

Discovery Attender for Exchange



Version 3.0

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Welcome

Thank you for choosing Discovery Attender for Exchange®. This application is designed to make the searching, viewing and management of electronic data easy and efficient. Discovery Attender can search PSTs, Microsoft Exchange Mailboxes and Public Folders as well as loose files stored on Windows network accessible file shares. To search successfully, you only need Outlook and proper permissions to access your chosen search locations.

Permissions

- Discovery Attender uses the Login credentials (i.e. NT Account) of the user on the machine where the program is installed to access file shares and mail store locations.
- If you are searching mailboxes or public folders on an Exchange Server, you will need the following permissions added to the NT account that Discovery Attender is using:
 - Exchange 5.5 : Service Account Admin Rights
 - Exchange 2000 and 2003: Full Exchange Admin Rights including [Send As](#) and [Receive As](#) permissions. Note: By default, Domain Administrator accounts are **denied** access to all users' mailboxes. Please reference the following Microsoft knowledge base articles if you have difficulties with service account permissions:
 - Exchange 2000: Q262054
 - Exchange 2003: Q821897
 - Exchange 2007: Use the [Exchange Shell Manager](#) to assign [Send As](#) and [Receive As](#) permissions.
- The user account should also have [Local Administrator Rights](#) on the machine where Discovery Attender is installed. That account should be able to read and write to the registry as well as the installation directory
- The user will need to have read/write access to locations where the Discovery Attender Projects will be saved.
- If you are running Discovery Attender on a Windows **Vista** machine, you must select the "Run this program as administrator" privilege level under Properties > Compatibility once the product is installed.

Where to Install

- Discovery Attender can be installed on a desktop workstation, laptop or server. The more memory and processing power on the machine, the faster the searches and actions will be.
- Never install Discovery Attender on a machine running mission critical applications without testing it first.
- Discovery Attender has the ability to search files on the same computer or across a network. A slow connection can cause delays with the processing of files and reduce the efficiency of the product.
- Microsoft Outlook must be installed on the machine where Discovery Attender is installed. Outlook provides the MAPI drivers needed for communication with mail stores. These drivers are not initialized until a profile is created and Outlook opened at least once. If Discovery Attender is installed on an Exchange server (not recommended), this step is not required as Exchange has its own MAPI drivers.
- If you are searching new format PST files (i.e. Outlook 2003 and above), be sure you have Outlook version 2003 or above installed and configured.
- .Net Framework Version 2.0 will be installed if not present on the installation machine.
- Microsoft Visual 2005 Runtime C++ library (SP1) and Microsoft Visual 2008 Runtime C++ library will be installed or updated if not present on the installation machine.
- Installing Discovery Attender on a production Exchange server is **not** recommended due to potential CPU or I/O constraints. If you do install Discovery Attender on an Exchange server, you will not be able to search PSTs due to Exchange MAPI constraints. Do not install Outlook if you are installing Discovery Attender on an Exchange server.

System Requirements

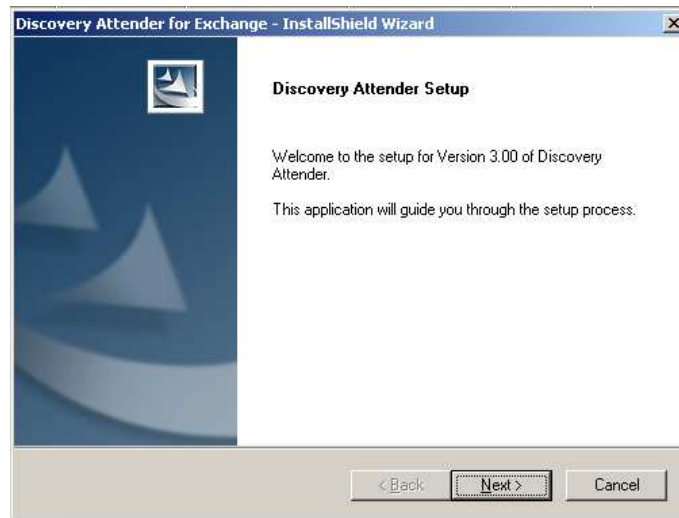
Discovery Attender runs as a stand-alone application on your desktop or server.

- Windows 2000 or higher
- 1 GHz or higher CPU
- 1 gigabyte of RAM or higher
- Outlook 98 or Higher installed and configured
- Approximately 50 MB HD for the installation. Additional Hard Drive space will be required as projects, searches and (optional) indexes are created.

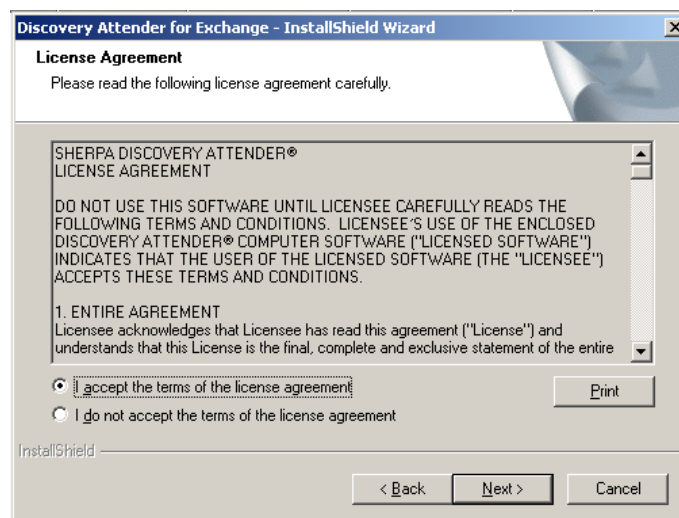
Installation Guide

The following are general steps to install Discovery Attender.

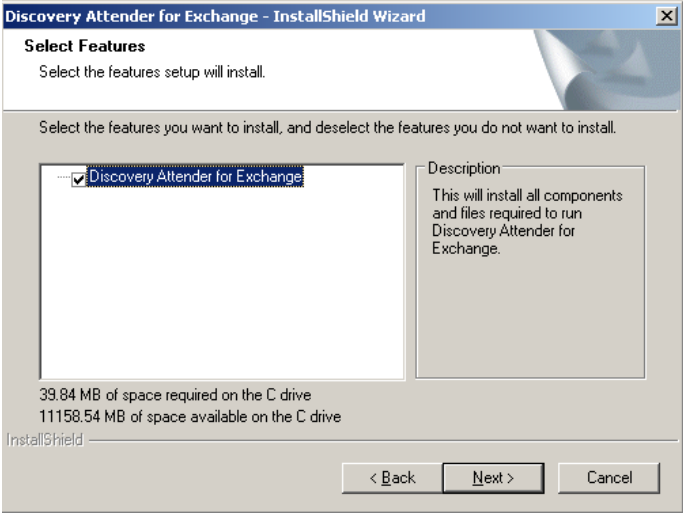
1. Choose the server or computer where you wish to install Discovery Attender.
2. Verify that Outlook has been installed and run at least once with at least one profile. Outlook is not completely configured until the first profile has been created. This step does not apply for Exchange Server installation (*not recommended*).
3. Double-Click the Setup.exe file to begin the installation of Discovery Attender. If you received a Discovery Attender CD, place it in your computer's CD drive. The InstallShield™ wizard should automatically launch the setup.



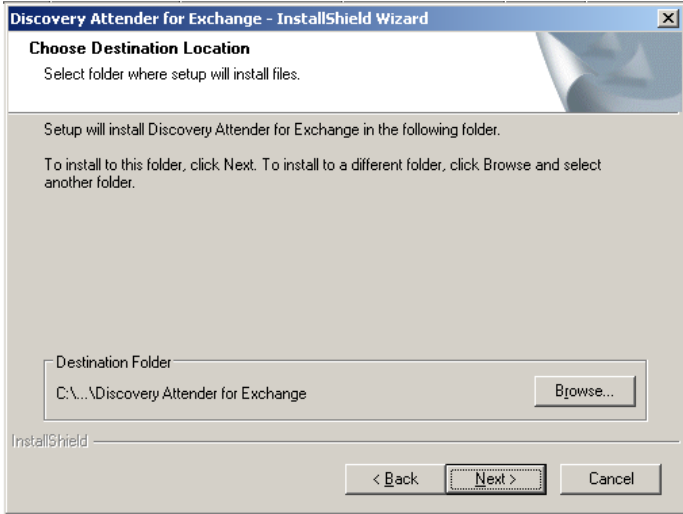
4. Follow the screens as prompted. You must accept the Discovery Attender License Agreement to continue with the installation.



- 5. Select Discovery Attender as the feature you wish to install.

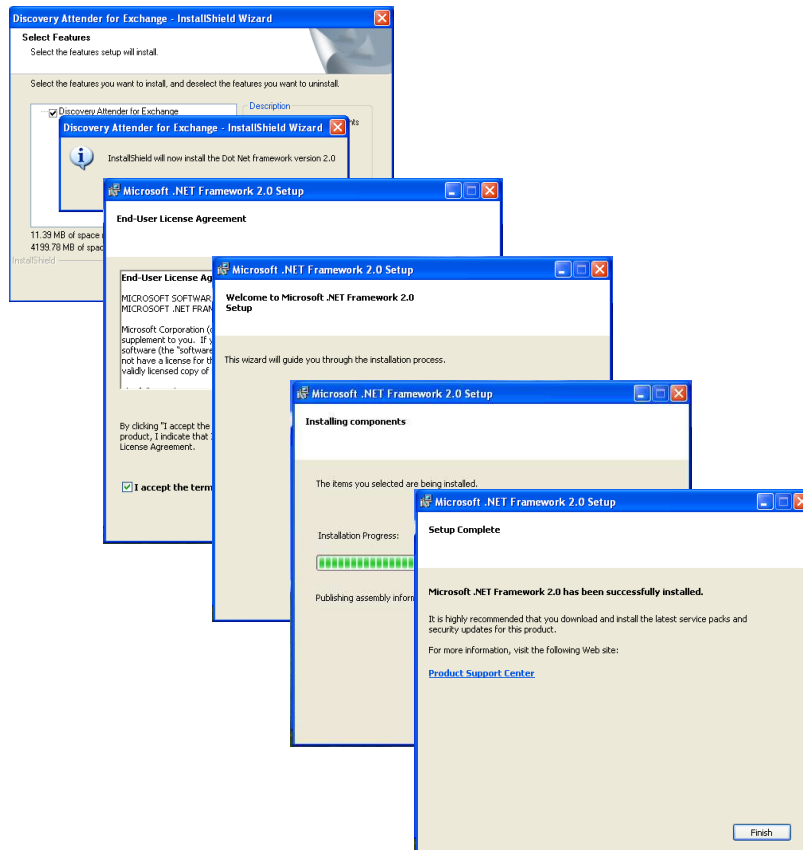


- 6. Select the location where you wish to install Discovery Attender. In addition to the program files, this destination stores log files and a temporary directory. Verify the login account has read/write permission to this location.

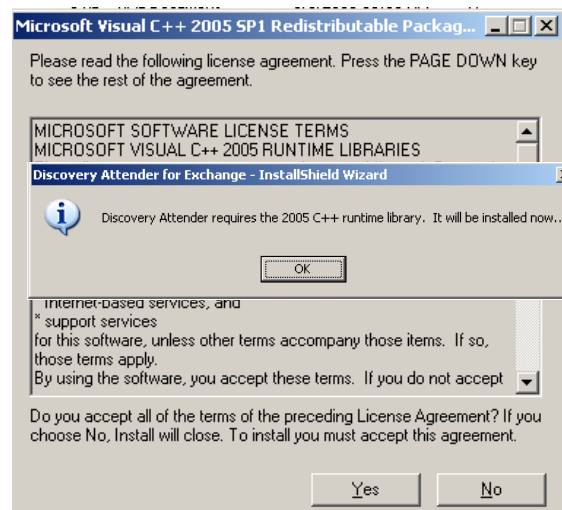


Getting Started

- If the .Net Framework 2.0 is not installed on the installation machine, you will be prompted to do so. Follow the prompts in the .Net installation wizard. This may take a few minutes.



- You will be prompted to install the newest 2005 C++ runtime library if it is not already installed. Please follow the prompts and accept the license agreement.

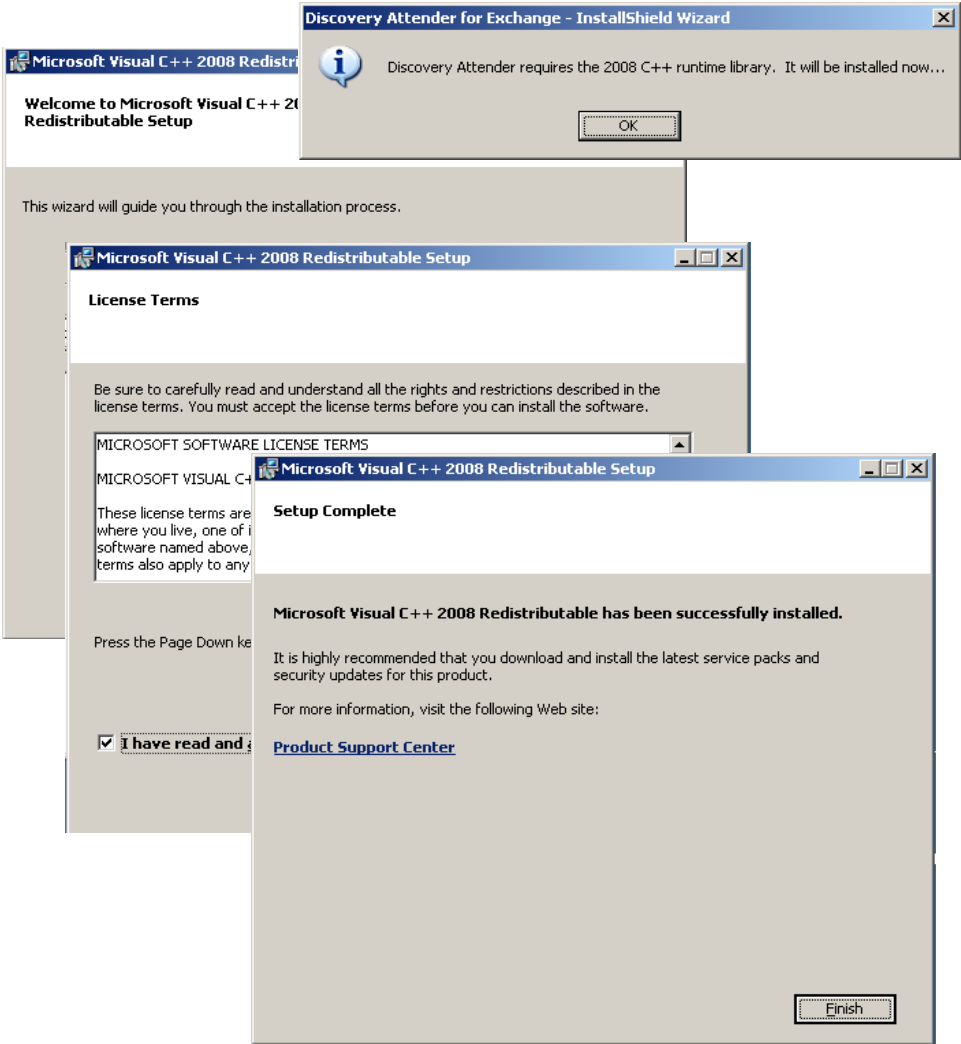


Getting Started

- 9. If you have an older version of the 2005 C++ runtime library, you will be prompted to upgrade and reboot:



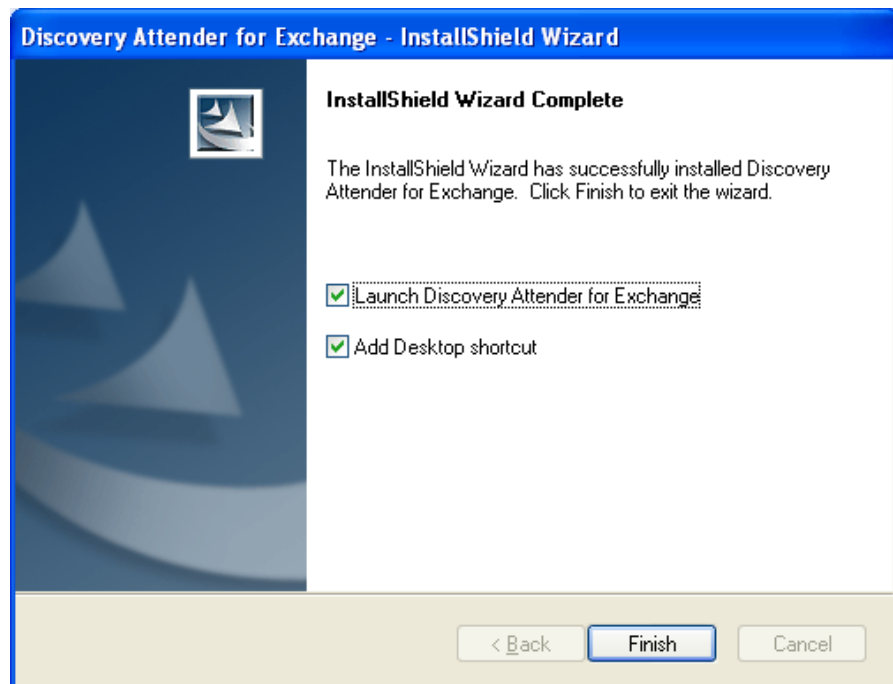
- 10. The 2008 C++ runtime library will be installed if you do not already have it. Please follow the prompts and affirm the license agreement.



Getting Started

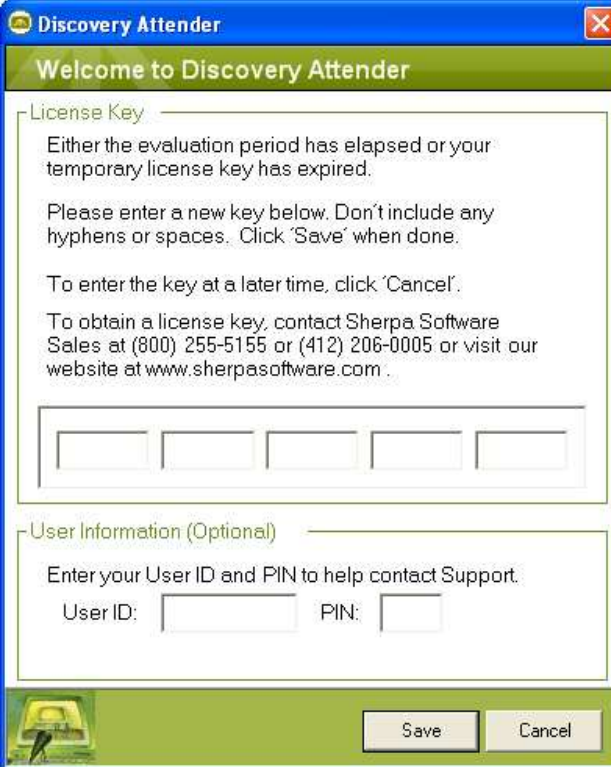
11. Discovery Attender will be installed with a new program group created on your start menu. At any time you can go to *Start – Programs – Discovery Attender for Exchange – Start Discovery Attender* to begin.
12. At the conclusion of the installation, you will have an option to launch Discovery Attender and an option to create a shortcut onto your desktop. Make your selections. If you select the 'Launch...' checkbox, clicking 'Finish' will start the application.

Note: If you are running Discovery Attender on a Windows **Vista** machine, you must select the "Run this program as administrator" privilege level under Properties > Compatibility once the product is installed.



License Key

The License Key setup screen will appear on startup of a new installation. Enter your license key and click **Save**. This step does not apply to the demo or evaluation versions.



The screenshot shows a window titled "Discovery Attender" with a green header bar. Below the header, the text reads "Welcome to Discovery Attender". The main content area is divided into two sections. The first section, titled "License Key", contains the following text: "Either the evaluation period has elapsed or your temporary license key has expired. Please enter a new key below. Don't include any hyphens or spaces. Click 'Save' when done. To enter the key at a later time, click 'Cancel'. To obtain a license key, contact Sherpa Software Sales at (800) 255-5155 or (412) 206-0005 or visit our website at www.sherpasoftware.com .". Below this text is a five-character input field. The second section, titled "User Information (Optional)", contains the text "Enter your User ID and PIN to help contact Support." and two input fields labeled "User ID:" and "PIN:". At the bottom of the window, there are two buttons: "Save" and "Cancel".

You can change the license key at any time by using the Help → About menu option on the main console screen.

When upgrading from a previous version, Discovery Attender will use the license key from the existing installation.

Uninstall

To un-install Discovery Attender, open the Control Panel, choose Add/Remove Programs, and select Discovery Attender from the list.

All information stored in the default application directory, including any project data, will be deleted. Please make sure all projects stored underneath the installation directory have been backed up or moved.

Create Project

Discovery Attender organizes related searches and results in containers called Projects. When you first open Discovery Attender, you will be prompted to create a new project or select one from the list. The New Project screen can also be accessed by selecting *New Project* from the Application Menu on the Main Console.



Creating a new project performs several tasks. First, a new project directory is created using the project name. Housed under this directory is all the project related information including searches, database, results, logs and more. Make sure the location you select has sufficient information to store this data.

Project Name

This is the name of the project as it will appear in your project list and also the name of the folder which holds all the project details.

Description

User entered details which are stored with the project.

Project Path

User entered directory location for this project. The default location is the root directory, but you may want to store your projects in a location that is more centralized or has more storage capacity. Please make sure the length of the project path does not exceed 100 characters.

Project File

This is the complete path of the project file as stored.

Clicking the 'Create' button will create the project file, project directory and the default directory structure for the project.

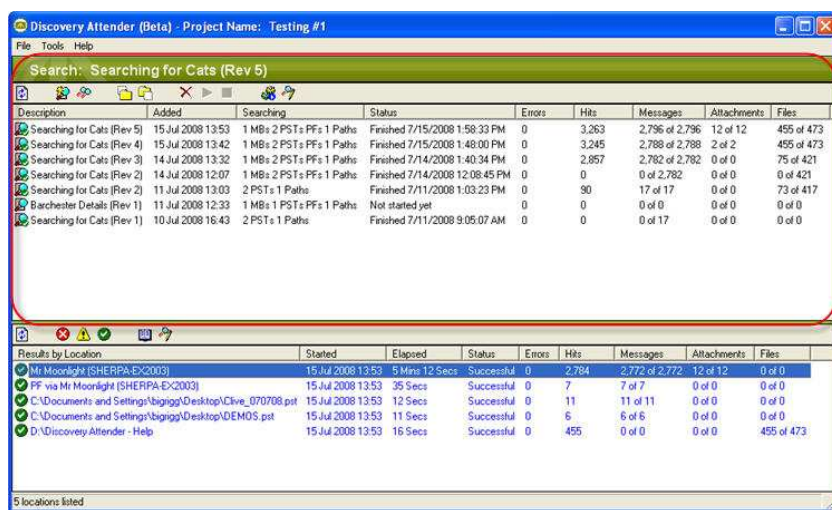
Click 'Cancel' if you do not want to create a project at this time. Please note, you cannot create or run searches without a project container.

Manage Searches (Main Console)

The main console allows you to create and manage your searches. It contains a summary of your searches and serves as the gateway for most Discovery Attender functionality. You can start new searches, modify existing searches (search again), cancel searches, or view the result summary.

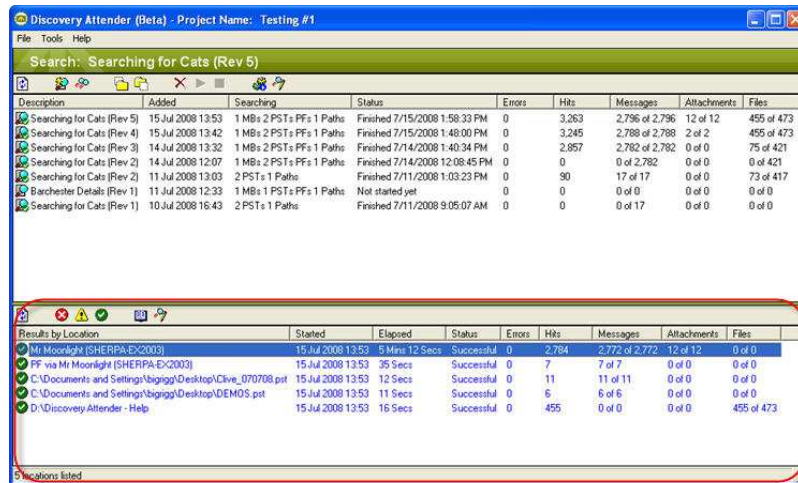
The main console is broken up into several parts:

- The top portion of the console is used for **Search Management**. This area holds a one line summary per search. Double-clicking on a search will open the **Result Details** window. Selecting a search will enable toolbar features and show a listing of the individual search tasks on the bottom half of the screen.



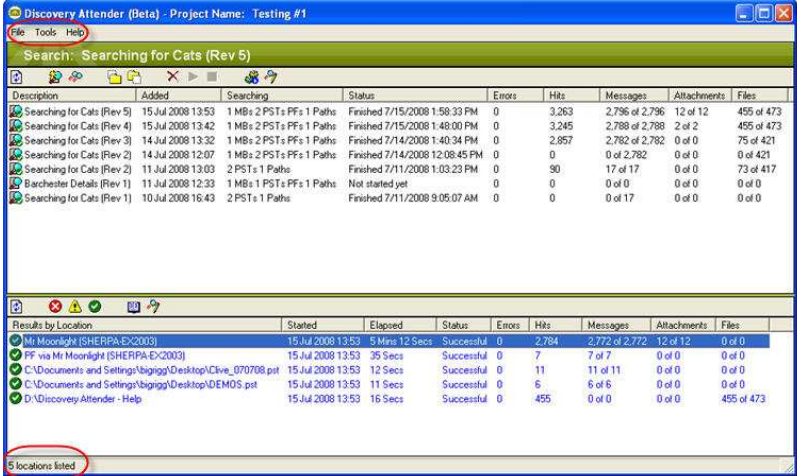
Getting Started

- The bottom portion of the console provides the **Results by Location** for each task or location of the search selected in the Search Management section. Double-clicking on an item will open the log file for error review and audit tracing for the individual task. Right click to open **Result Details** to access reports, views and export actions.



Getting Started

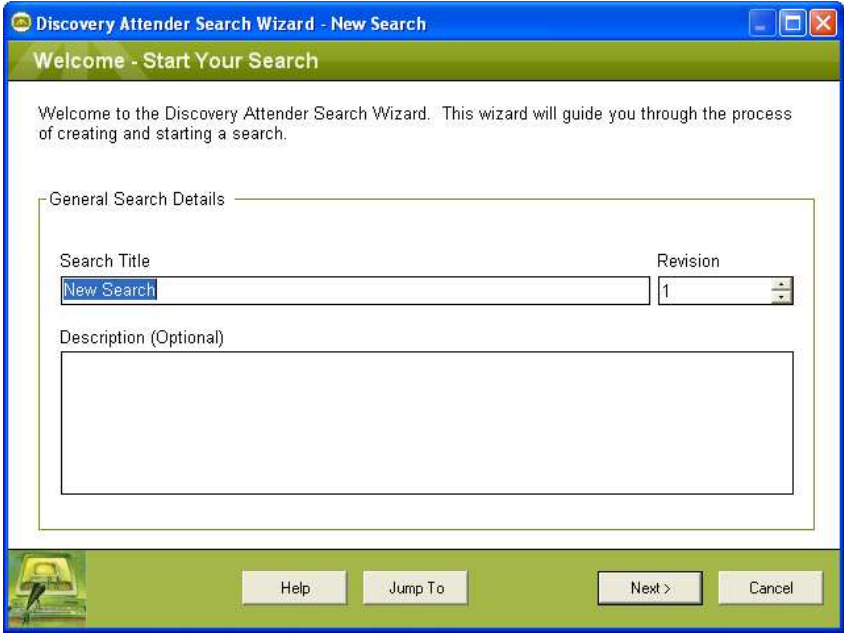
- The **Application Menu and Status Bar** round out the console screen. These menus allow you to manage projects, control application settings and learn more about Discovery Attender.



New Search (Search Wizard)

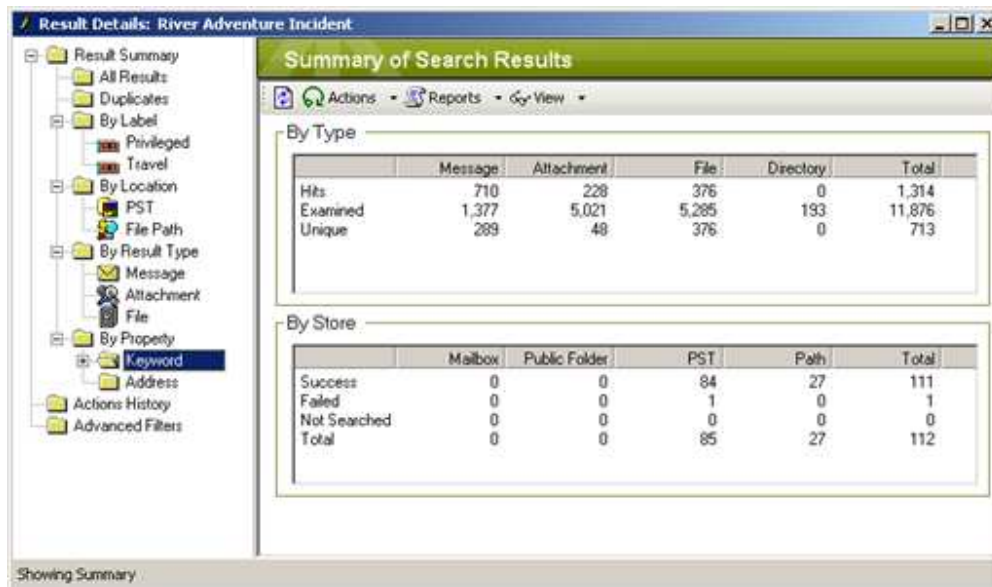
The Search Wizard guides the user in creating a search. Options selected on each screen will detail what criteria to use, setup the search conditions, and identify which PSTs, Mailboxes, Public Folders or File Paths will be searched. Navigation buttons are used to move from screen to screen. Once the wizard setup is complete, you can begin your search process.

The Search Wizard is reached by selecting, from the Main Console, either by using the toolbar to select New Search or Search Again, or by using the context menu or a Search Template.



Organize Results (Result Details)

The Result Details screen is the gateway to reporting, exporting and organizing the search result set. A tree view helps you navigate through the functionality, while robust tool bars and menus help you organize and export your results.

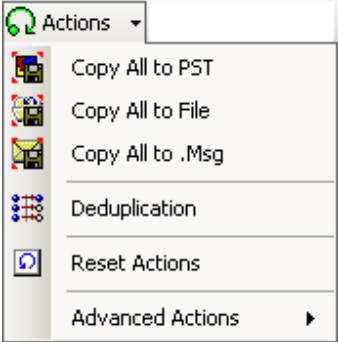


From the Result Details screen a variety of views can be reviewed:

- All Results Screen
- Duplicates Screen
- By Label
- By Location - Summary Screen
 - By Location - Public Folder Screen
 - By Location - Mailbox Screen
 - By Location - PST Screen
 - By Location - File Path Screen
- By Result Type
 - By Result Type - Message Screen
 - By Result Type - Attachment Screen
 - By Result Type - File Screen
- By Property - Summary Screen
 - By Property - Keyword Screen
 - By Property - Address Screen
- Actions History - Summary Screen
 - Actions History - Details Screen
- Advanced Filters - Summary Screen
 - Advanced Filters - Detail Screen

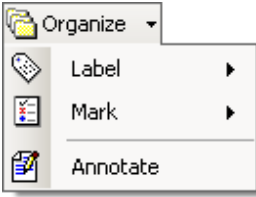
Export Items (Actions)

Via the Actions menu, a user can export items to a PST, File, or .MSG. Additionally, the administrator can run a de-duplication process to eliminate all duplicates from the result set.



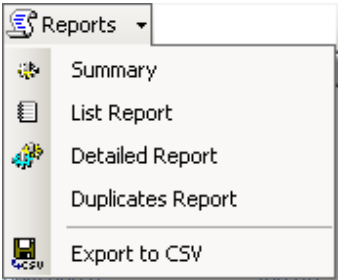
Organize Items

Discovery Attender has a number of options which allow a user to group, mark and annotate their result set. These options are fully customizable using the Settings menu.



Reports

Discovery Attender contains a number of built in reports to help you produce information about your result sets.



Contact

General phone support for installation is available Monday through Friday during our normal business hours of 8:30am to 5pm Eastern Time.

Additional support is available through an annual maintenance and support agreement.

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