


Discovery Archive User Guide

Discovery Archive is a fully managed web-based service that allows your company to proactively respond to litigation requests and ensure adherence to company communication policies. Designated individuals in your company can use Discovery Archive to search through current and legacy emails, permanently store material for litigation purposes, and export materials for review by outside parties.

The following User Guide provides additional information about Discovery Archive and instructions for using its key features. You can also download the [Discovery Archive User Guide](#) in PDF format.


 Collaborative Discovery (accessed from the E-Discovery tab) includes all the Matter Management features in Discovery Archive that allow multiple reviewers to interact and collaborate on litigation Matters during the e-discovery process. Please refer to the [Collaborative Discovery Guide](#) for more information about using these new features of Discovery Archive.


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Log in to Discovery Archive

When your company signs up for Discovery Archive, you are provided with a username and password. With these credentials, you can log in to Discovery Archive and start setting up accounts for individual users.

 All Discovery Archive users should exercise caution when accessing their accounts from public computers to maintain the confidentiality of company emails, especially individuals assigned to Administrator or Reviewer roles.

 If your company signed up for Discovery Archive and you have not received your credentials, please contact your administrator.

To log in to Discovery Archive

1. Navigate to your Discovery Archive URL.

Discovery Archive

Security ([show explanation](#))

☒ This is a public or shared computer
☐ This is a private computer

User name:

Password:

([Forgot Password](#))

2. Select a Security option.

Refer to the following table for more information:

This is a public or shared computer	Discovery Archive prompts you for your user name and password each time you access the login screen and automatically logs you out after 20 minutes of inactivity. <i>Default option selected</i>
This is a private computer	Discovery Archive stores your credentials in your browser's local profile cache for 1 year allowing you to bypass the login screen after your initial successful login. You can clear this setting by logging out of Discovery Archive.

3. Enter your user name and password.

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

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About Discovery Archive Roles

The three roles available in Discovery Archive include:

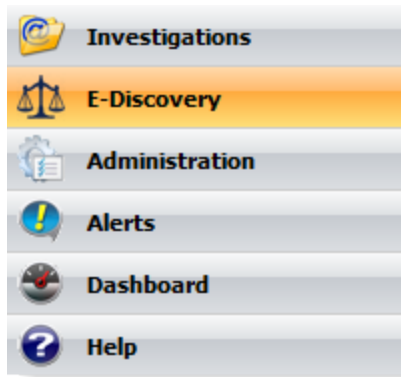
- Administrators
- Reviewers
- Accounts

Each role has a unique set of permissions and features accessible from the menu options.


In addition to these available roles, administrators can also create External Reviewer accounts. External Reviewer accounts allow non-Discovery Archive users to review emails within Matters assigned to them. Please see the Archive Administration User Guide for more information about creating External Reviewer accounts.


Administrator Role

Available Menu Options: *Investigations, E-Discovery, Administration, Alerts, and Dashboard*



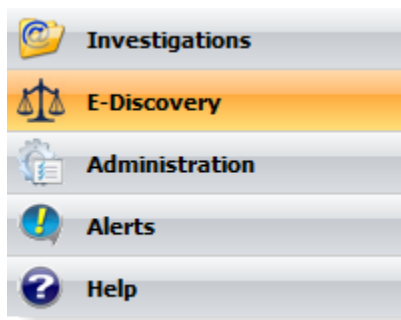
The Discovery Archive Administrator role is for system administrators that need to configure Discovery Archive or HR personnel that need to monitor employee email usage. Given the sensitive nature of the information available to Administrators, we highly recommend they take special care to protect their login credentials. In order for Administrators to monitor the email usage of all employees, they must be given permission to "Monitor All Accounts" when being assigned the Administrator role. See [Assign the Administrator Role](#) for more information.


 It is possible to restrict Administrator access. Please refer to the Archive Administration User Guide for more information.

 Administrators can receive email notifications each time a message is flagged in the Alerts area. See [Policy Alerts](#) for more information.


Reviewer Role

Available Options: *Investigations, E-Discovery, Administration (for Preferences Only), and Alerts*



 Reviewers can use the Administration tab to change their own password and personal time zone.

Reviewers typically monitor other employees' emails for material that does not follow company communication policies. An Administrator or HR representative typically reviews the email of Reviewers, so that no employees are exempt from following company communication policies. Administrators assign individuals the role of Reviewer in the Administration Console, located outside the Discovery Archive interface. See [Assign the Reviewer Role](#) for more information.

 Organizations should take special care in selecting the appropriate employees for the Reviewer role, since Reviewers can see other employees' emails. It is also important to ensure that Reviewers do not share their user name and password with anyone.

Within Discovery Archive, Reviewers can execute two types of searches:

- Open-ended investigative searches against one or all user archives assigned to them.
- Targeted e-discovery searches against one or more archives in the E-Discovery tab.

Reviewers can perform the following functions:

- Search for emails that pertain to a Matter
- Save and assign searches to other reviewers
- Export emails and place emails on legal hold
- Export emails

Account Role

Available Options: *Investigations and Administration (for Preferences Only)*



i Account users can use the Administration tab to change their own password and personal time zone.

Discovery Archive users start with the general Account role. These users can access Discovery Archive to view their own historical emails only via the **Investigations** tab.

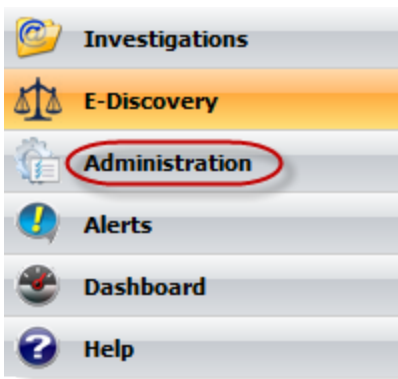
✓ Personal Archive is the preferred access method for users to view historical emails, even if users can access Discovery Archive. Personal Archive allows users to tag and restore archived emails into their own inbox.

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Assign the Administrator Role

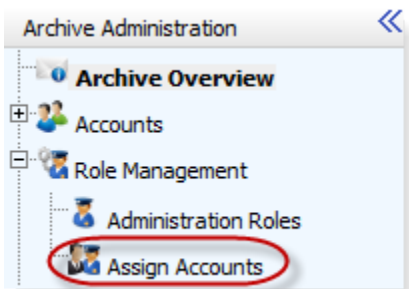
To assign a user the Administrator role

1. Select the Administration tab. The Archive Administration console opens in a new browser window.



i Only System Administrators or Role Managers have access to the Archive Administration console.

2. Select **Assign Accounts** from the **Role Management** node.



3. Select a user from the list.
4. Click in the **Role** field and select **Administrator**.
5. Select the **Monitor All Accounts** checkbox to allow the user to monitor all user accounts.

6. Select the **Discovery Administrator** checkbox in the Group Privileges section.

The screenshot shows a web interface for managing user roles. At the top, there are 'Save' and 'Cancel' buttons. Below them is a header 'Role Change - bill.williams@enron.com'. A red oval highlights the 'Role' dropdown menu set to 'Administrator' and the 'Privilege' checkbox for 'Monitor All Accounts'. Below this is the 'Group Privileges' section. On the left, under 'Built-in Roles', a list of roles is shown with checkboxes: Account Manager, Role Manager, Policy Manager, Retention Manager, Continuity Manager, Discovery Administrator (highlighted with a red oval), and System Administrator. On the right, a green arrow points to a list of privileges: View All Accounts, Archive Overview, Reset Password, and View Provisioning Options.

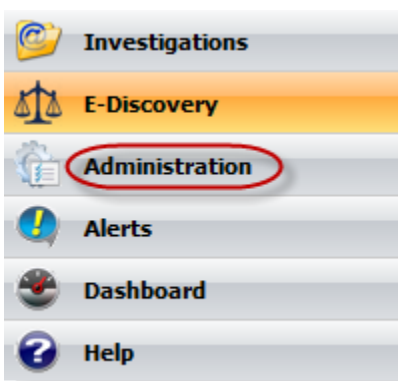
7. Click **Save**.


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Assign the Reviewer Role

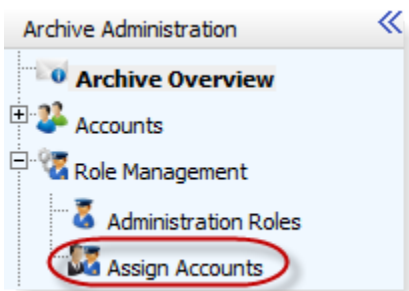
To assign a user the Reviewer role


1. Select the Administration tab. The Archive Administration console opens in a new browser window.




 Only System Administrators or Role Managers have access to the Archive Administration console.

2. Select **Assign Accounts** from the **Role Management** node.



3. Select a user from the list.
4. Click  in the **Role** field and select **Reviewer**.
5. Select the **Monitor All Accounts** checkbox to allow the user to monitor all user accounts.

 Click **Add/Remove Monitored Accounts** to manually select accounts for this reviewer to monitor.


 A screenshot of the 'Role Change - bill.williams@enron.com' dialog box. At the top are 'Save' and 'Cancel' buttons. Below is a section with a user icon and the title 'Role Change - bill.williams@enron.com'. In the center, there is a 'Role' dropdown menu set to 'Reviewer' and a 'Privilege' section with a checked checkbox for 'Monitor All Accounts'. This central section is circled in red. At the bottom, there is a section titled 'Accounts To Monitor' with a button labeled 'Add/Remove Monitored Accounts'.

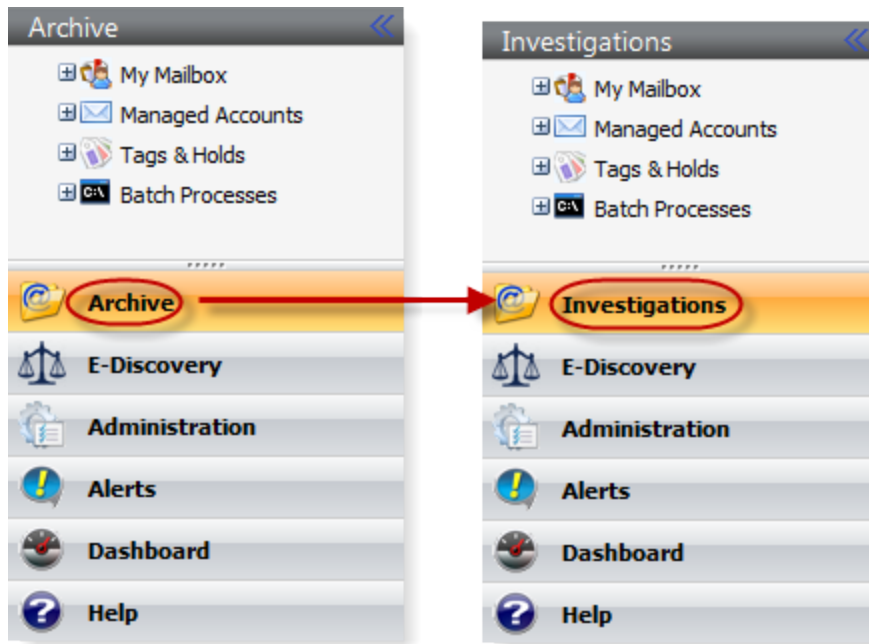
7. Click **Save**.

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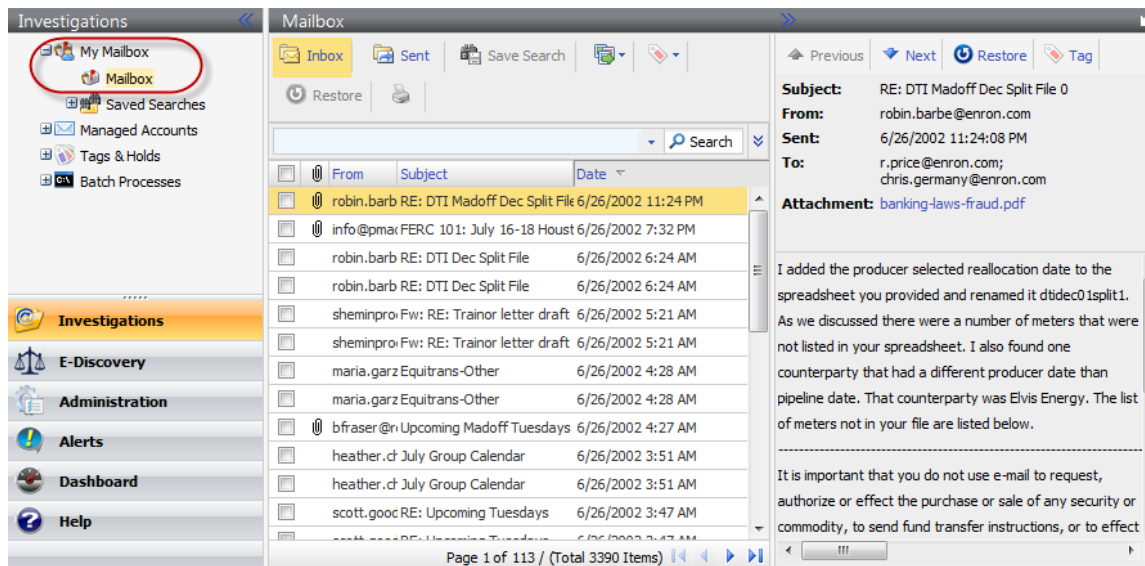
Browse My Mailbox


All users, including Administrators, Reviewers, and General Accounts, can view and access their own archived emails in the **My Mailbox** node of the Investigations pane. Users can view all their archived emails in the mailbox, including emails deleted from their inbox.

 The **MyMailbox** node is now available in the Investigations tab.



Once a user selects an email, a preview appears on the right side of the screen. This preview displays all content and any attachments included with the original email. This convenient feature allows users to review email content quickly and easily without having to open each email in a separate screen.

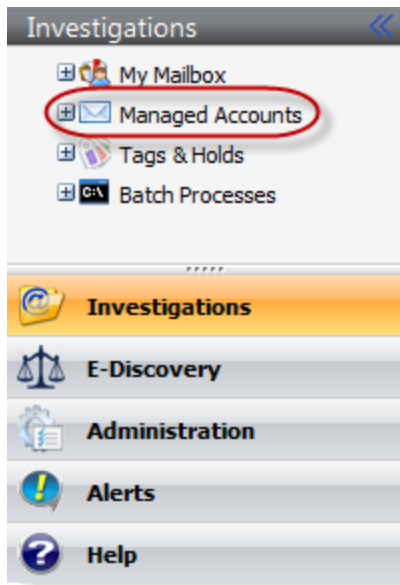



✓ Users can click  to change the display location of the selected email.

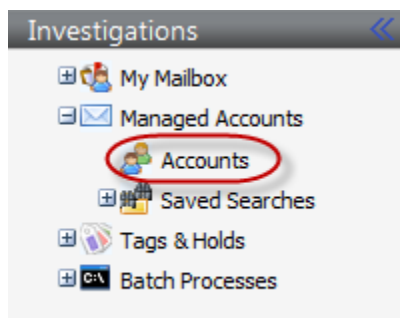
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About Managed Accounts

The **Managed Accounts** node is available to users granted the Administrator or Reviewer roles.

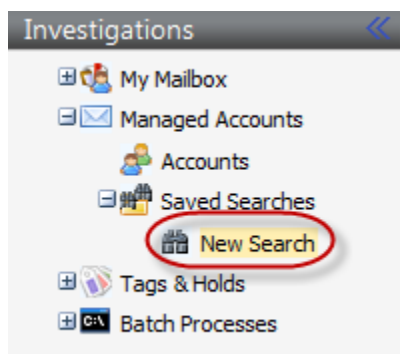


 All the accounts assigned to you display when you select **Accounts** from the **Managed Accounts** node.



 You can use the features available from the **Managed Accounts** node to conduct initial, probative, or ad hoc investigations in an archive, outside of the legal discovery workflow. Once you are ready to conduct searches and reviews on a specific subject, you should create a Matter to track these searches.

 Expand the **Saved Searches** node and select **New Search** to perform a search across all archives assigned to you.



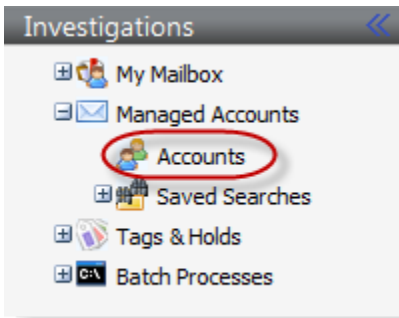
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Search Managed Accounts

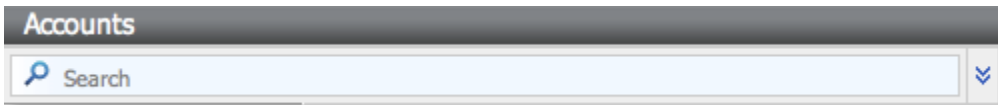
From the Accounts page, you can search for users assigned to you.

To search for users using basic search


- 1. Expand the **Managed Accounts** node and select **Accounts**.

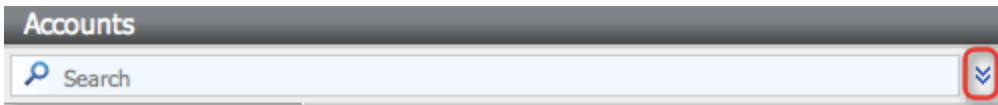


- 2. Enter the user's display name or email address in the search field and click .



To search for users using advanced search


- 1. Click  to display the Advanced Search menu.



- 2. Enter your search criteria. You can use any combination of the search criteria fields.

Refer to the following table for more information:

Search Criteria	Description
Email Address	Enter the email address or part of an email address for the user.


Role	Click  and select the role for the user.
Last Name	Enter the last name or part of the last name for the user.
First Name	Enter the first name or part of the first name for the user.

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Perform Searches

Recommended Practices for Discovery Archive Search

Discovery Archive's robust search functionality allows users to quickly and easily search for specific emails, groups of emails, domains, accounts, saved searches, or reports. Basic search functionality is available regardless of the tab or menu tree you are working under.

 Users assigned the Accounts role can perform searches only within their own archives, while Reviewers and Administrators have a wider variety of search options.

Discovery Archive includes Basic Search or Advanced Search. Depending on your administrative privileges and the area of Discovery Archive you are searching, you can use these features to search:

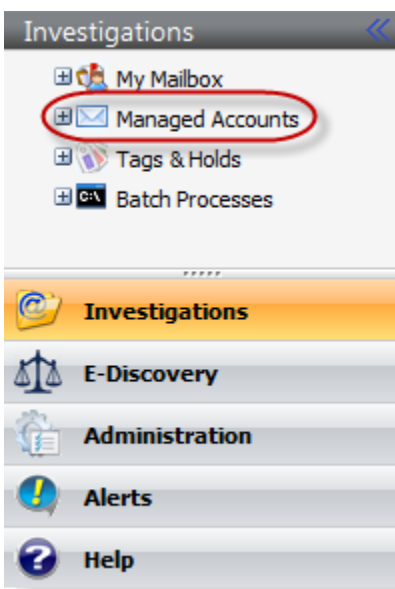
- A single archive (Accounts in **Managed Accounts** node)
- All archives (New Search in **Managed Accounts** node)
- The archives for a subset of users (E-Discovery tab)

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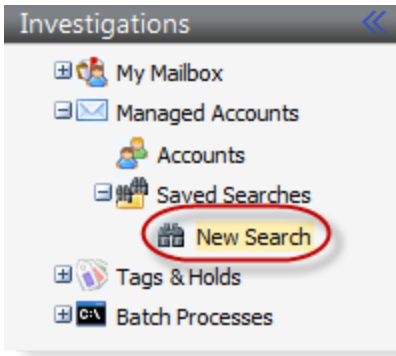
Basic Search

To conduct a basic search

1. Expand the **Managed Accounts** node.



2. Expand the **Saved Searches** node and select **New Search** to perform a search across all archives assigned to you.




3. Enter your search term in the Search field and click **Search**.

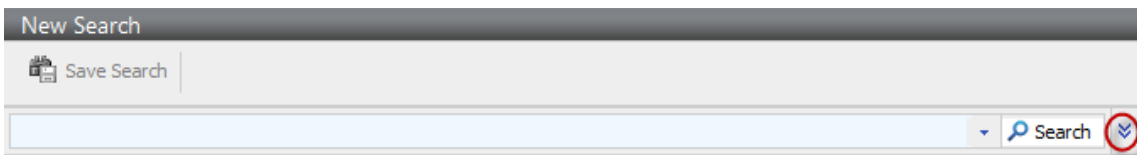


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Advanced Search

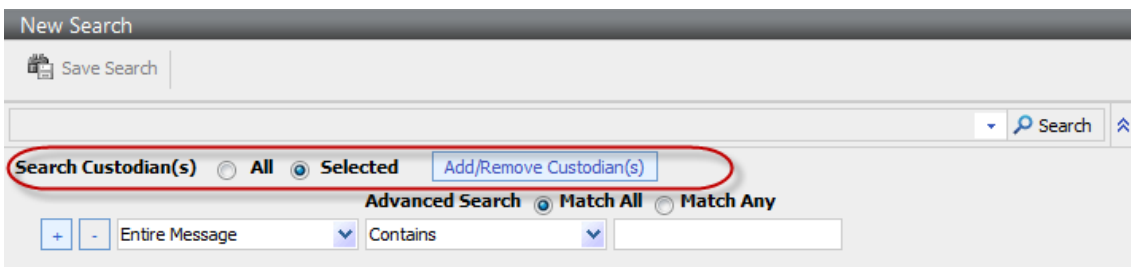
To conduct an advanced search

1. Click  to display the Advanced Search menu.




2. Select the user archives you want to search.

✓ Select **All** to search the archives of all users or **Selected** to choose users. If you want to choose users, click **Add/Remove Custodian(s)**.



3. Enter search terms and designate Advanced Search criteria. You have various options for the part of the message you want to search.

- ✓ Click  to add search clauses.
- ✓ You can choose to search for all or any of the search terms entered by selecting **Match All** or **Match Any**.

Advanced Search ☒ Match All ☐ Match Any

<input type="button" value="+"/> <input type="button" value="-"/>	Entire Message	Contains	Money
<input type="button" value="+"/> <input type="button" value="-"/>	Body	Doesn't Contain	

Subject
Body
From
To
Has Attachment
Attachment Name
Attachment Type
Date Sent (AND)
From / To

4. Click **Search**.

Save Search

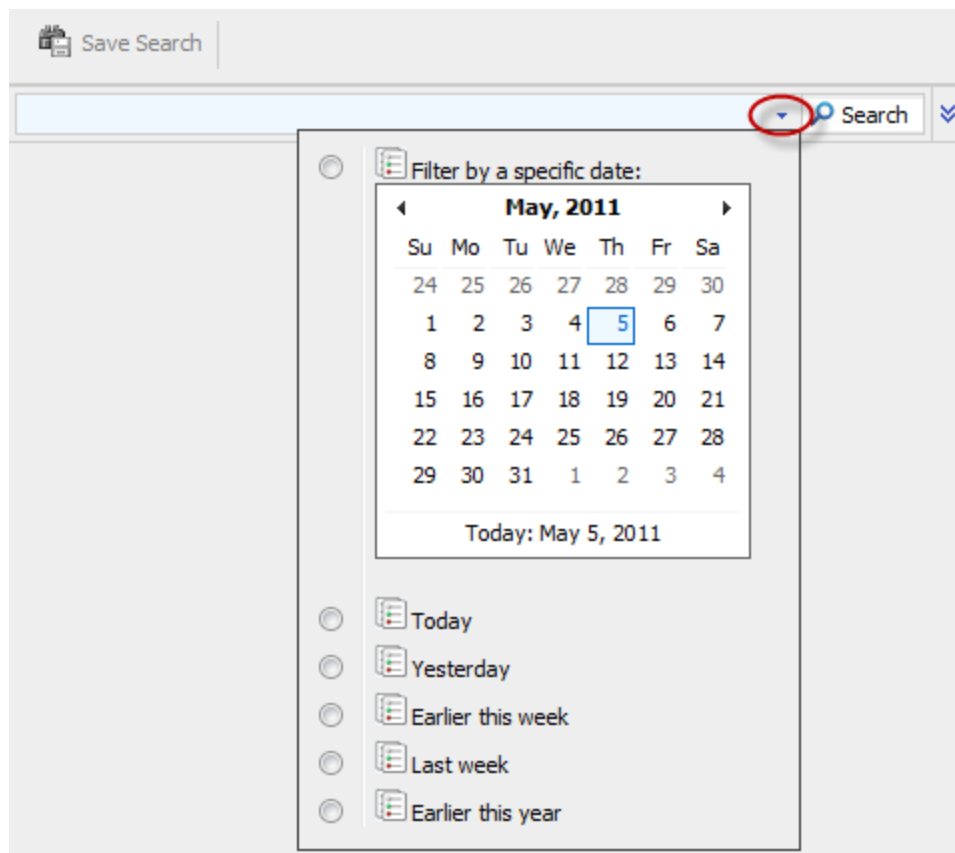
Search Custodian(s) ☐ All ☒ Selected

Email Address	Full Name
admin@enron.com	Primary Administrator
andrew.woodberry@enron.com	Andrew Woodberry

Advanced Search ☒ Match All ☐ Match Any

<input type="button" value="+"/> <input type="button" value="-"/>	Entire Message	Contains	Money
<input type="button" value="+"/> <input type="button" value="-"/>	Has Attachment	Yes	

✓ Click in the search field to filter search results by date.



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Search Guidelines

- Search terms are not case sensitive.
- Enter an uppercase AND between two search terms to find items with both terms.
- Enter an uppercase OR between two search terms to find items with at least one of the terms.
- Common words, also called stop words, are dropped from searches.

Stop Words

a, an, and, are, as, at
 be, but, by
 for, if
 in, into, is, it
 no, not
 of, on, or
 such
 that, the, their, then, there, these, they, this, to
 was, will, with

- Special characters and punctuation are interpreted as plain text and omitted from searches.
- Discovery Archive indexes the contents of attachments and allows you to search for specific attachments and/or search terms contained within attachments.

Refer to the following table for a list of supported attachment types:

File Extension	Attachment Type
.xls	Microsoft Excel Spreadsheet 2000-2003
.xlsx	Microsoft Excel Spreadsheet 2007-2010
.doc	Microsoft Word document 2000-2003

.docx	Microsoft Word document 2007-2010
.pdf	Adobe Acrobat files
.ppt	Microsoft PowerPoint presentation 2000-2003
.pptx	Microsoft PowerPoint presentation 2007-2010
.txt	Text files
.htm	HTML files
.html	HTML files
.pps	Microsoft PowerPoint slides
.zip	ZIP archives

 Discovery Archive does not index attachments that are password protected or encrypted.

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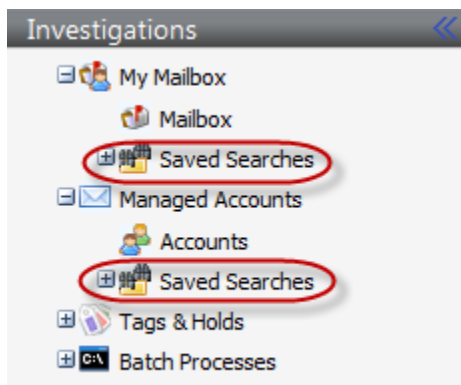
Search Tips

- Enter an upper case *OR* between two search terms to find emails with either search term — enter *sick OR vacation* to find emails that contain the words *sick* or *vacation*.
- Use quotation marks to find an exact phrase — enter *"cloud computing"* to find emails with this exact phrase.
- Enter an asterisk at the end of search terms to find similar words — enter *comp** to find emails with the words *computer*, *computing*, or *company*.
- Enter a question mark in the middle of search terms to find similar words — enter *te?t* to find emails with the words *test* or *text*.
- Enter an uppercase *NOT* between search terms to exclude specific words — enter *compliance NOT laws* to find emails with the word *compliance* that do not include the word *laws*. You cannot begin a search term with *NOT* because Discovery Archive does not return negative searches.
- Enter two search terms in quotation marks followed by a tilde and a numerical value to perform a proximity search — enter *"sick approved"~5* to find emails with the words *sick* and *approved* within five words of each other. An example result for this search would be *Your requested sick day from October 31 is approved*.
- Enter full email addresses to narrow search results — enter *sallybrown@acme.com* in the **From** field of the Advanced Search filters to find emails sent by Sally Brown.
- Use quotation marks to find full names — enter *"Sally Brown"* in the **To** field of the Advanced Search filters to find emails sent to Sally Brown.

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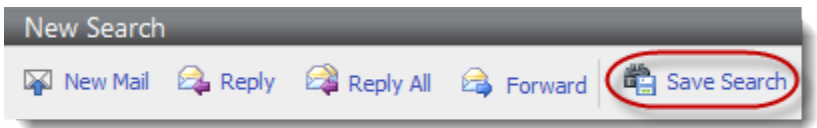
Create Saved Search

Discovery Archive users can create Saved Searches that retain the search criteria and results for future review. All users can create Saved Searches of emails in the **My Mailbox** node while only administrators and reviewers with the appropriate permissions can create Saved Searches in the **Managed Accounts** node.

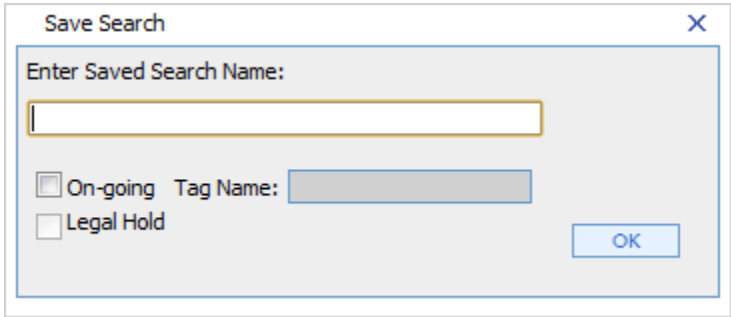


To create a Saved Search





- 1. Perform a Basic Search or an Advanced Search.
- 2. Click **Save Search**.




- 3. Complete the information in the Save Search window.

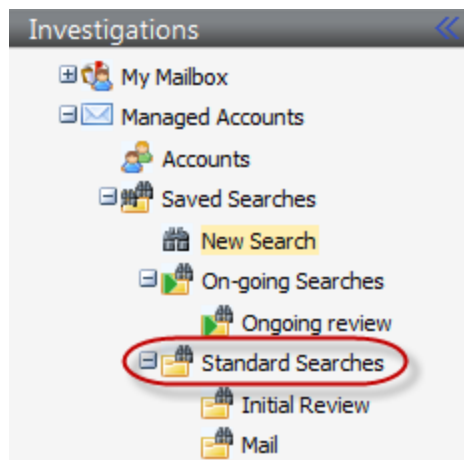


Review the following table for more information:

Enter Saved Search Name	Enter a name for the saved search.  By default, Discovery Archive automatically populates the Tag Name field with the name entered when you select the On-going checkbox.
On-going	Select to make the saved search an On-going Search.  New emails that meet the specified search criteria continue to be added to on-going searches after they are created. If you do not select the On-going checkbox, Discovery Archive saves the search as a Standard Search and will not update the search automatically to include new emails that meet the specified search criteria.
Tag Name	Provide a tag name for the emails associated with the saved, on-going search if you want it to be different than the search name.  This option is only available if you select the On-going checkbox.
Legal hold	Select to place all email in the Saved Search on legal hold. Emails on legal hold cannot be deleted from the Archive.  This option is only available if you select the On-going checkbox.

- 4. Click **OK**.

 Discovery Archive places searches in the **Standard Searches** node if you did not select the **On-going** checkbox when creating the search.

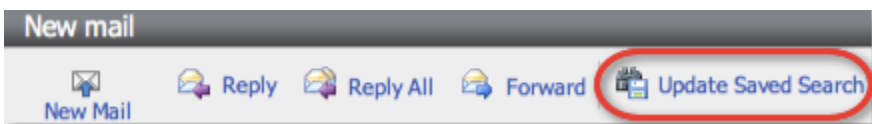


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Update Saved Search

To update a Saved Search

1. Select a search in the **On-going Searches** or **Standard Searches** node.
2. Click **Update Saved Search**.






3. Update the information in the Save Search window.

 A screenshot of the 'Save Search' dialog box. It has a title bar with a close button. The main area contains:

- 'Enter Saved Search Name:' label above a text input field containing 'Initial Review'.
- 'On-going' checkbox (checked) followed by 'Tag Name:' label and an empty text input field.
- 'Legal Hold' checkbox (unchecked).
- 'Save as New' and 'Update' buttons at the bottom.


Review the following table for more information:

Enter Saved Search Name	<p>Enter a new name for the saved search, if necessary.</p> <p>i By default, Discovery Archive automatically populates the Tag Name field with the name entered when you select the On-going checkbox.</p>
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On-going	Select to make a Standard Search an On-going Search or clear to make an On-going Search a Standard Search.  New emails that meet the specified search criteria continue to be added to on-going searches after they are created. If you do not select the On-going checkbox, Discovery Archive saves the search as a Standard Search and will not update the search automatically to include new emails that meet the specified search criteria.
Tag Name	Provide a tag name for the emails associated with the saved, on-going search if you want it to be different than the search name.  This option is only available if you select the On-going checkbox.
Legal hold	Select to place all email in the Saved Search on legal hold or clear to take all email in the Saved Search off legal hold. Emails on legal hold cannot be deleted from the Archive.  This option is only available if you select the On-going checkbox.

4. Select an option for updating the search.

Review the following table for more information:


Save as New	Select to create a new saved search with the new criteria.  You must specify a new name when saving an existing search as a new search.
Update	Select to update the existing saved search with the new criteria.

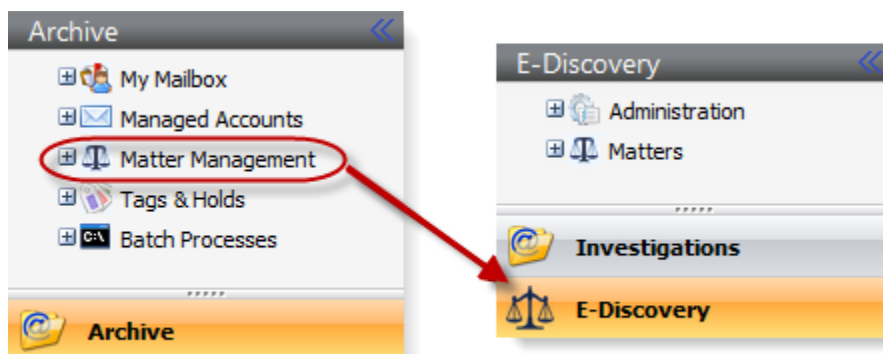
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About Matter Management

Collaborative Discovery (accessed from the E-Discovery tab) includes all the Matter Management features in Discovery Archive that allow multiple reviewers to interact and collaborate on litigation Matters during the e-discovery process. Once a Discovery Archive administrator creates a new Matter, the administrator or designated reviewers can use the Basic and Advanced Search features to find emails relevant to the Matter. These searches can then be saved and assigned to various reviewers to distribute the workload and expedite the e-discovery process. During the review process, reviewers can place emails on legal hold, apply review statuses or labels, tag emails, and add notes to emails that can be viewed by other reviewers working on the Matter. Additionally, Collaborative Discovery includes various reporting features that allow reviewers to view audit trails for individual emails or the history of an entire Matter.

Please refer to the [Collaborative Discovery Guide](#) for more information about using these new features of Discovery Archive.


 The Discovery Archive user interface has been updated. You can now access all the Matter Management features from the new E-Discovery tab.




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Forward Emails

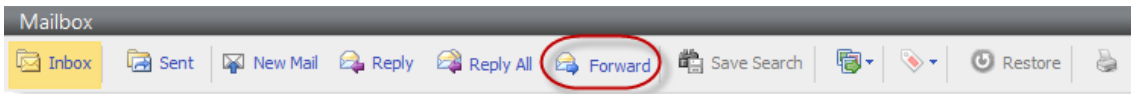
You can use Discovery Archive's forward feature to share emails with other reviewers or outside counsel.

 This functionality is only available if enabled for your organization.


 We recommend you only forward emails during the investigation phase, as forwarding emails changes its metadata and is not an appropriate means for collecting files during legal proceedings.

To forward an email from Discovery Archive

1. Browse the archive of accounts assigned to you or conduct a search.
2. Select the emails you want to forward.
3. Click **Forward**.



4. Enter the email address for the recipient of the emails.

 Discovery Archive automatically sends the emails to the recipient as individual emails in the original mail format.


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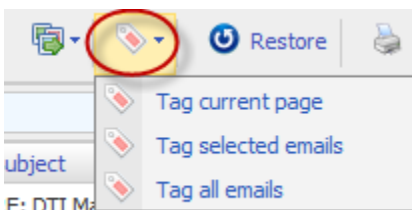
Tag Emails

During the review process, reviewers can tag emails for review at a later date or to share certain types of emails with another reviewer.

For example, if a search returns many emails that contain inappropriate words, the reviewer may need to review the results more closely to determine if the context in which the words were used are appropriate according to company policies. The reviewer can tag questionable emails and use the tag to retrieve these emails at a later time.

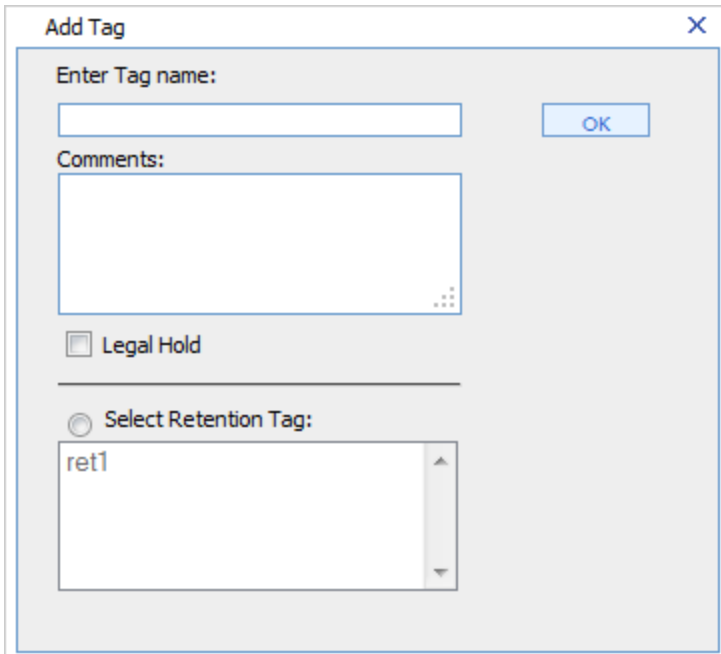
To tag an email

1. Browse the archive of accounts assigned to you or conduct a search.
2. Select the emails you want to tag.
3. Click .
4. Select **Tag selected emails** or choose one of the other options.



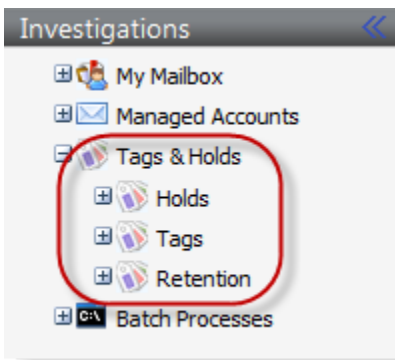
5. Enter a name and description for the tag.

 Select the **Legal Hold** checkbox if you want to place the emails on legal hold or select a retention tag.

The image shows a dialog box titled "Add Tag" with a close button (X) in the top right corner. Inside the dialog, there is a section labeled "Enter Tag name:" with a text input field and an "OK" button to its right. Below this is a section labeled "Comments:" with a larger text area. Underneath the comments area is a checkbox labeled "Legal Hold". A horizontal line separates this from the "Select Retention Tag:" section, which features a radio button and a list box containing the text "ret1".

6. Click **OK**.

✔ Tags appear in the **Tags & Holds** node of the Archive pane.



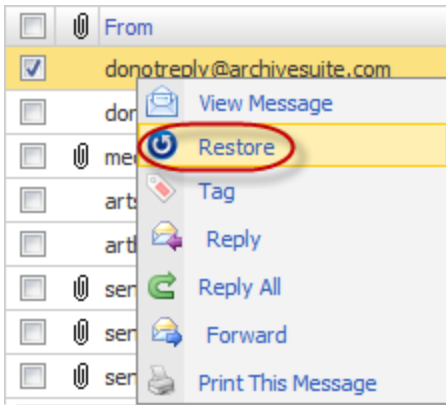
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Restore Emails

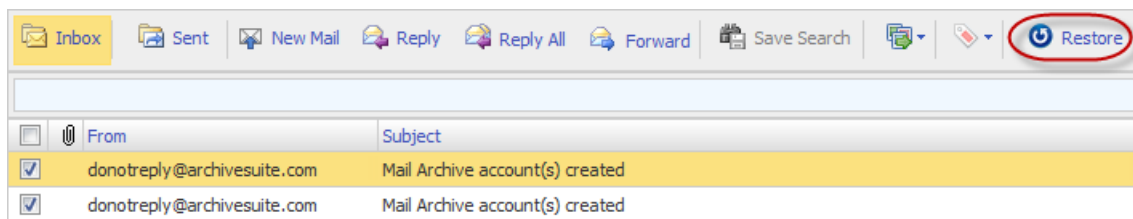
You can use the Restore feature in Discovery Archive to send an exact copy of the email back to any user's mailbox. The restoration process only takes a few seconds to complete. The restored email appears in the top of the user's Inbox with the date and time you restored the email. You can see the original timestamp of the email by opening it in your Outlook or Notes Inbox.

To restore an email

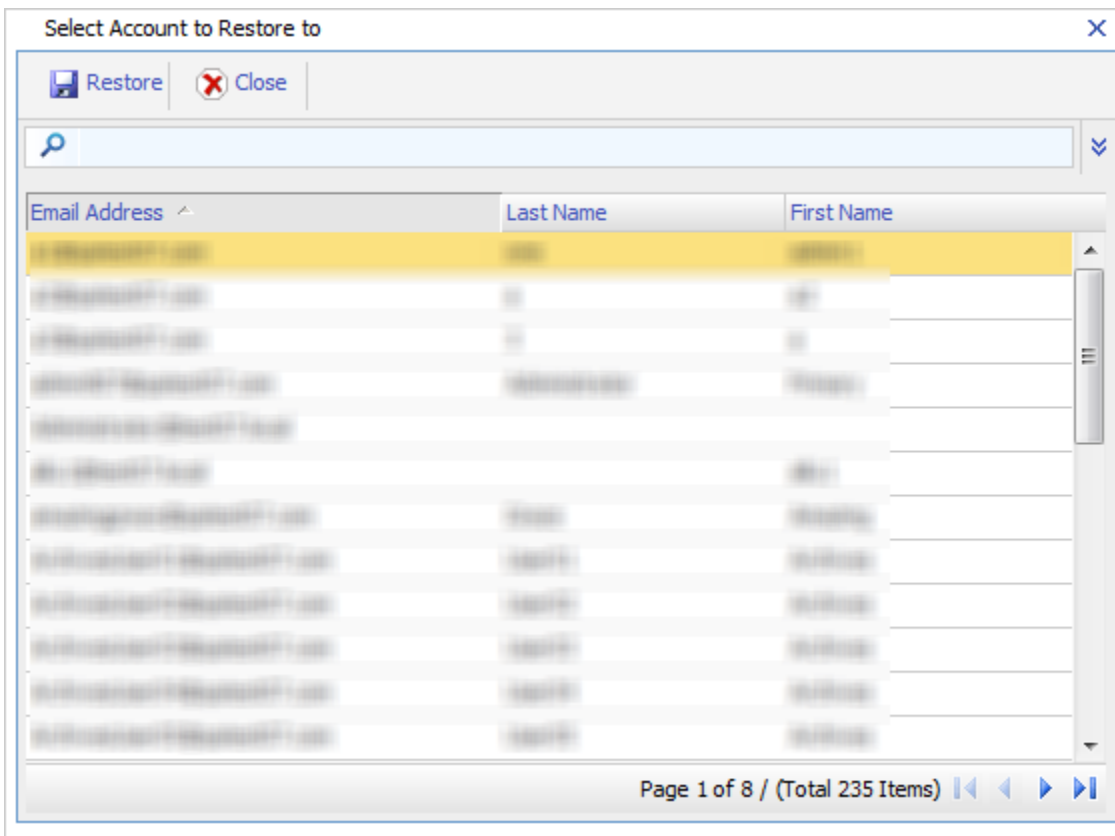
1. Right-click on the email you want to restore and select **Restore**.




✔ You can select the checkboxes of multiple emails and click **Restore** in the toolbar to restore multiple emails.



2. Select the user's account to which you want to restore the selected email.



✔ Click  to use the Advanced Search filter to find a user's account more quickly.



The image shows a 'Restore' window with a title bar containing 'Restore' and 'Close' buttons. Below the title bar is a search bar with a magnifying glass icon and the text 'Search'. The main area contains several input fields: 'Email Address:', 'Role:' (with a dropdown menu set to 'All'), 'Last Name:', and 'First Name:'.

3. Click **Restore**.

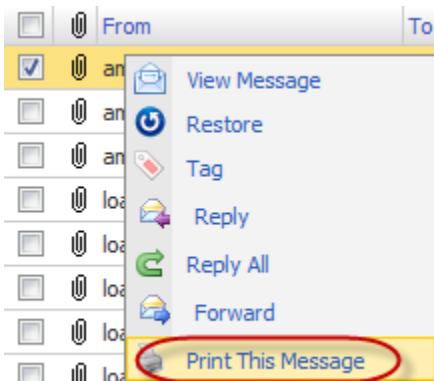
4. Click **Close** to close the restore window or select additional user accounts if you want to restore the selected email to additional accounts.

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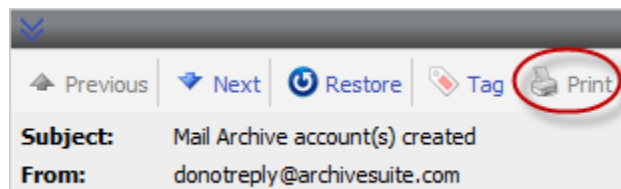
Print Emails

To print an email

- Right-click the email you want to print and select **Print this message**. The message preview pane displays.



- ✓ You can also click the **Print** icon from the message preview pane.



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Export Emails

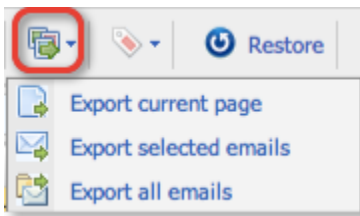
During the review process, reviewers can export emails in EML, NSF, PST, EML with EDRM, MSG with EDRM, and PST with EDRM format.

To export an email

- 1. Browse the archive of accounts assigned to you or conduct a search.
- 2. Select the emails you want to export.



- 3. Click .
- 4. Select **Export selected emails** or choose one of the other options.



- 5. Enter the required information in the Export Options window.

Export Options

You have selected 1 items (0.11 MB) for download. The size calculated is estimated and actual size on disc may vary.

Please select additional export options:

Message Format

EML

Include Journaling Envelope

☐

Export Name



Export Password


Confirm Password

Your download will be available as a single file segment.

Export Items

Review the following table for more information:

Message Format	<div>Click  and select one of the following file formats for the export file.</div> <div><div><div>EML</div><div>NSF</div><div>PST</div><div>EML with EDRM</div><div>MSG with EDRM</div><div>PST with EDRM</div></div><div><div></div><div>The Clearwell and FTI-Ringtail export options should not be used when exporting emails from the Investigations tab. These export options are used for the discovery process and should only be available when exporting emails from the E-Discovery tab.</div></div></div>
Include Journaling Envelope	Select this option to include journaling envelopes that contain detailed information about email recipients such as distribution lists.

Exclude Exported Emails	Select this option to exclude previously exported emails from the current export.  This option is Matter-specific. The same email in another Matter may or may not be exported depending if it was already exported for that Matter.
Export Name	Enter a name for the export file.
Export Password	Enter an access password for the export file. The password is required to open the export file after it is downloaded to your computer.
Confirm Password	Enter your export password again to confirm.

6. Click **Export Items**.

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About the Administration Tab

The Administration tab allows your company's administrators to configure settings for your archive and to assign roles. This tab is only available to System Administrators or Role Managers that have access to the Archive Administration console.

Within the Administration Console, your company's administrators can perform the following Discovery Archive tasks:

- Specify Reviewers and assign archives to Reviewers
- Specify archiving options
- View Usage reports and logs

Please refer to the Archive Administration User Guide for more information.

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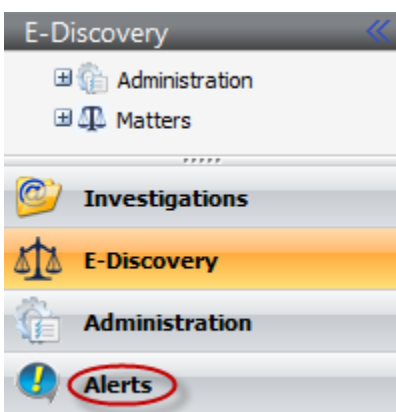
Create Policy Alerts

Alerts are a helpful tool for Administrators and Reviewers, as they help monitor your company's email usage.

You can create an automatic alert that will send you an email notification each time a user sends or receives an email that meets flagged criteria. For example, you can create alerts that flag emails containing profanity in the subject line, message body, or attachment.

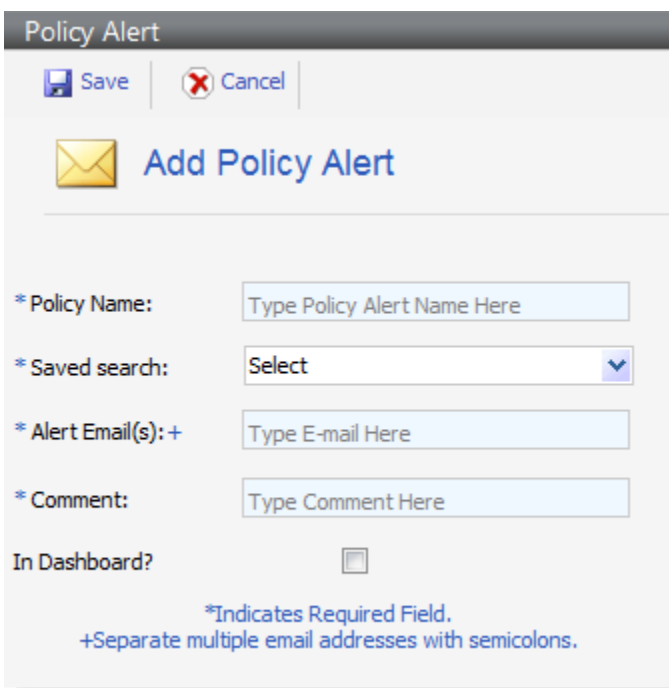
To create an alert

1. Create a Saved Search.
2. Select the Alerts tab.




3. Click .

4. Enter the information for the alert in the Add Policy Alert window.



Refer to the following table for more information:

Policy Name	Enter a name for the new alert.
Saved Search	Click  and select a Saved Search.
Alert Email(s)	Enter your email address.
Comment	Enter comments relating to the alert.
In Dashboard	Select the checkbox if you want the alert to appear in the Administration dashboard.

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Attachment Types Indexed by Discovery Archive

Discovery Archive indexes contents from the following attachment types:

- xls (Microsoft Excel spreadsheet, 2000 - 2003)
- xlsx (Microsoft Excel spreadsheet, 2007 - 2010)
- doc (Microsoft Word document, 2000 - 2003)
- docx (Microsoft Word document, 2007 - 2010)
- pdf (Adobe Acrobat files)
- ppt (Microsoft Powerpoint presentation, 2000 - 2003)
- pptx (Microsoft Powerpoint presentation, 2007 - 2010)
- txt (Text files including CSV, EML and XML files)
- htm (HTML files)
- html (HTML files)
- pps (Microsoft Powerpoint slides)
- zip (ZIP archives)

 Discovery Archive can only index the specified attachments if they are not password-protected or encrypted.

