Symantec Discovery Accelerator
Installing and Configuring

Windows

6.0
Installing and Configuring

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Symantec Discovery Accelerator 6.0

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Introducing Discovery Accelerator

This chapter includes the following topics:

- Key features of Discovery Accelerator
- The Discovery Accelerator process
- Discovery Accelerator components

Key features of Discovery Accelerator

Discovery Accelerator is a fully managed legal discovery and review system that integrates with Enterprise Vault services and archives. Discovery Accelerator enables authorized users to retrieve, review, mark, and publish emails and other electronic messages for lead counsel examination or court-ready production. Using lawyers to review large numbers of items is costly. With Discovery Accelerator, you can create a hierarchy of reviewers for a case, with different levels of reviewers able to assign certain review marks. In this way, less expensive, nonlegal staff can perform an initial review of search results, leaving only the relevant or questionable items for lawyers. The relevant items are then assigned an appropriate Bates number and published, typically in a PST file, for presentation as evidence in court.
The Discovery Accelerator process

The figure below provides an overview of the steps in the discovery process.

**Figure 1-1** Steps in the Discovery Accelerator process

In outline, the steps are as follows:

1. **The Discovery Accelerator system administrator sets up a case.** All the messages and files pertaining to the case are already stored in Enterprise Vault archives. Typically, mailbox archives are journal mailbox archives, but you can include individual user mailboxes in searches. Public Folder, File system, and SharePoint archives can be searched, too.

2. **To find specific messages or documents in the archives, a user with search permissions, such as a case administrator, creates a search of journal mailboxes and file system archives.** The searches that you create with Discovery Accelerator are highly configurable. The criteria that you specify can include words and phrases to search for, date ranges, message size and type, author and recipient details, attachment details, and more.

3. **When the search finishes, the user who ran the search can check that the results are as expected and then choose to accept or reject them. If the results are accepted, Discovery Accelerator adds the items to the case review set.**
4 The administrator assigns the items in the case review set to reviewers for viewing and marking.
For example, one reviewer could have the role of first-pass reviewer, and another reviewer could have the role of legal reviewer. The first-pass reviewer looks at each item to ascertain if it relates to the search criteria and applies a mark to those items that match. The legal reviewer then checks all the items marked as relevant or questioned to verify if any of the messages or documents should be referred to the prosecution.

5 The items that reviewers have marked are published in a suitable form, such as a PST file, Domino NSF database, or in HTML or MSG format. You can choose to produce the items or export the items. The production process generates a Bates number for each item and locks the item to stop reviewers from changing the mark that is assigned to it. The export process does not generate a Bates number for an item or lock the item, so reviewers can continue to work on it.

**Discovery Accelerator components**

The table below lists the primary Discovery Accelerator components.

<table>
<thead>
<tr>
<th>Component</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discovery Accelerator Web</td>
<td>Used by Discovery Accelerator administrators to manage the system and by reviewers to access the items that they are to read and mark.</td>
</tr>
<tr>
<td>interface</td>
<td></td>
</tr>
<tr>
<td>Accelerator Administration</td>
<td>Lets you set up and manage multiple Discovery Accelerator databases to store your data. By using this facility, for example, you can split your data by date range or organizational unit.</td>
</tr>
<tr>
<td>Web interface</td>
<td></td>
</tr>
<tr>
<td>Enterprise Vault Accelerator</td>
<td>Handles requests from the Discovery Accelerator Web interface, and works with the Enterprise Vault components to access archives, perform searches, and so on.</td>
</tr>
<tr>
<td>Manager Service</td>
<td></td>
</tr>
<tr>
<td>Customer database</td>
<td>An SQL database in which Discovery Accelerator stores details of cases, user roles, search results, marking schemes, and more. You can set up multiple customer databases.</td>
</tr>
<tr>
<td>Configuration database</td>
<td>An SQL database that specifies the locations of the customer databases, and stores details of the SQL Server, database files, and log files to use.</td>
</tr>
</tbody>
</table>
In small installations, these components can all reside on the same computer as Enterprise Vault. We recommend a more distributed setup for larger installations, with the Discovery Accelerator components on a different computer from the Enterprise Vault server. See Chapter 2, “Preparing to install Discovery Accelerator” for more information on distributed configurations.
Preparing to install Discovery Accelerator

This chapter includes the following topics:

- Configuration options
- Installing prerequisite software
- Enabling Active Server Pages and ASP.NET on Windows Server 2003
- Setting the Temp folder permissions
- Installing Discovery Accelerator on a Windows 2000 domain controller
- Setting permissions on SQL databases

Configuration options

Although you can install Discovery Accelerator on the same computer as your normal Enterprise Vault installation, you may prefer to install it on a separate computer. The following sections describe some possible configurations. If your planned configuration is different and you are unsure of what to configure on the Discovery Accelerator computer, contact Symantec Support for advice.

You should not run Discovery Accelerator and Compliance Accelerator concurrently on the same computer.
Configuration for large installations

A stand-alone installation of Discovery Accelerator with a separate SQL Server™ computer minimizes the effect that intensive Discovery Accelerator searching has on the Enterprise Vault installation. This configuration is likely to suit larger installations.

**Figure 2-1**  Configuration for large installations

![Diagram showing separate Enterprise Vault and SQL Server](image)

Configuration for smaller installations

For smaller installations, it is acceptable to run Enterprise Vault and the SQL Server on the same computer.

**Figure 2-2**  Configuration for smaller installations

![Diagram showing Enterprise Vault and SQL Server on the same computer](image)
Preparing to install Discovery Accelerator

Installing prerequisite software

Pilot configuration

For piloting purposes, you can run Discovery Accelerator and the SQL Server on the same computer as the main Enterprise Vault installation.

Figure 2-3  Pilot configuration

Enterprise Vault with SQL Server and Discovery Accelerator

Installing prerequisite software

The instructions in this section assume the following:

- You will install Discovery Accelerator on a separate computer from Enterprise Vault and the SQL Server.
- You already have a working installation of Enterprise Vault.
- You will install Internet Information Services (IIS) on the same server as Discovery Accelerator.

Install and configure the following software items on the computer that is to run Discovery Accelerator.
### Table 2-1 Prerequisite software

<table>
<thead>
<tr>
<th>Item</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows Server 2003 or Windows 2000 Server SP1 or later</td>
<td>If the computer is already running Enterprise Vault, you may have already installed this version of Windows. As you must install and configure Discovery Accelerator using the Vault Service account, the Discovery Accelerator computer must be in the same domain as the Enterprise Vault server or in a trusted domain.</td>
</tr>
<tr>
<td>Microsoft Internet Explorer 6.0 or later</td>
<td>If the computer is already running Enterprise Vault, you may have already installed this version of Internet Explorer. Note: You must enable cookies in Internet Explorer and disable any pop-up blockers. Pop-up blockers may disrupt the dialog boxes that appear when you review messages with Discovery Accelerator.</td>
</tr>
<tr>
<td>Enterprise Vault 6.0 SP3</td>
<td>If Discovery Accelerator is installed on a separate computer from Enterprise Vault, you must install the Enterprise Vault software on the Discovery Accelerator computer. You do not need to configure the Enterprise Vault software, but you do need the prerequisite software and settings, as described in the <em>Installing and Configuring Enterprise Vault</em> manual. With this configuration, it is advisable to stop the Enterprise Vault Admin Service and set its Startup Type to Disabled. To search on content in Discovery Accelerator, set indexing on the accessed vault archives to full. All Enterprise Vault servers in the site must be running the same version of Enterprise Vault.</td>
</tr>
<tr>
<td>Microsoft .NET Framework v2.0</td>
<td>Available as a separate download (see the Redistributables folder in the kit). We recommend that you do not configure the Discovery Accelerator server to download and install .NET Framework updates automatically from the Windows Update site. Contact Symantec Support before installing such updates.</td>
</tr>
<tr>
<td>Microsoft Internet Explorer WebControls</td>
<td>Available as a separate download (see the Redistributables folder in the kit). The computer may need a later version of Microsoft Windows Installer before you can install the WebControls. In this case, install Version 2.0 of Windows Installer.</td>
</tr>
</tbody>
</table>
Enabling Active Server Pages and ASP.NET on Windows Server 2003

When you install IIS and the .NET Framework on Windows 2000, Active Server Pages and ASP.NET are enabled by default. On Windows Server 2003, however, you must enable them manually.

To enable Active Server Pages and ASP.NET on Windows Server 2003

1. Open Control Panel.
2. Click the Add or Remove Programs applet.
3. Click Add/Remove Windows Components.
4. In the Windows Component wizard, click Application Server.
5. Click Details.
6. In the Application Server dialog box, check ASP.NET.
7. Click Information Services (IIS).
8. Click Details.
Preparing to install Discovery Accelerator
Enabling Active Server Pages and ASP.NET on Windows Server 2003

9. In the Internet Information Services dialog box, click **World Wide Web Service**.

10. Click **Details**.

11. In the World Wide Web Service dialog box, check **Active Server Pages**.

12. Click **OK** to close the dialog boxes and return to the Windows Components wizard.

13. Click **Next** to install the additional components.

14. Click **Finish**.

To check that Active Server Page scripts can run

1. Open IIS Manager.

2. In the left pane, click **Web Service Extensions**.
Preparing to install Discovery Accelerator

Setting the Temp folder permissions

3 Check that **Active Server Pages** are **Allowed**.

**Setting the Temp folder permissions**

To ensure that reviewers can view HTML versions of messages, you must give authenticated users Full Control access to the Windows Temp folder on the Discovery Accelerator service computer (typically `C:\Windows\Temp`).

These users also require access to the ASP.NET Temp folder for Discovery Accelerator on the IIS computer. This folder is typically:

`C:\WINDOWS\Microsoft.NET\Framework\v2.0...\Temporary ASP.NET Files\evbadiscovery`

To set the Temp folder permissions

1 In Windows Explorer, open the properties sheet for the folder whose permissions you want to change.

2 Click the **Security** tab.
3 Add **Authenticated Users** and give them **Full Control**.

4 Click **Advanced**.

5 Ensure that **Allow inheritable permissions from parent to propagate to this object** is checked.

### Installing Discovery Accelerator on a Windows 2000 domain controller

If you install Discovery Accelerator on a Windows 2000 Server domain controller computer, access errors may be reported when you go to the Discovery Accelerator home page for the first time. To fix this problem, see the following article in the Microsoft Knowledge Base:

http://support.microsoft.com/?kbid=824308
Setting permissions on SQL databases

Search schedules in Discovery Accelerator use SQL jobs in SQLSERVERAGENT. To enable Discovery Accelerator to create and modify these jobs, the Vault Service account must be a SQL system administrator on the SQL Server.

To make the Vault Service account a SQL system administrator

1. On the SQL Server computer, start SQL Server Enterprise Manager.
2. Expand the tree to display first the (local) SQL server and then the Security folder.
3. Click Logins to display the users in the right pane.
4. Right-click the Vault Service account and then click Properties. Alternatively, you can assign the role to the local Administrators group, which includes the Vault Service account.
5. In the properties sheet, click the Server Roles tab.
6 Ensure that both System Administrators and Database Creators are checked.

7 Close the properties sheet.

SQL database access on distributed systems

If you plan to create the Discovery Accelerator database and Enterprise Vault databases on different servers, you must create a SQL logon for the Enterprise Vault Service account that is identical to the one on the Enterprise Vault database server.
Installing Discovery Accelerator

This chapter includes the following topics:

- Overview of the setup procedure
- Installing the Discovery Accelerator software
- Creating the customer and configuration databases
- Hosting multiple Discovery Accelerator servers and customers
- Setting system configuration options
- Uninstalling Discovery Accelerator

Overview of the setup procedure

Whether you want to perform a first-time installation of Discovery Accelerator or upgrade from an earlier version, follow the instructions in this section to install and configure the software. The process has two stages:

1. Install the Discovery Accelerator software.
2. Create the Discovery Accelerator configuration and customer databases.

The following sections describe these steps in detail. If you want to set up Discovery Accelerator for use in a Web Farm, see Appendix B, “Running Discovery Accelerator in a Web Farm” for instructions.
Installing the Discovery Accelerator software

As part of the setup process, the installation program creates the following:

- The Discovery Accelerator Web site, which typically has the address http://<servername>/EVBADiscovery.
- A second Web site with which you can set up and administer multiple Discovery Accelerator customers. This site has the address http://<servername>/EVBAAdmin.
- The Enterprise Vault Accelerator Manager service.

To install the Discovery Accelerator software

1. Log on as the Vault Service account.
2. If you want to upgrade from an earlier version of Discovery Accelerator, use the Services snap-in to Microsoft Management Console to stop the Enterprise Vault Discovery Service.
3. Start the Discovery Accelerator installation program (DiscoveryAccelerator.msi).
4. Follow the on-screen instructions. At several points during the setup process, the installation program prompts you to submit information.

- If you are upgrading from an earlier version of Discovery Accelerator, the installation program requests that you remove this version before you proceed. When it removes the earlier version, Discovery Accelerator makes a backup copy of your old configuration settings.
- When you are prompted to choose a setup type, make your selection as follows:

<table>
<thead>
<tr>
<th>Choose this</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Typical</td>
<td>Install the most commonly used program features. This option is recommended for most users.</td>
</tr>
<tr>
<td>Custom</td>
<td>Select the components that you want to install. For example, you can choose to install the Discovery Accelerator Web site and Accelerator Manager service but not the Administration site. We recommend that only advanced users select this option.</td>
</tr>
<tr>
<td>Complete</td>
<td>Install all the Discovery Accelerator components.</td>
</tr>
</tbody>
</table>
Installing Discovery Accelerator

Creating the customer and configuration databases

When you are prompted for details of the account under which to run the Enterprise Vault Accelerator Manager service, enter the details of the Vault Service account with which you manage your Enterprise Vault server.

When the installation program has finished, copy a valid license key file into the Discovery Accelerator program folder (typically C:\Program Files\Enterprise Vault Business Accelerator). Contact Symantec Corporation to obtain your license key, if you do not already have it. Without a license key, you cannot proceed with the installation.

Note: If you want to use the legal hold facility to stop users from deleting items from their archives, you must install a Discovery Accelerator license on each storage server in your Enterprise Vault site. To do this, find the Enterprise Vault license key file on each server, and open it in a text editor. Then paste into the file the Discovery Accelerator license key with which you have been provided. This key typically looks like this:

```
# Component: Discovery Accelerator
FEATURE EVDA KVSPLC 1.000 12-dec-2006 uncounted F7D8D075BDCA \ 
  VENDOR_STRING=2;8192;0 HOSTID=ANY
```

Use the Services snap-in to Microsoft Management Console to check that the Enterprise Vault Accelerator Manager service has started. If it has not, start the service.

Creating the customer and configuration databases

The customer database stores details of cases, user roles, search results, marking schemes, and more, whereas the configuration database specifies the locations of the customer databases, and stores details of the SQL Server, database files, and log files to use. You can set up multiple customer databases.

To create the configuration database and customer database

1. If you have not already done so, log on as the Vault Service account.

2. Start Internet Explorer and go to the Discovery Accelerator home page (typically http://<servername>/EVBADiscovery).

   Note: If Internet Explorer cannot find this page, see “EVBADiscovery home page not found” on page 60 for guidelines on how to proceed.

3. In the Discovery Accelerator home page, click Configure.
The Configuration Database Details page appears. This page lets you configure the database in which the system stores the data needed to configure Discovery Accelerator servers and customers.

4 Complete the boxes, using the online help to assist you if you necessary, and then click **OK**.
5 When Discovery Accelerator prompts you to do so, restart the Enterprise Vault Accelerator Manager service using the Services snap-in to Microsoft Management Console.

6 In Discovery Accelerator, click OK.
Installing Discovery Accelerator

Creating the customer and configuration databases

The Create Customer page appears.

If you want to upgrade from an earlier version of Discovery Accelerator, most boxes contain data from the previous installation.

7  Complete the details, and then click **OK**.

8  Wait for Discovery Accelerator to create the customer database. Note that this process can take several minutes to complete.
Hosting multiple Discovery Accelerator servers and customers

In large installations, you may need to host multiple Discovery Accelerator servers and Web sites, or customers, each with its own Discovery Accelerator database. Where this is the case, you can set up and manage the servers and customers with the Discovery Accelerator Administration Web site.

To host multiple Discovery Accelerator servers and customers
1. If you have not already done so, log on as the Vault Service account.
2. Start Internet Explorer and go to the home page of the Discovery Accelerator Administration Web site (typically http://<servername>/EVBAAdmin).
3. Do one of the following:
   - To add a new customer, right-click the server name at the top of the left pane, and then click New Customer.
   - To edit the details of an existing customer, right-click the customer name in the left pane, and then click Properties.
4. Complete the details in the Customer page, using the online help to guide you if necessary.
5. Click OK.
Setting system configuration options

Many aspects of the Discovery Accelerator system are configurable through the Web interface. For example, you can do the following:

■ Hide or show selected Discovery Accelerator features.
■ Optimize the search features and review features to improve performance.

If you used an older version of Discovery Accelerator, many of these options were previously available through the .config files.

You must have the Modify System Configuration permission to change the configuration settings. By default, users with the role of Discovery System Admin have this permission.

To customize Discovery Accelerator

1 In the Application Administration column of the Discovery Accelerator home page, click System Configuration.

2 In the Settings for box in the System Configuration page, click the category of settings that you want to customize.
The following categories are available:

<table>
<thead>
<tr>
<th>Use this category</th>
<th>To do this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad Hoc Searches</td>
<td>Configure the searches that users can initiate from any personal folders that they have created.</td>
</tr>
<tr>
<td>Diagnostics</td>
<td>Enable or disable the Discovery Accelerator troubleshooting facilities.</td>
</tr>
<tr>
<td>Document Conversion</td>
<td>Customize the error messages that are displayed in the Review Items page.</td>
</tr>
<tr>
<td>Employee Synchronisation</td>
<td>Control how Discovery Accelerator synchronizes user profiles with the corresponding Active Directory accounts.</td>
</tr>
<tr>
<td>Export/production</td>
<td>Configure the output when users export or produce items from Discovery Accelerator for offline review.</td>
</tr>
<tr>
<td>General</td>
<td>Configure general Discovery Accelerator options.</td>
</tr>
<tr>
<td>Item Prefetch Cache</td>
<td>Configure the primary settings for the Discovery Accelerator prefetch cache mechanism. This mechanism is designed to speed the rendering of messages in the Review Items page.</td>
</tr>
<tr>
<td>Item Prefetch Cache (Advanced)</td>
<td>Configure advanced settings for the prefetch cache mechanism.</td>
</tr>
<tr>
<td>Legal Hold</td>
<td>Configure the Discovery Accelerator Legal Hold mechanism. This mechanism allows case administrators to prevent the documents and messages in their cases from being deleted.</td>
</tr>
<tr>
<td>Message Counts</td>
<td>Customize the counts of pending, questioned, and unreviewed messages in the Review Messages column of the Discovery Accelerator home page. You can select a color for each type of count and specify an identifying prefix for it.</td>
</tr>
<tr>
<td>Reviewing</td>
<td>Customize the appearance and functionality of the Review Items page.</td>
</tr>
<tr>
<td>Search</td>
<td>Optimize the search features in Discovery Accelerator.</td>
</tr>
<tr>
<td>Security</td>
<td>Identify the account under which the pool of Enterprise Vault Accelerator applications is configured to run in IIS.</td>
</tr>
<tr>
<td>System</td>
<td>Record the date on which you installed Enterprise Vault and began to archive data, choose whether to include Public Folder and SharePoint Portal Server vaults in searches, and more.</td>
</tr>
<tr>
<td>Vault Directory Synchronisation</td>
<td>Configure when Discovery Accelerator synchronizes with the Enterprise Vault archives.</td>
</tr>
</tbody>
</table>
For each option whose value you want to change, do the following:

a  Click **Edit** at the right of the row.

b  Set the required value.

c  Click **OK** at the right of the row.

4 When you have set all the required options, click **OK** at the bottom of the page to return to the previous page.

5 If necessary, restart the Enterprise Vault Accelerator Manager Service to put your changes into effect.

### Uninstalling Discovery Accelerator

If you plan to uninstall Discovery Accelerator, first delete any search schedules that you have created. The uninstallation process does not delete the schedules, so, if you later reinstall Discovery Accelerator, they are displayed in the schedule list. If the name of your new Discovery Accelerator database differs from the old, these schedules generate errors if used.

#### To delete search schedules

1  In the **Application Administration** column of the Discovery Accelerator home page, click **Search Schedules**.

2  Click the name of the first schedule, and then click **Delete**.

3  Repeat step 2 for each schedule.

4  Click **Close**.

#### To uninstall Discovery Accelerator

1  Log on as the Vault Service account.

2  Use the Services snap-in to Microsoft Management Console to stop the Enterprise Vault Accelerator Manager service.

3  If required, make backup copies of the configuration (**.config**) files under the Discovery Accelerator program folder. Except for the license key file, all the files and subfolders in this folder are deleted when you uninstall Discovery Accelerator.

4  In Control Panel, open **Add or Remove Programs**.
5 Choose to remove **Enterprise Vault Discovery Accelerator**, and then follow the on-screen instructions to do so.

*Note:* The uninstallation process does not remove the Discovery Accelerator databases. If you do not remove the databases, and you later reinstall Discovery Accelerator, you must specify a different database name as part of the setup process.

6 When you have removed Discovery Accelerator, restart the computer.
32

Installing Discovery Accelerator

Uninstalling Discovery Accelerator
Getting started with Discovery Accelerator

This chapter includes the following topics:

- Using the Discovery Accelerator Web interface
- Setting up a basic Discovery Accelerator system
- Searching for case-related items
- Reviewing the items in a case review set
- Working with folders
- Undertaking production runs
Using the Discovery Accelerator Web interface

In the Discovery Accelerator Web interface, roles determine the cases, features, and tasks that each user has permission to access. For example, the figure below illustrates facilities that only users with the most permissive roles can access.

You can change the view that users have by assigning different roles to them or by changing the permissions associated with their roles. See “Setting up a basic Discovery Accelerator system” on page 35 for instructions on how to set up and assign roles.

For the best results when running Discovery Accelerator, note the following:

- Use the links to navigate from page to page rather than shortcut keys or the buttons in the browser toolbar. In particular, click **OK** or **Close** at the bottom of most pages to close a page and return to the previous page, rather than pressing the **Backspace** key or clicking the **Back** button in the toolbar.
- Click the product name at the top of any page to return to the home page of Discovery Accelerator.
- In most cases, you can reload the current page by right-clicking it and then clicking **Refresh**.
- Clicking **Home** in the browser toolbar displays the home page of the application.
- If Discovery Accelerator finds an error when it validates the information that you have entered in a page, the application displays an exclamation point (¡). To view information on the error, hover the mouse pointer over the exclamation point.
Setting up a basic Discovery Accelerator system

This section outlines some of the more commonly performed activities that you may want to undertake when you set up your Discovery Accelerator system. These activities include the following:

- Setting up user roles
- Opening new cases
- Assigning roles to users
- Setting up review marks
- Selecting the archives in which to search

For more information on how to perform these and other activities, see the online help for Discovery Accelerator.

Setting up user roles

You must assign everyone who works with Discovery Accelerator to a role, such as case administrator. The application comes with a small number of predefined roles, but, if none precisely meets your needs, you can create your own.

When you have set up the required roles, you can assign them to Discovery Accelerator users as described in “Assigning roles to users” on page 40.

To set up a user role

1. In the Application Administration column of the Discovery Accelerator home page, click Roles.

2. In the Roles page, click New Role.
3 In the Create Role page, type a unique name and an optional description for the role.

4 Choose whether to make the permissions that are associated with the role effective throughout the application \textit{(Application)} or at the case level only \textit{(Case)}. The selection that you make determines the permissions available.
Choose the permissions to associate with the role. The following tables list the available permissions.

Table 4-1  Application permissions

<table>
<thead>
<tr>
<th>This permission</th>
<th>Lets you</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create and Configure Cases</td>
<td>Create new cases and assign owners to them, and edit the properties of existing cases.</td>
</tr>
<tr>
<td>Export Configuration Data</td>
<td>Use the ImportExport command-line utility to export configuration data from the Discovery Accelerator database to an XML file. See “Using the ImportExport command” on page 72 for information on this utility.</td>
</tr>
<tr>
<td>Import Configuration Data</td>
<td>Load configuration data into the Discovery Accelerator database from an XML file, and view the import log.</td>
</tr>
<tr>
<td>Manage Administration Security</td>
<td>Assign application-wide roles to users. However, application administrators cannot assign case roles to users, as only case administrators can assign these roles (from within the Case Administration area).</td>
</tr>
<tr>
<td>Manage Global Target and Target Groups</td>
<td>Create, edit, and delete application-wide targets and target groups. These provide a shorthand way to supply multiple email addresses when you define the criteria for a search.</td>
</tr>
<tr>
<td>Manage Marks</td>
<td>Create and edit the marks available to all cases (but does not give access to marks that are created in a case).</td>
</tr>
<tr>
<td>Manage Roles</td>
<td>Add and remove application and case roles, and select the permissions to assign to each role.</td>
</tr>
<tr>
<td>Manage Schedules</td>
<td>Create, edit, and delete schedules, with which you can define when a future search or recurrent search is to run.</td>
</tr>
<tr>
<td>Manage Scheme Templates</td>
<td>Create, edit, and delete marking schemes (but does not give access to schemes that are created within a case).</td>
</tr>
<tr>
<td>Manage Search Attributes</td>
<td>Make additional, customized attributes available for searches.</td>
</tr>
<tr>
<td>Manage Vaults</td>
<td>Set up the default vault stores and archives available for searches. Case administrators can change the archives that are used for particular searches.</td>
</tr>
</tbody>
</table>
Click **OK**.

### Table 4-1  Application permissions

<table>
<thead>
<tr>
<th>This permission</th>
<th>Lets you</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modify System Configuration</td>
<td>Change the Discovery Accelerator system properties, which define the IIS server and SQL Server database to use. You can also customize the appearance, performance, and functionality of Discovery Accelerator.</td>
</tr>
<tr>
<td>View System Configuration</td>
<td>View the Discovery Accelerator system properties and configuration options that determine the appearance, performance, and functionality of the application.</td>
</tr>
</tbody>
</table>

### Table 4-2  Case and folder permissions

<table>
<thead>
<tr>
<th>This permission</th>
<th>Lets you</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign</td>
<td>Assign the items in the case or folder to individual reviewers.</td>
</tr>
<tr>
<td>Case Admin</td>
<td>Assign case-specific roles to users, and create, edit, and delete case-specific targets and target groups. This permission automatically includes all the other case or folder permissions.</td>
</tr>
<tr>
<td>Delete Folder</td>
<td>Delete the personal folders in which users have stored items for review.</td>
</tr>
<tr>
<td>Manage Legal Holds</td>
<td>Place holds on the items in a case to stop users from deleting them.</td>
</tr>
<tr>
<td>Perform Ad Hoc Searches</td>
<td>Possess full research permissions to create, delete, and modify personal folders, search for items to store in those folders, and review those items.</td>
</tr>
<tr>
<td>Production</td>
<td>Copy items out of the Discovery Accelerator database so that they can be reviewed offline.</td>
</tr>
<tr>
<td>Review</td>
<td>Review items and assign marks and comments to them.</td>
</tr>
<tr>
<td>Search</td>
<td>Undertake searches for items to store in the case review set.</td>
</tr>
</tbody>
</table>
Opening new cases

Everything that is related to a case, including user permissions, item reviewers, the marking scheme, searches, and the set of items to be reviewed, is grouped together in the case. Within a single Discovery Accelerator system, many cases can be worked on at the same time. To preserve case history, cases can be closed but not deleted.

To open a new case

1. In the Application Administration column of the Discovery Accelerator home page, click Cases.

2. In the Cases page, click New Case.

3. In the Create Case page, set the properties of the case.

As a minimum, you must do the following:

- Type a unique name for the case.
- Nominate a user to serve as the case owner.
- Select at least one vault store in which Discovery Accelerator should search for relevant information for the case.

4. Click OK.
Assigning roles to users

When you have configured the Discovery Accelerator roles to suit your organization, you can assign them to the users who are to play those roles. You must add to the system all the people who will use it as a Discovery Accelerator system administrator, case administrator, or reviewer. Some roles are effective at the application level, across the entire Discovery Accelerator system, whereas others apply at the case level or folder level only.

To assign a role to a user

1. Do one of the following:
   - To assign an application-wide role, click Role Assignment in the Application Administration column of the Discovery Accelerator home page.
   - To assign a case-specific role, click the case name in the Case Administration column of the home page, and then click Role Assignment.

2. In the Roles box of the Role Assignment page, select the required role.

3. In the Users box, select one or more users to whom you want to assign the role. If this box is empty, click Add User to select the users to add to the list.

4. Click OK.
Setting up review marks

Discovery Accelerator comes with a small number of predefined marks that reviewers can assign to the items that they examine: Relevant, Not Relevant, Pending, and Query. If these marks do not precisely meet your needs, you can set up new ones.

When you have set up the global list of review marks, as described below, case administrators can include them in the marking schemes for their cases.

**To set up a review mark**

1. In the Application Administration column of the Discovery Accelerator home page, click **Marks**.
2. In the Marks page, click **New Mark**.
3. In the New Mark page, type a unique name for the new mark and an optional description.
4. In the **Status applied** box, choose a status to associate with the mark. All marks must map to a status, such as Pending or Reviewed. The status is used to group items together to determine what is included in the production set.
5. In the **Access Key** box, choose a key combination to associate with the mark. When reviewers press an access key in combination with the alt key, they can assign the associated mark to an item in the Review Items page.
6 If you want the mark to work across multiple cases, check **Items retain this mark for use in other cases**. With this option selected, marking an item in one case causes the item to appear marked in other cases as well.

**Note:** Items do not retain their marks across multiple Discovery Accelerator customer databases.

7 Click **OK**.

**Selecting the archives in which to search**

You can customize the list of Enterprise Vault archives in which Discovery Accelerator searches for matching items. For example, there may be archives that you want to exclude from any searches because they contain irrelevant material.

**To select the archives in which to search**

1 Do one of the following:
   - To set the default list of archives available to all cases, click **Vaults** in the **Application Administration** column of the home page.
   - To set the list of archives for one case only, click the case name in the **Case Administration** column, and then click **Vaults** in the case home page.
2 In the Vaults To Search page, choose the archives in which Discovery Accelerator should conduct searches.

Use the following techniques to include or exclude archives:

- Check or uncheck a vault store at the left to include its archives in or exclude them from searches.
- Click a vault store at the left to list the associated archives at the right. Then check or uncheck the archives to include or exclude them.

If Discovery Accelerator lists a large number of archives, you can filter the list with the fields at the top of the right pane.

- Click **Select All** to include all the available archives in searches, or click **Clear All** to exclude them all.

3 Click **OK**.
Searching for case-related items

You can search the Enterprise Vault archives for the items that meet certain criteria, and then add them to the review set for a case. Discovery Accelerator offers a wide range of search criteria: words and phrases to look for, date ranges, message size and type, author and recipient addresses, and attachment details.

If you want to run searches at set times, or you want to set up recurrent searches that run automatically, then you can build search schedules and associate them with your searches. And if you want to search for particular message senders or recipients, you can store their email addresses in Address Manager, ready for selection when you next define the criteria for a search.

Conducting searches

When you have selected the target archives, you can start to conduct searches of the archive contents.

To conduct a search

1. In the Case Administration column of the Discovery Accelerator home page, click the name of the case from which you want to run a search.
2. In the case home page, click Searches.
3. In the Searches page, click New Search.
4 In the New Search page, enter the search criteria.

![Search Page](image)

By default, a search does not check items that you have previously added to the case review set. To search all the items, including those that are already in the review set, check **Include items already in review**.

5 Click **OK** to start an immediate search or queue a scheduled search to start automatically at the appointed time.

6 If you did not check **Automatically accept results** then, when the search has completed, choose whether to accept or reject the results.

   If you click **Accept**, Discovery Accelerator prompts you to assign a default mark and reviewer to the items that it has found.

**Building search schedules**

If you want to run searches at set times, or set up recurrent searches that run automatically, you can create schedules. Then, when setting the criteria for a new search, you can choose the schedule to use.

**Note:** The SQLServerAgent service is responsible for managing search schedules, so you must ensure that this service is running. We also recommend that you configure the service to start automatically when the system starts.
Getting started with Discovery Accelerator

Searching for case-related items

To configure the SQLServerAgent service to start automatically
1. In Control Panel, double-click the Administrative Tools applet.
2. Double-click Services.
3. Right-click SQLSERVERAGENT, and then click Properties.
4. Change the startup type to Automatic.

To build a search schedule
1. In the Application Administration column of the Discovery Accelerator home page, click Search Schedules.
2. In the Search Schedules page, click New Schedule.
3. In the New Search Schedule page, type a name and an optional description for the schedule.
4. Check Enabled so that the schedule is available for selection when you create searches.
5 Select the required schedule type. The options are as follows:

<table>
<thead>
<tr>
<th>Option</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start when SQL Server Agent starts</td>
<td>Causes any searches that use this schedule to run immediately after the SQLServerAgent service is started.</td>
</tr>
<tr>
<td>Start when CPU(s) are idle</td>
<td>Causes any searches that use this schedule to run when the system is quiet. For more information on CPU idle schedules, see the information on how to schedule jobs in the online help for SQL Server Enterprise Manager.</td>
</tr>
<tr>
<td>Once</td>
<td>Causes any searches that use this schedule to run once only, at the time that you set in the schedule. When you select this option, two additional boxes appear. Click the On date calendar to select the required date. Enter the time in the At time box in the format hh:mm, using the 24-hour clock.</td>
</tr>
<tr>
<td>Recurring</td>
<td>Causes any searches that use this schedule to run automatically at the interval that you specify in the schedule. To change the default time and interval, click Change and then enter the required details.</td>
</tr>
</tbody>
</table>

6 Click OK.

Defining email targets with Address Manager

Among the criteria that you can define when you set up a search in Discovery Accelerator are the email addresses for which to look in messages. If an employee has multiple email addresses then, to save you from having to enter them all whenever you set up a search, you can add them to a target entry in Address Manager. Then you can specify the target name in your search criteria as a shorthand way of listing all the associated addresses.

You can collect multiple targets in a target group. For example, you might create a target group that is called "Directors" and add the names of all the company directors to that group. When you need to create a search, you can search for the items that are sent to all the members of the Directors target group.

You can set up targets and target groups at the application level, where they are available to all cases, and at the individual case level.
To add a target or target group to Address Manager

1. Do one of the following:
   - To add an application-wide target or target group, click **Address Manager** in the **Application Administration** column of the Discovery Accelerator home page.
   - To add a case-specific target or target group, click the case name in the **Case Administration** column of the home page, and then click **Address Manager**.

2. In the Address Manager page, click **New Target** or **New Group**, depending on what you want to add.

3. Complete the boxes, and then click **OK**.

**Reviewing the items in a case review set**

Each message in the review set for a case should be assessed by a reviewer. The reviewer reads the message and any attachments, selects the appropriate status mark to assign to the message, and adds a comment as necessary. Messages can be reviewed more than once, and other reviewers can add more comments or change the assigned mark.
Viewing messages in the Review Items page

Discovery Accelerator lets you display an HTML rendering of the selected message, without downloading the original version to your computer. If the message was returned by a search for words or phrases in the subject or content, Discovery Accelerator highlights these words or phrases. However, where several searches have returned the same message, Discovery Accelerator highlights the words and phrases that only the first search has found.

To view messages in the Review Items page

1. In the Review Messages column of the Discovery Accelerator home page, click the name of the required case review set.
2. In the Review page, choose the messages to display, and then click Go. The Review Items page appears.

3. If you have chosen to work in List View mode in the Review Items page, and the preview pane is currently hidden, click [ ] to show the pane and display the contents of the selected message in it. Alternatively, double-click a message to open it in Single Item View mode.

4. If the message has any attachments, click the links at the top of the preview pane to view them. Depending on the attachment type, Discovery Accelerator either displays the contents of the file in the browser window or prompts you to choose a suitable application with which to open it.
Assigning marks and comments to messages

As part of the review process, you assign a status mark to each message to indicate that you have reviewed it and have no concerns—or conversely, that you do have some concerns, and therefore want to question the message.

To assign a mark or comment to a message

1. In the Review Items page, display the message in Single Item View mode, or select the message in List View mode.
   In List View mode, you can mark several contiguous entries at once by holding down the Shift key and clicking the first entry and last entry in the block. To select multiple, non-contiguous entries, hold down the Ctrl key and click the required entries.

2. Click the required mark at the bottom right of the page. After a few moments, Discovery Accelerator changes the status of the message accordingly.

3. If you want to attach a comment to the item, type it in the Comment box at the bottom of the page, and then click Add.
   In List View mode, Discovery Accelerator displays the ✓ symbol in the comment column to indicate that you have added a comment to the message. Click this symbol to view the comment, or select the message and then click ✓.

Checking the progress of reviewers

You may need to monitor the progress of a case with which you are involved. If you have Admin permissions in the case, you can monitor its progress by following the steps below.

To check the progress of a case

1. In the Case Administration column of the home page, click the name of the case whose progress you want to monitor.

2. In the Case home page, click Review Assignment.
3. Assess the information in the Work Assignment page.

4. If you want to assign more items for reviewing to individual users, type the required numbers of items in the Assign boxes, and then click Apply.

**Working with folders**

By creating one or more folders, you can work privately on the messages that interest you without generating additional work for other reviewers. For example, suppose that you are pursuing an alleged instance of insider trading. Rather than add a large number of search results to the case review set, where they are visible to other reviewers, you can conduct the searches from a personal folder and store the results there. Then you can review and mark the messages in the normal way, or export them for offline review.

Where necessary, you can give other users access to your folders so that they can collaborate in the review process. The permissions that you grant these users determine whether they can export messages from the folder, search for more messages to add to it, and review and mark the messages.
Creating folders

Discovery Accelerator provides several methods for creating folders, as described below. In addition to the methods described here, you can also create new folders when you define the criteria for searches or accept the search results.

To create a folder from the Discovery Accelerator home page

1. In the Review Messages column of the Discovery Accelerator home page, click Folders.
2. In the My Folders page, click New Folder.
3. In the New Folder page, type a name for the folder. The name can contain spaces and non-ASCII characters.
4. Select the case with which to associate the folder.
5. Specify the folder in which to store the exported messages. By default, this folder is C:\Discovery Accelerator Export on the server that is running the Discovery Accelerator service. To export messages to another computer, specify the path to a share, as in \my_computer\exports.
6. Click OK.
To create a folder from the Review Items page
1. In the Review Items page, select one or more messages to copy to a new folder.
2. Click the button at the bottom right of the page.
3. In the Copy Items page, click New Folder, and then type a name for the new folder.
4. Choose whether to copy the selected messages only or all the messages in the case review set.
5. Click Copy.

Giving other users access to your folders
You can give other users access to your folders by assigning roles to them. For example, anyone wanting to review and mark the messages in a folder must have the Review role in that folder. Other roles permit users to export messages from the folder and search for new messages to add to it. The Full Control role combines all three of these permissions in one role.

To give another user access to a folder
1. In the Review Messages column of the Discovery Accelerator home page, click Folders.
2. In the My Folders page, click the name of the folder for which you want to assign roles.
3. In the folder home page, click Role Assignment.
4 In the left box in the Folder Assignment page, select the role to assign.

5 In the right box, select the users to whom you want to assign the role. If the list is empty, click Add User to browse for users to include in it.

6 Click OK.

Reviewing the messages in folders

You review the messages in a folder in exactly the same way that you review the messages in the case review set.

You must have the Review permission in the folder to review the messages in it. By default, users with the Folder Full Control or Folder Review role have this permission.

To review the messages in a folder

1 In the Review Messages column of the Discovery Accelerator home page, click Folders.

2 In the My Folders page, click the name of the folder whose messages you want to review.

3 In the folder home page, click Review.

4 In the Review Items page, review the messages as you normally would do.
Undertaking production runs

When you have finished working on the items in a case review set, you can include them in a production run. The process of production copies the original files to a folder that you have specified and gives each of them a Bates number. They are then ready to be presented in evidence to a court or other third party. When you have produced an item, you can still display it in the Review Items page, but you cannot mark it or change its status. If the same item has been captured in another case, its status in that case remains unaffected.

Tip: If you export an item rather than produce it, Discovery Accelerator does not lock the item or generate a Bates number for it. Therefore, you can change the marks or statuses that you have assigned to the item after you have exported it.

To undertake a production run

1. In the Case Administration column of the home page, click the case from which you want to produce messages.
2. In the case home page, click Production.
3. In the Production page, click New Run.
4 In the Production Details page, enter the required run details and filter information.

5 Click Select Items to see the number of messages that you have selected for production.

6 Try different Item Selection values until you are happy with the number of items that you have chosen to produce.

7 Click OK.
8 In the Confirm Production Run page, choose to produce the items in their original format or in an HTML rendering of the items. Choose also to produce Exchange items as individual MSG files or collected in a single PST file.

9 Click **OK**.
Discovery Accelerator begins the run and returns you to the Production page, where you can monitor the progress of the run.

10 When the run has finished, browse to the specified output folder to retrieve the items.
Getting started with Discovery Accelerator

Undertaking production runs
Troubleshooting

This chapter includes the following topics:

- Installation problems
- Problems when running Discovery Accelerator

Installation problems

This section provides guidelines on how to deal with the following problems:

- Enterprise Vault Accelerator Manager Service not created
- EVBA Discovery home page not found
- EVBA Discovery home page stuck in initializing state
- Other applications using TCP/IP port 8085
- Unable to update configuration file

Enterprise Vault Accelerator Manager Service not created

If the installation program is unable to create the Enterprise Vault Accelerator Manager Service, you may need to create the service manually.

To create the Enterprise Vault Accelerator Manager Service manually

1. In Windows Explorer, search the folders under your .NET Framework installation for the file `InstallUtil.exe`.
2. Open a Command Prompt window.
3. Change to the folder that contains `InstallUtil.exe`. 
4 Run the following command:
   `InstallUtil "<InstallFolder>\AcceleratorManager.exe"`
   where `<InstallFolder>` is the path to the Discovery Accelerator program
   folder. For example:
   `InstallUtil "C:\Program Files\Enterprise Vault Business
   Accelerator\AcceleratorManager.exe"`

5 If the command fails, and you have more than one copy of
   `InstallUtil.exe`, try the same command with each of the other copies.

6 If service creation still fails, reinstall the .NET Framework and then type
   the command again using the newly installed copy of `InstallUtil.exe`.

EVBADiscovery home page not found
   If you receive the message Page Cannot Be Displayed when you open the
   Discovery Accelerator home page, start IIS Manager and check that the
   EVBADiscovery virtual directory has been created and that the Web site is
   running. If the installation program failed to create the virtual directory as part
   of the installation process, you can create it manually.

To create the virtual directory manually
   1 In IIS Manager, right-click the container for your default Web site and then
      click New > Virtual Directory.

   2 When the Virtual Directory Creation Wizard appears, click Next.

   3 For the virtual directory alias, type `EVBADiscovery` and then click Next.
4 For the Web site content directory, enter the path to the DiscoveryWeb subfolder of the Discovery Accelerator program folder, and then click **Next**.

5 When you are prompted to set the access permissions for the virtual directory, click **Next** without changing the default permissions.

6 Click **Finish** to close the wizard and create the virtual directory.

To configure the settings for the virtual directory
1 In IIS Manager, right-click the EVBADiscovery virtual directory and then click **Properties**.

2 On the **Virtual Directory** tab of the EVBADiscovery Properties dialog box, do not change the default selections (**Read**, **Log visits**, and **Index this resource**), but do remove the entry in the **Application name** box and ensure that the application pool is set to **EVAcceleratorAppPool**.

3 On the **Documents** tab, remove all the entries in the **Enable default content page** box, and then add **Login.aspx**.

4 On the **Directory Security** tab, click **Edit** under **Authentication and access control**.
5 In the Authentication Methods dialog box, uncheck **Enable anonymous access** and check **Integrated Windows authentication**. (You can select **Basic authentication**, but it is less secure.)

![Authentication Methods Dialog Box]

6 Click **OK** to save the changes you have made to the Authentication Methods dialog box.

7 Click **OK** to close the EVBADiscovery Properties dialog box.

8 Check that the Web site is running.

9 In Internet Explorer, open the Discovery Accelerator home page, and then follow the on-screen instructions.

**EVBADiscovery home page stuck in initializing state**

If the Discovery Accelerator home page is stuck in the initializing state when you start it, try adding the site to the Trusted Sites zone in Internet Explorer.

**To add the Discovery Accelerator Web site to the Trusted Sites zone**

1 In Internet Explorer, click **Tools > Internet Options**.

2 Click the **Security** tab.

3 Click the **Trusted sites** security zone.

4 Click **Sites**.

5 In the **Add this Web site to the zone** text box, type the address of the Discovery Accelerator Web site, and then click **Add**.
Other applications using TCP/IP port 8085

Discovery Accelerator uses TCP/IP port 8085 by default. However, if another application on the Discovery Accelerator computer needs to use this port, you can set Discovery Accelerator to use a different one.

Remember that you should not run Discovery Accelerator and Compliance Accelerator concurrently on the same computer.

To change the port that Discovery Accelerator uses

1. Open the file `AcceleratorService.exe.config` in a text editor. This file is in the Discovery Accelerator program folder.
2. Find the following line, and change the port number to a suitable alternative.
   `<add value="name=Client Port, port=8085...`
3. Save and close the file.
4. Repeat step 1 through step 3 for the `AcceleratorManager.exe.config` file.
5. Open the file `Web.config` in a text editor. This file is in the DiscoveryWeb subfolder of the Discovery Accelerator program folder.
6. Find the following line, and change the port number to a suitable alternative.
   `<add key="RemotePort" value="8085"/>
7. Save and close the file.
8. Restart the Enterprise Vault Accelerator Manager service.

Unable to update configuration file

When you configure or upgrade Discovery Accelerator, the following error message may be sent to the event log:

An Error has occurred when updating the configuration file:
<InstallFolder>/DiscoveryWeb/web.config

This message may indicate that the IIS worker process does not have write access to the Discovery Accelerator program folder.
Troubleshooting
Installation problems

To set the correct permissions on the Discovery Accelerator program folder

1. On the IIS computer, do one of the following:
   - If you are running IIS 5.0 (Windows Server 2000), open Task Manager and identify the user under which ASPnet_wp.exe is running. This user is typically IWAM_<computername>.
   - If you are running IIS 6.0 (Windows Server 2003), use IIS Manager to determine the application pool identity. This identity is the name of the account under which the application pool’s worker process runs.

2. On the computer running Discovery Accelerator, open the properties sheet for the Discovery Accelerator program folder.

3. Click the Security tab.

4. Add the user that you identified in step 1, and give the user Full Control.

5. Click Advanced.

6. Check Allow inheritable permissions from the parent to propagate to this object.

7. Close the properties sheet.
Problems when running Discovery Accelerator

This section provides guidelines on how to deal with the following problems:

- Vault stores not displayed
- Unable to select message type
- Search returns unexpected results
- Unable to view HTML items in the Review Items page
- Review Items page preferences not saved
- Messages locked in Review Items page
- Errors when exporting message
- Timeout errors

Vault stores not displayed

If no vault stores and archives are displayed in the Discovery Accelerator vaults page, check that the Enterprise Vault Directory service is running.

Unable to select message type

When you specify the criteria for a search, you may find that you cannot select a message type. Ensure that the start date you specify in the date range is after the date on which you installed Enterprise Vault 5.0. Earlier versions of Enterprise Vault did not add information to messages about the message type.

To specify the installation and oldest archived item dates in the Discovery Accelerator database

1. In the Application Administration column of the Discovery Accelerator home page, click System Configuration.
2. In the Settings for box in the System Configuration page, click System.
3. In the Enterprise Vault Oldest Archived Item Date row, click Edit.
4. Enter the date on which Enterprise Vault archived the oldest available data.
5. Click OK to save the change that you have made.
6. In the Enterprise Vault V5 Installation Date row, click Edit.
7. Enter the date on which you first installed Enterprise Vault 5.0 or later.
8 Click OK to save the change that you have made.

9 Click OK at the bottom of the page to exit from the System Configuration page and return to the previous page.

If the Oldest Archived Item Date and V5 Installation Date are the same then, when you enter the criteria for a search, you can specify the message type without also specifying a start date. (Discovery Accelerator does not return any pre-5.0 data.) However, if the Oldest Archived Item Date is earlier than the V5 Installation Date, you can only specify the message type if you specify a start date that is on or after the V5 Installation Date.

Search returns unexpected results

Symantec Support may request a search criteria file if you report a problem with searches that return unexpected results.

To generate the search criteria file

1 In the Application Administration column of the Discovery Accelerator home page, click System Configuration.

2 In the Settings for box in the System Configuration page, click Diagnostics.

3 In the Save Search Criteria row, click Edit.

4 Check the option in the Value column.

5 Click OK to save the change you have made.

6 Click OK at the bottom of the page to exit from the System Configuration page and return to the previous page.

7 Restart the Enterprise Vault Accelerator Manager Service.

8 Rerun the searches.

Discovery Accelerator creates a file that is called Criteria_<SearchID>.txt in the SearchCriterias subfolder of the Discovery Accelerator program folder. If there are several files in the folder, you can identify the associated searches by hovering the mouse pointer over the search names in the Discovery Accelerator search list page. The SearchID of each search then appears in the status bar.

Unable to view HTML items in the Review Items page

Check the permissions on the Windows and ASP.NET Temp folders, as described on “Setting the Temp folder permissions” on page 17.
Review Items page preferences not saved

You can assign reviewer permissions to a Windows group, so the situation can arise where a member of the group has reviewer permissions but does not have an employee profile in Discovery Accelerator. Where this is the case, the Review Items page preferences for such users are not saved.

Messages locked in Review Items page

If one reviewer cannot view a message in the Review Items page because another is currently accessing the message, the first reviewer must wait for the second to exit the page and release the lock on the message.

If a message is locked and no reviewer is currently accessing it, contact Symantec Support for assistance with unlocking the message.

Errors when exporting message

If you receive the following error message when exporting messages, the version of mapisvc.inf on the Discovery Accelerator server may be incorrect.

Error    Failed to write the file: The EVPSTAPI COM object has not been initialized

To fix MAPI problems

1. In Windows Explorer, browse to the %windir%\system32 folder.
2. Double-click fixmapi.exe to run the MAPI repair tool. (Note that this tool does not appear to do anything when you run it.)
3. Restart the Discovery Accelerator server.
4. Test whether the problem has been fixed.

If running FIXMAPI.EXE does not solve the problem

1. In the %windir%\system32 folder, rename the existing mapisvc.inf file.
2. Copy the version of mapisvc.inf that comes with Microsoft Outlook to the %windir%\system32 folder. This version is typically in the following folder:
   C:\Program Files\Common Files\System\MSMAPI\1033\MAPISVC.INF
3. Restart the Discovery Accelerator server.
Troubleshooting

Problems when running Discovery Accelerator

Timeout errors

If you have many items in your Discovery Accelerator database, and the Web interface displays a general timeout error, identify the application that is responsible for the error and then increase the appropriate timeout value.

To identify the application responsible for the error
1. Open the `Web.config` file in a text editor. This file is in the `DiscoveryWeb` subfolder of the Discovery Accelerator program folder.
2. Find the line that starts `<customErrors mode="On"` and set the mode to `Off`. Note that this setting is case-sensitive.
3. Save and close the file.
4. Close all browser sessions, and then open a new one.
5. Repeat the steps in Discovery Accelerator that caused the timeout error to appear. The message that is displayed should now indicate whether an HTTP or SQL timeout error occurred.

To resolve HTTP timeout errors
1. Open the `Web.config` file in a text editor.
2. Find the `httpRuntime` section. By default, `executionTimeout` is set to 300 seconds.
3. Increase the timeout value as required.
4. Save and close the file.
5. Close all browser sessions, and then open a new one.

To resolve SQL timeout errors
1. Open the `AcceleratorService.exe.config` file in a text editor. This file is in the Discovery Accelerator program folder.
2. Find the `DSNConfiguration` line. By default, `Connection Timeout` is set to 100 seconds.
3. Increase the timeout value as required.
4. Save and close the file.
5. Repeat step 1 through step 4 for the `AcceleratorManager.exe.config` file.
6. Restart the Enterprise Vault Accelerator Manager Service.
Importing data from XML files

This appendix includes the following topics:

- Bulk loading configuration data
- Using the ImportExport command
- Customizing the columns in the Review items page

Bulk loading configuration data

Rather than manually configure roles, users, and cases through the appropriate pages in the Discovery Accelerator Web interface, you can construct an XML file that contains this configuration data and import it into the Discovery Accelerator database. You can use this facility to load either the initial data for your organization or updates to existing data.

An example file, Dataload.xml, is included in the DiscoveryWeb\Installation subfolder of the Discovery Accelerator program folder (typically C:\Program Files\Enterprise Vault Business Accelerator).

Format of the Dataload.xml file

You can use the Dataload.xml file with both Discovery Accelerator and Compliance Accelerator, so it contains information that is applicable to both applications. However, the file is well documented and shows which sections apply to Discovery Accelerator.
The first part of the file shows the general structure of the XML entries. The following Discovery Accelerator sections are included.

<table>
<thead>
<tr>
<th>Section</th>
<th>Defines</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>&lt;ApplicationVaultStore&gt;</code></td>
<td>Vault stores available to all cases for searching.</td>
</tr>
<tr>
<td><code>&lt;Employee&gt;</code></td>
<td>Users to add to the system as administrators or reviewers, and the application administration roles to assign to them.</td>
</tr>
<tr>
<td><code>&lt;ApplicationTarget&gt;</code></td>
<td>Targets and their email addresses. These will be available in all cases.</td>
</tr>
<tr>
<td><code>&lt;ApplicationTargetGroup&gt;</code></td>
<td>Groups of targets. These will be available in all cases.</td>
</tr>
<tr>
<td><code>&lt;Department&gt;</code></td>
<td>Cases. This section includes definitions of the following:</td>
</tr>
<tr>
<td></td>
<td>■ Case users</td>
</tr>
<tr>
<td></td>
<td>■ Case roles that are assigned to individuals</td>
</tr>
<tr>
<td></td>
<td>■ Vault stores for the case</td>
</tr>
<tr>
<td></td>
<td>■ Case targets and target groups</td>
</tr>
</tbody>
</table>

The second part of the file describes each XML entry. Read the information in the sections that are marked for DISCOVERY ONLY or COMPLIANCE & DISCOVERY. The last part of the file provides sample entries for a Discovery Accelerator system.

If you use any non-ASCII characters in a dataload file, you must specify the appropriate encoding. For example, you can save a file that contains accented European characters in Unicode format or add the following at the start of the file:

```xml
<?xml version="1.0" encoding="iso-8859-1" ?>
```
Importing data from XML files

When you have created the XML file, you can import it into Discovery Accelerator.

To import the data

1. In the **Application Administration** column on the Discovery Accelerator home page, click **Import Configuration Data**.

2. In the **Configuration file** box in the Import Configuration Data page, type the path to the XML file. Alternatively, click **Browse** and then choose the file to import.

3. If you want to overwrite any existing information in the import log, check **Clear log before import**. To append new log information to the log, uncheck **Clear log before import**.

4. If you want to display the log automatically once Discovery Accelerator has imported the data, check **Show log after import**. Alternatively, you can click **View Import Log** when the import process has finished to open the log.

5. Click **OK**.
Using the ImportExport command

The ImportExport command provides a command-line alternative to the Web interface for importing data into the Discovery Accelerator configuration database. It also lets you export the data from the database to an XML file.

The command is installed in the Discovery Accelerator program folder, together with a configuration file, ImportExport.exe.config.

Note: You must have Administrator privileges to run ImportExport.

Syntax

```
```

where the parameters are as described in the following table.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>-F:&lt;FileName&gt;</td>
<td>Identifies the XML file from which to import data or to which the data is to be exported.</td>
</tr>
<tr>
<td>-C:&lt;CustomerID&gt;</td>
<td>Identifies the Discovery Accelerator customer for which to import or export data. To verify the customer ID, use SQL Server Enterprise Manager to view the data in the tblCustomer table of your Discovery Accelerator database.</td>
</tr>
<tr>
<td>-I</td>
<td>Instructs the command to import configuration data into the Discovery Accelerator database from the XML file that you specify with the -F parameter. Omit this parameter to export data to the specified XML file.</td>
</tr>
<tr>
<td>-L:&lt;LogFile&gt;</td>
<td>Specifies the name of the log file. If you omit the path to the file, the command creates it in the Discovery Accelerator program folder.</td>
</tr>
<tr>
<td>-O</td>
<td>Overwrites the output XML file (if exporting) and log file, if they exist. If you omit this parameter, and the output and log files exist, the command displays an error message and stops.</td>
</tr>
</tbody>
</table>
## Importing data from XML files

### Using the ImportExport command

- **-NoValidation**
  
  Accelerates the process of importing data from an XML file by turning off XML validation. The command ignores this parameter if you export data to a file.

- **-BypassService**
  
  Instructs the command to bypass the Discovery Accelerator service and connect directly to the database. To use this facility, you must ensure that:
  - You have access permissions to the database.
  - The `ImportExport.exe.config` file specifies the SQL Server for the Discovery Accelerator database as the DSN key. Each time you start the Discovery Accelerator service, it automatically updates the DSN key value in this file to match the value that is specified in `AcceleratorManager.exe.config` and `AcceleratorService.exe.config`. So, if you specify a different value in `ImportExport.exe.config`, it is overwritten when you next start the service.

- **-LogToDB**
  
  Writes the log messages to both the log file and the Discovery Accelerator database, where they are visible when you use the Discovery Accelerator Web interface.

- **-LeaveDBLog**
  
  If you also specify the `-LogToDB` parameter, instructs the command to leave log information on previous imports and exports in the Discovery Accelerator database instead of overwriting it.

- **-ShowOnlyErrors**
  
  If you also specify the `-LogToDB` parameter, instructs the command to report error messages but not information messages.

- **-CommitOnceOnSuccess**
  
  Commits the data to the Discovery Accelerator database only if the command imported it without error.

- **-?**
  
  Displays the online help information for the command.

### Table A-2: ImportExport command parameters

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>-NoValidation</code></td>
<td>Accelerates the process of importing data from an XML file by turning off XML validation. The command ignores this parameter if you export data to a file.</td>
</tr>
<tr>
<td><code>-BypassService</code></td>
<td>Instructs the command to bypass the Discovery Accelerator service and connect directly to the database.</td>
</tr>
<tr>
<td><code>-LogToDB</code></td>
<td>Writes the log messages to both the log file and the Discovery Accelerator database, where they are visible when you use the Discovery Accelerator Web interface.</td>
</tr>
<tr>
<td><code>-LeaveDBLog</code></td>
<td>If you also specify the <code>-LogToDB</code> parameter, instructs the command to leave log information on previous imports and exports in the Discovery Accelerator database instead of overwriting it.</td>
</tr>
<tr>
<td><code>-ShowOnlyErrors</code></td>
<td>If you also specify the <code>-LogToDB</code> parameter, instructs the command to report error messages but not information messages.</td>
</tr>
<tr>
<td><code>-CommitOnceOnSuccess</code></td>
<td>Commits the data to the Discovery Accelerator database only if the command imported it without error.</td>
</tr>
<tr>
<td><code>-?</code></td>
<td>Displays the online help information for the command.</td>
</tr>
</tbody>
</table>
Importing data from XML files

Customizing the columns in the Review items page

Examples

The following command imports unvalidated data from the file `dadata.xml`, which is in the folder `C:\temp`. The log file, `import.log`, contains error messages only, and the command overwrites the previous contents of the log file as it imports the XML data.

```cmd
ImportExport.exe -C:2 -I -F:C:\temp\dadata.xml -NoValidation -O -L:import.log -ShowOnlyErrors
```

The following command exports the data in the Discovery Accelerator database to the XML file `daexport.xml`, which is in the Discovery Accelerator program folder. The command also overwrites the error messages that it has previously logged in the database.

```cmd
ImportExport.exe -F:daexport.xml -LogToDB -LeaveDBLog -ShowOnlyErrors
```

Customizing the columns in the Review items page

Each reviewer can hide or show columns in the Review Items page by right-clicking the column header and then clicking **Select Columns**. The reviewer can also change the column order by dragging and dropping the column headers. However, the changes that a reviewer makes in these ways are available to that reviewer only, and they are discarded when the reviewer ends the session.

If you want to customize the default column layout on the Review Items page for all Discovery Accelerator users, you must set up an XML configuration file as described below. Note that reviewers can still change their column layout on the Review Items page by using the **Select Columns** menu and drag-and-drop.

To configure the default column layout in the Review items page

1. In the **Application Administration** column of the Discovery Accelerator home page, click **System Configuration**.
2. In the **Settings for** box of the System Configuration page, click **Reviewing**.
3. In the **Review Grid File** row, click **Save as**.
   - Discovery Accelerator prompts you to open or save the XML file.
4. Edit the file as necessary, using the information at the start of the file to guide you.
   - In brief, each column that you want to display must have the attribute `visible='true'`. This is either because you have specified the attribute in the configuration file or because `true` is the default setting for the column.
   - The order of the configuration lines determines the left-to-right order of the columns in the Review Items page.
The following table lists the columns that you can display, the name to use when you refer to the column in the XML file, and whether the column is displayed on a new system.

The XML file must contain at least one configuration line between the `<reviewgrid>` and `</reviewgrid>` tags.

<table>
<thead>
<tr>
<th>Column header in Review Items page</th>
<th>Name to use in XML file</th>
<th>Visible on new system</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attachments</td>
<td>Attachments</td>
<td>Yes</td>
</tr>
<tr>
<td>Comment Present</td>
<td>CommentPresent</td>
<td>Yes</td>
</tr>
<tr>
<td>From</td>
<td>From</td>
<td>Yes</td>
</tr>
<tr>
<td>To</td>
<td>To</td>
<td>No</td>
</tr>
<tr>
<td>Subject</td>
<td>Subject</td>
<td>Yes</td>
</tr>
<tr>
<td>Date</td>
<td>Date</td>
<td>Yes</td>
</tr>
<tr>
<td>Action Status</td>
<td>Status</td>
<td>Yes</td>
</tr>
<tr>
<td>Last Reviewed by</td>
<td>ReviewerPrincipalName</td>
<td>No</td>
</tr>
<tr>
<td>Item ID</td>
<td>DiscoveredItemID</td>
<td>No</td>
</tr>
<tr>
<td>Comment</td>
<td>Comment</td>
<td>No</td>
</tr>
<tr>
<td>Last Commented by</td>
<td>CommentPrincipalName</td>
<td>No</td>
</tr>
<tr>
<td>Mark</td>
<td>Mark</td>
<td>Yes</td>
</tr>
<tr>
<td>Assigned to</td>
<td>AssignedTo</td>
<td>No</td>
</tr>
</tbody>
</table>

5. Save the file.
6. In the **Review Grid File** row in the System Configuration page, click **Edit**.
7. Enter the path to the XML file, or click **Browse** to search for the file.
8. Click **OK** at the right of the row to save the changes that you have made.
9. Click **OK** at the bottom of the page to exit from the System Configuration page and return to the previous page.
10. Close all browser sessions, and start a new Discovery Accelerator session to see the column changes.
Importing data from XML files

Customizing the columns in the Review items page
Running Discovery Accelerator in a Web Farm

This appendix includes the following topics:

- About Web Farms
- Overview of the setup procedure
- Creating a Load Balancing Cluster
- Configuring the cache dependencies in the Web Farm
- Suppressing View State error messages
- Setting up Discovery Accelerator customers
- Using Kerberos for authentication

About Web Farms

A Web Farm is a collection of servers that act together as a single Web server. The cluster of servers has a common virtual IP address. When a client makes a request to a Web site, this request is first resolved to the virtual address and then routed to one of the servers in the farm.

A Web Farm configuration lets you distribute the processing load across several servers, thereby enhancing the scalability and availability of your server applications. If a server in the farm becomes unavailable, the rest of the servers continue to serve requests, and the client is unaware that one of the servers has failed.
Overview of the setup procedure

In brief, the procedure for setting up Discovery Accelerator to run in a Web Farm is as follows:

2. Configure the cache dependencies in the Web Farm.
3. Set up Discovery Accelerator customers.

The following sections describe these steps in more detail.

Creating a Load Balancing Cluster

As the first stage in setting up a Web Farm, you must create a Load Balancing Cluster with a virtual IP address. For example, if you use Windows Server 2003, you can run the accompanying Network Load Balancing Manager application to set up the farm.

Install the Discovery Accelerator client on every server in the Web Farm. As an alternative to running the installation program on each server, you can use XCOPY to deploy the contents of the following folder from the Discovery Accelerator kit to each server:

\Discovery Accelerator 6.0\Kit\Program Files\Enterprise Vault Business Accelerator\DiscoveryWeb

Configuring the cache dependencies in the Web Farm

A requirement of running Discovery Accelerator in a Web Farm is that you must use either ASP.NET State Service or SQL Server to store the session state. In addition, you must configure all the servers in the Web Farm to prevent stale data from being stored in the numerous application caches in the farm.

To configure the cache dependencies in a Web Farm

1. Open the two Web.config files in a text editor. These files are in the AcceleratorAdminWeb and DiscoveryWeb subfolders of the Discovery Accelerator program folder.

2. Find the Cache dependency location key, and specify as its value the path to a shared network folder. For example:

    <add key="Cache dependency location" value="\MyServer\DiscoveryCache"/>

3. Save and close the files.
4 Repeat step 1 through step 3 for each server in the Web Farm. Take care to specify the same location in every case.

You must run Discovery Accelerator under a domain account that has full control over this shared network folder. How you configure this account depends on the version of IIS that you use and the mode in which it is running.

If you use IIS 5.0, or IIS 6.0 running in IIS 5.0 isolation mode

1 Open the .NET machine.config file in a text editor. This file is typically in the following folder:
   C:\WINDOWS\Microsoft.NET\Framework\v2.0...\CONFIG

2 Find the <processModel> key.

3 Add a userName attribute to this key, and specify as its value the name of a domain account that is a member of the IIS_WPG group.

If you use IIS 6.0 running in native mode

1 Using IIS Manager, create a new application pool for Discovery Accelerator under the identity of your chosen domain account.
2 In the properties sheets of the EVBADiscovery and EVBAAdmin virtual directories on each server in the Web Farm, set the application pool to the one that you created.

Suppressing View State error messages

View State is the mechanism that ASP.NET uses to maintain the state of controls in its Web pages as they travel back and forth between client and server. Problems can arise in a Web Farm configuration when one Web server cannot validate the machine key that another server has appended to the View State information. You can address this issue in two ways: explicitly specify the same machine key value in the configuration files on each server, or disable View State validation altogether.
Running Discovery Accelerator in a Web Farm

Setting up Discovery Accelerator customers

To suppress View State error messages during a Discovery Accelerator session, do one of the following:

- Using a machineKey generator (freely available from various Web sites), generate random machine keys for validation and encryption or decryption of the view state. Then paste the keys into the `<system.web>` section of both Web.config files, as in the following example:

  `<machineKey
    validationKey="21F090935F6E49C2C797F69BAAAD8402ABD2EEB667A8B44
    EA7D04374267A75D7AD972A119482D15A4127461DB1DC347C1A63AE5F1CCFAA
    CFF1B72A7F0A281B"
    decryptionKey="ABAA84D7ECB56D75D217CECFB9628809BB8BFB91CFCD6
    4568A145BE597F" />
  `/>

  Finally, copy the updated Web.config files to each Web site on each server in your Web Farm. By explicitly defining the machineKey value, you ensure that every server in the farm can decrypt the View State that is created on the other servers. This method is the recommended method because it is more secure.

- Disable View State validation by adding the following line to the `<system.web>` section of both Web.config files:

  `<pages enableViewStateMac="false" />
  `

  This method is not recommended because it can introduce security holes. Attackers can now tamper with the View State data and put arbitrary data in View State.

Setting up Discovery Accelerator customers

You can set up Discovery Accelerator customers in the normal way, using the Discovery Accelerator Administration Web site (typically http://<servername>/EVBAAdmin). However, you must take some additional steps to create the IIS virtual directory and a configuration file, remoting_virtualdirectory.config, on each server in the Web Farm.

To create the IIS virtual directory and configuration file on each server

1. In the Create Customer page of the Discovery Accelerator Administration Web site, specify the details of the customer.
2. In the **IIS Server** box, specify one of the servers in the Web Farm.

3. Click **OK**.
   The virtual directory and configuration file are created on the specified server.

4. Repeat step 2 and step 3 for all the other servers in the Web Farm.

   **Caution:** Do not specify the virtual host.

When you have completed these steps, use IIS Manager to restart IIS on each server in the Web Farm.
Using Kerberos for authentication

Kerberos is a computer network authentication protocol that lets individuals communicate over an insecure network to prove their identity to one another in a secure manner. You can implement Kerberos authentication on the servers in your Discovery Accelerator Web Farm.

To use Kerberos, do the following on each server in the Web Farm

1. Open the two Web.config files in a text editor. These files are in the AcceleratorAdminWeb and DiscoveryWeb subfolders of the Discovery Accelerator program folder.

2. Find the Remoting Configuration key, and set the values of its attributes as follows:

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Required value</th>
</tr>
</thead>
<tbody>
<tr>
<td>tokenImpersonationLevel=</td>
<td>Delegation</td>
</tr>
<tr>
<td>servicePrincipalName=</td>
<td>The login name and domain of the Vault Service account, in the form name@domain.</td>
</tr>
</tbody>
</table>

For example, you could set the key to the following:
<add key="Remoting Configuration" value="name=Client Port, ref=tcp, secure=true, tokenImpersonationLevel=Delegation, servicePrincipalName=srv_ev@evdemo, ...

3. Save and close the files.

4. In Active Directory Users and Computers, ensure that the following applies:
Each server in the Web Farm is trusted for delegation. For example:

The Vault Service account is trusted for delegation. In addition, you must ensure that the option **Account is sensitive and cannot be delegated** is unchecked for this account. For example:

Note that Discovery Accelerator clients that are not in a Windows 2003 domain will fail Kerberos delegation.
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   enabling on Windows 2003 15
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   configuration options 11
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