

Metalogix® Archive Manager for Exchange 8.4

Outlook Add-in User Guide



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Legend



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



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

Metalogix® Archive Manager for Exchange

Updated June 2021

Version 8.4

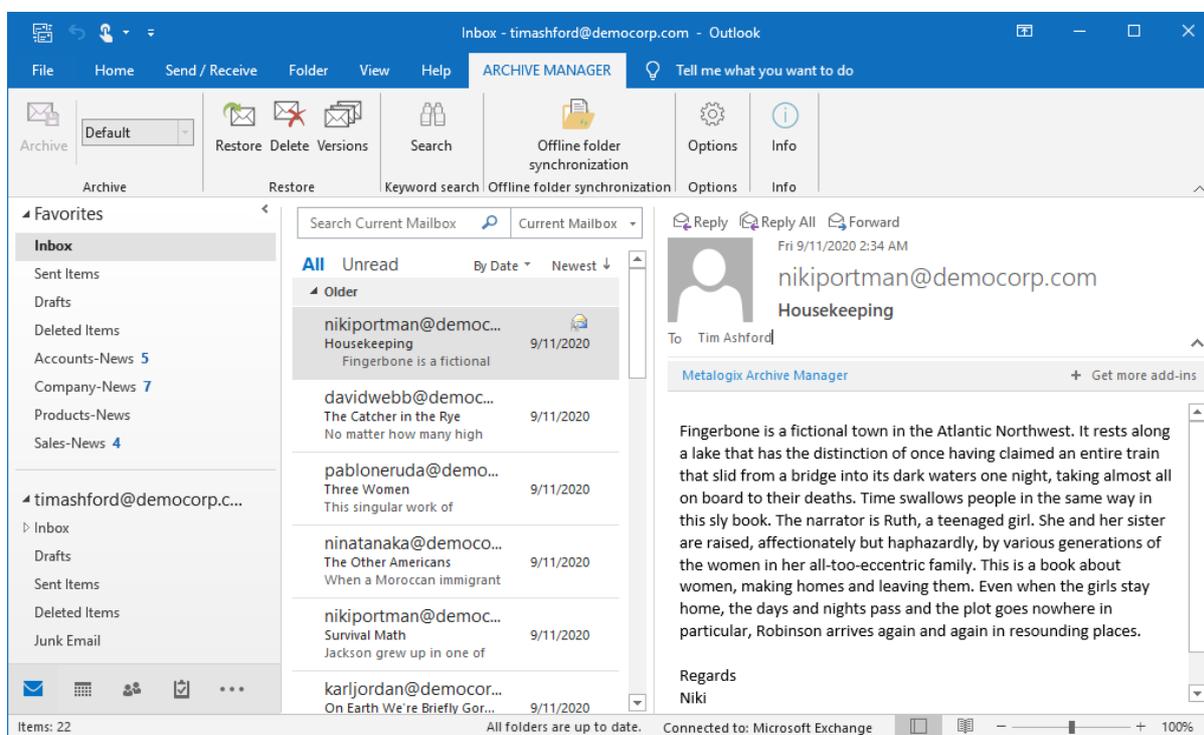
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Introduction

The Metalogix Archive Manager Outlook Add-in offers end users the capability to archive, retrieve, restore and search for archived email items directly from the Outlook client installed on their computers. This guide describes the all these features and other capabilities of the Outlook Add-in.

When the Outlook Add-in is installed, the **Archive Manager** tab appears in the Outlook toolbar. The various functions available in the toolbar ribbon are shown in the illustration below. For more information about the installation and permission settings that control the functions in the ribbon, see the *Metalogix Archive Manager for Exchange 8.4 Outlook Add-in Installation Guide*.



When email items are archived, special icons are used to indicate the nature of the archived email item as described in the table below:

Icon	Description
	Archived e-mail. A bold font indicates that the email is archived and unread.
	Archived email that has been replied.
	Archived email that has been forwarded



NOTE: When you open Outlook for the first time after installing the Archive Manager Outlook Add-in, it will take longer than usual because the Add-in is loaded and configured automatically. When you open Outlook the next time, the interval will be shorter. The Archive Manager toolbar is also listed in the **File > Options > Customize Ribbon** window. All Outlook Add-in actions are logged to a log file located in the `%AppData%\Metalogix Software\Archive Manager\Log\Archive Manager` folder.

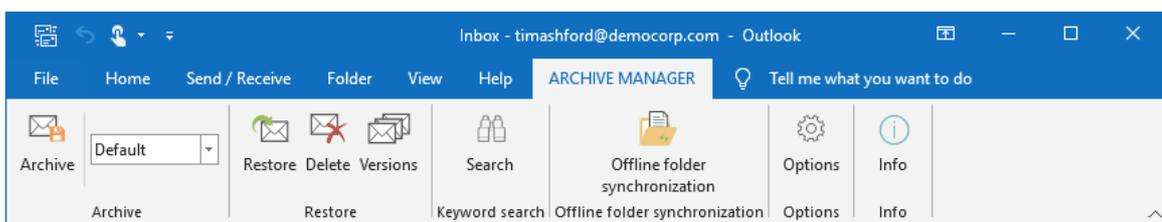
Outlook® is a registered trademark of Microsoft Corporation. All features of the Archive Manager Outlook Add-in are valid of Outlook 2013 and later.

Archiving emails

You may choose to archive several e-mails or documents at once. When archived, emails will be residing in the archive until its retention time elapses. The archived email can be even deleted from Outlook, however, it will be still accessible e.g. via keyword search.

Steps to archive emails

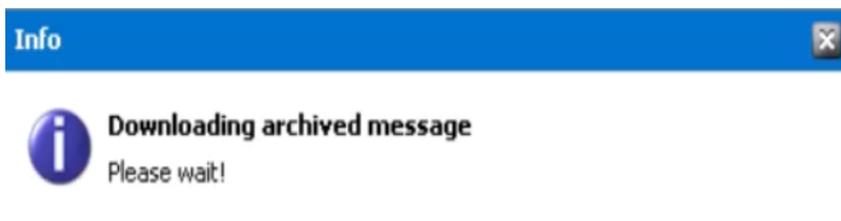
1. Click the **Archive Manager** addin.
2. Select one or more emails and click **Archive** from the ribbon. You can also archive emails and documents from the *Public Folders* folder if you have the appropriate permissions which can be assigned in Archive Manager for Exchange Administration Center (AMAC).



3. Choose a retention category from the adjoining drop-down box, which will be used when archiving the selected emails. The retention category defines the period to retain archived emails, whether the shortcut should be created and more. For more information on retention categories see the *Archive Manager for Exchange Administration Guide*.
4. During the archiving process the *Progress* box opens.



5. After an email is archived it can be retrieved and opened by double-clicking the archived email. It can take some time while Outlook retrieves the emails from the archive and you might see the following popup window.

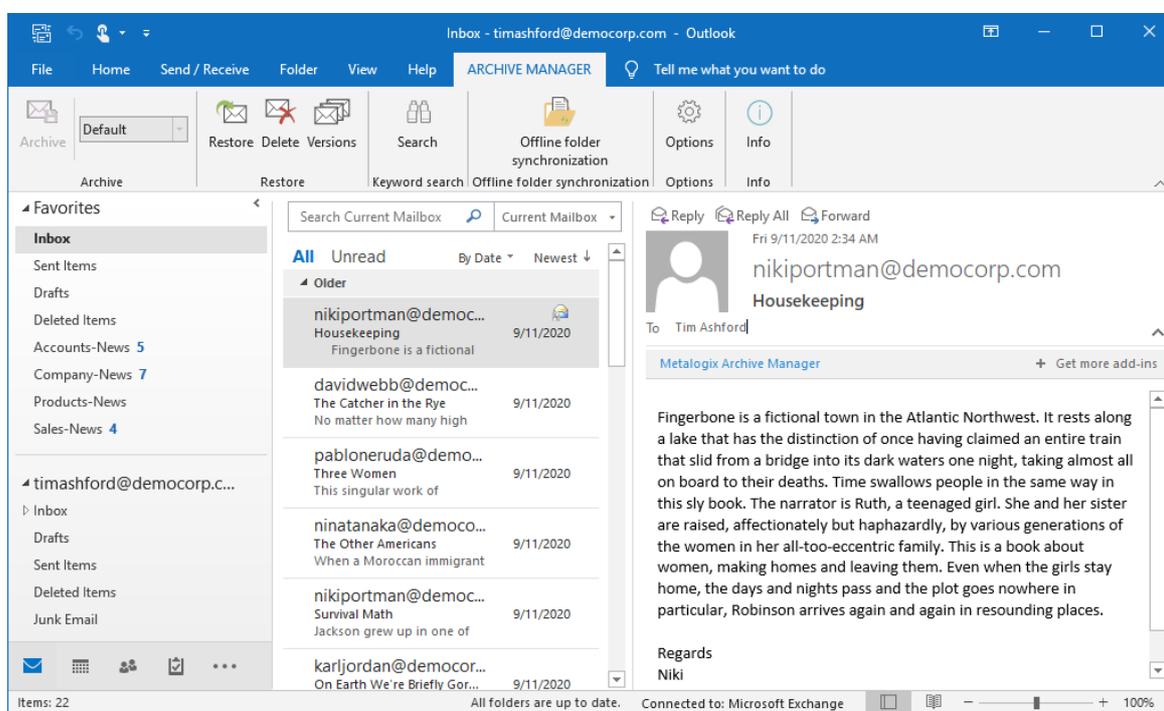


Restoring archived emails

Archived emails can be restored from the Archive Manager Outlook addin.

Steps to restore archived emails

1. Click the **Archive Manager** addin.
2. Select one or more archived emails and click **Restore** from the ribbon.

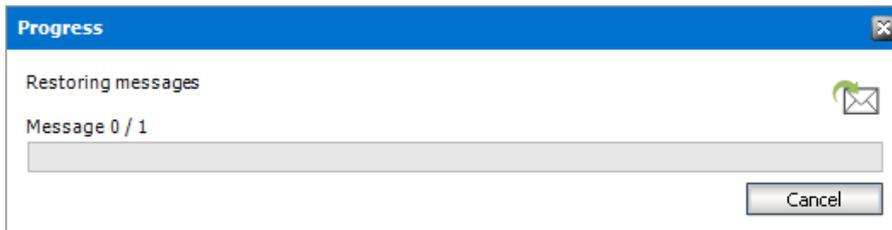


3. Click Restore in the *Restore messages* window that opens.



4. **Delete from archive** - select this check box to mark the selected emails in the archive for deletion. They will be deleted from the archive when their retention period expires. However, it is still possible to find these archived emails with the [Search](#) feature until they are physically deleted from the archive when their retention period expires. If the check box is not checked, the emails will be restored but will not be marked for deletion from the archive. The shortcuts of the email will be replaced on the MS Exchange Server with the original email.

5. When the restoration starts the Progress window opens.



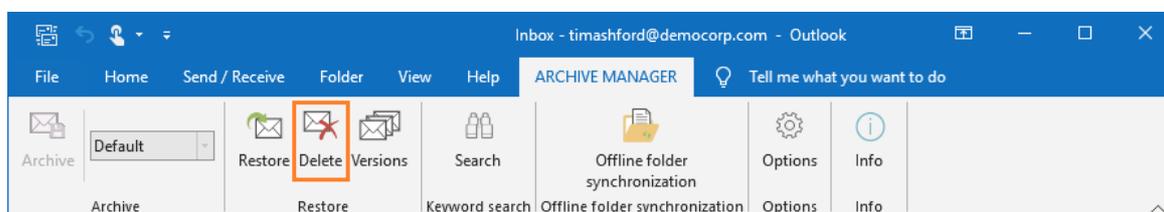
- i** **NOTE:** If you delete archived emails from your mailbox using the Outlook's Delete action, it is still possible to find them with the Archive Manager addin Search feature. However, only the Archive Manager administrator can restore them back into the mailbox.

Deleting archived emails

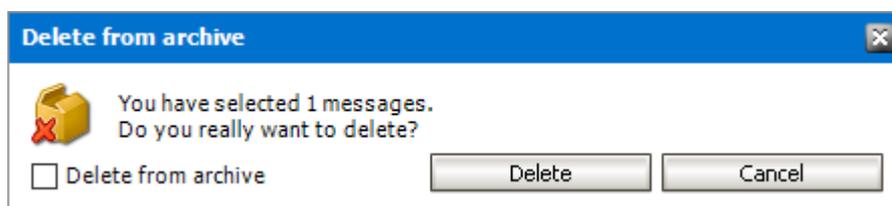
With this menu option the archived e-mails are deleted from the Exchange Server. They can also be marked for deletion from the archive and consequently, they will be deleted when the retention period expires.

Steps to delete archived emails

1. Click the **Archive Manager** addin.
2. Select one or more archived emails and click **Delete** from the ribbon.



3. In the *Delete from archive* window, click **Delete**.



4. By not selecting the **Delete from archive** check box only the email shortcut will be deleted from the Exchange Server. However, the email will not be marked for deletion in the archive and the email is displayed as lost in the Archive Manager Administration Center (AMAC). It can be restored by the administrator during its retention period or until the Shortcut synchronization job runs. For more information see the *Metalogix Archive Manager for Exchange Administration Guide*.

Search

In this chapter:

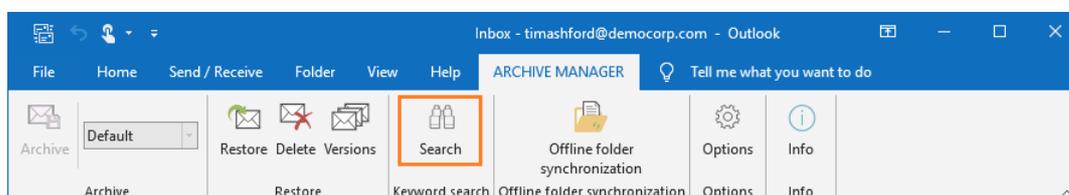
- [Keyword Search](#)
- [Advanced Search](#)

Keyword Search

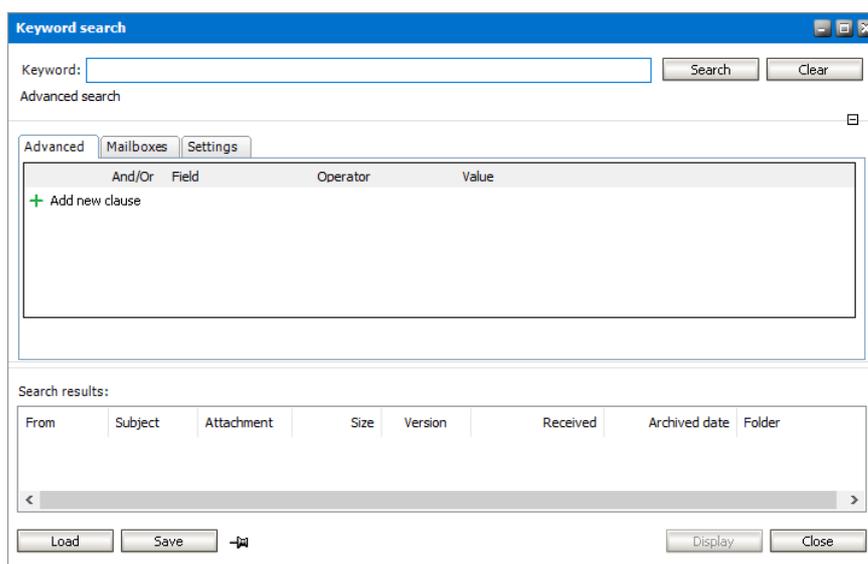
Keyword search is used for searching through archived emails and attachments. It is possible to search for text in pictures (OCR search) although this technology has some limitations. For example, tiny text may not be correctly recognized. Keyword search can be used for searching through archived and subsequently restored mails.

Steps to run a keyword search

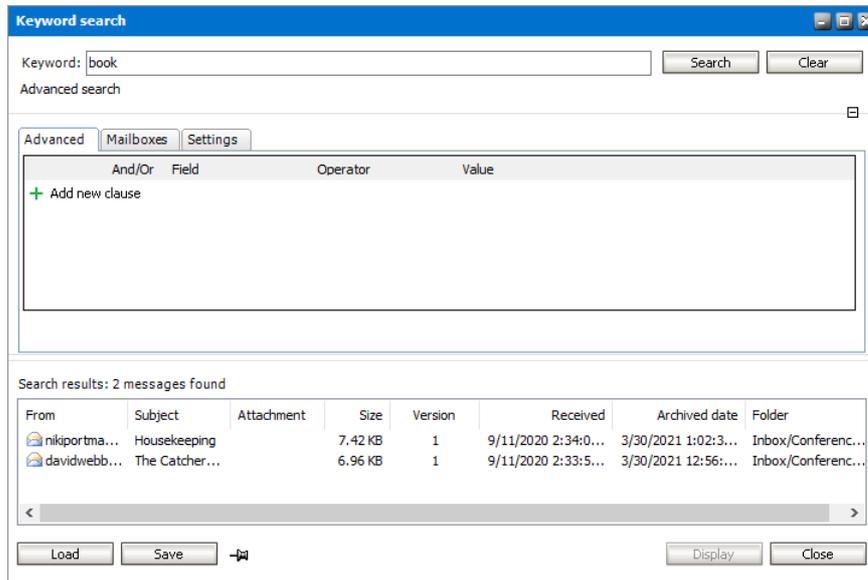
1. Click the **Archive Manager** addin.
2. Click **Search** from the ribbon.



3. The **Search** window opens.



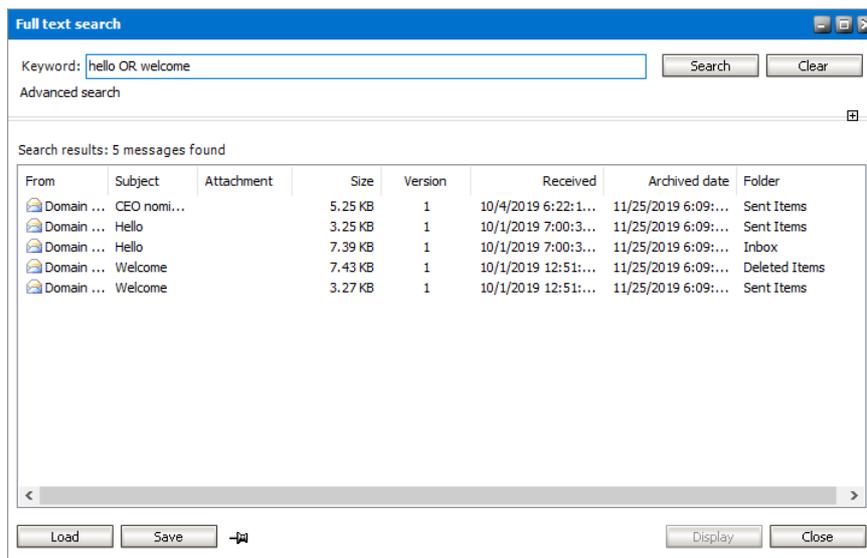
4. Enter the keywords in the **Search for the word(s)** field. The keyword is searched in the subject, email body and attachments.
5. The result of the search is then displayed in the *Search results* window.



6. From the the *Search results* window, you can retrieve an archived email by either selecting the email and clicking **Display** or by double-clicking the email.

Search Expressions

Search expressions are a combination of keywords and logical operators that enhance the search capability. Keywords can be used in combination with the logical operators AND, OR. The operator AND is not mandatory. If no logical operator is included, the keyword search query engine searches for documents containing all the given words.



Example 1:

Search results for `hello AND welcome` are the same as search results for the string `hello welcome` or `welcome hello`. When you intend to look for an exact phrase (a group of words that functions as a single unit in the syntax of a sentence) you should use quotation marks "".

Example 2:

Archive Manager Search supports other operators: NOT, + and -. Single and multiple character wildcard searches are supported as well:

Character	Description	Example
?	single character wildcard; replaces any single character	te?t matches text, test etc.
*	multiple character wildcard; replaces 0 or more characters	test* matches test, tests, tester etc.
+	requires that the term after the "+" symbol exist somewhere in a the field of a single document	+test data searches for documents that must contain "test" and may contain "data"
NOT	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 Note: The NOT operator cannot be used with just one term. For example, the following search will return no results: NOT "test server".	"test data" NOT "test server" searches for documents that contain "test data" but not "test server"
-	excludes documents that contain the term after the "-" symbol	"test data" -"test server" searches for documents that contain "test data" but not "test server"

i **NOTE:** The above mentioned wildcard specification characters, i.e. ? or * etc., cannot occur as first 2 characters of the search phrase. The search query as such cannot other contain special characters as ":", "\", "!", "^", "~".

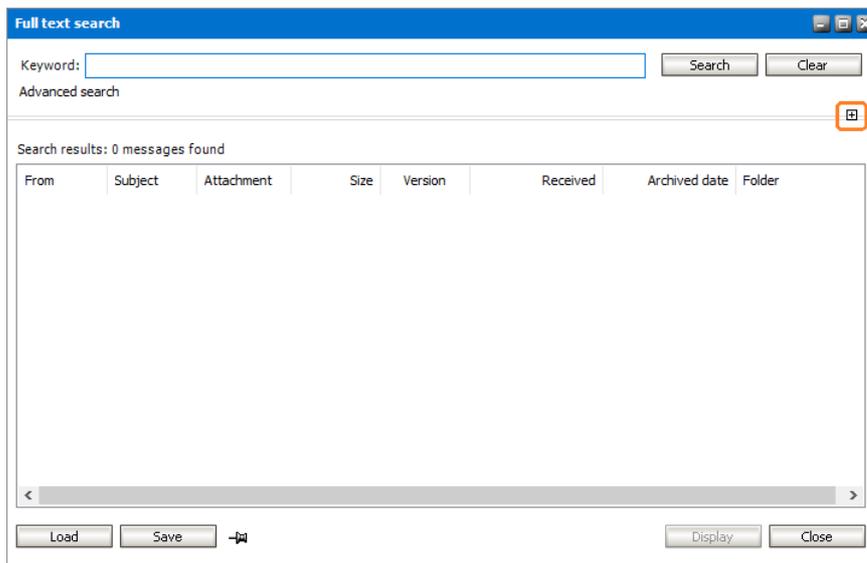
You can use the Save / Load buttons to save / load search criteria you have specified. It is especially useful e.g. when you have set special settings for Advanced search (see further).

Advanced Search

Advance search lets you specify your search criteria in more detail.

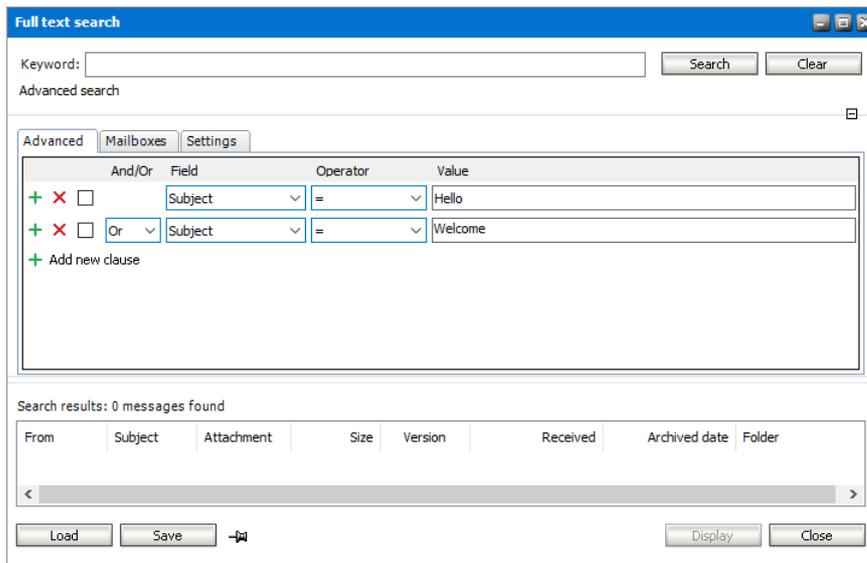
Steps to use advanced search

1. Click the plus (+) sign to expand the advanced search section.



2. Click the **Advanced** tab.
3. Click **Add new clause** and enter the search criteria using the fields as described below:
 - a. **Field** - click the drop down to select the property of the email to be searched. For example, select Subject as the field to search.
 - b. **Operator** - click the drop down and select a search operator.
 - c. **Value** - Specify the search text. If the selected Field requires a date value, a date picker icon appears to help you choose a date. This field supports wildcard characters.
4. To add more criteria clauses, click **Add new clause** or **+**. To remove a clause click **X**. You can additionally select the logical operator. The default operator is **And**.

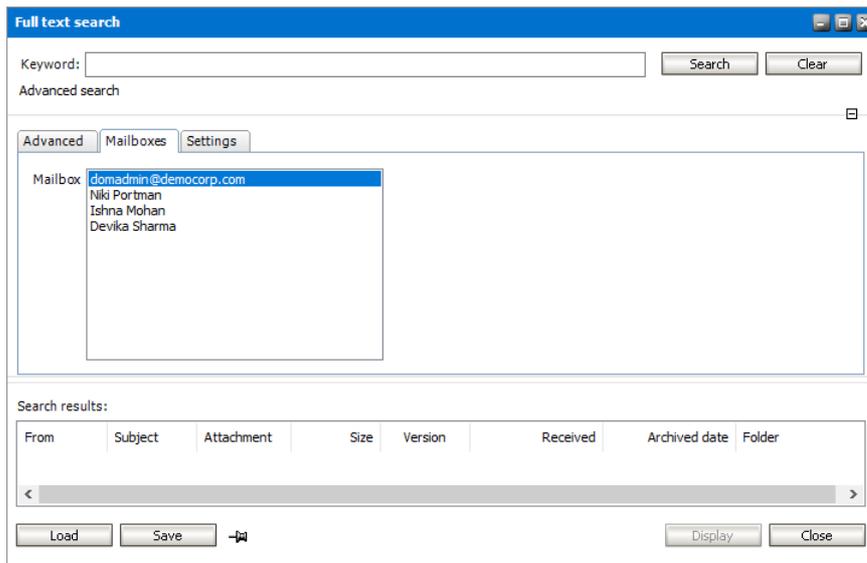
i | **NOTE:** You can group clauses to create nested search criteria by selecting consecutive check boxes and clicking the  icon.



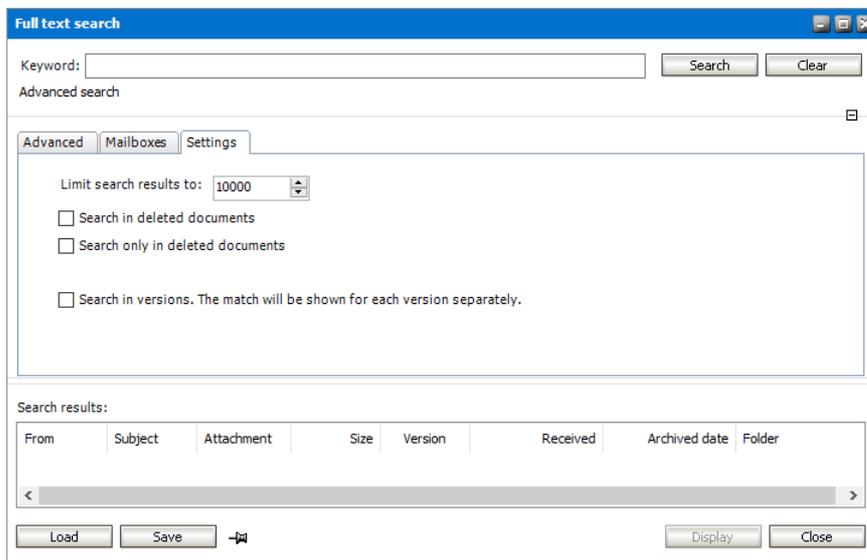
5. To view the scope of the search on mailboxes, click the **Mailboxes** tab. By default only the current mailbox is added. You must select more mailboxes manually if you want to search additional mailboxes.

i NOTE: If you do not see additional mailboxes, the Administrator must follow the steps below to expand the search scope to more mailboxes:

- a. Open the Address Book Manager in the Archive Manager for Exchange Administration Center (AMAC).
- b. Click **Mailboxes** to open the list of mailboxes.
- c. Right-click the mailbox you want to add and select **Permissions** from the context menu. The *Mailbox rights* window opens.
- d. Click **Add** and select the Outlook user who will run the search. Then click **OK** to close the windows.
- e. Open the Advanced search window again and click the **Mailboxes** tab to view the additional mailboxes

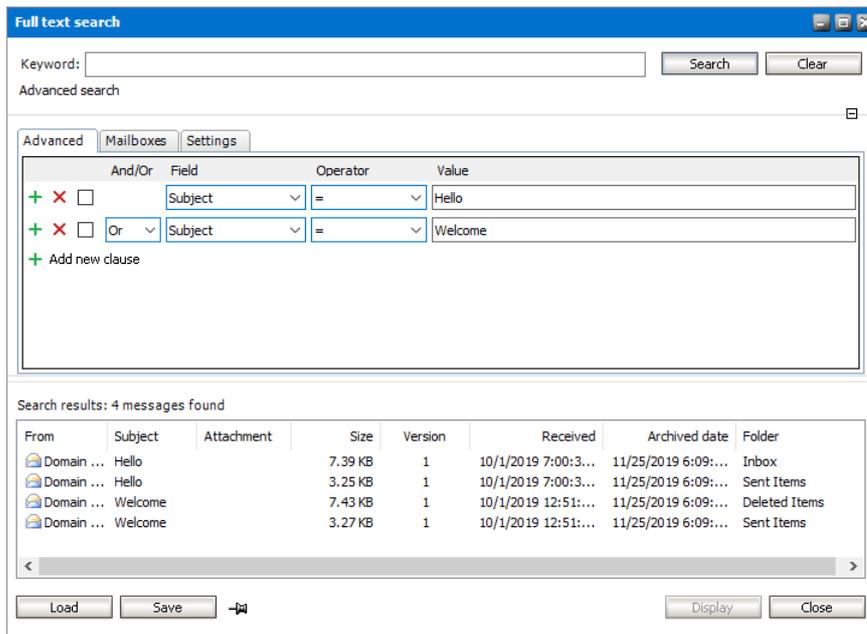


6. To set the search scope on email item types, click the **Settings** tab.



Configure the settings as described below:

- a. **Limit search results to** - the number of emails that are returned in the search result list.
 - b. **Search in deleted documents** - select this check box to search through emails that are marked for deletion and the latest version of archived emails.
 - c. **Search only in deleted documents** - select this check box to exclusively search through emails that are marked for deletion. All other archived emails will be ignored.
 - d. **Search in versions** - select this check box to search through all versions of the archived emails and each match will be returned in the result list.
7. Click **Search** to search for archived emails based on the selection criteria, the mailboxes specified and the settings that are applied.



- Click **Save** to save the search criteria as an XML file. The saved search criteria does not include the list of mailboxes used in the search scope. Click **Load** to load a previously save search criteria.

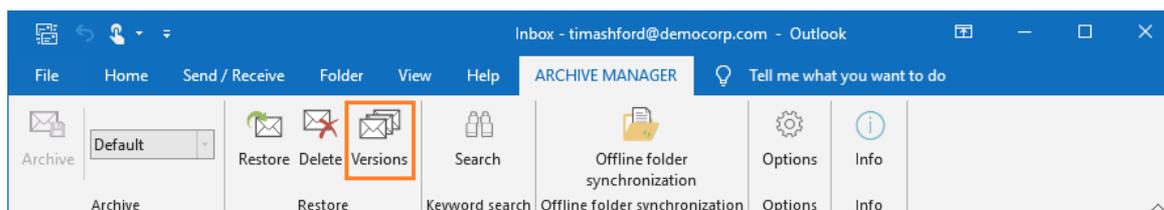
Versions

Each time you retrieve and edit an archived email a new version of that email is created in the HSM Store. Versions are also created automatically when Archive Manager is configured to create a delayed shortcut. For example if you have an email that is archived with a delayed shortcut, the original email is still available in you mailbox even though it is marked to be archived. If you edit and save this this email and it is eventually archived, a new version of the email will be created.

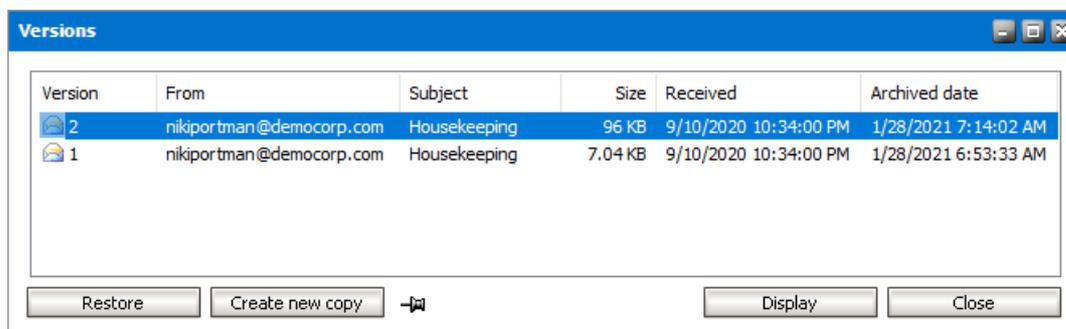
Different versions of an archived email can be checked in the *Versions* window.

Steps to work with the Versions window

1. Click the **Archive Manager** addin.
2. Select an archived email and click **Versions** from the ribbon.



3. If the archived email has versions, then all the versions will be displayed in the list.



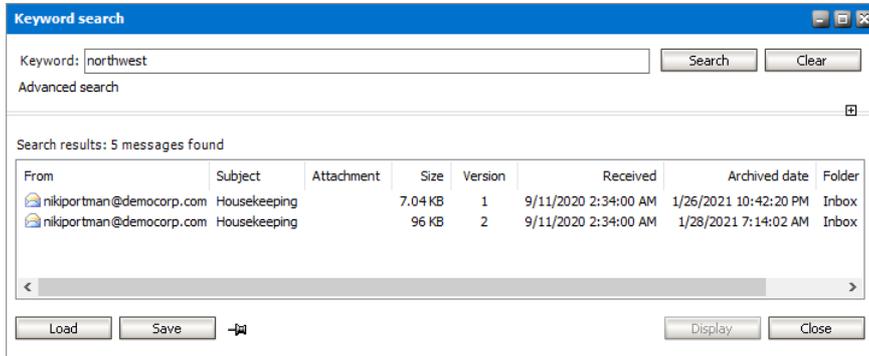
The actions you can perform in the Versions window are described below:

- a. **Display** - opens the selected version of the archived email.
- b. **Create new copy** - creates a new email based on the selected version. This newly created email is not archived and you must archive it manually.
- c. **Restore** - restores the selected version. The restored version of email will be retrieved and deleted from the archive.
- d. **Pin icon** - click the pin icon to keep the *Versions* window always on top while you work with other applications. Click to unpin the window.



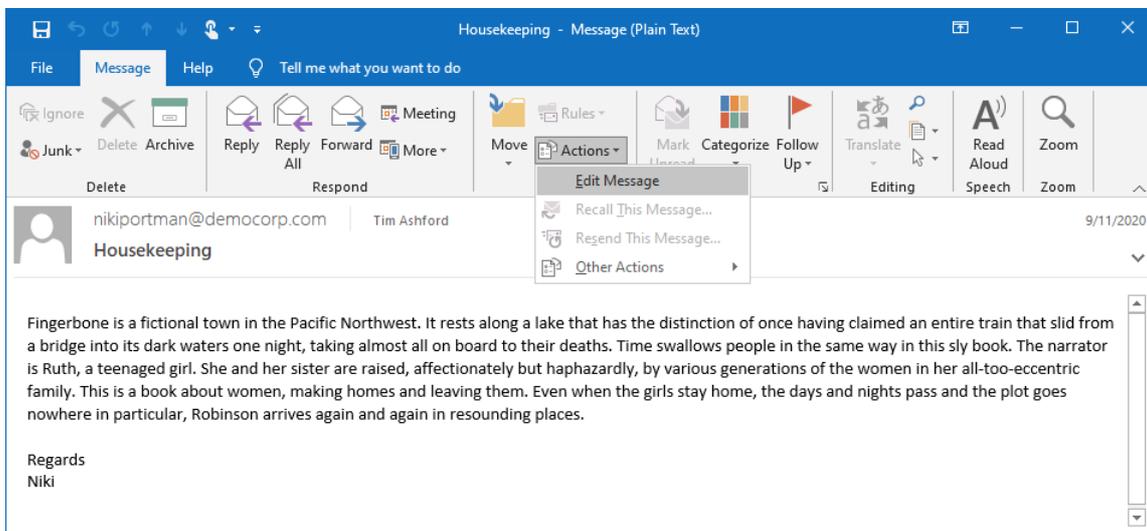
NOTE:

- You can click any column header to sort the list based on the header.
- The keyword search engine searches for keywords in every version of the archived emails. Search results may contain more than one version of the same email.



Steps to create a new version of an archived email

1. Open Outlook.
2. Double-click an archived email to retrieve and open the email in the Outlook message editor.
3. From the **Message** ribbon select **Actions > Edit Message**.



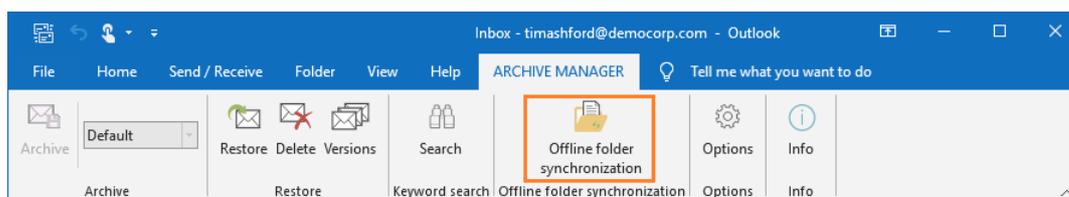
4. Revise the message as needed and save the message.
5. Click the **Archive Manager** addin.
4. Select the edited archived email and click **Versions** from the ribbon to verify that a new version was created and successfully archived.

Offline synchronization

Working with archived emails is possible even when you use your MS Exchange Server mailbox offline. Before switching to offline mode you must synchronize your Outlook mailbox with the MS Exchange Server. If you also plan to work with your archived emails you must synchronize with the Archive Manager addin as well. For automatic synchronization see [Offline options](#).

Steps to synchronize archived emails for offline use

1. Run Outlook synchronization.
2. Click the **Archive Manager** addin.
3. Click **Offline Folder Synchronization**.



4. When you reconnect with MS Exchange Server online, you must synchronize your Outlook mailbox with the MS Exchange Server. Then you must synchronize your Outlook mailbox with the Archive Manager Server as well to update your Outlook mailbox with the current state of all archived messages from the MS Exchange Server.

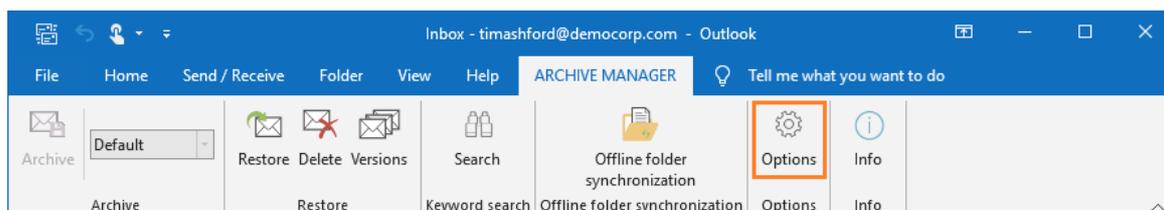
Options

In this chapter:

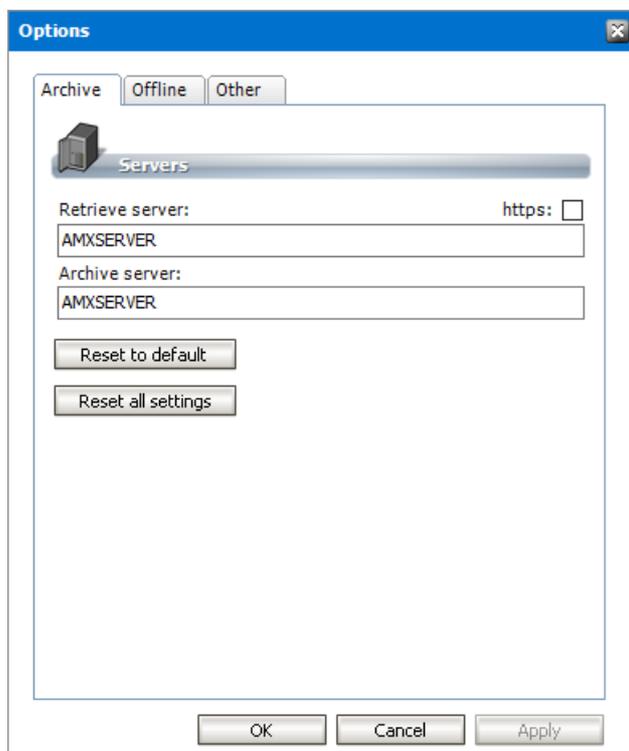
- [Archive options](#)
- [Offline options](#)
- [Other options](#)

Archive Options

1. Click the **Archive Manager** addin.
2. Click **Options** to open the *Options* window.



3. Click the **Archive** tab.

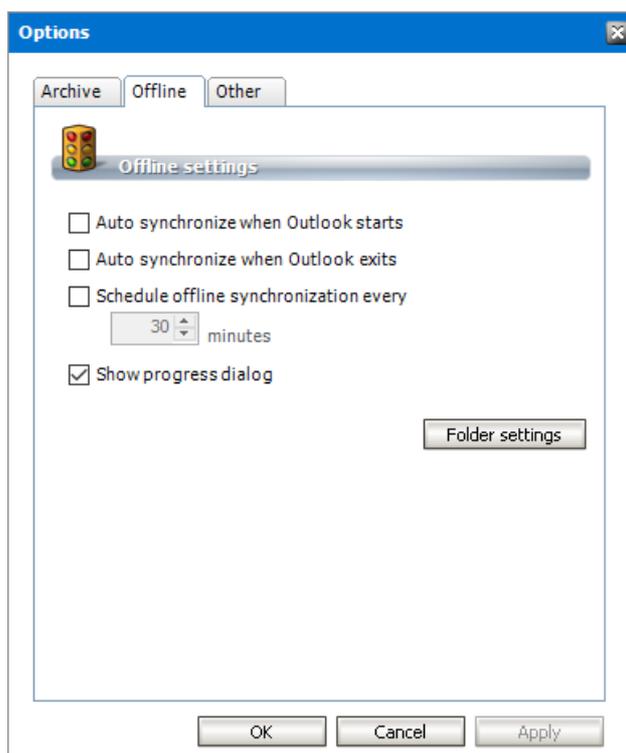


The properties are as described below:

- a. **Retrieve server** - the Archive Manager server that is designated as the *Retrieve* server in a distributed deployment. In a standalone deployment, the Archive and the Retrieve servers are the same.
- b. **Archive server** - the Archive Manager server that is designated as the *Archive* server in a distributed deployment. In a standalone deployment, the Archive and the Retrieve servers are the same.
- c. **https** - select this check box if the communication protocol with the Archive and Retrieve servers uses the secure *https* protocol.
- d. **Reset to default** - Archive and Retrieve server values are reset to default values specified during the addin installation.
- e. **Reset all settings** - all settings across all tabs will be reset to default values.

Offline options

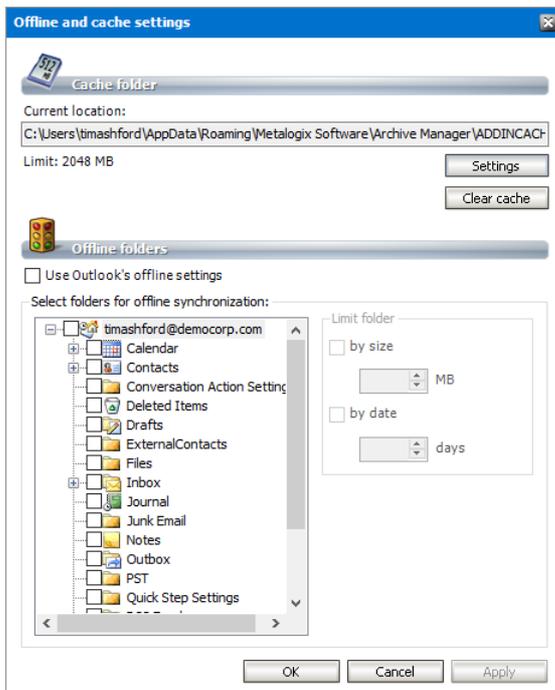
1. Click the **Archive Manager** addin.
2. Click **Options** to open the *Options* window.
3. Click the **Offline** tab to configure automatic offline synchronization.



The properties are as described below:

- a. **Auto synchronize when Outlook starts** - select this check box to synchronize the Outlook client with the Exchange server when Outlook starts.
- b. **Auto synchronize when Outlook exits** - select this check box to synchronize the Outlook client with the Exchange server when Outlook exits.

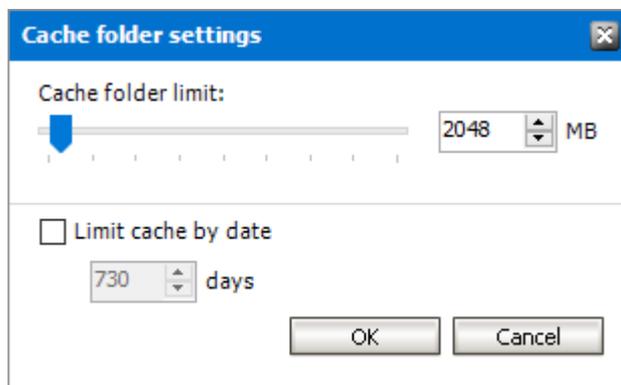
- c. **Schedule offline synchronization every** - select this check box to schedule offline synchronization and specify the frequency in minutes. This is a useful option if network interruptions are expected.
 - d. **Show progress dialog** - select this check box to display the progress dialog whenever the scheduled offline synchronization runs.
4. Click **Folder settings** to open the *Offline and cache settings* window where you can manage the addin cache and specify cache settings for each mailbox folder of the Outlook user.



The properties and actions are as described below:

Cache folder

- a. **Current location** - indicates the location of the cache folder.
- b. Click **Settings** to open the *Cache folder settings* window. Here you can set the global size limit OR the global date limit for the cache folder. (Do not forget to check the Limit cache by date check box if you want to apply the date limit.)



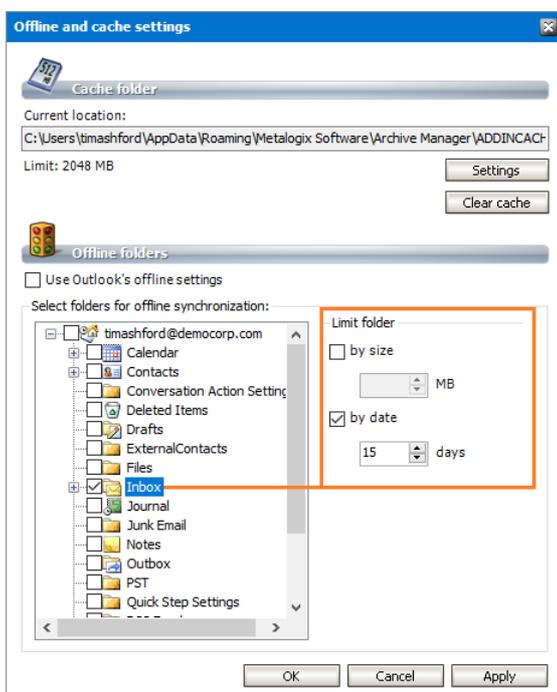
Set the cache limits as described below:

i | **NOTE:** When reducing the cache size or date limit, the add-in will ask if you want to delete the oldest items if the actual status of the cache exceeds the defined values.

- i. **Cache folder limit** - drag the slider to set a size limit for the cache folder or set the limit directly in the size counter. Size limits are defined in MB.
 - ii. **Limit cache by date** - select this check box to set the number of days the cache contents will be retained. If this check box is checked the **Cache folder limit** is ignored. For example, emails older than 730 days will not be cached during offline folder synchronization. The user working offline will be able to see the shortcuts of all archived emails but will be able to work with only those emails that were received in last 730 days.
 - iii. Click **OK** to save the cache limit settings.
- c. Click **Clear cache** to clear the cache folder.

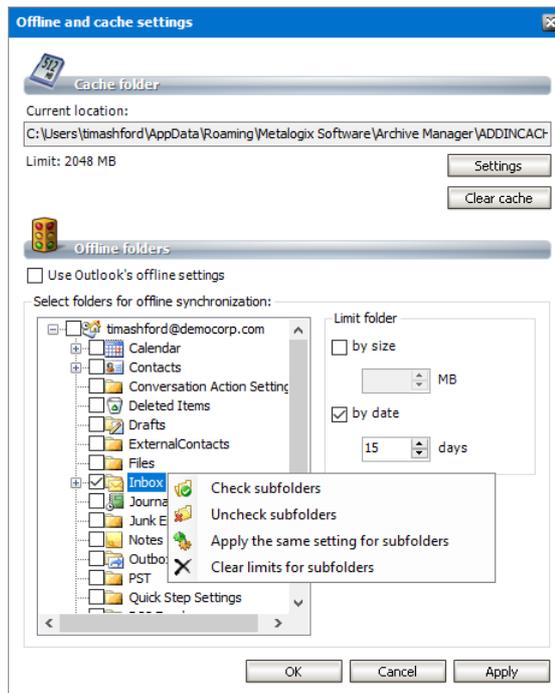
Offline folders

- a. **Use Outlook's offline settings** - select this check box to allow the add-in to synchronize folders that are defined in the Outlook settings. Clear this check box to customize cache limits for selected folders.
- b. Custom limits for selected folders. The custom cache size and date limits defined for individual folders are applicable only within the range of the global limits specified in the *Cache folder* settings section as described above.



To set the cache size and limits:

- i. Select a folder.
- ii. In the *Limit folder* area for the selected folder, select the check box for the cache size or date or both, and set the limits.

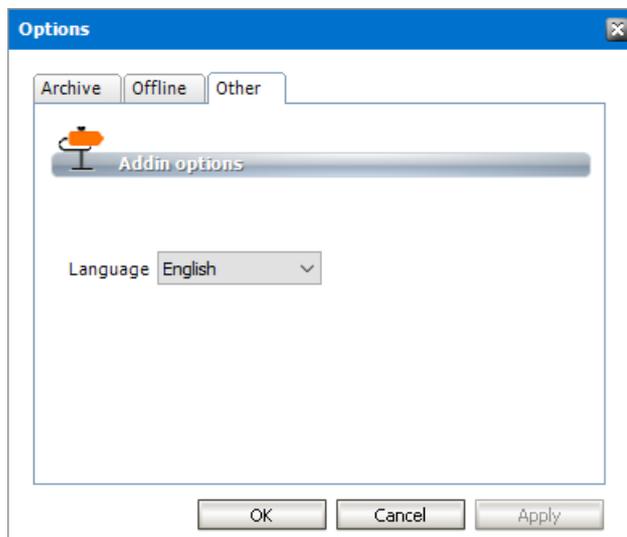


iii. To manage subfolders right-click a folder to select the options in the context-menu. For example, if you set the date limit to 15 days for the *Inbox* folder and select the **Apply the same settings for subfolders** option from the context menu then the same date limit is set for every *Inbox* subfolder.

5. Click **OK** to save the settings and close the *Offline and cache settings* window.

Other options

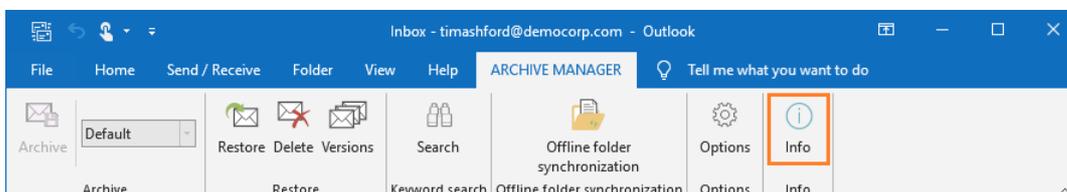
1. Click the **Archive Manager** addin.
2. Click **Options** to open the *Options* window.
3. Click the **Other** tab.
4. Choose the preferred language for the addin.



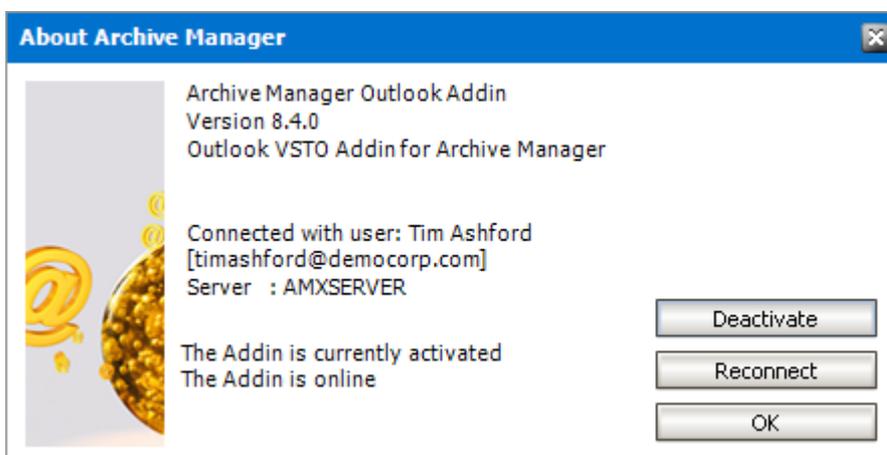
The Info feature presents information about the Archive Manager addin and allows you to manage the addin connectivity.

Steps to work with the Info feature

1. Click the **Archive Manager** addin.
2. Click **Info** from the ribbon.



3. The *About Archive Manager* window opens. This window displays the current version as well as the current status of the addin.



4. Click **Deactivate** to disconnect the addin from the Archive Manager server.
5. Click **Reconnect** to synchronize the addin with any changes made by the administrator in the AMAC.
6. Click **OK** to close the *About Archive Manager* window.

About Us

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The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal allows you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos
- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product