

Jatheon cCore v3 Compliance Officer Manual

Thank you for choosing Jatheon Technologies. This guide describes the most common tasks you can perform on your cCore archiving appliance.

*Please note that the system presented in this manual may differ from yours depending on the version of the software you're currently using.

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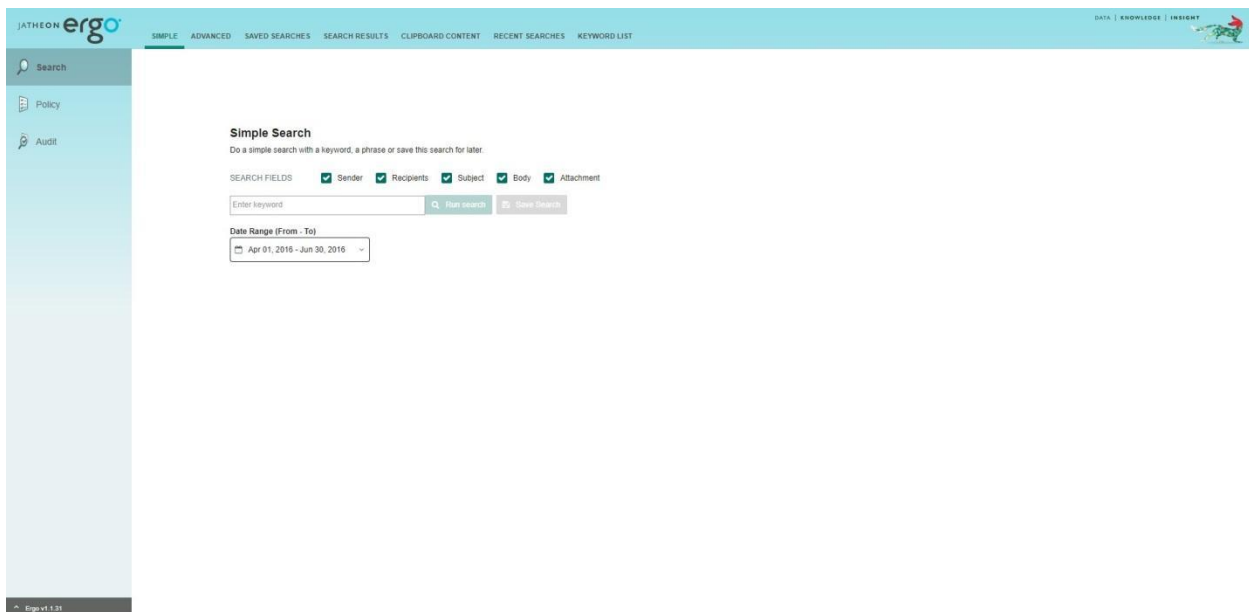
1. Simple Search

Introduction

You can use Simple Search to search through and locate your archived emails. If you really know specific data you're looking for, you'll be able to find it among millions of other emails, in a matter of seconds. You should use Simple Search rather than Advanced Search when you know what specific email/messages you're looking for. There are a few important filter fields to choose from: Sender, Recipients, Subject, Body, Attachment.

Simple Search Location

After logging in, Simple Search is the first page/tab that you'll see.

The screenshot shows the JATHEON ergo web application interface. At the top, there's a navigation bar with the JATHEON ergo logo on the left and a small user profile icon on the right. Below the navigation bar, there's a sidebar on the left with links for Search, Policy, and Audit. The main content area is titled "Simple Search" and contains a form for searching. The form includes a "SEARCH FIELDS" section with checkboxes for Sender, Recipients, Subject, Body, and Attachment, all of which are checked. Below this is a text input field labeled "Enter keyword" with a search button and a "Save Search" button. There's also a "Date Range (From - To)" section with a calendar icon and a date range of "Apr 01, 2016 - Jun 30, 2016". The bottom of the page shows a version number "Ergo v1.1.31".

Options, Search Fields and Conditions

If you select multiple check boxes (e.g. Body and Subject) and enter the desired keyword, search will display any email/messages that contain the keyword at least in one place, in the body or in the subject (or in both). Note that the condition is never that the keyword must be in both places. Clicking the search button will of course run search. To open the search result page/tab, you can press Enter on your keyboard as well. The calendar is here for filtering a specific time range. The Save Search option will give you the possibility to run that same search again from the saved search section. At least one check box/field is mandatory.

Sender

If you select this check box, search will only look into the **From** section of email. You can use first names, last names, domains or any combinations of keywords here.

Recipients

If you select this check box, search will look into the **To, Cc, Bcc, Hidden** section of email, i.e. every kind of recipients. You can use first names, last names, domains or any combinations of keywords here.

Subject

If you select this check box, search will only look into the **Subject** section of email. You can use letters, numbers or special character here.

Body

If you select this check box, search will only look into the **Body** section of email. You can use letters, numbers or special character here.

Attachment

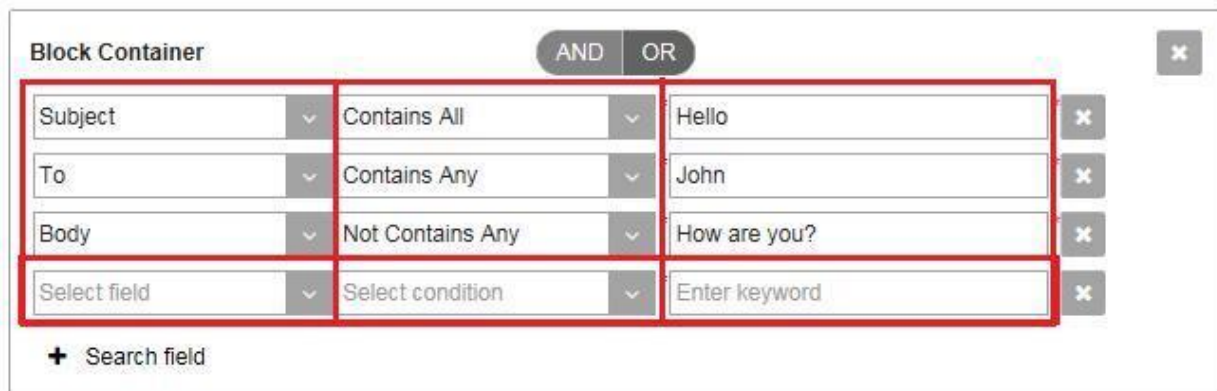
If you select this check box, search will look into email attachment/s, and search for two criteria: attachment file name, and content/data inside of the attachment.

2. Advanced Search

Introduction

You can use Advanced Search to find any emails that are archived. If you know two or more bits of information about a specific email you're looking for, you can find it among millions of other emails, in a matter of seconds. There are a lot of fields with lots of different conditions to choose from.

Some fields, if they are similar, will share same conditions, whereas others will have completely unique conditions. The following picture explains what constitutes a field, a field condition and a keyword.

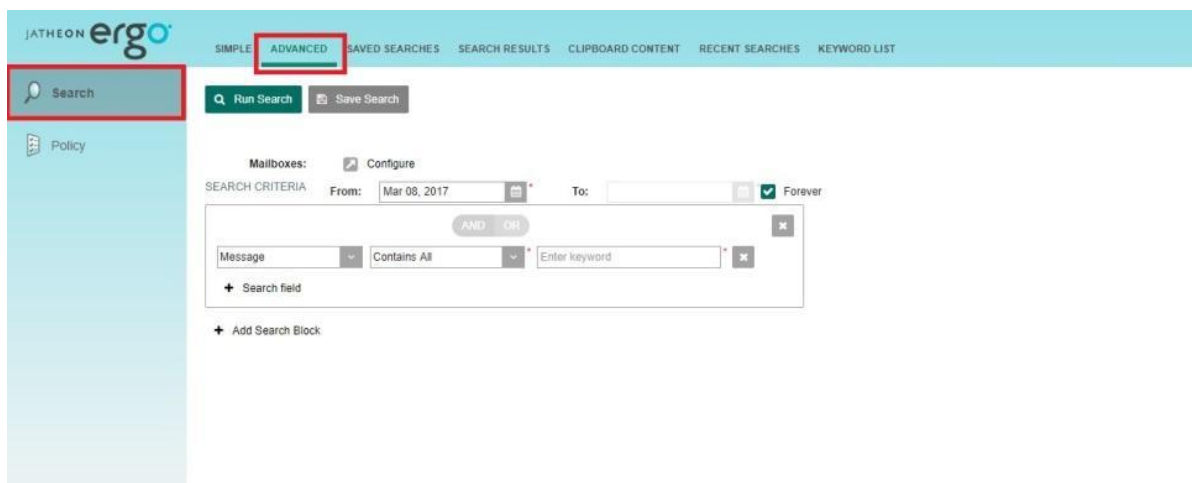


Block Container			AND	OR	
Subject	Contains All	Hello			X
To	Contains Any	John			X
Body	Not Contains Any	How are you?			X
Select field	Select condition	Enter keyword			X

+ Search field

Advanced Search Location

After logging in, you will see the Simple Search section of the system (default view after login). Click on the Advanced Search tab.



JATHEON ergo

SIMPLE **ADVANCED** SAVED SEARCHES SEARCH RESULTS CLIPBOARD CONTENT RECENT SEARCHES KEYWORD LIST

Search

Run Search Save Search

Mailboxes: Configure

SEARCH CRITERIA From: Mar 08, 2017 To: Forever

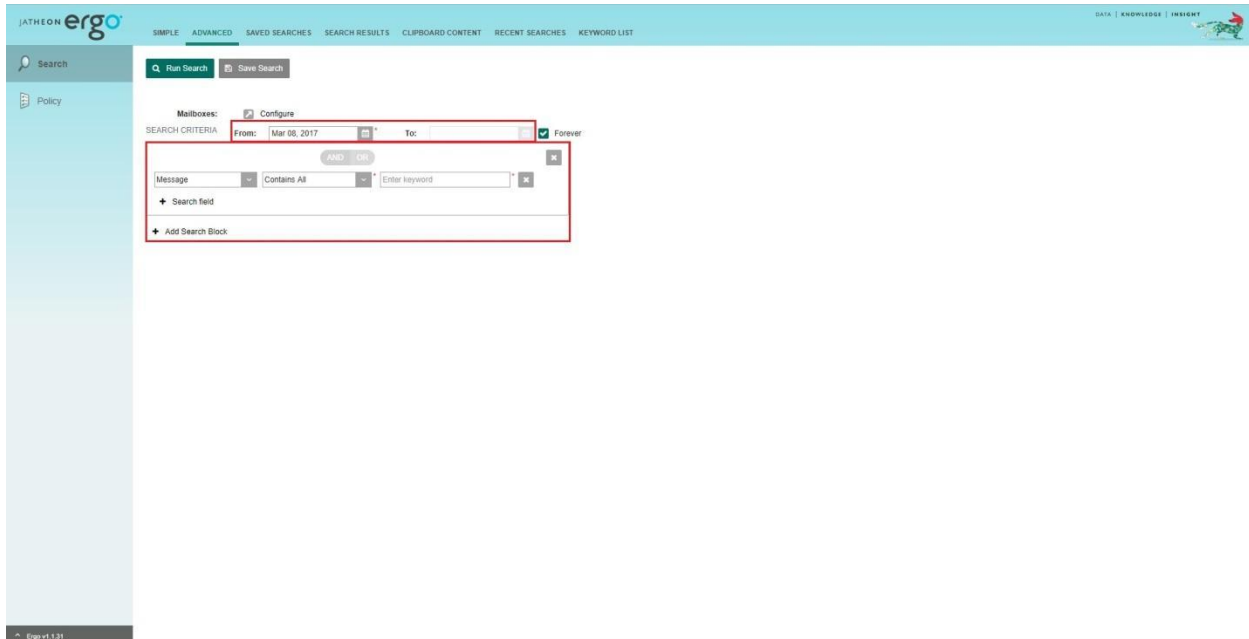
Message Contains All Enter keyword

+ Search field

+ Add Search Block

After you've clicked on the Advanced Search tab, you'll see the Advanced Search page with all its options:

- Run Search
- Save Search
- From
- To
- AND/OR buttons
- + Search Field
- + Add Search Block
- Cancel X icon
- Search Block Container



Using Advanced Search (Basics)

- **From/To**
Allows you to filter the time period.
- **Block Container**
By default, only one block container will be displayed with Message as pre-selected field and Contains All as the default condition. You can add more block containers by clicking on **+Add Search Block**. Alternatively, you can add more search filters/fields to an existing block container by clicking on **+Search Field**.

- **Keyword**

The third section in the block container is always the keyword field. Note that some fields are text boxes while some are drop-down menus with predefined values.

- **Save Search**

This option is very useful once you have set up your search the way you want it and if you plan to use that same search in the future again. To avoid doing it all over again every time, just click on the Save Search button. A small pop-up will appear asking you to name your saved search. Click Save. Please note that the system does not allow saved searches with the same names.

- **Run Search**

When you have set up your search the way you want it, just click on this button and it will open the Search Results page/tab with emails/messages displayed in a list.

- **X icon next to a keyword**

This icon will remove the field, condition and keyword entirely with all its data.

- **X icon next to a block container**

This icon will remove the entire block container with all its data.

- **AND/OR buttons**

They will be grayed out by default, but once you add one more field to search within the same block container, they will become available for use.

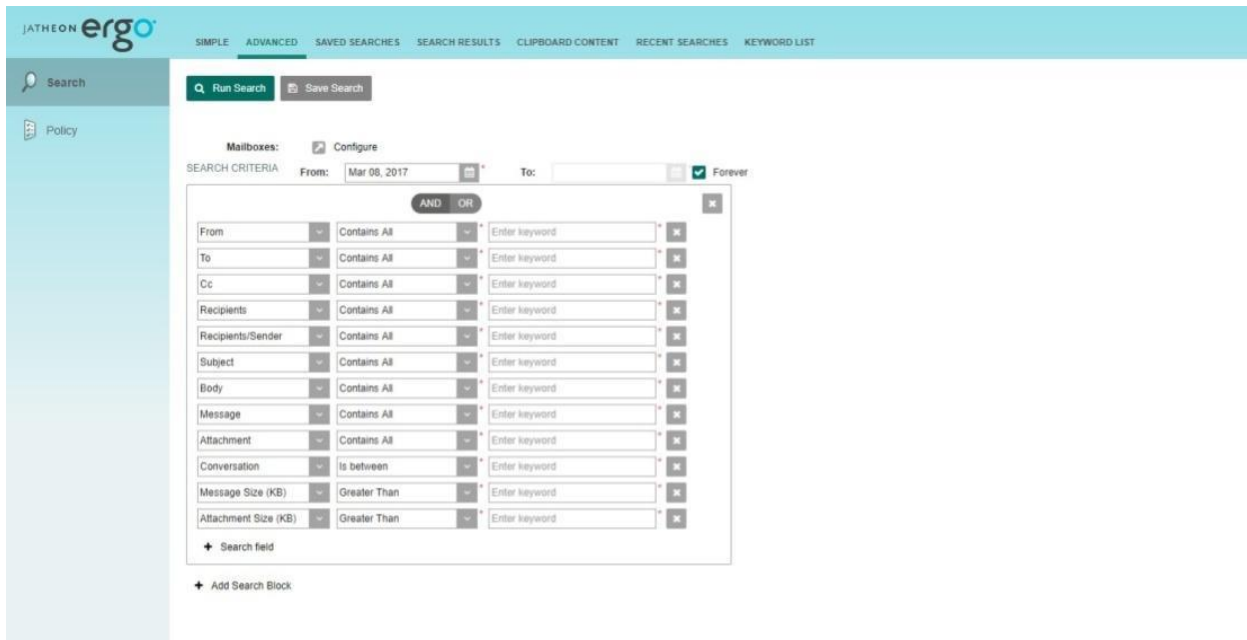
AND means that search will display only emails that contain all of the specified requirements together, within a search block. Any emails/messages that lack one or more fields/conditions will not be displayed. For example, if you search: From >**John**, To >**Nikola**, Body >**Text**, you'll only see emails/messages that have John as sender, Nikola as receiver, with text in the email body.

OR means that search will display any emails containing at least one of the criteria specified in the block container. Even if the email contains all three fields, on the search results page you'll see ANY emails that meet at least one of the search criteria: John as the sender, or Nikola as the receiver, or Text in body of email.

Search Fields

This is the list of all search fields. Under this list you'll find detailed explanation of every field itself with its first default condition. Some fields can search for only one section of an email/message, while other fields may search for more.

- From
- To
- Cc
- Bcc
- Hidden
- Recipients
- Recipients/Sender
- Subject
- Body
- Message
- Attachment
- Conversation
- Message Size (KB)
- Attachment Size (KB)

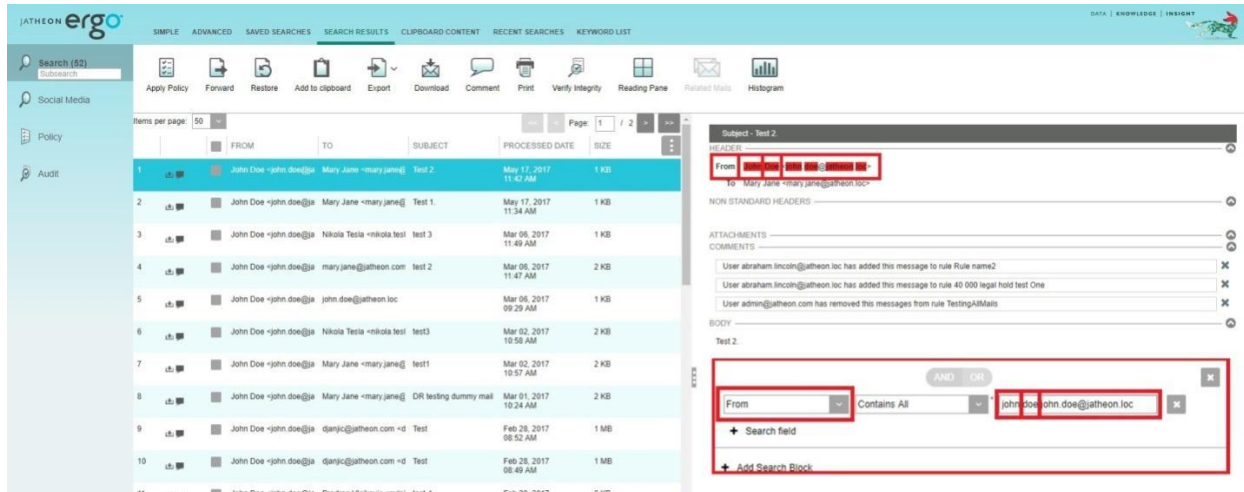


The screenshot shows the JATHEON ergo search interface. The top navigation bar includes links for SIMPLE, ADVANCED, SAVED SEARCHES, SEARCH RESULTS, CLIPBOARD CONTENT, RECENT SEARCHES, and KEYWORD LIST. The left sidebar has a 'Search' icon and a 'Policy' link. The main search area has a 'Run Search' button and a 'Save Search' button. Below these, there are 'Mailboxes:' and 'Configure' options. The 'SEARCH CRITERIA' section shows a 'From' field set to 'Mar 08, 2017' and a 'To' field set to 'Forever'. The search criteria are organized into a table with columns for the field name, the condition, and the keyword. The fields listed are From, To, Cc, Recipients, Recipients/Sender, Subject, Body, Message, Attachment, Conversation, Message Size (KB), and Attachment Size (KB). The conditions for most fields are 'Contains All', while for Conversation it is 'is between', and for Message Size (KB) and Attachment Size (KB) it is 'Greater Than'. Each row has an 'Enter keyword' input field and a plus icon to add more criteria. At the bottom, there are buttons for '+ Search field' and '+ Add Search Block'.

Field	Condition	Keyword
From	Contains All	Enter keyword
To	Contains All	Enter keyword
Cc	Contains All	Enter keyword
Recipients	Contains All	Enter keyword
Recipients/Sender	Contains All	Enter keyword
Subject	Contains All	Enter keyword
Body	Contains All	Enter keyword
Message	Contains All	Enter keyword
Attachment	Contains All	Enter keyword
Conversation	is between	Enter keyword
Message Size (KB)	Greater Than	Enter keyword
Attachment Size (KB)	Greater Than	Enter keyword

From

This field will search for the **Sender** of email/messages and nowhere else. It can be a single word, first name or last name, an entire email address or domain or different combinations. Here you can see what was used as the keyword for **From** field, and what will be displayed and highlighted on the search results page/tab.

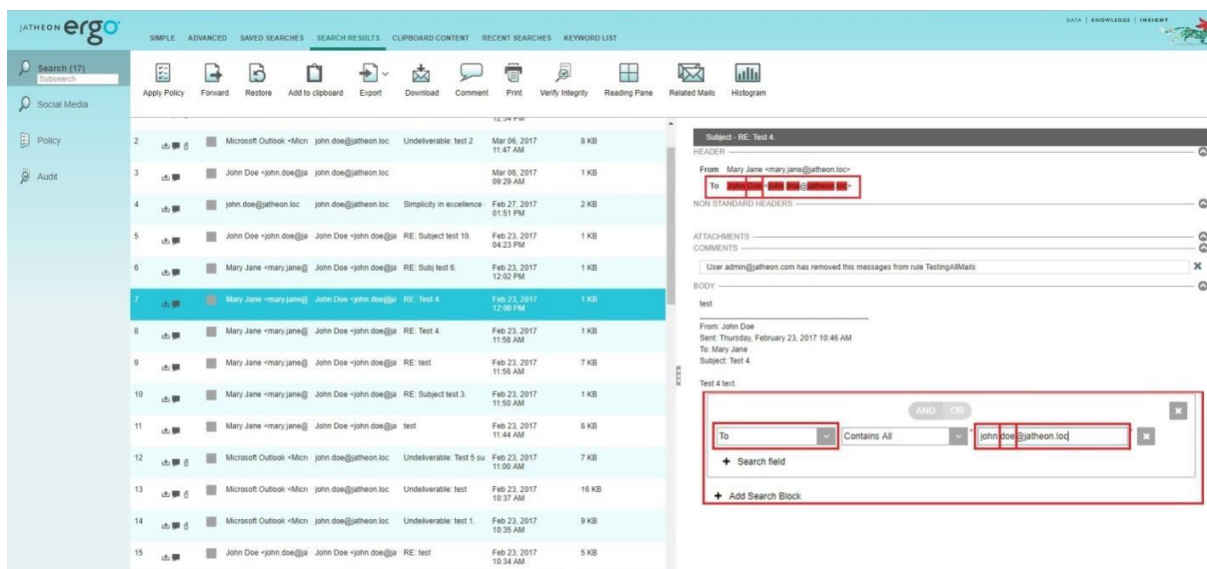


The screenshot shows the JATHEON ergo search results page. The search criteria are set to 'From'. The results table lists 11 items. The right-hand pane shows the details for 'Test 2', including the header 'From: John Doe <john.doe@jatheon.com>', non-standard headers, attachments, comments, and the body text 'Test 2:'. A search filter is visible at the bottom right, showing 'From' and 'Contains All' with the search term 'john.doe@jatheon.com'.

	FROM	TO	SUBJECT	PROCESSED DATE	SIZE
1	John Doe <john.doe@jatheon.com>	Mary Jane <mary.jane@jatheon.com>	Test 2	May 17, 2017 11:42 AM	1 KB
2	John Doe <john.doe@jatheon.com>	Mary Jane <mary.jane@jatheon.com>	Test 1	May 17, 2017 11:34 AM	1 KB
3	John Doe <john.doe@jatheon.com>	Nikola Tesla <nikola.test@jatheon.com>	test 3	Mar 06, 2017 11:49 AM	1 KB
4	John Doe <john.doe@jatheon.com>	mary.jane@jatheon.com	test 2	Mar 06, 2017 11:47 AM	2 KB
5	John Doe <john.doe@jatheon.com>	john.doe@jatheon.com		Mar 06, 2017 09:29 AM	1 KB
6	John Doe <john.doe@jatheon.com>	Nikola Tesla <nikola.test@jatheon.com>	test3	Mar 02, 2017 10:56 AM	2 KB
7	John Doe <john.doe@jatheon.com>	Mary Jane <mary.jane@jatheon.com>	test1	Mar 02, 2017 10:57 AM	2 KB
8	John Doe <john.doe@jatheon.com>	Mary Jane <mary.jane@jatheon.com>	DR testing dummy mail	Mar 01, 2017 10:24 AM	2 KB
9	John Doe <john.doe@jatheon.com>	djanjic@jatheon.com	Test	Feb 28, 2017 08:52 AM	1 MB
10	John Doe <john.doe@jatheon.com>	djanjic@jatheon.com	Test	Feb 28, 2017 08:49 AM	1 MB
11	John Doe <john.doe@jatheon.com>	Predrag Vlahovic <pvlah@jatheon.com>	test 4	Feb 28, 2017	6 KB

To

This field will search only in **Recipient(s)** of emails/messages in **To** section and nowhere else. It can be a single word, first name or last name, an entire email address or domain, or different combinations. Here you can see what was used as the keyword for To field, and what will be displayed and highlighted on the search results page/tab.

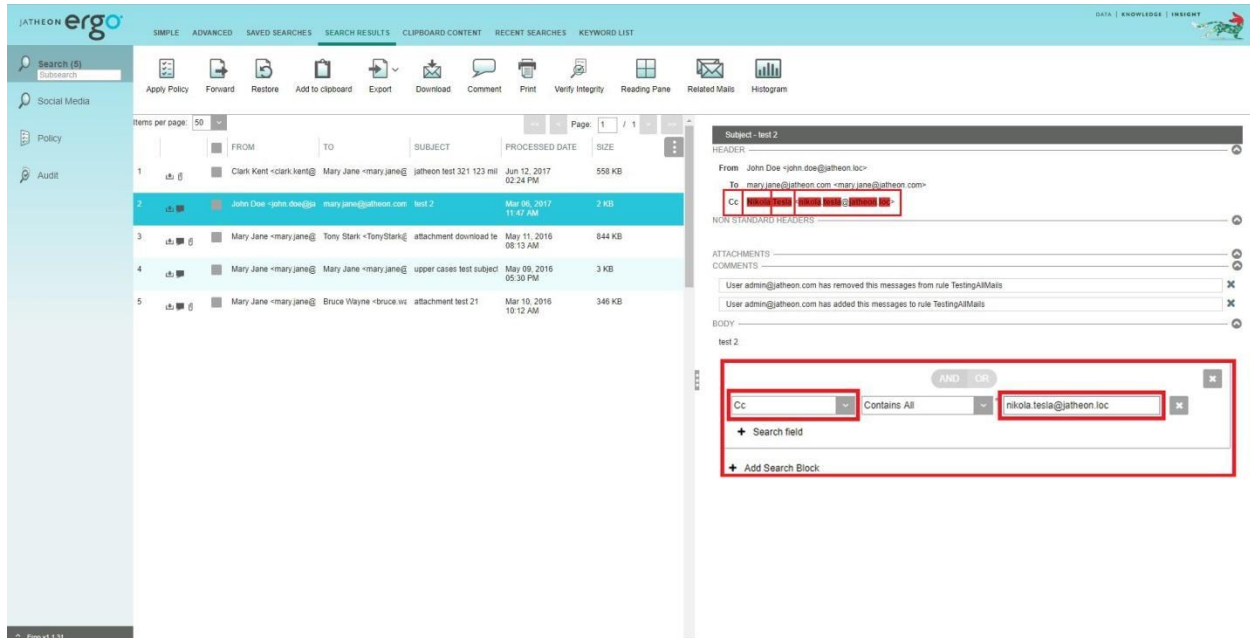


The screenshot shows the JATHEON ergo search results page. The search criteria are set to 'To'. The results table lists 15 items. The right-hand pane shows the details for 'Test 4', including the header 'To: Mary Jane <mary.jane@jatheon.com>', non-standard headers, attachments, comments, and the body text 'Test 4 test:'. A search filter is visible at the bottom right, showing 'To' and 'Contains All' with the search term 'john.doe@jatheon.com'.

	FROM	TO	SUBJECT	PROCESSED DATE	SIZE
2	Microsoft Outlook <falcon@jatheon.com>	john.doe@jatheon.com	Undeliverable: test 2	Mar 06, 2017 11:47 AM	8 KB
3	John Doe <john.doe@jatheon.com>	john.doe@jatheon.com		Mar 06, 2017 09:29 AM	1 KB
4	john.doe@jatheon.com	john.doe@jatheon.com	Simplicity in excellence	Feb 27, 2017 01:51 PM	2 KB
5	John Doe <john.doe@jatheon.com>	John Doe <john.doe@jatheon.com>	RE: Subject test 10	Feb 23, 2017 04:23 PM	1 KB
6	Mary Jane <mary.jane@jatheon.com>	John Doe <john.doe@jatheon.com>	RE: Subj test 6	Feb 23, 2017 12:40 PM	1 KB
7	Mary Jane <mary.jane@jatheon.com>	John Doe <john.doe@jatheon.com>	RE: Test 4	Feb 23, 2017 12:09 PM	1 KB
8	Mary Jane <mary.jane@jatheon.com>	John Doe <john.doe@jatheon.com>	RE: Test 4	Feb 23, 2017 11:58 AM	1 KB
9	Mary Jane <mary.jane@jatheon.com>	John Doe <john.doe@jatheon.com>	RE: test	Feb 23, 2017 11:58 AM	7 KB
10	Mary Jane <mary.jane@jatheon.com>	John Doe <john.doe@jatheon.com>	RE: Subject test 3	Feb 23, 2017 11:58 AM	1 KB
11	Mary Jane <mary.jane@jatheon.com>	John Doe <john.doe@jatheon.com>	test	Feb 23, 2017 11:44 AM	8 KB
12	Microsoft Outlook <falcon@jatheon.com>	john.doe@jatheon.com	Undeliverable: test 5	Feb 23, 2017 11:50 AM	7 KB
13	Microsoft Outlook <falcon@jatheon.com>	john.doe@jatheon.com	Undeliverable: test	Feb 23, 2017 10:37 AM	16 KB
14	Microsoft Outlook <falcon@jatheon.com>	john.doe@jatheon.com	Undeliverable: test 1	Feb 23, 2017 10:36 AM	9 KB
15	John Doe <john.doe@jatheon.com>	John Doe <john.doe@jatheon.com>	RE: test	Feb 23, 2017 10:34 AM	5 KB

Cc

This field will search only for **Recipient(s)** of emails/messages that was/were added in the **Cc** section and nowhere else. It can be a single word, first name or last name, an entire email address or domain or different combinations. Here you can see what was used as the keyword for **Cc** field, and what will be displayed and highlighted on the search results page/tab.

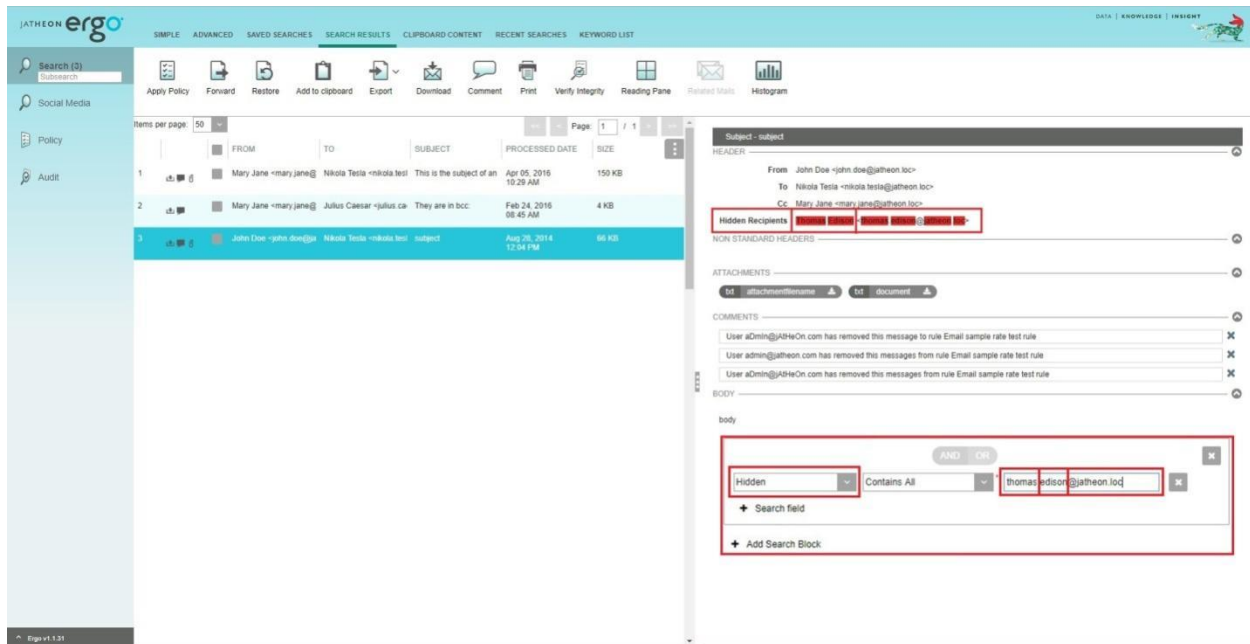


Bcc/Hidden

These fields will search only for **Recipient(s)** of emails/messages that was/were added in the **Hidden/ Bcc** section (**Blind Carbon Copy**) and nowhere else.

It can be a single word, first name or last name, an entire email address or domain or different combinations. Here you can see what was used as the keyword for **Hidden/Bcc** fields and what will be displayed and highlighted on the search results page/tab.

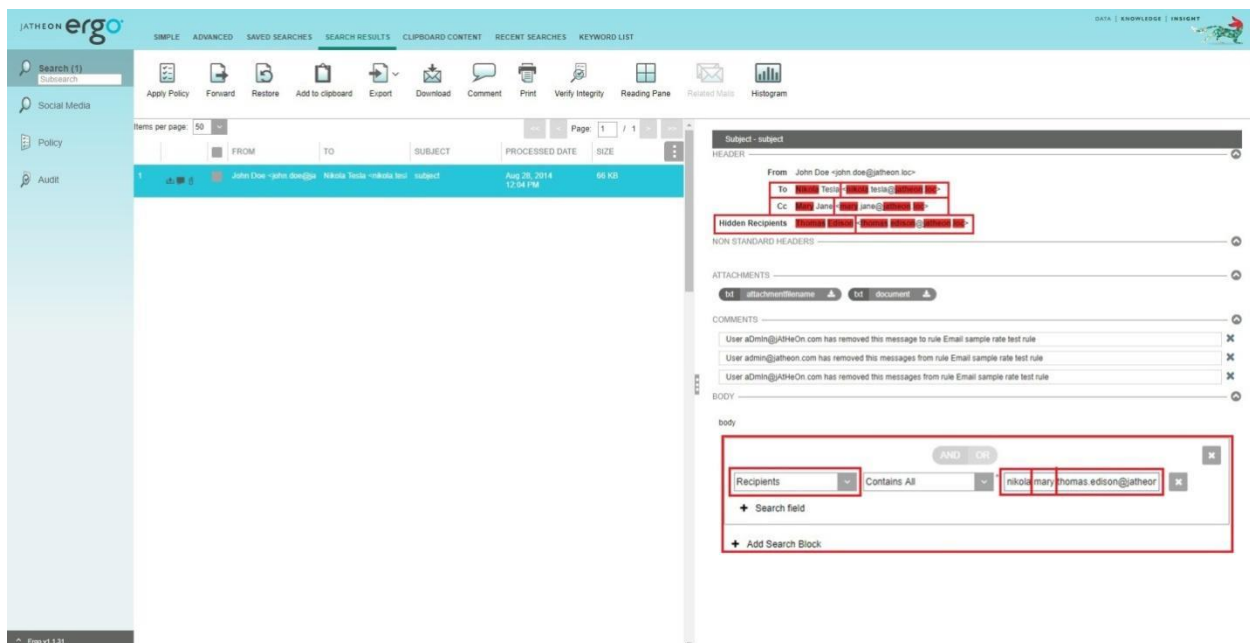
Depending on your email server setup/type and email types that are being processed, you can use the Hidden or Bcc option to search for hidden recipients.



The screenshot shows the JATHEON ergo search results page. The search criteria are set to 'Subject'. The results table shows three items. The first item is highlighted, showing details for an email from John Doe to Nikola Tesla. The right-hand pane shows the email details, including the 'Hidden Recipients' field, which is highlighted with a red box. The 'Hidden Recipients' field contains the text 'thomas.edison@jatheon.io'.

Recipients

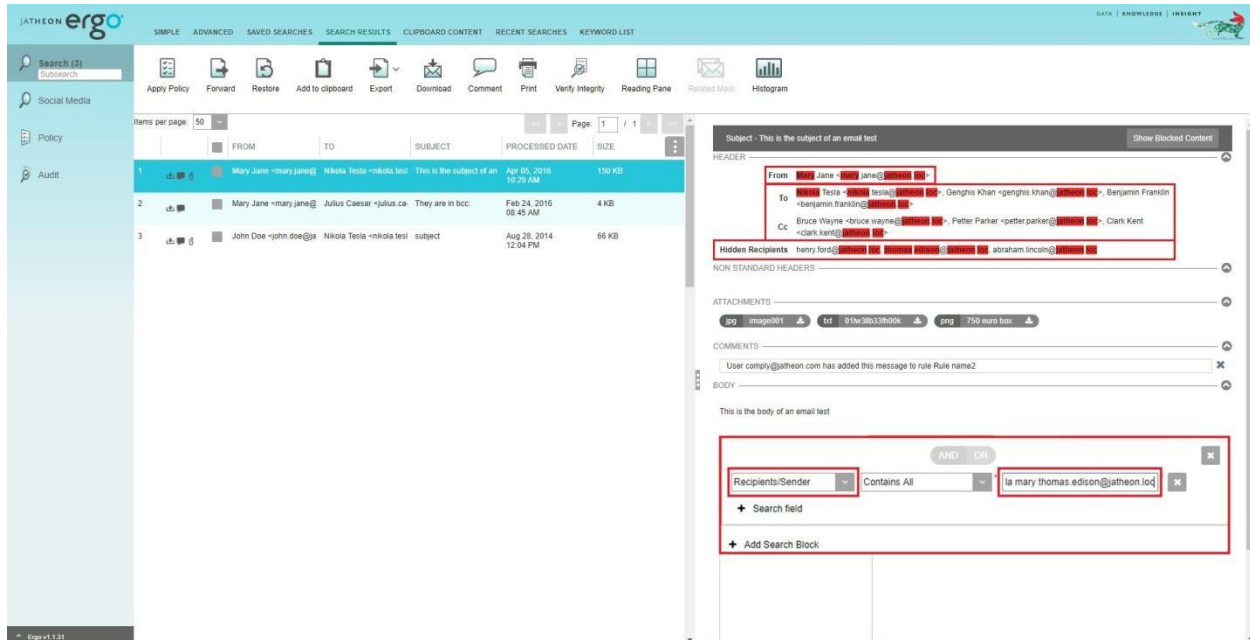
This field will search for all recipients of email/messages that were added in any of the following sections: **To**, **Cc**, **Bcc** or **Hidden**. Your query can be a single word, first name or last name, an entire email address or domain or different combinations. Here you can see what was used as the keyword for **Hidden** field, and what will be displayed and highlighted on the search results page/tab.



The screenshot shows the JATHEON ergo search results page. The search criteria are set to 'Recipients'. The results table shows three items. The first item is highlighted, showing details for an email from John Doe to Nikola Tesla. The right-hand pane shows the email details, including the 'Recipients' field, which is highlighted with a red box. The 'Recipients' field contains the text 'nikola.mary.thomas.edison@jatheon.io'.

Recipients/Sender

This field will search for **Sender** and **Recipient(s)** of email/messages that were added in any of the following sections: **From**, **To**, **Cc**, **Bcc** and **Hidden**. Your query can be a single word, first name or last name, an entire email address or domain or different combinations. Here you can see what was used as the keyword for **Recipients/Sender** field, and what will be displayed and highlighted on the search results page/tab.



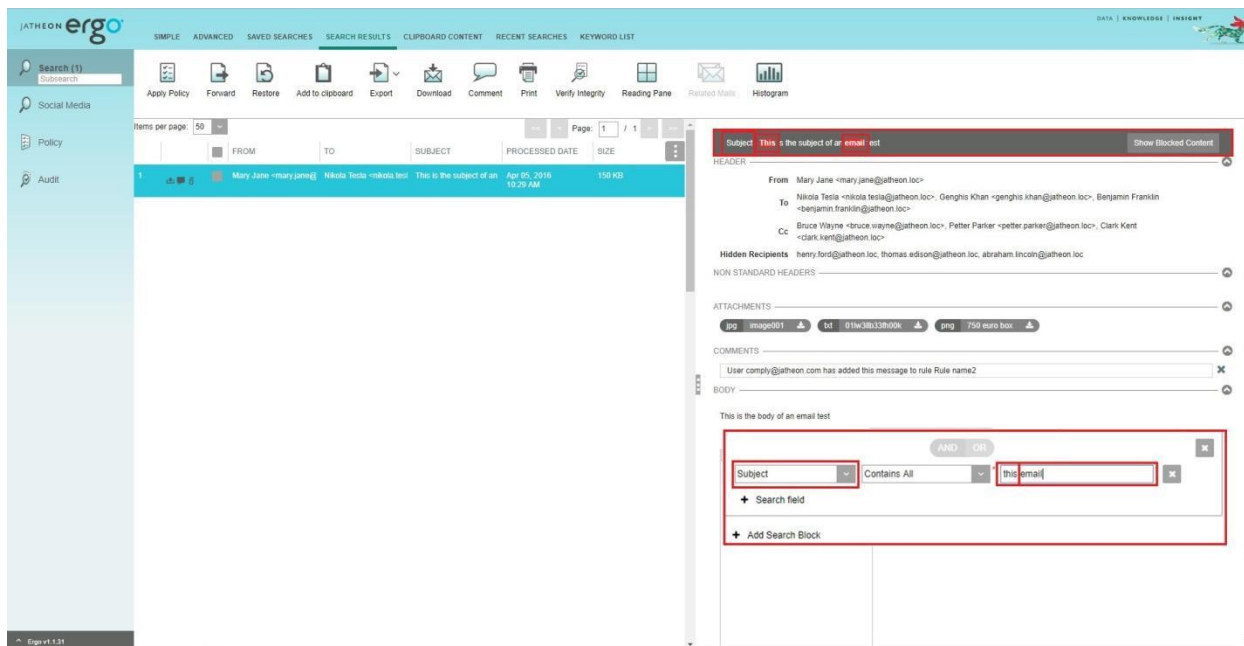
The screenshot displays the JATHEON ergo search interface. On the left, there is a sidebar with navigation options: Search (3), Social Media, Policy, and Audit. The main area shows search results for the keyword 'mary jane'. The results table has columns for FROM, TO, SUBJECT, PROCESSED DATE, and SIZE. Three results are listed:

	FROM	TO	SUBJECT	PROCESSED DATE	SIZE
1	Mary Jane <mary.jane@jatheon.com>	Nikola Tesla <nikola.tesla@jatheon.com>	This is the subject of an email test	Apr 05, 2016 10:29 AM	150 KB
2	Mary Jane <mary.jane@jatheon.com>	Julius Caesar <julius.ca@jatheon.com>	They are in bcc	Feb 24, 2016 08:45 AM	4 KB
3	John Doe <john.doe@jatheon.com>	Nikola Tesla <nikola.tesla@jatheon.com>	subject	Aug 28, 2014 12:04 PM	66 KB

On the right, a detailed view of the selected email is shown. The 'HEADER' section includes 'From', 'To', 'Cc', and 'Hidden Recipients'. The 'ATTACHMENTS' section lists 'image001', 'b1', 'b1w3b32b00k', and 'jpg'. The 'COMMENTS' section shows a note: 'User comply@jatheon.com has added this message to rule Rule name2'. The 'BODY' section contains the text 'This is the body of an email test'. At the bottom, a search filter is applied: 'Recipients/Sender' contains 'la mary thomas edison@jatheon.com'.

Subject

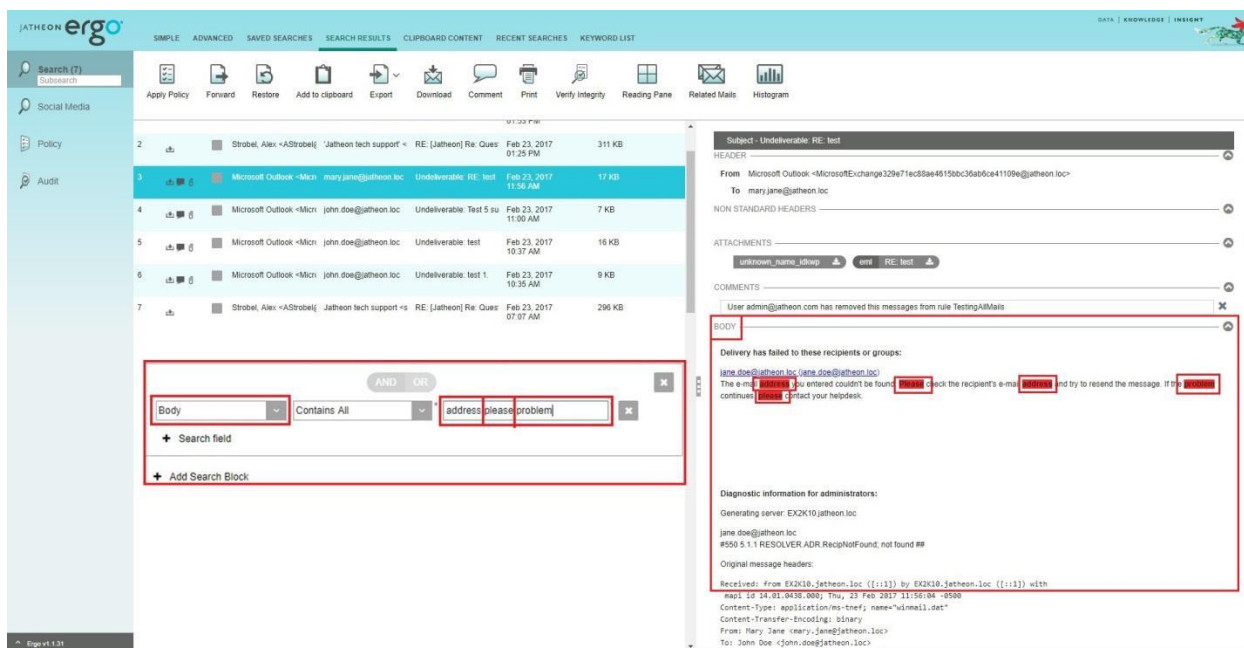
This field will search only in the **Subject** section of emails/messages and nowhere else. Your query can be a single word or more words, first name or last name. It can also contain numbers, special characters, or any combinations of previous things. Here you can see what was used as the keyword for **Subject** field, and what will be displayed and highlighted on the search results page/tab.



The screenshot shows the JATHEON ergo interface. On the left, there's a sidebar with 'Search (1)', 'Social Media', 'Policy', and 'Audit'. The main area displays a search result for 'this is the subject of an email test'. The email details are shown on the right, including the header, attachments, and body. The body text is 'This is the body of an email test'. A red box highlights the search criteria: 'Subject' contains 'this email'.

Body

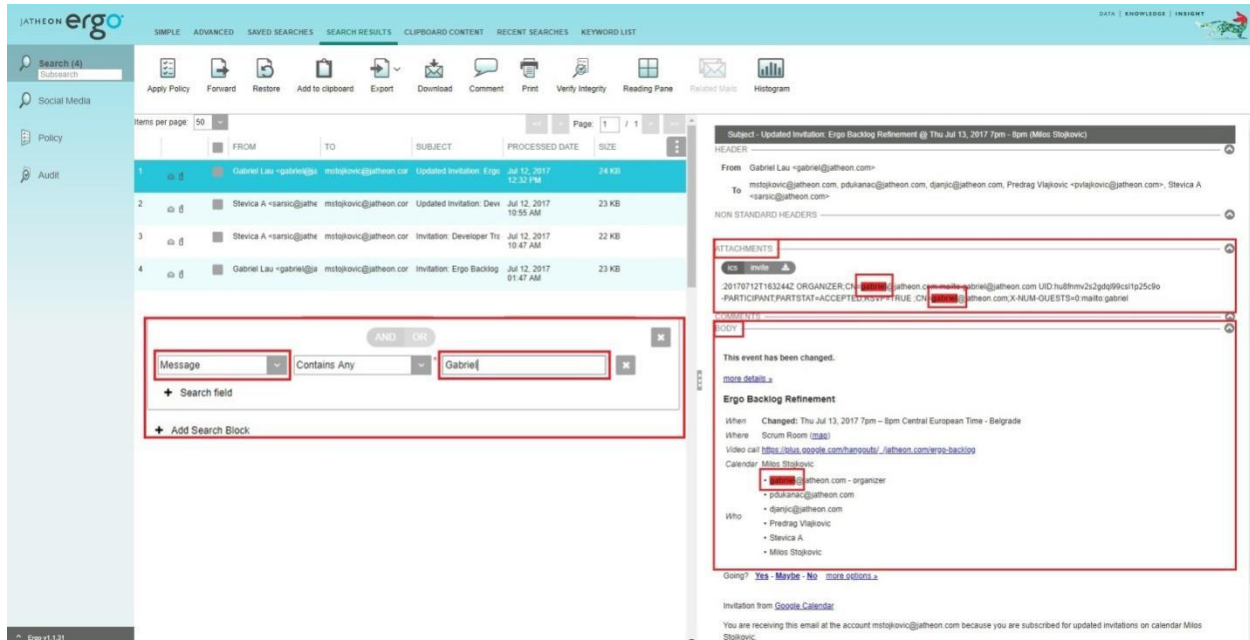
This field will search only in the **Body** section of emails/messages and nowhere else. Your query can be a single word or more words, first name or last name. Here you can also use numbers, special characters, or any combinations of previous things. Here you can see what was used as the keyword for **Body** field, and what will be displayed and highlighted on the search results page/tab.



The screenshot shows the JATHEON ergo interface. On the left, there's a sidebar with 'Search (7)', 'Social Media', 'Policy', and 'Audit'. The main area displays a search result for 'address please problem'. The email details are shown on the right, including the header, attachments, and body. The body text is 'Delivery has failed to these recipients or groups: jane.doe@jatheon.loc (jane.doe@jatheon.loc)'. A red box highlights the search criteria: 'Body' contains 'address please problem'.

Message

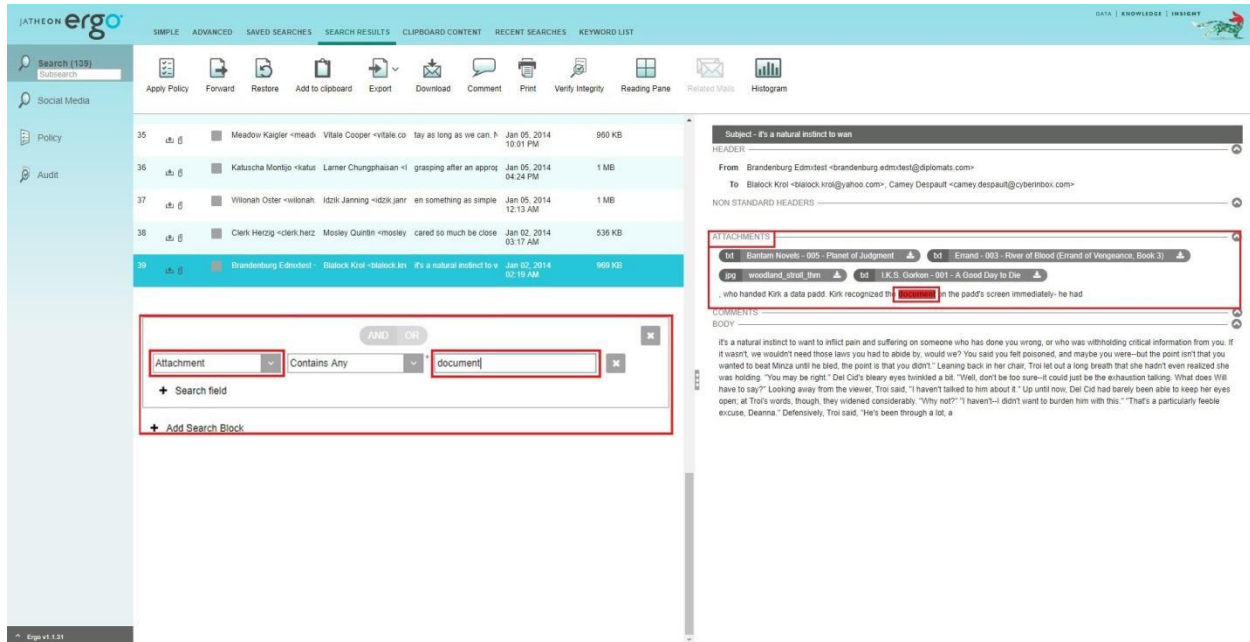
This field will search in 4 sections of an email/message: **Subject, Body, Attachment (File name and Data/Text inside of attachment file)**. Your query can be a single word or more words. Here you can also use numbers, special characters, or any combinations of previous things. Here you can see what was used as the keyword for **Message** field, and what will be displayed and highlighted on the search results page/tab.



The screenshot displays the JATHEON ergo search interface. On the left, a sidebar shows navigation options: Search (4), Social Media, Policy, and Audit. The main area shows search results for the 'Message' field. A table lists four results, each with a subject line, date, and size. The first result is 'Updated Invitation: Ergo Backlog Refinement @ Thu Jul 13, 2017 7pm - 8pm (Milo Stokovic)' from Gabriel Lau. Below the table, a search filter is applied: 'Message' contains 'Any' with the keyword 'Gabriel'. On the right, a detailed view of the selected email is shown, including the header, body, and attachments. The body text mentions 'This event has been changed.' and 'Ergo Backlog Refinement'.

Attachment – Text/Data Inside of Attachments

This field can search in 2 sections of email/message: **Attachment (File Name)** and **Text/data inside the attachment files**, depending on the condition. Your query can be a single word or more words, letters, numbers or any combinations of previous things. In this example for **Text/data inside attachments**, you can see what was used as the **keyword** for **Attachment** in combination with the condition, and what will be displayed and highlighted on the search results page/tab.

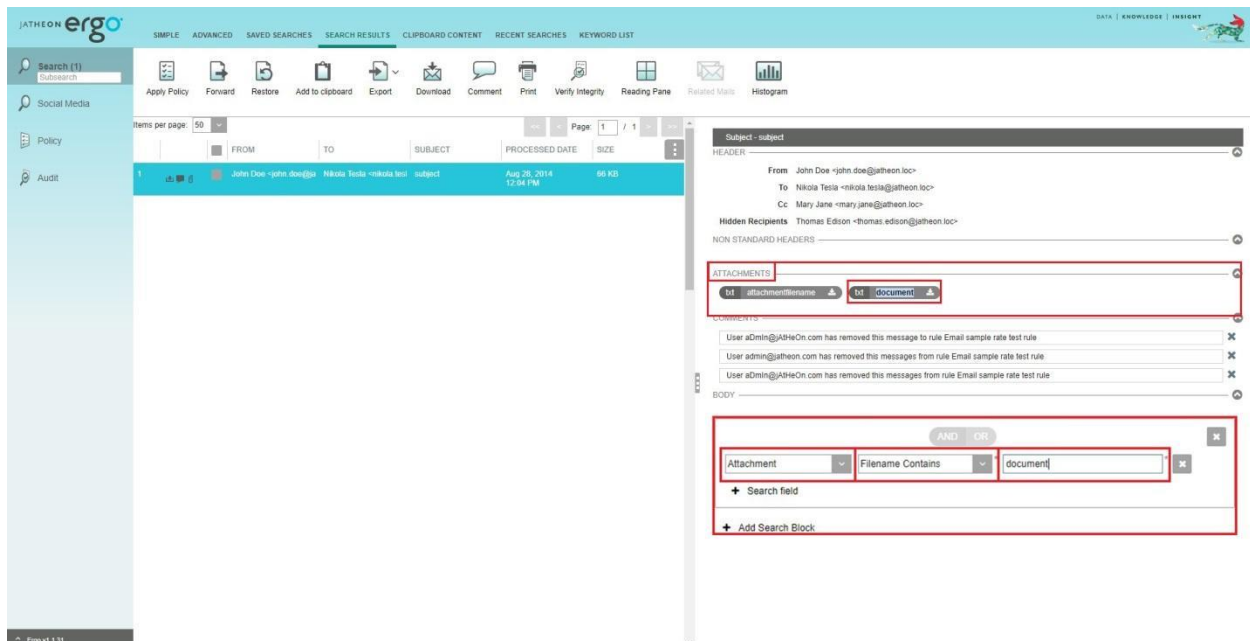


The screenshot shows the JATHEON ergo interface with search results for the keyword 'document'. The search criteria are set to 'Attachment' and 'Contains Any'. The results table lists several items, including email attachments and documents. The right pane shows the details of a selected email attachment, including the subject, from, to, and body text.

Item	Attachment	File Name	Date	Size
35	Meadow Kargler <meadow.kargler@vitale.co>	lay as long as we can	Jan 05, 2014 10:01 PM	950 KB
36	Katuscha Montjoie <katuscha.montjoie@lamer.ch>	grasping after an approx	Jan 05, 2014 04:24 PM	1 MB
37	Wiltonah Oster <wiltonah.oster@idzik.com>	en something as simple	Jan 05, 2014 12:13 AM	1 MB
38	Clerk Hertz <clerk.hertz@mosley.com>	cared so much be close	Jan 02, 2014 03:17 AM	536 KB
39	Brandenburg Edmtest <brandenburg.edmtest@diplomats.com>	it's a natural instinct to wan	Jan 02, 2014 02:10 AM	950 KB

Attachment – File Name

In this example of search done by **Attachment File Name**, you can see what was used as the keyword for **Attachment** in combination with **condition File Name Contains**, and what will be displayed and highlighted on the search results page/tab.



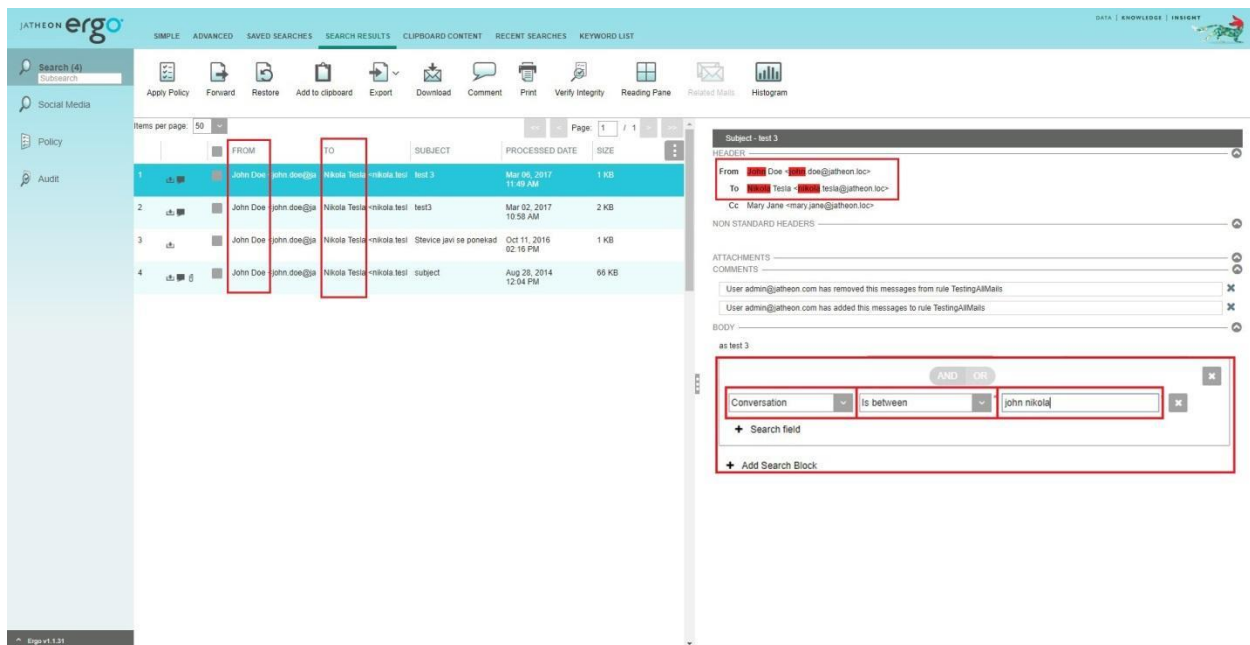
The screenshot shows the JATHEON ergo interface with search results for the keyword 'document'. The search criteria are set to 'Attachment' and 'Filename Contains'. The results table lists several items, including email attachments and documents. The right pane shows the details of a selected email attachment, including the subject, from, to, and body text.

Item	Attachment	File Name	Date	Size
1	John Doe <john.doe@jatheon.com>	Subject	Aug 28, 2014 12:04 PM	90 KB

Conversation

This field will search for both Sender and Recipient of email/messages, and it will display all data that have e.g. John as sender + Nikola as receiver, or Nikola as sender + John as receiver. Your query can be a single word, first name or last name, an entire email address or domain or any other combination.

Here you can see what was used as the keyword for **Conversation** field, and what will be displayed and highlighted on the search results page/tab.



	FROM	TO	SUBJECT	PROCESSED DATE	SIZE
1	John Doe - john.doe@ja	Nikola Tesla - nikola.tesla@jath	test 3	Mar 06, 2017 11:49 AM	1 KB
2	John Doe - john.doe@ja	Nikola Tesla - nikola.tesla@jath	test3	Mar 02, 2017 10:58 AM	2 KB
3	John Doe - john.doe@ja	Nikola Tesla - nikola.tesla@jath	Stevica javi se ponekad	Oct 11, 2016 02:16 PM	1 KB
4	John Doe - john.doe@ja	Nikola Tesla - nikola.tesla@jath	subject	Aug 28, 2014 12:54 PM	66 KB

Subject: test 3

From: John Doe - john.doe@jath

To: Nikola Tesla - nikola.tesla@jath

Cc: Mary Jane - mary.jane@jath

NON STANDARD HEADERS

ATTACHMENTS

COMMENTS

User admin@jath.com has removed this messages from rule TestingAllMails

User admin@jath.com has added this messages to rule TestingAllMails

BODY

as test 3

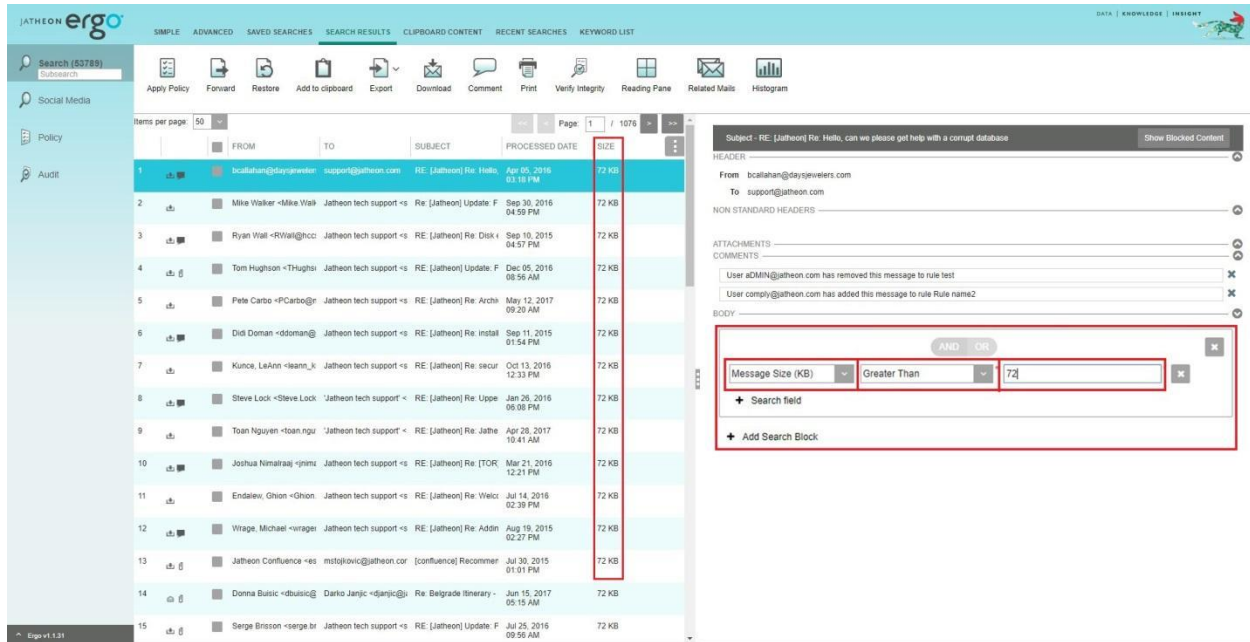
Conversation Is between john nikola

+ Search field

+ Add Search Block

Message Size

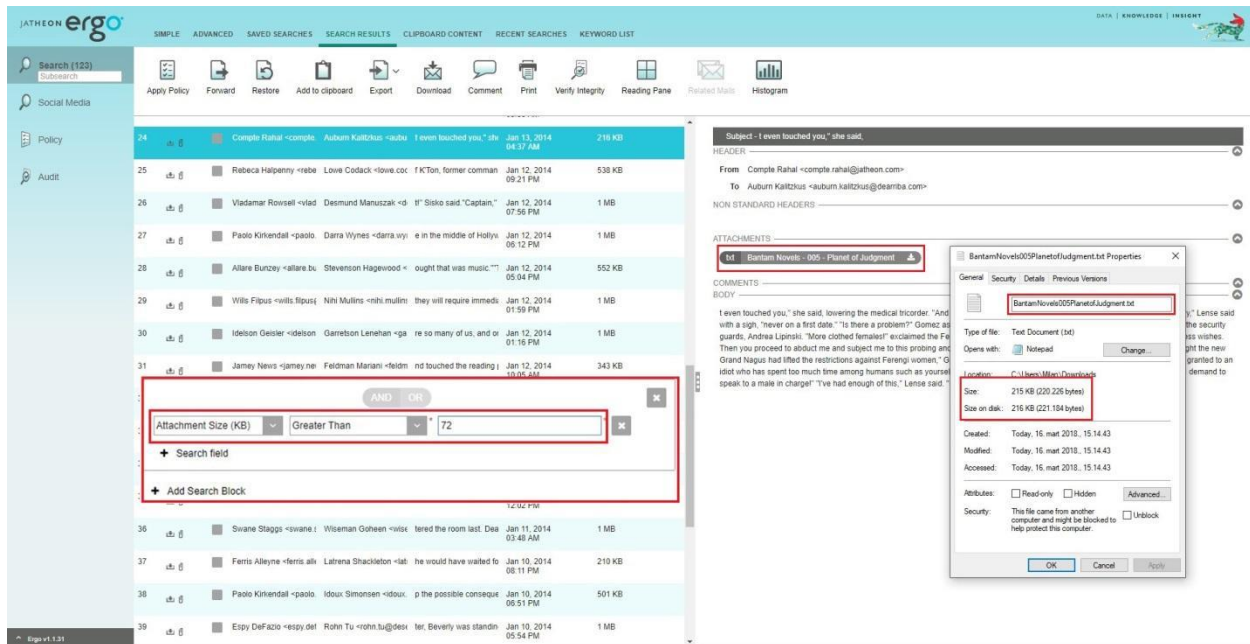
This field is self-explanatory. In this particular example, the system will display only emails that are larger than 72 KB because we used the condition **Greater Than**. You can set it up in reverse manner, using the other condition – **Less Than**. In this field, letters or special characters are forbidden. You can use only numbers.



The screenshot shows the JATHEON ergo interface. On the left, there's a sidebar with 'Search (53789)', 'Social Media', 'Policy', and 'Audit'. The main area displays a list of search results. The 'SIZE' column is highlighted, showing values like 72 KB. On the right, a detailed view of an email is shown. A search filter is applied: 'Message Size (KB) Greater Than 72'. The email header shows 'Subject: RE: [Jatheon] Re: Hello, can we please get help with a corrupt database'.

Attachment Size

This field is self-explanatory. In this particular example, the system will display only attachments that are larger than 72 KB because we used the condition **Greater Than**. You can set it up in reverse manner using the other condition – **Less Than**. In this field, letters or special characters are forbidden. You should use only numbers.



The screenshot shows the JATHEON ergo interface. On the left, there's a sidebar with 'Search (123)', 'Social Media', 'Policy', and 'Audit'. The main area displays a list of search results. The 'SIZE' column is highlighted, showing values like 210 KB, 530 KB, 1 MB, 552 KB, 1 MB, 1 MB, 343 KB, 1 MB, 210 KB, 501 KB, and 1 MB. On the right, a detailed view of an email is shown. A search filter is applied: 'Attachment Size (KB) Greater Than 72'. The email header shows 'Subject: I even touched you," she said,'. A file named 'BentamNovels - 005 - Planet of Judgment' is attached. A properties window for the attachment is open, showing details like 'Type of file: Text Document (.txt)', 'Size: 215 KB (220,226 bytes)', and 'Size on disk: 216 KB (221,184 bytes)'.

Field Conditions

This is the list of all conditions for all the fields. Under this list, you'll find a detailed explanation of every listed condition. Most of the conditions are repeated for similar fields and they are exactly the same. Some fields, however, have unique conditions.

- Contains All
- Contains Any
- Contains Phrase
- Not Contains Any
- Not Contains Phrase
- Less Than
- Greater Than
- In Group
- In OU
- Not In OU
- Not In Group
- Has Keyword
- Not Has Keyword
- File Name Contains
- File Name Not Contains
- Is Between

Contains All

If there's more than one keyword used, search will display only emails/messages that contain all of the specified keywords. If only one keyword is not found, that email/message will not be displayed.

Contains Any

If there's more than one keyword used, search will display all emails/messages that contain at least one of the specified keywords.

Contains Phrase

If there's more than one keyword used, search will display only emails/messages that have all the words in exactly the same order as specified in the query, not just anywhere in the email/message.

Not Contains Any

If there's more than one keyword used, search will display only results that don't contain any of the specified keywords. If there's only one keyword found, that email/message will not be displayed.

Not Contains Phrase

If there's more than one keyword used, search will display only emails/messages that don't contain all the words used, but only if they are in exactly the same order as specified, not just anywhere in the email/message.

Less Than

With this option you have to use numbers only. If you use this option in combination with To, Cc, Hidden etc., search will display only emails that have a smaller number of recipients than specified by your keyword. The condition is just less, not equal or less. So if you're looking for 3 recipients in To, Cc or Hidden, remember to use 4 as the keyword.

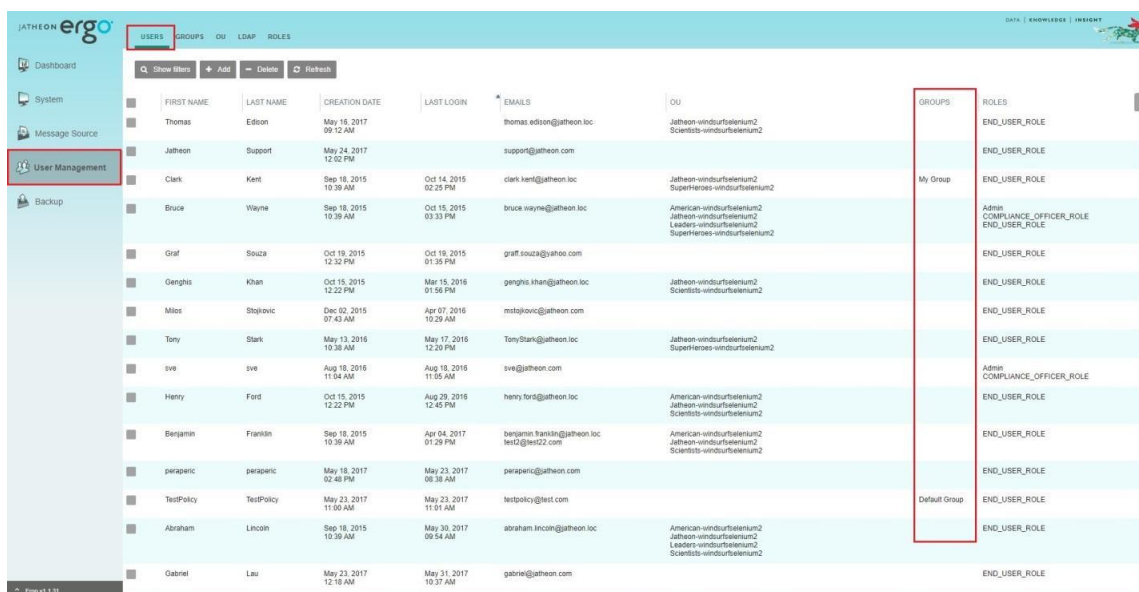
Greater Than

With this option you have to use numbers only. If you use this option in combination with To, Cc or Hidden, search will display only emails that have a higher number of recipients than specified by your keyword. The condition is just greater, not equal or greater. So if you're looking for 3 recipients in To, Cc or Hidden, remember to use 2 as the keyword.

In Group

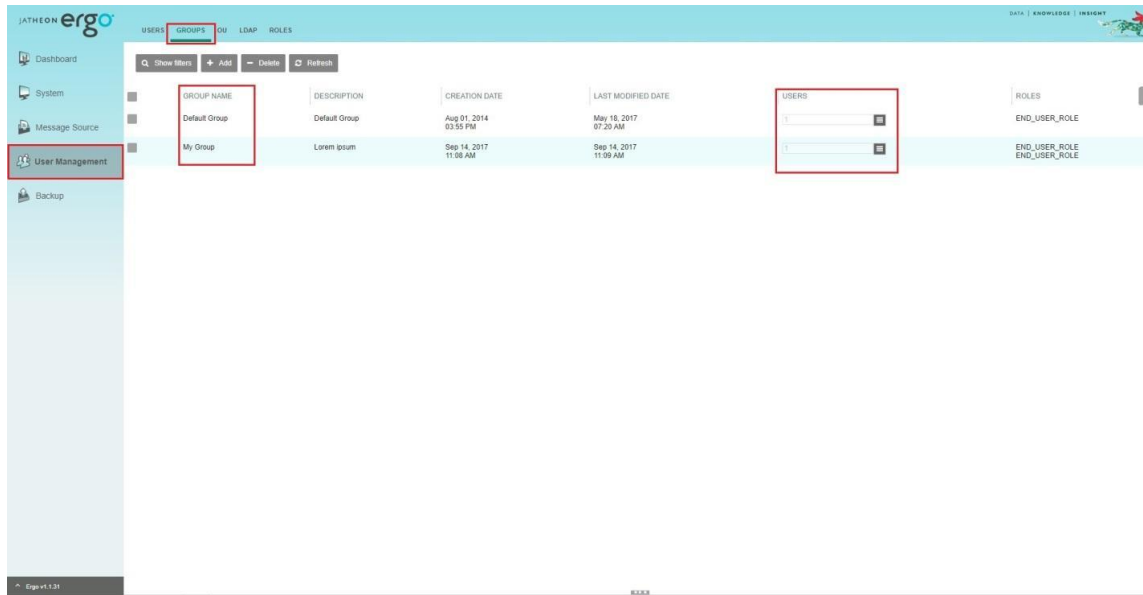
Group is a value that's created in the Admin menu and allows you to assign users to specific groups. The In Group condition only appears when you search for recipients or senders of emails and messages. Searching for email address-related fields such as From, To, Cc etc. will let you use this condition. The displayed results will only include emails/messages that contain users that belong to the specified group.

You can find out which users belong to what groups in: Admin menu → User Management → Users



FIRST NAME	LAST NAME	CREATION DATE	LAST LOGIN	EMAILS	OU	GROUPS	ROLES
Thomas	Edison	May 15, 2017 09:12 AM		thomas.edison@jatheon.loc	Jatheon-vindurfaelenum2		END_USER_ROLE
Jatheon	Support	May 24, 2017 12:02 PM		support@jatheon.com	Scientist-vindurfaelenum2		END_USER_ROLE
Clark	Kent	Sep 18, 2015 10:39 AM	Oct 14, 2016 02:25 PM	clark.kent@jatheon.loc	Jatheon-vindurfaelenum2	My Group	END_USER_ROLE
Bruce	Wayne	Sep 18, 2015 10:39 AM	Oct 15, 2015 03:33 PM	bruce.wayne@jatheon.loc	American-vindurfaelenum2		Admin COMPLIANCE_OFFICER_ROLE
Graf	Souza	Oct 19, 2015 12:32 PM	Oct 19, 2015 01:35 PM	graf.souza@jatheon.com	Superheroes-vindurfaelenum2		END_USER_ROLE
Genghis	Khan	Oct 15, 2015 12:22 PM	Mar 15, 2016 01:56 PM	genghis.khan@jatheon.loc	Jatheon-vindurfaelenum2		END_USER_ROLE
Milos	Stojkovic	Dec 02, 2015 07:43 AM	Apr 07, 2016 10:29 AM	mstojkovic@jatheon.com	Scientist-vindurfaelenum2		END_USER_ROLE
Tony	Stark	May 13, 2016 10:38 AM	May 17, 2016 12:20 PM	TonyStark@jatheon.loc	Jatheon-vindurfaelenum2		END_USER_ROLE
Ive	Ive	Aug 18, 2016 11:04 AM	Aug 18, 2016 11:56 AM	ive@jatheon.com	Superheroes-vindurfaelenum2		Admin COMPLIANCE_OFFICER_ROLE
Henry	Ford	Oct 15, 2015 12:22 PM	Aug 29, 2016 12:45 PM	henry.ford@jatheon.loc	American-vindurfaelenum2		END_USER_ROLE
Benjamin	Franklin	Sep 18, 2015 10:39 AM	Apr 04, 2017 01:28 PM	benjamin.franklin@jatheon.loc	Scientist-vindurfaelenum2		END_USER_ROLE
peraperc	peraperc	May 18, 2017 02:48 PM	May 23, 2017 11:07 AM	peraperc@jatheon.com	Jatheon-vindurfaelenum2		END_USER_ROLE
TestPolicy	TestPolicy	May 23, 2017 11:00 AM	May 23, 2017 11:07 AM	testpolicy@test.com	Scientist-vindurfaelenum2		END_USER_ROLE
Abraham	Lincoln	Sep 18, 2015 10:39 AM	May 30, 2017 09:54 AM	abraham.lincoln@jatheon.loc	American-vindurfaelenum2		END_USER_ROLE
Gabriel	Leu	May 23, 2017 12:18 AM	May 31, 2017 10:37 AM	gabriel@jatheon.com	Jatheon-vindurfaelenum2		END_USER_ROLE

or in the Group section.



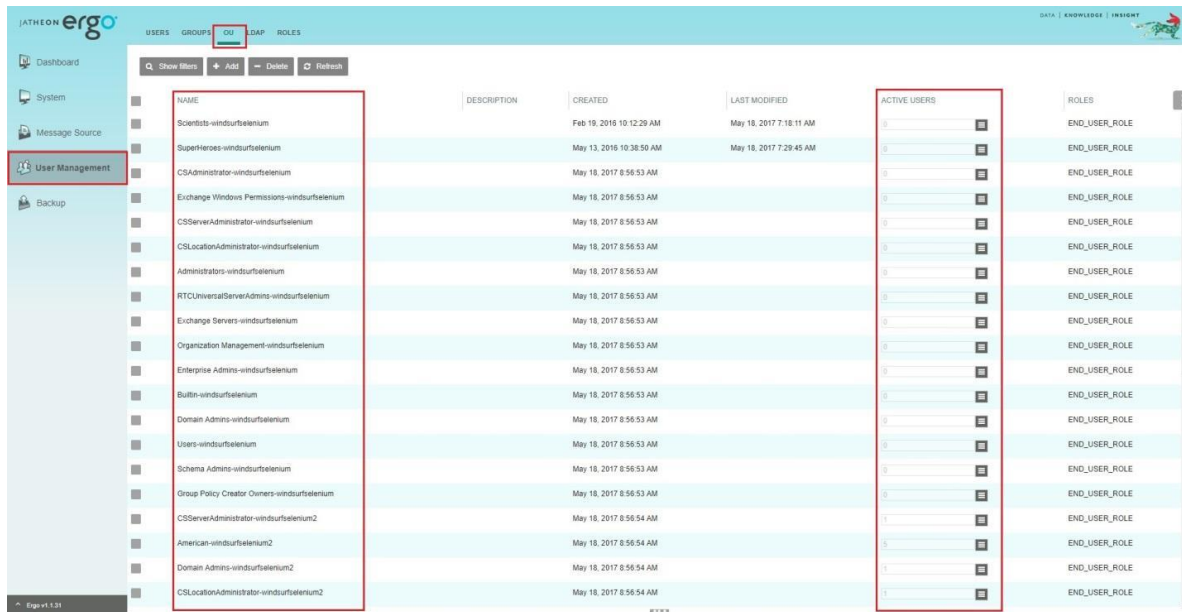
In OU

OU is a value that you can find in the Admin menu for users imported via LDAP option. The In Group condition only appears when you search for recipients or senders of emails and messages. Searching for email address-related fields such as From, To, Cc etc. will let you use this condition. The displayed results will only include emails/messages that contain users that belong to the specified OU.

You can find out what users have what OU in Admin menu → User management → Users



and in the OU section.



NAME	DESCRIPTION	CREATED	LAST MODIFIED	ACTIVE USERS	ROLES
Scientists-windurftelium		Feb 19, 2016 10:12:29 AM	May 18, 2017 7:18:11 AM	1	END_USER_ROLE
SuperHeroes-windurftelium		May 13, 2016 10:38:50 AM	May 18, 2017 7:29:45 AM	1	END_USER_ROLE
CSAdministrator-windurftelium		May 18, 2017 8:56:53 AM		1	END_USER_ROLE
Exchange Windows Permissions-windurftelium		May 18, 2017 8:56:53 AM		1	END_USER_ROLE
CSAdministrator-windurftelium		May 18, 2017 8:56:53 AM		1	END_USER_ROLE
CSLocationAdministrator-windurftelium		May 18, 2017 8:56:53 AM		1	END_USER_ROLE
Administrators-windurftelium		May 18, 2017 8:56:53 AM		1	END_USER_ROLE
RTCUrbanServerAdmin-windurftelium		May 18, 2017 8:56:53 AM		1	END_USER_ROLE
Exchange Servers-windurftelium		May 18, 2017 8:56:53 AM		1	END_USER_ROLE
Organization Management-windurftelium		May 18, 2017 8:56:53 AM		1	END_USER_ROLE
Enterprise Admins-windurftelium		May 18, 2017 8:56:53 AM		1	END_USER_ROLE
BuiltIn-windurftelium		May 18, 2017 8:56:53 AM		1	END_USER_ROLE
Domain Admins-windurftelium		May 18, 2017 8:56:53 AM		1	END_USER_ROLE
Users-windurftelium		May 18, 2017 8:56:53 AM		1	END_USER_ROLE
Schema Admins-windurftelium		May 18, 2017 8:56:53 AM		1	END_USER_ROLE
Group Policy Creator Owners-windurftelium		May 18, 2017 8:56:53 AM		1	END_USER_ROLE
CSAdministrator-windurftelium2		May 18, 2017 8:56:54 AM		1	END_USER_ROLE
American-windurftelium2		May 18, 2017 8:56:54 AM		1	END_USER_ROLE
Domain Admins-windurftelium2		May 18, 2017 8:56:54 AM		1	END_USER_ROLE
CSLocationAdministrator-windurftelium2		May 18, 2017 8:56:54 AM		1	END_USER_ROLE

Not in Group

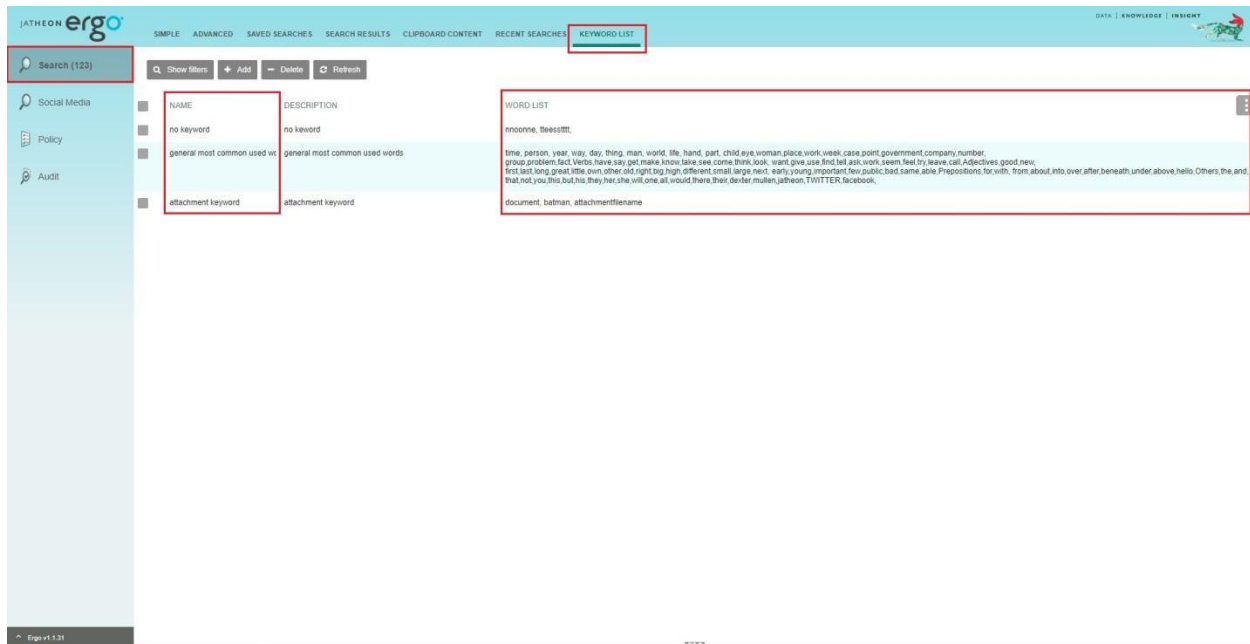
Search will only display email/messages that don't contain users within the searched group. You can find out what users belong to what groups in Admin menu → User management → Users, and in the screenshot above (regarding Groups).

Not in OU

Search will only display email/messages that don't contain users within the searched OU. You can find out what users belong to which OU in Admin menu → User management → Users/OU, and in the screenshot above.

Has Keyword

Keyword is a value that must be previously created using a word list, and only then will it appear in Advanced Search as a proper field condition. You can find and create keywords in: Main Search Menu → Search → Keyword List. Search will display any email/messages that contain any of the words from the word lists for the specified Keyword.



Not Has Keyword

Search will display email/messages that do not contain any of the words from the word lists for the specified Keyword.

File Name Contains

This option only appears for Attachment search criteria. Search will display only emails that got attachment but only with wanted file name.

File Name Not Contains

This option only appears for Attachment search criteria. Search will display only emails that have an attachment but not with the specified file name.

Is Between

This option only appears for Conversation search criteria. Search will display only emails that have the sender and recipients repeating in sender or recipients sections of email/messages. It will search into From and To fields.

Fields and Available Conditions

Field	Conditions
From	Contains All
To	Contains Any
Cc	Contains Phrase
Bcc	Not Contains Any
Hidden	Not Contains Phrase
Recipients	Less Than
Recipients/Sender	Greater Than
	In Group
	In OU
	Not In OU
	Not In Group
	Has Keyword
	Not Has Keyword
Subject*	Contains All
Body	Contains Any
Message	Contains Phrase
	Not Contains Any
	Not Contains Phrase
	Has Keyword
	Not Has Keyword
	Starts With*
Attachment	Contains All
	Contains Any
	Contains Phrase
	Not Contains Any
	Not Contains Phrase
	Has Keyword
	Not Has Keyword
	File Name Contains
	File name Not Contains
Conversation	Is between
Message Size (KB)	Greater Than
Attachment Size (KB)	Less Than

* **Starts With** is only available in **Subject** field.

3. Policy

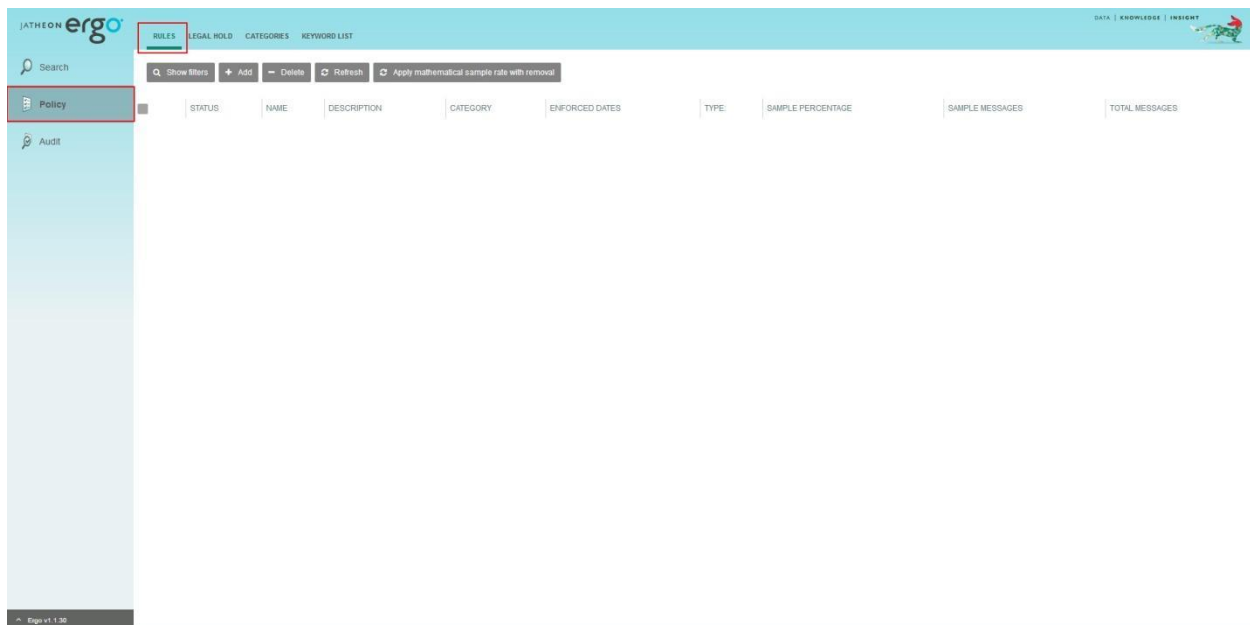
Rules

Rules are used to alert user(s) that some form of unwanted conversation or classified data exchange is happening. It's very easy to set up and customize a rule to tailor it to your own needs. There's no limit to the number of rules you can create and there's no limit regarding what rules should warn you about. It all depends on what keywords you will use.

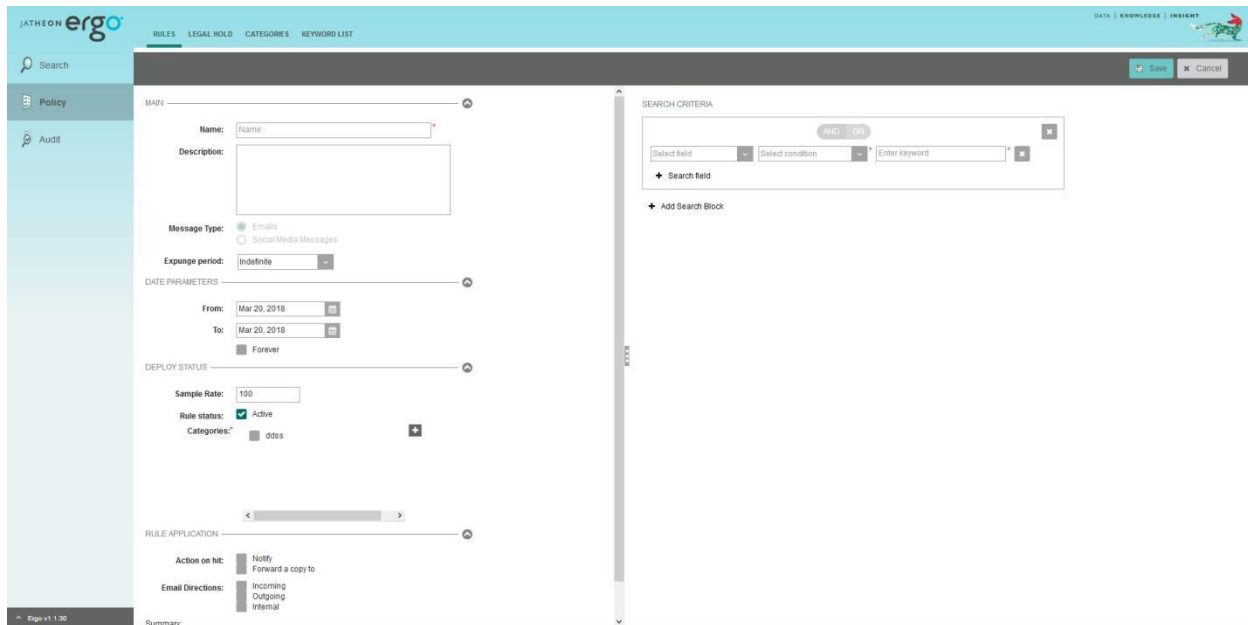
Emails can be sent to specific users when some rules fulfill the rule condition. You can use rules to alert you about inappropriate language, credit cards, phone numbers etc. Remember that this option is fully customizable and that your only limit is the keywords you want the conversations monitored for.

Rules Location

You will see the **Simple Search** section of the system, (default view after login). Click **Policy** on the left, and you'll see the **Rules tab**.



By clicking on the **Add** button, you'll expand the **Add/Edit Rule** section with all its options:



Options

Explanation

Name

This option allows you to name your rule, e.g. Credit Card Rule.

Description

Here you can write down a short description of hits that this rule will get and other information regarding email notifications or forwarding emails that triggered this rule.

Expiration period

With this option you can select the time period after which hits/emails that are in this rule will be deleted and removed from the rule and Jattheon's archiving system. If this option is set to Indefinite, emails/hits will never be removed from the rule or deleted from our system.

Dates

This option allows you to select From and To dates for the rule to get hits. Any emails that should be processed by this rule but are out of the specified date range will not be displayed in this rule.

Forever

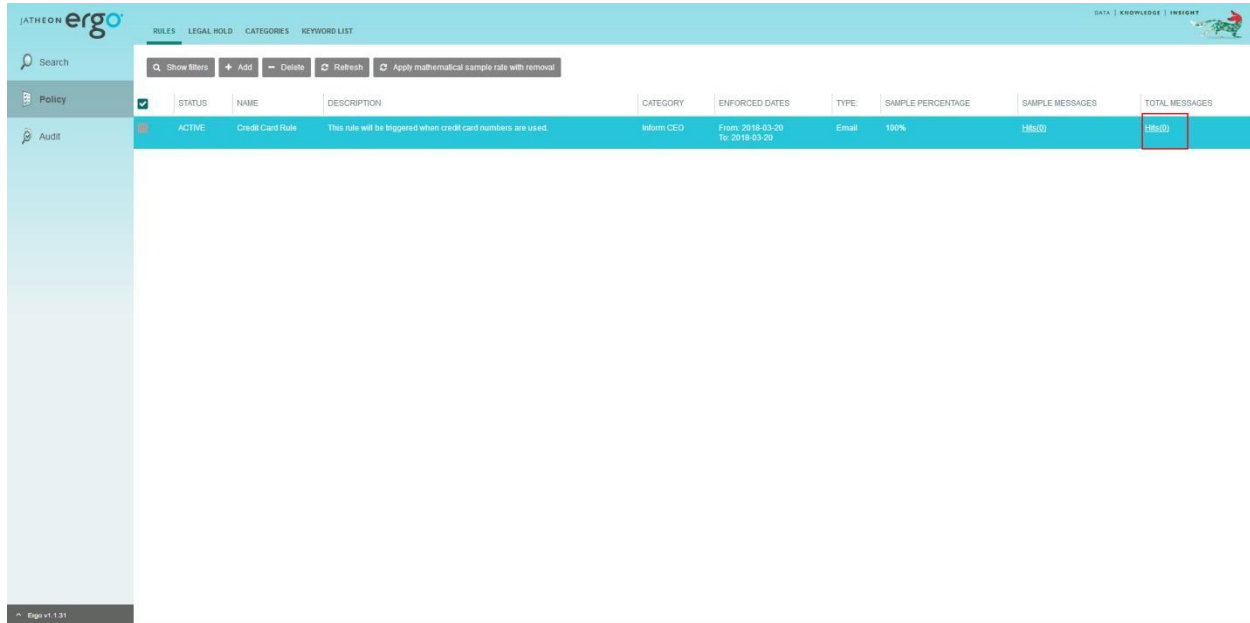
If you select this option, the To date will automatically be disabled. This means that the From date is the starting date and that there is no date when this rule should stop capturing emails/messages.

Sample Rate

The rule will get all hits/emails, but if you set up the sample rate to e.g. 60% and click on hits, you'll see only 60% of messages that trigger the rule.

Status	If this option is selected, it will make a rule active immediately after it's created. If this option is inactive, the rule won't get hits even when it should. Once it is changed to active again, the rule will start to get hits from that moment. Note that this won't affect emails that are already archived in the past.
Categories	This option allows you to choose the category for rules. You can create your own categories here or use the separate categories tab in the Policy section.
Action on hit: Notify	If this option is selected, enter an email of the person you want to be notified when any email is processed by this rule.
Action on hit: Forward a copy to	If this option is selected, enter an email of a person to whom you wish to forward a copy of the email that triggered the rule.
Action on hit: Do not archive	If this option is selected, any emails that trigger the rule will not be archived at all.
Email Directions: Incoming	If this option is selected, only incoming emails will be checked against the rule.
Email Directions: Outgoing	If this option is selected, only the emails that are going from the company/email domain to outside users will activate the rule.
Email Directions: Internal	If this option is selected, only emails that are going from the company/email domain user to another company user, will activate the rule.
Message Type	This field lets you select which type of messages you want the rule to apply to.
Search Criteria/Block Container	Here you can create any conditions that will trigger the Rule. Your only limitation is the keywords you can think of. In order to cover all three fields used in the example, it is recommended to use OR instead of AND because if a credit card number is only in one out of the three fields, the rule won't get hit. With OR selected, all it takes is just one condition.

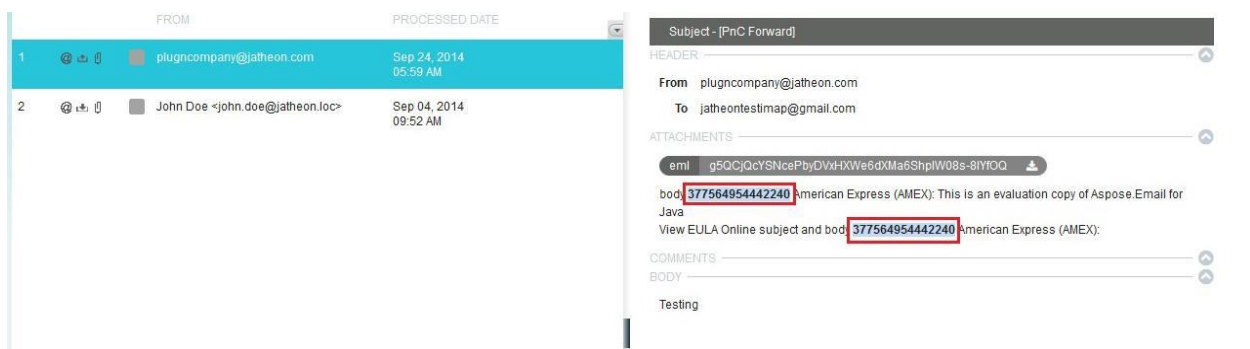
After a rule is created, it will appear on the rules list with all its columns: Name, Description, Category, Dates, Sample Rate, Status and Hits.



	STATUS	NAME	DESCRIPTION	CATEGORY	ENFORCED DATES	TYPE	SAMPLE PERCENTAGE	SAMPLE MESSAGES	TOTAL MESSAGES
	ACTIVE	Credit Card Rule	This rule will be triggered when credit card numbers are used.	Inform CEO	From: 2018-03-06 To: 2018-03-06	Email	100%	1	1

In this rule, the example we used was: If Subject, Body or Attachment contains any credit card numbers, the rule will get one hit per email. Rules are not retroactive. This means that there will be no hits on a rule for any emails that were already in the system and archived before the rule was created. Once created, the rule applies only to new, incoming emails.

When new emails are archived and if they fulfilled any of rule conditions, the rule will get one hit per email. In order to see all those emails that activated rule policies, all you need to do is click on the number of hits. The system will display results in a new tab.

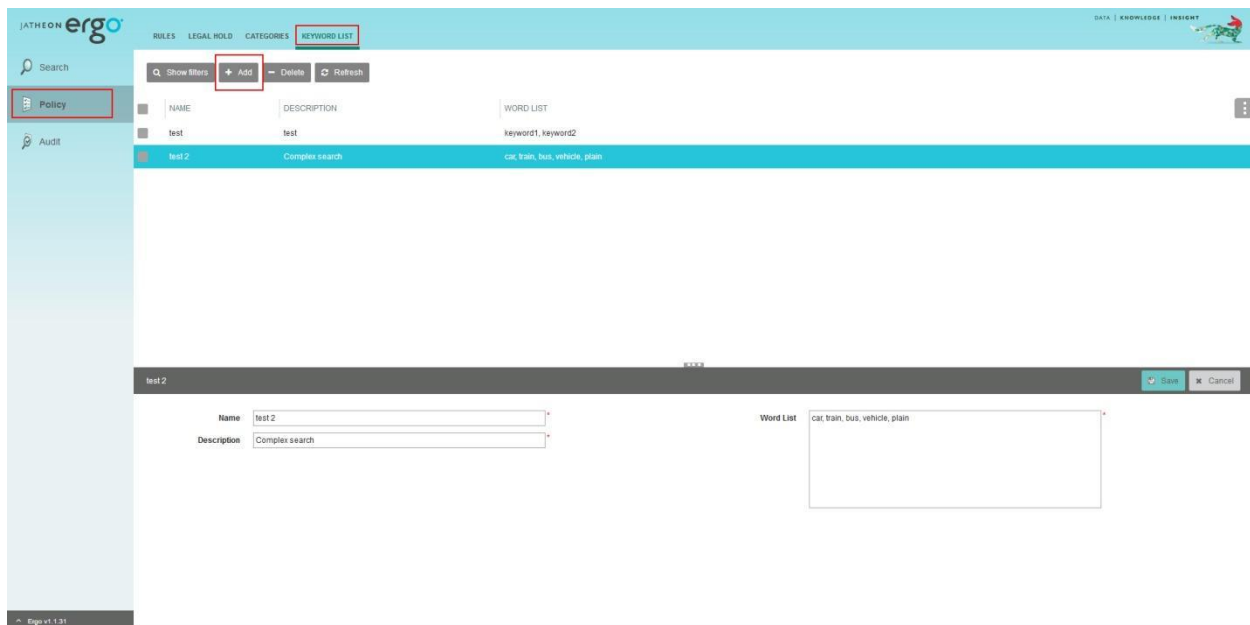


	FROM	PROCESSED DATE
1	plugnccompany@jatheon.com	Sep 24, 2014 05:59 AM
2	John Doe <john.doe@jatheon.io>	Sep 04, 2014 09:52 AM

Subject - [PnC Forward]	
HEADER	
From	plugnccompany@jatheon.com
To	jatheontestimap@gmail.com
ATTACHMENTS	
eml g5QCjQcYSNcePbyDVxHXWe6dXMa6ShplW08s-8lYIOQ	
body	377564954442240 American Express (AMEX): This is an evaluation copy of Aspose.Email for Java
View EULA Online subject and body 377564954442240 American Express (AMEX):	
COMMENTS	
BODY	
Testing	

Keyword List

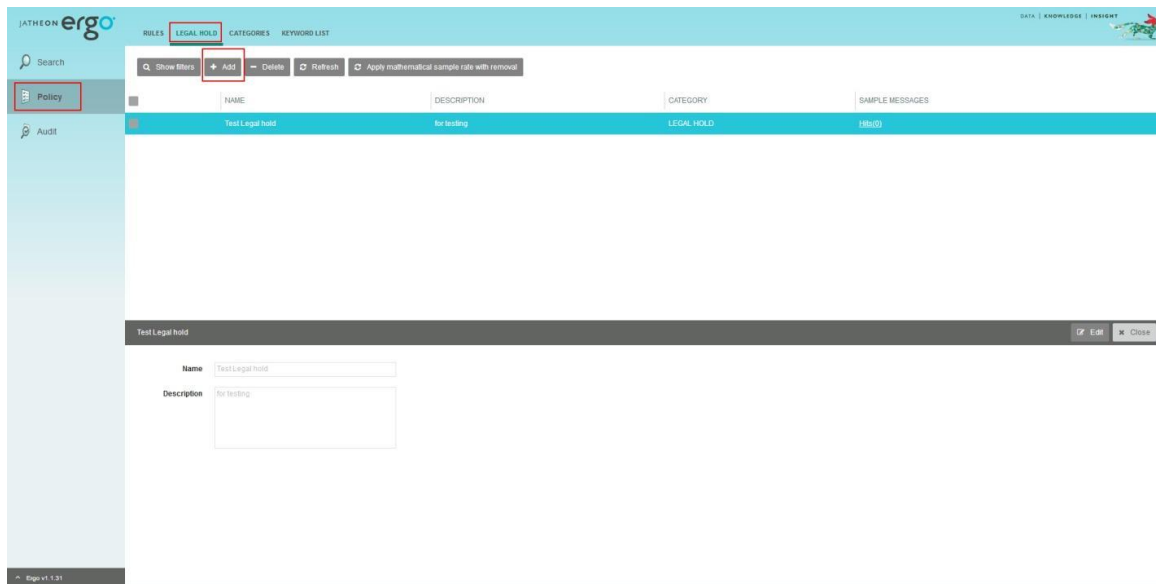
In the **Policy** section, there's the **Keyword List** tab. Click on **Add** button and you will expand the Add/Edit section. Name your keyword list, add a description and, most importantly, specify the **Word List**. A word list is an easy way to search multiple things because it will search all the desired words in a single field instead of adding the criteria one by one in Advanced Search.



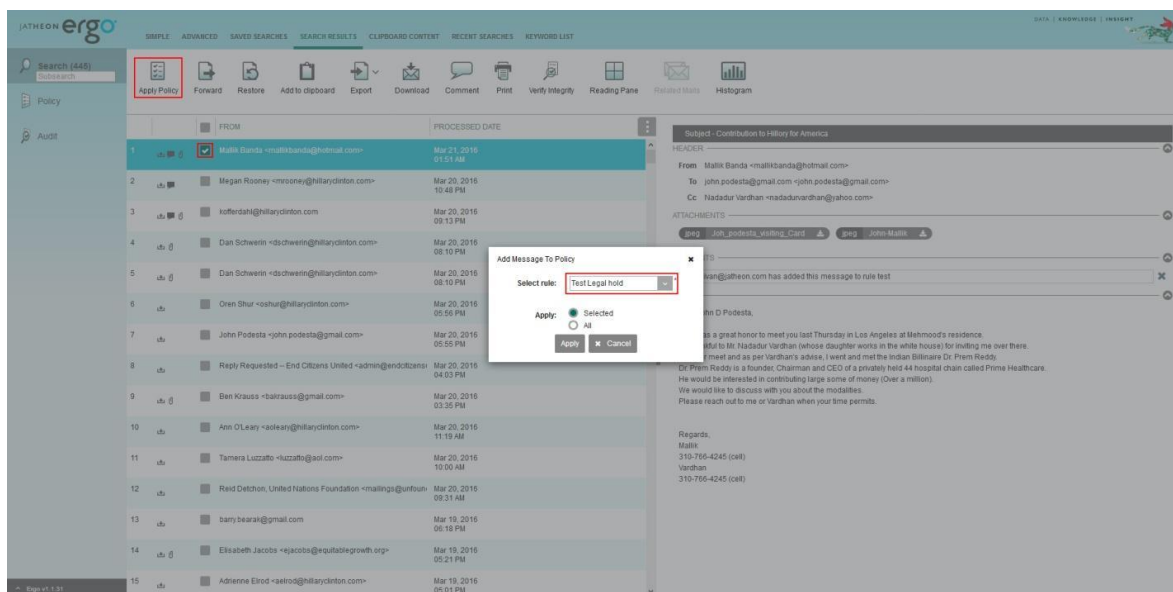
Any keyword created and saved will be visible in Advanced Search as one of the conditions.

Legal Hold

To create a new Legal Hold, go to the **Legal Hold** tab and click on **Add** button. The Add/Edit section will appear with all its data. After filling out Name and Description, just click on the **Save** button and a Legal Hold will be created.

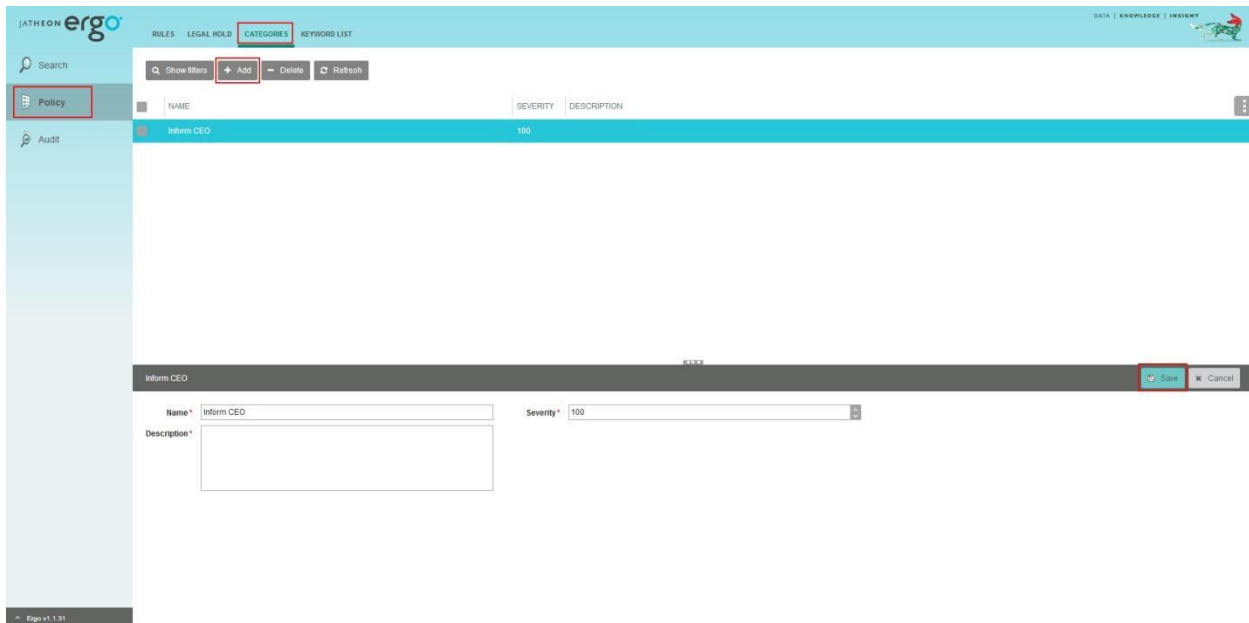


Legal Hold also has hits, but unlike Rules, you must add emails/messages manually. After performing Advanced or Simple Search and getting results, click on the message/email you want to add to legal hold. Click on Apply Policy icon. You'll then be able to choose between Legal Hold and active Rules.



Categories

Any categories that you created will be available as a choice to choose from on Rules Add/Edit page. You need to name your category, add a description and mark the severity of the category on a scale from 1 to 100. Click Save and you're done.



The screenshot displays the JATHEON ergo web application interface. At the top, the navigation bar includes 'RULES', 'LEGAL HOLD', 'CATEGORIES', and 'KEYWORD LIST'. The 'CATEGORIES' tab is active. On the left, a sidebar contains 'Policy' and 'Audit' links. The main content area features a table with the following data:

NAME	SEVERITY	DESCRIPTION
Inform CEO	100	

Below the table, there is a form for adding or editing a category. The form includes the following fields:

- Name*: Inform CEO
- Severity*: 100
- Description*: (empty text area)

At the bottom right of the form, there are 'Save' and 'Cancel' buttons. The 'Add' button in the table's toolbar and the 'Save' button in the form are highlighted with red boxes.

On Rules, already created Categories will be visible and selectable. If you click on the Add icon, you'll be able to create a new Category while you are in Rule Add/Edit section.

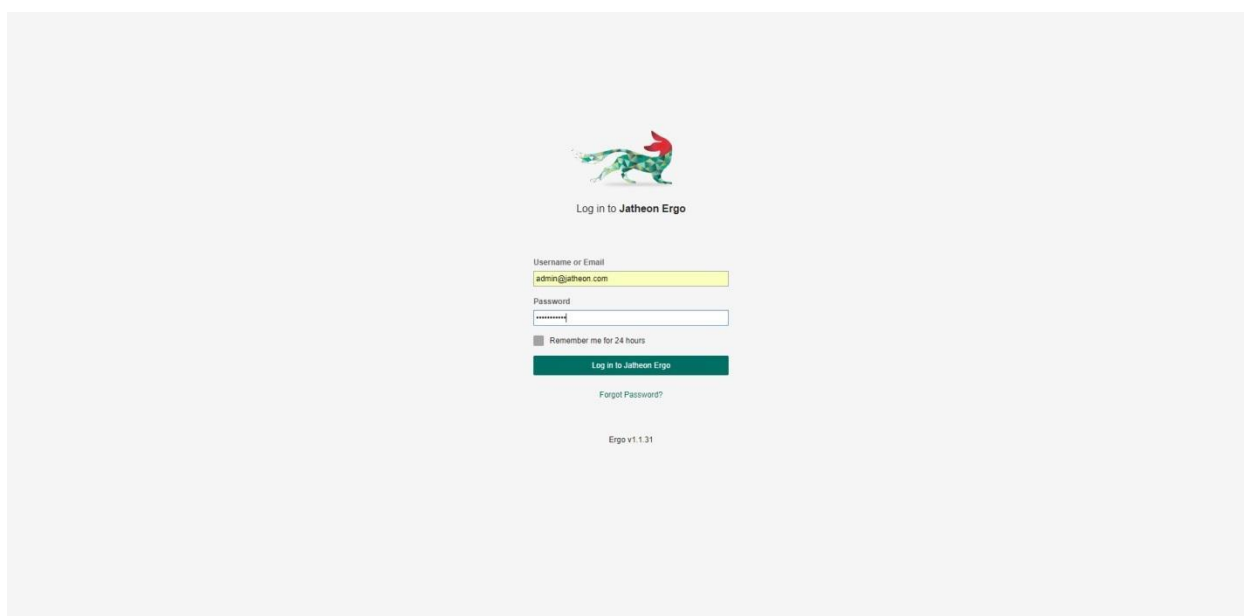
4. Audit

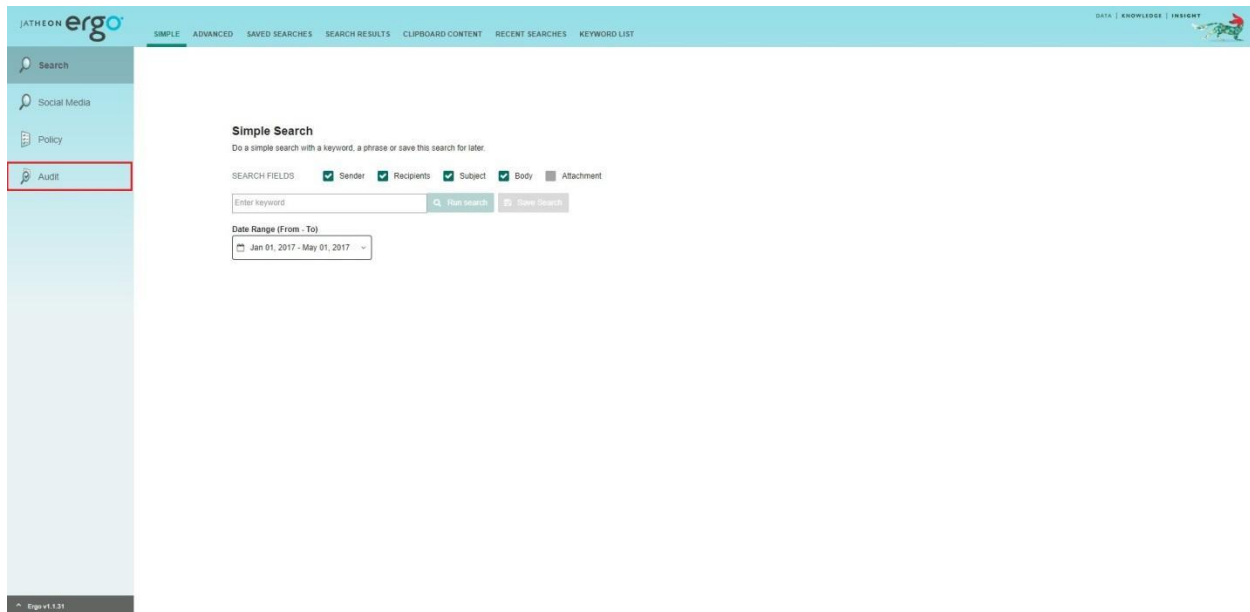
Introduction

The Audit section is very useful for viewing the entire history and all activities for all users on the Jatheon system. This section allows you to track when something was created, edited, deleted or what was searched, what emails were viewed etc. This applies to both actions in the Search menu and actions in the Admin menu. In other words, you'll be able to track the addition, editing and deletion of every item.

Audit Location

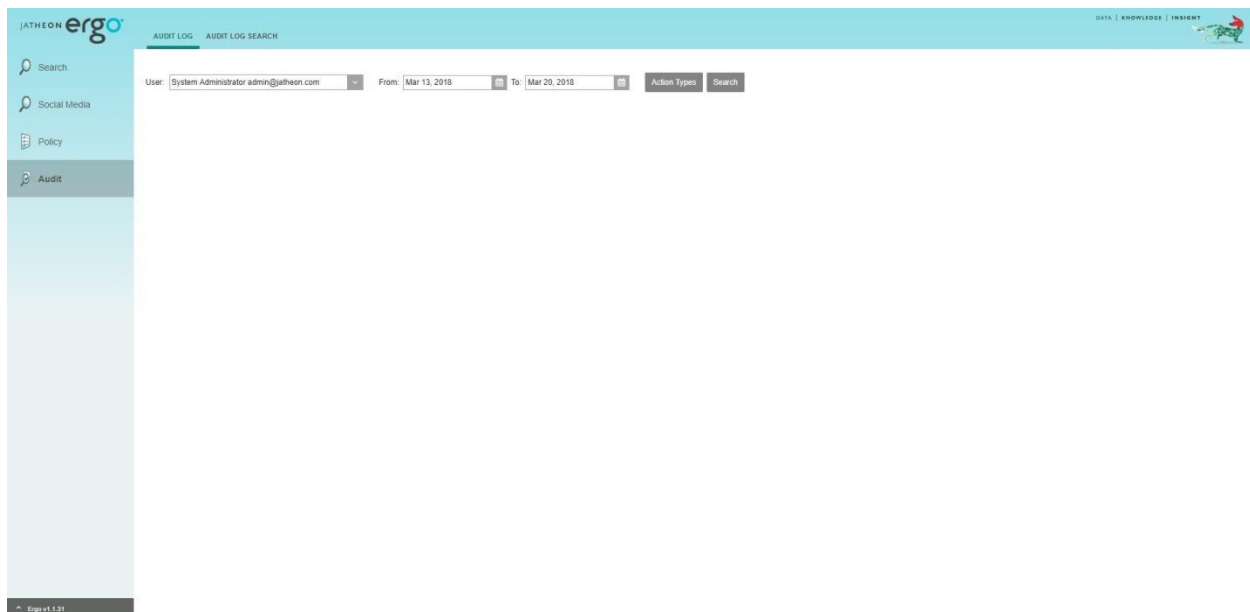
After logging in, you'll see the Simple Search section of the system (the default view after login). Click on the Audit main section on the left.





The screenshot shows the 'Simple Search' interface in the JATHEON ergo application. The left sidebar has a red box around the 'Audit' icon. The main content area is titled 'Simple Search' and includes a sub-header 'Do a simple search with a keyword, a phrase or save this search for later.' Below this, there are search fields for 'Sender', 'Recipients', 'Subject', 'Body', and 'Attachment'. A text input field labeled 'Enter keyword' is present, along with 'Run search' and 'Save Search' buttons. A 'Date Range (From - To)' dropdown is set to 'Jan 01, 2017 - May 01, 2017'. The top navigation bar includes links for 'SIMPLE', 'ADVANCED', 'SAVED SEARCHES', 'SEARCH RESULTS', 'CLIPBOARD CONTENT', 'RECENT SEARCHES', and 'KEYWORD LIST'. The bottom status bar shows 'Ergo v1.1.31'.

This is the default view of the Audit section:



The screenshot shows the 'Audit Log Search' interface in the JATHEON ergo application. The left sidebar has the 'Audit' icon highlighted. The main content area is titled 'AUDIT LOG SEARCH' and includes a sub-header 'AUDIT LOG'. Below this, there are search fields for 'User', 'From', and 'To'. The 'User' field is set to 'System Administrator admin@jatheon.com'. The 'From' field is set to 'Mar 13, 2018' and the 'To' field is set to 'Mar 20, 2018'. There are 'Action Types' and 'Search' buttons. The top navigation bar includes links for 'AUDIT LOG' and 'AUDIT LOG SEARCH'. The bottom status bar shows 'Ergo v1.1.31'.

Audit Log

Options	Explanations
Types	If you click on this button, it will expand a list with all actions that can be viewed. You can select or deselect the ones you want by using check boxes on the left.
User	In this drop-down menu, you'll be able to see the list of all users that exist in the Admin menu and view history for specific users.
Dates/Calendar	The Audit Log will display only results within the date range you selected. By default, it is a week back from current day.
Search	The Audit Log will display all activity/history after you have selected types, dates and user.

☐ Search Actions

☒ MAIL VIEWED
☒ COMMENT ADDED
☒ COMMENT REMOVED
☒ SEARCH SAVED
☒ QUICK SEARCH
☒ ADVANCED SEARCH
☒ ATTACHMENT DOWNLOADED
☒ ADDED TO CLIPBOARD
☒ REMOVED FROM CLIPBOARD
☒ ADDED TO POLICY
☒ REMOVED FROM POLICY
☒ EXPORT TO PDF
☒ RESTORE MAILs
☒ FORWARD MAILs
☒ EXPORT TO EML
☒ EXPORT TO PST

☐ User Actions

☒ USER LOGIN
☒ USER CHANGED PASSWORD
☒ USER LOGOUT
☒ USER CREATED
☒ USER MODIFIED
☒ USER DELETED

Department Actions

- ✓ DEPARTMENT CREATED
- ✓ DEPARTMENT MODIFIED
- ✓ DEPARTMENT DELETED

Group Actions

- ✓ GROUP CREATED
- ✓ GROUP MODIFIED
- ✓ GROUP DELETED

LDAP Actions

- ✓ LDAPCONNECTION CREATED
- ✓ LDAPCONNECTION MODIFIED
- ✓ LDAPCONNECTION DELETED
- ✓ LDAPSERVERMAPPING CREATED
- ✓ LDAPSERVERMAPPING MODIFIED
- ✓ LDAPSERVERMAPPING DELETED

Role Actions

- ✓ ROLE CREATED
- ✓ ROLE MODIFIED
- ✓ ROLE DELETED

Keywordlist Actions

- ✓ KEYWORDLIST CREATED
- ✓ KEYWORDLIST MODIFIED
- ✓ KEYWORDLIST DELETED

Message source List

- ✓ FOLDER SYNCHRONIZATION MODIFIED
- ✓ IMAPCONNECTION CREATED
- ✓ IMAPCONNECTION MODIFIED
- ✓ IMAPCONNECTION DELETED

Rule Actions

- ✓ RULECATEGORY CREATED
- ✓ RULECATEGORY MODIFIED
- ✓ RULECATEGORY DELETED
- ✓ RULE CREATED
- ✓ RULE MODIFIED
- ✓ RULE DELETED
- ✓ RULE HITS VIEWED
- ✓ LEGAL HOLD HITS VIEWED
- ✓ APPLY SAMPLE RATE BUTTON

Scheduler Audit

- SCHEDULED TASK CREATED
- SCHEDULED TASK MODIFIED
- SCHEDULE TASK DELETED

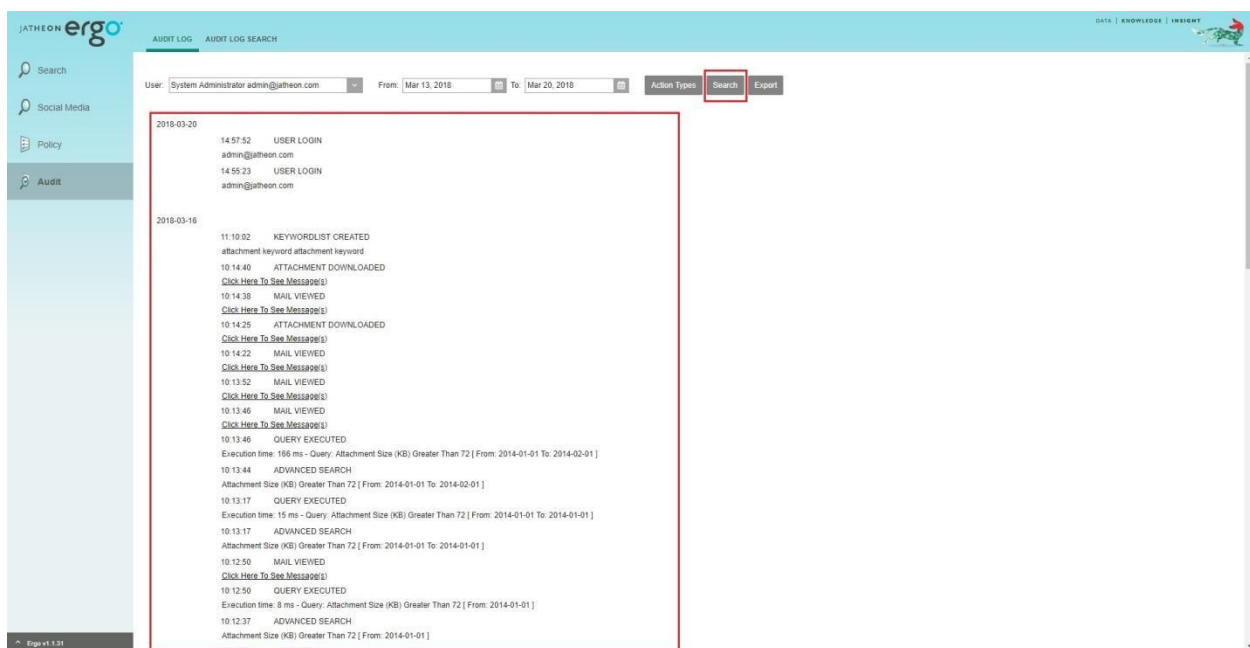
Sysetem Actions

- GENERAL CONFIGURATION MODIFIED
- PROXY SETUP MODIFIED
- SUPPORT_CHANNEL_INSTALLED
- SUPPORT_CHANNEL_UNINSTALLED

Social Actions

- SOCIAL MESSAGE VIEWED
- SOCIAL SEARCH
- SOCIAL EXPORT TO PDF
- SOCIAL FORWARD MAILS
- SOCIAL COMMENT ADDED
- SOCIAL COMMENT REMOVED
- SOCIAL SEARCH SAVED
- SOCIAL ADDED TO POLICY
- SOCIAL REMOVED FROM POLICY

After you click on the Search button, actions/history for the selected user will be displayed.



Actions will be broken by days. Some actions (such as viewed emails) will be clickable so you can immediately see the given email on the Audit Log search results tab. If you scroll to the bottom of the list, you can select the number of log items per page to display or use standard pagination. You can also export the Audit Log to a PDF document by clicking on the Export button.

Audit Log Search

It works the same way as the Audit Log. However, instead of searching for all actions performed by a specific user, you can use a keyword and track all actions regarding that keyword. On the search results list, you'll be able to see which user did what and where.

A screenshot of the JATHEON ergo web application's Audit Log Search interface. The interface has a light blue header with the "JATHEON ergo" logo on the left and "DATA | KNOWLEDGE | INSIGHT" on the right. A sidebar on the left contains icons for Search, Social Media, Policy, and Audit. The main content area has a tabbed interface with "AUDIT LOG" and "AUDIT LOG SEARCH" tabs; the "AUDIT LOG SEARCH" tab is selected and highlighted with a red box. Below the tabs, there is a search form with a "Keywords:" input field containing the text "admin", a "From:" date field set to "Mar 23, 2018", and a "To:" date field set to "Mar 23, 2018". To the right of these fields are buttons for "Action Types", "Search", and "Export". Below the search form, there is a "Page size:" dropdown set to "10" and a pagination control showing "1 / 1". A table of search results is displayed below, with the first row showing a date "2018-03-23", a time "17:19:01", a user "admin@jatheon.com", and an action "USER LOGIN" performed by "admin@jatheon.com". The footer of the page shows "Ergo v1.1.31".

About Jatheon

We founded Jatheon Technologies Inc. in 2004 to empower companies in their efforts to ensure email compliance and facilitate eDiscovery.

Today, we are leaders in the archiving industry, with **5+ billion processed messages** and unique on-premise and cloud archiving and governance solutions. We continue to raise the bar throughout the industry with our latest enterprise-grade **cCore** archiving appliances, a powerful archiving, retrieval and dynamic monitoring software and best-in class tech support, **Jatheon Care**. In 2017, we built **Jatheon CTRL** - a social media and mobile archiving add-on that smoothly integrates with our email archiving software.

It is our mission to ensure security and bring peace of mind to businesses, government agencies, educational, financial and healthcare institutions across the globe. We're headquartered in Toronto, but we serve clients worldwide through our network of global business partners. For more information, please visit www.jatheon.com.