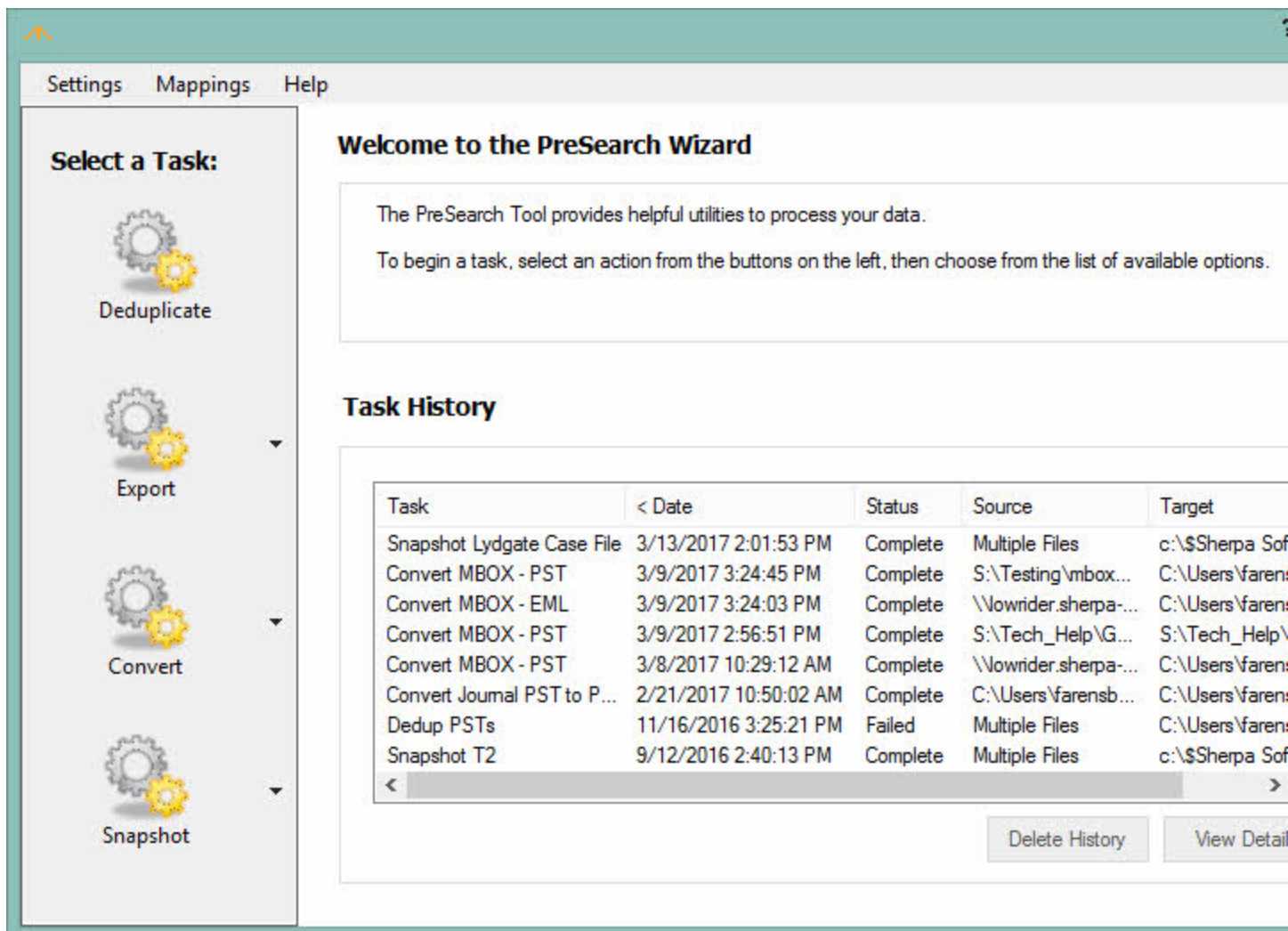
- The *Sherpa Text Viewer* must be selected as the default result viewer in the [Viewer Options](#) in *Tools | Settings | Results*.
- Not all file types can be opened. If the *Sherpa Text Viewer* encounters a file that it cannot parse, no text will appear.
- If no keywords were used in a search, the text **[No Matches]** will appear in the **Keyword** section.
- If the *Sherpa Text Viewer* is not installed, result items will open in their native application.
- You can also set log files to open in the *Sherpa Text Viewer*, to do so, go to the [Logs](#) node in *Tools | Settings*.
- The *Sherpa Text Viewer* contains its own help document if you wish to explore its advanced features.
Regular Expression matches often cannot be highlighted.

See Also

- [Result Management](#)
- [Open Results](#)

PreSearch Tool

Discovery Attender contains a stand alone utility that offers a variety of functionality to deduplicate, export and convert data stores.



The PreSearch tool is accessed from the [Main Console](#) using the *Tools | PreSearch Tool* menu option or from the [Welcome Screen](#) by selecting the *PreSearch Tool* option. All functions in the PreSearch Tool are enabled using a wizard interface. The tool contains its own help document with more detail on each screen. For an overview of options, see below.

Although Discovery Attender functionality does cover many of the options found within the PreSearch Tool, it tends to be significantly slower due to enhanced logging and database storage of metadata. Discovery Attender must always run a two or three step process to achieve these goals, while the PreSearch tool tends to be more efficient and quicker, albeit with less logging.

Options

	Description
Deduplicate	Deduplicates PST files (without running a search)
Export	
O365	

365 to EML	Copies all items from cloud based Office 365 (or other EWS source) to individual EML files
365 to PST	Copies all items from cloud based Office 365 (or other EWS source) to PST files
<i>Exchange</i>	
Mailbox to PST	Copies all items in an Exchange Mailbox to a PST file
Online Archive to PST	Copies all items in an Exchange Online Archives to PST files
IMAP to PST	Copies messages from Web based IMAP data stores (e.g. Google Mail) to PST files
NSF to EML	Copies messages from NSF files into individual EML files (native format)
<i>PST</i>	
PST to PST	Creates a new PST using the selected filters (date, message type, etc.O
PST to EML	Copies messages from PST files into individual EML files
PST to MSG	Copies messages from PST files into individual MSG files (native format)
Attachments to File	Exports a copy of all attachments in the PST file to the designated file share
Split	Breaks up the chosen PST into a new set of smaller PSTs (size is customizable)
Convert	
<i>Journal Export</i>	These options convert messages in journal format to standard format PSTs...
Mailbox to PST	...from source data in a mailbox
PST to PST from source data in an existing PST
<i>MBOX</i>	
MBOX to EML	Converts MBOX files to a set of individual EML files
MBOX to PST	Converts an MBOX to PST file format
<i>MSG</i>	
MSG to EML	Converts individual MSG files to EML files
MSG to PST	Imports loose MSG files into a PST file.
<i>NSF to PST</i>	Transforms the items found in Lotus Notes NSF Mail Files to PST Files. Note: this functionality is only valid for NSF files in a Mail format. No other Notes applications are convertible using this tool.
<i>OST to PST</i>	Converts Outlook Offline Data Stores (OST files) into PST files.
<i>EML to PST</i>	Converts individual EML messages to PST format.

Snapshot

Provides statistics for the PST including address list, relationships, date range, domain list, folder list and more. Useful for analysis or early case assessment.

Contact Information

Sherpa Software Group

456 Washington Rd, Suite 2
Bridgeville, PA 15017
www.sherpasoftware.com

Toll-free: 800.255.5155 (in the United States)

Direct: 412.206.0005

Fax: 412.206.0018

Email: information@sherpasoftware.com

Technical Support

You have several choices to contact technical support. You will need an active user name and pin to access support.

Please note: If you are testing the evaluation software and need technical support, please contact your account manager who can direct you to the proper resources.

On-line

- Log onto the Sherpa Software website with your username and password.
- Select '**Support Request**' from the left side menu.
- Fill out the support form. Be sure to verify the listed phone number and email address so you can be contacted.
- Click '**Send**' and your request will be submitted.

Please note: In addition to technical support, the website is rich in customer resources. You can download new releases, manage your account, view tutorials and more.

By Phone

- Contact our Technical Support line at 412-206-0016.
- Enter your User ID followed by the pound (#) sign.
- Enter your PIN number followed by the pound (#) sign.
- Follow the remaining prompts to help us direct your call to the proper support personnel.