

IBM StoredIQ eDiscovery

*User Guide*



**Note**

Before using this information and the product it supports, read the information in [Notices](#).

This edition applies to Version 7.6.0.16 of product number 5724M86 and to all subsequent releases and modifications until otherwise indicated in new editions.

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## About this publication

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*IBM StoredIQ eDiscovery User Guide* describes how to use the eDiscovery application to capture and manage the electronic data for your business need.

## IBM StoredIQ Platform product library

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The following documents are available in the IBM® StoredIQ® Platform product library.

- *IBM StoredIQ Platform Deployment and Configuration Guide*
- *IBM StoredIQ Platform Overview Guide*
- *IBM StoredIQ Platform Data Server Administration Guide*
- *IBM StoredIQ Administrator Administration Guide*
- *IBM StoredIQ Data Workbench User Guide*
- *IBM StoredIQ eDiscovery User Guide*
- *IBM StoredIQ Policy Manager User Guide*

## Contacting IBM StoredIQ customer support

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For IBM StoredIQ technical support or to learn about available service options, contact IBM StoredIQ customer support at this phone number:

- 1-866-227-2068

Or, see the Contact IBM web site at <http://www.ibm.com/contact/us/>.

### **IBM Knowledge Center**

The IBM StoredIQ publications can be found from [IBM Knowledge Center](#).

## Contacting IBM

For general inquiries, call 800-IBM-4YOU (800-426-4968). To contact IBM customer service in the United States or Canada, call 1-800-IBM-SERV (1-800-426-7378).

For more information about how to contact IBM, including TTY service, see the Contact IBM website at <http://www.ibm.com/contact/us/>.



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# Overview of IBM StoredIQ eDiscovery

IBM StoredIQ eDiscovery is designed for the legal users to manage their electronic data. With this application, you can capture and control the data to communicate with other users about the work status and case review process.

IBM StoredIQ eDiscovery identifies and catalogs data or types of data that can eventually be responsive to legal matters. The data that is collected and retained by IBM StoredIQ eDiscovery is then produced in a way that matches accepted or required legal practices.

IBM StoredIQ eDiscovery can be used to accomplish any of these tasks:

- Create a matter for a lawsuit.
- Create boxes to contain emails and reports about cases.
- Visualize the status of the different active matters.
- Communicate with emails directly from the application to discuss any questions about a matter or through the user notification that is sent to the data expert who receives it in the **My Request** box in IBM StoredIQ Data Workbench.

Before you use IBM StoredIQ eDiscovery, ensure that you meet these prerequisites:

- The IBM StoredIQ Platform must be deployed, configured, and ready for use.
- IBM StoredIQ eDiscovery is dependent upon other IBM StoredIQ products such as IBM StoredIQ Administrator and IBM StoredIQ Data Workbench.

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# Actions on a matter

Provides instructions about how to manage matters on the Matter Dashboard.

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## Matter Dashboard view

The Matter Dashboard provides a high-level overview of matters within IBM StoredIQ eDiscovery. It helps you to find and identify matters of interest.

A matter is a central container object within IBM StoredIQ eDiscovery. You can organize all information that pertains to a potential or active legal matter. Matters can be seen on the matter dashboard. It shows a matter's status while it provides critical pieces of information for each matter: its matter and box navigation trail, its name, a brief description, its creation date and time, and a visual cue about its status. It also provides insight into the contents of the matter, including what boxes and reports it contains and relevant contacts for the matter. Matters are listed according to the time sequence of their creation. From the Matter Dashboard, you can do the following tasks:

- View a matter by clicking the matter that you want to see.
- Search for a matter by filtering the existing matters.
- Add a matter by clicking **Create Matter**.

### View of a matter

Through accessing the matter, you can view the contents of an existing matter such as its boxes and reports.

On the Matter Dashboard, double-click the matter that you want to view. The matter opens on the **Matter Details** page.

### Emailing the contact person of a matter

You can email the contact person of a matter by clicking the name of that person on the Matter Dashboard.

1. From the Matter Dashboard, find the matter that contains the contact person you want to email.
2. In the Contacts area of that matter, click the name of the individual you want to email. An email to that individual automatically opens in your email client with the matter's name as the subject of the email.

**Note:** The Data Expert for a box can also be emailed by clicking **Contact Data Expert** on the matter's Boxes and Reports page.

### Filtering for a matter

You can filter for a specific matter within existing matters from the **Matter Dashboard**.

1. From the **Matter Dashboard**, in the **Enter key term(s)** text box, enter the name of the matter for which you want to filter, and then press **Search**. You can enter either the full matter name or a portion of it. Only matter names that match the filter entry are displayed in the list. Matters that match the entered search term are returned.
2. View the matter by double-clicking it within the Matter Dashboard.
3. To remove the search term, click the **X** to the right of the text box.

### Adding a matter

A matter is a container that encapsulates all data that you are gathering for a specific legal case. It can also contain some constraining parameters such as matter dates and identifying information like the



matter's name and description. Matters are an essential component of using IBM StoredIQ eDiscovery and can be added from the **Matter Dashboard**.

1. Within the **Matter Dashboard**, click **Create Matter**.  
The Create Matter dialog box appears. The Create Matter dialog box has four fields: **Name**, **Description**, **Data Expert Contact**, and **Legal Ops Contact**.
2. In the **Name** text box, enter a unique name for this matter.  
This name appears on the **Matter Dashboard** page, providing you an easy way to identify the matter.
3. In the **Description** text box, enter a unique description of this matter.
4. In the **Data Expert Contact** text box, select the user that serves as the Data Expert for this matter.  
The users in this list are populated with the IBM StoredIQ Administrator user management feature.
5. In the **Legal Ops Contact** text box, select the user that serves as the Legal Operations contact for this matter.  
The users in this list are populated with the IBM StoredIQ Administrator user management feature.
6. Click **Save**.  
The newly created matter appears within the **Matter Dashboard**. When you have a matter, then you can create boxes and manage your e-discovery process.

## Deleting a matter

Matters can be deleted from the **Matter Dashboard**.

1. Within the **Matter Dashboard**, place your mouse over the matter you want to delete.
2. Click **Delete**, which appears within the **Contact** tile.  
The Delete Matter confirmation box appears.  
**Note:** You cannot delete a matter that has a box in a pending state.
3. Within the Delete Matter confirmation box, click **Delete**, and the matter is removed from the **Matter Dashboard**.

# Matter configuration

Matters are the basis of any e-discovery work. Through matter configuration, you can tune them to meet your legal needs.

## Editing a matter

Use the following procedure to edit an existing matter.

1. Within the **Matter Dashboard**, double-click the matter that you want to edit.  
The matter opens, showing both the **Matter Dashboard** for the selected matter and the matter's boxes and reports.
2. In the upper right-hand corner, click **Edit Matter**.  
The Edit Matter dialog box appears.
3. Edit the matter as needed, changing the name or description of the matter.
4. Click **Save**.

## Deleting a matter

Matters can be deleted from the **Matter Dashboard**.

1. Within the **Matter Dashboard**, place your mouse over the matter you want to delete.
2. Click **Delete**, which appears within the **Contact** tile.  
The Delete Matter confirmation box appears.

**Note:** You cannot delete a matter that has a box in a pending state.

3. Within the Delete Matter confirmation box, click **Delete**, and the matter is removed from the **Matter Dashboard**.

## Creating a box

A box is a container for requested data within a matter. It serves as the object of reference as you move from managing information through to data identification, collection, and export.

Boxes are created within matter from the **Boxes and Reports** page, which has four areas: **Boxes**, **Summary**, **Reports**, and **Available Actions**.

### Box

This table describes the fields that appear on the left side of the Matter Overview screen, labeled **Boxes**.

Table 1: Box table fields and descriptions	
Field Name	Description
Name	The name of the box within the matter.
Type	A list of the type of the box. Options include <b>Identification</b> , <b>Export</b> , and <b>Collection</b> .
Created	A list of the date and time at which the box was created.
Status	The system status of the box. Options include <b>Active</b> , <b>Pending</b> , or <b>Declined</b> if the request was rejected by the data expert. If the box is in a <b>Pending</b> or <b>Declined</b> state, certain links such as File List and Data Map can be disabled.

Table 1: Box table fields and descriptions (continued)	
Field Name	Description
Total Box Objects	This field lists the total number of data objects in the selected box. If a box is selected in the table, then the counts in this field update to reflect the selected box.
Estimated Total Box Size	This field lists the estimated total size of data objects in the selected box. If a box is selected in the table, then the counts in this field update to reflect the selected box.

### Selecting a box

- In the **All Boxes** list, select the type of box you want to view. Options include **All Boxes**, **Identification Boxes**, **Collection Boxes**, and **Export Boxes**.
  - Identification Boxes:** Identifying data is a key step in the e-discovery process that is based on several methods, including custodians and matter terms. An Identification Box is the initial type of box that is created when you are configuring a matter, and it is key to defining the data within a matter.
  - Collection Boxes:** A Collection Box collects data for preservation when it is approved.
  - Export Boxes:** An Export Box retains specific data when it is approved for export.
- Depending on the selection that you made, boxes of that type appear in the **Boxes** table.

**Note:** By default, the only type of box you can create is an Identification Box. When you create an Identification Box, you can create a Collection Box or Export Box that is based on the original Identification Box.

### Summary

This table describes the **Summary** area on the right side of the Matter Overview screen.

Table 2: Summary options and descriptions	
Field Name	Description
Name	The name of the selected box.
Description	The description of the selected box.
Details	Provides links to detailed data for the box, including <b>File List</b> and <b>Data Map</b> . When a box is in a pending state, these links are disabled.
Started	The created date and time of the box.
Status	The system status of the selected box is <b>Active</b> , <b>Pending</b> , or <b>Declined</b> if the request was rejected by the data expert.

### Reports

This table describes the **Reports** area on the right side of the Matter Overview screen.

Table 3: Reports options and descriptions	
Field Name	Description
Name	The name of the report.
Created	The creation date and time of the report.
Overall Status	The creation status of the report. Options include <b>Complete</b> or <b>Pending</b> .

## Available Actions

This area provides links to what actions can be taken on a selected box. From here, you can click a link to act on a box. These link options are available:

- Create Identification Box
- Refine this box
- Restart this box
- Create a Collection Box that is based on this box
- Create an Export Box that is based on this box
- Clone this box
- Run a report on this box
- Deleting this box

## Creating an identification box

1. Select the matter in which you want to create a box.
2. Click **Create Identification Box**. The Create Box dialog box appears. Five subtabs in the Create Identification Box dialog box are **Base Information**, **Where and When**, **Who**, **Terms**, and **Notes**.
3. Within the **Base Information** subtab, complete these fields.
  - a. Enter the name for the box and its outputs.
  - b. Optionally, enter a brief description of the box.
  - c. Click **Next** to access the **Where and When** subtab.
4. Within the **Where and When** subtab, complete these fields.
  - a. In the **File Locale** check boxes, select at least one locale for this box. Options include **All User Data**, **File Shares**, **Emails**, **Desktops**, and **Collaboration Files**.

**Note:** If you select the **All User Data** check box, all file-locale options are automatically selected.
  - b. In the **Time Interval** area, enter the start and end dates for this box.
  - c. Click **Next** to access the **Who** subtab.
5. Within the **Who** subtab, complete these fields.
  - a. Select identities to act as custodians for the box. Use **Add** and **Remove** to move custodians from the **All Identities** list to the **Box Custodians** list.

**Note:** Identities are created by an administrator in the concept portion of IBM StoredIQ Administrator.

**Note:** Search for a specific identity by entering all or a portion of the user's name in the **Enter key term(s)** text box and clicking **Search**.
  - b. Select **Any Identities** or **All Identities**. This field is a Boolean AND/OR value.

**Note:** By default, **Any Identities** is selected. By changing the **Any Identities/All Identities** setting, you might obtain unexpected results.
  - c. Click **Next** to access the **Terms** subtab.
6. Within the **Terms** subtab, complete these fields.

**Note:** Entered terms are used as part of a full-text search within an info set. The data objects within the info set must be part of the full-text index to return results.

  - a. Optionally, enter litigation terms for this box. In the **Enter term and click Add** text box, enter the wanted litigation term, and then click **Add**.

**Note:** Use **Delete** and **Delete All** to remove added litigation terms.
  - b. Select **Any Term** or **All Terms**. This value is a Boolean AND/OR value.

**Note:** By default, **Any Term** is selected. By changing the **Any Term/All Terms** setting, you might obtain unexpected results.

- c. Click **Next** to access the **Notes** subtab.
7. Within the **Notes** subtab, optionally enter notes or extra instructions for the box's data expert. In the **Notes to Data Expert** text box, enter the information.  
**Note:** This text box has a limit of 2,000 characters.
8. Click **Finish**. The **Boxes and Reports** page of the matter populates with the parameters set during box creation with the box in a **Pending** state.
9. When an Identification Box is created, it is placed in a **Pending** state. The data expert receives a notification in the **My Requests** box in IBM StoredIQ Data Workbench with the details of the request. The box remains in the pending state until the data expert either completes or rejects the request.
10. When the info set is completed, the box moves from the **Pending** to **Available** state, at which point more actions become available to that box. The actions available in the **Available Actions** area that is changed from a single option, **Create Identification Box**, to multiple options. If the data expert rejects the request, the box moves to a **Declined** state.

## Editing the summary of a box

When you are editing a box, you can modify the base information or metadata that is entered during box creation.

1. Within the matter, select the box that you want to edit in the **Boxes** table.
2. In the **Summary** area, click **Edit**.
3. Modify the summary options of the box as needed.

## Data maps

The data map provides a visual layout of your data and in-depth information about data source types, data categories, size or amounts, the number of data objects, and details.

The data map contains these areas:

Data Map Option	Description
<b>Group By</b>	<p>The <b>Group By</b> area contains these options:</p> <ul style="list-style-type: none"><li>• <b>Data Source Type:</b> This view displays the different data source types that make up the selected info set. By selecting or clearing the data source types, the data map automatically reconfigures, providing you with a visual overview of your data.</li><li>• <b>None:</b> This option removes data source types from the data map.</li></ul>

Data Map Option	Description
<b>View By</b>	<p>The <b>View By</b> area contains these options:</p> <ul style="list-style-type: none"> <li>• <b>Category View:</b> View data by category, including container files and archives, images, spreadsheets, and email.</li> <li>• <b>Size View:</b> View data by size, from less than one MB to over 100 GB. The <b>Size View</b> is only active for infosets that have a top-level composition.</li> <li>• <b>Created View:</b> View data by created date from within the past 30 days to more than five years ago.</li> <li>• <b>Last Modified View:</b> View data by its last modified date, from within the past 30 days to more than five years ago.</li> <li>• <b>Last Accessed View:</b> View data by its last accessed date, from within the past 30 days to more than five years ago.</li> </ul> <p>By selecting or clearing the viewing options, the data map automatically reconfigures, providing you with a visual overview of your data.</p>
<b>Select Data Overlay</b>	<p>The <b>Select Data Overlay</b> list lets you select an overlay to be applied to your data, helping you to analyze your data differently.</p>
<b>Data Map</b>	<p>Under the Data Map, you can see the total number of objects being viewed as <b>Viewing x of x total objects</b>. This total is affected by the selection of the <b>Object Count</b> and <b>Object Size</b> tabs.</p> <ul style="list-style-type: none"> <li>• If <b>Object Count</b> is selected, this figure indicates the number of data objects that are being viewed compared to the total number of data objects.</li> <li>• If <b>Object Size</b> is selected, this figure indicates the data objects' size in bytes compared to the total byte size of the data objects.</li> </ul> <p>These same tabs, <b>Object Count</b> and <b>Object Size</b>, provide you with different viewing options within the Data Map itself.</p> <ul style="list-style-type: none"> <li>• If <b>Object Count</b> is selected, the data map displays the number of objects and their percentage of that data source when you place the pointer over a category.</li> <li>• If <b>Object Size</b> is selected, the data map displays the size and percentage of the objects for that data source when you place the pointer over a category. <b>Object Size</b> is only active for infosets that have a top-level composition.</li> </ul>
<b>Data Map Details</b>	<p>This area displays details about a tile that is selected in the data map. By clicking an individual map tile, details about that specific tile are displayed. You can also see the total number of data objects referred to by the map tile.</p> <p><b>Note:</b> Selected tiles have a green border. Tiles over which the pointer was placed have a black border.</p> <p>The <b>Data Map Details</b> also shows you the <b>Total Size</b> of the selected tile. The bar graph automatically populates, providing a visual representation of how the size of the selected tile relates to that of the size of the infoset as a whole.</p> <p>By clicking <b>View Full List</b>, the Data Map Details dialog appears. From here, you can download information about the selected tile to a CSV file.</p>

## Viewing the file list or data map

The file list and data map helps you to explore your data, its details, and relationships.

**Note:** Switch between the file list and the data map by clicking the **List** or **Map** tabs. A selected, active tab is blue.

To view a box's file list or data map:

1. Within the matter's box, click **File List** in the **Summary** area.

**Note:** The **File List** link is disabled when the box is in a pending state.

The **Settings** area depicts selections that are entered during box creation. The five subtabs, that is, **Where, When, Who: Any Identities, Terms: Any Terms**, and **Notes**, all appear as headings within the **Settings** area.

The **File List** area shows information about the box's data objects, including the **File name, File size, File path, Created** date and time, and the **Last Modified** date and time. To view a particular object, click the object's name and it opens in the **Data Object Viewer** page.

- a. In a box's **File List**, click the name of the data object you would like to view. The data object appears in the Data Object Viewer.
  - b. Move from one object to the next or within the object itself using the navigation options at the top of the viewer.
  - c. Close the Data Object Viewer by clicking **Close**.
2. Alternately, within the matter's box, click **Data Map** in the **Summary** area.

**Note:** The **Data Map** link is disabled when the box is in a pending state.

The data map is identical to the data map in IBM StoredIQ Data Workbench. Within the data map, you can explore your data to better understand it and its details.

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## Actions on a box

When an Identification Box is created, multiple actions are available to help you categorize and move data objects as part of the e-discovery process.

These box actions are available in the **Available Actions** area:

- Refine this box
- Restart this box
- Create a new box based on this box
- Create a Collection Box based on this box
- Create an Export Box based on this box
- Clone this box
- Run a report on this box
- Delete this box

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## Refining a box

After a box is created, it can be refined by changing the scope of the box. This revision modifies the box's parameters.

1. Select the box that you want to refine, and then click the **Refine this box** link in the Available Actions area.  
The Refine Box dialog box appears. There are four subtabs in the Refine Box dialog box: **Where and When**, **Who**, **Terms**, and **Notes**.
2. Within the **Where and When** subtab, complete these fields.
  - a) In the **File locale** check boxes, select at least one locale for this box. Options include **File Shares**, **Emails**, **Desktops**, and **Collaboration**.
  - b) In the **Time interval** area, use the list and enter the start and end dates for which this box must be revised.
  - c) Click **Next** to access the **Who** subtab.
3. Within the **Who** subtab, complete the following fields.  
By default, the fields are populated with current custodian selections.
  - a) Select identities to act as custodians for the box. Use **Add** and **Remove** to move custodians from the **All Identities** list to the **Current Box Custodians** list.  
**Note:** Search for a specific identity by entering all or a portion of the user's name in the **Enter terms...** text box and clicking **Search**.
  - b) Select **All Identities** or **All Identities**. The value is a Boolean AND/OR value.  
**Note:** If you change the **All Identities/All Identities** setting, you might obtain unexpected results.
  - c) Click **Next** to access the **Terms** subtab.
4. Within the **Terms** subtab, complete the following fields.  
By default, the fields are populated with current matter-term selections.
  - a) In the **Enter term and click Add** text box, enter the wanted litigation term, and then click **Add**.
  - b) Select either **Any Term** or **All Term**. This value is a Boolean AND/OR value.  
**Note:** If you change the **Any Term/All Terms** setting, you might obtain unexpected results.
  - c) Use **Delete** and **Delete All** to remove added litigation terms.
  - d) Click **Next** to access the **Notes** subtab.



5. Within the **Notes** subtab, complete these fields.
  - a) In the **Notes to Data Expert** text box, enter instructional information for the box's data expert.  
**Note:** This text box has a limit of 2,000 characters.
6. Click **Finish**.  
The box is now in a **Pending** state on the **Matter Overview** page.

## Restarting a box

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If a box undergoes several revisions, it is necessary to restart the box.

1. Select the box that you want to restart, and then click the **Restart this box** link in the **Available Actions** area.  
The Restart Box dialog box appears. There are four subtabs in the Restart Box dialog box: **Where and When**, **Who**, **Terms**, and **Notes**.
2. Within the **Where and When** subtab, complete the following fields.  
By default, the dates that are entered during box creation populate this box.
  - a) In the **File locale** check boxes, select at least one locale for this box. Options include **All User Data**, **File Shares**, **Emails**, **Desktops**, and **Collaboration**.
  - b) In the **Time interval** area, use the list and start and end dates for when this box must be restarted.
  - c) Click **Next** to access the **Who** subtab.
3. Within the **Who** subtab, complete the following fields.  
By default, the fields are populated with current custodian selections.
  - a) Select identities to act as custodians for the box. Use **Add** and **Remove** to move custodians from the **All Identities** list to the **Box Custodians** list.  
**Note:** Search for a specific identity by entering all or a portion of the user's name in the **Enter terms...** text box and clicking **Search**.
  - b) Select **All Identities** or **All Identities**. This value is a Boolean AND/OR value.  
**Note:** If you change the **All Identities/All Identities** setting, you might obtain unexpected results.
  - c) Click **Next** to access the **Terms** subtab.
4. Within the **Terms** subtab, complete the following fields.  
By default, the fields are populated with current matter-term selections.
  - a) In the **Enter term and click Add** text box, enter the wanted litigation term, and then click **Add**.
  - b) Select either **Any Term** or **All Term**. This value is a Boolean AND/OR value.  
**Note:** If you change the **Any Term/All Terms** setting, you might obtain unexpected results.
  - c) Use **Delete** and **Delete All** to remove added litigation terms.
  - d) Click **Next** to access the **Notes** subtab.
5. Within the **Notes** subtab in the **Notes to Data Expert** text box, enter information for the box's data expert.  
**Note:** This text box has a limit of 2,000 characters.
6. Click **Finish**.  
The box is now in a **Pending** state on the **Matter Overview** page.

## Cloning a box

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Created boxes can be cloned to create other, identical boxes.

**Note:** When you are cloning a box, the settings and values of the original's box are used to prepopulate the values of the cloned box.

1. Select the box that you want to clone, and then click the **Clone this box** link in the Available Actions area.  
The Clone Identification Box dialog box appears. There are five subtabs in the Clone Identification Box dialog box: **Base Information**, **Where and When**, **Who**, **Terms**, and **Notes**.
2. Within the **Base Information** subtab, complete these fields.
  - a) In the **Base Name** text box, enter the name to be used for the box and its outputs.
  - b) In the **Description** text box, enter a brief description of the box.
  - c) Click **Next** to access the **Where and When** subtab.
3. Within the **Where and When** subtab, complete these fields:
  - a) In the **File locale** check boxes, select at least one locale for this box. Options include **All User Data**, **File Shares**, **Emails**, **Desktops**, and **Collaboration**.
  - b) In the **Time interval** area, use the list and enter the start and end dates for which this box must be revised.
  - c) Click **Next** to access the **Who** subtab.
4. Within the **Who** subtab, complete these fields.

By default, the fields are populated with current custodian selections.

  - a) Select identities to act as custodians for the box. Use **Add** and **Remove** to move custodians from the **All Identities** list to the **Current Box Custodians** list.  
**Note:** Search for a specific identity by entering all or a portion of the user's name in the **Enter terms...** text box and clicking **Search**.
  - b) Select **All Identities** or **All Identities**. This value is a Boolean AND/OR value.  
**Note:** If you change the **All Identities/All Identities** setting, you might obtain unexpected results.
  - c) Click **Next** to access the **Terms** subtab.
5. Within the **Terms** subtab, complete the following fields.

By default, the fields are populated with current matter-term selections.

  - a) In the **Enter term and click Add** text box, enter the wanted litigation term, and then click **Add**.
  - b) Select either **Any Term** or **All Term**. This value is a Boolean AND/OR value.  
**Note:** If you change the **Any Term/All Terms** setting, you might obtain unexpected results.
  - c) Use **Delete** and **Delete All** to remove added litigation terms.
  - d) Click **Next** to access the **Notes** subtab.
6. Within the **Notes** subtab, complete these fields.
  - a) In the **Notes to Data Expert** text box, enter information for the box's data expert.  
**Note:** This text box has a limit of 2,000 characters.
7. Click **Finish**.

The box is now in a **Pending** state on the **Boxes and Reports** page.

## Creating a collection box

---

Collection boxes can be created with another box's original settings.

**Note:** When you are creating a box that is based on another box, the settings and values of the original box are used to prepopulate the collection box's values.

1. Select the box from which you want to create a collection box, and then click the **Create a Collection Box based on this box** link in the **Available Actions** area.  
The **Create Collection Box** dialog box appears. Two subtabs in the **Create Collection Box** dialog box are **Base Information** and **Notes**.
2. Within the **Base Information** subtab, complete these fields.

- a) Enter the name for the box and its outputs.
- b) Enter a brief description of the box.
- c) Click **Next** to access the **Notes** subtab.
3. Within the **Notes** subtab, complete these fields.
  - a) In the **Notes to Data Expert** text box, enter information for the box's data expert.
 

**Note:** This text box has a limit of 2,000 characters.
4. Click **Finish**.  
The box is now in a **Pending** state on the **Matter Overview** page.
5. The data expert receives a notification in the **My Requests** box in IBM StoredIQ Data Workbench with the details of the request. The box remains in the pending state until the data expert either completes or rejects the request.

## Creating an export box

---

Export boxes can be created with another box's original settings.

1. Select the box from which you want to create an export box, and then click the **Create an Export Box based on this box** link in the **Available Actions** area.  
The Create Export Box dialog box appears. Two subtabs in the Create Export Box dialog box are **Base Information** and **Notes**.
2. Within the **Base Information** subtab, complete these fields.
  - a) Enter the name to be used for the box and its outputs.
  - b) Enter a brief description of the box.
  - c) Click **Next** to access the **Notes** subtab.
3. Within the **Notes** subtab in the **Notes to Data Expert** text box, enter information for the box's data expert.
 

**Note:** This text box has a limit of 2,000 characters.
4. Click **Finish**.  
The box is now in a **Pending** state on the **Matter Overview** page.
5. The data expert receives a notification in the **My Requests** box in IBM StoredIQ Data Workbench with the details of the request. The box remains in the pending state until the data expert either completes or rejects the request.

## Reports

---

IBM StoredIQ eDiscovery provides a set of preconfigured system reports that you can run on a box.

You can select from these report types:

### Compliance Report

Inspects data for compliance with established guidelines, specifications, or governance policies. The generated report provides detailed information about data-object compliance.

### CSV All Audited Objects Export

Lists all audited data objects after the policy is run. For each data object, the report contains information about its location, type, owner, and size, and the date and time when it was created, last modified or accessed.

### CSV Attribute Summary

Lists a summary of attribute counts for in infoset.

### CSV Term Hit Details Export

Lists details about term hits for indexed annotations or other terms. With this report, you can identify which data objects contain how many instances of those terms and where in the object the terms are located.

For meaningful results, run this report on full-text indexed infosets, preferably infosets on which at least one Step-up Analytics action with one or more cartridges was run.

Before you run this report on an infoset that you created in a product release before version 7.6.0.15, rerun any Step-up Analytics actions to ensure that the information required for proper report results is added to the index.

#### **CSV Exception List Export**

Lists the exceptions that are encountered during the execution of an action.

#### **CSV Infoset Data Object Export**

Lists the data objects within an infoset. For each data object, the report contains information about its location, type, owner, and size, and the date and time when it was created, last modified or accessed.

#### **Data Assessment Report**

Assesses data for IT policies based on distribution.

#### **Data Privacy Report Card**

Shows the distribution of sensitive information in an infoset. The search terms and their assignment to security levels is defined in the report configuration. Contact your IBM StoredIQ administrator for information about the report configuration in your system.

Depending on the report configuration, the infoset on which you want to run this report must at least be full-text indexed for the report to return meaningful results. If the configuration includes indexed cartridge terms, you must have run those Step-up Analytics actions that generate the respective annotations to receive meaningful results.

#### **Data Topology Report**

Describes how data is distributed across your organization.

**Note:** Only the top 100 owners of infoset objects across volumes can appear in the data topology report.

#### **Duplication Summary Report**

Lists the duplicate data objects that are contained within an infoset.

#### **Overlay Hit Report**

Compares data's responsiveness for various overlays.

## **Running a report on a box**

---

Follow this procedure to run various types of reports.

1. Select the box on which you want to run a report, and then click the **Run a report on this box** link in the **Available Actions** area.  
The **Run a Report Box** dialog box appears. There are two subtabs in the **Run a Report Box** dialog box, **Select Report** and **Report Options**.
2. Within the **Select Report** subtab, select the report that you want to run.  
When a report is selected in the **Select Report** subtab, details for that report appear within the dialog box, including the report's name and description.
  - a) Search for a specific report by entering all or a portion of the report's name in the **Enter terms...** text box and clicking **Search**.
  - b) Click **Next** to access the **Report Options** subtab.
3. Within the **Report Options** subtab, complete these fields.
  - a) In the **Report Name** text box, verify that you are running the wanted report. If not, this field can be edited, so you can enter the name of the report you want to run.
  - b) To have an email that is sent after the report is complete, select the **Send an email when the process is complete** check box. Then, enter the email addresses of the individuals to whom this report is sent in the **Enter notification emails** text box.

**Note:** If you enter multiple email addresses, they must be separate with a comma.

4. Click **Run** to run the report.

The box reverts to the **Pending** state when the report is running. When the report is complete, click the report's name under **Reports**, the report can be viewed from the user interface.

## Deleting a box

---

Boxes that are no longer needed within a matter can be deleted.

1. Select the box that you want to delete, and then click the **Delete this box** link in the **Available Actions** area.

The **Delete Box Confirmation** window appears.

2. Click **OK** to delete the box.

The box is deleted and removed from the matter. It is no longer seen within the **Matter Overview** page.

**Note:** Deleting a box does not affect any boxes that are created with it or cloned from it. However, its deletion means that it is no longer available to create new boxes or reports.

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