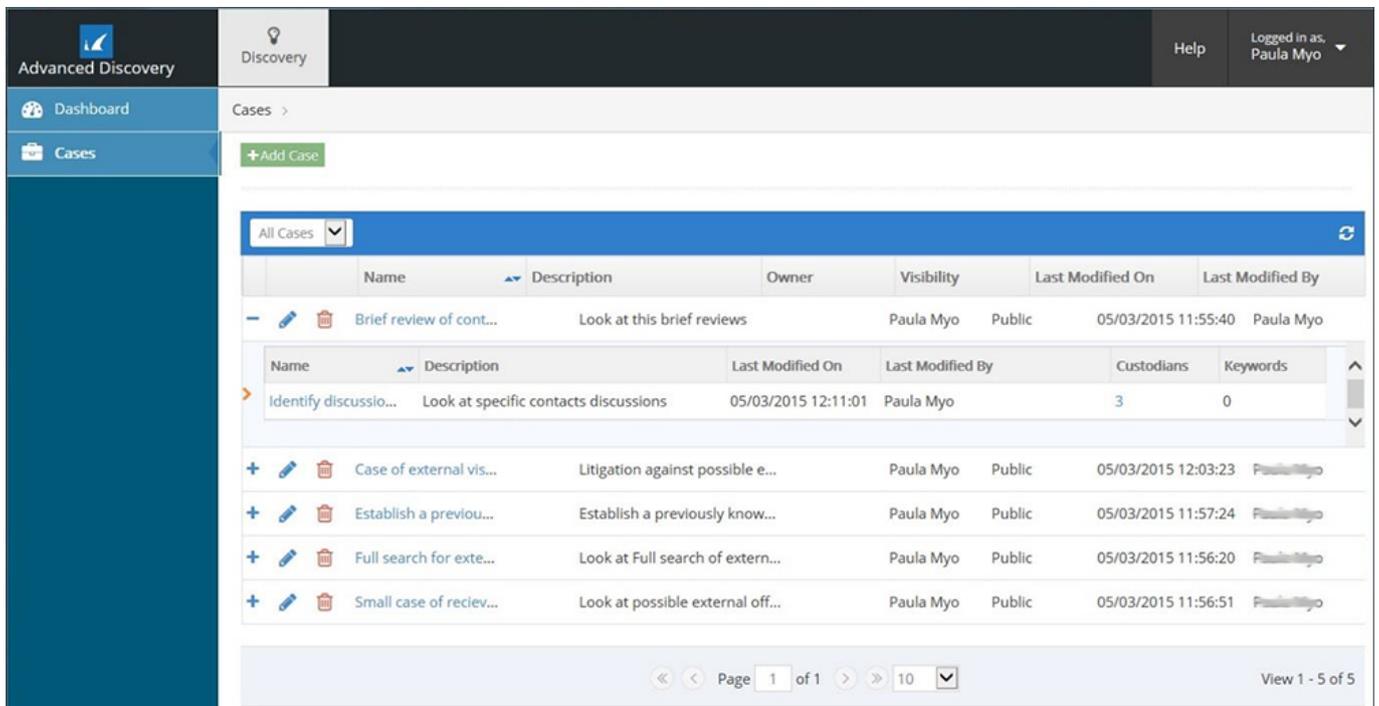


Barracuda Advanced Discovery Cases

<https://campus.barracuda.com/doc/47579308/>

This article refers to the Barracuda ArchiveOne Enterprise version 7.1. You must have access rights granted by your administrator to use Barracuda Advanced Discovery.

Click **Cases** in the left pane to view a list of cases. Click on a case name in the table to view case details, click the plus (+) icon to view a list of collections for the case, and click the collection name to view collection details:



The screenshot shows the Barracuda Advanced Discovery interface. The left sidebar has 'Cases' selected. The main area displays a table of cases with columns: Name, Description, Owner, Visibility, Last Modified On, and Last Modified By. A dropdown menu at the top of the table is set to 'All Cases'. The table contains several rows of case data, including 'Brief review of cont...', 'Identify discussio...', 'Case of external vis...', 'Establish a previou...', 'Full search for exte...', and 'Small case of reviev...'. At the bottom, there is a pagination control showing 'Page 1 of 1' and 'View 1 - 5 of 5'.

Name	Description	Owner	Visibility	Last Modified On	Last Modified By
Brief review of cont...	Look at this brief reviews	Paula Myo	Public	05/03/2015 11:55:40	Paula Myo
Identify discussio...	Look at specific contacts discussions	Paula Myo	Public	05/03/2015 12:11:01	Paula Myo
Case of external vis...	Litigation against possible e...	Paula Myo	Public	05/03/2015 12:03:23	Paula Myo
Establish a previou...	Establish a previously know...	Paula Myo	Public	05/03/2015 11:57:24	Paula Myo
Full search for exte...	Look at Full search of extern...	Paula Myo	Public	05/03/2015 11:56:20	Paula Myo
Small case of reviev...	Look at possible external off...	Paula Myo	Public	05/03/2015 11:56:51	Paula Myo

You can set case visibility as:

- **Public** – The case is visible to, and can be modified by, all users
- **Read-only** – The case is visible to all users but can only be modified by the case owner
- **Private** – The case is only visible, and can only be modified by, the case owner

You can view cases based on grouping. Use the drop-down menu at the top of the table to select how to display cases:

Note that you cases marked as **Private** by another user do not display in your case groups.

- **All** – Displays all cases

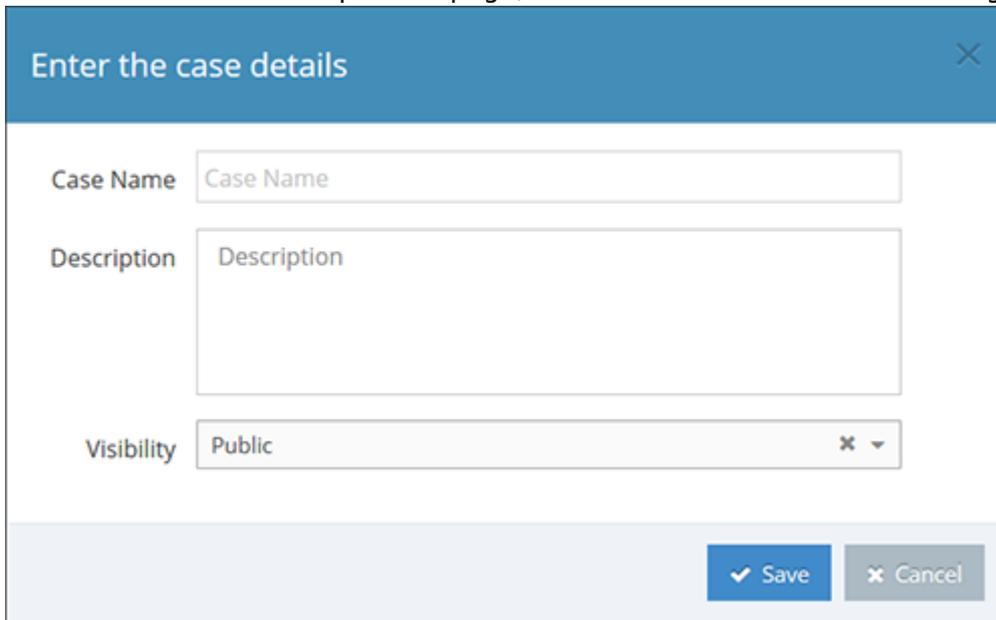
- **My** – Displays cases owned by you
- **Private** – Displays cases that are private and owned by you
- **Read-only** – Displays cases set to **Read-only**
- **Public** – Displays cases that have visibility set to **Public**

Cases

Add a Case

To add a case,

1. Click **Add Case** at the top of the page; the **Enter the case details** dialog box displays:

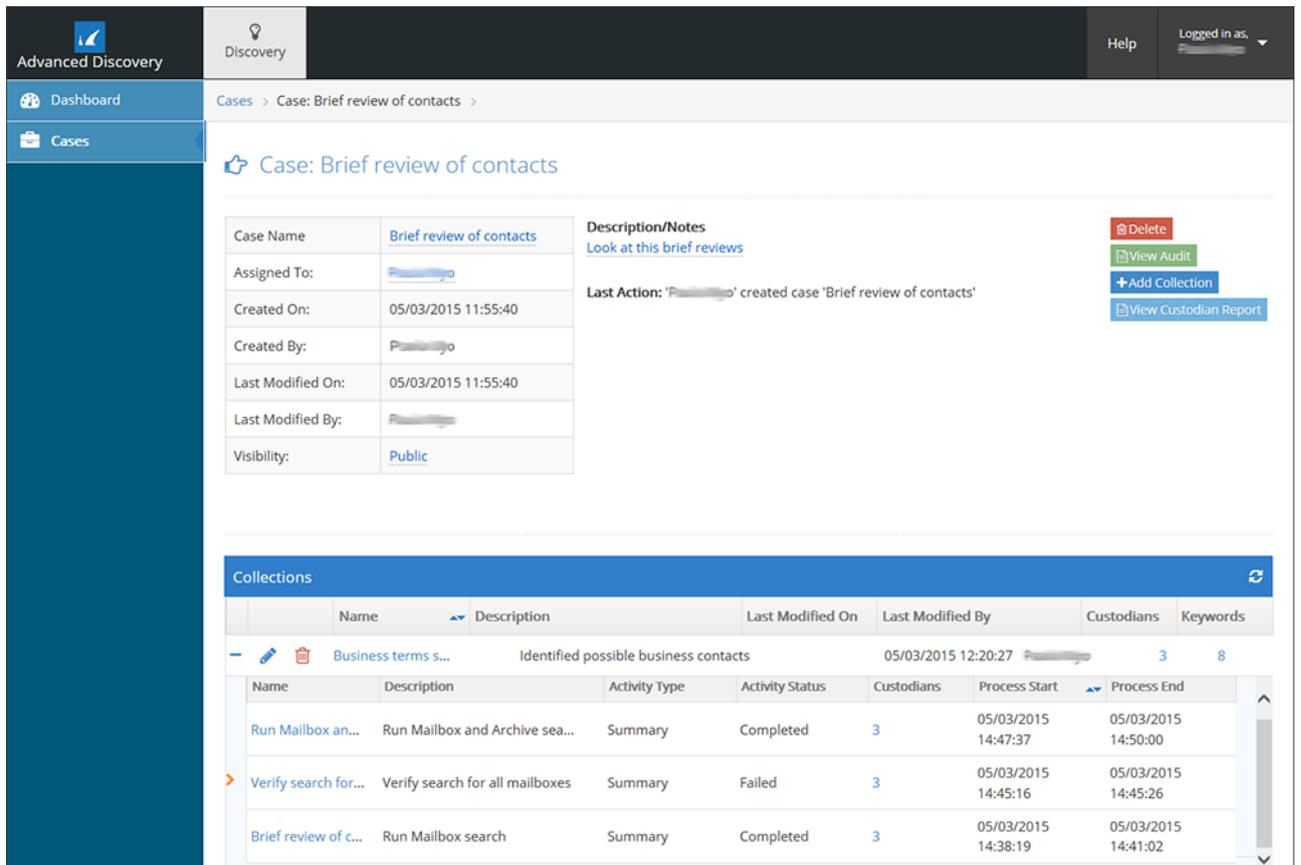


2. Enter a name to represent the case in the **Case Name** field, enter a case description, and select the case **Visibility** from the drop-down menu.
3. Click **Save**.

Edit a Case

To edit a case,

1. Click on a case name to view case details and a list of collections.
2. Click on the case field you want to edit:



The screenshot shows the 'Case: Brief review of contacts' page in the Barracuda Advanced Discovery interface. The page includes a sidebar with 'Dashboard' and 'Cases' options. The main content area displays case details in a table and a 'Collections' table below it.

Case Name	Brief review of contacts	Description/Notes	Look at this brief reviews
Assigned To:	[Redacted]	Last Action:	'[Redacted]' created case 'Brief review of contacts'
Created On:	05/03/2015 11:55:40		
Created By:	[Redacted]		
Last Modified On:	05/03/2015 11:55:40		
Last Modified By:	[Redacted]		
Visibility:	Public		

Collections						
Name	Description	Last Modified On	Last Modified By	Custodians	Keywords	
Business terms s...	Identified possible business contacts	05/03/2015 12:20:27	[Redacted]	3	8	
Name	Description	Activity Type	Activity Status	Custodians	Process Start	Process End
Run Mailbox an...	Run Mailbox and Archive sea...	Summary	Completed	3	05/03/2015 14:47:37	05/03/2015 14:50:00
Verify search for...	Verify search for all mailboxes	Summary	Failed	3	05/03/2015 14:45:16	05/03/2015 14:45:26
Brief review of c...	Run Mailbox search	Summary	Completed	3	05/03/2015 14:38:19	05/03/2015 14:41:02

Delete a Case

To delete a case,

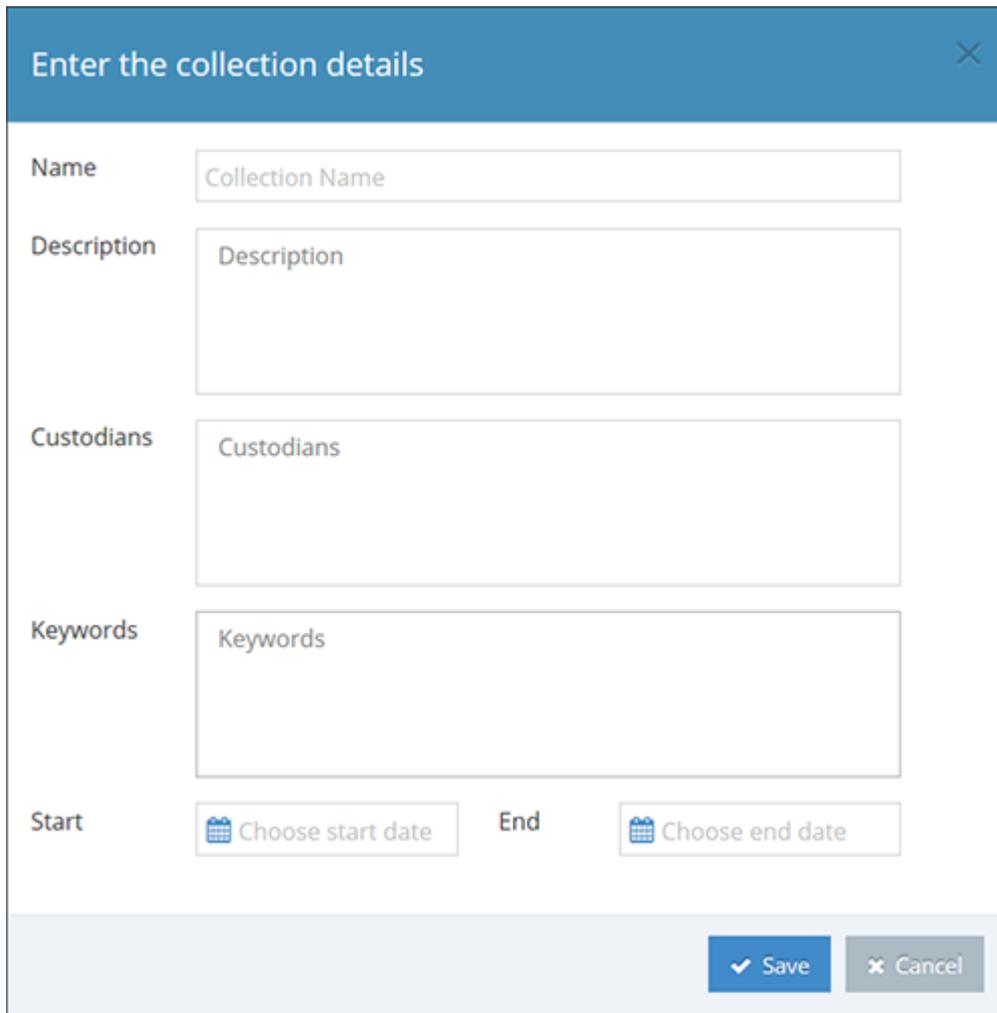
1. Select a case, and click **Delete** on the **Case Details** page.
2. Confirm you want to delete the selected case in the warning dialog.

Collections

Add a Collection

To add a collection,

1. Click **Add Collection** on the **Case Details** page.
2. The **Enter the collection details** dialog box displays:

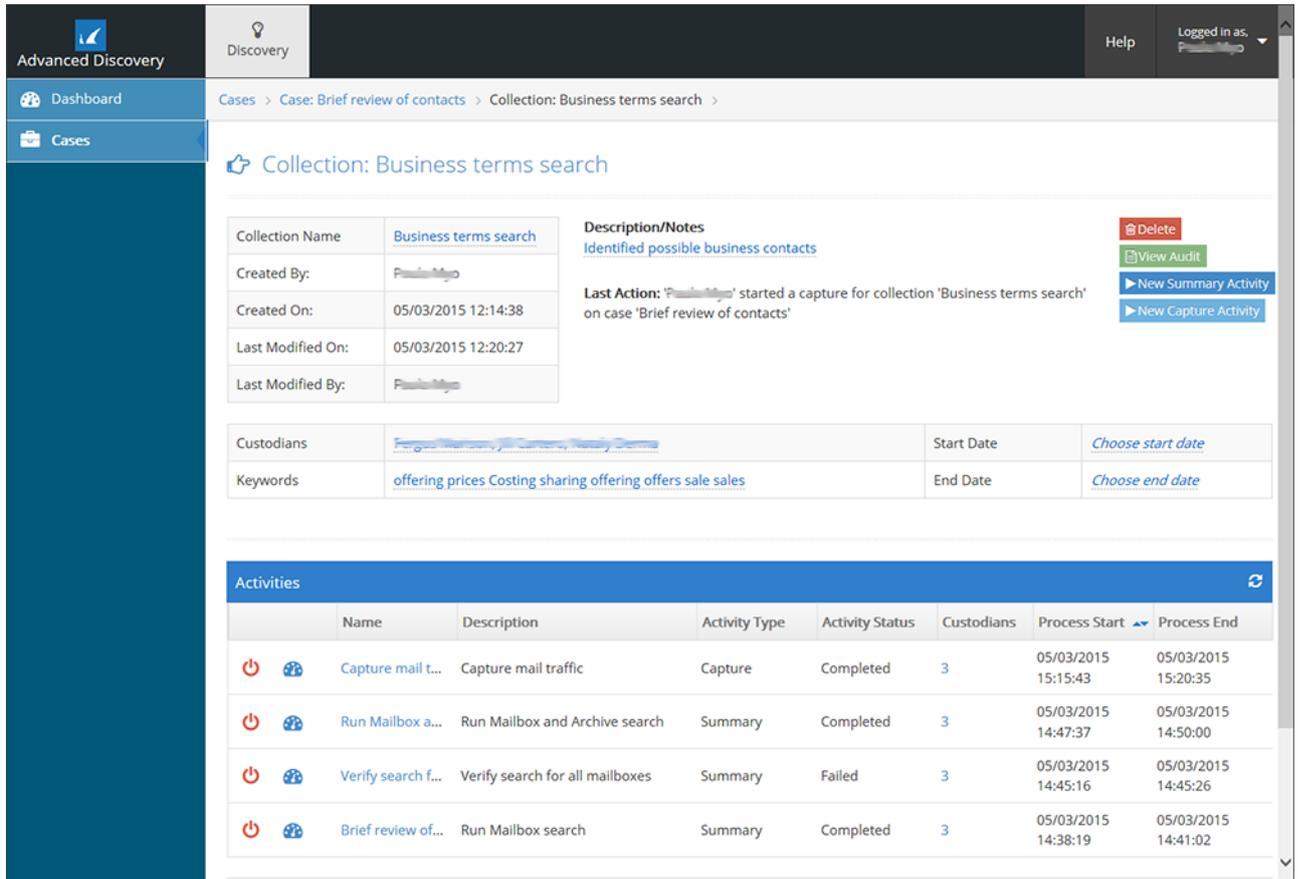


3. Enter the following details:
 - **Name** - Enter a name to identify the collection
 - **Description** - Enter a collection description
 - **Custodians** - Select custodians for the list of mailboxes
 - **Keywords**- Enter keywords to represent the collection
 - **Start/End** - Select the start and end dates
4. Click **Save** to add the collection.

Edit a Collection

To edit a collection,

1. Select a case, and then select a collection on the **Case Details** page.
2. Click on a collection field to edit the content:



Advanced Discovery | Discovery | Help | Logged in as: [User]

Dashboard | Cases > Case: Brief review of contacts > Collection: Business terms search >

Collection: Business terms search

Collection Name	Business terms search	Description/Notes	Delete
Created By:	[User]	Identified possible business contacts	View Audit
Created On:	05/03/2015 12:14:38	Last Action: [User] started a capture for collection 'Business terms search' on case 'Brief review of contacts'	New Summary Activity
Last Modified On:	05/03/2015 12:20:27		New Capture Activity
Last Modified By:	[User]		

Custodians	[User]	Start Date	Choose start date
Keywords	offering prices Costing sharing offering offers sale sales	End Date	Choose end date

Activities

	Name	Description	Activity Type	Activity Status	Custodians	Process Start	Process End
	Capture mail t...	Capture mail traffic	Capture	Completed	3	05/03/2015 15:15:43	05/03/2015 15:20:35
	Run Mailbox a...	Run Mailbox and Archive search	Summary	Completed	3	05/03/2015 14:47:37	05/03/2015 14:50:00
	Verify search f...	Verify search for all mailboxes	Summary	Failed	3	05/03/2015 14:45:16	05/03/2015 14:45:26
	Brief review of...	Run Mailbox search	Summary	Completed	3	05/03/2015 14:38:19	05/03/2015 14:41:02

Delete a Collection

To delete a collection,

1. Select a case, and select the collection you wish to delete.
2. Click **Delete** on the **Collection Details** page.
3. Confirm you want to delete the selected collection in the warning dialog.

Reports

View an Audit Report for a Case

To view the audit report for a case,

1. Select a case, and click **View Audit** on the **Case Details** page.
2. The **Audit Report** displays audit events and related objects for the selected case:

Audit Report		
Audit Report for Case: Brief review of contacts		
Report created by P... on 05/03/2015 12:31:30		
Timestamp	Action	Description
05/03/2015 11:55:40	new case	"P..." created case 'Brief review of contacts'
05/03/2015 12:11:02	new collection	"P..." created collection 'Identify discussions with specific...
05/03/2015 12:14:38	new collection	"P..." created collection 'Business terms search' on case '...
05/03/2015 12:15:08	update collection	"P..." updated collection 'Business terms search' on case ...
05/03/2015 12:18:53	update collection	"P..." updated collection 'Business terms search' on case ...
05/03/2015 12:19:04	update collection	"P..." updated collection 'Business terms search' on case ...
05/03/2015 12:19:15	update collection	"P..." updated collection 'Business terms search' on case ...
05/03/2015 12:19:29	update collection	"P..." updated collection 'Business terms search' on case ...
05/03/2015 12:20:27	update collection	"P..." updated collection 'Business terms search' on case ...
05/03/2015 12:26:30	update collection	"P..." updated collection 'Identify discussions with specifi...

<< < Page 1 of 2 > >> 10

View 1 - 10 of 13

Export Close

3. To export the report as a .csv file, click **Export**.

View an Audit Report for a Collection

To view the audit report for a collection,

1. Select a case, select a collection, and click **View Audit** on the **Collection Details** page.
2. The **Audit Report** displays audit events and related objects for the selected case.
3. To export the report as a .csv file, click **Export**.

View a Custodian Report

To view a custodian report,

1. Select a case, and click **View Custodian Report** on the **Case Details** page.
2. The **Custodian Summary Report** displays a list of collections on which a capture has been run:

Custodian Summary Report ✕

Custodian Summary Report for Case : Establish a previously know suspect
Report created by P [redacted] on 05/03/2015 16:10:10

Collection	Capture	Custodians	Message Count	Total Size
mails with key words	emails	[redacted]	272	12084KB
mails with key words	emails	[redacted]	90	1542KB
mails with key words	emails	[redacted]	16	740KB

⏪ ⏩ Page of 1 ⏪ ⏩ 10 ⏴ ⏵ View 1 - 3 of 3

Export Close

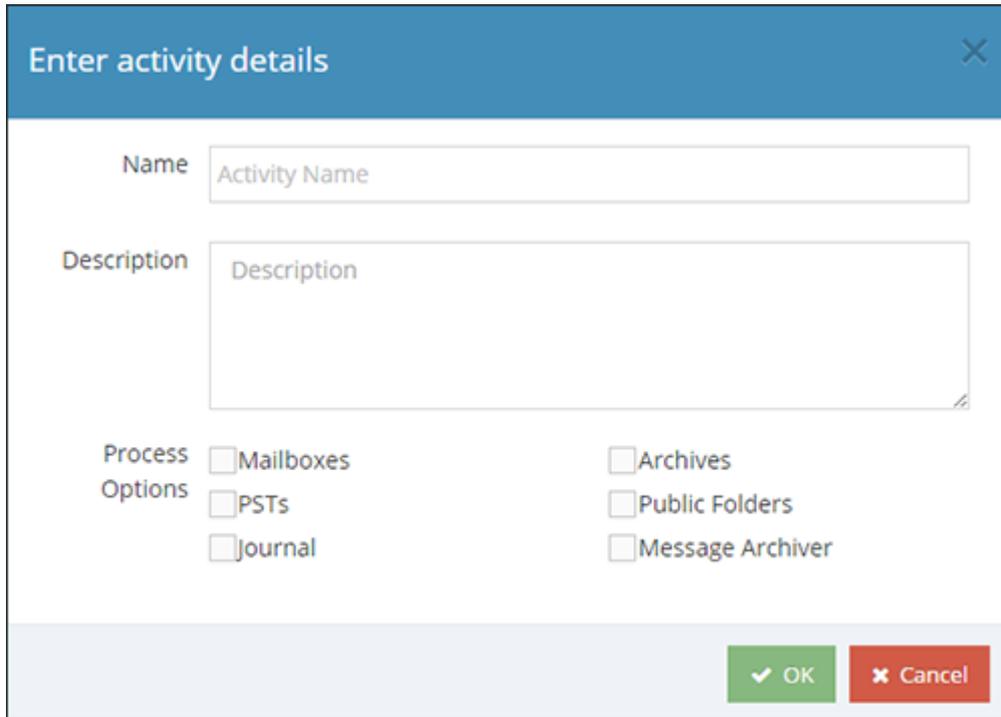
3. To export the report as a .csv file, click **Export**.

Activities

Create a Summary Activity

To start a summary activity,

1. Go to the **Collection Details** page, and click **New Summary Activity**; the **Enter activity details** dialog box displays:



2. Enter the following details:

- **Name** - Enter a name to represent the activity, or leave blank and a name is automatically generated
- **Description**- Enter a description of the activity
- **Process Options** - Select where to search for messages

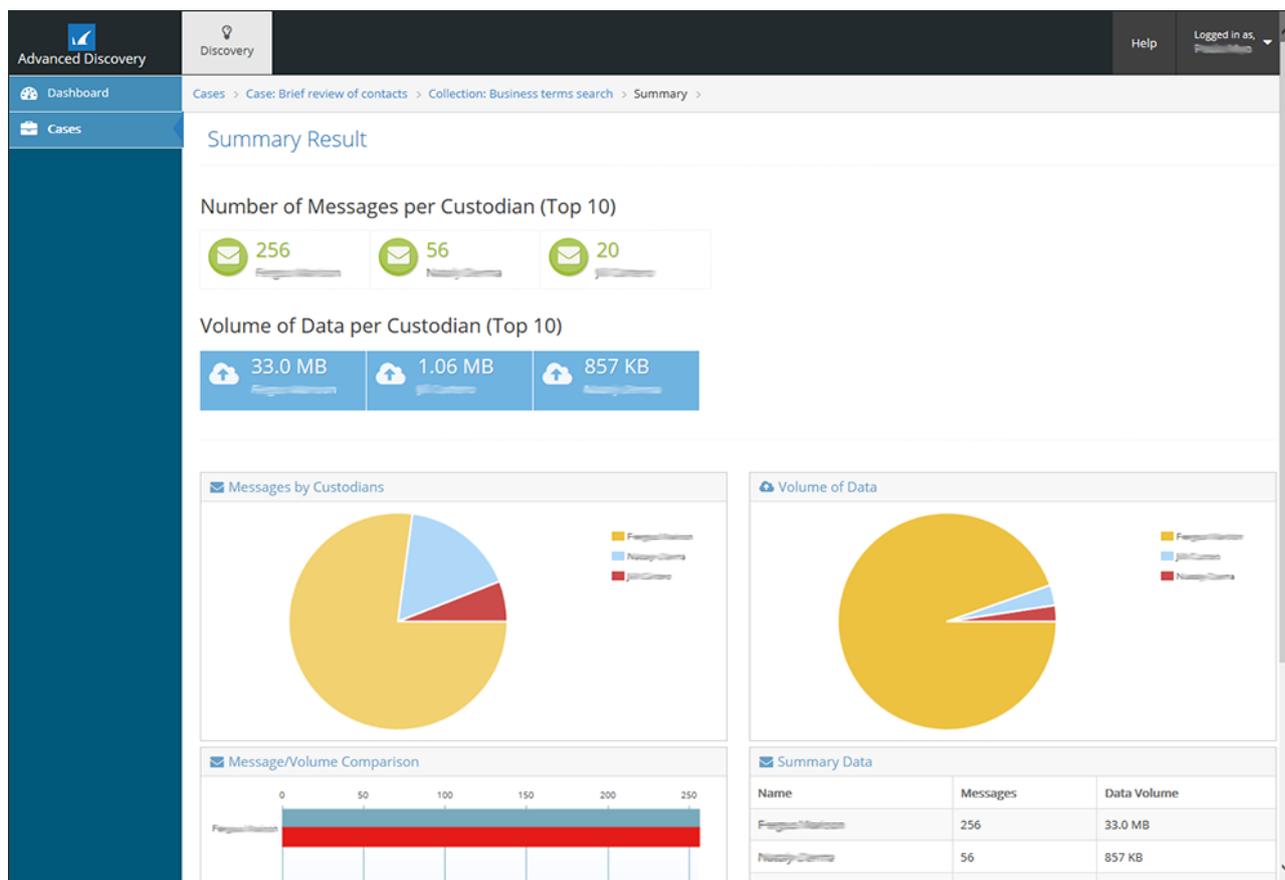
Note that the option **Message Archiver** only displays if you have added your [Barracuda Message Archiver](#) configuration details on the **BMA Search** page in the [ArchiveOne Admin System Configuration](#).

3. Click **OK** to add the summary activity.

View Summary Activity Results

To view the results of a completed summary activity,

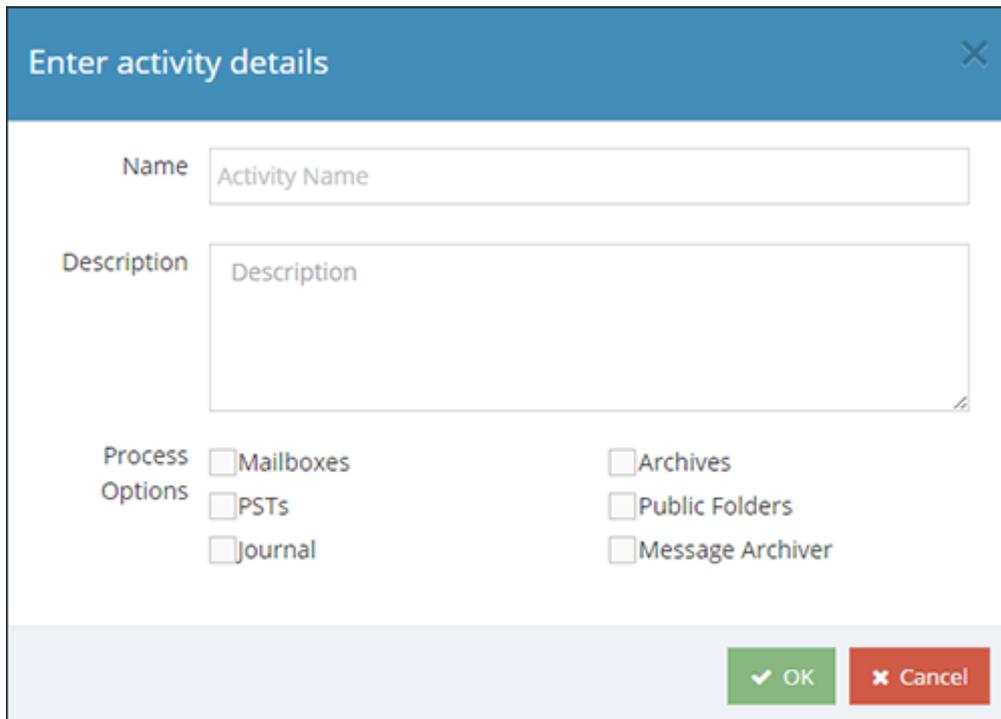
1. Once a summary activity is complete, click on the name of the activity in the **Collection Details** page.
2. The **Summary Results** displays statistics about the found messages:



Create a Capture Activity

To start a capture activity,

1. Go to the **Collection Details** page, and click **New Capture Activity**; the **Enter activity details** dialog box displays:



Enter activity details [X]

Name

Description

Process Options

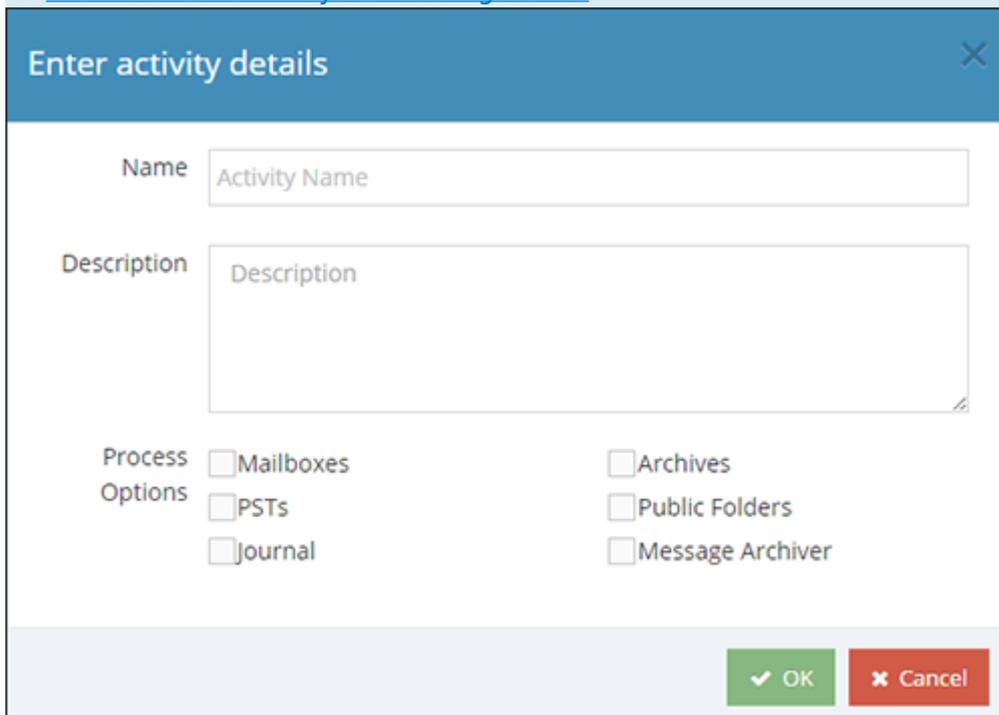
- Mailboxes
- Archives
- PSTs
- Public Folders
- Journal
- Message Archiver

[OK] [Cancel]

2. Enter the following details:

- **Name** - Enter a name to represent the activity, or leave blank and a name is automatically generated
- **Description**- Enter a description of the activity
- **Process Options** - Select where to capture messages

Note that the option **Message Archiver** only displays if you have added your [Barracuda Message Archiver](#) configuration details on the **BMA Search** page in the [ArchiveOne Admin System Configuration](#).



Enter activity details [X]

Name

Description

Process Options

- Mailboxes
- Archives
- PSTs
- Public Folders
- Journal
- Message Archiver

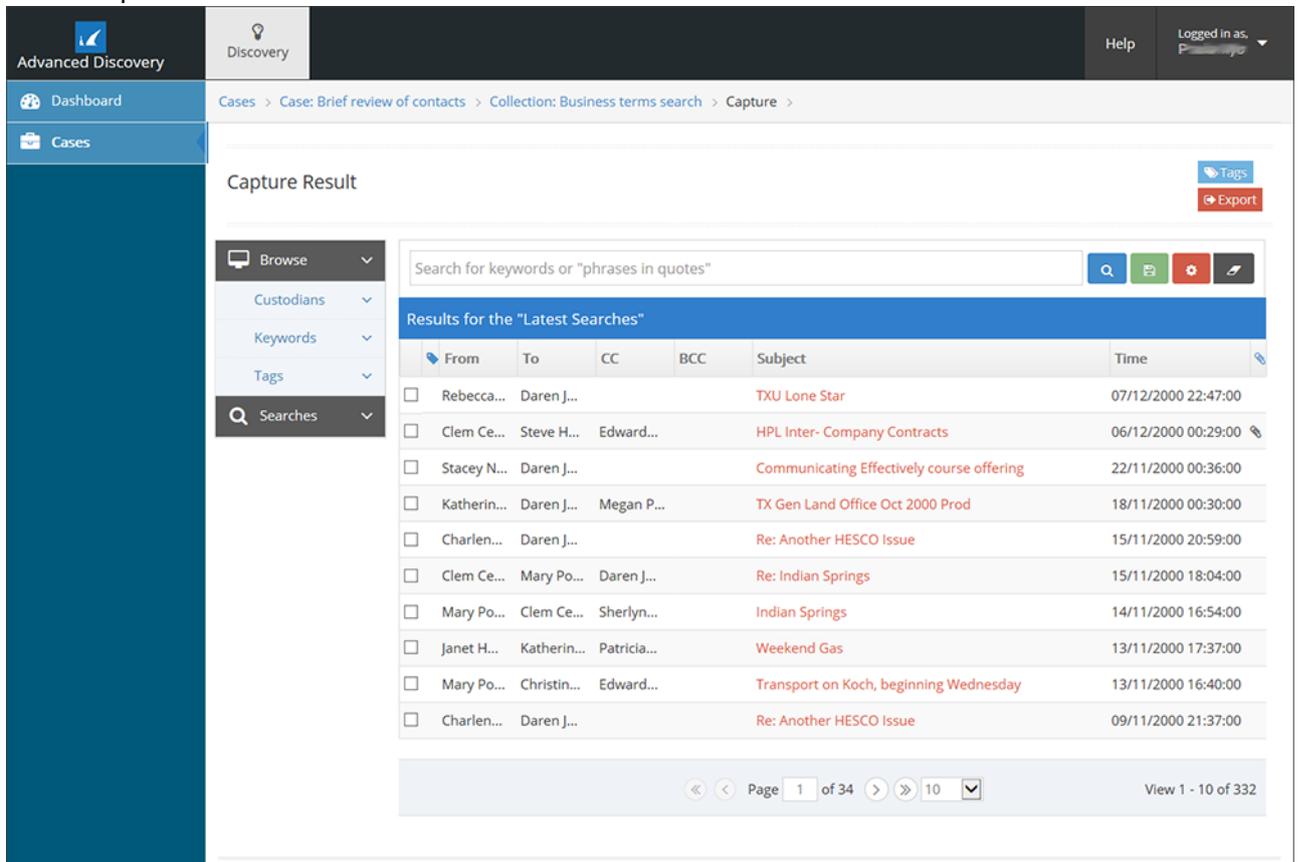
[OK] [Cancel]

3. Click **OK** to add the capture activity.

View Capture Activity Results

To view the completed capture results,

1. Once a capture activity is complete, click on the name of the activity in the **Collection Details** page.
2. The **Capture Results** displays a list of messages that were found. From this view you can by keywords, click on the subject text of a message to view message details, or use the advanced search option to further refine the list:



The screenshot shows the 'Capture Result' page in the Barracuda Advanced Discovery interface. The page has a dark blue header with 'Advanced Discovery' and 'Discovery' tabs. A breadcrumb trail reads 'Cases > Case: Brief review of contacts > Collection: Business terms search > Capture'. On the left, there is a sidebar with 'Cases' selected. The main content area is titled 'Capture Result' and features a search bar with the placeholder 'Search for keywords or "phrases in quotes"'. Below the search bar, there is a table of results for the 'Latest Searches'.

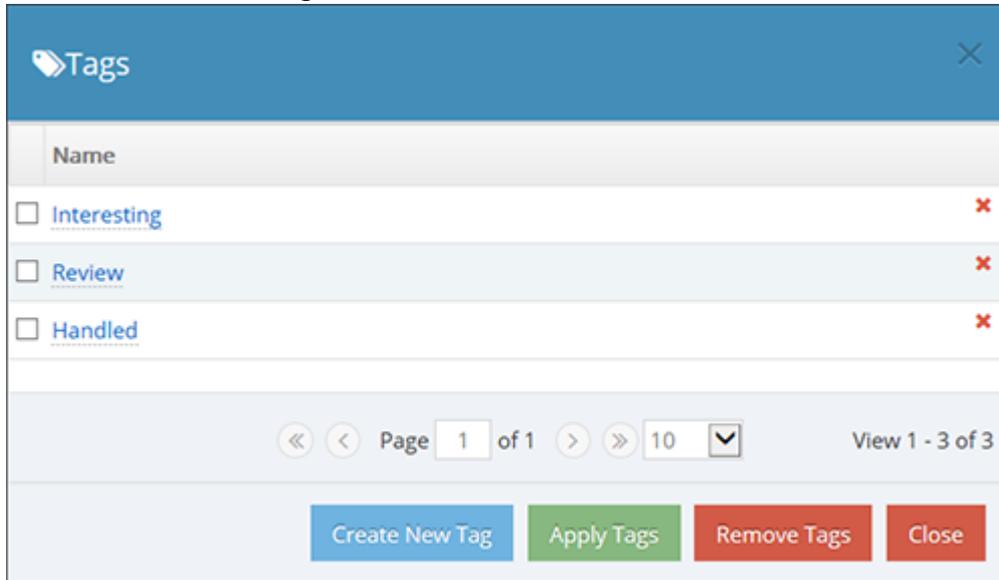
	From	To	CC	BCC	Subject	Time
<input type="checkbox"/>	Rebecca...	Daren J...			TXU Lone Star	07/12/2000 22:47:00
<input type="checkbox"/>	Clem Ce...	Steve H...	Edward...		HPL Inter- Company Contracts	06/12/2000 00:29:00
<input type="checkbox"/>	Stacey N...	Daren J...			Communicating Effectively course offering	22/11/2000 00:36:00
<input type="checkbox"/>	Katherin...	Daren J...	Megan P...		TX Gen Land Office Oct 2000 Prod	18/11/2000 00:30:00
<input type="checkbox"/>	Charlen...	Daren J...			Re: Another HESCO Issue	15/11/2000 20:59:00
<input type="checkbox"/>	Clem Ce...	Mary Po...	Daren J...		Re: Indian Springs	15/11/2000 18:04:00
<input type="checkbox"/>	Mary Po...	Clem Ce...	Sherlyn...		Indian Springs	14/11/2000 16:54:00
<input type="checkbox"/>	Janet H...	Katherin...	Patricia...		Weekend Gas	13/11/2000 17:37:00
<input type="checkbox"/>	Mary Po...	Christin...	Edward...		Transport on Koch, beginning Wednesday	13/11/2000 16:40:00
<input type="checkbox"/>	Charlen...	Daren J...			Re: Another HESCO Issue	09/11/2000 21:37:00

At the bottom of the results table, there is a pagination control showing 'Page 1 of 34' and a 'View 1 - 10 of 332' indicator.

Filter Capture Activity Results

- Click **Browse** to filter the list by predefined criteria:
 - **Custodians** - Displays all custodians in the capture. Select one custodian to filter results so that only messages relating to that custodian display.
 - **Keywords** - Displays all keyword used in the capture. Select a keyword to filter the results so that only messages relating to that keyword display.
 - **Tags** - Displays all tags applied to the capture. Select one tag to filter the results so that only messages relating to that tag display

- Click **Search** and select a saved search on which to filter the list of messages.
- Click **Tags** to organize messages based on tags; create, modify, or delete a tag, or apply a tag to one or more messages:

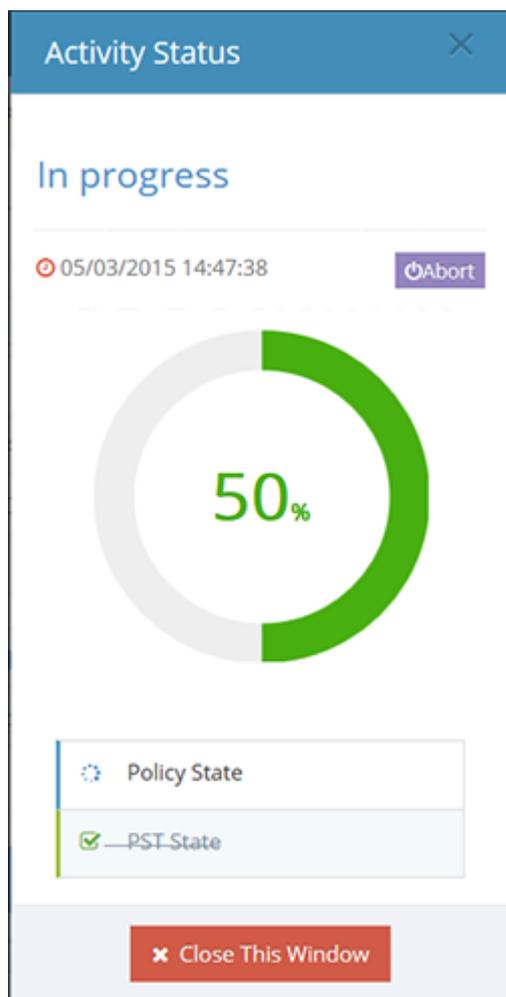


- **Export** - Click to select one or more messages to export to a PST file. The exported file is written to a shared folder configured by your system administrator.

View or Abort a Running Activity

To view activity status,

1. Click the **Status** (🌐) icon in the activities list to view the status of the running activity:



2. Click **Abort** if you wish to stop the activity in progress, or click **Close This Window** to allow the activity to complete.

Figures

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