



USER GUIDE

E-DISCOVERY

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1 Introduction

E-discovery (electronic discovery) is the legal procedure for locating, collecting, and delivering Electronically Stored Information (ESI) as evidence to be used in court cases or investigations. Information governance programs frequently incorporate e-discovery since it is an obligatory legal and regulatory requirement.

E-discovery is frequently ignored by organizations and only becomes meaningful after a case is launched. Moreover, the e-discovery process is often unfamiliar ground for many organizations with investigations into data privacy concerns and digital infiltration proving to be a challenge, even with experienced internal staff.

Organizations that store large amounts of data need to know exactly what data they have, and where it is located. Large databases might take months to search, and investigators need to have access to the right information quickly.

2 How Lepide Helps with e-Discovery

The Lepide Web Console provides an out-of-the-box e-Discovery tool that will scan your repositories to locate files containing Personally Identifiable Information (PII).

Our Solution allows you to combine multiple values as well as search an expansive range of file types ensuring you get the most accurate results possible, thereby avoiding time-consuming false positives.

3 Setting Up a Profile

The first step in the e-Discovery process is to set up a Profile:

- From the Home Screen, choose a Lepide Category, for example, **Lepide Identify**
- The Lepide Identify Dashboard screen is displayed
- From the top of the screen, click on **Lepide Identify** and choose **e-Discovery**

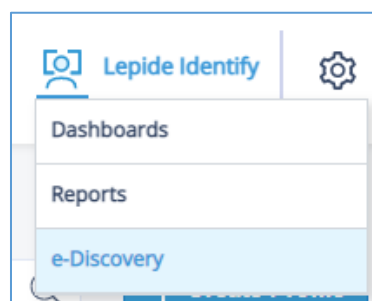
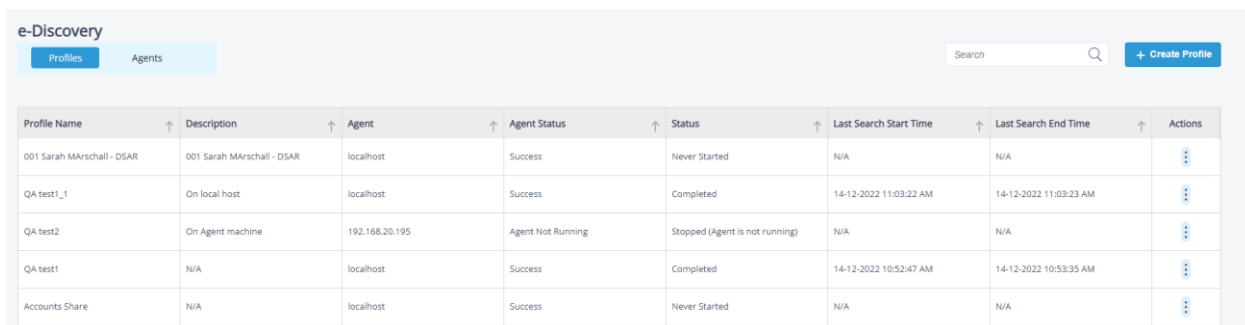


Figure 1: e-Discovery Menu Option

The e-Discovery screen will be displayed:



The screenshot shows the 'e-Discovery' interface with two tabs: 'Profiles' (selected) and 'Agents'. A search bar and a '+ Create Profile' button are visible at the top right. Below is a table with columns: Profile Name, Description, Agent, Agent Status, Status, Last Search Start Time, Last Search End Time, and Actions.

Profile Name	Description	Agent	Agent Status	Status	Last Search Start Time	Last Search End Time	Actions
001 Sarah MArshall - DSAR	001 Sarah MArshall - DSAR	localhost	Success	Never Started	N/A	N/A	⋮
QA test1_1	On local host	localhost	Success	Completed	14-12-2022 11:03:22 AM	14-12-2022 11:03:23 AM	⋮
QA test2	On Agent machine	192.168.20.195	Agent Not Running	Stopped (Agent is not running)	N/A	N/A	⋮
QA test1	N/A	localhost	Success	Completed	14-12-2022 10:52:47 AM	14-12-2022 10:53:35 AM	⋮
Accounts Share	N/A	localhost	Success	Never Started	N/A	N/A	⋮

Figure 2: e-Discovery Screen

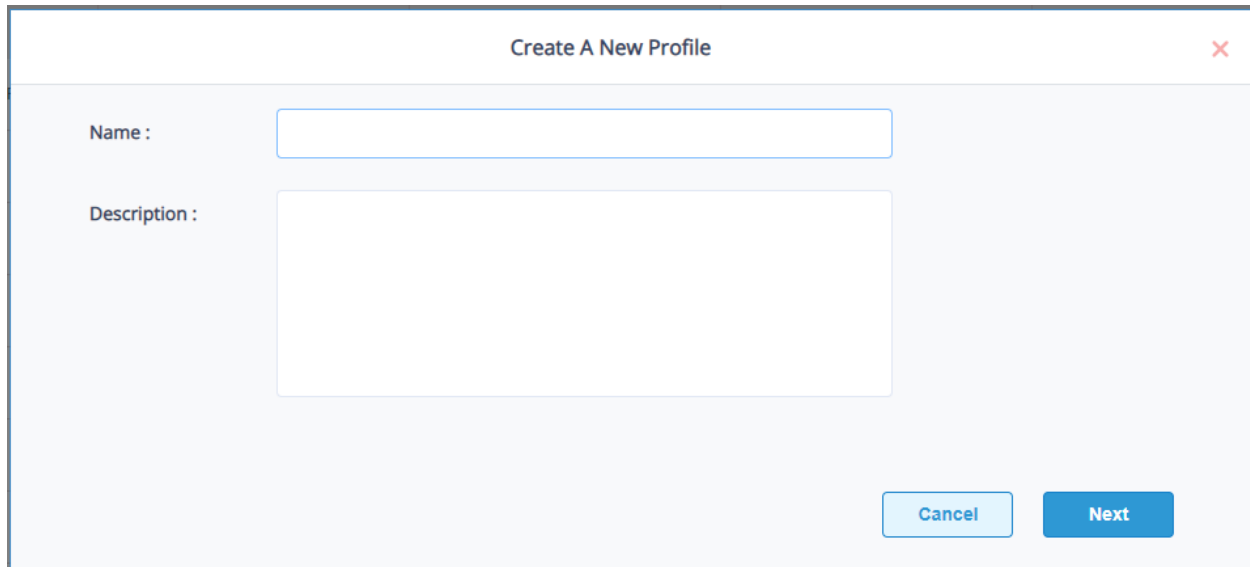
On the left of the screen are two tabs: **Profiles** and **Agents** and these are described below:

3.1 Create a new Profile

A profile needs to be created to specify the details of the data you want to find.

To create a Profile:

- Ensure that the **Profiles** tab is selected
- Click the **+ Create Profile** button (top right of the screen)
- The **Create a New Profile** dialog box is displayed:



The screenshot shows a dialog box titled "Create A New Profile" with a close button (X) in the top right corner. The dialog contains two input fields: "Name :" with a single-line text box, and "Description :" with a larger multi-line text box. At the bottom right, there are two buttons: "Cancel" (light blue) and "Next" (dark blue).

Figure 3: Create a New Profile

- Type in the Name of the profile and Description
- Click **Next**

The Select Objects dialog box is displayed:

Select Objects [X]

Component : Windows File Server [v]

Search Type : Non Index [v]

User Name : [Type here User name]
Use "Domain name\User name" format

Password : [Type here Password]

[Add File Server] [Add UNC Path]

Folder Path	Server	Action
-------------	--------	--------

[Cancel] [Back] [Next]

Figure 4: Select Objects

- Select the **Component**
- Select the **Search Type** of **Non Index**. Indexed will be an option coming in the next release
- Add the **User Name** in **Domain name\User name** format
- Type the **Password**. (this is the Active Directory login password)
- Click the **Add File Server** button to add a File Server. The file server will be listed at the bottom of the dialog box.
- Click the **Add UNC Path** to specify a UNC path in this format: **\\Server name\Share name**. This will be listed at the bottom of the dialog box.
- Click **Next**

The File Type dialog box is displayed:

The screenshot shows a dialog box titled "File Type" with a close button (X) in the top right corner. The dialog contains the following elements:

- File Criteria:** A dropdown menu currently set to "All".
- Enable OCR:** An unchecked checkbox.
- Select All:** An unchecked checkbox.
- Search File Type:** A search input field with a magnifying glass icon, and two circular buttons with "+" and "x" symbols.
- File Type:** A large, empty rectangular area intended for displaying file types.
- Last Modified:** A section with a date input field containing "Last Modified", a "Select Date" button, and a note: "Use 'YYYY/MM/DD HH:II' format".
- File Size Limit:** An input field followed by a dropdown menu set to "MB".
- Search For:** An input field containing "Enter String", an "Add" button, and a note: "Max limit 200 characters."
- Operator:** A dropdown menu set to "Select".
- Buttons:** "Cancel", "Back", and "Next" buttons at the bottom right.

Figure 5: File Type

This allows you to specify all details for the files you want to find. The more specific you can be here the better the search results will be.

Choose the following:

- **File Criteria:** All, Include or Exclude

The screenshot shows a dropdown menu with the following options:

- Include (highlighted)
- All
- Include
- Exclude

Figure 6: File Criteria

- If you choose **Include** or **Exclude**, the following file type options will be displayed:

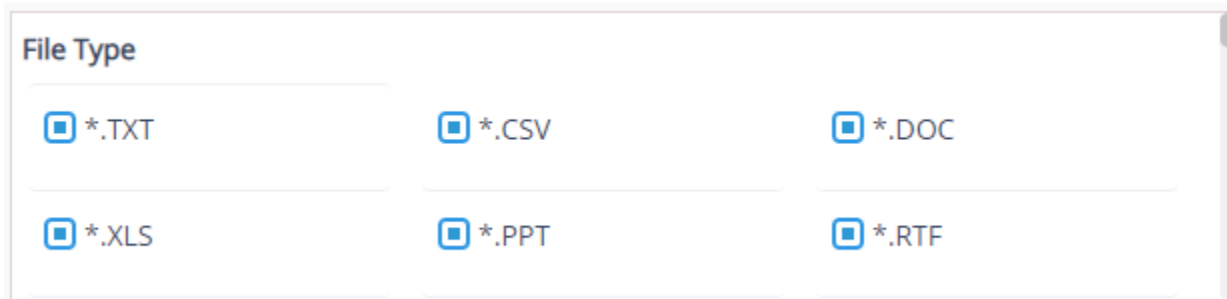


Figure 7: Select from File Types

This is a long list of file types. Scroll down to see the complete list. Check or uncheck the file type boxes to choose which ones you want to Include or Exclude

- **Enable OCR:** Check enable OCR (Optical Character Recognition) if you want image files containing text to be scanned
- **Select All:** Check this box to select all file types
- **Search File Type:** Type a file type here to search for and it will list all file types containing that value. For example, if you type .doc into the search box, it will show *.doc, *.docx and *.docm and so on.

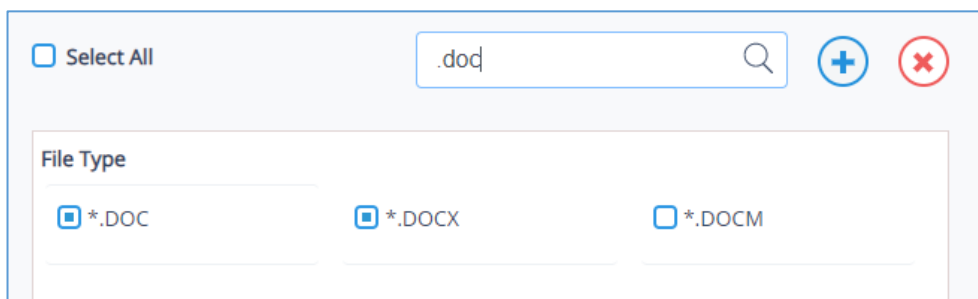


Figure 8: Search File Type

- Click the  icon to add a file type

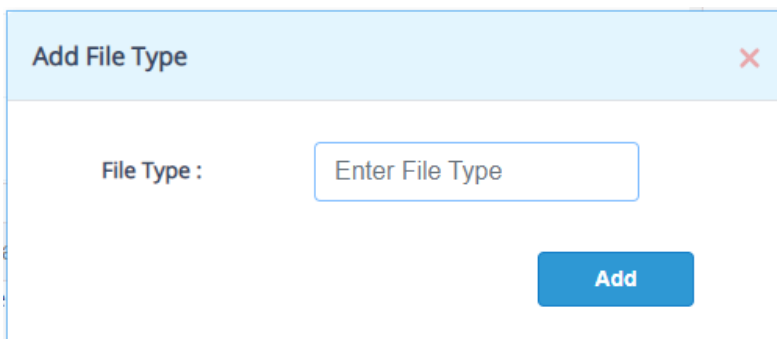



Figure 9: Add File Type

- Type the file type name and click **Add**
- If you want to remove this file type, select the file type to be removed and click the  icon
- Check **Last Modified** to specify a date when the file(s) was last modified

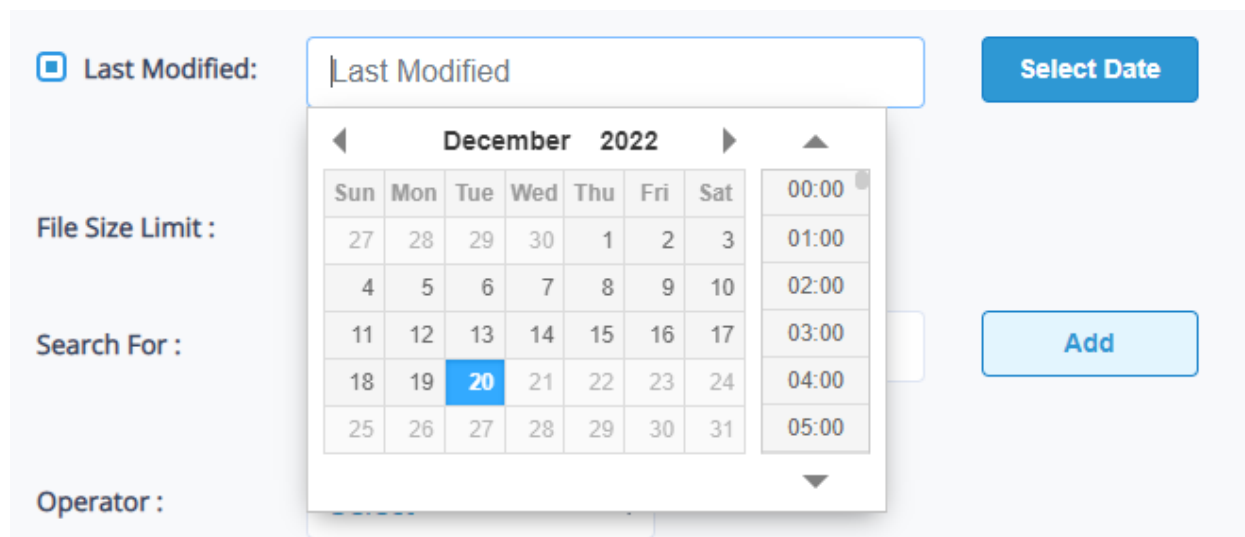


Figure 10: Last Modified Date

- **File Size Limit:** This can be KB or MB
- **Search For:** Here you can type strings of characters that you want to search for. Click **Add** to add each string.
In the example of searching for Paul Smith we could add strings of 'Paul Smith', 'P Smith', 'Paul S' and so on

- **Choose the Operator.** In this case it is **OR** to search for any of the strings

Each string will be displayed at the bottom of the dialog box along with the operator specified:

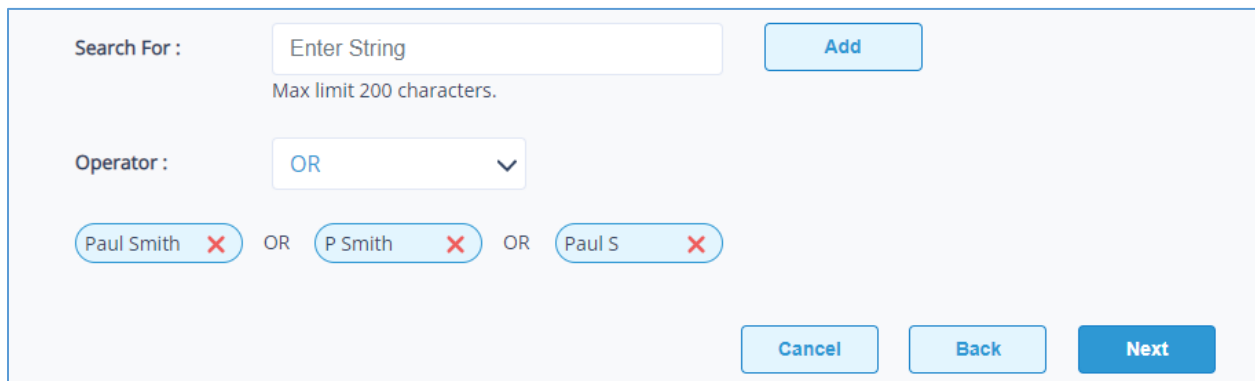


Figure 11: Add Character Strings

- Click **Next**

The Search Server dialog box will be displayed:

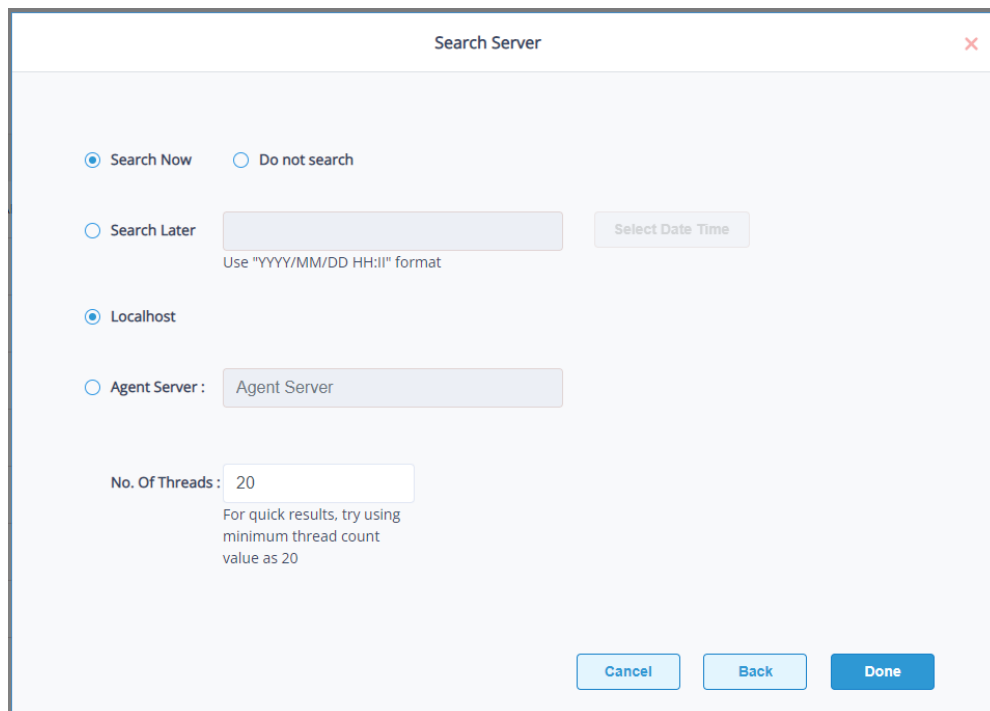


Figure 12: Search Server

Here you can specify when the Search should start:

- **Search Now** – search immediately
- **Do not Search** – the profile is set up, but the search can be initiated at a later date
- **Search Later** - specify a date and time for the search to start
- Choose **Local Host** or **Agent Server**

If you choose Agent Server, you will need to click the **Validate Agent** button

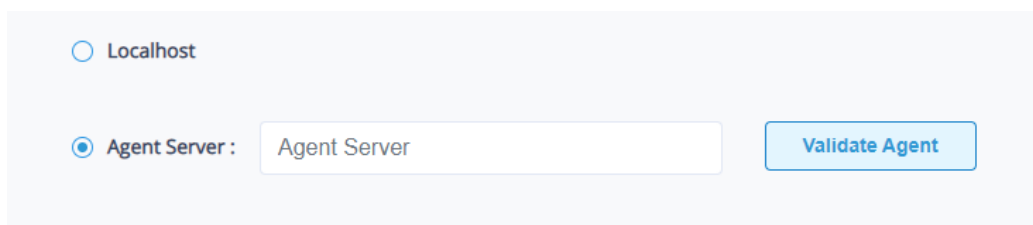


Figure 13: Validate Agent

- **No of Threads:** For quick results keep the minimum thread count value as 20
- Click **Done** when finished
- A message will appear: **Profile Created Successfully**


The profile will be listed in the e-Discovery screen:

e-Discovery

Profiles Agents Search [+ Create Profile](#)

Profile Name	Description	Agent	Agent Status	Status	Last Search Start Time	Last Search End Time	Actions
Paul Smith	N/A	localhost	Success	Never Started	N/A	N/A	⋮

Figure 14: e-Discovery

- From this screen, you can choose actions by clicking the  icon next to the profile on which you want to run an action

This will show the following menu:



Figure 15: Profile Action Menu

The menu options are as follows:

- **Start Scan:** Starts the scan running
- **Remove:** Delete the Profile

If you choose **Remove**, you will have to confirm the action:

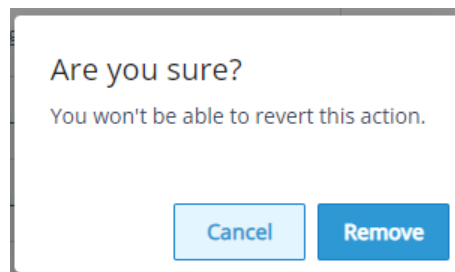


Figure 16: Confirm Removing the Profile

- **Edit:** Edit the scan settings
- **Failed Report:** List all Failed Reports for this Profile
- **Success Report:** List all Success Reports for this scan
- The Success and Failed reports can be Exported by clicking the **Export** button and choosing **CSV** or **PDF**:

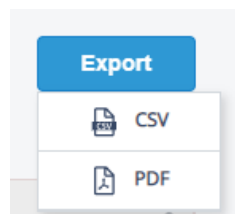



Figure 17: Export Menu

3.2 Install Agent

- Click the **Agents** tab (top of the screen next to Profiles)
- This will display the Agents screen and will list all installed agents
- Agent settings can be edited by clicking the  icon
- To add a new Agent, click the **Install Agent** button

This displays the Install Agent dialog box:

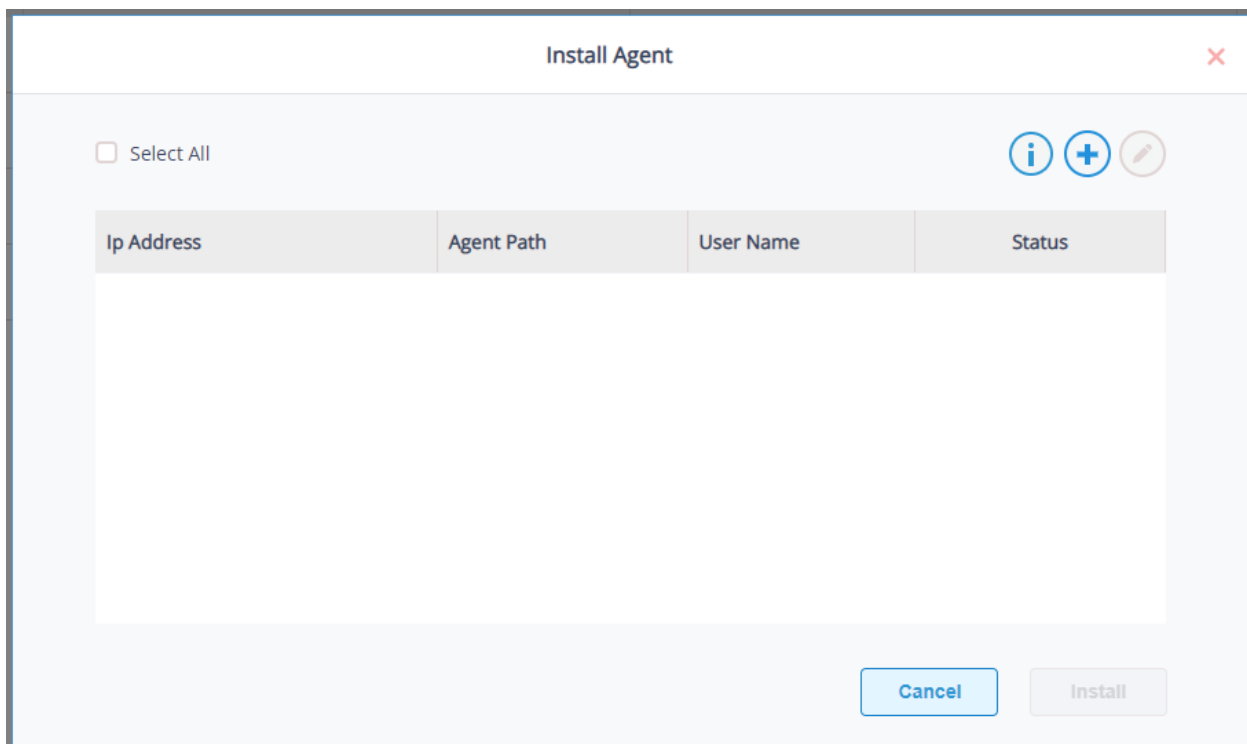

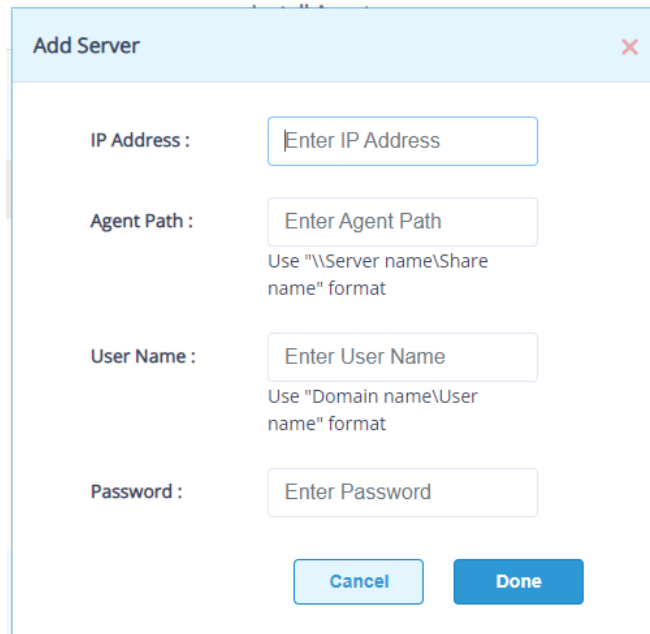


Figure 18: Install Agent

To add a new agent:

- Click the  icon

This displays the Add Server dialog box:



The screenshot shows a dialog box titled "Add Server" with a close button (X) in the top right corner. The dialog contains four input fields, each with a label and a placeholder text:

- IP Address :** Enter IP Address
- Agent Path :** Enter Agent Path
Use "\Server name\Share name" format
- User Name :** Enter User Name
Use "Domain name\User name" format
- Password :** Enter Password

At the bottom of the dialog, there are two buttons: "Cancel" and "Done".

Figure 19: Add Server

- Add the following information:
 - **IP Address:** Add the IP Address
 - **Agent Path:** Use [\\Server](#) name\Share name format
 - **User Name:** Use domain name\User name format
 - **Password:** Enter Active Directory password
- Click **Done** when finished

- Once all the Agents have been added, check the box(es) to select Agents individually or choose **Select All** to select all Agents
- Click the **Install** button to install the Agents.

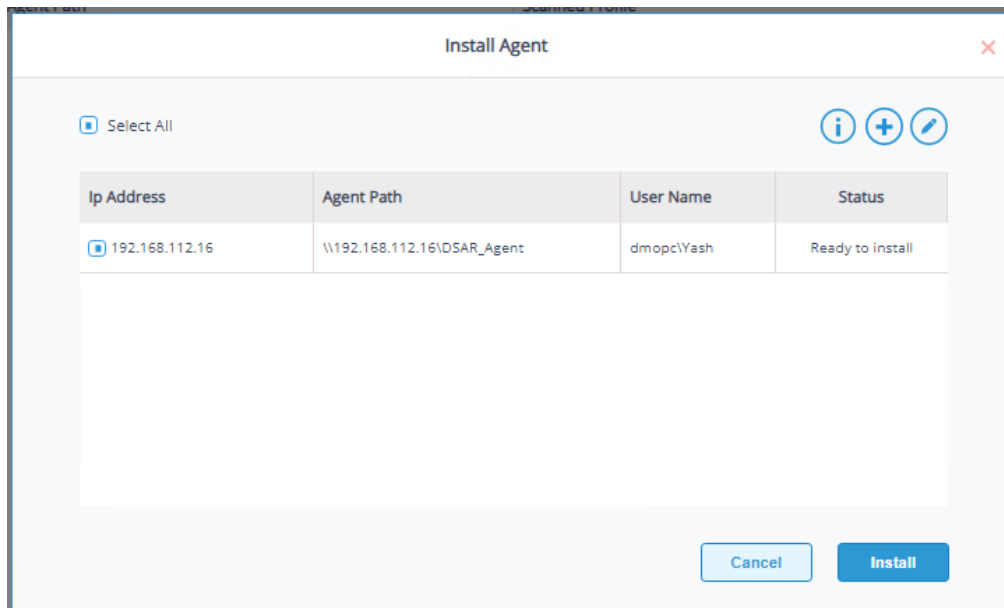


Figure 20: Install Agent with Server Added

4 Support

If you are facing any issues whilst installing, configuring, or using the solution, you can connect with our team using the contact information below.

Product Experts

USA/Canada: +1(0)-800-814-0578

UK/Europe: +44 (0) -208-099-5403

Rest of the World: +91 (0) -991-004-9028

Technical Gurus

USA/Canada: +1(0)-800-814-0578

UK/Europe: +44 (0) -208-099-5403

Rest of the World: +91(0)-991-085-4291

Alternatively, visit <https://www.lepide.com/contactus.html> to chat live with our team. You can also email your queries to the following addresses:

sales@Lepide.com

support@Lepide.com

To read more about the solution, visit <https://www.lepide.com/data-security-platform/>.

5 Trademarks

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