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## Searching Microsoft 365 with Purview

Prepared by Content Capture Services

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## 1. Log in to Microsoft Purview

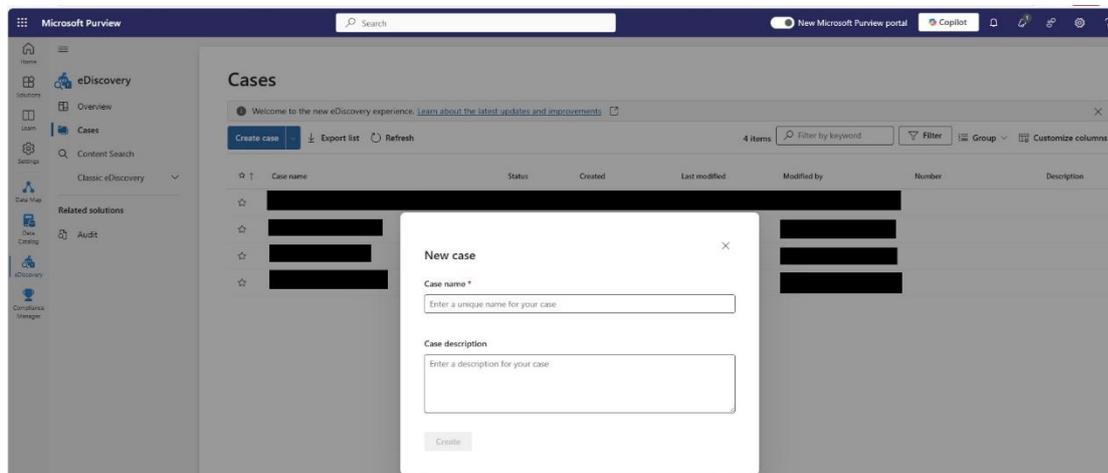
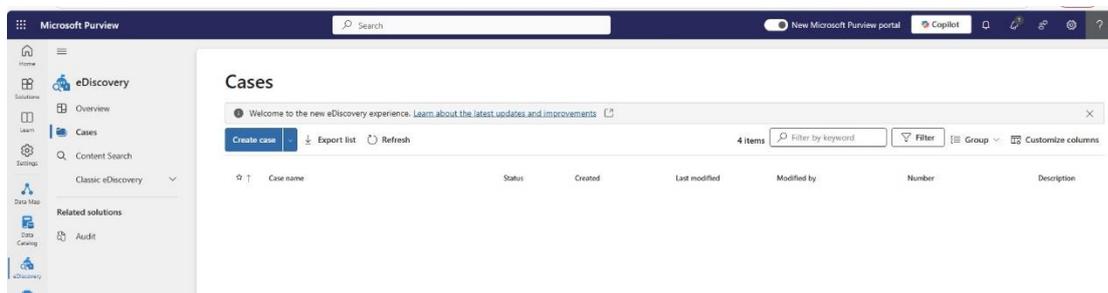
Visit <https://purview.microsoft.com> and sign in using your organization's Microsoft 365 credentials. Avoid using personal accounts.

## 2. Navigate to eDiscovery

From the Main Menu in center of the screen, click 'View all solutions'. Select 'eDiscovery', then click on 'Cases'.

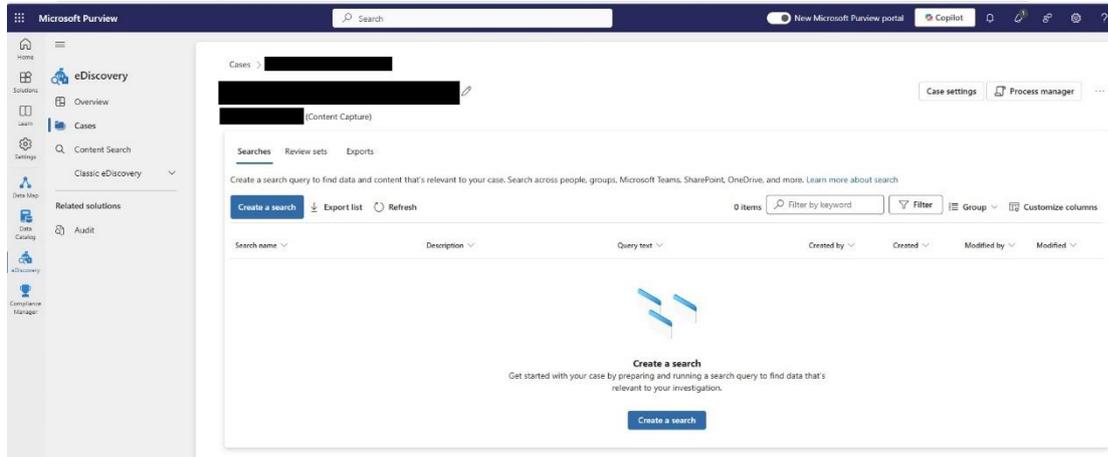
## 3. Create a New Case

Click 'Create Case'. Provide a unique Case Name and a brief Description (e.g., 'DSAR'). Click 'Create the case'.



#### 4. Create a Search Within the Case

Inside your case, click 'Create Search'. Use the same name and description as the case for consistency.

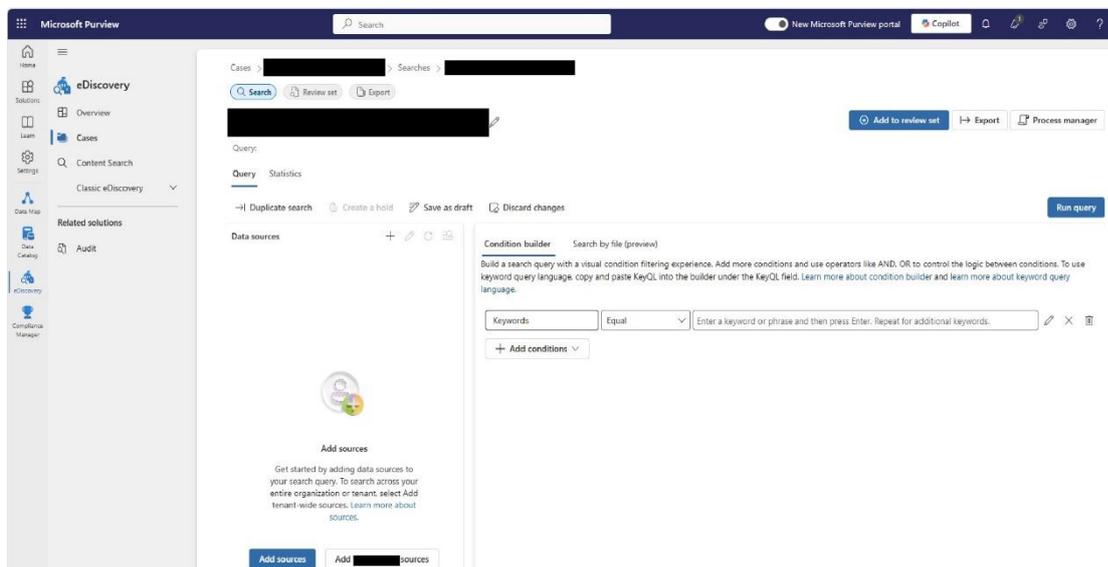


#### 5. Define Search Conditions

Choose your Data Sources: either looking at specific mail boxes (Add Sources Button) or add all mailboxes (Add Whole Company Sources Button)

On Condition Builder add search terms in 'Enter a keyword or phrase and then press Enter. Repeat for additional keywords'. For example: A persons full name press Enter and their full address press enter etc.

You can add search conditions to narrow a search and return a more refined set of results. Each condition adds a clause to the search query that is created. For example: look for information between certain dates.



## 6. Run the Search

Review the search settings (and edit if necessary). Then submit by pressing Run Query, make sure Statistics box is checked, then click the 'Run Query' at the bottom. The search may take some time.

## 7. Review Search Results

After the search is completed, review the Summary Report. Preview items or rerun the search if necessary.

The screenshot displays the Microsoft Purview eDiscovery interface. The left sidebar contains navigation options: Home, eDiscovery, Overview, Cases, Content Search, Classic eDiscovery, Related solutions, and Audit. The main content area shows a search query: "Query: ('parag maydeo')". Below the query, there are buttons for "Add to review set", "Export", and "Process manager". An orange arrow points to the "Export" button. The "Summary" section indicates the search was completed on 3 June 2023 at 14:23 PM. It provides the following statistics:

- Total matches:** 12 (12.5 MB)
- Locations:** 3 / 10756 (1 location had errors)
- Data sources:** 1 / 1

The "Search hit trends" section includes two charts:

- Top data sources:** A donut chart showing "All people and groups" with 12 items.
- Top errors:** A donut chart showing "The mailbox connection fa..." with 1 location.

## 8. Export the Search Results

Click 'Export'. Enter the same name and description used for the Case. Configure settings accordingly.

**Export**

We'll prepare your items for download. You can monitor the export's progress and download the results from the **Process manager** page. Larger exports might take longer to complete. [Learn more about exports](#)

**New pay-as-you-go billing model in effect.** Your organization may get billed for processing and storage of Non M365 AI interactions including Microsoft Copilot experiences, enterprise AI, and other AI apps. There are no charges for M365 Copilot interactions. [Learn more about pay-as-you-go billing](#)

Export name \*

Type a name for your export

Export description

Type a description for your export

**Select items to include in your export**

- Indexed items that match your search query
- Indexed items that match your search query and partially indexed items
- Partially indexed items

**OneDrive and SharePoint items**

Select document versions

Specify how many versions of SharePoint documents to collect.

Latest version only

**Select folder items**

Collect items inside subfolders of a matched folder.

- Only include items that match search query
- All items in folder (even if they don't match search query)

**Select items in lists and attachments**

Collect files attached to SharePoint lists and their child items.

- All items in SharePoint list if any item matches search query
- Include list attachments

**Messages and related items from mailboxes and Exchange online**

- Include Teams and Viva Engage conversations

Collect up to 12 hours of related conversations when a message matches a

**Export** **Cancel**

## 9. Monitor the Export Process

Click 'Process Manager'. Monitor until the export status shows 'Completed' this may take some time.

## 10. Download the Export

Ensure browser pop-ups are enabled. Click 'Download', save the file, and move it to your desired storage location.

The screenshot displays the Microsoft Purview interface. On the left, the 'Process manager' section shows a table of processes. The 'Export' process is highlighted, with a status of 'Completed'. Below this, the 'Export' details panel is open, showing the process name, status, and a list of export packages. The packages include 'Files 1', 'Report', 'Items.1.001', and 'PST1.001'. A 'Download' button is visible at the bottom of the panel.

Process type	Status	Export name	Review set name
Export	Completed	[REDACTED]	
Generate statistics	Completed		

Name	Process type
[REDACTED]	Export
Completed	Created
Duration	Created by
[REDACTED]	[REDACTED]
Status	Completed

Files	Size
Report [REDACTED]	402.74 KB
Items.1.001	42.09 MB
PST1.001	111.87 MB

## Final Notes

Ensure consistent naming across Case, Search, and Export for easier tracking. This process supports DSAR compliance by locating and exporting relevant subject data efficiently from Microsoft 365.

