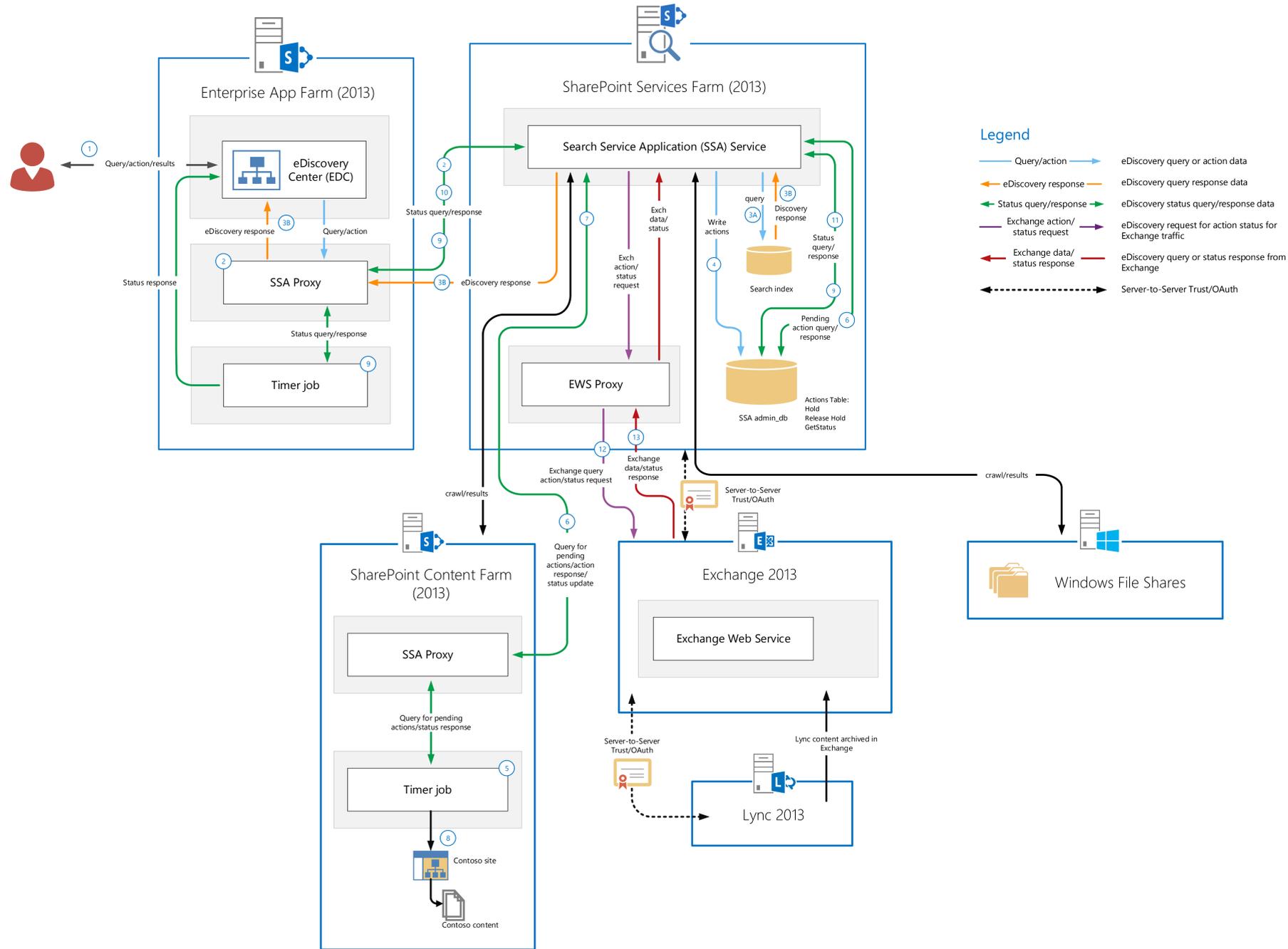


On-premises eDiscovery Flow

Across SharePoint, Exchange, Lync and file shares

Last Updated: 9/11/2013



eDiscovery Flow List

- 1 eDiscovery cases are created, managed, and used in the eDiscovery center (EDC). The EDC is a SharePoint 2013 site collection. This is where cases are defined, sources to be tracked are identified, queries are issued, query results are reviewed and holds on content are placed or removed.
- 2 The eDiscovery query or action, such as place a Hold, ReleaseHold, or GetStatus is relayed from the EDC to the Search Service Application proxy (SSA Proxy) in the Enterprise App Farm. The SSA proxy then relays the traffic to the Search Service Application (SSA) in the Services App Farm. In this example, the request is to place anything in the SharePoint Content Farm with "CONTOSO" in the file name on hold.
- 3A If the request is to query a case, the SSA consults the search index.
- 3B The eDiscovery query result set is returned to the user through the EDC.
- 4 If the request is an action, such as place a Hold or ReleaseHold, that action is written to the Actions_Table in the SSA Administrative database. In this example, a hold request for anything in the SharePoint Content Farm with "CONTOSO" is written to the Actions_Table.
- 5 At regular intervals the Content Farm eDiscovery in-place hold timer job wakes up and generates a request for pending actions and sends status updates through the SSA proxy to the Search Service Application.
- 6 The query for pending actions is relayed to the central SSA, which consults the Action_Table for any pending actions for the Content Farm. The Content Farm in-place hold timer job also sends status updates for objects and actions it has received, which are written to the ActionsTable.
- 7 The hold request for any content with "CONTOSO" in the name in the SharePoint 2013 Content Farm is sent by the SSA to the eDiscovery in-place hold timer job in the Content Farm.
- 8 The eDiscovery in-place hold timer job places the "CONTOSO Site" and "CONTOSO content" on hold.
- 9 The eDiscovery in-place hold timer job periodically runs in the Enterprise App Farm to check status of discovery actions and update the status.
- 10 The status query is relayed through the Enterprise App Farm SSA proxy to the SharePoint Services Farm SSA.
- 11 The SSA retrieves the status from the Actions table and returns it to the timer job in the Enterprise App Farm, which pushes the status updates to the EDC.
- 12 When the eDiscovery user is searching (or performing an action) for Exchange sources, such as a mailbox or archived Lync content, the central SSA uses EWS proxy to query Exchange Web Services. Exchange has its own search and eDiscovery infrastructure and manages all eDiscovery calls internally.
- 13 Exchange Web Services will respond to SSA with eDiscovery search results or a response to a status request for a query-based hold, which in turn gets relayed to the EDC.

Prerequisites

- SharePoint Enterprise Search must be configured and all content sources (SharePoint and Windows file shares) are being crawled and are in the index.
- Server-to-Server trust and authentication must be configured between the SharePoint Services Farm and Exchange and also between Exchange and Lync.