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Review: Discovery Attender From Sherpa Software

By Brett Burney

TechnoScore: 4.3
1 = Lowest Possible Score; 5 = Highest Possible Score
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INTRODUCTION

The world of eDiscovery is relentlessly evolving, but one constant remains -- everyone needs to search through email messages at some point in a litigation matter. The key is finding a tool that can do this quickly but accurately. Discovery Attender from Sherpa Software is a sturdy platform that enables you to search across electronic mailboxes, email archives, and folders of loose files.

Sherpa Software is well known for its email content management products for both Lotus Notes and Microsoft Exchange. The company's experience in helping IT administrators archive and manage burgeoning email collections lays a solid foundation for a tool to help the same folks search through email databases for relevant and/or dangerous messages.

Discovery Attender can search through both Lotus Notes and Microsoft Exchange environments. A good chunk of Sherpa Software's business comes from the corporate world, so it's important that Discovery Attender works with both of these major enterprise mail systems. For this review, I tested Discovery Attender for Microsoft Exchange, but not Lotus Notes.

WHAT'S IN AN EMAIL?

Everyone has an insatiable curiosity to see what's in an email collection. Most attorneys know by now that the really juicy stuff, the potential smoking gun, the needle in the haystack, is buried inside a large collection of email messages. Everyone instinctually wants to open up a key player's mailbox and start rummaging through to see what they can find.

It's common today to receive a PST file from a client or opposing party when you request relevant files to review. PST stands for "personal storage table" and is simply a format for making local copies of information from a Microsoft Exchange server or a Microsoft Outlook email client. PST files commonly hold email messages, but they can also include calendar items, contacts, tasks, and other information regularly found inside Microsoft Outlook.

Discovery Attender is a sturdy platform that enables you to search across electronic mailboxes, email archives, and folders of loose files.

PST files are easy to create from a Microsoft Exchange server or Microsoft Outlook, which is why they are a popular method for creating a copy or "archive" of a person's email. PST files can be created from a specific email folder, or it can contain several Gigabytes worth of information. Email PSTs can contain attachments and bundle hundreds or thousands of messages in one file for easy portability.

You can easily open PST files in Microsoft Outlook. And since many attorneys live and breathe inside Outlook, that's exactly where most people load a PST when they receive one. However, I do not recommended this method. It will work just fine, but it's never a good idea to mix client data with your own personal/work information.

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That's where a product like Discovery Attender can help. When you create a search within Discovery Attender, you can point the software to any number of PST files that have been copied on to a local hard drive or a network server. Discovery Attender does a much more thorough job of searching PST files than Outlook does. Once you've completed a search, you can export the results out to a separate PST file that you can then load into a litigation review platform like CT Summation.

TENDING TO DISCOVERY

Discovery Attender can be extremely helpful for law firms and their litigation support professionals, but it also provides a powerful search tool for corporate IT staff that need a trustworthy method of searching and exporting email collections to respond to requests made by outside counsel.

It is a small but powerful application, requiring only 30 MB of space on a hard drive. It can run on any computer with Windows 2000 or later, although it does require the Microsoft .Net Framework (which will be installed automatically if not detected).

Discovery Attender does not actively index anything for you. In other words, it's not running in the background taking up valuable processing power. It only runs when you launch it. On the other hand, no active indexing means that every new search has to start from scratch. Thus, it will take time to pore over every file and email message. My computer often cramped up a bit while a search was running so I couldn't do much other work during that time.

SEARCHING AN EMAIL COLLECTION

The Main Console of Discovery Attender is simple without any unnecessary frills. You're required to create a project right off the bat, and each search then becomes part of that project. The top part of the Main Console shows your various searches, and the bottom part lists the PST files or folder locations that you've searched.

Creating a new search launches the Search Wizard. This wizard is not as simple as some people would probably prefer, and I recommend going through it carefully. Don't just rush through the steps because you're anxious to see the results. Rather, take some

time to think about each question that the wizard asks. The Help file is also very useful in walking you through the process of creating a search.

One of the first steps in the Search Wizard is to choose what type of items that you would like the software to search. If you have access and the proper security permissions for a Microsoft Exchange server, you can check the boxes for Exchange Mailboxes and Exchange Public Folders. If you just have PST files, you can check that box. Lastly, you can point Discovery Attender at a collection of loose files on a hard drive or network server.

From the Results List, you can perform several helpful steps such as de-duplicating, exporting to a PST, or creating a report of the results.

Next you need to tell Discovery Attender the criteria you would like to search on. Obviously keywords are a top choice, but you also have the ability to filter files or email messages by date, size, addresses, and file types.

Once you finally answer all the questions in the Search Wizard, you'll need to wait for your computer to churn through the actual search process. You can choose whether Discovery Attender performs a "Basic Search," which is faster but does not search through encrypted or compressed files (i.e. Zip files); or you can have Discovery Attender do an "Advanced Search," which will search all file types and is powered by the dtSearch.

When the search finishes, Discovery Attender provides you with a nicely summarized report in the Results Details screen. You can view a list of every result, although you'll need the native application to open each file since a file viewer is not included. Not having file viewer was a problem for me because my first instinct was to double-click on a file in the Results List to open it. Each email message and file tried to launch its related application, and that got annoying quickly.

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I would like to see Sherpa add some kind of basic viewer for the files. I understand that the next version of Discovery Attender (version 3.0) will use dtSearch to convert native text and index results, which will be a welcome addition to the software.

From the Results List, you can perform several helpful steps such as de-duplicating, exporting to a PST, or creating a report of the results. The Results List indicates the location of every file, including the subfolder that an email message was located in (i.e. \Inbox\Client Correspondence).

SUPPORT AND COST

Sherpa Software offers trial downloads of all its products, which is the best way to evaluate Discovery Attender. Operating the software is fairly straightforward, but Sherpa offers Silver, Gold, and Platinum support tiers for customers that need some help.

Discovery Attender costs just under $2,000 per installation with volume discounts available.

CONCLUSION

I found Discovery Attender to be an extremely simple and effective tool for searching through a hefty stack of email. It wasn't overly complicated, and after a couple of searches, I became very comfortable with the logical steps involved in the Search Wizard.

Discovery Attender is a nice addition to the toolbelt of anyone who regularly needs to search through email to find messages relevant to a litigation matter.

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ABOUT THE AUTHOR

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