

Searching with the Spirion Client

Scope: SO, CCC	Revision Date: 12/13/2018
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1. Introduction

Once you are familiar with the layout of the Spirion Client as documented in the [Introduction to the Spirion Client](#) document, you are ready to customize different searches in order to search the different locations that have the potential to contain identity data.

This document contains step-by-step instructions for performing popular searches:

- Searching your computer, your e-mail and a network share
- Searching removable media only
- Searching specific folders
- Searching E-mail only
- Searching Outlook Data Folders (.pst files) only (i.e. NOT your O365 email)
- Searching network shares

If you wish, we've also created a quick reference guide entitled [How To Perform a Search](#) that is much shorter than this document and instead of including step-by-step instructions for performing specific searches as found in this document, it includes a generic overview of how to perform searches.

View the complete [Spirion documentation](#) to find other useful documents when using Spirion as well as how to handle the results of the searches performed by referring to the [Handling Spirion Results](#) document.

2. Intended Audience

The intended audience for this procedure is:

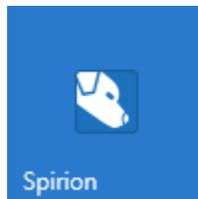
- System Office and CCC staff

3. Procedure

Launch the Spirion client

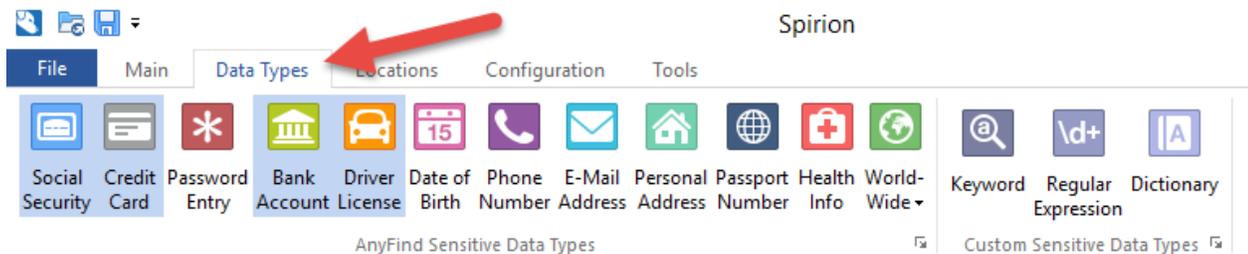
Open Spirion via the Spirion icon on your desktop or in the Start menu. We do not enable the encrypt feature, so data is not encrypted using your Spirion profile. Therefore, since profiles do not contain sensitive data and are only used to store client configurations, it does not need to be unique per user.

Your institution may have users use a standard, non-unique profile password (i.e. not unique per person like your NetID password). Verify with your institution on the profile password standard.



Select identity data types

1. Click on the **Data Types** tab:



2. By default, DCL3 data types (SSN, Credit and bank accounts and driver licenses) are enabled by policy, but if other identity data types were added and saved to your profile, decide which identity data types you are searching for and disable any others (i.e. password, date of birth) that you do not want to search for.

Configuring Searches

Use the following to guide you through the configuration of the appropriate settings in order to perform specific types of searches:

[Searching your computer, your e-mail and a network share](#)

[Searching removable media only](#)

[Searching specific folders](#)

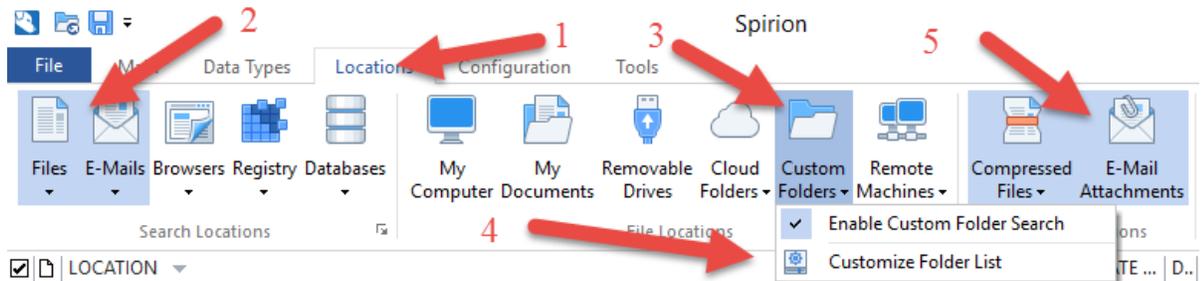
[Searching E-mail only](#)

[Searching Outlook Data Folders \(.pst files\) only \(i.e. NOT your O365 email\)](#)

[Searching network shares](#)

Searching your computer, your e-mail and a network share

1. Click on the **Locations** tab:

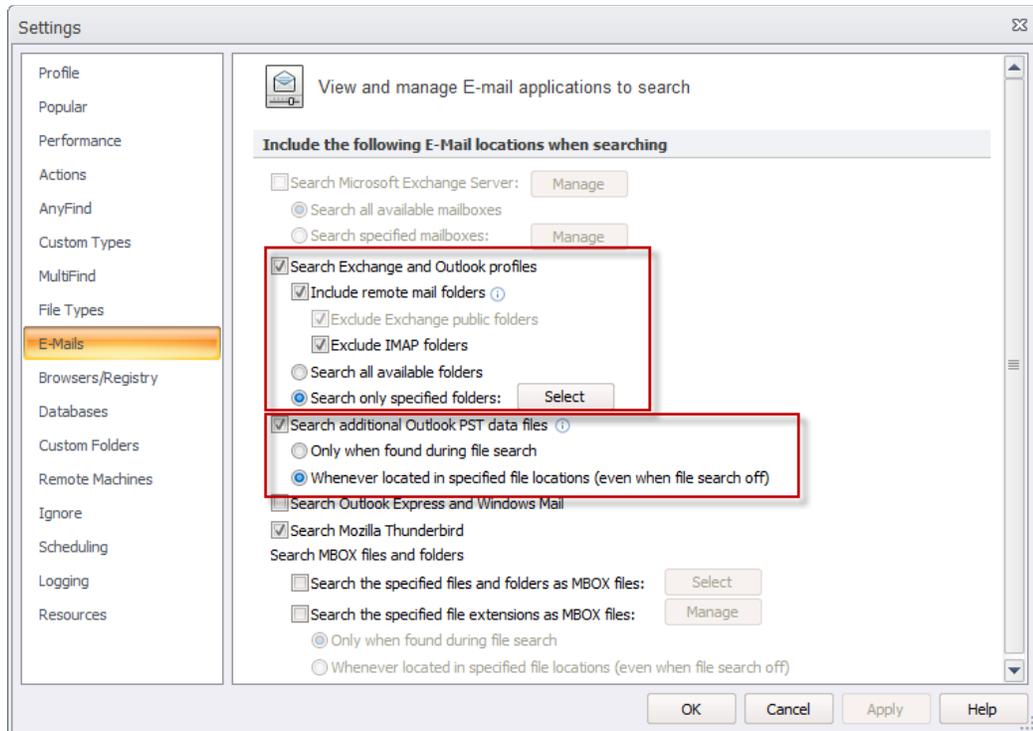


2. In the **Search Locations** section, enable both **Files** and **E-Mails**.

Note: Files larger than 127 Mb will not be searched (this restriction does not apply to Outlook Data files (*.pst)). Files that are skipped are logged in the client log file available from the Configuration – Logging tab.

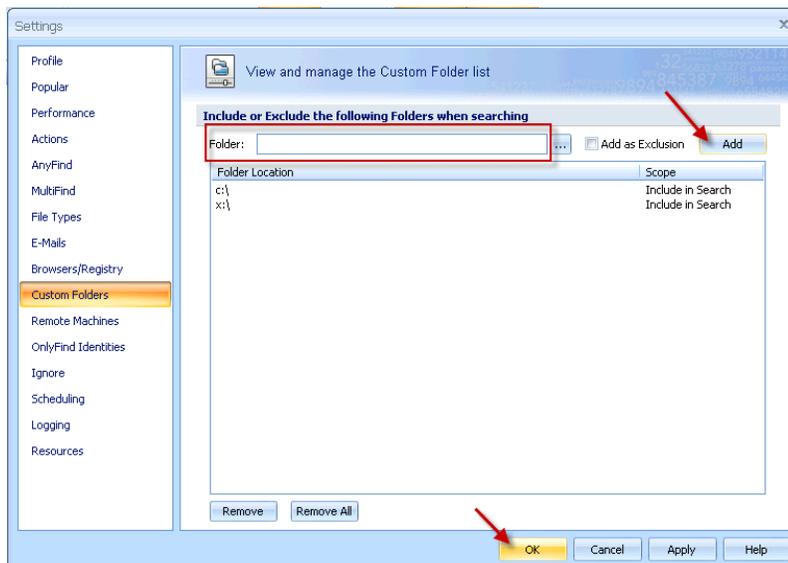
If you have customized your email search settings in the past (found by clicking the drop down arrow under E-mails and selecting Customize E-Mail Settings to view the Email settings), verify that it will “Search Exchange and Outlook profiles” and also search any Outlook Data files (*.pst) that are found.

If you find that you are performing an email search and mail is not being searched as you expect, please refer to our quick reference guide specifically for understanding [how mail is searched](#). It should answer your questions on how you have your client configured to search mail.



Click OK to close the settings window if you opened it to verify your email settings.

3. In the **File Locations** section, click the top part of the Custom Folders button to enable a custom folder search.
4. Then, customize the custom folder location by clicking the drop down arrow of the **Custom Folders** icon and select **Customize Folder List**:



The **Custom Folders** settings window will open.

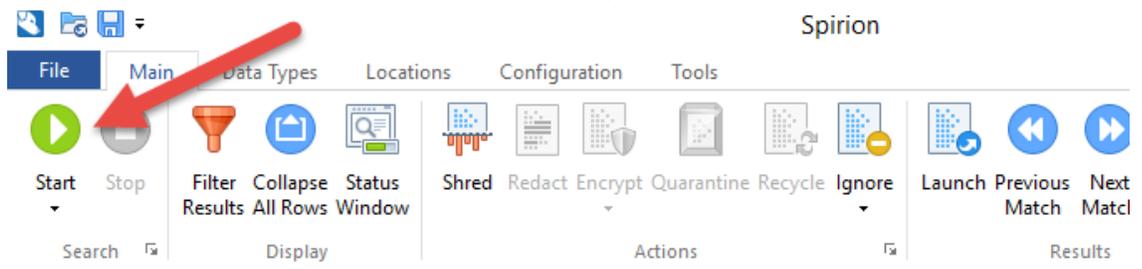
In the Folder field, enter C:\ and click the **Add** button.

In the Folder field, enter your network share and click the **Add** button.

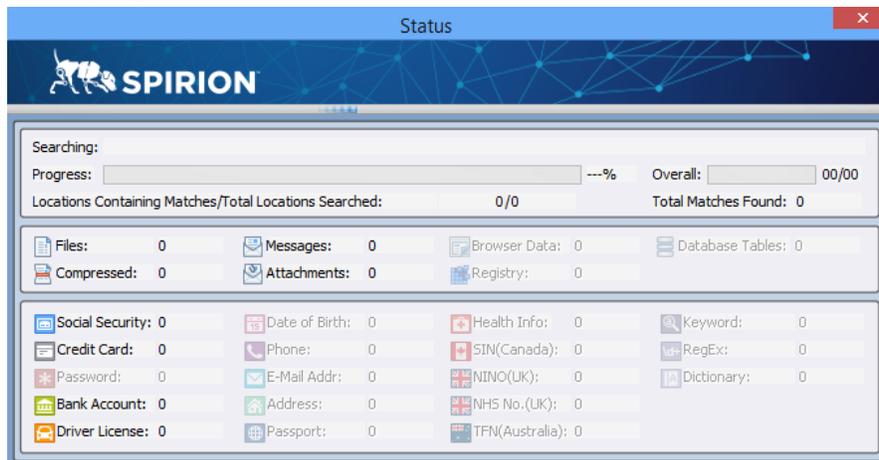
If you wish to exclude any sub folders, enter the folder name and check **Add as Exclusion** before clicking the **Add** button.

When you are done entering your locations, click the **OK** button.

5. In the Location **Options** section, enable both **Compressed Files** and **E-Mail Attachments**
6. Click on the **Main** tab. Click on the **Start** icon to begin the search:



7. Spirion begins scanning. You will see the [Spirion Status window](#) where you can track the search progress:

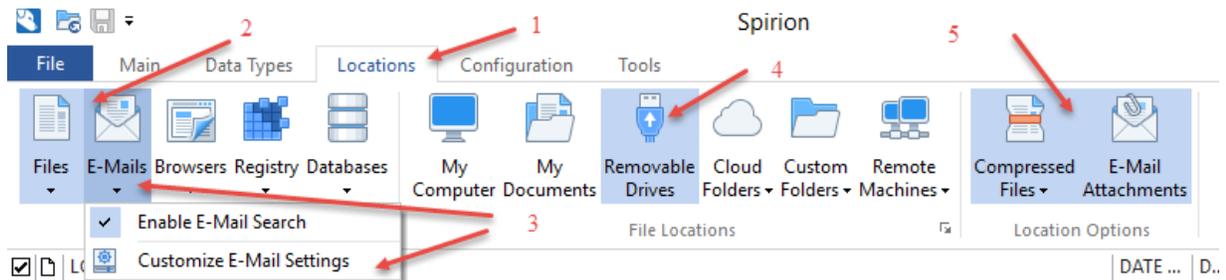


8. You will be presented with [the Search Summary Window](#) where you will need to decide what to do with the results of the search.

Searching removable media only

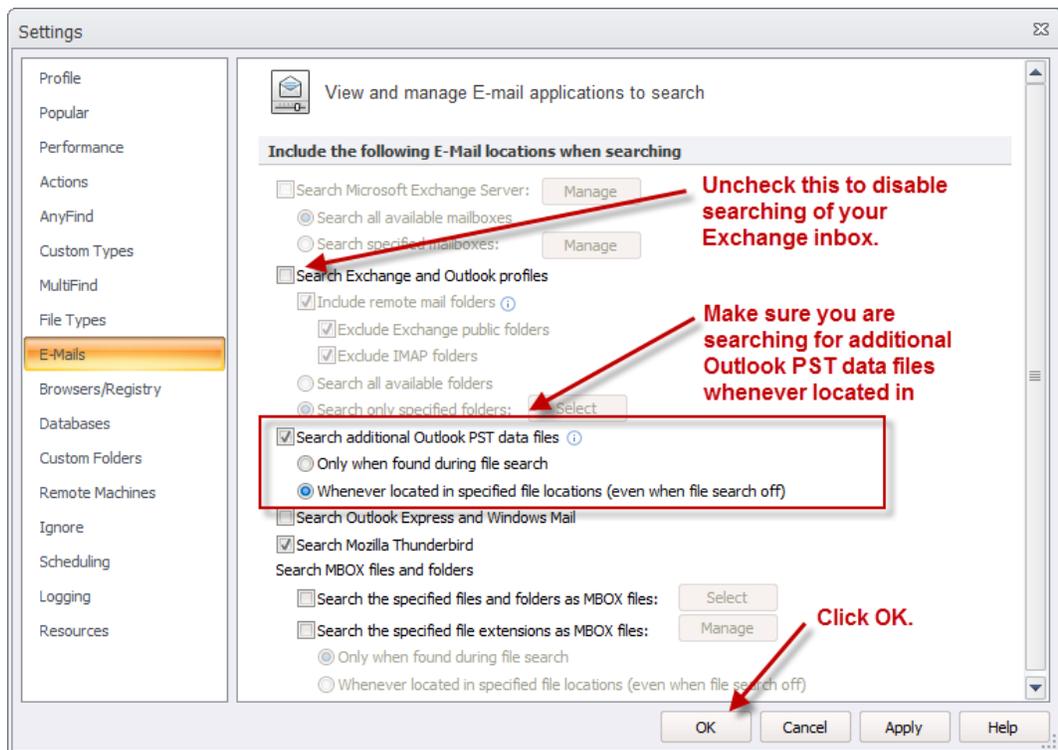
NOTE: Insert the media to be scanned (CD/DVD, USB Drive, etc.) before launching the Spirion client or else it won't recognize it as a location.

1. Click on the **Locations** tab:



A search has been completed. There are no results to display.

2. In the **Search Locations** section, make sure **Files and Emails** are selected.
3. Click the dropdown under Email to customize Email settings. You want to disable searching your e-mail and Outlook profile but still search any Outlook Data files (*.pst) found on the removable media:

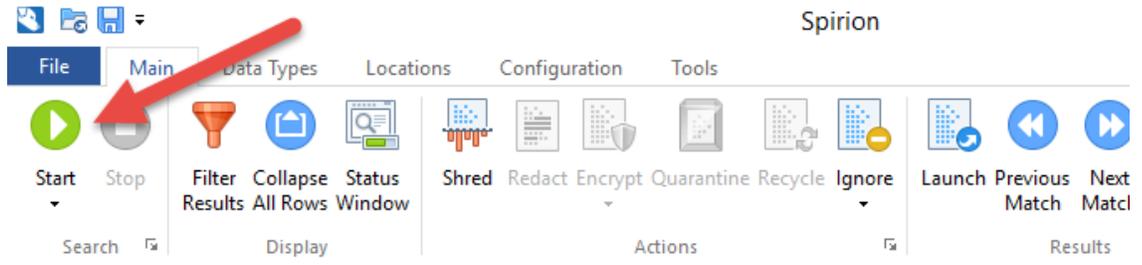


NOTE: It is important to re-enable “Search Exchange and Outlook profiles” after the search has completed so the next time you perform an email search, it will search your O365 mail. You should verify your email customization each time to verify it is set as expected.

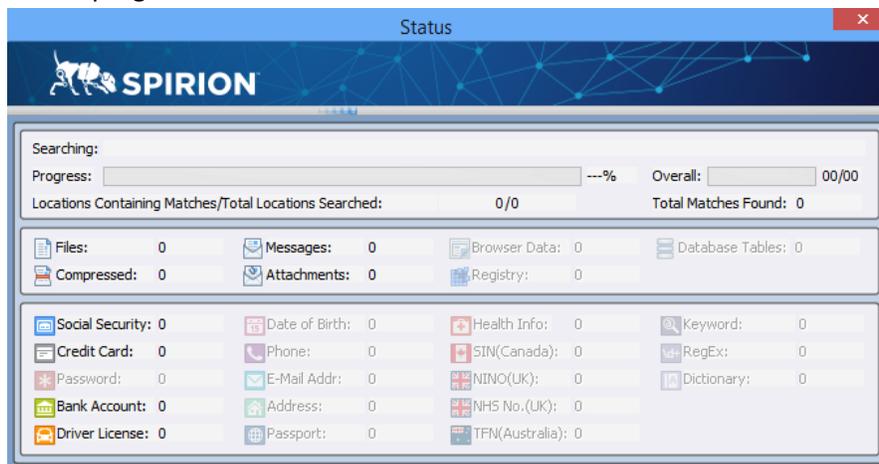
4. In the **File Locations** section select **Removable Drives**. If you hover over the Removable Drives button it will tell you what drives will be searched. If you don’t see your removable drive letter listed, it means it wasn’t connected prior to launching Spirion. You will need

to close the client, check that the appropriate drive letter is mapped to a drive and re-launch the client.

5. In the Location **Options** section select **Compressed Files** to include the contents of any compressed files (.zip, .rar, etc) as well as enabling searching of **email attachments**.
6. Click on the Main tab. Click on the **Start** icon to begin the search:



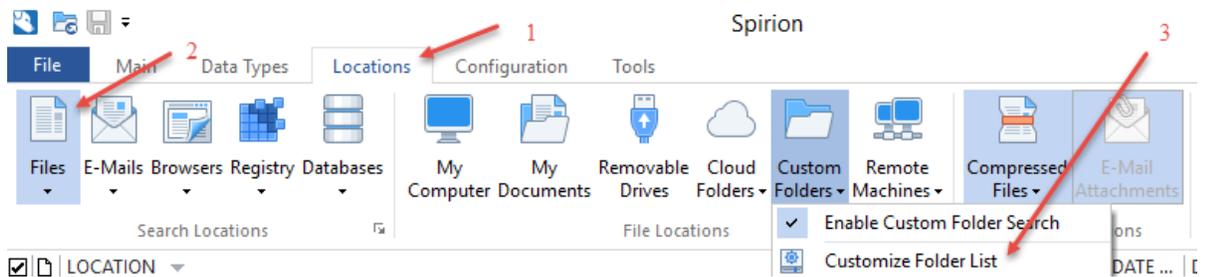
7. Spirion begins scanning. You will see the [Spirion Status window](#) where you can track the search progress:



8. You will be presented with [the Search Summary Window](#) where you will need to decide what to do with the results of the search.

Searching specific folders

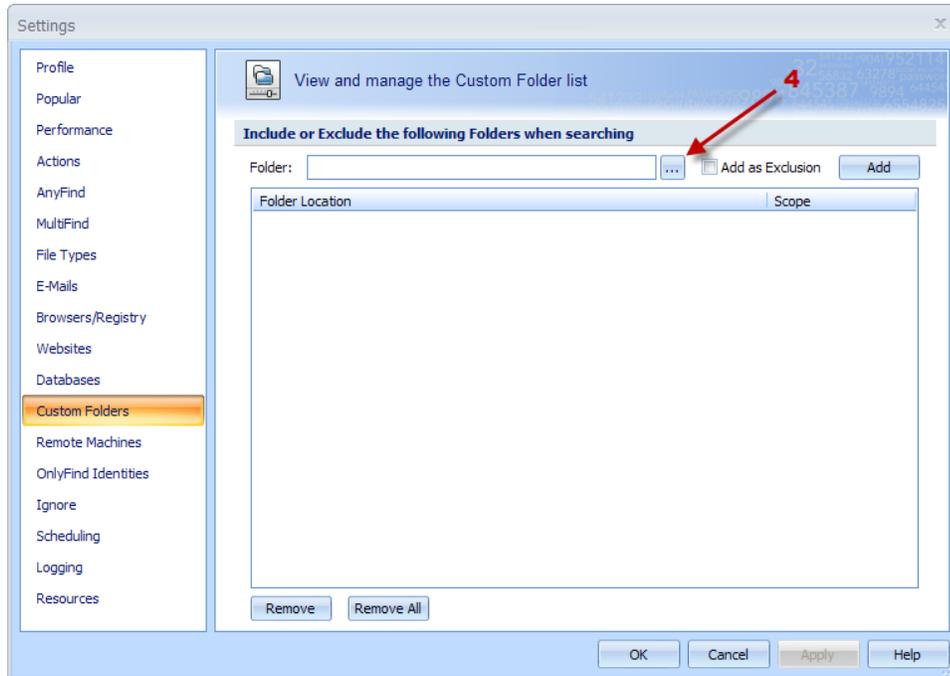
1. Click on the **Locations** tab:



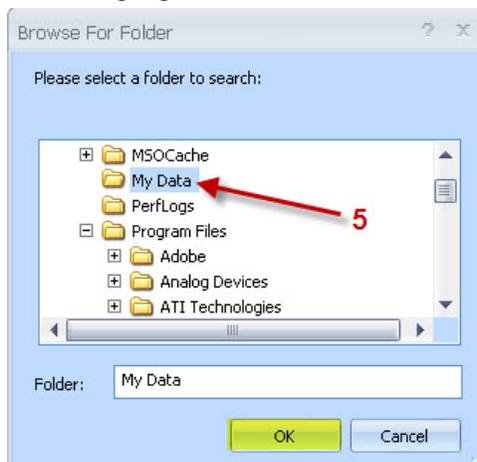
2. In the Search Locations section, enable only Files.

Note: Files larger than 127 Mb will not be searched. Files that are skipped are logged in the client log file available from the Configuration – Logging tab.

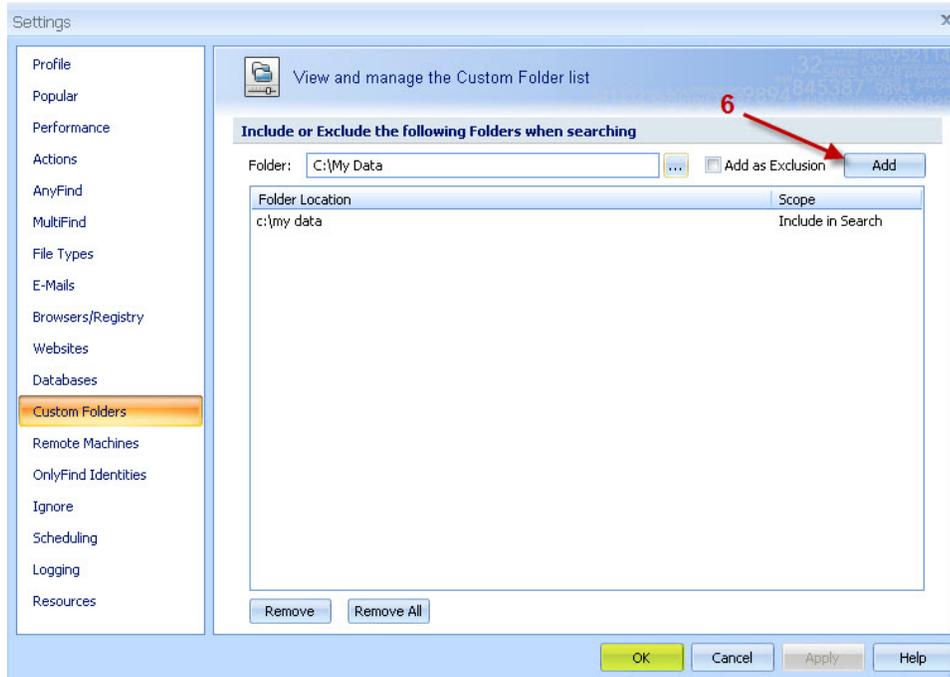
3. In the **File Locations** section, click the top part of the Custom Folders button to enable a custom folder search. Then, customize the custom folder location by clicking the drop down arrow of the **Custom Folders** icon and select **Customize Folder List**.
4. The **Custom Folders** settings window will open. Click on the ellipsis icon  to browse for the folder you would like to search:



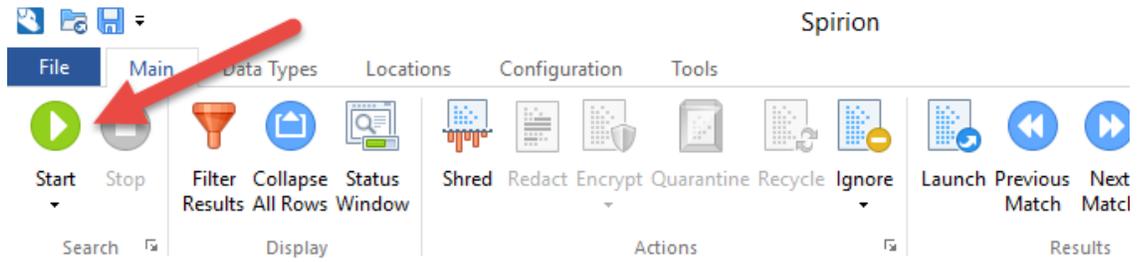
5. The **Browse For Folder** window will open. Browse to the folder you would like to search, click to highlight the folder, and then click **OK**:



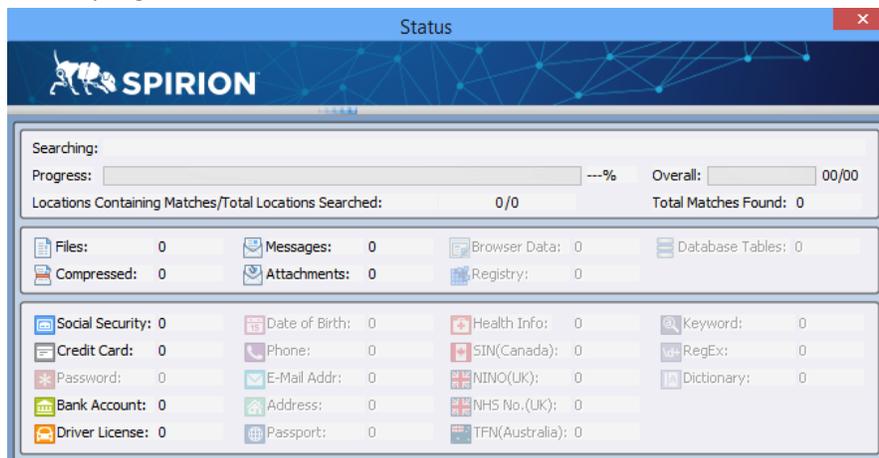
- You will be back in the **Custom Folders** settings window. Click on the **Add** button then click **OK**:



- Click on the **Main** tab. Click on the **Start** icon to begin the search:



- Spirion begins scanning. [You will see the Spirion Status window](#) where you can track the search progress:



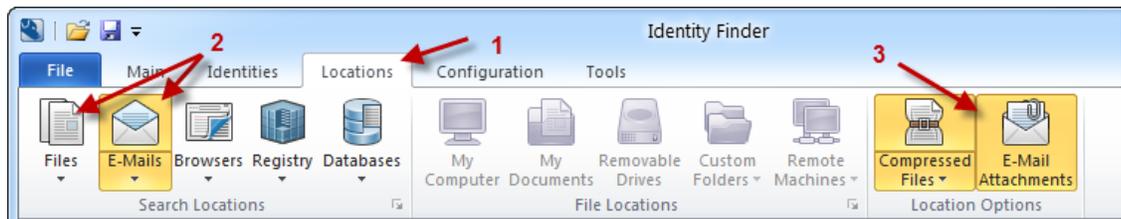
9. You will be presented with [the Search Summary Window](#) where you will need to decide what to do with the results of the search.

Searching E-mail Only

These steps will search only your O365 email that is cached to your local workstation, if you only have your email setup to cache locally 3 months of email, mail older than 3 months in your O365 mailbox will NOT be searched.

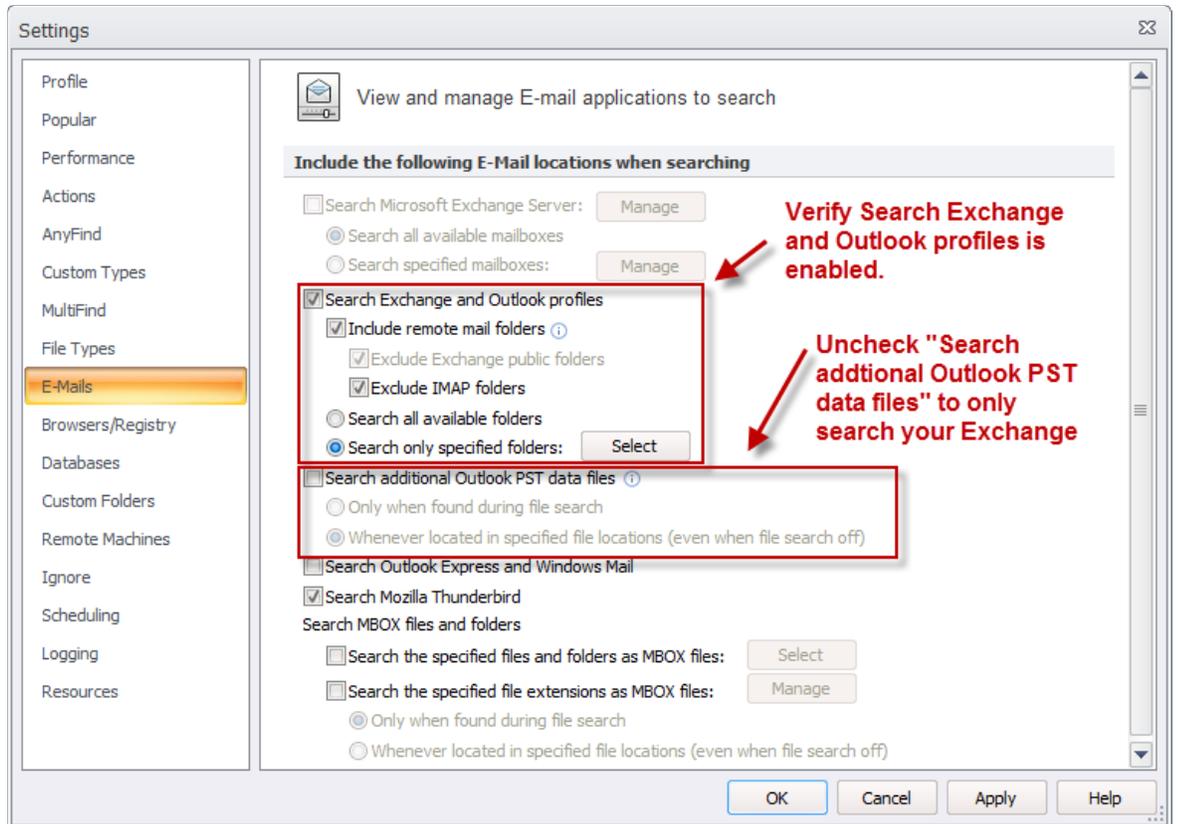
If you find that you are performing an email search and mail is not being searched as you expect, please refer to our quick reference guide specifically for understanding [how mail is searched](#). It should answer your questions on how you have your client configured to search mail.

1. Click on the **Locations** tab:



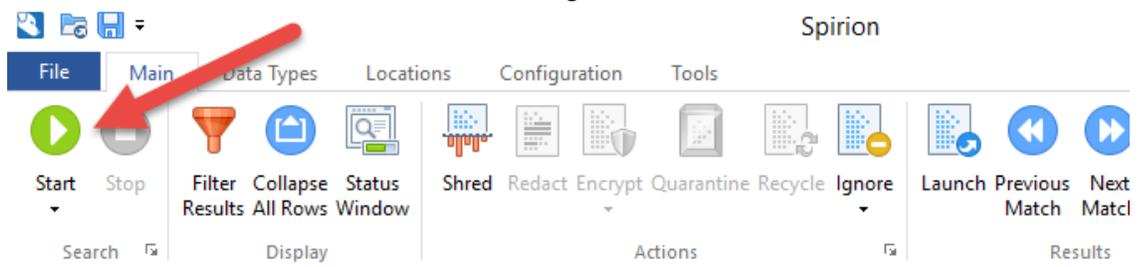
2. In the Search **Locations** section, enable only **E-Mails** (i.e. disable Files if it is enabled).

Click the dropdown under E-mails to customize your email search settings. You will want to enable “Search Exchange and Outlook profiles” and uncheck “Search Additional Outlook PST data files” as shown here:

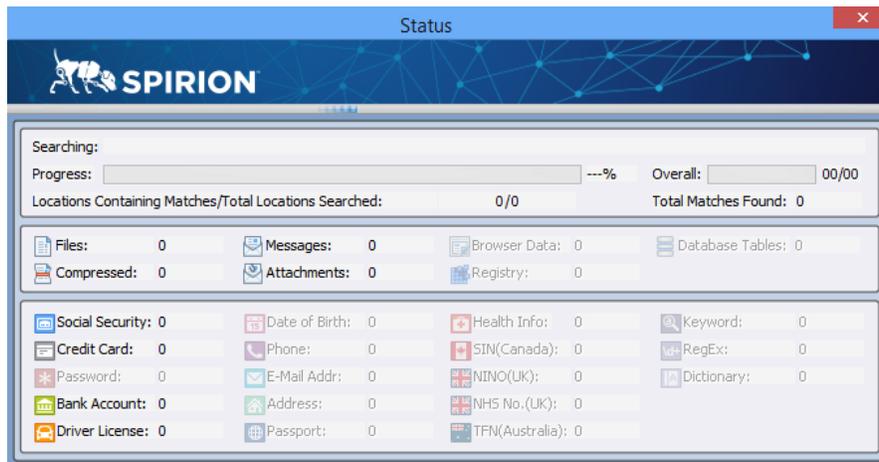


Click OK to close the settings window.

3. In the Location **Options** section select **Compressed Files** to include the contents of any compressed files (.zip, .rar, etc) as well as enabling searching of **email attachments**.
4. Click on the **Main** tab. Click the **Start** icon to begin the search:



5. Spirion begins scanning. You will see the [Spirion Status window](#) where you can track the search progress:



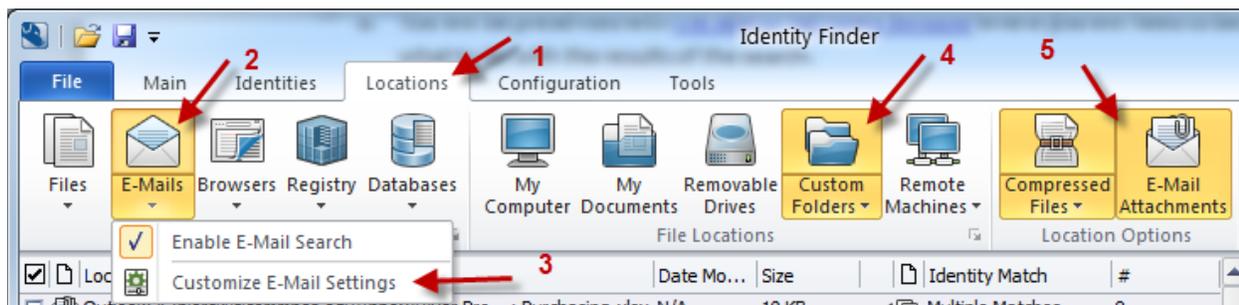
6. You will be presented with [the Search Summary Window](#) where you will need to decide what to do with the results of the search.

Searching Outlook Data Folders (.pst files) only (i.e. NOT your O365 email)

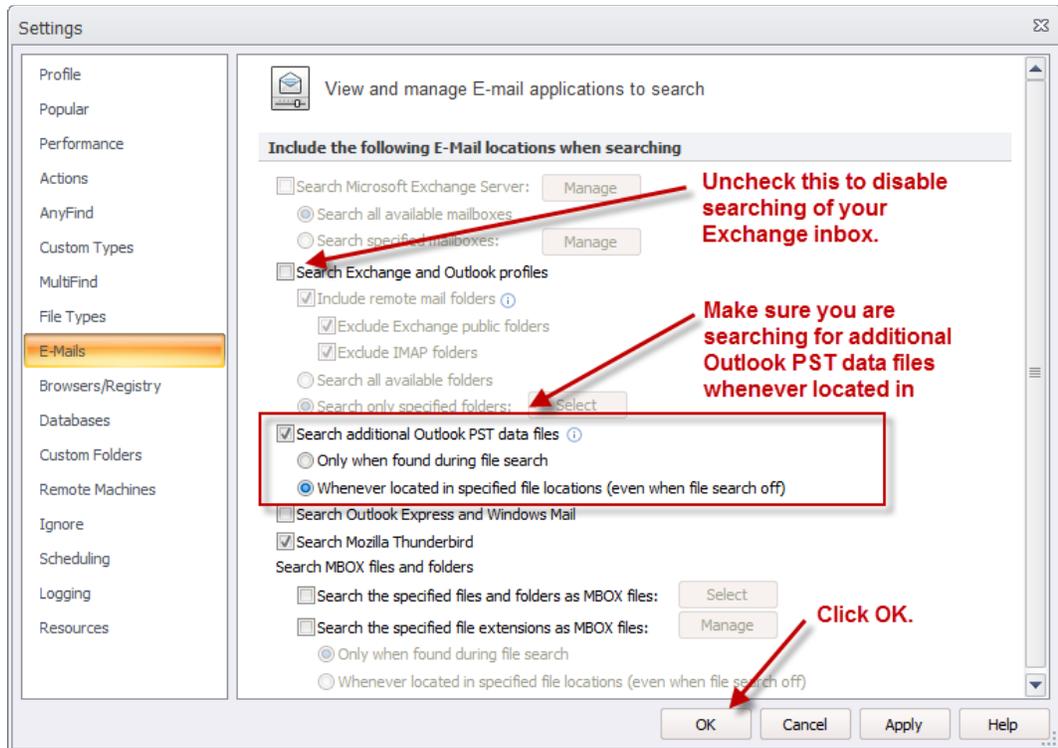
This search will search Outlook Data files (.pst files) in the location you define but will not search your O365 email or Outlook profile or any other files found in the location you specify. It will only search for Outlook Data files (.pst files).

If you find that you are performing an email search and mail is not being searched as you expect, please refer to our quick reference guide specifically for understanding [how mail is searched](#). It should answer your questions on how you have your client configured to search mail.

1. Click on the **Locations** tab:

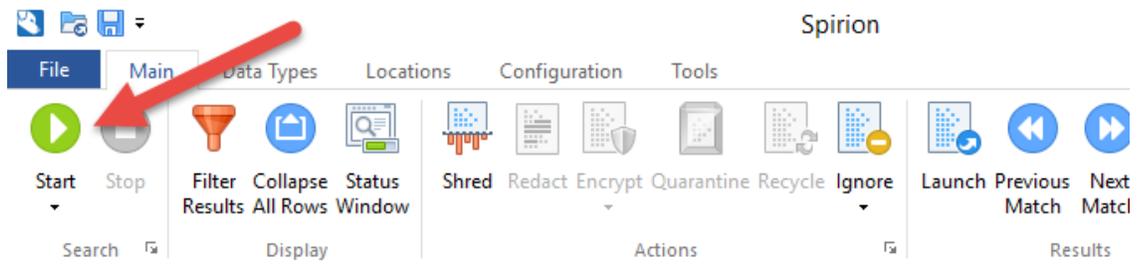


2. In the Search **Locations** section, enable only **E-Mails** (i.e. disable Files if it is enabled):
3. Click the dropdown under Email to customize Email settings. You want to disable searching your O365 email and Outlook profile but still search any Outlook Data files (*.pst) found in the specified location:

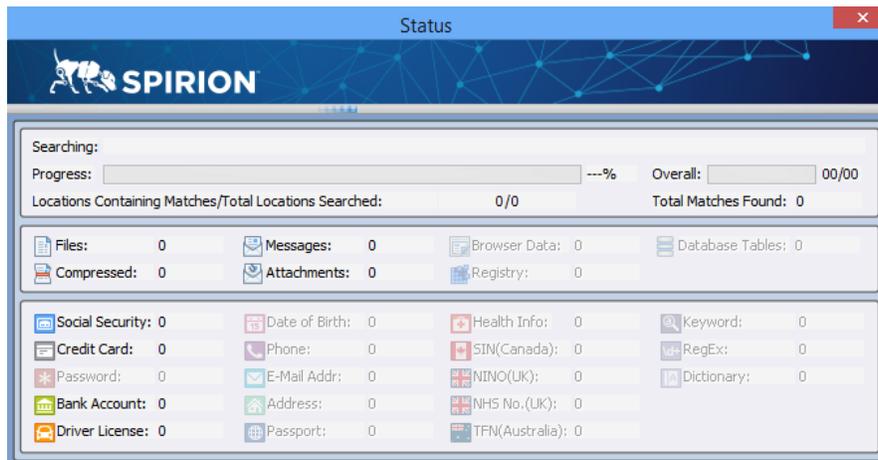


NOTE: It is important to re-enable “Search Exchange and Outlook profiles” after the search has completed so the next time you perform an email search, it will search your O365 mail. You should verify your email customization each time to verify it is set as expected.

4. In the **File Locations** section, select the file location where the Outlook Data Files (*.pst files) are located. For example, you can search My Computer or a Custom location using the Custom Folders file location and customize the location.
5. In the Location **Options** section select **Compressed Files** to include the contents of any compressed files (.zip, .rar, etc) as well as enabling searching of **email attachments**.
6. Click on the **Main** tab. Click the **Start** icon to begin the search:



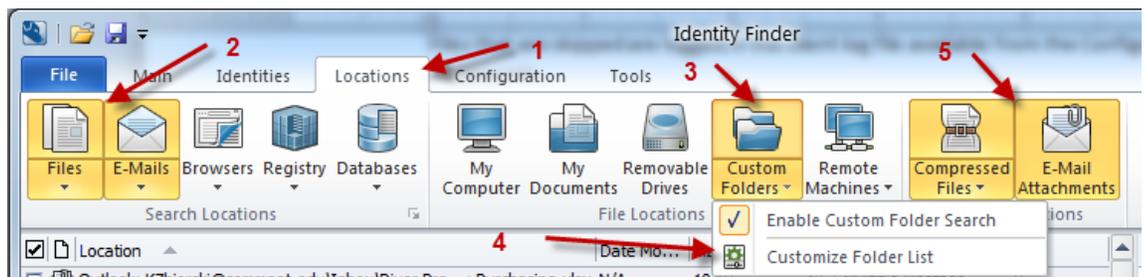
7. Spirion begins scanning. You will see the [Spirion Status window](#) where you can track the search progress:



8. You will be presented with [the Search Summary Window](#) where you will need to decide what to do with the results of the search.

Searching Network Shares

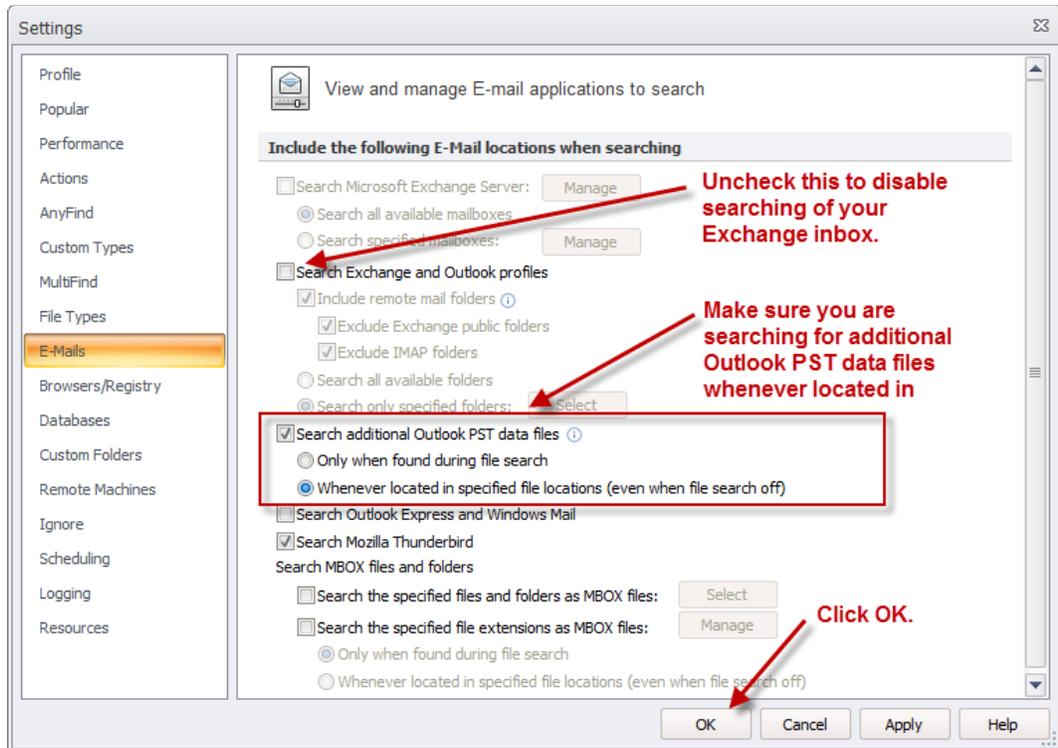
1. Click on the **Locations** tab:



2. In the **Search Locations** section, enable **Files and E-mails**. This will not perform an O365 email search, but will search any Outlook Data files (*.pst files) that are located in the network share.

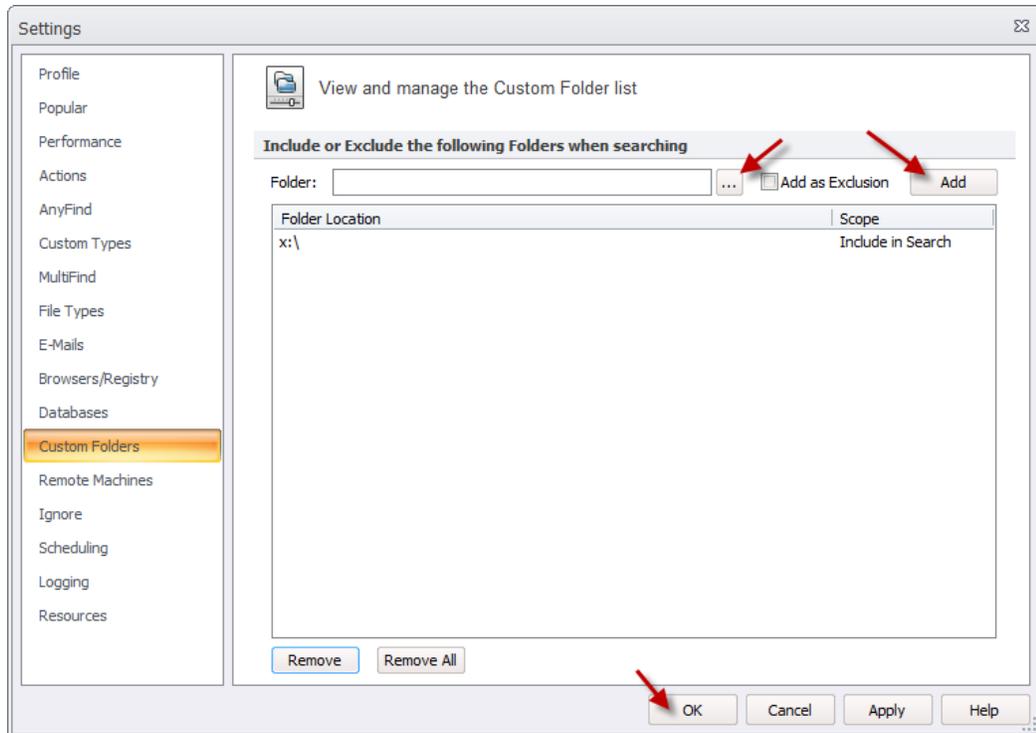
Note: Files larger than 127 Mb will not be searched (this restriction does not apply to Outlook Data files (*.pst). Files that are skipped are logged in the client log file available from the Configuration – Logging tab.

Click the dropdown under Email to customize Email settings. You want to disable “Search Exchange and Outlook profiles” but still search any Outlook Data files (*.pst) found on the network share:



NOTE: It is important to re-enable “Search Exchange and Outlook profiles” after the search has completed so the next time you perform an email search, it will search your O365 mail. You should verify your email customization each time to verify it is set as expected.

3. In the **File Locations** section, click the top part of the Custom Folders button to enable a custom folder search.
4. Then, customize the custom folder location by clicking the drop down arrow of the **Custom Folders** icon and select **Customize Folder List**. The **Custom Folders** settings window will open:

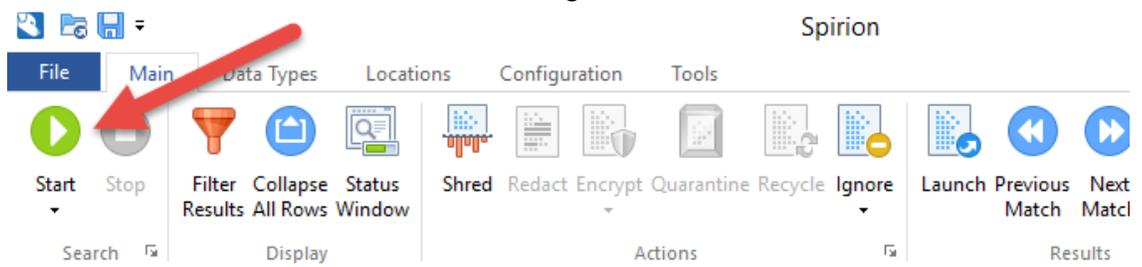


In the Folder field, click on the ellipsis icon  to browse for the network share you would like to search (or you may just enter it in the Folder field), click the **Add** button.

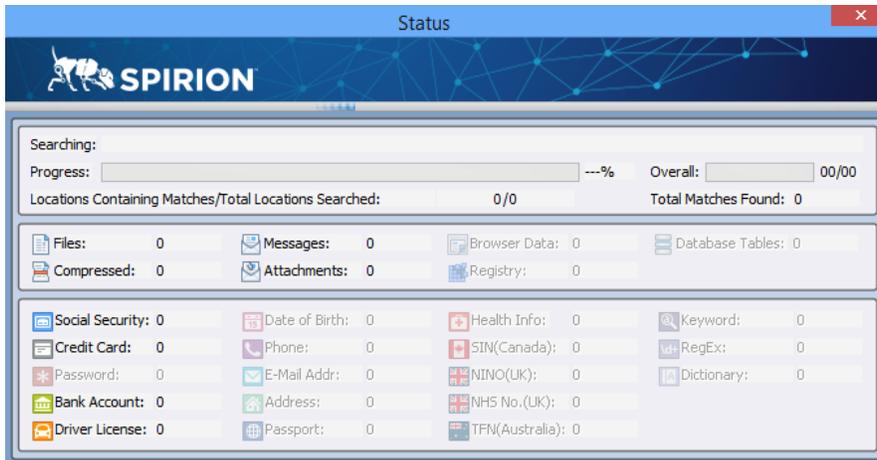
If you wish to exclude any sub folders, enter the folder name and check **Add as Exclusion** before clicking the **Add** button.

When you are done entering your locations, click the **OK** button.

5. In the Location **Options** section, enable both **Compressed Files** and **E-Mail Attachments**
6. Click on the **Main** tab. Click the **Start** icon to begin the search:



7. Spirion begins scanning. You will see the [Spirion Status window](#) where you can track the search progress



- You will be presented with [the Search Summary Window](#) where you will need to decide what to do with the results of the search.

Overview of the Status Window

During or after a search, the Status Window is displayed in front of the Spirion interface. It shows information about the search either as its searching or when it's complete. You can gather a lot of information from the status window. If the status window is not displayed, you can manually display it by clicking **Main – Status Window** if a search is currently running or you opened a Spirion result file:



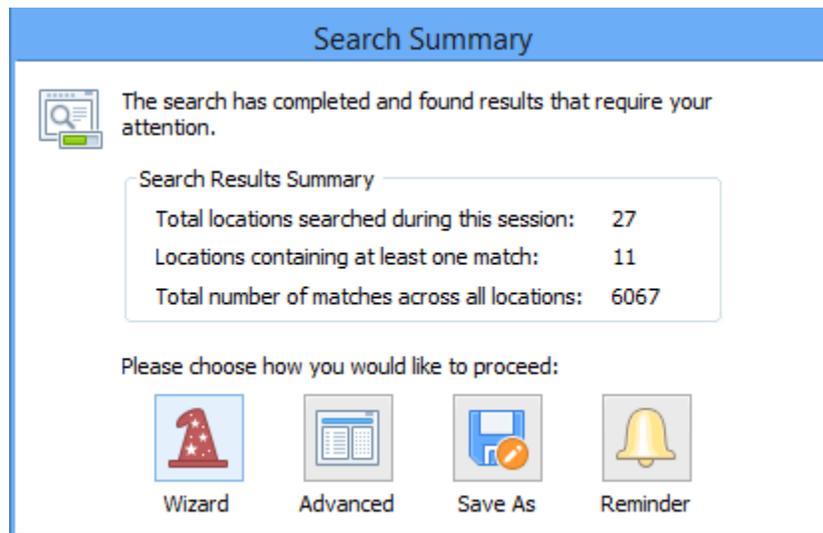
In box 1, you can see that this particular search is finished. It took 7 minutes and 49 seconds to complete. The search identified 12 locations containing a total of 51 matches or identities. The locations and matches are further broken down in boxes 2 and 3.

In box 2, it shows the types of locations that were searched. You can tell from this summary that on the locations tab – the **Files** location was selected and the **Compressed Files** option was enabled, but mail was not searched as Messages is 0.

In box 3, it categorizes the 51 matches by their identity type. You can tell that the search was configured to search for at least Social Security Numbers, Credit Card numbers and Bank Account numbers as those were located in the search location.

Overview of the Search Summary Window

After a search completes, you will see the Search Summary Window:



Your options may be different from what is displayed above, i.e. you may not have all the options available to you. You will see the search summary details as well as the following actions available:

Advanced

most common selection

Use this option to work with your search results using the results window, preview pane and available actions from the Main tab. When you click Advanced, the Search Summary window goes away and you'll be able to use the Spirion interface.

To learn how to work with Spirion results see the [Handling Spirion Results](#) document.

Wizard

If you wish to be walked through your results one location at a time, select the Wizard option. It will ask you what action you would like to perform on checked or selected items in the results window. To learn how to work with Spirion results see the [Handling Spirion Results](#) document.

After you have performed actions on all locations and click the **Finish** button, the wizard will ask if you would like to schedule a regular search. We recommend cancelling and not scheduling a weekly search from the client. Your institution should have scheduled scans.

Save As

If you do not have time to review the search results at this time, but wish to save the results to be opened later. Browse to the location you wish to save your search results to.

You can select to save the results as an *.idf file which is the default Spirion file type – this is the type of file you can open using the Spirion client and have the results displayed in the results window and preview pane. You can also perform actions on locations with results if the results are saved as a Spirion (*.idf) file type.

Or, you may choose to save the results as a clear text HTML or comma delimited file – but once you save the results as this type of file, you cannot open the results file using the Spirion client in order to perform actions on the results. You would only be able to look at the list of results and then perform actions on the locations using Windows.

NOTE: If the results contain identities, you should not save results data in this format to an insecure location as the file does contain the DCL3 data.

Reminder

You may wish to have the Spirion client minimized for a specific amount of time (5 minutes, 30 minutes, 1 hour, etc.). After the amount of time selected has passed, the Spirion results will be displayed and you could then perform action on the results. If you log off before you get the reminder, the search is incomplete and not logged as occurring.