

GWAVA Inc.

GWAVA® Retain™

For GroupWise®

Retain Publisher and Viewer

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Retain Publisher and Viewer

Retain comes with the ability to export selected messages to a local archive for searching and viewing or to fulfill the need of a mobile archive for legal compliance. This can be extremely useful for larger systems or systems which have a high load, and where the need for review or legal compliance is being exercised, but access to the entire Retain archive is not necessary. Instead of allowing or facilitating constant access to the entire Retain Server, the Publisher can export and index groups of messages to a local archive, and the Viewer can search, view, and forward messages from the local archive.

The process is performed in two parts: the Publisher and the Viewer. The publisher, using an existing account with mail export rights, connects to the Retain Server and exports the messages complying with the search request, and creates a local database archive on the host machine. The viewer accesses the local archive and allows browsing, searching, and message exportation from the local archive.

Requirements:

- Network connection to Retain Server
- .Net 3.5 SP1
- Windows XP, Vista, 7, 2003, or 2008. (32-bit or 64-bit)
- > PST migration requires MS Office or Outlook installed. (32 and 64-bit systems are supported.)
- Retain user with rights to export mail
 (See User management in the Retain Administration Guide)

The Viewer can be run or be installed as stand-alone client wherever a published archive exists, but it is recommended to install the Viewer when you install the Publisher. While the Viewer and Publisher can be installed and run separately, the Viewer must have direct access to the published archive. Do not place the published archive on a network share. Accessing the published database from a remote machine may cause instability and is insecure. For this reason, it is best to use the Viewer local to the published archive.

The install files are located in the extracted Retain install sources tools folder.

.../retain/tools/publisher

Run the installers on the desired machine.



Retain Publisher Install

The Retain Publisher installation is very similar to the Viewer installation. Basic questions are asked, and the installer checks for .NET 3.5 SP1 before copying or installing any files. Click 'Next' to continue.

The installer checks for any programs that need to be closed for installation. Close any applications specified and click 'Next'.



Because the Publisher is worthless without the Viewer, the Publisher installation provides the option to install the viewer alongside the publisher. If the viewer has already been installed, this is not necessary. It is recommended to have both the viewer and the publisher on the same machine. Select the desired setting and click 'Next' to continue.

Select the install location. The default is shown. If the default location does not work for the system, browse to, or specify the desired install location.



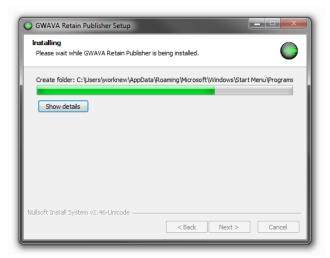
Read and accept the license agreement. Select 'Next' to continue.

| GWAVA Retain Pu | nts | | | | |
|--|---|---|----------------|---|------------------|
| Choose which feat | res of GWAVA | Retain Publish | er you want to | install. | |
| Check the compone install. Click Next to | | to install and ur | ncheck the com | ponents you dor | n't want to |
| Select components | | ✓ Publisher & ✓ Viewer | Indexer | Description Position you over a comp see its descr | onent to |
| Space required: 27 | 7MB | | | | |
| Nullsoft Install System | v2.46-Unicode | | | | |
| | | | | | |
| | | ſ | < Back | Next > | Cancel |
| | | | < Back | Next > | Cancel |
| | _ | | < Back | Next > | Cancel |
| GWAVA Patain Du | blicher Setur | | < Back | | Cancel |
| GWAVA Retain Pu | | (| < Back | | |
| GWAVA Retain Pu Choose Install Loc Choose the folder in | ation | | | | |
| Choose Install Loc | ation which to insta AVA Retain Pu | all GWAVA Reta | ain Publisher. | | - |
| Choose Install Loc Choose the folder in Setup will install GW | ation which to insta AVA Retain Pu | all GWAVA Reta | ain Publisher. | | - |
| Choose Install Loc Choose the folder in Setup will install GW click Browse and sel | ation which to insta AVA Retain Pu cct another fol | all GWAVA Reta | ain Publisher. | . To install in a d | - |
| Choose Install Loc Choose the folder in Setup will install GW click Browse and sel | ation which to insta AVA Retain Pu ct another fol | all GWAVA Reta | ain Publisher. | . To install in a d | ifferent folder, |
| Choose Install Loc Choose the folder in Setup will install GW click Browse and sele Destination Folder | ation which to insta AVA Retain Pu AVA RETAIN AVA RETAINA AVA RETAINA AV | all GWAVA Reta blisher in the f Ider. Click Nex | ain Publisher. | . To install in a d | ifferent folder, |

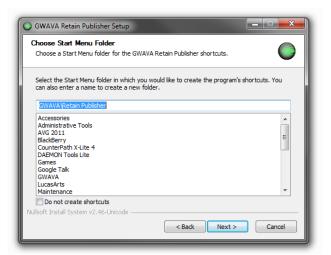
Select where to place start menu shortcuts, or select the 'Do not create shortcuts' option to keep the installer from creating any shortcuts in the start menu.

Select the desired desktop shortcut configuration. The installer can create Desktop or Quick Launch icons if desired. Default is shown

Select 'Install' to copy the program files and install the Publisher.



After the files have been copied, select 'Finish', completing the installation.







Retain Viewer Install

The Installation wizard goes through the general questions and checks for the required .NET 3.5 SP1 to be installed.

Click 'Next' to continue.

The install checks for any running programs that need to be shut down. Shutdown any needed applications and click 'Next'.

Read the license agreement and accept.

Click 'Next' to continue

Select the install location. The default is shown, but if the default does not work for your system, browse to, or specify the new path and click 'Next' to continue.

Decide where to place the start menu shortcuts, and whether you wish shortcuts to be created. If you wish to not have shortcuts created, select the 'Do not create shortcuts' option.

Click 'Next' to continue.



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< Back Next > Cancel

The installer checks all running programs for any possible conflicts and alerts if any programs need to be closed. Click 'Next' to continue.

The installer then asks whether you wish to have a Desktop shortcut created, and whether to add Quick Launch icons.

Select the desired settings and select 'Install'. If .NET is present on the system, the install will proceed and you may finish and complete the installation.

At this point, the install wizard checks for .NET 3.5 SP1. If it is not installed, or it is an older version of Windows, the Publisher and Viewer installers will prompt you to install .NET 3.5 SP1. An internet connection is required for this installation. If you decline to install .NET 3.5, the install will

fail and exit. The install may require a system restart.

If you select to install .NET 3.5 SP 1, the correct install package will be downloaded from the internet.



After the package is downloaded, the .NET installer will run.

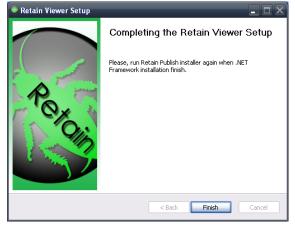
Read and accept the license agreement and follow the install to the end.

| Microsoft .NET Framework 3 | .5 SP1 Setup |
|----------------------------------|-------------------------------|
| You must restart your computer I | to complete the installation. |
| | |
| | |
| Restart Now | Restart Later |

To complete the install, you must restart your system.

Once the system has been restarted to complete the .NET 3.5 SP1 install, the Retain Viewer or Publisher installation must be restarted.

| 👼 Microsoft .NET Framewor | k 3.5 SP1 Setup | _ | _ 🗆 🔀 |
|---|--------------------------|-------------------|--------|
| Welcome to Setup | | net Fram | ework |
| Be sure to carefully read and unde license terms. You must accept the | | | |
| | | | |
| MICROSOFT SOF | TWARE SUP | PLEMENTAL | ~ |
| Press the Page Down key to see m | iore text. | | Print |
| ◯ I have read and ACCEPT the te | erms of the License Agre | ement | |
| ○ I DO NOT ACCEPT the terms of | the License Agreement | | |
| Send information about my set Details regarding the <u>data collection</u> | | soft Corporation. | |
| Download File Size: | 52 MB | | |
| Download Time Estimate: | 2 hr 9 min (56 kbps) | | |
| | 14 min (512 kbps) | | |
| | | Install > | Cancel |
| | | | |



If you previously ran the installer, but had to abort to install .NET, you will need to re-enter your settings.

| GWAVA Retain Publisher S | etup 📃 🗖 🗮 🗮 | Retain Viewer Setup |
|--------------------------|--|---|
| | Welcome to the GWAVA Retain Publisher Setup | Installing Please wait while Retain Viewer is being installed. |
| Peroin | Setup will guide you through the installation of GWAVA Retain Publisher. It is recommended that you close all other applications before starting Setup. This will make it possible to update relevant system files without having to reboot your computer. Click Next to continue. | Create folder: C: Users/worknew/AppData/Roaming/Microsoft/Windows/Start Menu/Programs |
| | Next > Cancel | Nullsoft Install System v2.46-Unicode |

After the installation has finished, select 'Finish', completing the setup.

| Retain Viewer Setup | |
|---------------------|--|
| | Completing the Retain Viewer Setup |
| Peroin | Retain Viewer has been installed on your computer. Click Finish to close Setup. |
| | < Back Finish Cancel |

Retain Publisher

The Retain Publisher must be run to create the local archive for the Viewer to connect to. The Publisher does not display messages, it just accesses and exports messages into a portable message archive.

The Publisher must be used in conjunction with a user that has administrator rights to publish messages. Because the Publisher connects over the network, it requires an open network connection to the Retain Server.

The Administrator account for Retain automatically has the publish

messages right, and can be used here, though it is highly recommended to create and use an auditor account with the mail export right and access to the desired mailboxes or post offices required.

Input the Retain Server's DNS or IP Address and the login for the account with message export rights and rights to the desired mailboxes. Unless the login account has the administrator level right to 'search all mailboxes', only the mailboxes granted to the auditor account will be accessible. Granting rights to mailboxes other than the active

| Core Settings | User Rights | Mailboxes | Miscellaneous |
|------------------------------------|------------------------------------|----------------------------------|--|
| Mailboxes | | | |
| only view messa to forward/dele | ages addressed te messages if i | to these e-ma given rights. A | rimary mailbox that the user may access. A non-admin user will al addresses (and to their primary mailbox), and might be able un admin with <i>Search All Mailboxes</i> rights can access all Search Interface. |
| Currently Se | elected | | |
| 样 Bastula | 1 | | |
| 样 mastor | n | | |
| | | | |
| Criteria First Name | begins w | | M Search |
| Show only us Add Select | | only recently c | cached items 🔽 |

Hear Rights

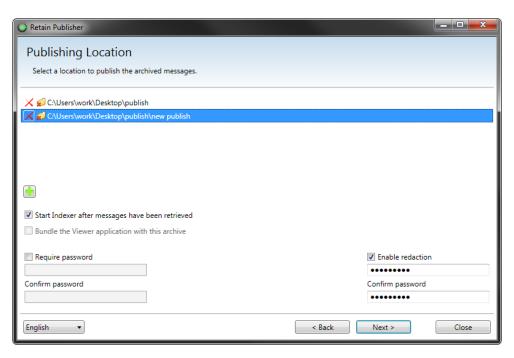
user's own mailbox are specified in the user rights section, under the 'mailboxes' tab. (The advanced view provides a protocol and port options.)

| Retain Publishing Wizard | i | | |
|--------------------------|----------------|----------------------------------|----------|
| Retain Server | | account with rights to publish m | essages. |
| | Server Address | | |
| | Username | Password | |
| | Save usernam | e and password | |
| | | | |
| | | | |
| Advanced View | | | |
| English 🗸 | | | Next > |

| User Rights |
|---|
| Rights explicitly granted to the user. |
| Administrator level rights |
| Access all audit logs |
| Deletion Manager |
| Apply or remove litigation hold |
| 🗌 Manage Server |
| Manage Users and Groups |
| 🗌 Manage Workers, Schedules, Profiles, Jobs |
| Publish Messages |
| Restore messages [Any Mailbox] |
| Search all mailhoves |

Select 'Next' to login to the Retain Server.

The Publisher then asks for the desired location for the exported archive messages. The messages extracted from the Retain Server will be saved in a database at this location. Select an existing location or select the green plus button and then browse to, or create a new folder for the published archive destination.



The options to password protect and use Redaction, both require passwords. To use them, select the checkbox and specify a password. The passwords can be different and both options may be present on the same archive.

When the 'Bundle the Viewer application with this archive' option is selected, the Viewer installation file is copied into the archive as well, preparing it to be completely mobile; the entire destination folder can then be copied or sent to any system with all that is required to read and search the archive. If the archive is to be distributed on a burned DVD or CD, further redaction will not function from the disk. All redaction comments should either be made before the archive is burned to a disk, or the archive should be copied from the disk to a local location where changes can be saved. When writing the archive to a read-only medium, it is always prudent to finalize the compilation.

Making the archive mobile can be very useful in situations where direct access to the Retain archive, such as during legal discovery, when email information is required to be surrendered for a user or group of users, an archive can be created and provided without disrupting current Retain operation. Click 'Next' to continue.

| 🔾 Retain Publisher | | |
|---|---------------|-------|
| Address Book | | |
| Choose the domains, post offices, and mailboxes to publish. | | |
| Dredge from Exchange journaling mailbox | | |
| ▲ □ () dom | | |
| Р 🖉 🎯 ро | | |
| | | |
| English • | < Back Next > | Close |

Select the scope of the export job. Single or multiple users, mail boxes, message servers, domains, and social media, even crossing message systems, may be added or excluded from any export job. Select 'Next' to continue.

| O Retain Publisher | |
|---|--|
| Query Form Please select query for filtering data. | |
| ✓ Use custom query | |
| Queries | Query Parameters |
| New simple query | ○ Core |
| New advanced query | Search phrase: Operator: Contains Scope |
| English • | < Back Next > Close |

The Publisher may restrict what mail or items are published into the message archive by specifying search or query terms. If a message or item does not apply to the search terms, it will not be added to the published archive. There are three opportunities to specify search terms or criteria; Core (query), Scope, and Misc.

Each of the three different criteria areas at this step may be shown or hidden by clicking on the hide/show arrow. Select the 'Use custom query' and either the simple or advanced query options to enter search criteria. Previously saved searches or searches that have been shared with the logged-in user will be displayed in the queries menu. If the 'Use custom query' box is not checked the query parameters will remain locked and cannot be manipulated.

To add criteria to the Core query parameters, simply select the green '+' icon, then select the different desired operator, search type, and phrase.

For instance, a very exclusive 'contains' search of the message contents will only publish messages that have the exact specified word or phrase in them. Fuzzy searches for approximates to the specified phrase, producing results including the words, but not in the specific order, or similar words.

The Scope details what types of messages will be searched for. If no items are checked, all are allowed, and that setting is default. To restrict to specific messages and types, (some are mail system specific), at least one item must be selected. If one item is selected, or something is desired to be excluded from the published archive, select all desired item types. The Item Type, Item Source, and Attachment size, are all independent factors and must be specified independently or left blank. A blank item source and attachment size will not restrict those criteria when combined with a specified type.

| Retain Publisher | |
|---|---|
| Query Form | |
| Please select query for filtering data. | |
| | |
| Use custom query | |
| Queries | Query Parameters |
| | ○ Core |
| New simple query New advanced query | Search Terms |
| | Search Type Operator Search Phrase |
| | GW Domain 👻 Contains 💌 |
| | GW Domain Message Contents |
| | Attachment Name Sender (email) |
| | Internet Header GW Post Office |
| | 📀 S Recip. Domain |
| | Recipient Sender (display) |
| | Sender Domain Subject |
| | |
| English | < Back Next > Close |
| | |
| Retain Publisher | |
| | |
| Query Form | |
| Please select query for filtering data. | |
| | |
| Use custom query | |
| Use custom query | |
| Use custom query Queries | Query Parameters |
| | ♥ Core |
| Queries | ⊙ Core ⊙ Scope |
| Queries New simple query | ♥ Core |
| Queries New simple query | ◇ Core ◇ Scope Item Type Leave unselected to search all types ☑ Mail ☑ Appointment |
| Queries New simple query | ◇ Core ◇ Scope Item Type Leave unselected to search all types |
| Queries New simple query | ◇ Core ◇ Scope Item Type Leave unselected to search all types ☑ Mail ☑ Appointment ☑ Note ☑ Task ☑ Phone Message |
| Queries New simple query | Core Core Core Cope Item Type Leave unselected to search all types Mail Appointment Note Phone Message Item Source Leave unselected to search all sources |
| Queries New simple query | ✓ Core ✓ Scope Item Type Leave unselected to search all types ✓ Mail △ Appointment ○ Note □ Task ○ Phone Message Item Source Leave unselected to search all sources ○ Unknown □ Received |
| Queries New simple query | Core Core Core Cope Item Type Leave unselected to search all types Mail Appointment Note Phone Message Item Source Leave unselected to search all sources |
| Queries New simple query | ✓ Core ✓ Scope Item Type Leave unselected to search all types ✓ Mail Appointment Note Task Phone Message Item Source Leave unselected to search all sources Unknown Received Sent Personal Draft Journaled |
| Queries New simple query | ✓ Core ✓ Scope Item Type Leave unselected to search all types ✓ Mail △ Appointment ○ Note □ Task ○ Phone Message Item Source Leave unselected to search all sources ○ Unknown ○ Received ○ Sent ○ Personal ○ Draft ○ Journaled |

Attachment sizes can be restricted or allowed into the message archive, and are acessible through the drop-down menu at the bottom of the query screen, under the 'Attachment Size' menu.

Simply selecting the desired setting will make it active in the search criteria. Set as desired and continue.

| 🔾 Retain Publisher |
|---|
| Folder Structure |
| Select options for retrieving folder structure. |
| |
| Folder Structure: |
| Non-empty folders |
| All folders |
| |
| English |

The publisher can also be restricted to exclude all empty

folders from the published archive. Select as desired and click 'next'

The Date Range allows for specific item date ranges to be selected or excluded. The query will cause the publisher to only look for the specific mail required within the specified time frame.

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Any

<100 KB >100 KB,<1 MB

>100 MB

>1 MB,<10 MB >10 MB,<100 MB The time range may have a start date, and end date, or both.

This setting differs from the following time restriction in that the start and end times may be specified in a range, instead of a specific hard date. Only messages strictly adhering to the range will be published. If a date range is desired, enable the date range and select the desired range.

A date range is required to be specified if the active query is anything other than a previously saved

Retain Publisher

Microsoft Office

🔺 📝 Adobe

Indexer Filter Settings

C# code file (*.cs) Log file (*.log)

HTML file (*.htm) ASP.NET 1.1 page (*.asp)

•

English

Configuration file (*.ini) HTML file (*.html) HTML file (*.html)

Configuration file of .NET (*.config)

query, so make sure it is set to an acceptable window for the desired data. The publisher automatically defaults the date range to one year.

Click on the 'From' or 'To' dates to reveal the data selection calendar and specify the date as desired.

Click 'Next' to continue.

The Publisher can create and index the archive for

faster searching and browsing by the Viewer. It is highly recommended to index a published archive. All default filters are shown. Click 'Next' to continue.

If previously published messages are present in the selected publish location then you will be presented the option to overwrite the present information, or to append the new messages to the existing message store.

The Publisher will connect to the Retain Server and export the qualifying messages from the selected user(s) mailboxes and builds the local archive.

| Overwrite | - - × | J |
|---|--------------|---|
| Previously published information already exists here. Do you want to replace it or append to it? | | |
| Replace Append | Cancel | |

< Back Next >

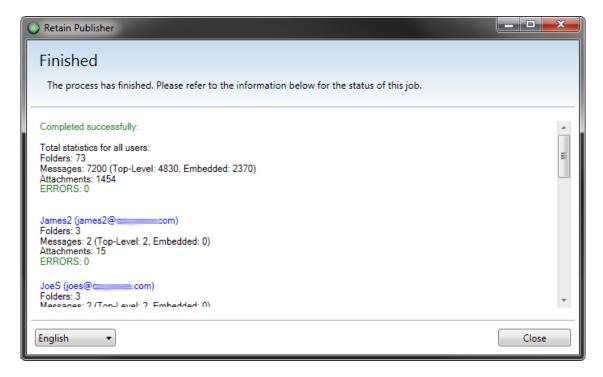
| The following document types will be indexed using IFilters. Additional filters may be installed using the links provided. |
|--|
| Microsoft Office |
| Document Word 97-2003 (*.doc) |
| Document Word 2007 (*.docx) |
| Book Excel 97-2003 (*.xls) |
| Book Excel 2007 (*.xlsx) |
| Adobe |
| Portable Document Format (*.pdf) (See manual) |
| Text document |
| Rich Text Format (*.rtf) |
| ✓ Text Document (*.txt) |

Retain Publisher _ **D** X Date Range If desired, you may publish messages from a specific time period. Filter items by creation date (creation date range is required if any query is selected): From 15 To 15 . April, 2013 ۲ Su Mo Tu We Th Fr Sa 31 1 2 3 4 5 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 1 5 6 7 8 2 10 11 English < Back Next > Close

Close

| O Retain Publisher | | | |
|--|------------------|---------------|-------|
| Please Wait | | | |
| Messages are being retrieved from Retain Serve | er. | | |
| | | | |
| Getting folders | | | |
| Saving request number 12 | | | |
| admin (admin.po.dom) | Jo 🖂 o 🖉 o | | |
| Rush (benjamin.po.dom) | ∭ 0 ⊠0 🖉0 | | |
| Bassett (david.po.dom) | ∭ 0 ⊠0 🖉0 | | |
| Clements (sam.po.dom) | ∭ 0 ⊠0 Ø0 | | |
| | | | |
| English | | < Back Next > | Close |

When the Publisher is done, it will display a report on the job. Depending on whether the exported archive was selected to be indexed after the job is done, the indexer will run. A .net error may occur at the end of Indexing, caused by an error in Adobe iFilter, if this error occurs, please install Adobe PDF iFilter 5.0 found on Adobe's web site.



Select 'Close' to exit the publishing wizard and the indexer will automatically run if that option was selected. With a successful publishing job, the archive is now ready to be connected to the Viewer.

If the Indexer was not automatically run, it must be run before the Viewer can search the archive.

Retain Viewer

To connect to the published archive, locate the shortcut to the installed Retain Viewer and start the Viewer.



The viewer must be pointed to a valid database on initial startup. If the viewer does not prompt for the location to a published database, or if a new database is desired, select the 'Open' button and browse to and select the containing folder. If the Viewer has been previously opened, it will remember the last database opened.

The viewer is setup similar to an email client, with the mailbox and account on the left, the selected account's contents fill the space on the top right, and any selected message's contents are displayed

| Viewer - published archive | _ | | | _ 0 _ X |
|----------------------------|---|---------------------|---------|----------------|
| | | ST PDF Export to | | |
| Mailbox | • | | | |
| | From | То | Subject | Date |
| | in test. 😽 Save - 👒 Porward - 🚕 Print aka | | | |
| From: To: | | Date: | | |
| Subject: | | | | |
| | | | | * |

along the bottom. Tabs allow access to the message properties or text, and highlighted buttons below the tabs determine what is shown and how, (Attachments, HTML, Plain Text). The Viewer also has the ability to forward the selected message out of the portable archive to any specified address.

To access an archive, select the 'open' button from the top toolbar, or select the 'Open' option from the 'File' dropdown menu.

| • | |
|---------|---|
| Open | Recent archives: 1. published archive |
| About | C:\Users\worknew\Desktop\published archiv 🔨 |
| Options | |
| 🐳 Exit | |
| 1 | |

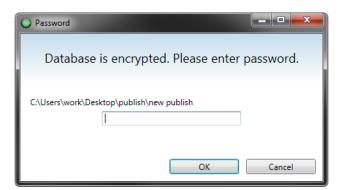
The Viewer only needs to know the base location of the archive, or the folder selected in the Publisher as the archive location. The 'Open' menu starts a browse window.

Browse to the location where the portable archive is located, select it, and click 'OK'.



If the archive was password protected, the correct password must be entered here before the Viewer can gain access.

Once the Archive has opened, all mailboxes contained in the archive are displayed. Select a mailbox to access the mail in the archive.



| Retain Viewer - publish test Home | | | | | |
|--|---------------|--|----------------------|----------------------------|--------------------|
| Open Search Redaction Save Forwar Tools Message | | المعلم المعلم Nedaction | PST PDF Export to | | |
| Mailbox Benjamin (benjamin.po.dom) 🔹 | | | | | |
| 🔺 🗐 😭 Rush Home | | From | То | Subject | Date |
| 🔲 👝 Mailbox | | <pre>stephanie.harris@ibu;</pre> | "james@ibu | Topics for General Counsel | 20-Mar-2000 10:2 🔺 |
| | | <pre>stephanie.harris@ibu;</pre> | "james@ibu | Topics for General Counsel | 20-Mar-2000 10:2 |
| | | <pre>stephanie.harris@ibu;</pre> | "james@ibu | Topics for General Counsel | 20-Mar-2000 10:2 |
| | | <pre>stephanie.harris@ibu</pre> | "james@ibu | Re: San Antonio Meeting | 22-Mar-2000 05:5 |
| | • | | | | |
| Mail Notes Properties | | | | | |
| HTML Plain text Save → Forward | d 👻 🔎 🔲 Print | - | Black out | | |
| From: To: CC: BC: Subject: | | | | Da | te: |
| | | | | | |

It is important to note that while the Publisher stores time in UTC, the time displayed in the viewer, located in the 'Date' column for each message, is relative to the viewer's installed time zone, it is not in UTC. Messages published in PDF also display according local time zone. PST is exported in UTC, but Outlook rounds to the nearest minute, and displays the UTC timestamp in local time.

The text of the selected message will be displayed in the bottom viewer pane. The viewer contains options to show or hide the attachments, forward the message, as well as whether to view the message in plain text, or in HTML when available.

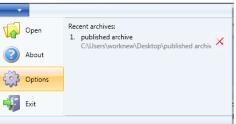
| Mail Notes Properties | |
|--|--|
| 🕴 🕼 Attachments 🛛 🖹 HTML 🔛 Plain text 🛛 💭 Save 🔻 👒 Forward 🔹 🎲 Print 🔹 👐 Strikeout/Unstrikeout | |

| Mail | Notes | Properties | | |
|------|--------|-----------------------|---|---|
| Co | re | | | * |
| | Me | essage Ty | /pe: Mail | |
| | | Owner U | JID: 9bd5f380-11db-0000-9acc-0065c7f2c244 | |
| | I | Parent No | ode: Mailbox | = |
| | | Re | ead: False | |
| | | Creat | ted: 12/28/2001 5:04:54 PM | |
| | | Delive | red: 5/28/2010 7:39:05 PM | |
| | | Stor | red: | |
| Add | ditior | n <mark>al Pro</mark> | perties | |
| | | emailSys | tem gw | Ŧ |

The properties tab displays the essential information on the mail item in question. The created, delivered, read status, and store date are displayed along with the identification number, message source, etc.

Forward

The Forward, and forward as attachment options allow the Retain Viewer to send the selected message from the archive to a destination account. 'Forward' functions exactly as the forward function in an email client. The 'Forward as attachment'



creates an attachment from the selected email and attaches it to a message sent.

In order to utilize the 'Forward' option in the viewer pane, the Viewer must be configured with a mail server. To tell the Viewer which SMTP server and account to use to send messages, select 'Options' from the dropdown menu.

The 'Settings' configuration menu will appear. Enter the DNS or address of the SMTP Server desired to use for the Viewer system, and an appropriate account, (Username is required, password is optional), to connect and send messages.

Language and displayed document format settings may be changed as well for the specific viewer.

| Settings | |
|-----------------|--|
| SMTP Settings | Language |
| The following s | ettings are used to send and forward messages from Retain Viewer |
| SMTP Server: | |
| E-mail: | |
| Password: | |
| | |
| | |
| | |
| | Save Cancel |



Redaction

Redaction allows the viewing auditor to compile notes on the archive. The notes are appended to the entire archive, and not any individual messages, which makes Redaction extremely useful to compile messages and identify messages of interest.



To enable redaction, the archive must first be exported with the redaction option enabled in the

publisher, (if the archive was not published with Redation enabled, the option will appear grayed out), and a redaction password must be entered.

On a redaction-enabled archive, to access the feature, it must be 'enabled' in the viewer. This option is found on the toolbar. Select 'Redaction' and enter the redaction password.

| Enable Redaction | |
|------------------|-------------------------|
| Enter the passwo | ord to enable redaction |
| | OK Cancel |
| | OK Cancel |

When Redaction is enabled, the 'Strikeout/Unstrikeout', 'Black out' options, and 'Notes' tab become active. The Notes tab works much like a notepad that is always connected to the archive. Items of interest or whole messages' texts can be copied and compiled in the redaction notes. Messages with notes on them are marked in the archive viewer with a notepad icon in the message list.

| Viewer - redact Home Open Search Redaction Tools Nessage | | | |
|--|--|--------------------|------------------------|
| Mailbox james | From | To Subj | ect Date |
| Mailbox | | | O Report 12/13, A |
| | | | dle in a Haysta 1/15/2 |
| | <pre><teri.majer@corp.enbridge.com></teri.majer@corp.enbridge.com></pre> | chris.po.dom RE: N | Needle in a Ha 1/15/2 |
| | ٠ ١١ | | |
| Mail Notes Properties Properties | | | |

Redaction notes are connected to the entire archive and are not tied to any specific selected message; they stay the same across all messages to be accessable regardless which message is selected.

Strikeout/Unstrikeout and Blackout

The Strikeout option enables a review of the archive before handing it over to legal scrutiny. This allows the user to denote items and messages which do not apply, or are unnecessary for the published goal. For example, if an investigation is being performed on specific activity, or internally on the account and all correspondence with a customer, the strikeout will allows messages or even sections of messages which do not apply, to be marked out.

To use the Strikeout, first Redaction must be enabled. After redaction is enabled, the options become active. To Strikeout or Unstrikeout messages in the message list, select the messages by placing a check in the checkbox and then select the 'Strikeout', or 'Unstrikeout' button from the top bar. To strikeout sections in the body of the message, highlight the desired section and select the 'Strikeout/Unstrikeout' button from the view message bar.

| ORetain Viewer - gw14-112 | | | | | | x |
|--|-------------------|----------------------------------|---------------------|----------------------------|---------------------------------|------|
| Home Copen Search Redaction Home Save Forward | Print Delete | abo Strikeout abo Unstrikeout | PST PDF | | | |
| Tools Message | 5 | Redaction | Export to | | | |
| Mailbox Kalob Sorensen (kalob@jimmyh 👻 | | | | | | 2 |
| Kalob Sorensen Home | | From | То | Subject | Date | |
| 🔳 👝 Mailbox | | Kendell Sorense | Nathan Sorensen; B | storage - 1 | 14-Mar-2014 | * |
| | V | Kendell Sorense | Nathan Sorensen; B | no message body | 14-Apr-2014 | |
| | V (2) | Kendell Sorense | Nathan Sorensen; B | appt | 14-Apr-2014 | |
| | V | Kendell Sorense | Nathan Sorensen; B | first - no body | 14-Apr-2014 | |
| | | Kendell Sorense | Nathan Sorensen; B | second - no body | 14-Apr-2014 | |
| | | Kendell Sorense | Nathan Sorensen; B | third - no body | 14-Apr-2014 | = |
| | | Kendell Sorense | Nathan Sorensen; B | New policy | 20-May-201 | |
| Mail Notes Properties Image: | ← 🚇 Print abos | Strikeout/Unstrike | out Black out Unico | ode (UTF-8) 🕶 | | |
| From: Kendell Sorensen To: Nathan Sorensen Beth Sorensen Kalo Subject: New policy be good | ib Sorensen Haley | Sorensen Jake Sc | rensen Amy Sorense | | 0-May-2014 05 Idell Sorensen | i:55 |
| Message | | | | | | • |

The Blackout option allows a reviewer to remove sensitive information, such as social security numbers, from published messages. To use the Blackout option, highlight the desired text and select the 'Blackout' button. Blackout cannot be removed from text.

Searching the Archive

The Retain Viewer provides full search functionality. The search function is accessed through either the shortcut 'Ctrl+F' or by selecting 'Search' from the toolbar.



- • •

The different options for the search are shown with the criteria input below the

options. Any text string or value can be searched for in the full text of the mail, or simply in the subject line. The following options are functional for both the search messages option included here, as well as the publisher search criteria. In the search 'look for' line:

C Find

- && represents 'and'
- I | represents 'or'
- No operators work as an exact match search.

| xact phrase Word beginning | Word ending All words Any word | AJ E (aj.po1_2012.dom1_2012) Anna E (anna.po1_2012.dom1_2012) Arry e (harry.po1_2012.dom1_2012) | * |
|----------------------------|--------------------------------|---|--------|
| rom/Author | | Image: Provide the state of | |
| | | | |
| o/CC | | Image: Sara E (sara.po1_2012.dom1_2012) | |
| | | Image: Provide the second s | |
| | | | |
| Item type: | | | |
| Mail | Appointment | | |
| Note Note | Task 📃 | | |
| Phone Message | Facebook | | |
| Twitter | SMS | | |
| MMS | Phone Call | | |
| BB PIN | BBM | | |
| Date range: | | | |
| Created or delivered bet | ween: | | |
| 7/2/2013 | 7/2/2014 15 | | |
| 174740400 | 17272021 | | |
| | | | |
| | | | * |
| | Advanced search | Search Reset | Cancel |

Search items by specific query

For example:

- Boy girl = exact search for "Boy girl"
- Boy && girl = Boy and girl search
- Boy || Girl = Boy OR girl search
- Boy && girl || dog && cat = Boy and girl OR dog and cat search.

NOTE: These search operators DO NOT work with the search option 'starts with', but can be utilized with all of the other base modes of the search.

NOTE: Lucene search engine does not recognize the following English 'stop words' or articles of speech: a, an, and, are, as, at, be, but, by, for, if, in, into, is, it, no, not, of, on, or, such, that, the, their, then, there, these, they, this, to, was, will, with

These words are not indexed by Lucene, and thus are not taken into account if they appear in the list

of words specified for the search. This may result in some unanticipated results in "exact" searches.

In addition to the operators and text, the sending Author or the destination and carbon copy recipients of a message as well as item type and the date range can specify or restrict a search. Selection of the date range is done through an interactive calendar. Be sure to select the desired mailbox or mailboxes to apply

| <u>.</u> | | , appear i | |
|--|--|----------------------|---------------|
| Find Results | | | |
| Home | | | |
| Open Search Redaction Save Forwa | | | |
| | Stop loading | | |
| 🔲 🛅 Search Results (7789) | From To | Subject | Date |
| | 🦳 🖂 <james@ibuycra< th=""><th>-</th><th>25-May-2001 🔺</th></james@ibuycra<> | - | 25-May-2001 🔺 |
| | 🔲 🖂 <ghkim@sk-ibuy< th=""><th>[Urgent]Approval for</th><th>05-Jun-2001</th></ghkim@sk-ibuy<> | [Urgent]Approval for | 05-Jun-2001 |
| | 🦳 🖂 <james@ibuycra< th=""><th>-</th><th>01-Jun-2000</th></james@ibuycra<> | - | 01-Jun-2000 |
| | 🦳 🖂 <james@ibuycra< th=""><th>-</th><th>01-Jun-2000</th></james@ibuycra<> | - | 01-Jun-2000 |
| | <james@ibuycra "rhutchison@velaw.cc<="" p=""></james@ibuycra> | - | 08-Dec-2000 👻 |
| Mail Notes Properties | | | |
| HTML Plain text 🚽 Save 🔿 Forward | d ▼ | | |
| From: To: CC: BC: Subject: | | | Date: |
| | | | |

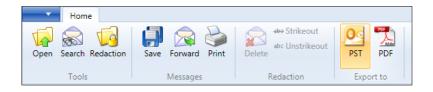
the search through. (The depicted example archive only contains one mailbox.) Select 'Search' to begin.

When the search is finished, the results will be displayed in a separate results window, identical to the main viewer interface.

PDF and PST Export

Retain Viewer can export selected files and messages from a mailbox or archive to a PDF or PST archive file. NOTE: *PST export requires MS Office or Outlook, or the associated plugin. The viewer will prompt for plugin installation if necessary. It is highly recommended to have Outlook installed.*

To migrate to PST, select desired files in the view window then select 'PST' from the toolbar.



A window confirming the location and file will open. When the 'Save' button is selected the PST file is created and available for use.

The Retain Viewer can also save selected messages as PDF. Select the desired messages and click 'PDF' in the toolbar.



The selected messages are then published in a single PDF. In addition to the standard file name and location, the PDF has title, exported by, and comment sections that the user is prompted to specify before the viewer publishes the PDF.

The finished PDF contains all the information displayed in the viewer, as well as an option to save individual text or message sources.

| Export to PDF | |
|---------------|--------------------------------|
| | Export to PDF |
| Title: | exported messages title |
| Subtitle: | Subtitle |
| Comments: | Comments show up here |
| Exported by: | Name of exporting user account |
| | |
| Export | Cancel |

The published PDF displays the separate emails along the top in a list and displays the message information in a lower pane, as shown below.

| 8 | Layout | i≡ Files | | | Search | 萬 * Shar |
|---------|---------------------------|---|---|-----------------------------|----------|-----------|
| Da | te | Subject | From | То | Size | |
| 9/1 | 5/2012 1:15:28 AM | Topics for General Counsel Off-site | <stephanie.harris@ibycra.org></stephanie.harris@ibycra.org> | "james@ibycra.org".GWIA.dom | 3.355 KB | |
| 9/1 | 5/2012 1:15:28 AM | Topics for General Counsel Off-site | <stephanie.harris@ibycra.org></stephanie.harris@ibycra.org> | "james@ibycra.org".GWIA.dom | 3.356 KB | |
| 9/1 | 5/2012 1:15:28 AM | Topics for General Counsel Off-site | <stephanie.harris@ibycra.org></stephanie.harris@ibycra.org> | "james@ibycra.org".GWIA.dom | 3.356 KB | |
| s for G | eneral Counsel Off-site.p | df | #222.0228 | | | Open File |
| | | | | | | |
| | | | | | | |
| | | | | | | |
| | | | | | | MAIL |
| | From: | <stephanie.harris@ib< td=""><td>ycra.org> ["stephanie.harris@iby</td><td>/cra.org".gwia.dom]</td><td></td><td></td></stephanie.harris@ib<> | ycra.org> ["stephanie.harris@iby | /cra.org".gwia.dom] | | |
| | To: | "james@ ibycra.org".0 | GWIA.dom ["james@ibycra.org". | gwia.dom] | | |
| | Subject: | Topics for General Co | unsel Off-site | | | |
| | Date: Creation Dat | 14-Sep-2012 19:15 e: 20-Mar-2000 10:27 | | | | |
| | Store Date: | 15-Sep-2012 15:38 | | | | |
| | Status: | | | | | |
| | Box Type: | received | | | | |
| | Folder: | Rush Home > Mailbox | | | | |
| | Message Id: | 5053824F.dom.po.20 | D.20000B2.1.2C.1 | | | |
| | Return-path | n: <email@domain.com></email@domain.com> | | | | |
| | Received: f | rom testing.com ([::ffff:19 | 92.168.1.100]) | | | |
| | by GW201 | 2SLES11SP2 with ESM | TP; Fri, 14 Sep 2012 19:1 | 5:18 -0600 | | |
| | - | | 22562.JavaMail.evans@tl | | | |
| | Date: Mon, | 20 Mar 2000 08:27:00 -0 | 0800 (PST) | | | |
| | From: step | hanie.harris@ibycra.org | | | | |
| | To: james@ | Dibvcra.org | | | | |
| | | pics for General Counse | l Off-site | | | |
| | Mime-Versi | | | | | |
| | | pe: text/plain; charset=us | s-ascii | | | |
| | - | ansfer-Encoding: 7bit | | | | |
| | Contentente | anoior Encounig. 7 bit | | | | |
| | Y-From: St | ephanie Harris | | | | |