



Instant Solution Brief:

Role-based OCS Archive Search and Discovery

Introduction

Instant Archive Viewer for Microsoft OCS 2007 is a major update that includes numerous advanced features beyond those found in the version for Microsoft LCS.

A critical (and common) request from our customers, partners, and prospects centered on role-based archive search and discovery.

As a result, Instant Archive Viewer for OCS 2007 offers three distinct viewing and retrieval modes:

1. End user search and retrieval
2. Departmental (ie, manager-level) search and retrieval
3. Enterprise (ie, organization-wide) search and discovery

Features Common to All Roles

Each of the roles listed above has its own unique features (described on the following pages); but they all share these common features:

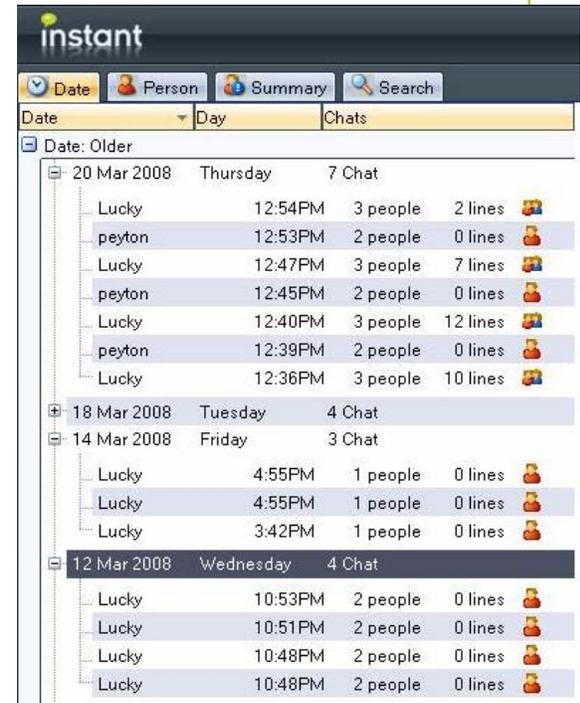
- ◆ Access is secured via various authentication mechanisms, including Windows pass-through authentication
- ◆ Simple 1-to-1 conversations can be searched/retrieved/audited
- ◆ Multi-party conversations can be search/retrieved/audited
- ◆ Conversations and search results can be exported to PDF
- ◆ No software is installed on the client
- ◆ The UI is an easy-to-use, web-based interface

Features Unique to Each Role

End User Search and Retrieval

This role gives end users access to their own past conversations without intervention from the help desk.

- ◆ The web-based interface is tightly integrated within the Office Communicator client (it sits in the client as a tab extension that is deployed via a simple regedit)
- ◆ Users can quickly and intuitively search by date, by person, or conduct advanced keyword searches
- ◆ Users only have access to their own conversations



Departmental Search and Retrieval

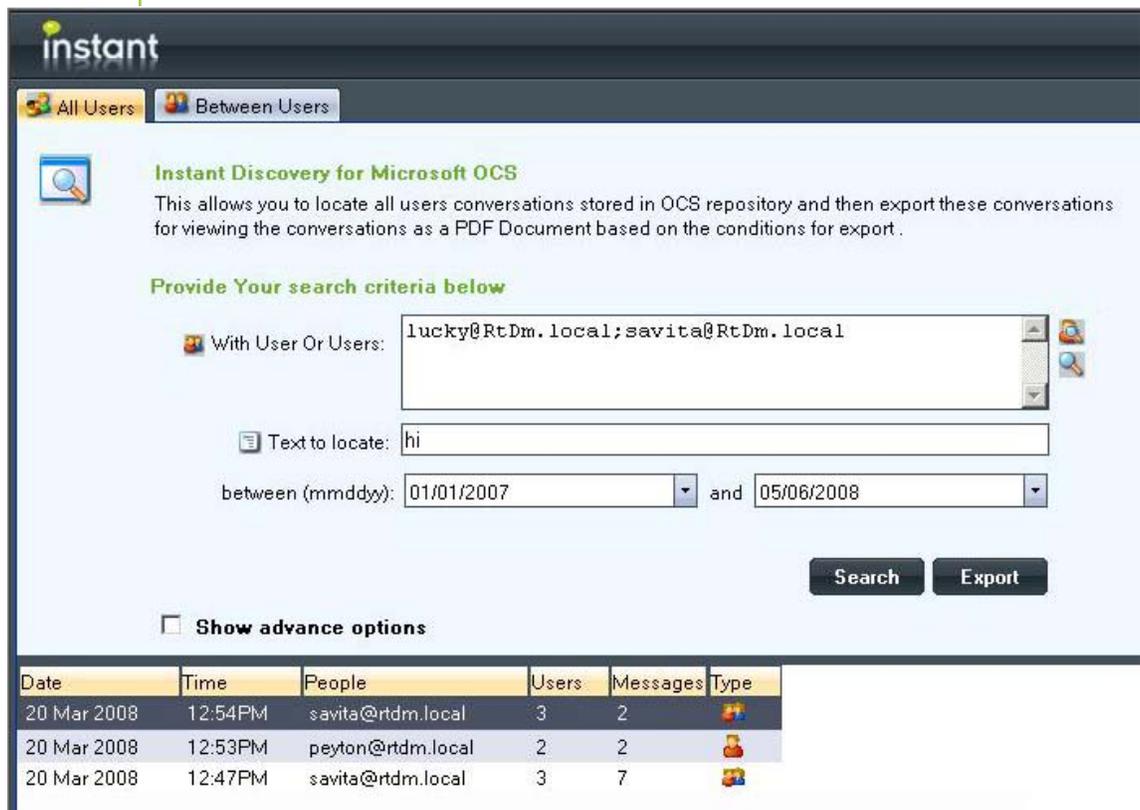
This role gives managers the ability to monitor the conversations of employees in their respective departments.

- ◆ Managers can search conversations within an entire AD group
- ◆ Security controls restrict managers' access to the conversations from within their group or groups
- ◆ The user interface can be quickly integrated with the Communicator client

Enterprise Search and Discovery

This role consists of a powerful search and discovery module that enables a user with 'super admin' privileges to conduct organization-wide audits of all conversations by all users in the environment.

- ◆ Locate conversations between users, both 1-to-1 and multi-party
- ◆ Locate specific text within conversations
- ◆ Locate conversations by phrase and by user
- ◆ Perform complex searches, including advanced Boolean searches
- ◆ Save custom queries for reuse within defined discovery projects
- ◆ Create and manage discovery-based projects that consist of collections of related queries



The screenshot shows the 'Instant Discovery for Microsoft OCS' web interface. At the top, there are tabs for 'All Users' and 'Between Users'. Below the tabs, a search criteria form is displayed. The form includes a search icon, a title 'Instant Discovery for Microsoft OCS', and a description: 'This allows you to locate all users conversations stored in OCS repository and then export these conversations for viewing the conversations as a PDF Document based on the conditions for export.' The form prompts the user to 'Provide Your search criteria below' and includes the following fields:

- With User Or Users:** lucky@RtDm.local;savita@RtDm.local
- Text to locate:** hi
- between (mmddyy):** 01/01/2007 and 05/06/2008

Buttons for 'Search' and 'Export' are located at the bottom right of the form. Below the form, there is a checkbox for 'Show advance options'. At the bottom of the interface, a table displays search results:

Date	Time	People	Users	Messages	Type
20 Mar 2008	12:54PM	savita@rtdm.local	3	2	
20 Mar 2008	12:53PM	peyton@rtdm.local	2	2	
20 Mar 2008	12:47PM	savita@rtdm.local	3	7	

About Instant Technologies

Instant Technologies specializes in developing innovative, enterprise-class compliance and productivity solutions for IBM Lotus Sametime and Microsoft Office Communications Server, including IM archiving, IM queue management, persistent chat rooms, IM bot development, buddy list administration, and more. Instant Technologies is a Lotus Advanced Business Partner and a Microsoft Registered Partner headquartered in Durham, NH.