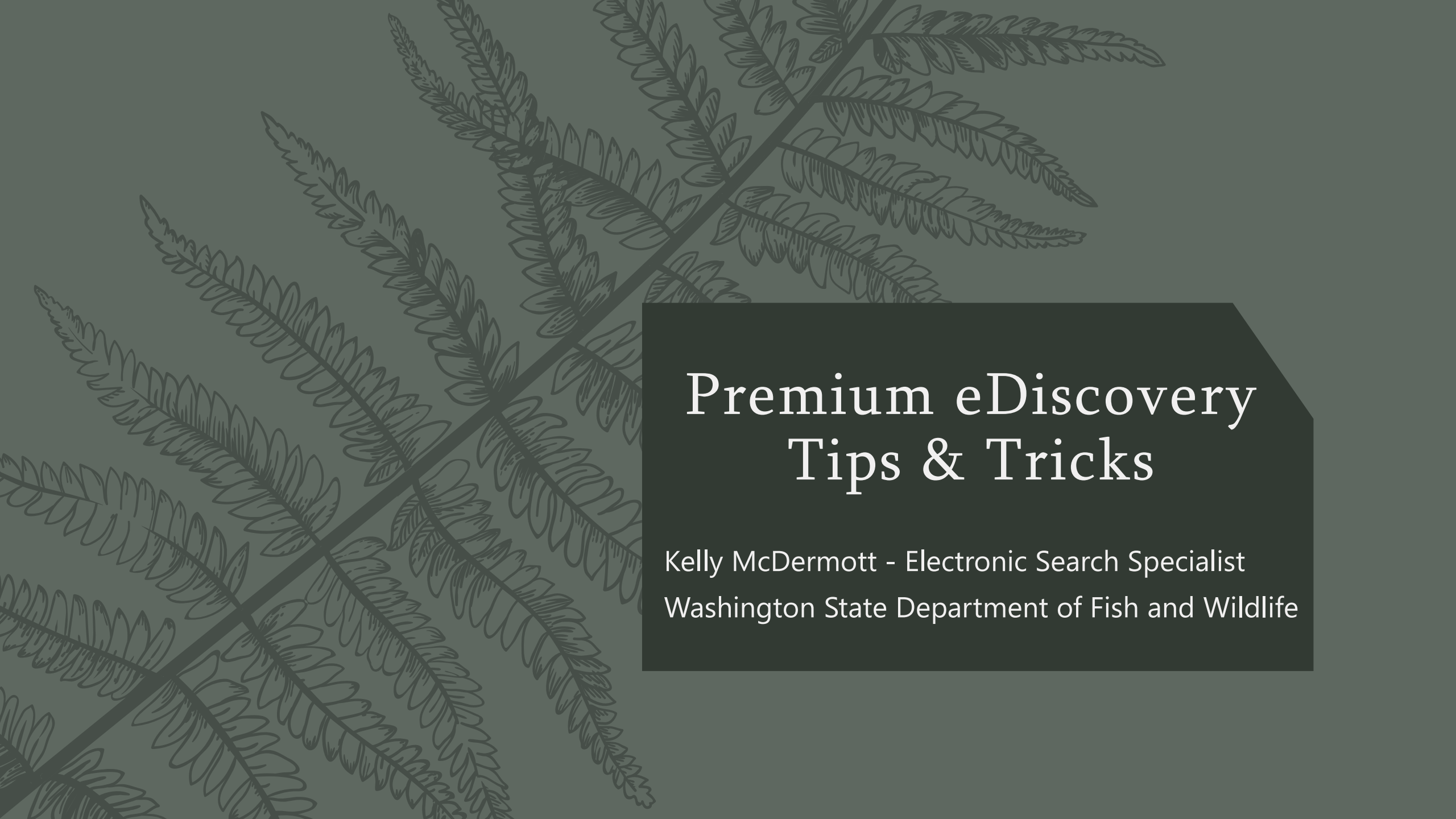




Premium eDiscovery Tips & Tricks

Kelly McDermott - Electronic Search Specialist
Washington State Department of Fish and Wildlife



Introduction



O365 Premium eDiscovery and Standard eDiscovery Pros and Cons

Capability	Content search	eDiscovery (Standard)	eDiscovery (Premium)
Search for content	✓	✓	✓
Keyword queries and search conditions	✓	✓	✓
Search statistics	✓	✓	✓
Export search results	✓	✓	✓
Role-based permissions	✓	✓	✓
Case management		✓	✓
Place content locations on legal hold		✓	✓
Custodian management			✓
Legal hold notifications			✓
Advanced indexing			✓
Error remediation			✓
Review sets			✓
Support for cloud attachments and SharePoint versions			✓
Optical character recognition			✓
Conversation threading			✓
Collection statistics and reports			✓
Review set filtering			✓
Tagging			✓
Analytics			✓
Predictive coding models			✓
Computed document metadata			✓
Transparency of long-running jobs			✓
Export to customer-owned Azure Storage location			✓

Core eDiscovery workflow

1



Create
eDiscovery
holds

2



Search for
content

3



Export and
download
search results

Advanced eDiscovery workflow

1



Add custodians
to a case

2



Collect relevant
content from
data sources

3



Commit
collection to a
review set

4



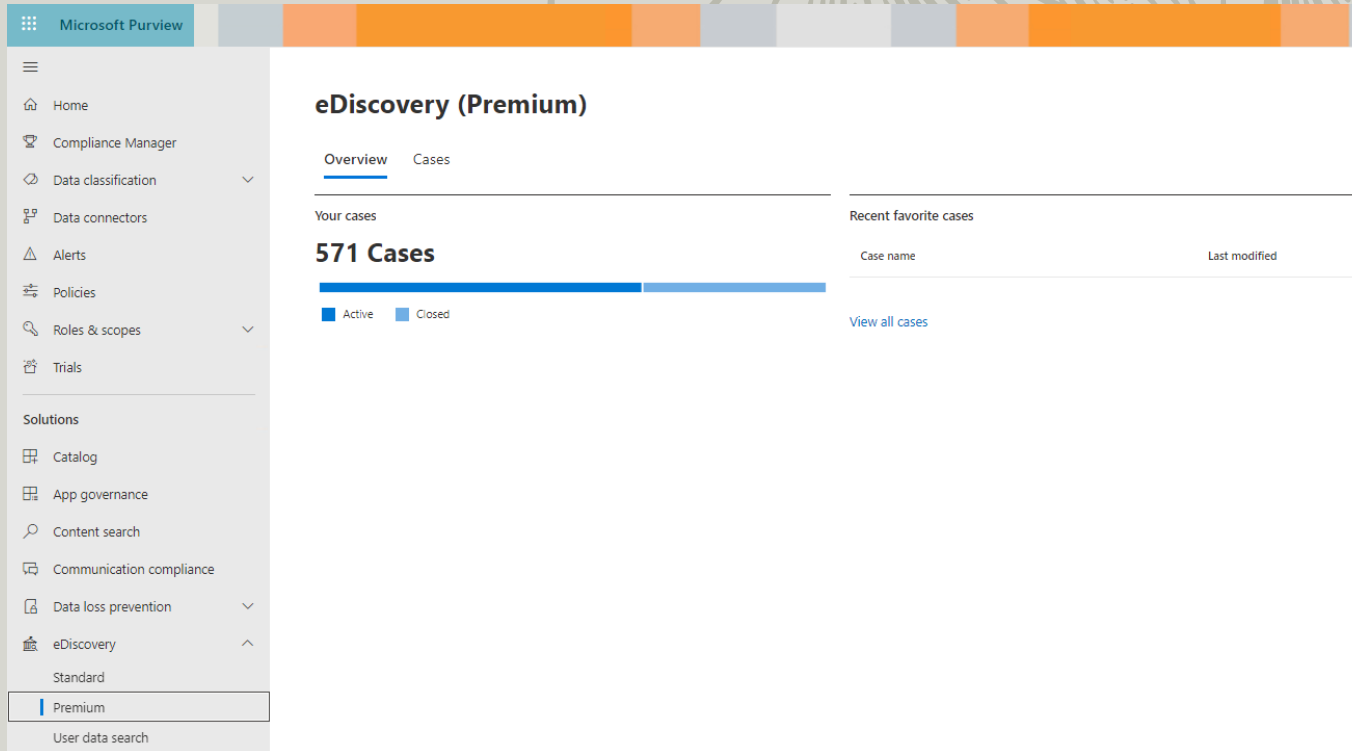
Review and
analyze data in
a review set

5

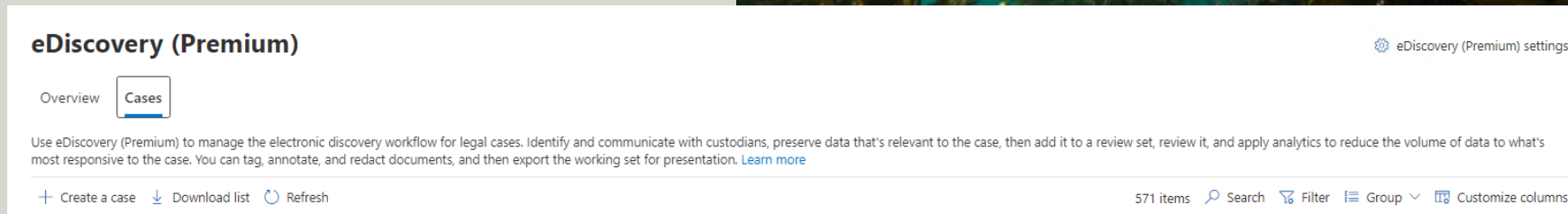
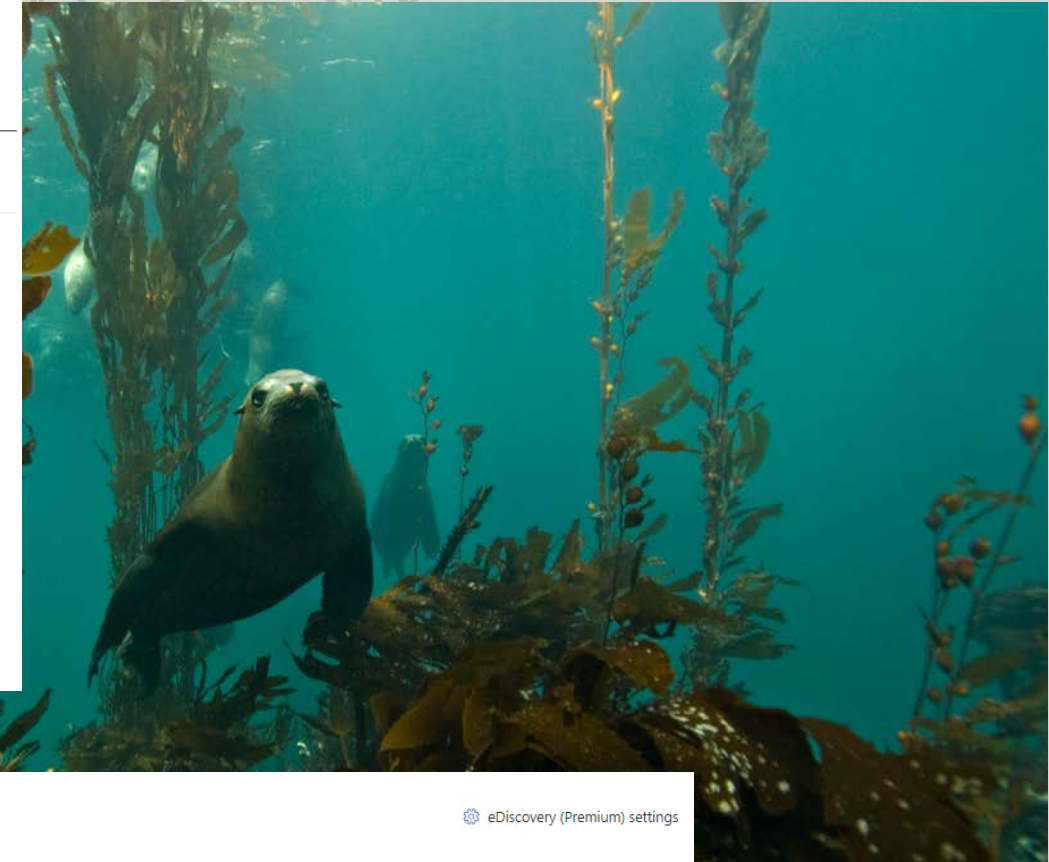


Export and
download case
data

Setting Up Cases In Premium O365 eDiscovery



The screenshot shows the Microsoft Purview eDiscovery (Premium) interface. On the left is a navigation pane with options like Home, Compliance Manager, Data classification, Data connectors, Alerts, Policies, Roles & scopes, Trials, and Solutions. The 'Premium' option is selected under Solutions. The main content area is titled 'eDiscovery (Premium)' and has two tabs: 'Overview' and 'Cases'. The 'Cases' tab is active, showing 'Your cases' with a bar chart indicating 571 cases. A legend shows 'Active' (dark blue) and 'Closed' (light blue) cases. To the right, there's a section for 'Recent favorite cases' with columns for 'Case name' and 'Last modified', and a 'View all cases' link.



The screenshot shows the 'Cases' tab of the eDiscovery (Premium) interface. It includes a title 'eDiscovery (Premium)' and a link to 'eDiscovery (Premium) settings'. Below the title are two tabs: 'Overview' and 'Cases', with 'Cases' being the active tab. A paragraph describes the use of eDiscovery (Premium) for managing electronic discovery workflows. At the bottom, there are action buttons: '+ Create a case', 'Download list', and 'Refresh'. On the right side, there are statistics and filters: '571 items', 'Search', 'Filter', 'Group', and 'Customize columns'.

Setting Up Cases In Premium O365 eDiscovery

Advanced eDiscovery > New case

Name and description

Members and settings

Summary

Name your case

Provide basic information about this case and choose a case format

Name *

Description

Help others understand this case with a short overview.

Number

Enter a docket number or another numeric identifier.

Case format

☒ New (recommended)

- Improved performance and more durable data pipeline
- Increased collection, review set, and export limits
- Teams conversations collected as HTML transcript files (no support for .msg and .pdf formats)

[Learn more about the new case format](#)

☐ Classic (This format will be deprecated soon)

Advanced eDiscovery > New case

Name and description

Members and settings

Summary

Team members

Users

Groups

Search and analytics

☒ Reduce duplicates and link email threads

Similarity threshold (%)

65

Minimum word count

10

Maximum word count

500000

☐ Group items by theme

☒ Create a saved query whenever analytics is performed

Text to ignore ()

Actual text or regular expression *

Apply to

Select modules

☐ Case sensitive

+ Add

Optical character recognition (OCR)

☐ Find text in images during advanced indexing

Back

Next

Cancel

5

Setting Up Cases In Premium O365 eDiscovery

Advanced eDiscovery > New case

✓ Name and description

✓ Members and settings

● Summary

Review your case

Name and description 

Name
DFW_Test

Case format
Advanced new

Members and settings 

Member permissions
None

Role group permissions
None

Near duplicates/email threading
true

Similarity threshold
65%

Range
10 to 500000 words

Themes enabled
false

Create a saved query whenever analytics is performed
true

Ignore text (0)
None

Find text in images during advanced indexing
false

Back

Submit

eDiscovery (Premium) > Cases > DFW_AssessmentCase

Overview

Data sources

Collections

Review sets

Communications

Hold

Processing

Exports

Jobs

Settings

Case format

This case is in the new case format
Compared to cases in the classic format, this case supports more items and larger review sets.
[Compare case format limits](#)

Custodian

0 Total custodians
0 Total custodians on hold

Communication summary

0 Notices sent
0 Notices Acknowledged

Recent jobs

Type	Status	Created
Add items to review set	Successful	Apr 12, 2023 4:12 PM
Prepare search preview and estimates	Successful	Apr 11, 2023 5:16 PM
Tag items	Successful	Aug 15, 2023 10:17 AM
Packaging export data	Successful	Jul 13, 2023 9:53 AM
Prepare for export	Successful	Jul 13, 2023 9:53 AM
Packaging export data	Successful	Jul 13, 2023 8:51 AM

Creating a Collection



Data Sources

Overview **Data sources** Collections Review sets Communications Hold

Start your case by setting up people as custodians to quickly identify and preserve data sources with w

Add data source ▾ Refresh Manage Retry hold action

Custodians

Add new custodians

Import custodians

Data Locations

Add data locations

New custodian

● Identify custodian

○ Hold settings

○ Review

Select custodian

Identify new custodians from your organization's active directory

mcdermott, kel

Suggested users

McDermott, Kelly BO...
kelly.mcdermott.box@dfw...

McDermott, Kelly E (...
Kelly.McDermott@dfw.w...

McDermott, Kelly E ...
Kelly.McDermott.adm...

Clear

Edit

● Identify custodian

○ Hold settings

○ Review

Select custodian

Identify new custodians from your organization's active directory

McDermott, Kelly E O365 Admin Please type minimum 3 characters to get the mailbox list.

Expand each custodian to view and add locations.

▼ Custodian	Count	Clear	Edit
▼ McDermott, Kelly E O365 Admin			
Mailboxes	1/1 (Default)	Clear	Edit
OneDrives	1/1 (Default)	Clear	Edit
Exchange	0		Edit
SharePoint	0		Edit
Teams	0		Edit
Yammer	0		Edit

Edit assigned Teams locations

Search for specific teams location

2 selected



name



DFW-Team ITS Mobile Device Service (Site)



DFW-Team ITS Mobile Device Service (Mailbox)

Data Sources

New custodian

- ☒ Identify custodian
- ☒ **Hold settings**
- ☐ Review

Hold settings

Choose which of your new custodians to place on hold.

Name	☒ Hold
 McDermott, Kelly E O365 Ad...	☒

- ☒ Identify custodian
- ☒ Hold settings
- ☒ **Review**

Review your custodians

The following users and associated data locations will be added to your list of custodians for this case

☐ Custodian	Count	OnHold
☒ McDermott, Kelly E O365 Admin		
 Mailboxes	1	false
 OneDrives	1	false
 Exchange		
 SharePoint		
 Teams		
 Yammer		

Back

Submit

Cancel

Data Sources

Import custodians

- ☒ Get template
- ☐ Upload CSV file
- ☐ Import

Get the import template

Use the provided CSV file as a template for the file to import. You can open it using Microsoft Excel or a similar app.[Get detailed preparation guidance](#)
[Download the CSV template](#)

	A	B	C	D	E	F	G	H	I	J	K
1	Custodian contactEmail	Exchange Enabled	OneDrive Enabled	Is OnHold	Workload1 Type	Workload1 Location	Workload2 Type	Workload2 Location	Workload3 Type	Workload3 Location	
2											
3											

Import custodians

- ☒ Get template
- ☒ Upload CSV file
- ☐ Import

Prepare and upload file

Use the CSV template to list up to 1,000 custodians. You can specify multiple data source locations for each custodian.

To avoid common errors during import:

- Use a unique work email address (Azure Active Directory UPN) for each custodian.
- Specify up to 1000 additional data sources per custodian using the columns Workload1 Type, Workload1 Location, Workload2 Type, Workload2 Location, and so on.
- Use only the following data source types: ExchangeMailbox, SharePointSite, TeamsMailbox, and YammerMailbox.
- When adding an inactive mailbox, add a period at the beginning of the email address: john@example.com.

 Upload csv file

Next

Back

Next

Cancel

Data Sources

Import custodians

☒ Get template

☒ Upload CSV file

☐ Import

Prepare and upload file

Use the CSV template to list up to 1,000 custodians. You can specify multiple data source locations for each custodian.

To avoid common errors during import:

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- Use only the following data source types: ExchangeMailbox, SharePointSite, TeamsMailbox, and YammerMailbox.
- When adding an inactive mailbox, add a period at the beginning of the email address: john@example.com.

[Upload csv file](#)

Uploaded CSV file: [ImportCustodian.csv](#) 

[Back](#)

[Next](#)

Import custodians

☒ Get template

☒ Upload CSV file

☒ Import

Ready to import

Your import file has passed initial checks. During the import process, we will:

1. Add all valid custodians and data sources.
2. Perform advanced indexing on all data sources, except those you have chosen to skip for indexing.
3. Place data sources on hold as specified in the import file.

File to import:

ImportCustodian.csv

[Back](#)

[Import](#)

[Cancel](#)

Data Sources

Import custodians

- Get template
- Upload CSV file
- Import

✓ **Done**

Your import has started
It can take several minutes to add and validate all custodians.

Done



eDiscovery (Premium) > Cases > DFW_VersionTest



Overview **Data sources** Collections Review sets Communications Hold Processing Exports Jobs Settings

Start your case by setting up people as custodians to quickly identify and preserve data sources with which they are associated. [Learn more](#)

Add data source Refresh Manage Retry hold action

1 of 3 selected Search Filter Group Customize columns

☐	Name	Source type	Status	Hold	Indexing job status	Index date
☐	Young, Kelly A (DFW)	Custodian	✓ Active	False	InProgress	Oct 10, 2023 2:39 PM
☒	Street, Keri (DFW)	Custodian	✓ Active	False	Successful	Aug 23, 2023 8:55 AM
☐	McDermott, Kelly E (DFW)	Custodian	✓ Active	False	Successful	Aug 23, 2023 8:55 AM

Collections



Collections

Overview Data sources **Collections** Review sets Communications Hold Processing Exports Jobs Settings

 New collection  Refresh

2 items  Search  Filter  Group   Customize columns

New collection

☒ Name and description

☐ Custodial data sources

☐ Non-custodial data sources

☐ Additional locations

☐ Search query

☐ Review your collection

Name and description

To create new collection, you will need to name the collection, identity the collection scope, and search conditions. Collections are unique searches that will constitute this review set.

Name

Description

Next

Save and close

Cancel

Collections

New collection

- ☒ Name and description
- ☒ **Custodial data sources**
- ☐ Non-custodial data sources
- ☐ Additional locations
- ☐ Search query
- ☐ Review your collection

Choose custodial data sources

These are the people whose content you want to search to gather evidence for this case. More custodians can be added later. You can also choose what locations you'd like to make available to search.

+ Select custodians

Select all

Name	Email	Select all	Custodian's mail...	Custodian's OneDrive	Additional mailboxes	Additional sit
------	-------	------------	---------------------	----------------------	----------------------	----------------

New collection

- ☒ Name and description
- ☒ **Custodial data sources**
- ☐ Non-custodial data sources
- ☐ Additional locations
- ☐ Search query
- ☐ Review your collection

Choose custodial data sources

These are the people whose content you want to search to gather evidence for this case. More custodians can be added later. You can also choose what locations you'd like to make available to search.

+ Select custodians

Select all

Name	Email	Select all	Custodian's mail...	Custodian's OneDrive	Additional mailboxes
------	-------	------------	---------------------	----------------------	----------------------

Select custodians

You can apply this collection to users already designated as custodians for this case. You can add new custodians in the Data Sources section of this case.

Search for specific custodians

1 selected

Name	Email
☒ Young, Kelly A (DFW)	kelly.young@dfw.wa.gov
Street, Keri (DFW)	Keri.Street@dfw.wa.gov
McDermott, Kelly E (DFW)	Kelly.McDermott@dfw.wa.gov

Back Next

Back Next

Add Cancel

Collections

New collection

- ☒ Name and description
- ☒ **Custodial data sources**
- ☐ Non-custodial data sources
- ☐ Additional locations
- ☐ Search query
- ☐ Review your collection

Choose custodial data sources

These are the people whose content you want to search to gather evidence for this case. More custodians can be added later. You can also choose what locations you'd like to make available to search.

		Select all				
+ Select custodians		☐				
Name	Email	Select all	Custodian's mail...	Custodian's OneDrive	Additional mailboxes	Additional sit
 Young, Kelly A (...)	kelly.young@dfw.wa.gov	☒	☒	☒	None	None

New collection

- ☒ Name and description
- ☒ Custodial data sources
- ☒ **Non-custodial data sources**
- ☐ Additional locations
- ☐ Search query
- ☐ Review your collection

Choose non-custodial data sources

These are the sites, groups, and other sources that you want to search but aren't associated with the custodians in this case. More non-custodial sources can be added later from the 'Data sources' section of this case.

		Select all	
+ Select non-custodial sources		☐	
		0 items	
Location	Date indexed		
		No data available	

[Back](#)[Next](#)[Back](#)[Next](#)[Save and close](#)[Cancel](#)

Collections

New collection

- ✓ Name and description
- ✓ Custodial data sources
- ✓ Non-custodial data sources
- **Additional locations**
- Search query
- Review your collection

Additional locations

Choose additional locations to search. An additional location is a data source that isn't associated with the custodians you selected on the previous page. Note: these additional locations will not include advanced indexing unless they are added as data sources in the case, [learn more in this article](#).

ⓘ Location limit: Partially indexed items cannot be collected from additional locations. Additional locations don't include advanced indexing either.

Status	Location	Included	Excluded
☒ On	Exchange mailboxes Microsoft 365 Groups Teams Yammer user messages	All Choose users, groups, or teams	None
☒ On	SharePoint sites OneDrive sites Microsoft 365 Group Sites Team Sites Yammer Networks	All Choose sites	None
☐ Off	Exchange public folders		

Additional search options

ⓘ These options have been set as default by your eDiscovery admin. However, requirements of your collection by selecting preferred options.

Locations

Search additional locations during tenant-wide searches. Note: including locations is not required for a complete search.

- ☒ Guest mailboxes
- ☒ Shared Teams channels

New collection

- ✓ Name and description
- ✓ Custodial data sources
- ✓ Non-custodial data sources
- ✓ Additional locations
- **Search query**
- Review your collection

Define your search query

Use the query builder or i Query language-country/region: None [learn more about queries](#)

Query language-country/region: None

☒ Use new query builder

☒ Query builder

☐ KQL editor

Filters

AND

Select a filter

+ Add filter

+ Add subgroup

Back

Next

Back

Next

Save and close

Cancel

Collections

New collection

- ✓ Name and description
- ✓ Custodial data sources
- ✓ Non-custodial data sources
- ✓ Additional locations
- Search query
- Review your collection

Define your search query

Use the query builder or editor to define your search. [Learn more about queries](#)

Query language-country/region: None 🌐

☒ Use new query builder

☐ Query builder

☒ KQL editor

test (c::s exam)

New collection

1 errors detected

Breaking syntax errors (1)

Parenthesis must contain matching opening and closing brackets (1)

- ✓ Name and description
- ✓ Custodial data sources
- ✓ Non-custodial data sources
- ✓ Additional locations
- Search query
- Review your collection

Back

Next

Define your search query

Use the query builder or editor to define your search. [Learn more about queries](#)

Query language-country/region: None 🌐

☒ Use new query builder

☒ Query builder

☐ KQL editor

Keywords

test (c::s exam)

☐ Show keyword list

+ Add condition ▾

Back

Next

Save and close

Cancel

Collections

New collection

- ✓ Name and description
- ✓ Custodial data sources
- ✓ Non-custodial data sources
- ✓ Additional locations
- ✓ Search query
- Review your collection

Review your collection and create it

Review your settings, data sources, and search criteria.

Summary

Name and description

Name

DFW_Test

[Edit](#)

Search criteria

test (-s) exam

[Edit](#)

Data sources

Custodial data sources

✓ Custodians

✓ Young, Kelly A (DFW) (2)

kelly.young@dfw.wa.gov

https://stateofwa-my.sharepoint.com/personal/kelly_young_dfw_wa_gov/

[Edit](#)

Non custodial data sources

None selected

[Back](#)

[Submit](#)

New collection

✓ Name and description

✓ Custodial data sources

✓ Non-custodial data sources

✓ Additional locations

✓ Search query

✓ Review your collection



New collection created

Your collection will be added to your review set as a draft collection. You can calculate estimates for this collection as well as view a representative selection of its results from the collections list. Once you are satisfied with the results, you can commit this collection to the review set.

Related features

[Add more data sources to this case](#)

[Done](#)

Collections

eDiscovery (Premium) > Cases > DFW_VersionTest

Overview Data sources Collections Review sets Communications Hold Processing E

+ New collection Refresh Edit collection Commit collection Update estimates

Name	Review set	Status
☒ DFW_Test2		Estimated
☐ DFW_Test		Progressing
☐ DFW_VersionTest2	DFW_VersionTest	Committed
☐ DFW_VersionTest	DFW_VersionTest	Committed

DFW_Test2

Estimated

Updated 10/10/2023, 3:16:50 PM

Review search statistics and samples to determine if you want to rerun, edit, review, or export the collection.

Summary Data sources Search statistics Collection options

Collection overview

Understand how the items were found, retrieved, and processed as part of this collection.

Locations with hits

We **searched 5 locations**, and found **3 locations with hits**.
2 mailboxes and 1 sites had search hits.

Pre-collection estimates

1,131 items (~458.64 MB) had search hits.
0 items were partially indexed and weren't fully searched. You can add these items to a review set for inspection.
[Learn more about partial indexing.](#)

View samples

Collection parameters

Commit collection

Actions

DFW_Test2

Estimated

Updated 10/10/2023, 3:16:50 PM

Review search statistics and samples to determine if you want to rerun, edit, review, or export the collection.

Summary Data sources Search statistics Collection options

Collection estimates

Condition report

[Download your search condition report.](#)

Location type	Part	Condition	Locations with hits	Items	Size (MB)
Exchange	Primary	((("test") OR ("exam"))	2	984	219.97
Exchange	Keyword	"test"	2	983	219.91
Exchange	Keyword	"exam"	2	1	0.06
SharePoint	Primary	(((((("test") OR ("exam"...	1	147	238.68
Advanced Index	Primary	test (cs) exam (cic)	2	0	0
SharePoint	Keyword	((("test") AND (NOT(!s...	1	145	237.8
SharePoint	Keyword	((("exam") AND (NOT(!...	1	9	21.83

Top locations

Commit collection

Actions

Close

Collections

Commit items to a review set

Gather items and process them into a review set. [Learn more about committing items](#)

☒ Add to new review set

Review set name

Enter a name for your review set

☐ Add to existing review set

DFW_VersionTest

Retrieval

Identify additional items to collect.

☒ Teams and Yammer conversations
Collect up to 12 hours of related conversations when a message matches a search.

☒ Cloud attachments
Collect items from links to SharePoint or OneDrive.

☐ All document versions
Collect all versions of SharePoint documents. If not selected, only current versions are collected.

☐ Partially indexed items
Collect unsearchable items that might be relevant.

Collection ingestion scale

☒ Add all of collection to review set

☐ Add only collection sample to review set. [Edit sample parameters](#)

Commit

Cancel

Commit items to a review set

Gather items and process them into a review set. [Learn more about committing items](#)

☐ Add to new review set

Review set name

Enter a name for your review set

☒ Add to existing review set

DFW_VersionTest

Retrieval

Identify additional items to collect.

☒ Teams and Yammer conversations
Collect up to 12 hours of related conversations when a message matches a search.

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☒ All document versions
Collect all versions of SharePoint documents. If not selected, only current versions are collected.

☐ Partially indexed items
Collect unsearchable items that might be relevant.

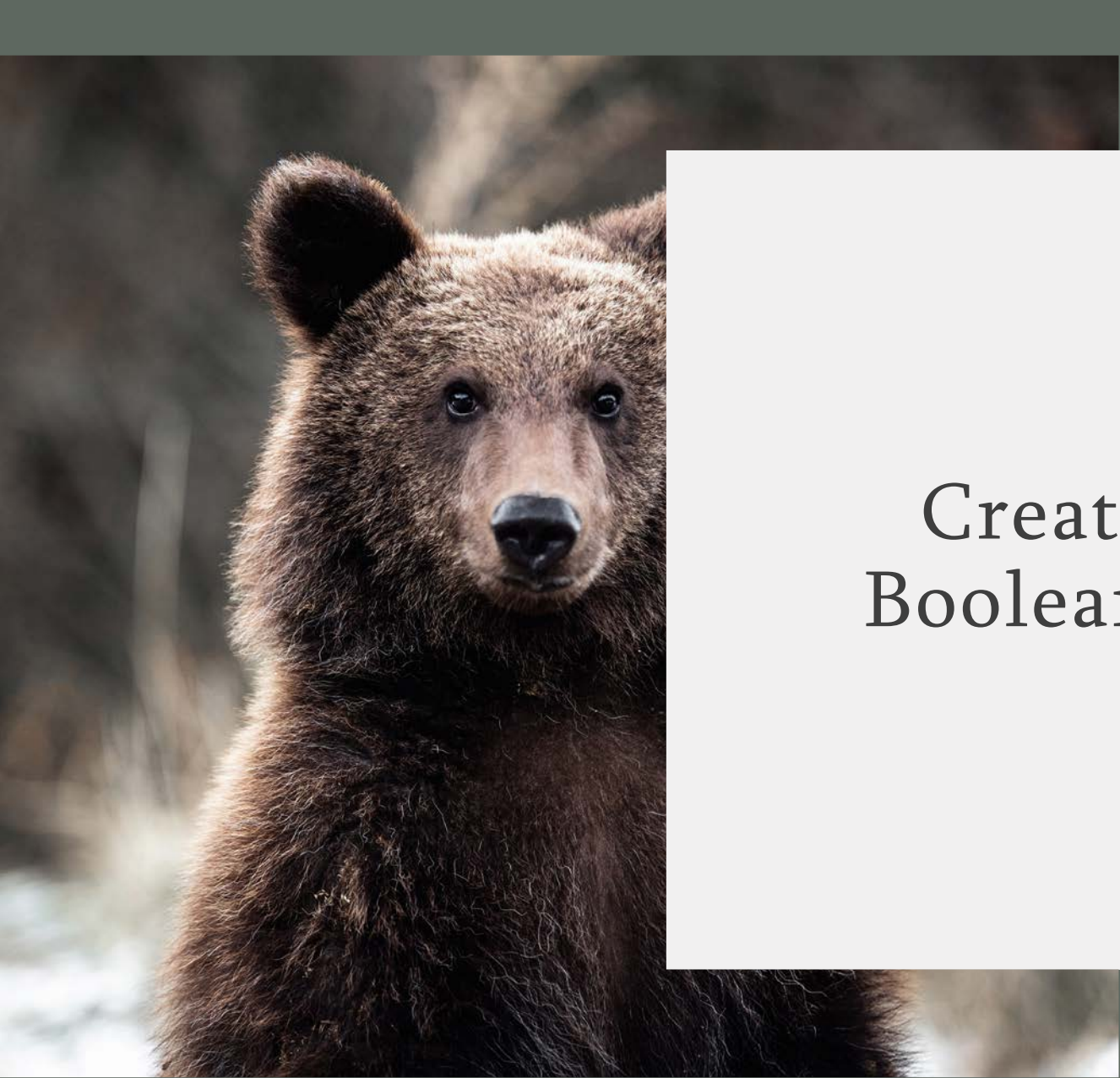
Collection ingestion scale

☒ Add all of collection to review set

☐ Add only collection sample to review set. [Edit sample parameters](#)

Commit

Cancel



Creating Search Plans: Boolean & KQL Language



Creating a Search Plan using Microsoft Boolean Search parameters

"All email sent by Kelly McDermott from August 8, 2023 to August 10, 2023 that mentions ice cream."

"All email received by Kelly McDermott from August 8, 2023 to August 10, 2023 that mentions ice cream, but not vanilla."

"All email sent and received by WDFW staff from August 8, 2023 to August 10, 2023 that mentions chocolate ice cream."

"All teams chat messages from August 8, 2023 to August 10, 2023 that mentions sprinkles and ice cream."

Search 1:

Date: August 8, 2023 to August 10, 2023 AND Message kind:email AND from:kelly.mcdermott@dfw.wa.gov AND ("ice cream" OR icecream)

Search 2:

Date: August 8, 2023 to August 10, 2023 AND Message kind:email AND to:kelly.mcdermott@dfw.wa.gov AND (("ice cream" OR icecream) NOT vanilla)

Search 3:

Date: August 8, 2023 to August 10, 2023 AND Message kind:email AND (chocolate NEAR(3) ("ice cream" OR icecream))

Search 4:

Date: August 8, 2023 to August 10, 2023 AND Message kind:im AND (sprinkle* OR ("ice cream" OR icecream))

Query Builder vs. Microsoft KQL

Define your search query

Use the query builder or editor to define your search. [Learn more about queries](#)

Query language-country/region: None

☒ Use new query builder

☒ Query builder

☐ KQL editor

Filters [X](#) Clear all

AND

Keywords

Equal

"ice cream" OR icecream



AND

Date

Between

8/8/2023-8/10/2023



Message kind

Equals any of

Email



Sender

Contains any of

McDermott, Kelly E (DFW)



[+](#) Add filter [Add subgroup](#)

[+](#) Add filter [Add subgroup](#)

Define your search query

Use the query builder or editor to define your search. [Learn more about queries](#)

Query language-country/region: None

☒ Use new query builder

☐ Query builder

☒ KQL editor

```
"ice cream" OR icecream (c:c) ((Date=2023-08-08..2023-08-10)) AND (Kind=email) AND (From:Kelly.McDermott@dfw.wa.gov)
```

0 errors detected

Query Builder vs. Microsoft KQL

Define your search query

Use the query builder or editor to define your search. [Learn more about queries](#)

Query language-country/region: None 🌐

☒ Use new query builder

☒ Query builder

☐ KQL editor

Filters ✕ Clear all

AND ▼

Keywords

Equal

((("ice cream" OR icecream...

✕

🗑️

AND ▼

🗑️

^

Date

Between

8/8/2023-8/10/2023

✕

🗑️

Message kind

Equals any of

Email

✕

🗑️

To

Contains any of

McDermott, Kelly E (DFW)

✕

🗑️

+ Add filter 📁 Add subgroup

+ Add filter 📁 Add subgroup

Define your search query

Use the query builder or editor to define your search. [Learn more about queries](#)

Query language-country/region: None 🌐

☒ Use new query builder

☐ Query builder

☒ KQL editor

```
((("ice cream" OR icecream) NOT vanilla) (c:c) (((Date=2023-08-08..2023-08-10)) AND (Kind=email) AND (To:Kelly.McDermott@dfw.wa.gov)))
```

0 errors detected

Query Builder vs. Microsoft KQL

Define your search query

Use the query builder or editor to define your search. [Learn more about queries](#)

Query language-country/region: None 

☒ Use new query builder

☒ Query builder

☐ KQL editor

Filters  Clear all

AND 

Keywords Equal (chocolate NEAR(3) ("ice c...  

AND 

Date Between 8/8/2023-8/10/2023  

Message kind Equals any of Email  

+ Add filter  Add subgroup

+ Add filter  Add subgroup

Define your search query

Use the query builder or editor to define your search. [Learn more about queries](#)

Query language-country/region: None 

☒ Use new query builder

☐ Query builder

☒ KQL editor

```
(chocolate NEAR(3) ("ice cream" OR icecream)) (c:c) (((Date=2023-08-08..2023-08-10)) AND (Kind=email))
```

0 errors detected

Query Builder vs. Microsoft KQL

Define your search query

Use the query builder or editor to define your search. [Learn more about queries](#)

Query language-country/region: None 

☒ Use new query builder

☒ Query builder

☐ KQL editor

Filters  Clear all

AND 

Remove filter 

Keywords

Equal

sprinkle* OR ("ice cream" ...





AND 

Date

Between

8/8/2023-8/10/2023





Message kind

Equals any of

IM





+ Add filter  Add subgroup

+ Add filter  Add subgroup

Define your search query

Use the query builder or editor to define your search. [Learn more about queries](#)

Query language-country/region: None 

☒ Use new query builder

☐ Query builder

☒ KQL editor

```
sprinkle* OR ("ice cream" OR icecream) (c:c) (((Date=2023-08-08..2023-08-10)) AND (Kind=im))
```

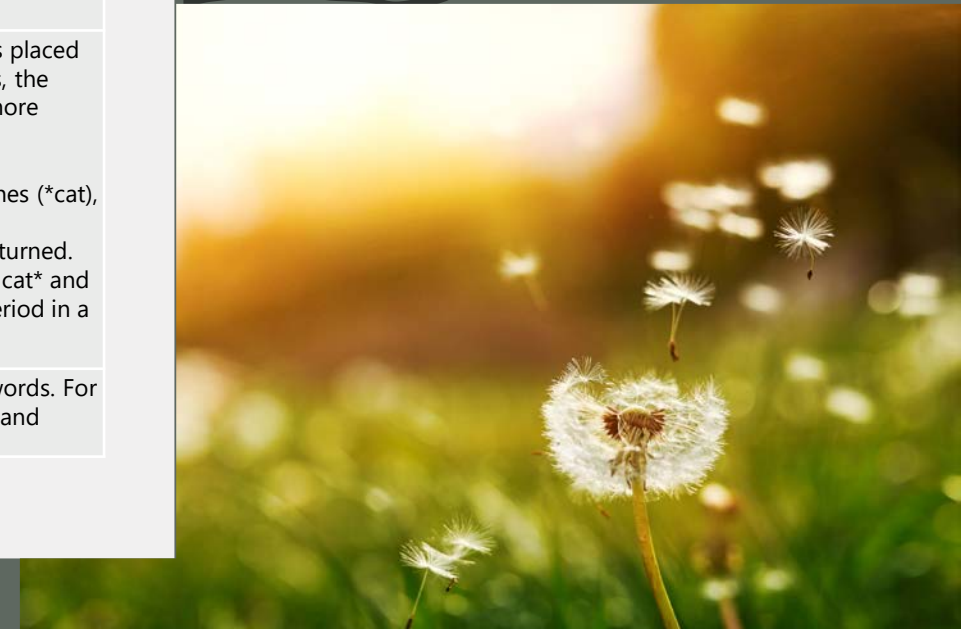
0 errors detected

Most Common Search Operators that can be used in Microsoft eDiscovery

AND	keyword1 AND keyword2	Returns items that include all of the specified keywords or property:value expressions. For example, from:"Ann Beebe" AND subject:northwind would return all messages sent by Ann Beebe that contained the word northwind in the subject line. 2
OR	keyword1 OR keyword2	Returns items that include one or more of the specified keywords or property:value
NOT	keyword1 NOT keyword2	Excludes items specified by a keyword or a property:value expression.
NEAR	keyword1 NEAR(n) keyword2	Returns items with words that are near each other, where n equals the number of words apart (including the keywords). For example, best NEAR(5) worst returns any item where the word 'worst' is within four other words of 'best' (because the word 'worst' is inclusive for the specified count of 5). If no number is specified, the default distance is eight words.
" "	"fair value" subject:"Quarterly Financials"	In a keyword query use double quotation marks (" ") to search for an exact phrase or term.
*	cat* subject:set*	Prefix searches (also called prefix matching) where a wildcard character (*) is placed at the end of a word in keywords or property:value queries. In prefix searches, the search returns results with terms that contain the word followed by zero or more characters. Note: You can use only prefix searches; for example, cat* or set*. Suffix searches (*cat), infix searches (c*t), and substring searches (*cat*) aren't supported. Also, adding a period (.) to a prefix search will change the results that are returned. That's because a period is treated as a stop word. For example, searching for cat* and searching for cat.* will return different results. We recommend not using a period in a prefix search.
()	(fair OR free) AND (from:contoso.com) (IPO OR initial) AND (stock OR shares) (quarterly financials)	Parentheses group together Boolean phrases, property:value items, and keywords. For example, (quarterly financials) returns items that contain the words quarterly and financials.

<https://learn.microsoft.com/en-us/purview/discovery-keyword-queries-and-search-conditions?view=o365-worldwide>

<https://learn.microsoft.com/en-us/purview/discovery-ql-editor?view=o365-worldwide>



Search tips and tricks

- The time zone for all searches is Coordinated Universal Time (UTC). Changing time zones for your organization isn't currently supported. Time zone display settings in the search view are only for applicable for values in Data column and don't affect time stamps on collected items.
- Keyword searches aren't case-sensitive. For example, cat and CAT return the same results.
- The Boolean operators AND, OR, NOT, and NEAR must be uppercase.
- A space between two keywords or two property:value expressions is the same as using OR. For example, from:"Sara Davis" subject:reorganization returns all messages sent by Sara Davis or messages that contain the word reorganization in the subject line.
- When searching a recipient property, such as To, From, Cc, or Recipients, you can use an SMTP address, alias, or display name to denote a recipient. For example, you can use pilarp@contoso.com, pilarp, or "Pilar Pinilla".
- You can use only prefix wildcard searches; for example, cat* or set*. Suffix searches (*cat), infix searches (c*t), and substring searches (*cat*) aren't supported.
- When searching a property, use double quotation marks (" ") if the search value consists of multiple words. For example, subject:budget Q1 returns messages that contain budget in the subject line and that contain Q1 anywhere in the message or in any of the message properties. Using subject:"budget Q1" returns all messages that contain budget Q1 anywhere in the subject line.

<https://learn.microsoft.com/en-us/purview/ediscovery-keyword-queries-and-search-conditions?view=o365-worldwide>

<https://learn.microsoft.com/en-us/purview/ediscovery-kql-editor?view=o365-worldwide>



Setting up Review Sets for Success



Review Sets

eDiscovery (Premium)

Cases > DFW_VersionTest

☆

Overview

Data sources

Collections

Review sets

Communications

Hold

Processing

Exports

Jobs

Settings

Analyze, organize, annotate, redact, and tag collected items for export. [Learn more about review sets](#)

+ Add review set

Download list

Refresh

1 item

Time zone

Search

Group

Customize columns

Filters:

Size: Any

Last modified: Any

Filters

Review set	Size	Created by	Last modified (UTC-07:00)	Modified by	Collections (sources)	Exports	Description
☐ DFW_VersionTest	140.8 MB	Kelly.McDermott.oadm@dfw.wa.gov	Aug 23, 2023 8:21:00 AM	Kelly.McDermott.oadm@dfw.wa.gov	3	2	



×

Close

Add review set

To add items to this set, upload them or add them from collections or other review sets. [Learn about adding items](#)

Name *

Provide a distinct name for this set.

Description

Describe this set for future reference.

Add

Cancel

Review Sets

DFW_VersionTest

[Overview](#) [Load sets](#) [Exports](#) [Jobs and errors](#)

 Time zone 

Review set name

DFW_VersionTest [Edit name and description](#)

Description

-

Created on (UTC-07:00)

Aug 23, 2023 8:21:00 AM

Created by

Kelly.McDermott.oadm@dfw.wa.gov

Last modified (UTC-07:00)

Aug 23, 2023 8:21:00 AM

Last modified by

Kelly.McDermott.oadm@dfw.wa.gov

Size

140.80 MB

Collections

3

Exports

2

[Open review set](#)

DFW_VersionTest

[Overview](#) [Load sets](#) [Exports](#) [Jobs and errors](#)

 Time zone 

Collections

Name	Processing status	Last modified (UTC-07:00)	Created by	Committed items
DFW_Test2	In progress	Oct 10, 2023 5:14:22 PM	Kelly.McDermott.oadm@dfw.wa.gov	
DFW_VersionTest2	Successful	Aug 30, 2023 11:47:56 AM	Kelly.McDermott.oadm@dfw.wa.gov	2009
DFW_VersionTest	Successful	Aug 23, 2023 9:16:44 AM	Kelly.McDermott.oadm@dfw.wa.gov	507

Other sources

You don't have uploaded items or items from other review sets. [Add data](#)

[Open review set](#)

Review Sets

DFW_VersionTest

Overview Load sets **Exports** Jobs and errors

🌐 Time zone ▾

Name	Status	Created by	Created Time (UTC-07:00)	End date (UTC-07:00)	Size
ContentExport	Successful	Kelly.McDermott.loadm@dfw.wa.gov	Aug 23, 2023 10:41:43 AM		
ContentExport	Successful	Kelly.McDermott.loadm@dfw.wa.gov	Aug 23, 2023 10:38:47 AM		

Open review set

DFW_VersionTest

Overview Load sets Exports **Jobs and errors**

🌐 Time zone ▾

Jobs

Filter jobs by status ▾

Job name	Status	Created Time (UTC-07:00)	End date (UTC-07:00)	Duration	Errors
Add items to review set	In progress	Oct 10, 2023 5:14:19 PM	Invalid date	5m, 19s	
Add items to review set	Successful	Aug 23, 2023 10:08:05 AM	Aug 23, 2023 10:29:39 AM	21m, 33s	
Add items to review set	Successful	Aug 23, 2023 8:21:02 AM	Aug 23, 2023 8:39:32 AM	18m, 29s	
Run analytics	Successful	Aug 30, 2023 11:54:32 AM	Aug 30, 2023 12:02:45 PM	8m, 12s	
Prepare for export	Successful	Aug 23, 2023 10:41:43 AM	Aug 23, 2023 10:52:18 AM	10m, 34s	
Prepare for export	Successful	Aug 23, 2023 10:38:47 AM	Aug 23, 2023 10:49:21 AM	10m, 34s	

Open review set

Review Sets

eDiscovery (Premium) > Cases > DFW_VersionTest > DFW_VersionTest

Saved filter queries Save Clear all

Filters Undo filter query Redo filter query

AND

Overview

Analytics

Actions

Tag files

Manage

Refresh

2516 items

Add new documents to analytics

Run Document & email analytics

Show reports

Manage predictive coding (preview)

		Tag Status	Date (UTC-07:00)	Sender/Author	File class	
☐	> 1		Aug 23, 2023 8:01:...	McDermott, Kelly E...	Email	
☐	> 2	No Tag	Aug 23, 2023 8:03:...	McDermott, Kelly E...	Email	
☐	> 3	No Tag	Aug 23, 2023 8:03:...	McDermott, Kelly E...	Email	
☐	> 4	McDermott, Kelly E...		Aug 23, 2023 8:01:...	McDermott, Kelly E...	Email
☐	5	Test	No Tag	Aug 23, 2023 8:03:...	/O=EXCHANGELAB...	Email
☐	> 6	Test Email	No Tag	Aug 23, 2023 8:03:...	McDermott, Kelly E...	Email
☐	> 7	Test Email	No Tag	Aug 23, 2023 8:03:...	McDermott, Kelly E...	Email
☐	8	JIRA Ticket Flow.xlsx	No Tag	Jun 22, 2023 10:16:...	kelly.mcdermott@...	Document
☐	9	JIRA Ticket Flow.xlsx	No Tag	Jun 1, 2023 5:00:27...	kelly.mcdermott@...	Document
☐	10	JIRA Ticket Flow.xlsx	No Tag	Jul 3, 2023 11:26:33...	kelly.mcdermott@...	Document
☐	11	JIRA Ticket Flow.xlsx	No Tag	Jul 11, 2023 3:08:08...	kelly.mcdermott@...	Document
☐	12	JIRA Ticket Flow.xlsx	No Tag	Apr 6, 2023 5:40:48...	kelly.mcdermott@...	Document
☐	13	JIRA Ticket Flow.xlsx	No Tag	May 1, 2023 2:35:0...	kelly.mcdermott@...	Document
☐	14	JIRA Ticket Flow.xlsx	No Tag	Jun 8, 2023 2:23:26...	kelly.mcdermott@...	Document
☐	15	JIRA Ticket Flow.xlsx	No Tag	Aug 22, 2023 10:04...	kelly.mcdermott@...	Document
☐	16	JIRA Ticket Flow.xlsx	No Tag	Apr 19, 2023 11:42...	kelly.mcdermott@...	Document

Subject line

1 of 819 selected

	#	Subject/Title	Status	Tag Status	Date (UTC-07:00)	Sender/Author	File class
☐	211	Hi Chad hope all is...	Ready	No Tag	Apr 11, 2023 11:20:...	Yusa, Mark K (DF...	Conversation
☒	212	Hi WDFW! New job...	Tagged	+1	Apr 10, 2023 3:53:4...	RecruitmentTeam (...)	Email
☐	213	Hi WDFW! New job...	Ready	No Tag	Apr 10, 2023 3:53:4...	RecruitmentTeam (...)	Email
☐	214	In-Warehouse Hot ...	Ready	No Tag	Apr 1, 2023 6:52:08...	Costco Wholesale ...	Email
☐	215	In-Warehouse Hot ...	Ready	No Tag	Apr 1, 2023 6:40:34...	Costco Wholesale ...	Email
☐	216	In-Warehouse Hot ...	Ready	No Tag	Apr 1, 2023 6:09:24...	Costco Wholesale ...	Email
☐	217	In-Warehouse Hot ...	Ready	No Tag	Apr 1, 2023 5:55:17...	Costco Wholesale ...	Email
☐	218	In-Warehouse Hot ...	Ready	No Tag	Apr 1, 2023 5:19:22...	Costco Wholesale ...	Email
☐	219	ITS_COSTS_FEB23.xl...	Ready	No Tag	Apr 6, 2023 8:32:58...	jairus.green@dfw...	Document
☐	220	Joint_statement_re...	Ready	No Tag	Apr 6, 2023 10:21:3...	jan.ohilberger@dfw...	Document
☐	> 221	Kelly S quote for sa...	Ready	No Tag	Apr 4, 2023 2:26:27...	Yusa, Mark K (DF...	Email
☐	> 222	Lake Wa report	Ready	No Tag	Apr 10, 2023 3:19:0...	Antipa, Brodie J (D...	Email

Source

Plain text

Annotate

Metadata

Show pinned metadata

From: RecruitmentTeam (DFW) <RecruitmentTeam@dfw.wa.gov>

Sent on: Monday, April 10, 2023 10:53:48 PM

To: DFW DL WDFW Staff <DFWDLWDFWSTAFF@dfw.wa.gov>

CC: Dapp, Derek R (DFW) <Derek.Dapp@dfw.wa.gov>

Subject: Hi WDFW! New job posting - IT Salmon Stock and Fishery Modeler - IT Data Mgt-Journey Level - Permanent - *04969-23

Good afternoon, DFW Team!

Please look at this recruitment – we encourage you to share this great opportunity with your friends and business networks!

[IT Salmon Stock and Fishery Modeler - IT Data Mgt-Journey Level - Permanent - *04969-23](#)

Photos courtesy of WDFW Photo Gallery

Baker Lake sockeye fishing – picture credit: Hermes Adrada

Test fishing – Photo credit: WDFW

Tag

Group by conversations (2499)

Conversation (2498)

Exact Duplicates (2484)

Review Sets

eDiscovery (Premium) > Cases > DFW_VersionTest > DFW_VersionTest

Saved filter queries

Save

Clear all

Filters

Undo filter query

Redo filter query

AND

2516 items

Subject line

			Subject/Title	Status	Tag Status	Date (UTC-07:00)	Sender/Author
☐	>	1	McDermott, Kelly E...	Tagged	LINK	Aug 23, 2023 8:01:...	McDermott, Kell
☐	>	2	Test	Ready	No Tag	Aug 23, 2023 8:03:...	McDermott, Kell
☐	>	3	Test	Ready	No Tag	Aug 23, 2023 8:03:...	McDermott, Kell
☐	>	4	McDermott, Kelly E...	Tagged	LINK	Aug 23, 2023 8:01:...	McDermott, Kell
☐		5	Test	Ready	No Tag	Aug 23, 2023 8:03:...	/O=EXCHANGEL
☐	>	6	Test Email	Ready	No Tag	Aug 23, 2023 8:03:...	McDermott, Kell
☐	>	7	Test Email	Ready	No Tag	Aug 23, 2023 8:03:...	McDermott, Kell
☐		8	JIRA Ticket Flow.xlsx	Ready	No Tag	Jun 22, 2023 10:16:...	kelly.mcdermott
☐		9	JIRA Ticket Flow.xlsx	Ready	No Tag	Jun 1, 2023 5:00:27...	kelly.mcdermott
☐		10	JIRA Ticket Flow.xlsx	Ready	No Tag	Jul 3, 2023 11:26:33...	kelly.mcdermott
☐		11	JIRA Ticket Flow.xlsx	Ready	No Tag	Jul 11, 2023 3:06:08...	kelly.mcdermott
☐		12	JIRA Ticket Flow.xlsx	Ready	No Tag	Apr 6, 2023 5:40:48...	kelly.mcdermott
☐		13	JIRA Ticket Flow.xlsx	Ready	No Tag	May 1, 2023 2:35:0...	kelly.mcdermott
☐		14	JIRA Ticket Flow.xlsx	Ready	No Tag	Jun 8, 2023 2:23:26...	kelly.mcdermott
☐		15	JIRA Ticket Flow.xlsx	Ready	No Tag	Aug 22, 2023 10:04:...	kelly.mcdermott

Subject line

eDiscovery (Premium) > Cases > DFW_VersionTest > Manage tags

Manage tags

Tag group names will be available as a metadata category in the review set. Each tag group will show up as its own column in the review set list.

+ Add tag group

Import tag templates

Tags

Responsive

Non-Responsive

Add tag

+ Add tag group

Tag files

Create/edit tags

Choose selection

Tag selected items (0)

Tag all items in list (2,516)

Expand selection

None

Preview

Tags

Responsive

Non-Responsive

Save

Reset

Close

Tag files

+ Create/edit tags

Choose selection

☐ Tag selected items (0)

☐ Tag all items in list (107)

Expand selection

None

Assign tags

Tags

☐ Responsive

☐ Non-Responsive

☐ Sensitive

☐ Query

☐ Exported

☐ Responsive_Versions

☐ Sensitive_Versions

Apply tags

Close

Review Sets

Saved filter queries ▾ ✕ Clear all

- [AutoGen] For Review
- [AutoGen] Potentially Immaterial Items
- Chat Review
- Meeting Review1
- Meeting Review2
- Email Review
- Document Review
- Export View
- Deduplicated

107 items 🌐 ▾ ☰ ▾ 📄 Subject line

Tag Status	Date (UTC-07:00)	
No Tag	Apr 11, 2023 8:10:2...	

Saved filter queries ▾ ✕ Clear all

Filters ↶ Undo filter query ↷ Redo filter query

AND ▾ ^

Message kind Equals any of microsoftteams , im ✕ 🗑

+ Add filter ⌵ Add subgroup

Saved filter queries ▾ ✕ Clear all

Filters ↶ Undo filter query ↷ Redo filter query

AND ▾ ^

Message kind Equals any of meetings ✕ 🗑

+ Add filter ⌵ Add subgroup

Saved filter queries ▾ ✕ Clear all

Filters ↶ Undo filter query ↷ Redo filter query

AND ▾ ^

Message kind Equals none of meetings, microsoftteams ... ✕ 🗑

Item class Equals any of IPM.Appointment, IP... , +4 ✕ 🗑

+ Add filter ⌵ Add subgroup

Review Sets

Saved filter queries Clear all

- [AutoGen] For Review
- [AutoGen] Potentially Immaterial Items
- Chat Review
- Meeting Review1
- Meeting Review2
- Email Review
- Document Review
- Export View
- Deduplicated

107 items Is any of microsoftteams , im

Tag Status	Date (UTC-07:00)	Subject line
ready	No Tag	Apr 11, 2023 8:10:2...

Saved filter queries Clear all

Filters Undo filter query Redo filter query

AND

- Message kind Equals none of meetings, microsoftteams ...
- File class Equals none of Document, Conversation
- Item class Equals none of IPM.Appointment, IP... , +4

+ Add filter Add subgroup

Saved filter queries Clear all

Filters Undo filter query Redo filter query

AND

- File class Equals any of Document
- Is embedded document Equals any of false

+ Add filter Add subgroup

Review Sets

Saved filter queries ✕ Clear all

- [AutoGen] For Review
- [AutoGen] Potentially Immaterial Items
- Chat Review
- Meeting Review1
- Meeting Review2
- Email Review
- Document Review
- Export View
- Deduplicated

Is any of microsoftteams , im ✕ 🗑️

107 items 🌐 📄 📅 Subject line

Tag Status	Date (UTC-07:00)
ready	No Tag Apr 11, 2023 8:10:2...

Saved filter queries ✕ Clear all

Filters ↶ Undo filter query ↷ Redo filter query

AND ⌵ ⌴

Is embedded document Equals any of false ✕ 🗑️

+ Add filter 📁 Add subgroup

Saved filter queries ✕ Clear all

Filters ↶ Undo filter query ↷ Redo filter query

AND ⌵ ⌴

Marked as representative Contains any of Unique ✕ 🗑️

Is embedded document Equals any of false ✕ 🗑️

+ Add filter 📁 Add subgroup

Exporting



Exporting

Saved filter queries Save Clear all

Filters Undo filter query Redo filter query

AND

Marked as representative Contains any of Unique

Is embedded document Equals any of false

Add filter Add subgroup

2917 items

	Status	Tag Status	Date (UTC-07:00)
☐	Ready	No Tag	Apr 3, 2023 10:09:4...
☐	Ready	No Tag	Apr 7, 2023 2:35:49...

Export options

Export name *

Export name

Description

Description for the export

Export these documents *

- ☒ Selected documents only
- ☐ All filtered documents
- ☐ All documents in the review set

Expand selection

None

Output options *

- ☐ Report only
- ☐ Loose files and PSTs (email is added to PSTs when possible)
- ☒ Condensed directory structure
- ☐ Condensed directory structure exported to your Azure Storage account

Container URL

Container URL

SAS token

SAS token for the Azure Storage account

Include

- ☐ Tags
- ☐ Text files
- ☐ Replace redacted natives with converted PDFs

Export

Cancel



Questions?





Contact Information

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360-972-5876

