



**Search and Discovery Usage  
and Practices**


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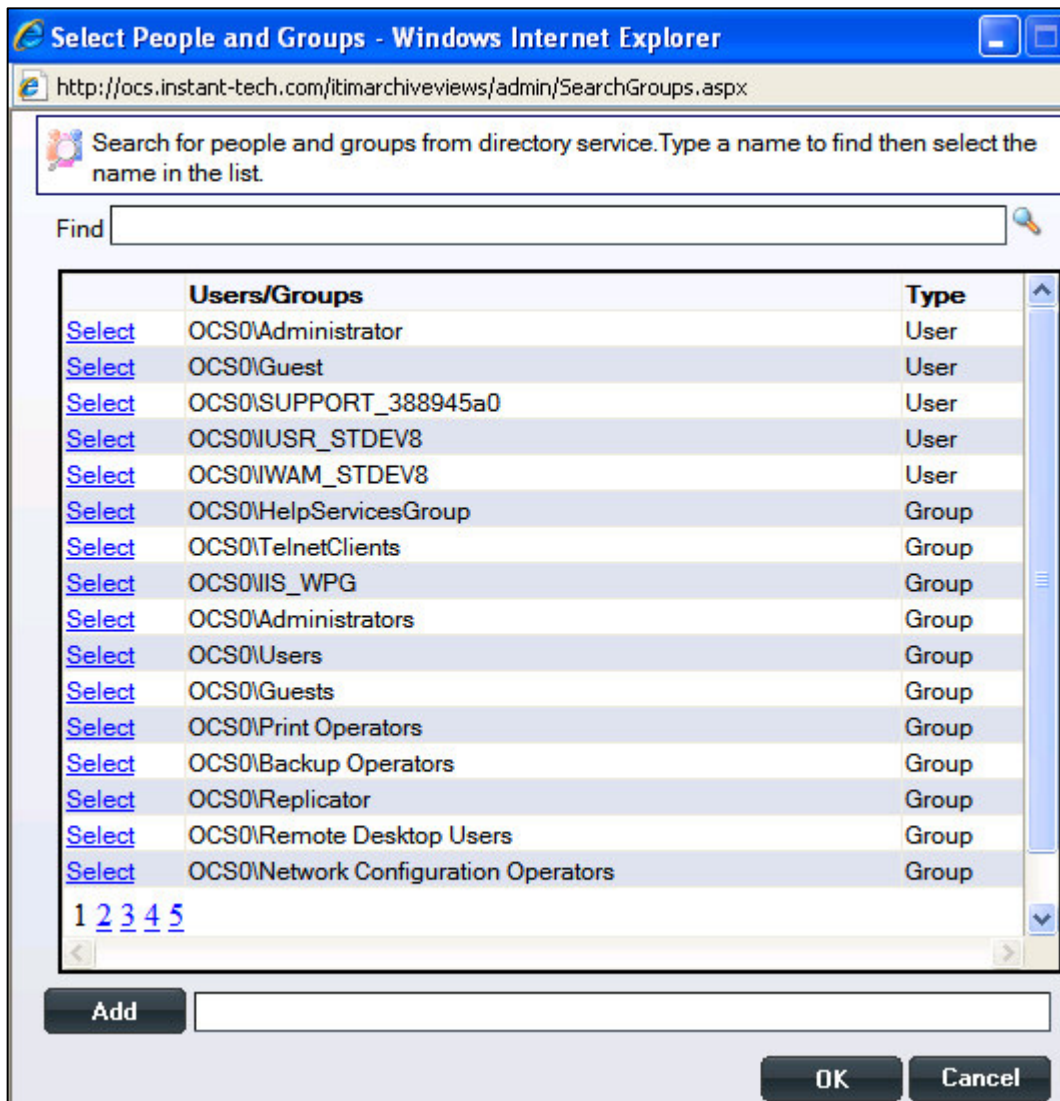
## Search and Discovery:

Search and Discovery was built and designed for compliance and fast, accurate searching for internal and external users and their chat conversations within one's organization. One can search all users, between users and/or key words with any combination there of.

## Provisioning Search and Discovery:

To secure the Search and Discovery page for select group(s) or user(s).

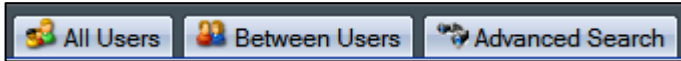
1. Click **Add Groups or Users** button and select the magnifying glass 
2. A pop-up window will appear to select and add the group or user to give access to.



3. Commit changes and browse the following address:

<http://iis server/itimarchiveviews/extendedsearch/index.aspx>

4. Select the All Users tab, Between Users tab or Advanced Search to start your searches



## Discovery Searching:

### General Usage Example:


Retrieve chat history for entire network that has said the word “Microsoft” to Joe Smith.

Step 1. Ensure you have been given the appropriate permissions in the Admin page for Discovery. See **“Provisioning Search and Discovery”**

Step 2. Enter: <http://IIS server name/itimarchiveviews/discovery/index.aspx> in your browser.

Step 3. Go to “All users” tab because we are checking chats between all users and Joe Smith.



Step 4. Find Joe Smith simply by clicking the  icon to the right of the text box . A pop-up window will appear.

Step 5. Choose LCSlog or Active Directory.


A light blue rectangular window titled 'User searching'. It contains two radio buttons: 'Active directory' (which is selected) and 'LcsLog database'. Below the radio buttons is a text input field labeled 'Find:' followed by a magnifying glass icon.

Step 6. Click the magnifying glass and/or type in the first few letters of Joe Smith’s sip uri and add it to the list.

You may also select the AD group he is a member of. If you have a very large list of users to search on, you can prepare a list of users’ Sip Uris with a semi-colon as a delimiter in notepad and paste it into the user window. Also Note: For faster results, narrow your search to a shorter time frame.”

## Locating external/federated users or deleted users:

Archive viewer will search external, federated or even users that have been deleted from your Active Directory. Follow the steps below for configuration:

1. Click the magnifying glass 
2. Choose "LCS log" radio button

User searching

Active directory

LcsLog database

3. These users will now appear and become searchable in the selection window

## All Users tab explained:





Search ONE or more users for a one key word in conversation history. It is a search between the chosen users and ALL OTHER USERS involved.

Example:

I would like to know if Jane Brown ever said the word "ugly" to anyone in the organization between January and March of 2007.

**Provide your search criteria below**

 With user or users:  

 Text to locate:

Between (mm/dd/yy):  and

### Between Users tab explained:



Search TWO or more users for one key word in conversation history. It is a search between the chosen users and OTHER CHOSEN USERS INVOLVED IN CHAT CONVERSATIONS (more than two users will search multi party chat conversations).

Example:

I would like to know, if the word “ugly” had been said between John Smith and Jane Brown.

A screenshot of a search criteria form titled 'Provide your search criteria below'. It contains three input fields: 'With user or users:' with the value 'jbrown@mydomain.com;jsmith@mydomain.com', 'Text to locate:' with the value 'ugly', and 'Between (mm/dd/yy):' with values '01/01/2007' and '03/01/2007'. At the bottom are three buttons: 'Search', 'Save Query', and 'Export'.

### Advanced Search tab explained:



A boolean search for complexed searching. It is the only tab in Discovery, where operators such as: AND, OR, NOT, etc., and more than one keyword can be used.

### Examples of Boolean Searching:

1. Query: I am looking for chats about war from John Smith or Jane Brown.

Boolean logic: **OR**

Users: jsmith@mydomain.com OR jbrown@mydomain.com

Keyword search: %war% or %military%


A screenshot of a search criteria form titled 'Provide your search criteria below'. It contains three input fields: 'Users:' with the value 'jbrown@mydomain.com OR jsmith@mydomain.com', 'Text to locate:' with the value '%war% or %military%', and 'Between (mm/dd/yy):' with values '01/01/2007' and '11/10/2009'. At the bottom are three buttons: 'Search', 'Save Query', and 'Export'.





**2. Query: I am looking for chats about computers and printers from John Smith and Jane Brown.**


Boolean logic: **AND**



Users: jsmith@mydomain.com AND jbrown@mydomain.com

Keyword search: %computers% and %painting%

Provide your search criteria below 

 Users:    

 Text to locate:


Between (mm/dd/yy):   and  





**3. Query: I'm looking for chats about the office, but not Microsoft Office from John Smith but not Jane Brown.**


Boolean logic: **NOT**



Users: jsmith@mydomain.com NOT jbrown@mydomain.com

Keyword search: %office% not %Microsoft

Provide your search criteria below 

 Users:    

 Text to locate:

Between (mm/dd/yy):   and  

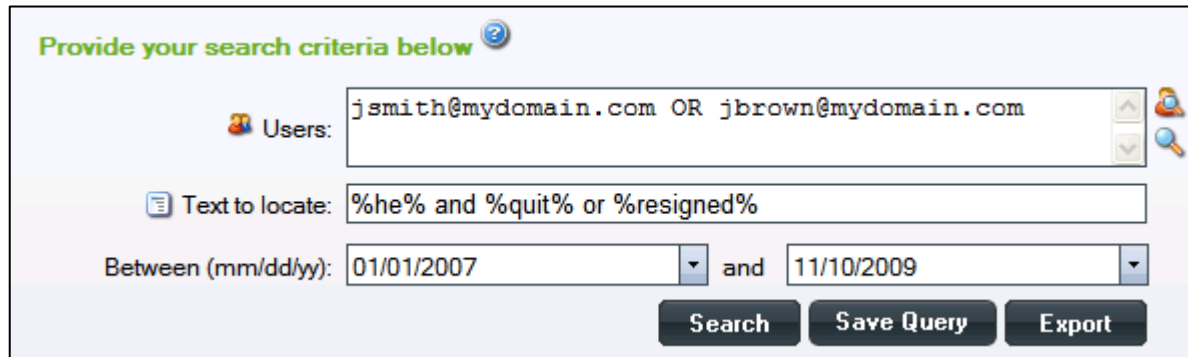
#### 4.I want to know if Joe Smith or Jane Brown said “He Quit”.

Searching for “He” and “Quit” may not return the exact results needed. You may want to add “resigned” too.

Boolean logic: **AND, OR**

Users: jsmith@mydomain.com OR jbrown@mydomain.com

Keyword search: %he% and %quit% or %resigned%




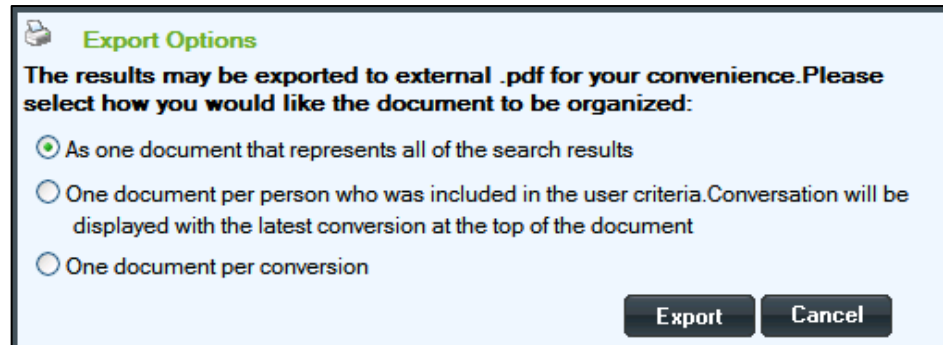
The screenshot shows a search interface with the following fields and buttons:

- Provide your search criteria below** (with a help icon)
- Users:** A text input field containing "jsmith@mydomain.com OR jbrown@mydomain.com" with a search icon on the right.
- Text to locate:** A text input field containing "%he% and %quit% or %resigned%".
- Between (mm/dd/yy):** Two date input fields containing "01/01/2007" and "11/10/2009" with a dropdown arrow between them.
- Buttons:** "Search", "Save Query", and "Export".

#### PDF Export:

After you’ve received the desired results from your query. You may export them to a .PDF file.

1. Click on the Export button 
2. Choose the option that works best for your task.
3. Click Export again and Save the file to desired directory.

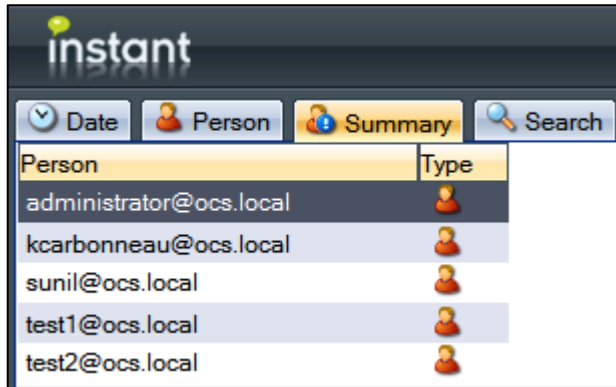


The screenshot shows the "Export Options" dialog box with the following content:

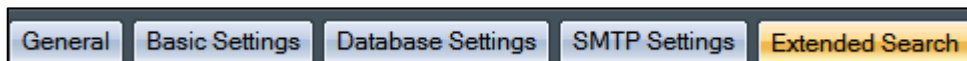
- Export Options** (with a printer icon)
- The results may be exported to external .pdf for your convenience. Please select how you would like the document to be organized:**
- As one document that represents all of the search results
- One document per person who was included in the user criteria. Conversation will be displayed with the latest conversion at the top of the document
- One document per conversion
- Buttons:** "Export" and "Cancel".

## Extended Search:

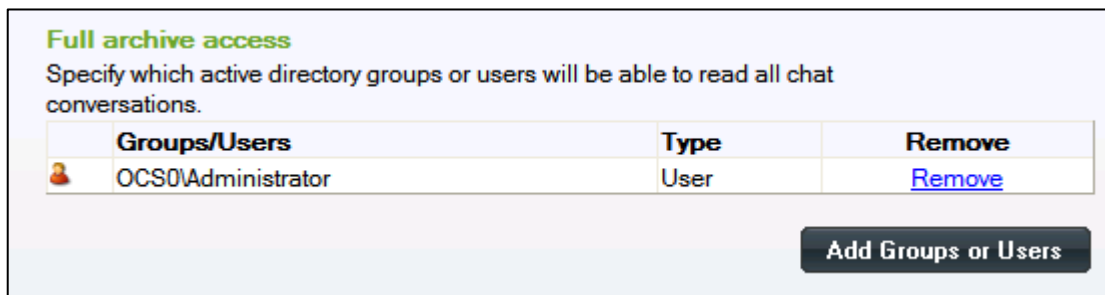
Extended Search can be useful for “free form” searching. It allows for total chat history viewing of all members or department members of one’s organization. Extended search allows for browsing chats categorically by date, person or conveniently roled up into a summary view. See below:



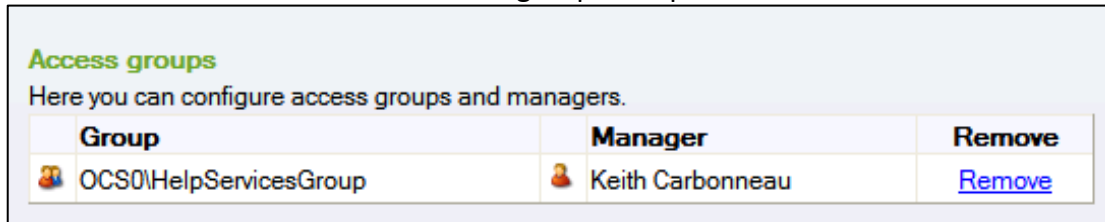
## Provisioning for Full archive access and Access groups:



Configuration for full archive access groups are shown here from the ...itimarchiveviews/admin/index.aspx:



Extended search can be configured for different departments or “departmental searching”. One may give managerial rights to a user of a department or group. By doing so, managers can browse chats of members in their own group or department. Shown here:



To view chat history in the Extended search page within the Archive Viewer website enter the following in your browser:

<http://iis server/itimarchiveviews/extendedsearch/index.aspx>