

# Part 5g – Processing

## (Premium eDiscovery)

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Before we start, please note that if you want to see a table of contents for all the sections of this blog and their various Purview topics, you can locate the in the following link:

[Microsoft Purview- Paint By Numbers Series \(Part 0\) - Overview - Microsoft Tech Community](#)

### Disclaimer

This document is not meant to replace any official documentation, including those found at docs.microsoft.com. Those documents are continually updated and maintained by Microsoft Corporation. If there is a discrepancy between this document and what you find in the Compliance User Interface (UI) or inside of a reference in docs.microsoft.com, you should always defer to that official documentation and contact your Microsoft Account team as needed. Links to the docs.microsoft.com data will be referenced both in the document steps as well as in the appendix.

All of the following steps should be done with test data, and where possible, testing should be performed in a test environment. Testing should never be performed against production data.

## Target Audience

The Advanced eDiscovery (Aed) section of this blog series is aimed at legal and HR officers who need to understand how to perform a basic investigation.

## Document Scope

This document is meant to guide an administrator who is “net new” to Microsoft E5 Compliance through the use of Advanced eDiscovery.

It is presumed that you already data to search inside your tenant.

We will only step through a basic eDiscovery case (see the Use Case section).

## Out-of-Scope

This document does not cover any other aspect of Microsoft E5 Purview, including:

- Data Classification
- Information Protection
- Data Protection Loss (DLP) for Exchange, OneDrive, Devices
- Data Lifecycle Management (retention and disposal)
- Records Management (retention and disposal)
- Premium eDiscovery
  - Overview and Settings
  - Case Creation and Case Settings
  - Data Sources and Collections
  - Review Sets
  - Communications
  - Holds
  - Exports
  - Jobs
- Insider Risk Management (IRM)
- Priva
- Advanced Audit
- Microsoft Cloud App Security (MCAS)
- Information Barriers
- Communications Compliance
- Licensing

It is presumed that you have a pre-existing understanding of what Microsoft E5 Compliance does and how to navigate the User Interface (UI).

For details on licensing (i.e. which components and functions of Purview are in E3 vs E5) you will need to contact your Microsoft Security Specialist, Account Manager, or certified partner.

## Use Case

There are many use cases for Advanced eDiscovery. For the sake of simplicity, we will use the following: Your organization has a Human Resources investigation against a specific user.

## Overview of Document

This part of the blog is looking at the Processing tab, and how it should be used in an eDiscovery case. As this tab is primarily used in troubleshooting, we will not spend much time in this tab as part of this blog series.

## Definitions

- Data Sources – These are the locations (EXO, SPO, OneDrive) where searches will be performed. These are all the custodians (users) being investigated. This is not the users performing the investigation.
- Collections – This is the actual search being performed. Collections include user, keyword, data, etc.
- Review Sets – Once a collection/search has been performed, the data must be reviewed. This tab is where secondary searches can be done and a review of the data.
- Communications – If the HR or legal team wishes, they can notify the user that they are under investigation. You can also set up reminder notifications in this section of the UI.
  - Note - This task is optional.
- Hold – Once the data has been collected/searched or reviewed, either all or part of the data can be placed on legal hold. This means that the data cannot be deleted by the end user and if they do, then only their reference to the data is deleted. If the user deletes their reference, then the data is placed into a hidden hold directory.
- Processing – This tab is related to the indexing of data in your production environment. You would use this if you are not finding data that you expect and you need to re-run indexing activities.
  - Note - This task is optional.
- Exports #1 – When referring to the tab, this provides the data from the case to be exported to a laptop or desktop.
- Export #2 – This is also the term used to export a .CSV report.
- Jobs – This provides a list of every job run in eDiscovery and is useful when trying to see the current status of your jobs (example – Collection, Review, Processing, Export, etc). This is useful if you launch an activity and want to monitor its status in real-time.
- Setting – High level analytics and settings and reports, etc.
- Custodian – This is the individual being investigated.

## Notes

- Core vs Advanced eDiscovery (high level overview)
  - Core eDiscovery – This allows for searching and export of data only. It is perfect for basic “search and export” needs of data. It is not the best tool for data migration or HR and/or Legal case management and workflows.
  - Advanced eDiscovery – This tool is best used as a first and second pass tool to cull the data before handing that same data to outside council or legal entity. This tool provides a truer work flow for discovery, review, and export of data along with reporting and redacting of data.
- If you are not familiar with the Electronic Discovery Reference Model (EDRM), I recommend you learn more about it as it is a universal workflow for eDiscoveries in the United States. The link is in the appendix.
- For my test, I am using a file named “1-MB-Test-SSN-1-AeD” with the phrase “Friedrich Conrad Rontgen invented the X-Ray” inside it. This file name stands for 1MB file with SSN information for Advanced eDiscovery testing.
- We will not be using all of the tabs in available in a AeD case.
- How do user deletes of data work with AeD?
  - If the end user deletes the data on their end and there IS NO Hold, then the data will be placed into the recycle bin on the corresponding applications.
  - If the end user deletes the data on their end and there IS a Hold, then the data will NOT be placed into the recycle bin on the corresponding applications. However, the user reference to the data will be deleted so they will believe that the data is deleted.
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## Pre-requisites

You should review the previous parts of this eDiscovery blog series and be sure you have done them.

## What is Processing in Premium eDiscovery,.

Let us start with what Processing when it comes to Premium eDiscovery is. It is the process of indexing data that either has NOT been indexed OR had an error when being indexed previously. Here is the official explanation from docs.microsoft.com:

“Processing is the process of file identification, expansion of embedded documents and attachments, text extraction, and Optical Character Recognition (OCR) of image files and the subsequent indexing of that content.

When you add custodians and non-custodian data sources to a case on the Sources tab, all partially indexed items from Microsoft 365 are processed to make them fully searchable. Likewise, when content is added to a review set from both Microsoft 365 and non-Microsoft 365 data sources, this content is also processed.

The Processing tab in eDiscovery (Premium) provides insight into the status of advanced indexing for different processing scenarios.”

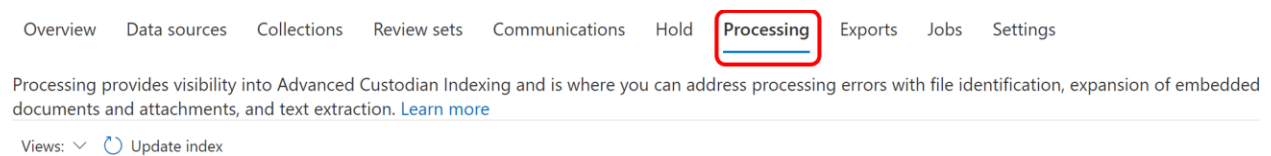
Here is the official link (it is also in the **Appendix and Links** section below:

[Work with processing errors in eDiscovery \(Premium\) - Microsoft Purview \(compliance\) | Microsoft Learn](#)

**Note** – I would not expect you to spend much if any of your time in this part of your Case unless you are troubleshooting indexing issues with tech support or are trying to index newly imported data (ex. PST files).

## Processing tab


If you wish to look at the Processing tab, you can find the tab on the right-hand panel of your eDiscovery case tab.



In the bottom of the pane, you will, under the Views drop down you can look at your:

- Index Status
- Errors
- Remediations

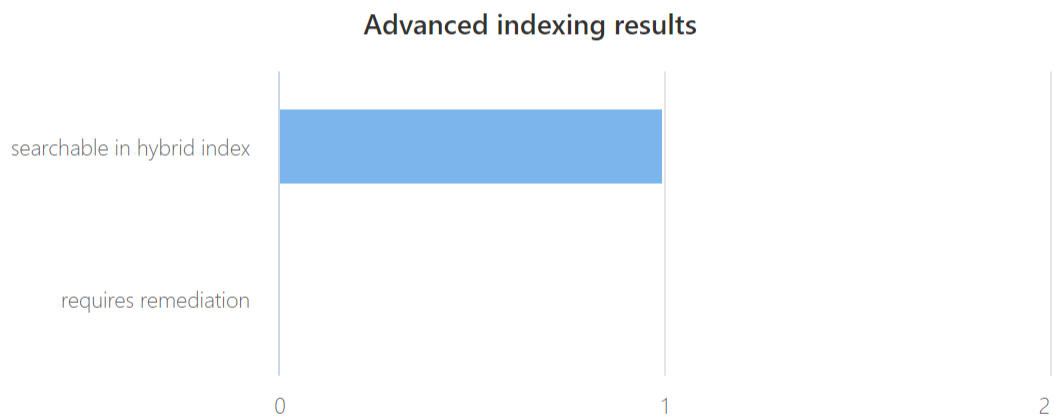
For definitions of these, please see the links in the **Appendix and Links** section below.

Views: ▾  Update index

- ✓ Index status
- Errors
- Remediations

Here is an example view from the **Index Status** view.

Views: ▾  Update index



Note: Custodian indexes are automatically updated before returning search results.

Since we are not troubleshooting indexing issues in the blog OR re-0running indexing for things such as OCR, we are now done with this part of the blog series and you can move to Part H.

## Appendix and Links

- [Work with processing errors in Advanced eDiscovery - Microsoft 365 Compliance | Microsoft Docs](#)
- [Work with processing errors in eDiscovery \(Premium\) - Microsoft Purview \(compliance\) | Microsoft Learn](#)
- [Advanced indexing of custodian data - Microsoft Purview \(compliance\) | Microsoft Learn](#)
- [Supported file types in eDiscovery \(Premium\) - Microsoft Purview \(compliance\) | Microsoft Learn](#)
- [Partially indexed items in Content Search - Microsoft Purview \(compliance\) | Microsoft Learn](#)
- [File formats indexed by Exchange Search: Exchange 2013 Help | Microsoft Learn](#)
- [Default crawled file name extensions and parsed file types in SharePoint Server - SharePoint Server | Microsoft Learn](#)
- [Error remediation when processing data - Microsoft Purview \(compliance\) | Microsoft Learn](#)
- [Single item error remediation - Microsoft Purview \(compliance\) | Microsoft Learn](#)