

## How to use Office 365 e-Discovery (for users).

\*\*\* Only use Internet Explorer to ensure all parts of the process work. \*\*\*

The mailboxes/sites you requested are now available for you to be able to search and export.

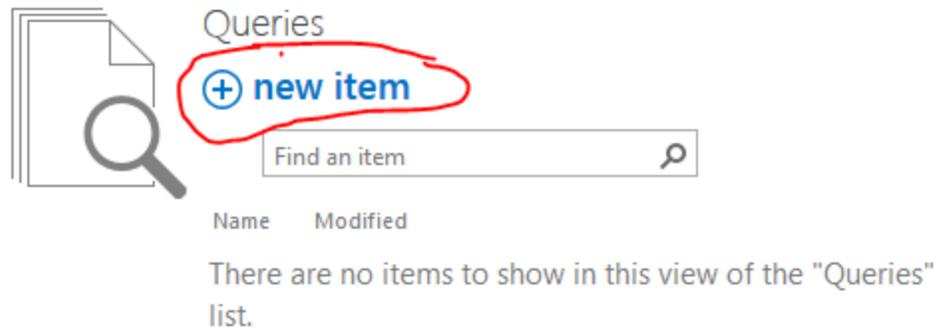
### 1. Log into the e-Discovery site that was provided to you by DII via email

The screenshot shows the Office 365 e-Discovery site interface. The browser address bar displays the URL: <https://vermontgov.sharepoint.com/sites/eDiscovery/Tutorial/default.aspx>. The page title is "Office 365". The main content area is titled "DII - Tutorial Case" and is divided into four sections:

- eDiscovery Sets:** Includes a "new item" button and a search box labeled "Find an item". Below the search box is a table with columns "Name" and "Modified". One item is listed: "Tutorial" with a modified date of "12/10/2015 9:19 AM".
- In-Place Hold Status:** Includes a "new item" button and a search box labeled "Find an item". Below the search box is a table with columns "Name" and "Modified". The table is empty.
- Search and Export:** Includes a "new item" button and a search box labeled "Find an item". Below the search box is a table with columns "Name" and "Modified". The table is empty, with a message below it: "There are no items to show in this view of the 'Queries' list."
- Export Status:** Includes a "new item" button and a search box labeled "Find an item". Below the search box is a table with columns "Name" and "Modified". The table is empty.

### 2. Click "New Item" under "Search and Export"

## Search and Export



3. In the new query, name it appropriately,
  - a. Enter any specific terms you wish to search for. You may specify date ranges, Author/Sender specifics, etc. There are also links on the new query page that will provide tips and rules for searching. The Query box is a text field you can enter key word(s) in to select specific archive content matching the text you entered.
  - b. If you want to return all archived mail, click the "Search" button
  - c. Under "Sources," you will see the mailboxes/sites that you are able to search against. Additionally, you can select specific message types that you may restrict the search to.
  - d. Once you have created your search (you can create and save more than one search), scroll to the bottom of the page and save it if you want to be able to return to the same search at a later day, or if you need to save the search for investigative and discovery purposes.



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# Query: New Item

Name \*  
Tutorial

Query  
Department

Start Date: [ ] End Date: [ ]

Author/Sender:  
Enter names or email addresses...

[Advanced Query Options](#)

[Search syntax and tips](#)

Sources [\(Modify Query Scope\)](#)

Name	Items	Size
Waldo, Steve		

Total:

Exchange | SharePoint

Subject	Recipients	Sender	Date
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### Message Type

Click search to get results and statistics

- Email
- Contacts
- Meetings
- Tasks

4. If you need to Export the mail from your search query to a file, you may do so by clicking the “Export” button under the results section of the page.

Sources [\(Modify Query Scope\)](#)

Name	Items	Size
Bean, Randy	72	5.80 MB
Total:	72	5.80 MB

Exchange SharePoint

Message Type

- Email
- Contacts
- Meetings
- Tasks
- Notes
- Documents
- Journal
- Lync
- [Other Value](#)
- [Clear](#)

Specify Property ▾

About 72 results

Subject	Recipients	Sender	Date
<a href="#">End of the Year Staff Update</a>	ANR	Markowitz, Deb	12/30/2015
<a href="#">VTHR System Outage Update and Instructions</a>	ANR	Markowitz, Deb	12/23/2015
<a href="#">Gov. Shumlin Statement on Rejection of Keysto...</a>	ANR	Markowitz, Deb	11/6/2015
<a href="#">October Staff Update</a>	ANR	Markowitz, Deb	10/26/2015
<a href="#">Thanksgiving Message from Secretary Johnson</a>	ANR	Markowitz, Deb	10/26/2015
<a href="#">REMINDER: ANR Staff Event: Forest Health and...</a>	ANR	Markowitz, Deb	10/1/2015
<a href="#">ANR Staff Event: Cookies and Conversation -- J...</a>	ANR	Markowitz, Deb	9/28/2015
<a href="#">VTSHARES</a>	ANR	Markowitz, Deb	9/16/2015
<a href="#">Retirement Incentive planning and requests for...</a>	ANR	Markowitz, Deb	9/8/2015
<a href="#">RE: Municipal Day is tomorrow!</a>	ANR - National Life	Markowitz, Deb	9/8/2015
<a href="#">Municipal Day is tomorrow!</a>	ANR - National Life	Markowitz, Deb	9/8/2015
<a href="#">National Life EV charging demand info needed</a>	ANR	Markowitz, Deb	8/31/2015
<a href="#">A Day to Care for Creation</a>	ANR	Markowitz, Deb	8/28/2015
<a href="#">Staff Update</a>	ANR	Markowitz, Deb	8/14/2015
<a href="#">Condolences</a>	ANR	Markowitz, Deb	8/10/2015
<a href="#">Leadership Changes</a>	ANR	Markowitz, Deb	7/16/2015
<a href="#">Staff Update!</a>	ANR	Markowitz, Deb	6/22/2015
<a href="#">Today's news</a>	ANR	Markowitz, Deb	6/8/2015
<a href="#">Legislative Session Thanks</a>	ANR	Markowitz, Deb	5/19/2015
<a href="#">welcome new HR Manager Laurie Bouyea-Dum...</a>	ANR	Markowitz, Deb	5/15/2015



5. The Export New Item screen displays:

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## Export: New Item

eDiscovery Sets

- Queries
- Sources
- Exports
- Documents
- Site Contents

### Options

Choose the name and options for the export. Exports include an Electronic Data Reference Model (EDRM) load file.

Name\*

Remove duplicate Exchange content

Include versions for SharePoint documents

Include items that are encrypted or have an unrecognized format

### Estimated Total

The estimated number and size of items do not include versions or deduplication. Selecting those options will affect the total export size.

Number of Items	72
Size of Items	5.80 MB

### Queries

Name	Query
beantest	

6. You may refine your export by choosing to:

- Remove duplicate Exchange content (We suggest removing duplicate Exchange content from the export, which will provide a cleaner final product.)
- include versions for Sharepoint documents
- include items that are encrypted or unrecognized format

If you select one of these options, you must click the "Update Statistics" button

Once the display has refreshed the estimated results, click "OK"

7. To access previously created queries for export, click the "Exports" option on the left side of the screen



Home

# ANR - Randy Bean

- eDiscovery Sets
- Queries
- Sources
- Exports**
- Documents
- Site Contents

## Identify and Hold

eDiscovery Sets

[+ new item](#)

Find an item

Name	Modified
ANR Randy Bean	1/7/2016 9:52 AM

In-Place Hold Status

- 0 Cannot Hold
- 0 Not On Hold
- 0 Processing
- 0 On hold with filter
- 1 On Hold
- 0 Failed

## Search and Export

Queries

[+ new item](#)

Find an item

Name	Modified
rbean	1/8/2016 10:10 AM

Export Status

- 0 Download Not Started
- 1 Download Started
- 0 Download Complete
- 0 Export Failed

From here you may select a previously created query or click on "New Item" to define a new query.

LANDESK Web Desk - Home  
<https://itsupport.vermont.gov/ServiceDes...?id=2e8ea0a9-1b9b-4486-9a30-65f195b279f0>

BROWSE ITEMS LIST



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# Exports

- eDiscovery Sets
- Queries
- Sources
- Exports**
- Documents
- Site Contents

[+ new item](#)

All Items  Find an item

✓ Name	Status	Items	Size (MB)	Modified	Modified By
There are no items to show in this view of the "Exports" list.					

8. Next you will be able to select any queries you have created, or you may create a new one. For this tutorial, we will select the existing query we created earlier. After you've selected it, click the "Next" button.

The screenshot shows the Office 365 Sites interface. The top navigation bar includes the Office 365 logo and the word "Sites". Below this is a ribbon with tabs for "BROWSE", "VIEW", "PAGE", "ITEMS", and "LIST". The "ITEMS" tab is active, and the "LIST" sub-tab is selected. The ribbon contains two groups of actions: "Manage" and "Actions".

The "Manage" group includes: Edit Item, Edit Series, Version History, Shared With, and Delete Item.

The "Actions" group includes: Check In, Check Out, Open, Alert Me, Approve/Reject, Manage Copies, Workflow, Claim Release, and Distribution.

Below the ribbon, the main content area is divided into two sections. On the left is a navigation menu with the following items: eDiscovery Sets, Queries, Sources, Exports, Documents, and Site Contents. On the right is the "Select Queries" section, which contains the text "Select the queries you'd like to export." and a link to "new item or edit this list". Below this is a table of queries:

✓	Name	Modified
✓	Tutorial ✱	12/10/2015 10:12 AM

9. Next, you will be able to set some criteria for the export. We suggest removing duplicate Exchange content from the export, which will provide a cleaner final product.

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## Export: New Item

eDiscovery Sets

Queries

Sources

Exports

Documents

Site Contents

### Options

Choose the name and options for the export. Exports include an Electronic Data Reference Model (EDRM) load file.

Name\*

Tutorial

Remove duplicate Exchange content

Include versions for SharePoint documents

Include items that are encrypted or have an unrecognized format

### Estimated Total

The estimated number and size of items do not include versions or deduplication. Selecting those options will affect the total export size.

Number of Items 13309

Size of Items 1.60 GB

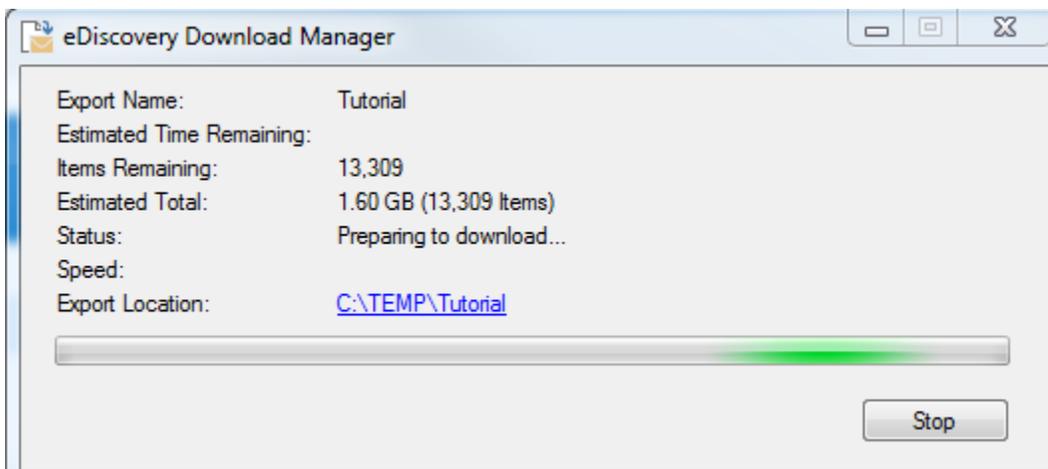
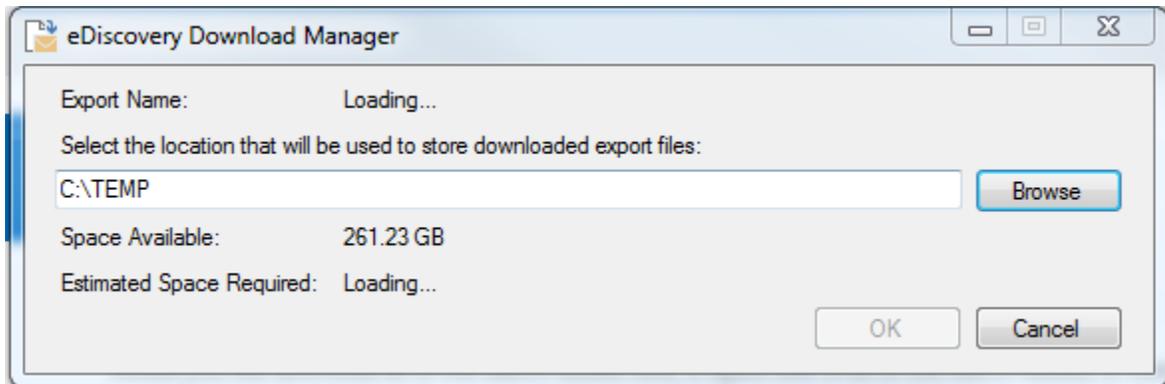
### Queries

Name	Query
Tutorial	Department

Update Statistics OK Cancel

10. When you go to download the results, you will be prompted to install the e-Discovery download manager. **FYI - this only works in Internet Explorer.** You may need a DII tech to assist if you don't have enough permission to do this. It will then prompt you to save the results at a local location,

follow the prompts then press OK. Once it is finished downloading, you will find, in the location you selected to save the files in, a folder with all of the files related to the export. If you exported email from a search query, there will be a PST file that contains the email.



11. Part of the beauty of the Office 365 e-Discovery suite is that you can run an entire investigation from the ediscovery case site that DII has created for you. If you have pertinent documents related to the case, you can keep them all in the documents location of the case.