

Agenda / Flow

Time	Topic	Speaker
0:00- 2:00	Intro	Katie
2:00-4:00	What are we seeing from Cx?	Stef
4:00-7:00	Identifying Teams content	Stef
7:00-11:00	Collecting Teams content	Nick
11:00-17:00	Reviewing Teams content	Stef
17:00-27:00	Demo	Nick
27:00-29:00	Closing	Katie
29:00-45:00	Q&A	Answers in chat



How to use Advanced eDiscovery with Microsoft Teams

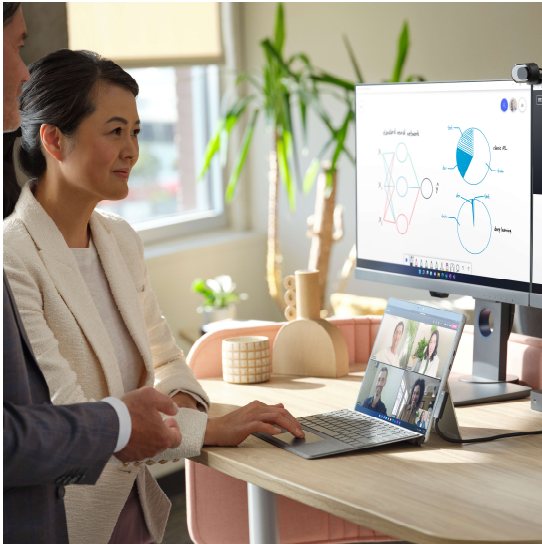
Katie Anderson, Sr Product Marketing Manager
Stefanie Bier, Sr Program Manager
Nick Robinson, Principal Program Manager



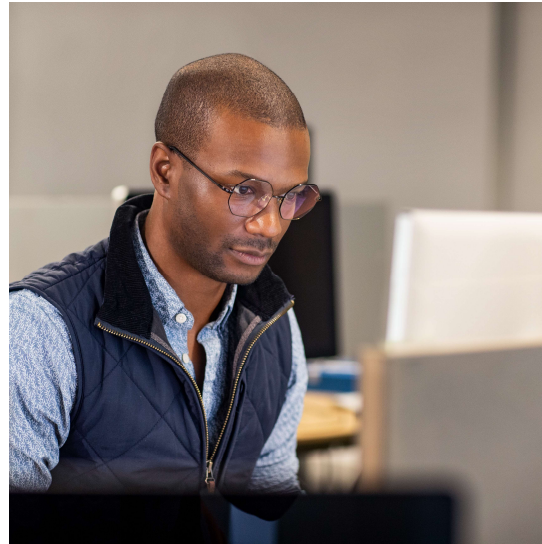
Agenda

-
- What we are hearing re: eDiscovery and Microsoft Teams
 - Using Adv eDiscovery for Microsoft Teams
 - Identifying
 - Collecting
 - Reviewing
 - Demo
 - Q&A

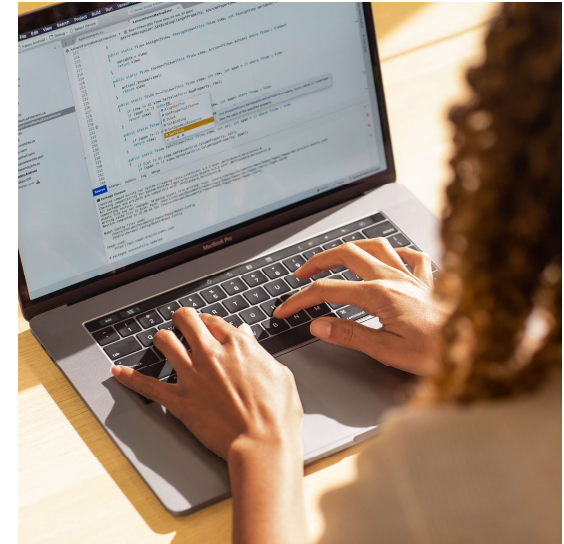
What customers are saying



“Teams enables true collaboration, from document sharing to workflow automation to integration with 3rd party apps. Investigations can be a formidable task without an understanding of where data is stored.”



“Our users are now using Teams more than email as their go-to communication tool – that means our eDiscovery processes and tools have to quickly adapt”



“We have seen such an exponential growth of data created in Teams that understanding what is relevant is challenging”

eDiscovery ask:

How do I identify the location of Teams content ?

with Advanced eDiscovery:

Custodial workflows help you identify Team membership

4 Main Types of Teams messages

Teams 1:1 Chats

Chat messages, posts, and attachments shared in a Teams conversation between two people

Teams Group Chats

Chat messages, posts, and attachments shared in a Teams conversation between three or more people

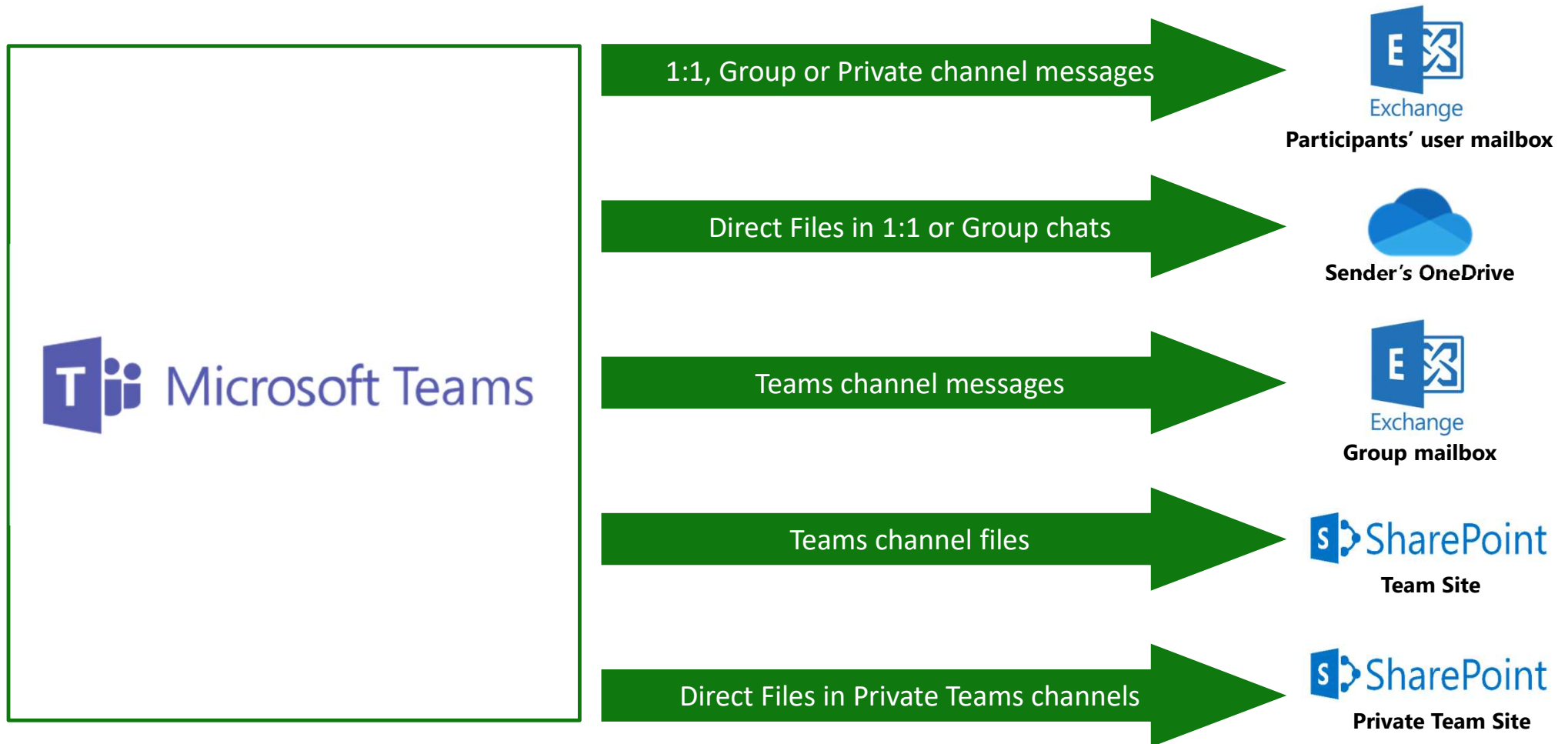
Teams Channels

Chat messages, posts, replies, and attachments shared in a Teams channel

Private Teams Channels

Message posts, replies, and attachments shared in a private Teams channel

Where is your Microsoft Teams data stored?



Identifying Teams 1:1 and group chats

Contoso Electronics Microsoft 365 compliance

Advanced eDiscovery > Cases > JW_LargeCase_10

Overview **Data sources** Collections

Start your case by setting up people as custodians to

Add data source Refresh

Name	Source type
Adele Vance	Custodian
Johanna Lorenz	Custodian
Debra Berger	Custodian
Irvin Sayers	Custodian
Allan Deyoung	Custodian
Lee Gu	Custodian

New custodian

- Identify custodian**
- Hold settings
- Review

Select custodian

Identify new custodians from your organization's active directory

AW Alex Wilber Please type minimum 3 characters to get the mailbox list.

Expand each custodian to view and add locations.

Custodian	Count	Clear	Edit
Alex Wilber			
Mailboxes	1/1 (Default)	Clear	Edit
OneDrives	1/1 (Default)	Clear	Edit
Exchange	0		Edit
SharePoint	0		Edit
Teams	12		Edit
Yammer	0		Edit

Next Cancel

Identifying Teams based on custodial membership

The screenshot displays the Microsoft 365 compliance interface for 'Contoso Electronics'. The main window is titled 'New custodian' and shows a progress bar with three steps: 'Identify custodian' (selected), 'Hold settings', and 'Review'. Below the progress bar, a table lists existing custodians:

Name	Source type
Adele Vance	Custodian
Johanna Lorenz	Custodian
Debra Berger	Custodian
Irvin Sayers	Custodian
Allan Deyoung	Custodian
Lee Gu	Custodian

The 'Select custodian' section shows a search for 'Alex Wilber' and a list of services to expand: Mailboxes, OneDrives, Exchange, SharePoint, Teams, and Yammer. A 'Next' button is at the bottom.

An 'Edit assigned Teams locations' dialog is open on the right, featuring a search bar and a list of 12 items:

- U.S. Sales (Site)
- U.S. Sales (Mailbox)
- Sales and Marketing (Site)
- Sales and Marketing (Mailbox)
- Sales Planning (Site)
- Sales Planning (Mailbox)
- Retail (Site)
- Retail (Mailbox)
- Mark 8 Project Team (Site)
- Mark 8 Project Team (Mailbox)
- Digital Initiative Public Relations (Site)
- Digital Initiative Public Relations (Mailbox)

The dialog includes 'Add' and 'Cancel' buttons at the bottom and a 'Close' button in the top right corner.

Preserving Teams locations

Contoso Electronics Microsoft 365 compliance

Advanced eDiscovery > Cases > JW_LargeCase_10

Overview **Data sources** Collections

Start your case by setting up people as custodians to

Add data source Refresh

Name	Source type
Adele Vance	Custodian
Johanna Lorenz	Custodian
Debra Berger	Custodian
Irvin Sayers	Custodian
Allan Deyoung	Custodian
Lee Gu	Custodian

New custodian

- Identify custodian
- Hold settings**
- Review

Hold settings

Choose which of your new custodians to place on hold.

Name	Hold
Alex Wilber	<input checked="" type="checkbox"/>

Back Next Cancel

eDiscovery ask:

How do I **collect** Teams content ?

with Advanced eDiscovery:

Conduct targeted collections of Teams content

Quickly search for and collect Teams content

By custodian or location

Using queries and conditions

Including cloud attachments shared

The screenshot displays the Microsoft 365 compliance interface. The breadcrumb navigation shows 'Advanced eDiscovery > Cases > Webinar investigation'. The 'Collections' tab is active, showing a table of collections:

Name ↓	Status
Megan content	Estimated
Irvin content	Estimated
All Teams messages - committed	Adding to collection
All Teams messages	Estimated

The 'Irvin content' collection is selected, showing search statistics. The 'Search statistics' tab is active, displaying the following information:

- Estimated items by location:** 14 items (Exchange (14))
- Estimated locations with hits:** 1 location(s) (Exchange (1))
- Data volume by location (KB):** 495.3 KB (Exchange (495.3 KB))

The interface also includes a 'Condition report' section and 'Top locations' at the bottom. The top right corner shows the user's name 'MC' and a refresh icon.

Collect by Custodian (employee) or Team

The screenshot shows the 'New collection' wizard in the Microsoft 365 compliance center. The 'Additional locations' step is active, where users can select data sources to include in the collection. The 'Exchange mailboxes' section is expanded, showing a search for 'sales' and a list of results. The 'Sales Team' mailbox is selected.

Additional locations

Choose additional locations to search. An additional location is a data source that was not included in the previous page. Note: these additional locations will not include advanced indexing capabilities. For more information, see [Additional locations for search](#).

Status	Location	Included
<input checked="" type="checkbox"/>	Exchange mailboxes	All mailboxes
	Microsoft 365 Groups	Teams
	Yammer user messages	
<input type="checkbox"/>	SharePoint sites	Choose user
	OneDrive sites	Microsoft 365 Group Sites
	Yammer Networks	Team Sites
<input type="checkbox"/>	Exchange public folders	

Exchange mailboxes

Please type minimum 3 characters to get the mailbox list.

sales

1 selected

Name	Email address
<input checked="" type="checkbox"/> Sales Team	SalesTeam@M365x4975...
<input type="checkbox"/> Sales Best Practices	salesbestpractices@M36...
<input type="checkbox"/> Sales and Marketing	SalesAndMarketing@M3...
<input type="checkbox"/> Sales Planning	SalesPlanning@M365x4...

Back Next Done Cancel

Target Teams content with conditions & queries

Contoso Electronics Microsoft 365 compliance

New collection

- Name and description
- Custodial data sources
- Non-custodial data sources
- Additional locations
- Conditions**
- Save draft or collect
- Review your collection

Define your collection conditions

These are the search conditions that will apply to the custodial and non-custodial data sources you identified in earlier steps and will populate your collection.

Enter keywords or use the keyword list. You can also add conditions to narrow your results. [Learn more](#)

Query language-country/region: None

Condition card builder

KQL editor

Keywords

bazooka

Show keyword list

AND

Message kind

Equals any of

microsoftteams

AND

Date

Between

2021-10-04 2021-11-29

+ Add condition

Back Next Cancel

Get estimates before committing collection

The screenshot displays the Microsoft 365 compliance interface for 'Contoso Electronics'. The left sidebar lists various compliance tools, with 'eDiscovery' selected. The main area shows the 'Advanced eDiscovery' console for a 'Webinar investigation' case. Under the 'Collections' tab, a table lists several collections, with 'Teams content' selected. The right-hand pane provides a detailed view of the 'Teams content' collection, including a summary, search statistics, and a condition report.

Teams content Updated 11/29/2021, 2:14:59 PM

Estimated

This is the packaged summary of your collection. You can use this tool to review collection settings and statistics as well as to export reports about the collection for use outside of eDiscovery.

Summary | Data sources | Search statistics

Collection estimates

Estimated items by location
219 items

Estimated items by location: Exchange (219)

Estimated locations with hits
15 location(s)

Estimated locations with hits: Exchange (15)

Data volume by location (MB)
6 MB

Data volume by location: Exchange (6 MB)

Condition report

Download your search condition report.

Location type	Part	Condition	Locations with hits	Items	Size (MB)
Exchange	Primary	(((received>=)04-Oct-2021	15	219	6.09

Actions | Review sample | Close

Include Cloud attachments relevant to your search

Contoso Electronics Microsoft 365 compliance

New collection

- Name and description
- Custodial data sources
- Non-custodial data sources
- Additional locations
- Conditions
- Save draft or collect**
- Review your collection

Save as draft or add to review set

Decide whether you want to save your collection as a draft or immediately collect items and add them to a review set. [Learn more](#)

Save collection as draft
Collection will be saved for further review and refinement, but results won't be committed to a review set. The draft will contain estimated collection results and a preview that you can review to validate the size and scope before committing to a review set.

Collect items and add to review set
Collection will immediately gather items and add them to a review set. You can configure additional settings below to refine your collection.

Add to new review set

Review set name

Add to existing review set

Teams review RS1

Additional collection settings

These collection parameters will only apply to new items that haven't been collected in this case. Options that are selected by default and disabled are assigned by the case format.

Collect contextual Teams and Yammer messages around your search results

Collect cloud attachments from items found in your search results

Collect all versions of SharePoint items (doing this can significantly increase the volume of items added to your review set)

Collection ingestion scale

Add all of collection to review set

Add only collection sample to review set. [Edit sample parameters](#)

Back Next Cancel

eDiscovery ask:

How do I review Teams content ?

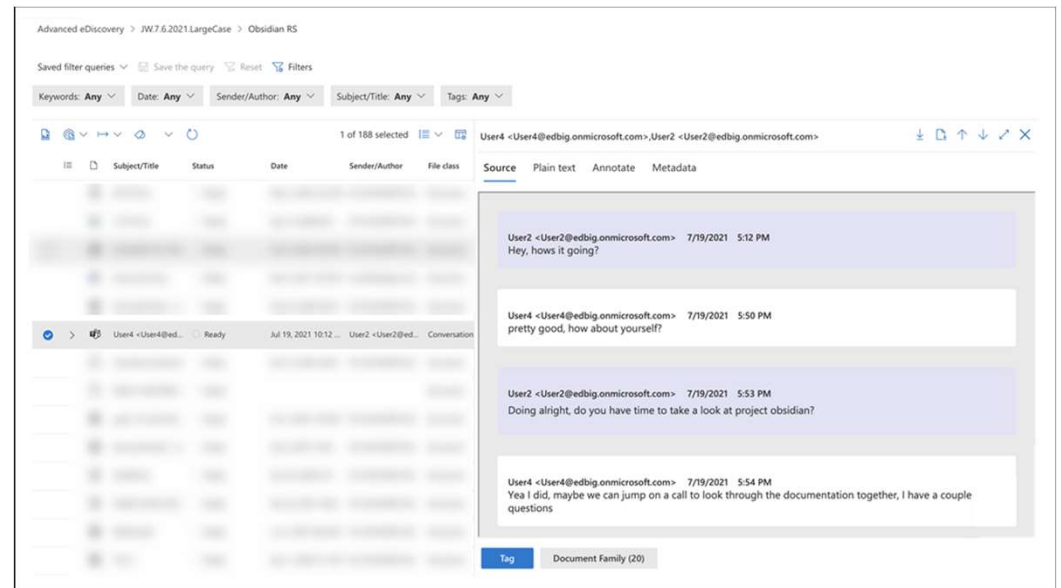
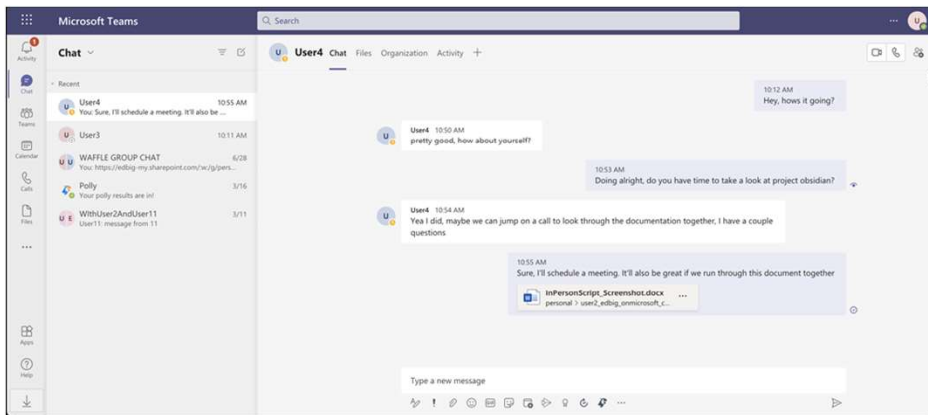
with Advanced eDiscovery:

Thread Teams content for better contextual review

Threaded messages for Teams 1:1 or group chats

What a Teams user sees:

What an eDiscovery manager sees with threaded transcript view in Advanced eDiscovery:



Reviewing 1:1 or group chats

The screenshot displays the Microsoft 365 compliance interface. At the top, the header shows 'Contoso Electronics' and 'Microsoft 365 compliance'. The breadcrumb navigation indicates the current view is 'Advanced eDiscovery > Cases > JW_LargeCase_09272021_2 > Custodian Teams Content'. Below this, there are filter options for 'Keywords: Any', 'Conversation Type: Any', 'Date: Any', 'File class: Any', 'Tags: Any', and 'Channel: Any'. A 'Customize columns' dropdown menu is open, showing options: 'None', 'Group family attachments', and 'Group Teams or Yammer conversations'. The main table lists chat messages with columns for 'Subject/Title', 'Status', 'Date', 'Custodian', and 'ID'. One message is selected, and its details are shown in a right-hand pane. The selected message is from 'Diego Siciliani <DiegoS@M365x178172.OnMicrosoft.com>' dated '2/2/2021 10:45 AM'. The message content includes a link to 'HR Leadership Team' and a mention of a 'New recruiting pipeline proposal'. Below the message, there is an attachment: 'Attachment: Recruiting Pipeline Proposal.pptx' with a URL to a SharePoint site. At the bottom of the pane, there are 'Tag' and 'Document Family (3)' buttons.

Subject/Title	Status	Date	Custodian	ID
/docProps/thumbnail.jpeg	Ready		AdeleV@M365x17...	0da6...
Introducing the Contoso M...	Ready		AdeleV@M365x17...	0e435b8257d6d0a...
DG-2000 Product Overview...	Ready		AlexW@M365x178...	0e6b01d7b25a4ffd...
HR Leadership Team, Recrui...	Tagged	Feb 2, 2021 2:45 AM	AdeleV@M365x17...	0ebb4b55952f860a...
/docProps/thumbnail.jpeg	Tagged		AdeleV@M365x17...	2bef3ce8086edb40...
PowerPoint Presentation	Tagged	Oct 18, 2018 2:22 P...	AdeleV@M365x17...	425381a8d002c9a8...
Recruiting Pipeline Proposa...	Tagged		AdeleV@M365x17...	98ee4fc7eceb74b8...
DG-2000 Product Pitch.pptx	Ready		AlexW@M365x178...	0f297490131b9c78...
HR pitch deck - stimulus fo...	Ready		AdeleV@M365x17...	0f994002c39fec3f1...
Marketing Deck v1.pptx	Ready		AdeleV@M365x17...	0ffd9493da19f7264...
SalesAndMarketing.png	Tagged		AlexW@M365x178...	101c42c0841773c9...
CR -227 Camera briefing.d...	Ready		AdeleV@M365x17...	105368eca002e2ef...
CR -227 Camera briefing.d...	Tagged		AdeleV@M365x17...	117fa47f233b77e...
Operations Analytics.pbix	Ready	Nov 2, 2017 8:07 AM	AdeleV@M365x17...	11838300c6881b10...

Diego Siciliani <DiegoS@M365x178172.OnMicrosoft.com> 2/2/2021 10:45 AM
[HR Leadership Team](#) New recruiting pipeline proposal is ready for feedback at the mtg today. Posting now if you guys wanna review beforehand.

Attachment: Recruiting Pipeline Proposal.pptx
<https://M365x178172.sharepoint.com/sites/HRLeadershipTeam/Shared Documents/Recruitment/Recruiting Pipeline Proposal.pptx>

Tag Document Family (3)

Reviewing Teams Channel posts

Contoso Electronics Microsoft 365 compliance

Advanced eDiscovery > Cases > JW_LargeCase_09272021_2 > Custodian Teams Content

Saved filter queries Save the query Reset Filters

Family ID: 1c1ea614b5528153c358b9e48487d51947520...

5 items


Subject/Title	Status	Date	Custodian	ID
Mark 8 Project Team, Design	Ready	Jan 21, 2021 6:11 PM	AdeleV@M365x17...	1c1ea614b5528153...
XT1050 Marketing Collater...	Tagged		AdeleV@M365x17...	3b88330b98811fff2...
XT1050 Marketing Collater...	Tagged		AdeleV@M365x17...	51e645c52eeea037...
X1050 Marketing Collateral ...	Tagged	Aug 2, 2017 9:45 AM	AdeleV@M365x17...	765d96f4e45cf2ba...
XT1050 Marketing Collater...	Tagged		AdeleV@M365x17...	baed5cf2523916d...

Mark 8 Project Team, Design

Source Plain text Annotate Metadata

Megan Bowen <MeganB@M365x178172.OnMicrosoft.com> 1/22/2021 2:11 AM
Isaiah Langer , way to go on the mockups!

Isaiah Langer <IsaiahL@M365x178172.OnMicrosoft.com> 1/22/2021 2:11 AM



Tag Document Family (4)

Reviewing Cloud Attachments

The screenshot displays the Microsoft 365 compliance interface. The top navigation bar shows 'Contoso Electronics' and 'Microsoft 365 compliance'. The breadcrumb trail indicates the current location: 'Advanced eDiscovery > Cases > JW_LargeCase_09272021_2 > Custodian Teams Content'. Below this, there are options for 'Saved filter queries', 'Save the query', 'Reset', and 'Filters'. A search bar shows a 'Family ID: 1c1ea614b5528153c358b9e48487d51947520...'. The main content area features a table with 5 items, each representing a cloud attachment. The table columns are Subject/Title, Status, Date, Custodian, and ID. The first item is 'Mark 8 Project Team, Design' with a status of 'Ready' and a date of 'Jan 21, 2021 6:11 PM'. The subsequent four items are 'X1050 Marketing Collateral' documents, all with a status of 'Tagged' and dates ranging from August 2, 2017, to January 21, 2021. A preview pane on the right shows the first page of a Word document titled 'X1050 Marketing Collateral Timelines'. The document content includes the title 'X1050 MARKETING COLLATERAL TIMELINES' and a note: 'This is a working reference document for use by the project team. Please add or reply to comments where you have changes, queries, or action items. Not necessary to use track changes.' The preview pane also shows 'Page 1 of 8', '88%' zoom, and a 'Give Feedback to Microsoft' link. At the bottom of the preview pane, there is a 'Tag' button and a 'Document Family (4)' label.

Subject/Title	Status	Date	Custodian	ID
Mark 8 Project Team, Design	Ready	Jan 21, 2021 6:11 PM	AdeleV@M365x17...	1c1ea614b5528153...
X1050 Marketing Collateral...	Tagged		AdeleV@M365x17...	3b88330b98811fff2...
X1050 Marketing Collateral...	Tagged		AdeleV@M365x17...	51e645c52eeea037...
X1050 Marketing Collateral ...	Tagged	Aug 2, 2017 9:45 AM	AdeleV@M365x17...	765df96f4e45cf2ba...
X1050 Marketing Collateral...	Tagged		AdeleV@M365x17...	baed5cfc2523916d...

Filters for Teams conversations

Contoso Electronics Microsoft 365 compliance

Advanced eDiscovery > Cases > JW_LargeCase_09272021_2 > Custodian Teams Content

Saved filter queries Save the query Reset Filters

Keywords: Any Conversation Type: Channel Date: Any File class: Conversation Tags: Any Teams Channel: Mark 8 Project Team

Overview Analytics Actions Tag files Manage Refresh 5 items Group Customize columns

	Subject/Title	Status	Date	Custodian	ID
	Mark 8 Project Team, General	<input type="radio"/> Ready	Feb 1, 2021 1:46 PM	AdeleV@M365x178172.OnMicrosoft.com	5a1a1e0c77a26983...
	Mark 8 Project Team, General	<input type="radio"/> Ready	Feb 1, 2021 1:46 PM	AdeleV@M365x178172.OnMicrosoft.com	7d1e8d8064a1f14e...
<input type="radio"/>	Mark 8 Project Team, General	<input type="radio"/> Ready	Jan 21, 2021 6:00 PM	AdeleV@M365x178172.OnMicrosoft.com	88fb63e7e684f122...
	Mark 8 Project Team, General	<input type="radio"/> Ready	Feb 1, 2021 1:46 PM	AdeleV@M365x178172.OnMicrosoft.com	a3120c5fb4e320f2...
	Mark 8 Project Team, General	<input type="radio"/> Ready	Feb 1, 2021 1:46 PM	AdeleV@M365x178172.OnMicrosoft.com	c508f4df91b8b2f0c...

Demo

7 Best Practices for using Adv eDiscovery with MS Teams

1. Leverage the "New" Advanced eDiscovery case type
2. Understand where your Teams content is stored
3. Read comprehensive documentation at aka.ms/edisco
4. Place relevant locations on hold in order to capture edits and deleted messages
5. Evaluate Teams html transcripts and export format to ensure compatibility with any downstream processes
6. Subscribe to Microsoft 365 Roadmap & Message Center posts for updates to Teams and our M365 compliance solutions
7. Test, validate and submit feedback!

Slide 24

KA0 [@Stefanie Bier] [@Nick Robinson]
Katie Anderson, 2021-11-29T18:27:50.453

KA0 0 [@Nick Robinson] awesome updates
Katie Anderson, 2021-11-30T22:05:47.869

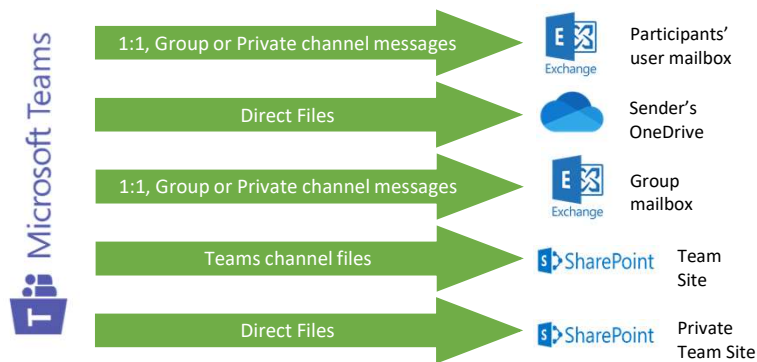
Using Advanced eDiscovery for Microsoft Teams

A Reference Guide

Best Practices for using Advanced eDiscovery for Microsoft Teams

1. Leverage the “New” Advanced eDiscovery case type
2. Understand where your Teams content is stored
3. Read comprehensive documentation at aka.ms/ediscovery
4. Place relevant locations on hold in order to capture edits and deleted messages
5. Evaluate Teams html transcripts and export format to ensure compatibility with any downstream processes
6. Subscribe to Microsoft 365 Roadmap & Message Center posts for updates to the Teams product as well as relevant compliance solutions
7. Test, validate and submit feedback!

Microsoft Teams data locations



Microsoft Advanced eDiscovery Resources

- “Become an Advanced eDiscovery Ninja”: <https://aka.ms/ediscoveryninja>
- Latest blog: <https://aka.ms/ediscoveryblog>
- Learn eDiscovery (Microsoft Learn Track): <https://aka.ms/learnediscovery>
- Microsoft Teams workflow for Advanced eDiscovery: <http://aka.ms/ediscoveryandteams>

Using Advanced eDiscovery for Microsoft Teams

A Reference Guide

		Teams 1:1 Chats	Teams Group Chats	Teams Channels	Private Teams Channels
Type	Content type	Chat messages, posts, and attachments shared in a Teams conversation between two people	Chat messages, posts, and attachments shared in a Teams conversation between three or more people	Chat messages, posts, replies, and attachments shared in a Teams channel	Message posts, replies, and attachments shared in a private Teams channel
	Identify	Location of chat messages / posts	Messages in 1:1 chats are stored in the Exchange Online mailbox of all chat participants	Messages in group chats are stored in the Exchange Online mailbox of all chat participants	All channel messages and posts are stored in the Exchange Online mailbox associated with the team
Collect		Location of files and attachments	Files shared in a 1:1 chat are stored in the OneDrive for Business account of the person who shared the file	Files shared in group chats are stored in the OneDrive for Business account of the person who shared the file	Files shared in a channel are stored in the SharePoint Online site associated with the team
	Review	Queries with search parameters	Messages posted 12 hours before and 12 hours after responsive items are grouped with the responsive item in a single transcript file	Messages posted 12 hours before and 12 hours after responsive items are grouped with the responsive item in a single transcript file	Each post that contains responsive items and all corresponding replies are grouped in a single transcript file
Queries with date ranges		Messages in a 24-hour window are grouped in a single transcript file	Messages in a 24-hour window are grouped in a single transcript file	Each post that contains responsive items and all corresponding replies are grouped in a single transcript file	Each post that contains responsive items and all corresponding replies are grouped in a single transcript file
Review	Grouping messages by family	Transcript + attachments + extracted items have the same FamilyId. Each transcript has a unique FamilyId	Transcript + attachments + extracted items have the same FamilyId. Each transcript has a unique FamilyId	Each post + all replies + attachments are saved to its own transcript. This transcript + all its attachments and extracted items share the same FamilyId	Each post + all replies + attachments are saved to its own transcript. This transcript + all its attachments and extracted items share the same FamilyId
	Grouping messages by conversation	All transcript files and family items within the same conversation share the same ConversationId, including all extracted items and attachments of all transcripts, transcripts for the same chat conversation, custodian copies of each transcript	All transcript files and family items within the same conversation share the same ConversationId, including all extracted items and attachments of all transcripts, transcripts for the same chat conversation, custodian copies of each transcript	Each post and its attachments and extracted items have a unique ConversationId	Each post and its attachments and extracted items have a unique ConversationId

Want to learn more about Advanced eDiscovery?

eDiscovery Resources

- “Become an Advanced eDiscovery Ninja” page: <https://aka.ms/ediscoveryninja>
- Homepage: <http://aka.ms/ediscovery>
- Latest blog: <https://aka.ms/ediscoveryblog>
- Learn eDiscovery (Microsoft Learn Track): <https://aka.ms/learnediscovery>

Great documentation on the Advanced eDiscovery workflow for Teams content : <https://aka.ms/ediscoveryandteams>

Thank you!

Please complete our survey!

<https://aka.ms/ediscoverysurvey3>

Become a Microsoft Adv eDiscovery Ninja:

<https://aka.ms/ediscoveryninja>