

Dell™ Archive Manager 5.1.2

User Guide



© 2014 Dell Inc.
ALL RIGHTS RESERVED.

This guide contains proprietary information protected by copyright. The software described in this guide is furnished under a software license or nondisclosure agreement. This software may be used or copied only in accordance with the terms of the applicable agreement. No part of this guide may be reproduced or transmitted in any form or by any means, electronic or mechanical, including photocopying and recording for any purpose other than the purchaser's personal use without the written permission of Dell Inc.

The information in this document is provided in connection with Dell products. No license, express or implied, by estoppel or otherwise, to any intellectual property right is granted by this document or in connection with the sale of Dell products. EXCEPT AS SET FORTH IN THE TERMS AND CONDITIONS AS SPECIFIED IN THE LICENSE AGREEMENT FOR THIS PRODUCT, DELL ASSUMES NO LIABILITY WHATSOEVER AND DISCLAIMS ANY EXPRESS, IMPLIED OR STATUTORY WARRANTY RELATING TO ITS PRODUCTS INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, OR NON-INFRINGEMENT. IN NO EVENT SHALL DELL BE LIABLE FOR ANY DIRECT, INDIRECT, CONSEQUENTIAL, PUNITIVE, SPECIAL OR INCIDENTAL DAMAGES (INCLUDING, WITHOUT LIMITATION, DAMAGES FOR LOSS OF PROFITS, BUSINESS INTERRUPTION OR LOSS OF INFORMATION) ARISING OUT OF THE USE OR INABILITY TO USE THIS DOCUMENT, EVEN IF DELL HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. Dell makes no representations or warranties with respect to the accuracy or completeness of the contents of this document and reserves the right to make changes to specifications and product descriptions at any time without notice. Dell does not make any commitment to update the information contained in this document.

If you have any questions regarding your potential use of this material, contact:


Dell Inc.
Attn: LEGAL Dept
5 Polaris Way
Aliso Viejo, CA 92656


Refer to our web site (software.dell.com) for regional and international office information.


Trademarks

Dell and the Dell logo are trademarks of Dell Inc. and/or its affiliates. Other trademarks and trade names may be used in this document to refer to either the entities claiming the marks and names or their products. Dell disclaims any proprietary interest in the marks and names of others.

Legend

 **CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.

 **WARNING:** A WARNING icon indicates a potential for property damage, personal injury, or death.

 **IMPORTANT NOTE, NOTE, TIP, MOBILE, or VIDEO:** An information icon indicates supporting information.

User Guide
April 2015
Software Version - 5.1.2

Doc ID 103

Contents

Getting Started with Archive Manager	5
Introduction	5
How do I?	5
Do an investigation	6
Find someone I've communicated with	6
Share my mailbox with other users	6
Find an attachment	7
Get automatically alerted when particular emails arrive	7
Searching Email	8
The Email Search form	8
Search controls	8
How to perform a search	9
Search criteria tabs	9
Search tab (text-match search)	10
Advanced searches	12
To/From tab	12
Date Range tab	14
Attachments tab	14
Mailbox tab	14
Tags tab	15
Viewing your search results	15
Saving and reusing searches	15
Executing a saved search	15
Working with saved searches	15
Working With Messages	18
Managing search results	18
Using message tabs	20
Message	20
Comment	20
Headers	21
Journal Report	21
Access History	21
Tags	22
Using the toolbar	22
Reconstructing messages using the Archive Manager Outlook Form	25
Reconstructing stripped messages with Windows Authentication	25
Adding the Archive Manager site to the intranet zone	25
Opening stripped messages from a shared folder	26
Reconstructing messages using the Outlook Web App (OWA)	26
Standard Mailboxes	27
About standard mailboxes	27

Types of mailboxes . . . . .	.28
Custom Mailboxes	29
About custom mailboxes . . . . .	.29
Add a custom mailbox . . . . .	.29
Add folders to a custom mailbox . . . . .	.29
Rename a custom mailbox . . . . .	.30
Delete a custom mailbox . . . . .	.30
Security . . . . .	.30
Add user access . . . . .	.31
Remove user access . . . . .	.31
Reports	32
About reports . . . . .	.32
Storage Statistics report . . . . .	.32
Search Log report . . . . .	.33
Viewing your search results . . . . .	.34
Questionable Access report . . . . .	.34
Viewing your search results . . . . .	.34
Of All Email (by Specific Person) report . . . . .	.34
Of My Email (by Anyone) report . . . . .	.35
Viewed Messages report . . . . .	.36
My Search Log report . . . . .	.36
Mailbox Scan Status report . . . . .	.37
Subscribe to RSS	38
Monitoring email with RSS . . . . .	.38
Accessing your Archive From a Mobile Device	39
Overview . . . . .	.39
Searching for messages . . . . .	.39
Viewing the search results . . . . .	.40
About Dell	41

Getting Started with Archive Manager

- [Introduction](#)
- [How do I?](#)

Introduction

Archive Manager's main screen display appears when you sign in:

The Email Search page allows users to perform the following actions:

- **Search:** Lets you perform detailed and flexible searches. See the [Searching Email](#) chapter for more information.
 - **Standard Mailboxes:** Typically this will be the Mailbox that corresponds to your email address. If you have access to other users' Mailboxes, they will also appear in this area. See the [Standard Mailboxes](#) section for more information.
 - **Custom Mailboxes:** You can use custom Mailboxes to group related messages together. See the [Custom Mailboxes](#) section for more information.
- **Saved Searches:** This menu is displayed only when you have saved your first search. See the [Saving and reusing searches](#) section for more information.
- **Options:** You can change your Archive Manager password in this area for users created in Archive Manager. The Active Directory Connector will overwrite Archive Manager when populating password data from the mail server.
- **Reports:** By default, users are granted the **User** security role. In this case, they will only see the **My Search Log** report. Other reports are available depending upon your access permissions. See the [Reports](#) section for more information.
- **Main Content:** To the right of the Tools sidebar, this area contains the tabbed Email Search form where most of your searches take place, and where the results of your searches and reports are displayed.



To collapse (hide) any **Tools** menu: Click the up-arrow icon to the right of the menu heading.

To expand (un-hide) any **Tools** menu: Click the down-arrow icon to the right of the menu heading.

To collapse (hide) or expand (un-hide) the entire **Tools** sidebar column: Click the vertical gray **Tools** bar between the sidebar and the Main Content.

How do I?

This section guides you through some of the common functions that you might want to use within Archive Manager and is intended to help you become familiar with some of the ways that it can be used.

- Do an investigation
- Find someone I've communicated with
- Share my Mailbox with other users

- Find an attachment
- Get automatically alerted when specific emails arrive

Do an investigation

Archive Manager is ideal for you if you need to sift through email as part of an investigation: using the Email Search tab, you can simply enter your required search criteria and Archive Manager will list all the matching messages and/or attachments.

With Archive Manager you can search the full text of emails and attachments, or restrict searches to specific fields. Tags and comments related to a specific investigation or project are able to be assigned to messages to further refine investigations.

Find someone I've communicated with

You can search for a person or email address, and Archive Manager will display all the messages sent to, from, or to and from that person.

Getting Started:

Go to the **To/From** tab of the **Email Search** form. For detailed information please refer to **To/From tab** section of this guide.

Share my mailbox with other users

See also: [About custom mailboxes](#).

To give another user access to your Mailbox:

- 1 In the Tools sidebar: Right-click the Mailbox Name, and select **Security** from the pop-up menu to display the Archive Manager **Security** dialog box.
- 2 Enter all or part of a name in the **Find User** field and click **Search**.
- 3 Select the checkbox next to the user you wish to have access to your Mailbox. Multiple users are able to be selected and added simultaneously.
- 4 Click the **Add to Mailbox** button.
The selected users are added to the access list on the left side of the screen and removed from the list on the right side of the screen.
- 5 Click the **Close** icon [X] to close the dialog box. Next time the user(s) you selected signs in to Archive Manager, or refreshes their screen if already signed in, your Mailbox will be visible in their Standard Mailboxes list.

To remove another user's access to your Mailbox:

- 1 Navigate to the desired Mailbox in the Standard Mailboxes menu.
- 2 Right-click the Mailbox and select **Security** to display the Archive Manager **Security** dialog box.
- 3 Select the checkbox next to the user(s) whose access you want to remove.
- 4 Click **Remove Access**. The user is removed from the access list on the left side of the screen and replaced in the list on the right side of the screen.
- 5 Click the **Close** icon [X] to close the dialog box.

Next time the user(s) you removed sign in to Archive Manager, or refreshes the screen if already signed in, your Mailbox will no longer be visible in their Standard Mailboxes list.



NOTE: Security can be added only to a complete Mailbox. It is not possible to give other users access to a single folder within your Mailbox.

Find an attachment

Archive Manager provides the capability of searching for an attachment, as well as text contained within an attachment, then displaying all the messages that contain the attachment, or all the attachments that contain your specified text.

Getting Started:

To search for an attachment, go to the **Attachments** tab of the **Email Search** form.

To search for text contained within an attachment, go to the **Search** tab of the **Email Search** form. Your search can be further refined using the other **Email Search** tabs if necessary. For more information please refer to [Attachments tab](#) section of this guide.

Get automatically alerted when particular emails arrive

Archive Manager provides the capability to generate a unique URL based on your search criteria. When this URL is put into an RSS aggregator, it will perform the search regularly and will inform you when new emails that match your search criteria are found in Archive Manager.

Getting Started:

- 1 Go to the Email Search form, enter your search criteria, and execute your search.
- 2 Go to the Save Search tab to subscribe to RSS.

See also the [Subscribe to RSS](#) chapter for more information.

Searching Email

- [The Email Search form](#)
- [Search criteria tabs](#)
- [Viewing your search results](#)
- [Saving and reusing searches](#)

The Email Search form

The **Email Search** form is a tabbed form that lets you perform detailed and flexible searches. A search is defined by any combination of search criteria you enter on one or more tabbed panels: Search (for a text string), To/From, Date Range, Attachments, Mailbox, and Tags. A search is executed by clicking the **Search** button that appears below the tabbed panels.

- i** **NOTE:** Since actual eDiscovery runs are often needed under rush circumstances, you might want to try one or more practice eDiscovery runs during non-critical times to familiarize yourself with the tool and its baseline times, and just to become comfortable with the process.

For Exchange systems, Archive Manager indexes all the meaningful fields of non-email items as if they were parts of a message body, to make them available to text searches. These non-email item types include:

Table 1:

- | | | |
|-------------------------|-----------------|-------------------------------|
| • calendar appointments | • tasks | • contacts |
| • personal appointments | • task requests | • personal distribution lists |
| • meeting invitations | • sticky notes | |

For GroupWise systems, public messages, private messages, and calendar items are indexed.

A simple text search may therefore return these non-email items if the search string occurs in those items as part of a meeting location, appointment time, contact company name, etc.

Search controls

The following sections describe the search controls for Archive Manager.

Tabbed panels for search criteria

The criteria for different types of searches are defined on different tabbed panels within the search form:

- **Search:** Perform text-based searching.
- **To/From:** Search for messages that have been sent to or received from a particular person or persons.
- **Date Range:** Search for messages received on a specific date or between specific dates.
- **Attachments:** Search for attachment content. This tab lets you specify the file name, size and type.

- **Mailbox:** Search for messages in a specific mailbox, or a specific folder within a mailbox. You can also select to search subfolders within the specified folder.
- **Tags:** Search for messages by user-defined categories.

The **Save Search** tab does not define any search criteria, but rather lets you save and reuse commonly used or complex searches. These features are described separately under [Saving and reusing searches](#) below.

- ① **NOTE:** Search criteria may be effectively "hidden" on a non-selected tab—that is, all search criteria defined on all tabs remain in force, even though some may not be visible when the **Search** button is clicked to execute a search. We therefore recommend that you routinely click **Clear** before starting each new search, to remove any lingering criteria defined on other tabs.

Checkboxes for search criteria

- **All Users:** A mark in this checkbox tells the Search feature to search the entire Archive Manager archive for messages, or attachments. This checkbox is visible only if your account is assigned to a security role that has been granted the *Search All Emails* security action.
- ① **NOTE:** When you conduct a search in a specific mailbox, selecting **All Users** does not override the mailbox-level search. Only the selected mailbox will be searched.
- **All Instances:** A mark in this checkbox tells the Search feature to search the local server and all Federated Search Instances. This checkbox is visible only if your user credentials are authorized to "Search All Instances".

Multi-criteria searches

If you enter search criteria on more than one tab, the criteria are cumulative. That is, the search will return only results that meet *all* of the criteria entered. Each tab you use therefore further *limits* the results of a search.

You can define multi-criteria searches like this all at once—defining all criteria on multiple tabs and then clicking the **Search** button. Or you can refine a search iteratively: performing an initial search, then reviewing the results, and then defining additional criteria and re-running the search to incrementally narrow the scope of the results over a series of two or more searches.

How to perform a search

To perform a search:

- 1 Define search criteria in one or more of the tabbed panels, as described separately under [Search criteria tabs](#) below.
- 2 Mark or unmark the checkboxes to the right of the Search button to indicate whether you want to search **All Users** and/or **All Instances** (if these options are available to your user credentials).
- 3 Click the **Search** button to execute the search.

See [Viewing your search results](#) below for information about the results display, and what you can do with the Results Table.

Search criteria tabs

The following section describes the search criteria tabs for Archive Manager.

Search tab (text-match search)

The **Search** tab lets you perform text-based searches.

- NOTE:** For Exchange systems, Archive Manager indexes all the meaningful fields of non-email items (calendar appointments, meeting invitations, tasks, contacts, and so forth) as if they were parts of a message body, to make them available to text searches. So, for example, a simple text search may return such non-email items if the search string occurs in those items as part of a meeting location, appointment time, contact company name, etc.

To define a search on this tab for a message or attachment containing a specific word or phrase:

- **Search for:** Enter the word, phrase or other text string that you want the feature to find. See Text Search Guidelines below for more information.
- **Search in:** Define the scope of the search by checking one or more of the checkboxes to indicate where to conduct your search:
 - **Subject:** The subject lines of messages (pre-selected by default).
 - **Body:** The main message contents of messages (pre-selected by default).
 - **Attachments:** The files attached to messages.

General text search guidelines

Text-string searches are subject to these rules and conventions:

- **Case:** All text-string searches are case-*insensitive*.
- **Multiple search terms:** Two or more terms separated by spaces in the **Search for** field are regarded as multiple separate search terms, *both* of which must occur in the message (or attachment). Multiple search terms may occur in any order. For example:
 - **contract dispute** will return all items that contain both words, regardless of whether the words appear adjacent to each other, and regardless of the order in which they occur.
- **Searching for an exact phrase:** To search for an exact phrase (two or more terms separated by spaces, occurring in a particular order), enclose the phrase within quotes. For example:
 - **"contract dispute"** will return all items that contain the phrase "contract dispute," but not messages that contain just one word or the other, or that contain both words but not adjacent to each other in the quoted order.
- **Common short words:** The Search feature ignores short common words such as:

Table 2:

Common Short Words

a	be	into	on	then	was
an	but	is	or	there	will
and	by	it	such	these	with
are	for	no	that	they	
as	if	not	the	this	
at	in	of	their	to	

Do not use common short words when searching in phrases. For example, for the phrase:

"Meet at noon for lunch"

Use:

"Meet noon lunch"

- **Wildcard Searches:** Archive Manager supports wildcard searches with an asterisk character or a question mark. An asterisk stands for zero or more unspecified characters, and can occur in the middle or at the end of a search string. A question mark will perform a single character wildcard search. Wildcards do not work in exact phrase queries. For example:

- **test*:** finds such words as the following: "test"; "tests"; "testing"; and "testimonial".

A wildcard may not occur as the first character of a search string.

- **te?t:** finds such words as the following: "text"; "test"; and "tent".
- **Regular expression searches:** A regular expression search allows for more flexible searching by using specific syntax to find text-based patterns. This search is conducted by prefixing the search with **regex:**. For example, if you want to search for a credit card number starting with 51 or 55 with an optional dash or a space, you could perform the following search:

- **regex:** `^5[15]\d{2}-?\s?\d{4}-?\s?\d{4}-?\s?\d{4}$`

NOTE: Regex searches that have a leading wildcard have a dramatically increased search time because each record must be processed in the search. Adding at least a one-character prefix solves this issue.

- **Fuzzy Searches:** To perform a fuzzy search, use the tilde "~" symbol at the end of a single word. For example, when sea
 - **bat~:** finds such words as "fat" and "bats".
- **Proximity Searches:** To perform a proximity search, use the tilde "~" symbol at the end of a phrase. For example:
 - **"Archive Manager"~6:** finds results that contain the words "Archive" and "Manager" within six words of each other.
- **Boolean Operators:** Boolean operators let you combine terms with logic operators to create complex, compound search expressions. Archive Manager supports Boolean operators AND, OR, NOT, and the concatenations '+', and '-'. Boolean operators are case-*insensitive*, and will be interpreted as Boolean operators unless they occur within a quoted search string. Concatenations do not require a space:

NOTE: The NOT operator can be used *only* in conjunction with a positive query. For example, a search for NOT "meeting request" will return no results.

Table 3:

	DESCRIPTION	EXAMPLE
AND or &&	The AND operator is the default conjunction operator. This means that if there is no Boolean operator between two terms, the AND operator is used. The AND operator links two terms and returns results if either of the terms exist in a document. The symbol && can be used in place of the word AND.	For documents that contain 'sales meeting' and 'meeting room': "sales meeting" AND "meeting room"
+	The '+' or required operator requires that the term after the '+' symbol exist somewhere in the field of a single document.	For documents that must contain the words 'meeting' and 'room' within several words of each other in the message component(s) specified: +meeting room

Table 3:

	DESCRIPTION	EXAMPLE
OR or ||	The OR operator returns results where either term exists anywhere in the text of a single document. The symbol || can be used in place of the word OR.	For documents that contain either 'meeting request' or just 'meeting': "meeting request" || meeting –or– "meeting request" OR meeting
NOT	The NOT operator excludes documents that contain the term after NOT. This is equivalent to a difference using sets. The symbol '!' can be used in place of the word NOT.	For documents that contain 'meeting request' but not 'room': "meeting request" NOT room
-	The '-' or <i>prohibit</i> operator excludes documents that contain the term after the '-' symbol.	For documents that contain 'sales meeting' but not 'meeting room': "sales meeting" - "meeting room"

- **Grouping:** Archive Manager supports using parenthesis to group clauses to form sub-queries. For example, to search for items that contain either "sales" or "team" in addition to the word "meeting" you could use the query: (sales OR team) AND meeting) (see Boolean Operators above).
 - http://lucene.apache.org/java/2_9_2/queryparsersyntax.html#Grouping
 - Lucene supports using parentheses to group clauses to form sub queries. This can be very useful if you want to control the boolean logic for a query.
- **Special Characters:** Archive Manager does not index non alpha-numeric characters, with the exception of certain common patterns including email addresses, IP addresses and URLs. It is recommended that you exclude the following special characters in search queries as they will be removed as part of the search process. However, if used, the following characters need to be escaped using the '\' character:
 - + - &#amp; || ! () { } [] ^ " ~ * ? : \

Advanced searches

If you wish to perform advanced searches including the following, refer to the Apache Lucene documentation:

- Additional parameters for performing a Fuzzy search
- Boosting a Term
- Grouping

To/From tab

The To/From tab lets you find messages that have been sent to or received from a particular person or persons.

Enter the recipient or sender information in the appropriate fields:

- **To or From:** Finds messages sent to *or* from the specified person or persons.
- **To:** Finds only messages sent to a specific person or persons.
- **From:** Finds only messages received from a specific person or persons.

Multiple values can be specified in any field, by entering semicolons (;) to separate the values: fred.smith@domain.com; john.jones@domain.com. When multiple values are entered in a field, the search will return emails that contain *any* of the listed addresses. (A semicolon functions as an OR operator.) For example,

a search for emails **To** 'john@domain.com; fred@domain.com' will return both emails to John and emails to Fred, plus any emails to both of them.

- NOTE:** The **OR** operator is *not* recognized in the **To/From** tab. You must use a semicolon, as described above, to compose a multi-value search expression that will return results containing *any* of the multiple terms.

If values are entered into *both* the **To** and **From** fields, the search results are cumulative; results will include only messages that match *both* criteria.

In any of these fields, you may enter:

- All or part of an email address (for example: fred.jones@domain.com or *@domain.com).
- All or part of a display name (for example: John Smith or *Smith).

Values are case-*insensitive*.

If you are unsure of the email address or name of the person, you may click the Browse button [...] to the right of the field to start a .

- NOTE:** The Person Search form is only available if the user belongs to a security role that has been granted the *Person Search* permission.

Person Search

The Person Search Browse buttons (to the right of each field box, marked by [...]) let you select **To/From** field entries from the Archive Manager database of the display names and email addresses of all senders and recipients in the mailbox.

To open the **Person Search** form:

- Click the Browse button [...] next to the **To/From**, **To**, or **From** field.

To use the **Person Search** form:

- 1 Enter a value in the **Search for** field. Valid values are:
 - All or part of an email address (for example, fred.jones@domain.com or *@domain.com); or
 - All or part of a display name (for example, John Smith or *Smith)
- 2 Select the **Email** and/or **Name** checkboxes to specify the type of search.

Non-administrator Accounts: When logged in to Archive Manager, users with non-administrator accounts can search external email addresses if the user has had correspondence with the email address and the email has been archived. Additionally, users with non-administrator accounts can search all email addresses that belong to users with active logins in Archive Manager.

Administrator Accounts (Accounts with a Search All Emails security action): When logged in to Archive Manager, administrator accounts can search any email addresses on emails that have been archived by Archive Manager, including external email addresses, regardless of whether the administrator account has had correspondence with the email address. Additionally, users with administrator accounts can search all email addresses that belong to users with active logins in Archive Manager.

- 3 Click **Find People** to execute the search.
- 4 In the search results table: Mark the checkbox next to each name you want to insert into the **To/From** search panel field. You can select any number of names.
- 5 Click **OK** to close the **Person Search** dialog box and add the person(s) to the field in the **To/From** search panel.

- NOTE:** Values are not case sensitive. For example, searching for jim will return the same results as searching for Jim or JIM, etc.

Date Range tab

Use the **Date Range** tab to search for messages based on the date that the message was received.

Choose one of the following radio-button options to specify a date range:

- **All:** (Default): All messages regardless of date received. This option must be used in conjunction with other criteria, such as search text or recipient information. Attempting to search using only the All option will generate an error.
- **Today:** Messages received on the current date.
- **Yesterday:** Messages received on the previous day.
- **This Week:** Messages received within the current calendar week.
- **Last Week:** Messages received in the previous calendar week.
- **This Month:** Messages received between the current date and the first day of the current month.
- **Last Month:** Messages received between the first and last day of the previous month.
- **Between** (and related fields): Messages received within a specified period. Selecting this option causes the **Date From:** and **Date To:** fields to appear, so you can specify the date range to search. Each date value is selected from a pop-up calendar that appears by clicking on the drop-down arrow next to the field.

Attachments tab

The **Attachments** tab lets you search for an email containing a specific attachment, or the attachment itself, and lets you specify the File Name, Size and Type.

To find an attachment, enter information in any or all of the following fields:

- **File Name:** Enter all or part of the file name of the attachment.
- **File Size:** (drop-down and field). Select a value from the drop-down (greater-than or less-than), and enter a value in kilobytes.
- **File Type:** Searches for attachments of the specified type.

Mailbox tab

The **Mailbox** tab lets you search for messages in a specific Mailbox, or a specific folder or subfolder within a Mailbox.

To find messages that are stored in a specific Mailbox, or in a folder within a Mailbox, select the desired values for these fields:

- **Mailbox:** Specify the single **Mailbox** you want to search, or that contains a folder you want to search. The drop-down list shows all Mailboxes to which you have access, based on the information associated with your login.
- **Folder:** Specify the single folder you want to search (within the designated **Mailbox**). If you want to search the whole Mailbox, not limiting the search to a single folder, then select the **All** option.



NOTE: The drop-down list for the **Folder** field is populated after a value is selected for the **Mailbox** field. If the default value of (All) is selected for the Mailbox field, then (All) is the only available value for the **Folder** field.

- **Include sub-folders:** Select this checkbox to search subfolders of the folder you've specified for the search.

Tags tab

Tags provide a way of categorizing email messages within Archive Manager. For example, you can tag messages as being associated with a particular project or investigation. This allows you and your organization to access the email data more effectively. At an application level, Archive Manager allows metadata to be assigned to email messages to facilitate the easier location of email data.

- **Tag:** Select a tag type from the drop-down list.
- **Tag Value:** Enter the exact value of the tag(s) you are searching for. With tags, you can search boolean values with either Yes/No or True/False. Tag values must be entered as absolutes, without quotes, wildcards, etc. This feature can be used to associate messages with particular projects or job codes.

Viewing your search results

Messages matching your search criteria will be displayed and an Archive Manager information panel will indicate what search criteria have been used. (Please note that Archive Manager returns only the top 5000 results).

See the [Managing search results](#) section of the [Working With Messages](#) chapter for more information.

Saving and reusing searches

The **Save Search** tabbed panel lets you save frequently used and complex searches, which can later be recalled for future searches. To save a search:

- 1 Create and execute a search using the **Search** tab.
- 2 Go to the **Save Search** tab.
- 3 Enter a name for your search in the **Save Search As** field.
- 4 You may optionally select the **All Users** checkbox (below the tabbed panel) if you have the necessary permissions, to search the entire Archive Manager message and file stores.
- 5 Click **Save** to save your search.

The names of saved searches appear under **Saved Searches** in the Tools sidebar (to the left of the Email Search form).

The **Saved Searches** menu is not visible until you have saved at least one search. Likewise, the menu will disappear from the left-hand pane if you delete all your saved searches.

Executing a saved search

To execute a saved search, click the title of the saved search in the Saved Searches menu (in the Tools sidebar). The related Email Search form, and the search results are displayed along with a description of the search criteria used.

Working with saved searches

To work with a previously saved search, execute the search and then select any of the following:

- **Update a saved search:** Modify the search to use new criteria.
- **Use a saved search as a starting point:** Refine or redefine the criteria of the saved search to perform a new search.
- **Use a saved search as the basis for a new search:** Create a new saved search based on the criteria for the existing saved search.

- **Delete a saved search:** Remove a saved search.
- **Subscribe to RSS:** Receive updates in your RSS reader for new messages that meet your saved search criteria



NOTE: Before you can work with a saved search, the search must first be executed.

Updating a saved search

To modify a saved search and update the search with new search criteria:

- 1 Execute the saved search. The related search criteria are entered into the appropriate tabs of the **Email Search** form.
- 2 Select the appropriate tab and modify the search criteria accordingly.
- 3 Select the **Save Search** tab. The title of the saved search is displayed in the **Save Search As:** field, and the **Save As**, **Update**, and **Delete** buttons are displayed and enabled.
- 4 Click **Update**. The saved search is updated with the modified search criteria, the search is executed automatically, and the revised search results are displayed below the search criteria.

Using a saved search as a starting point

To use a saved search as the starting point for another search:

- 1 Execute the saved search. All of your search results are displayed. The related search criteria are displayed in the appropriate tabs of the **Email Search** form.
- 2 Modify the search criteria or enter new criteria on the appropriate tabs.
- 3 Click **Search** to execute a new search based on your modified search criteria.

Using a saved search as the basis for a new saved search

To use a saved search as the basis for creating a new saved search:

- 1 Execute the saved search. The related search criteria are entered into the appropriate tabs of the **Email Search** form.
- 2 Modify the search criteria or enter new criteria on the appropriate tabs.
- 3 Select the **Save Search** tab and specify a name for the new search in the **Save Search As:** field.
- 4 Click **Save**. The **Saved Searches** menu is updated with the title of the newly saved search added to the list of menu items, the search is executed and the search results are displayed below the search criteria.

Deleting a saved search

To delete a saved search:

- 1 Execute the saved search. The related search criteria used are entered into the appropriate tabs of the **Email Search** form.
- 2 Select the **Save Search** tab and click **Delete**. A confirmation message is displayed.
- 3 Click **OK**. The title of the saved search is removed from the **Saved Searches** menu, and the **Email Search** form is displayed with no search criteria or results.



NOTE: If you delete all your saved searches, the **Saved Searches** menu disappears from the left-hand pane.

Working With Messages

- [Managing search results](#)
- [Using message tabs](#)
- [Using the toolbar](#)
- [Reconstructing messages using the Archive Manager Outlook Form](#)
- [Reconstructing messages using the Outlook Web App \(OWA\)](#)

Managing search results

Once you have located archived data within Archive Manager, there are several options available to you. These options include:

- View, forward, or reply to a message.
- Send a message to the email address associated with your login.
- Apply comments and tags.
- Save or export search results if you have the proper permissions.



NOTE: For Exchange systems, Archive Manager archives all Outlook item types except Journal entries (activities). The term "messages," as used in this chapter, may therefore refer to item types other than email messages: calendar appointments, meeting invitations, tasks, task requests, sticky notes, contacts, and personal distribution lists.

Selecting the number of search results displayed

The default number of search results displayed per page is derived from the number set in the Archive Manager Configuration Editor. The Configuration setting *WWW Page Size* can be edited to change the default value.

Exporting your search results

Search results can be exported by clicking **Export** above the search results. This option is available only if you have the appropriate permissions.

Manipulating columns in your search results

Column widths can be resized by dragging the boundary on the right side of the column heading until the column is the width you want.

Sorting your search results

Search results can be sorted by clicking once on the header of the column by which you want to sort. The default sort order is by message date, newest to oldest.

Previewing messages

To preview your search results, click the bar which is displayed to the right of the search results.

The message is shown to the right of the search results in the Archive Manager window. For a message preview, the following tabs are displayed:

- Message
- Comment
- Headers
- Journal Report
- Access History
- Tags

These tabs are explained in the **Tags** section below.

The preview screen displays the following information for each message:

- **From:** Whom the message is from.
- **To:** The persons to whom the message was addressed.
- **CC:** Any persons copied on the message.
- **Subject:** The subject of the message.
- **Sent:** The date and time that the message was sent, based on the computer clock on the sender's computer.



NOTE: RTF messages created with Outlook 2007 that contain embedded graphics may not display the embedded graphics properly in the message body.



A green check indicates that the message is secure and has not been tampered with in any way.



A red X indicates that the message may have been tampered with. Please contact your system administrator for more information.

Viewing messages in the preview window

To open or close a message in the preview window, click on an arrow in the gray sidebar to the right of your search result list.

Some of the actions listed above can also be executed by selecting a message or messages and right-clicking. The action will be executed on all selected messages.

Opening messages

You can double-click a message to open it. Double-clicking a message opens the message in a new window.

If you double-click a message to open it, you can execute the following actions for the message in the View Message window:

- Reply
- Reply to All
- Forward
- Send To Me

The actions listed above require the user to have an email address in Archive Manager. The administrator does not have a default email address, so one needs to be created.

- View Images
- Print
- Click an arrow icon to navigate to the Previous message or the Next message

The actions listed above are defined in the **Toolbar** section below.

Right-Clicking messages in your search results

If you select a message or messages from your search results and then right-click, you can perform the following actions:

- Copy to Folder
- Remove From Folder (if the message is in a custom mailbox)
- View Message
- Add Comment
- Print Message

Previewing attachment history reports

When you click on an attachment, the right-hand pane displays the following information:

- A link with the attachment name that you click on to download the attachment.
- A **Messages** tab that displays all of the messages to which the attachment is linked, and that you have the appropriate permissions to view.
- An **Attachment Aliases** tab that lists all other names associated with the attachment. Multiple names occur due to single instancing. (Any attachment that contains the same content is only archived once, but the individual names are archived.)
- An **Access** tab that displays a log of users that have viewed or downloaded the attachment.

Right-clicking attachments in your search results

If you select an attachment or attachments from your search results and then right-click, the options available when you right-click a message are grayed out.

Using message tabs

Archive Manager provides additional information related to a message. Tabs containing this information are displayed above the body of the message.

Message

The Message tab of the message simply contains the body of the message, displayed in the same format as the original message (either HTML or plain text).

Comment

The **Comment** tab of the message lets you add and view comments related to the selected message.

To add a comment to a message:

- 1 Open the **Add Message Comment** dialog box:
 - Double-click a message to open it, click the **Comments** tab, and click **Add Comment** to display the **Add Message Comment** dialog box
 - Right-click the message in the list and select **Add Comment** from the menu.
- 2 Enter your comments.
- 3 Select whether the comment is private.

- 4 Click **Add** to save your comment and close the dialog box.



NOTE: To close the **Add Message Comment** dialog box without adding a message, click **Close**.

Headers

Message headers provide a list of technical details, such as the message ID, who it came from, the date and the thread index.

These details can be useful for identifying problems with email or identifying sources of unsolicited commercial email messages.

- **Message-ID:** The message has been given this number for identification purposes. This ID number is assigned to the message permanently.
- **From:** Whom the message is from and the sender's email address.
- **To:** The person(s) to whom the message was addressed.
- **Subject:** The subject of an email message.
- **Date:** The date and time that the email message was sent, based upon the computer clock on the sender's computer.
- **Thread-Topic:** The topic for the messages contained in this thread.
- **Thread-Index:** This header is used for associating multiple messages to a similar thread.
- **Content-class:** This is an additional MIME header. It tells MIME-compliant email programs what type of content to expect in the message.
- **MIME-Version:** Specifies the version of the MIME protocol that was used by the sender.

Journal Report

The Journal Report will generally contain the following information:

- **Sender:** Whom the message is from and the sender's email address.
- **Message-ID:** The message has been given this number for identification purposes. This ID number is assigned to the message permanently.
- **Recipients:** The person(s) to whom the message was addressed and their email addresses.

There are two types of journaling:

- **Message-only journaling:** This type of journaling captures all messages from users on a specific Mailbox database and sends the message copy to a specified journaling Mailbox.
- **Envelope journaling:** This type of journaling is available only with Microsoft Exchange. Envelope journaling is different from standard journaling in that it lets you archive P1 message headers (envelope headers). This includes information about the recipients, including BCC recipients and recipients from distribution groups. The journal report is able to contain an expansion of the recipient list for the message only if envelope journaling is configured.

Example: If the original message was sent to the group **all@yourcompany.com**, the journal report will display all individual email addresses within the group **all@yourcompany.com**.

Access History

The **Access History** tab of the message lets you view all users who have accessed the message, in a table that shows this information:

- **Date viewed:** The date and time that the message was accessed

- **Login name:** The login name of the user who accessed the message
- **Display name:** The display name of the user who accessed the message
- **IP Address:** The IP address of the user who accessed the message

The **Exclude Self** checkbox allows you to view message access history from all users except yourself. This option is checked by default. Uncheck this option to view your own access history.

Tags

Tags provide a way of categorizing email messages within Archive Manager. This allows you and your organization to share and access your email data more effectively. At an application level, Archive Manager allows metadata to be assigned to email messages to facilitate the easier location of email data.

To view the tags associated with a message, click **Tags**.

To add a Tag:

- 1 Select a tag type from the drop-down list.
- 2 Enter the value for the tag in the **Value:** box. Exact values will depend on how your Archive Manager system has been configured, but this feature can be used to associate messages with particular projects or job codes, for example.
- 3 Click **Add**. The tag is added to the dialog box above the input fields.

We recommend message tags be added only with the guidance or permission of your system administrator, since these are defined in the Administration area of Archive Manager.

To edit a Tag:

- 1 Locate the tag in the list of tags.
- 2 Click the **Edit** icon to the left of the tag name.
- 3 Enter a new value for the tag and click **Update**.
- 4 The tag is updated and the new information is displayed in the table below the input fields.

To remove a Tag

- 1 Locate the tag in the list of tags.
- 2 Click the **Edit** icon to the left of the tag name.
- 3 Click **Delete**. The **Delete Record** confirmation message is displayed.
- 4 Click **OK** to confirm the deletion. The selected tag is removed, and the **Tag** tab is displayed with the tag removed.

Using the toolbar

Archive Manager provides a set of email client functionality for working with a message after it has been located in the Archive Manager database. A toolbar for working with the message is displayed at the top of the message preview window.

Use the toolbar buttons to perform any of the following tasks:

- **Reply:** Reply to the sender of the message.
- **Reply to All:** Reply to the sender and all other addressee(s) of the message.
- **Forward:** Forward the message to the addressee(s) you specify.
- **Send to Me:** Send the message to the email address associated with your login.

You can use the ellipses button to search for any addresses if you have the **Person Search** security action.

- **View Images:** Display any linked images in the message that may have been suppressed by Archive Manager. This button is visible only for HTML messages, not for text messages.
- **Print:** Print the message using the standard browser printing functionality.
- **Previous:** Moves to the previous message (up) in the page of your current set of search results.
- **Next:** Moves to the next message (down) in the page of your current set of search results.

Reply

To Reply to the sender of the message:

- 1 Click **Reply**. A new message is created in the current window with the following information pre-populated:
 - The email address of the original message sender in the **To:** field.
 - "RE:" followed by the subject line of the original message in the **Subject:** field.
 - The content of the original message as the body of the new message.
- 2 Edit the message as required. You can change any field, including those that are pre-populated.
 - **To:** Add or remove direct recipients of the message.
 - **CC:** Add or remove copied recipients of the message.
 - **Subject:** Modify the subject line of the message.
 - **Message body:** Add or edit the content of the message. You can apply some basic formatting to the content of the message using the toolbar at the top of the message.
- 3 Click **Send**. The message is sent to the specified recipients and a copy is forwarded to the email address associated with your login for audit trail purposes.

Reply to All

To reply to the sender and all other recipients of the message:

- 1 Click **Reply to All**. A new message is created in the current window with the following information pre-populated:
 - The email address of the sender of the original message and any other direct recipients of the message in the **To:** field.
 - The email addresses of any copied recipients of the original message in the **CC:** field.
 - "RE:" followed by the subject line of the original message in the **Subject:** field.
 - The content of the original message as the body of the new message.
- 2 Edit the message as required. You can change any field, including those that are pre-populated.
 - **To:** Add or remove direct recipients of the message.
 - **CC:** Add or remove copied recipients of the message.
 - **Subject:** Modify the subject line of the message.
 - **Message body:** Add or edit the content of the message. You can apply some basic formatting to the content of the message using the toolbar at the top of the message.
- 3 Click **Send**. The message is sent to the specified recipients and a copy is forwarded to the email address associated with your login for audit trail purposes.

Forward



NOTE: For Exchange systems, Archive Manager archives all Outlook item types except Journal entries (activities). Non-email items (other than email messages) can be forwarded from Archive Manager only as non-functional HTML representations of the original items. This restriction applies to:

- calendar appointments
- sticky notes
- meeting invitations
- contacts
- tasks
- personal distribution lists
- task requests

To forward the message to the recipients of your choice:

- 1 Click **Forward**. A new message is created in the current window with the following information pre-populated:
 - "FW:" followed by the subject line of the original message in the **Subject:** field.
 - The content of the original message as the body of the new message.
- 2 Enter the addressee information and edit the message as required. You can change any field, including those that are pre-populated. You must enter at least one email address in either the **To:** or **CC:** field before sending the message.
 - **To:**-Add or remove direct recipients of the message.
 - **CC:**-Add or remove copied recipients of the message.
 - **Subject:**-Modify the subject line of the message.
 - **Message body**-Add or edit the content of the message. You can apply some basic formatting to the content of the message using the toolbar at the top of the message.
- 3 Click **Send**. The message is sent to the specified recipients and a copy is forwarded to the email address associated with your login for audit trail purposes.

Send to Me

To forward the message to the email address associated with your login:

- 1 Click **Send to Me** to create a new message in the current window with the following information pre-populated:
 - The email address associated with your login in the **To:** field
 - "FW:" followed by the subject line of the original message in the **Subject:** field
 - The content of the original message as the body of the new message
- 2 Edit the message as required. You can change any field, including those that are pre-populated.
 - **To:**-Add or remove direct recipients of the message.
 - **CC:**-Add or remove copied recipients of the message.
 - **Subject:**-Modify the subject line of the message.
 - **Message body**-Add or edit the content of the message. You can apply some basic formatting to the content of the message using the toolbar at the top of the message.
- 3 Click **Send**. The message is sent you at the email address associated with your Archive Manager login.

View Images


When a message body is reconstructed in the Archive Manger website, a security risk exists when the message body contains external references such as images or cascading style sheets. The Archive Manager website blocks all references to external resources beginning with *http://* and *https://*, except for hyperlinks.

To view the linked images, click **View Images** in the Toolbar.

Print

To print the message:

- 1 Click **Print** to display the standard Print dialog box associated with your browser.
- 2 Alter any settings as required, and then click **Print** to print the message.

 **NOTE:** For more information on printing from your browser, see the application-specific help topics on printing.

Previous

Click **Previous** to display the previous message (up) in the page of your current set of search results in the View Message window.

Next

Click the **Next** button to display to the next message (down) the page of your current set of search results in the View Message window.

Reconstructing messages using the Archive Manager Outlook Form

The Archive Manager Outlook Form allows the user to reconstruct the stripped message(s) and attachment(s) on the Exchange server using a supported version of Microsoft Office Outlook.

Reconstructing stripped messages with Windows Authentication

Archive Manager Outlook Form automatically reconstructs messages and/or attachments when opened if Windows Authentication is used.

In order for stripped message reconstruction to work, the user must automatically authenticate to the Archive Manager website. The recommended method for doing this is the add the Archive Manager site to the intranet zone, as described in the next section.

Adding the Archive Manager site to the intranet zone



If you open the Archive Manager Site and the **Internet**, **Trusted sites** or **Restricted sites** zone message appears in the status bar (as shown above):

- 1 Run Microsoft Internet Explorer.
- 2 Click **Tools | Internet Options** on the main menu.
- 3 In the **Internet Options** dialog, go to the **Security** tab.
- 4 Select the **Local** intranet zone, and click **Sites**.
- 5 If you are using Microsoft Windows 2003, skip to step 6. Otherwise, in the **Local** intranet dialog, click **Advanced**.
- 6 Specify the Archive Manager URL and click **Add**. Then, click **OK**.
- 7 Back in the **Local** intranet dialog, click **OK**.
- 8 Select the **Local intranet** zone, and click **Custom Level**.
- 9 In the **Security Settings** dialog, go to the end of the security settings list.
- 10 Make sure the **Automatic logon only in Intranet zone** option is selected under **User Authentication | Logon**. If not, select the option.
- 11 Click **OK**.

NOTE: If you are using Internet Explorer 7, adding the Archive Manager web server URL to Trusted sites may still prompt the user for credentials. Adding the site to the Local Intranet Zone will solve this problem if the Archive Manager site URL contains a local domain.

Opening stripped messages from a shared folder

To open stripped messages from a shared folder, the user opening the message from the shared folder must have the **allow scripts in shared folders** option checked in Outlook. The user must also have access to the Archive Manager mailbox of the user sharing the folder.

Reconstructing messages using the Outlook Web App (OWA)

The Outlook Web App is installed through the Download Tools page of the Administration Website. See the [Download Tools](#) chapter of this guide.

To reconstruct messages in the Outlook Web App:

- Double-click a message in the message list to open it. The message will be reconstructed and displayed in the popup window.
- Or,
- In the preview reading pane in non-conversation mode, click the **Reconstruct from Archived** button. The message will be reconstructed and displayed in the reading pane

Standard Mailboxes

- [About standard mailboxes](#)
- [Types of mailboxes](#)

About standard mailboxes

Messages are organized into Mailboxes, mimicking the Mailbox structure of the Microsoft Exchange or Novell GroupWise mail server. In addition, Personal Information Store (PST) files can be loaded into Archive Manager, so Archive Manager can also access messages stored on your local computer.

- ① **NOTE:** If you introduce changes to a PST file after it has been loaded into Archive Manager, these changes are not automatically reflected in Archive Manager. The PST file must be loaded again before new messages stored in the PST file will be displayed in Archive Manager.

Archive Manager uses an agent to scan email messages and dynamically build a folder structure that parallels the folder structure of Mailboxes found on the Microsoft Exchange server or within a PST file. The folders found in the Mailbox or PST file are automatically added to the **Mailboxes** menu in Archive Manager, and can be displayed or hidden by expanding or collapsing the tree structure of the menu.

- ① **NOTE:** When using a mailbox, be aware of the following:
 - For Archive Manager to process the subfolders correctly, make sure their names do not coincide with the system folder names in Exchange or GroupWise. (e.g. Creating "Sent items", "Deleted Items" or "Trash" subfolders under Outlook Inbox/ GroupWise Cabinet might result in issues with folder display in Archive Manager).
 - Because the folder agent is configured by the Archive Manager System Administrator to run at set intervals, if a message is placed into a folder on the Microsoft Exchange server, there may be some delay before the message is displayed in the parallel folder in Archive Manager.
 - Archive Manager does not provide any email management functionality. The management of messages, such as creating Mailboxes or folders or moving messages between Mailboxes or folders must be performed using your email client application.
 - Use extreme caution when deleting folders from the email client. You must allow sufficient time for the folder agent to discover the deletion and synchronize your Deleted Items folder accordingly before you empty the Deleted Items folder.

To display messages stored in a mailbox or in a folder within a Mailbox:

- 1 Navigate to and select the **mailbox** or folder from the **Mailboxes** menu, in the Tools sidebar. A list of the messages in the **mailbox** is displayed.
 - ① **NOTE:** Selecting a mailbox or folder essentially executes a search in Archive Manager. The search criteria used are automatically added to the **Mailboxes** tab of the Email Search form. See the [Mailbox tab](#) section for more options.
- 2 Use the **Email Search** tabs to further refine the search if required.

Types of mailboxes

Archive Manager mailboxes work in a way similar to mailboxes in Microsoft Exchange, Novell GroupWise, or other similar email systems. They can be "real"—associated with a particular email address—or Custom (Virtual) Mailboxes that receive email sent to any of several email addresses or to any email address that contains a particular string. Essentially, Archive Manager provides two types of mailboxes within this area:

Table 1:



NOTE: This is a standard mailbox, which typically corresponds to an individual user's email.



NOTE: This is a more flexible mailbox created to provide access to another user's mailbox. This will appear only if you have been given permission to view their Mailbox.

Email addresses that comprise a custom (virtual) mailbox can be either a combination of a specific individual email address or a wildcard email address, which provides greater flexibility as to which addresses are accessible from the custom mailbox. Enter wildcard email address in the format ***@somecompany.com**.

Security can be assigned to users to allow them to have access to your standard mailbox.

Table 2:



NOTE: The **Mailbox** menu can be collapsed (hidden), by clicking on the arrow icon to the right of the menu heading




NOTE: The **Mailbox** menu can be expanded (un-hidden), by clicking on the down arrow icon to the right of the menu heading.

Custom Mailboxes

- [About custom mailboxes](#)
- [Add a custom mailbox](#)
- [Rename a custom mailbox](#)
- [Delete a custom mailbox](#)
- [Security](#)

About custom mailboxes

Custom Mailboxes let you select and copy messages into custom mailboxes and folders. You can group and copy messages from your personal Archive Manager results and copy these to user-defined mailboxes or folders. This provides the ability to group, for example, project- and customer related messages in a single Mailbox or folder, making investigations and research easier to manage.

-  **NOTE:** There is no limit to the number of custom Mailboxes that you can create, and each one can have its own security settings.

Add a custom mailbox

To add a custom mailbox:

- 1 Click the **New Mailbox** link under the **Custom Mailboxes** section of the Tools sidebar.
- 2 Enter a Mailbox name and click **OK**.

Alternatively, Mailboxes can be created by taking the following steps:

- 1 Right-click an email message and select **Copy to Folder**.
- 2 Click **New Mailbox** in the **Copy to Folder** dialog box, enter a name for the Mailbox, and click **OK**.

Add folders to a custom mailbox

Folders provide extra levels of detail to the custom Mailbox structure and operate in the same way as the folder structures within an email program.

To add a folder to a custom mailbox:

- 1 Right-click the custom Mailbox you want to add the folder to and select **Create Folder**.
- 2 Enter a name for the folder and click **OK**. The folder is created and appears underneath the custom Mailbox.

Add messages to a custom folder

To add messages to a custom folder:

- 1 Search for messages as described in the [Searching Email](#) chapter.
- 2 Select the message(s) you want to copy to the custom Mailbox. Multiple items can be selected as described below.
- 3 Right-click and select **Copy to Folder**.

The **Copy to Folder** dialog box is displayed.

- ⓘ **NOTE:** The Copy to Folder feature is no longer available to users without the Add/Edit Custom Mailboxes security action.

- 4 Choose the folder in the desired Mailbox and click **Copy**.

Selecting multiple items

To select two or more adjacent items, click the first item, then hold down **SHIFT**, and click the last item.

To select two or more nonadjacent items, click the first item, hold down **CTRL**, and click additional items.

- ⓘ **NOTE:** Changing the column that the messages are sorted by can make selecting items easier. For instance, if you want to select all messages that have the same subject, click the column name **Subject** in the title area above the messages. Select the messages you want from the view.

Rename a custom mailbox

To rename a custom mailbox:

- 1 Right-click the custom mailbox name and select **Rename**.
- 2 Enter the new name for the custom mailbox in the **Manage Mailbox** dialog box and click **OK**. The dialog box will close and the screen will refresh, displaying the updated custom Mailbox name.

Delete a custom mailbox

To delete a custom mailbox:

- 1 Right-click the custom Mailbox name and select **Delete**.
- 2 The **Delete Custom Mailbox** confirmation message is displayed.
- 3 Click **OK** to confirm the deletion. The selected custom Mailbox is deleted, and the screen will refresh.

Security

Once Custom Mailboxes have been created, Archive Manager provides the capability of assigning security to them.

Add user access

To give another user access to a custom mailbox:

- 1 Navigate to the desired Mailbox in the **Custom Mailboxes** menu.
 - 2 Right-click the Mailbox in the **Custom Mailboxes** menu, and select **Security** to display the **Security** dialog box.
 - 3 Enter all or a part of a name in the **Find User** field and click **Search**.
 - 4 Click the checkbox(es) next to the user(s) you want to have access to the Mailbox. Multiple users are able to be selected and added simultaneously.
- ① **NOTE:** Although multiple users can be added at once, they must all be displayed on the same page of the list. If you browse to another page, any selections on the current page will be lost.
- 5 Click the **Add to Mailbox** button. The selected user(s) is added to the access list on the left side of the screen and removed from the list on the right side of the screen.
 - 6 Click the **Close** icon to close the dialog box.
- ① **NOTE:** Once you have given another user access to your Mailbox, your Mailbox will appear in his or her list of custom Mailboxes until the access right is removed.

Remove user access

To remove another user's access to a custom mailbox:

- 1 Navigate to the desired mailbox in the **Custom Mailboxes** menu.
- 2 Right-click the Mailbox in the **Custom Mailboxes** menu and select **Security** to display the **Archive Manager Security** dialog box.
- 3 Click the checkbox(es) next to the users whose access you want to remove.
- 4 Click **Remove Access**. The user is removed from the access list on the left side of the screen and replaced in the list on the right side of the screen.
- 5 Click the **Close** icon to close the dialog box.


Reports

- [About reports](#)
- [Storage Statistics report](#)
- [Search Log report](#)
- [Questionable Access report](#)
- [Viewed Messages report](#)
- [My Search Log report](#)
- [Mailbox Scan Status report](#)

About reports

Archive Manager provides a set of reports which can be accessed from within the Archive Manager application. These reports include:

- **Storage Statistics** - Storage-related information on the Archive Manager system.
- **Search Log** - Displays searches performed by Archive Manager users within a specified date range.
- **Questionable Access** - Displays searches conducted by other users on your mail and on others' mail.
- **Viewed Messages** - Displays all messages viewed by a user within a specified date range.
- **My Search Log** - Displays all the searches you have conducted within a specified date range.

 **NOTE:** Only those reports that you have access permissions for will be visible.

Storage Statistics report

The Archive Manager Storage Statistics report provides storage-related information on the Archive Manager system, including the following statistics:

Table 1:

Total Storage Size	The total size of the Archive Manager database and attachment and message stores.
Database Size	The size of the Archive Manager database.
Database Log Size	The size of the Archive Manager database log
Attachment Index Size	The size of the Full Text Index information for attachments.
Message Index Size	The size of the Full Text Index information for messages.
Single Instance Size	The total size of the attachments for which there is only a single instance.
Storage Reduction	The overall percentage reduction in storage size as a result of the single-instance storage.

Table 1:

Number of Attachments	The total number of attachments in the Archive Manager system.
Single Instance Attachments	The number of attachments that are unique (i.e. only a single instance of those attachments has been stored).
Duplicate Attachments	The number of attachments in the system that are duplicates.
Total Messages	The total number of messages in the Archive Manager system.
Attachment Size	The size of the overall attachment store, without taking into consideration the single-instance storage of attachments.

Search Log report

This report provides you with the details of all searches performed using Archive Manager, including the keywords that were searched, the person performing the search, and the date and time of the search.

The search log enables administrators to view searches performed by Archive Manager users within a specified date range.


To run a Search Log report:


- 1 Click **Browse [...]** to the right of the **User** field to display the **Login Search** dialog box.
 - a) Enter a value in the **Login Name** and/or **Display Name** field. (If values are entered in multiple fields, the search results are cumulative, so only contacts that match both criteria will be displayed).
 - b) Click **Search** to execute the search.
 - c) Locate the person in the search results and click the name to add it to the **Login Name** field and close the **Login Search** dialog box.
- 2 Choose one of the following **Search Date** options to specify the date range:
 - **All** (Default) - All viewed messages regardless of date received. This option must be used in conjunction with other criteria, such as search text or recipient information. Attempting to search using only the **All** option will generate an error.
 - **Today** - Messages viewed on the current date.
 - **Yesterday** - Messages viewed on the previous day.
 - **This Week** - Messages viewed within 7 days of the current date.
 - **Last Week** - Messages viewed within 14 days of the current date.
 - **This Month** - Messages viewed on any day of the current month.
 - **Last Month** - Messages viewed on any day of the previous month.
 - **Between** (and related fields) - Messages viewed within a specified period. Use the **Date From** and **Date To** fields to specify the date range to search. Enter each date by selecting it from the pop-up calendar that appears when you click on the drop-down arrow next to the date entry field.
- 3 Choose one option to specify which searches to include:
 - **All** - View all searches
 - **No** - View only the searches in which the **Search All Users** checkbox was not selected
 - **Yes** - Only searches in which the **Search All Users** checkbox was selected
- 4 Once you have specified the report criteria, click **Search** once to execute the search.

Viewing your search results

The search log results are returned in a table, with information in these columns:

- **User:** The name of the user that performed the search.
- **Date:** The date and time that the search was run.
- **Search All:** Whether the search was across all users in the system, or just the standard user(s) to whom the person executing the search had access.
- **IP Address:** The IP address from which the search was executed.
- **Search Criteria:** The search criteria used to perform the search.

 **NOTE:** The search can be re-run to display the results by clicking the magnifying glass icon to the left of the user name.

 **NOTE: Subscribe to RSS** - Receive updates in your RSS reader for new messages that meet the report criteria displayed. The first 100 results are displayed, sorted by date.

Questionable Access report

The Questionable Access report provides information about possible unauthorized access by Archive Manager users.


This feature tracks users given "Search All Emails" privilege but not the "Edit Logins/Mailbox" privilege and who are reading emails from mailboxes which they are not specifically given access to.

These reports do not necessarily indicate unauthorized access to emails, since the access may have been authorized. Rather, the instances of access in the reports are "questionable"- items that can (should) be investigated if desired.

Viewing your search results

When viewing search results, be aware of the following:

- Message results will be displayed based on the specified date criteria
- Column widths can be resized by dragging the boundary on the right side of the column heading until the column is the width that you want
- Messages can be sorted by clicking once on the title of the column you wish to sort by
- To preview a message, click the **Preview** tab on the right side of the screen. With the preview screen open, the only columns visible are Importance, Icons, Attachments, and Subject. Click the **Preview** tab again to close the preview pane.

 **NOTE: Subscribe to RSS** - Receive updates in your RSS reader for new messages that meet the report criteria displayed. The first 100 results are displayed, sorted by date.

Of All Email (by Specific Person) report

Who is Reading Others' Email?

This report provides information to administrators with regard to unauthorized access performed by a specific Archive Manager user, within a specified date range.

To view this report:

- 1 Click **Browse [...]** to the right of the **Login Name** field to display the **Login Search** dialog box.
 - Enter a value in the **Login Name** or **Display Name** field. If values are entered in both fields, only contacts that match both criteria will be displayed.
 - Click **Search** to execute the search.
 - Locate the person in the search results and click their name to add them to the **Login Name** field and close the Archive Manager **Login Search** dialog box.
- 2 Choose one of the following options to specify the date range:
 - **All (Default):** All viewed messages regardless of date received. This option must be used in conjunction with other criteria, such as search text or recipient information. Attempting to search using only the **All** option will generate an error.
 - **Today:** Messages viewed on the current date
 - **Yesterday:** Messages viewed on the previous day
 - **This Week:** Messages viewed within seven days of the current date
 - **Last Week:** Messages viewed within fourteen days of the current date
 - **This Month:** Messages viewed on any day of the current month
 - **Last Month:** Messages viewed on any day of the previous month
 - **Between (and related fields):** Messages viewed within a specified period. Use the **Date From** and **Date To** fields to specify the date range to search. Enter each date by selecting it from the pop-up calendar that appears when you click on the drop-down arrow next to the date entry field.
- 3 Click **Search** to execute the search.

Of My Email (by Anyone) report

Who Else is Reading My Email?

This report lists all the messages that have been viewed by anyone other than yourself within a specified date range.

To view this access report:

- 1 Choose one of the following options to specify the date range:
 - **All (Default):** All viewed messages regardless of date received.
 - **Today:** Messages viewed on the current date
 - **Yesterday:** Messages viewed on the previous day
 - **This Week:** Messages viewed within seven days of the current date
 - **Last Week:** Messages viewed within fourteen days of the current date
 - **This Month:** Messages viewed on any day of the current month
 - **Last Month:** Messages viewed on any day of the previous month
 - **Between (and related fields):** Messages viewed within a specified period. Use the **Date From** and **Date To** fields to specify the date range to search. Enter each date by selecting it from the pop-up calendar that appears when you click on the drop-down arrow next to the date entry field.
- 2 Click **Search** to execute the search.

Viewed Messages report

The details of the messages that are viewed in Archive Manager are logged, so that in addition to determining who has searched for a message, it is possible to track who has opened any of the messages that were found. This ensures the Archive Manager system is being used appropriately and that the privacy of the organization and its staff is maintained.

To view this report:

- 1 Click **Browse [...]** to the right of the **User** field to display the Login Search dialog box.
- 2 Enter a value in the **Login Name** and/or **Display Name** field. (If values are entered in both fields, only contacts that match both criteria will be displayed).
- 3 Click **Search** to execute the search
- 4 Locate the person in the search results and click the name to add it to the **Login Name** field and close the **Login Search** dialog box.
- 5 Choose one of the following options to specify the date range:
 - **All** (Default) - All viewed messages regardless of date received. This option must be used in conjunction with other criteria, such as search text or recipient information. Attempting to search using only the **All** option will generate an error.
 - **Today** - Messages viewed on the current date
 - **Yesterday** - Messages viewed on the previous day
 - **This Week** - Messages viewed within seven days of the current date
 - **Last Week** - Messages viewed within fourteen days of the current date
 - **This Month** - Messages viewed on any day of the current month
 - **Last Month** - Messages viewed on any day of the previous month
 - **Between** (and related fields) - Messages viewed within a specified period. Use the **Date From** and **Date To** fields to specify the date range to search. Enter each date by selecting it from the pop-up calendar that appears when you click on the drop-down arrow next to the date entry field.
- 6 Click **Search** to execute the search.

My Search Log report

This report provides you with a report of all the searches you have conducted within a specified date range. By default, it displays all searches conducted on the current day.

To view this report for a different time period:

- 1 Choose one of the following options to specify the date range:
 - **All** (Default) - All viewed messages regardless of date received. This option must be used in conjunction with other criteria, such as search text or recipient information. Attempting to search using only the **All** option will generate an error.
 - **Today** - Messages viewed on the current date
 - **Yesterday** - Messages viewed on the previous day
 - **This Week** - Messages viewed within seven days of the current date
 - **Last Week** - Messages viewed within fourteen days of the current date
 - **This Month** - Messages viewed on any day of the current month
 - **Last Month** - Messages viewed on any day of the previous month

- **Between** (and related fields) - Messages viewed within a specified period. Use the **Date From** and **Date To** fields to specify the date range to search. Enter each date by selecting it from the pop-up calendar that appears when you click on the drop-down arrow next to the date entry field.
- 2 Click **Search** to execute the search.

Mailbox Scan Status report

The Mailbox Scan Status report contains information about mailbox processing by the Exchange Store Manager (ESM). Available information includes the following:

- **Mailbox Name:** The name of the mailbox being processed by the ESM.
- **Status Start Date:** The start date and time of the last scan.
- **Last Scan Status:** Displays whether the scan was successful or failed.
- **Runs at Current Status:** The number of times the scan was run at the current scan status.
- **Error Text:** If an error exists, an error message is displayed.

Subscribe to RSS

- [Monitoring email with RSS](#)

Monitoring email with RSS

RSS, which stands for Real Simple Syndication, is a standard XML format that Archive Manager uses to monitor email. You specify your search in Archive Manager and click RSS. A unique URL will be generated that will point to the search. If you put this URL into an RSS aggregator, it will perform the search regularly and inform you when new emails that match your search criteria are found in Archive Manager.

- ① **NOTE:** Within Archive Manager, the RSS feeds are linked to with an orange rectangle labeled **RSS**.

To receive notification of any new information that fits your criteria:

- 1 Execute the search.
 - 2 Click **RSS**. The RSS URL and information screen is displayed.
 - 3 Copy the RSS link at the top of the screen and paste it into an RSS aggregator. The aggregator will perform the search and inform you when new emails arrive in Archive Manager that match your search criteria. The first 100 results are displayed, sorted by date..
- ① **NOTE:** Each RSS aggregator works differently, so check your aggregator's documentation for details.

Accessing your Archive From a Mobile Device

- [Overview](#)
- [Searching for messages](#)
- [Viewing the search results](#)

Overview

Web access for mobile devices enables you to search the Mailbox store for messages, and reply to or forward them. After you open the URL for the Archive Manager Web access, the system detects the type of your internet browser and redirects to the corresponding web site which is a reduced analog of the **Email Search** form.



NOTE: Archive Manager supports mobile devices running either of the following:

- Microsoft Windows Mobile 5.0.
- BlackBerry Enterprise Server (BES) 5.0 (32-bit version).
 - BES 5.0 has been tested on a 64-bit OS with 32-bit software. A 32-bit OS is also supported.

Searching for messages

To find the messages using a mobile device complete the following steps:

- 1 Open the Archive Manager Web interface web site with an internet browser.
- 2 Specify the corresponding account credentials.
- 3 Specify the following search options:
 - a) To use the previously saved search options select the query from the **Saved Search** list. The search form values will be set according to the saved query. However, you can modify these values manually, and the search will be performed according current settings of the search form.
 - b) In the **Search for** text-box enter the search query.
 - c) Select the corresponding check-boxes to specify whether to search in the message **Subject, Body** and **Attachment**.
 - d) To find the messages only sent to a specific person specify the recipient's address or username in the **To** field. If multiple values are entered in this field, Archive Manager will look for messages sent to any of the addresses.
 - e) To find the messages only sent from a specific person specify the recipient's address or username in the **From** field. If multiple values are entered in this field, Archive Manager will look for messages sent from any of the addresses.

- f) In the **Mailbox** list, either select the specific Mailbox to search, or leave the default setting to perform the search within all Mailboxes.
- 4 Click **Search**.
- 5 When you finish searching, return to the search page and click **Sign out** at the top of the screen to finish the session.

Viewing the search results

A list of messages matching the search criteria will be displayed, providing information on the sender, subject and the date the message was sent.

To view, reply to or forward the message:

- Click the subject of the desired message to display the message.
- ⓘ **NOTE:** If a mobile device user does a reply, reply all, or forwards a message using the Archive Manager Web site for mobile users, and the recipient views the message in Outlook, any text that was entered on the mobile device is missing from the Outlook recipient's message.

You may then click **Reply**, **Reply to all** or **Forward** to send the message to the corresponding recipients.

To open the message attachment click on the attached file name in the attachments field.

- ⓘ **NOTE:** You can forward messages from the Mobile interface, but cannot edit them before sending.

Dell listens to customers and delivers worldwide innovative technology, business solutions and services they trust and value. For more information, visit www.software.dell.com.

Contacting Dell

Technical support:

[Online support](#)

Product questions and sales:

(800) 306-9329

Email:

info@software.dell.com

Technical support resources

Technical support is available to customers who have purchased Dell software with a valid maintenance contract and to customers who have trial versions. To access the Support Portal, go to <https://support.software.dell.com/>.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. In addition, the portal provides direct access to product support engineers through an online Service Request system.

The site enables you to:

- Create, update, and manage Service Requests (cases)
- View Knowledge Base articles
- Obtain product notifications
- Download software. For trial software, go to [Trial Downloads](#).
- View how-to videos
- Engage in community discussions
- Chat with a support engineer

Third-party contributions

This product contains the third-party components listed below. For third-party license information, go to <http://software.dell.com/legal/license-agreements.aspx>. Source code for components marked with an asterisk (*) is available at <http://opensource.dell.com>.

Table 1. List of third-party contributions

Component	License or acknowledgement
AJAX Control TookKit 4.1.60501	Copyright © 2009 CodePlex Foundation License: New BSD License (BSD)
Angular.js 1.2.12	Copyright © 2010-2014 Google, Inc. License: MIT
Backbone.js 1.0.0	Copyright © 2009-2012 Jeremy Ashkenas, DocumentCloud Inc. License: MIT
background-size-polyfill 0.2.0	Copyright © 2012-2013 Louis-Rémi Babé License: MIT
CFileVersionInfo 1	Copyright © 2003 Armen Hakobyan License: Code Project Open License (CPOL) 1.0.2
Dell License Validator 1.1	Copyright © 2003 Armen Hakobyan License: Code Project Open License (CPOL) 1.0.2
HTML Agility Pack 1.3.1.0	Copyright © 2003-2005 Simon Mourier License: Creative Commons 2.5
jCarousel 0.2.8	Copyright © 2006 Jan Sorgalla License: MIT
jQuery 1.4.2	Copyright © 2010, John Resig License: MIT
jQuery 1.5.1	Copyright © 2011, John Resig License: MIT
jQuery 1.8.2	Copyright © 2012 jQuery Foundation and Other Contributors License: MIT
jQuery 1.11.1	Copyright © 2005, 2014 jQuery Foundation, Inc. and other contributors License: MIT
jQuery UI 1.8.12	Copyright © 2011 AUTHORS.txt License: MIT
jQuery UI 1.10.3	Copyright © 2013 jQuery Foundation and other contributors License: MIT
jQuery-Placeholder 2.0.7	Copyright © Mathias Bynens License: MIT
jquery.qtip 1.0.0-rc3	Copyright © 2009 Craig Thompson License: MIT
Json.NET 4.5	Copyright © 2007 James Newton-King License: MIT
Log4Net 1.2.10	Copyright © 2004-2011 The Apache Software Foundation License: Apache 2.0
Lucene.Net 2.9.2	Copyright © 2006 The Apache Software Foundation License: Apache 2.0
MD5 1.0	Copyright © 1991-2, RSA Data Security, Inc. Created 1991. All rights reserved License: RSA MD5C.C 1991-2 Portions derived from the RSA Data Security, Inc. MD5 Message-Digest Algorithm
MAPI33.Net 5	Copyright © 2003 - 2005 Sergey Golovkin. All Rights Reserved. License: MAPI33.Net 1

Table 1. List of third-party contributions

Component	License or acknowledgement
NetApp Data ONTAP 4.0	Copyright © 2003-2005 Network Appliance, Inc. License: NetApp Manageability SDK 04-29-11
RegistryMonitor 1.0	Copyright © 2005 Thomas Freudenberg License: Thomas Freudenberg RegistryMonitor
RestSharp 104.1	Copyright © 2010 John Sheehan License: Apache 2.0
Select2 3.4.8	Copyright © 2012 Igor Vaynberg License: Apache 2.0
spin.js 1.2.4	Copyright © 2011 Felix Gnass License: MIT
Submodal 1.5	Copyright © 2008 Seth B, Subimage LLC License: MIT
TinyXml 2.5.3	Copyright © N/A License: zlib/libpng license 1.0 This product contains portions of the PAWN scripting software (formerly known as SMALL).
Twitter Bootstrap 2.0.3	Copyright © 2012 Twitter, Inc. License: Apache 2.0
ui-select2 0.0.5	Copyright © 2012 the AngularUI Team License: MIT
Underscore.js 1.3.1	Copyright © 2009-2012 Jeremy Ashkenas, DocumentCloud Inc. License: MIT
Underscore.string 2.0.0	Copyright © 2010 Esa-Matti Suuronen License: MIT