

Metalogix[®] Archive Manager for Exchange 8.6

Outlook Add-in User Guide



© 2022 Quest Software 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 Quest Software Inc.

The information in this document is provided in connection with Quest Software 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 Quest Software products. EXCEPT AS SET FORTH IN THE TERMS AND CONDITIONS AS SPECIFIED IN THE LICENSE AGREEMENT FOR THIS PRODUCT, QUEST SOFTWARE 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 QUEST SOFTWARE 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 QUEST SOFTWARE HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. Quest Software 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. Quest Software 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:

Quest Software Inc. Attn: LEGAL Dept. 4 Polaris Way Aliso Viejo, CA 92656

Refer to our Web site (https://www.quest.com) for regional and international office information.

Patents

Quest Software is proud of our advanced technology. Patents and pending patents may apply to this product. For the most current information about applicable patents for this product, please visit our website at https://www.quest.com/legal.

Trademarks

Quest, the Quest logo, and Metalogix are trademarks and registered trademarks of Quest Software Inc. and its affiliates. For a complete list of Quest marks, visit <u>https://www.quest.com/legal/trademark-information.aspx</u>. All other trademarks and registered trademarks are property of their respective owners.

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 2022 Version 8.6

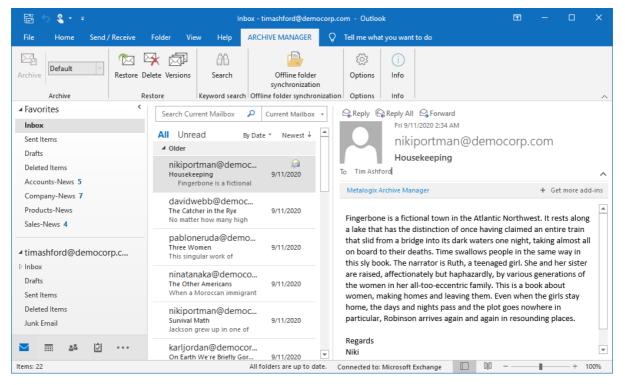
Contents

Introduction	ŀ
Archiving emails	;
Restoring archived emails	}
Deleting archived emails)
Search	2
How to build search queries	3
Versions	}
Offline synchronization)
Options	i
Info	;
About Us	,
Contacting Quest	,
Technical Support Resources	,

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 8.6 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:

lcon	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.

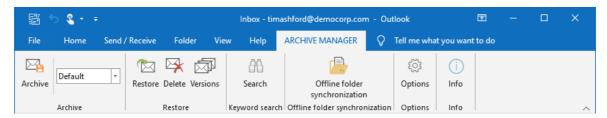
Outlook[®] is a registered trademark of Microsoft Corporation. All features of the Archive Manager Outlook Add-in are valid of Outlook 2013 and later.

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.

Progress	8
Archiving messages Message 0 / 1	
	Cancel

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.

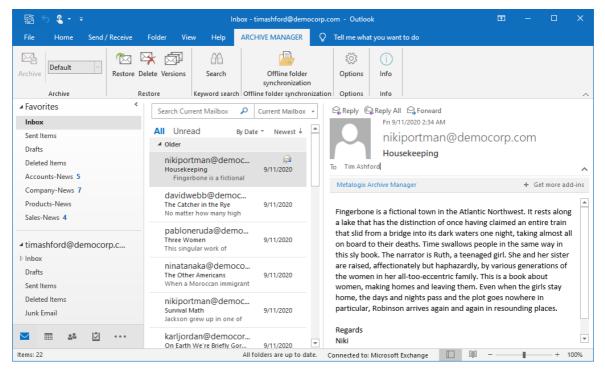


Restoring archived emails

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.

Restore messages							
Restoring messages							
Delete from archive	Restore	Cancel					

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 <u>Search</u> 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.

Progress	×
Restoring messages	
Message 0 / 1	
	Cancel

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

NOTE: To ensure the delete process is successful, you must deactivate the Cached Exchange Mode in Outlook.

To deactivate Cached Exchange Mode in Outlook:

- 1. Click File > Account Settings > Account Settings.
- 2. Click the Exchange or Microsoft 365 account from the *Email* tab, and then click **Change**.
- 3. Under Offline Settings, uncheck Use Cached Exchange Mode. If you're a Microsoft 365 subscriber, uncheck Use Cached Exchange Mode to download email to an Outlook data file.
- 4. Exit, and then restart Outlook.

Alternatively, you can keep Cached Exchange Mode activated and set **Mail to keep offline** (or **Download email for the past** for Microsoft 365 subscribers) to a date range greater than the received emails being deleted.

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

	📰 🕤 🍳 👻 🗧 Inbox - timashford@democorp.com - Outlook						ন		×				
File	Home	Send /	/ Receive	Fold	er Vi	ew Help	ARCHIVE MANAGER	Q	Tell me wha	it you want	to do		
<u>M</u>	Default	-	K	⊠⊀	Ā	ĉô			ţŢ,	í			
Archive	Delault		Restore	Delete	Versions	Search	Offline folder synchronization		Options	Info			
	Archive			Restore		Keyword searc	h Offline folder synchron	ization	Options	Info			~

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

Delete from archive							
	You have selected 1 messages Do you really want to delete?						
Del	ete from archive	Delete	Cancel				

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

5

In this chapter:

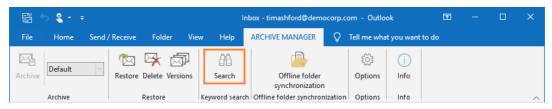
- <u>Keyword Search</u>
- Advanced Search
- How to build search queries

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.

Keyword sea	rch							X
Keyword:	ch .					Search	Clear	
Advanced	Mailboxes S	ettings					[
	And/Or Field	ł	Operator		Value			
+ Add new								
From	Subject	Attachment	Size	Version	Received	Archived date	Folder	
<								>
Load	Save	-ju				Display	Close	

Search

- 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.

Keyword search					
Keyword: book Advanced search				Search	Clear
Advanced Mailboxes Settings					
And/Or Field + Add new clause	Operator	Va	lue		
Search results: 2 messages found					
From Subject Attact	hment Size 7.42 KB 6.96 KB	Version 1 1		Archived date 3/30/2021 1:02:3 3/30/2021 12:56:	Inbox/Conferenc
< Load Save –پ				Display	Close

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.

Keyword: hello OR welcome Search Advanced search Search results: 5 messages found Search results: 5 messages found Attachment Size Version Received Archived date F Image: Solution of the search of th	Full text search										
Search results: 5 messages found Size Version Received Archived date F Comain CEO nomi 5.25 KB 1 10/4/2019 6:22:1 11/25/2019 6:09: 5 Domain Hello 3.25 KB 1 10/1/2019 7:00:3 11/25/2019 6:09: 5 Comain Hello 7.39 KB 1 10/1/2019 7:00:3 11/25/2019 6:09: 5 Domain Welcome 7.43 KB 1 10/1/2019 12:51 11/25/2019 6:09: 5	Clear										
Subject Attachment Size Version Received Archived date F Domain CEO nomi 5.25 KB 1 10/4/2019 6:22:1 11/25/2019 6:09: S Domain Hello 3.25 KB 1 10/1/2019 7:00:3 11/25/2019 6:09: S Domain Hello 7.39 KB 1 10/1/2019 7:00:3 11/25/2019 6:09: S Domain Welcome 7.43 KB 1 10/1/2019 12:51: 11/25/2019 6:09: S	Advanced search										
☐ Domain CEO nomi 5.25 KB 1 10/4/2019 6:22:1 11/25/2019 6:09: 5 ☐ Domain Hello 3.25 KB 1 10/1/2019 7:00:3 11/25/2019 6:09: 5 ☐ Domain Hello 7.39 KB 1 10/1/2019 7:00:3 11/25/2019 6:09: 5 ☐ Domain Hello 7.39 KB 1 10/1/2019 7:00:3 11/25/2019 6:09: 5 ☐ Domain Welcome 7.43 KB 1 10/1/2019 12:51: 11/25/2019 6:09: 5											
☐ Domain Hello 3.25 KB 1 10/1/2019 7:00:3 11/25/2019 6:09: S ☐ Domain Hello 7.39 KB 1 10/1/2019 7:00:3 11/25/2019 6:09: I ☐ Domain Hello 7.39 KB 1 10/1/2019 7:00:3 11/25/2019 6:09: I ☐ Domain Welcome 7.43 KB 1 10/1/2019 12:51: 11/25/2019 6:09: I	Folder										
☐ Domain Hello 7.39 KB 1 10/1/2019 7:00:3 11/25/2019 6:09: I ☐ Domain Welcome 7.43 KB 1 10/1/2019 12:51: 11/25/2019 6:09: E	Sent Items										
Domain Welcome 7.43 KB 1 10/1/2019 12:51: 11/25/2019 6:09: [Sent Items										
	Inbox										
Domain Welcome 3.27 KB 1 10/1/2019 12:51: 11/25/2019 6:09: 5	Deleted Items										
	Sent Items										
Load Save - A Display	Close										

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"
ΝΟΤ	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	"test data" NOT "test server" searches for documents that contain "test data" but not "test server"
	Note: The NOT operator cannot be used with just one term. For example, the following search will return no results: 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"

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 ":", "\", "!", "^", "~".

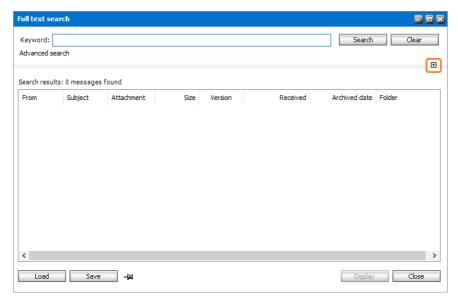
You can use the Save / Load buttons to save / load search criteria you have specified. It is especially useful e.g. when you have set special settings for Advanced search (see further).

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**.
 - NOTE: You can group clauses to create nested search criteria by selecting consecutive check boxes and clicking the **[\equiv** icon.

Full text searc	ch							- 0 X
Keyword:	ch					Search		Clear
	Mailboxes	Settings						Ξ
	And/Or F	ield	Operator	Value				
+ × 🗆	s	ubject ~	= ~	Hello				
+ × 🗆 [Or 🗸 S	ubject 🗸	= ~	Welcome				
+ Add new c	:lause							
Search results:	0 message	es found						
From	Subject	Attachment	Size Ver	sion Received	A	rchived date	Folder	
<								>
Load	Sav	e –µ				Display		Close

- 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.
 - **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

Full text search	
Keyword:	Search Clear
Advanced search	8
Advanced Mailboxes Settings	
Mailbox domadmin@democorp.com Niki Portman Ishna Mohan Devika Sharma	
Search results:	
From Subject Attachment Size	Version Received Archived date Folder
<	>
Load Save –µ	Display

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

Full text sear	ch								
Keyword:							Search		Clear
Auvanceu sear									Ξ
Advanced	Mailboxes S	ettings							
Limit se	arch results to	10000	÷						
Sear	ch in archived a	and deleted docu	ments						
Sear	ch in deleted de	ocuments							
Sear	ch in versions.	The match will be	shown for eac	h version sepa	rately.				
Search results:									
From	Subject	Attachment	Size	Version	Receive	i 4	Archived date	Folder	
<									>
Load	Save	-jai					Display		Close

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 options allow you to specify the category of documents to search.
 - *No selection* only archived documents are searched. Previous versions of these documents are not included.

Select one of the following options:

- Search in archived and deleted documents all documents will be searched. Previous versions of these documents are not included.
- Search in deleted documents deleted documents and documents that are marked for deletion will be searched. All other archived documents will be ignored. Previous versions of these documents are not included.

Add an additional criteria:

- Search in versions Previous versions will be included for the document category specified. The match will be shown for each version separately..
- 7. Click **Search** to search for archived emails based on the selection criteria, the mailboxes specified and the settings that are applied.

dvanced sear							
dvanced	Mailboxes	Settings					
	And/Or	Field	Operator	Value	2		
+ × 🗆		Subject	~ =	∼ Hello			
+ × 🗆	Or 🗸	Subject	~ =	✓ Welco	ome		
	clause						
arch results	: 4 messa	-	Size	Version	Received	Archived date	Folder
arch results	: 4 messag Subject	ges found Attachment	Size	Version 1	Received	Archived date	
arch results rom ≩ Domain	: 4 messag Subject Hello	-	Size 7.39 KB 3.25 KB	Version 1 1	10/1/2019 7:00:3	11/25/2019 6:09:	Inbox
arch results rom ≩ Domain ≩ Domain	: 4 messag Subject Hello Hello	Attachment	7.39 KB	1	10/1/2019 7:00:3	11/25/20196:09: 11/25/20196:09:	Inbox Sent Items
arch results rom Domain Domain Domain Domain	: 4 messag Subject Hello Hello Welcome	Attachment	7.39 KB 3.25 KB	1 1	10/1/2019 7:00:3 10/1/2019 7:00:3 10/1/2019 12:51:	11/25/20196:09: 11/25/20196:09:	Inbox Sent Items Deleted Items

8. 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.

How to build search queries

This topic describes how to build search conditions using the advanced search capabilities of Archive Manager for Exchange. A search condition (or query) can contain zero or more search clauses that are combined using operators and grouping of search clauses.

In this topic:

- <u>Simple Conditions</u>
- AND/OR operators
- Grouping
- <u>Keyword Search</u>

Simple Conditions

A simple search conditions needs no search clause or can contain just one search clause.

Search

Example 1

Click **Search** without adding a search clause. In this case, you will get back all the archived items.

						Search	Clear
dvanced sear	rch						
dvanced	Mailboxes S	ettings					
	And/Or Field	1	Operator	1	Value		
arch results:	91 messages f	ound					
	91 messages f Subject	ound Attachment	Size	Version	Received	Archived date	Folder
rom			Size	Version 1			
rom					Received 7/21/2021 11:20: 2/9/2021 3:02:57	8/19/2021 4:10:0	Contacts/Recipier
rom 🗐 🗟 amadmin	Subject		1.48 KB	1	7/21/2021 11:20:	8/19/2021 4:10:0 8/19/2021 4:10:0	Contacts/Recipier Inbox
irom i amadmin amadmin	Subject		1.48 KB 9.85 KB	1 1	7/21/2021 11:20: 2/9/2021 3:02:57 2/9/2021 3:02:57	8/19/2021 4:10:0 8/19/2021 4:10:0	Contacts/Recipier Inbox Inbox
arch results: irom amadmin amadmin amadmin amadmin amadmin	Subject a seventy voice addr	Attachment	1.48 KB 9.85 KB 8.08 KB	1 1 1	7/21/2021 11:20: 2/9/2021 3:02:57 2/9/2021 3:02:57 2/9/2021 3:02:57	8/19/2021 4:10:0 8/19/2021 4:10:0 8/19/2021 4:10:1	Contacts/Recipier Inbox Inbox Inbox

Example 2

Add a single search clause with a condition where the field *Subject* contains the word "them". When you click **Search**, you will get back all the archived items where the *Subject* contains the word "them".

	rch							- 0 ×
Keyword:						Search	C	lear
Advanced sea	rch							_
Advanced	Mailboxes	Settings						
	And/Or	Field	Operator		Value			
+ × 🗆		Subject	✓ Contains	~ t	:hem			
+ Add new	dause							
- Had non	cidado							
Search results:	: 4 message	es found						
Gearch results:	: 4 message Subject	es found Attachment	Size	Version	Received	Archived date	Folder	
	-	Attachment	Size 4.41 KB	Version 1				
From	Subject French si	Attachment			2/9/2021 2:46:44	8/19/2021 4:09:4	Calendar	
From	Subject French si so jaded	Attachment n t 1	4.41 KB	1	2/9/2021 2:46:44 2/9/2021 2:46:35	8/19/2021 4:09:4 8/19/2021 4:10:3	Calendar Inbox	
From Bamadmin	Subject French si	Attachment n t 10	4.41 KB 89.26 KB	1 1	2/9/2021 2:46:44 2/9/2021 2:46:35 2/9/2021 2:46:30	8/19/2021 4:09:4 8/19/2021 4:10:3 8/19/2021 4:10:5	Calendar Inbox Inbox	
From amadmin Ca	Subject French sii so jaded splashing	Attachment n t 1	4.41 KB 89.26 KB 4.42 KB	1 1 1	2/9/2021 2:46:44 2/9/2021 2:46:35	8/19/2021 4:09:4 8/19/2021 4:10:3 8/19/2021 4:10:5	Calendar Inbox Inbox	
From amadmin Ca	Subject French sii so jaded splashing	Attachment n t 1	4.41 KB 89.26 KB 4.42 KB	1 1 1	2/9/2021 2:46:44 2/9/2021 2:46:35 2/9/2021 2:46:30	8/19/2021 4:09:4 8/19/2021 4:10:3 8/19/2021 4:10:5	Calendar Inbox Inbox	
From amadmin Ca	Subject French sii so jaded splashing	Attachment n t 1	4.41 KB 89.26 KB 4.42 KB	1 1 1	2/9/2021 2:46:44 2/9/2021 2:46:35 2/9/2021 2:46:30	8/19/2021 4:09:4 8/19/2021 4:10:3 8/19/2021 4:10:5	Calendar Inbox Inbox	,
From amadmin Ca Ca Ca Ca Ca Ca Ca Ca Ca Ca	Subject French sii so jaded splashing	Attachment n t 1	4.41 KB 89.26 KB 4.42 KB	1 1 1	2/9/2021 2:46:44 2/9/2021 2:46:35 2/9/2021 2:46:30	8/19/2021 4:09:4 8/19/2021 4:10:3 8/19/2021 4:10:5	Calendar Inbox Inbox	>
From amadmin Ca Ca Ca Ca Ca Ca Ca Ca Ca Ca	Subject French sii so jaded splashing	Attachment 1 1	4.41 KB 89.26 KB 4.42 KB	1 1 1	2/9/2021 2:46:44 2/9/2021 2:46:35 2/9/2021 2:46:30	8/19/2021 4:09:4 8/19/2021 4:10:3 8/19/2021 4:10:5	Calendar Inbox Inbox Inbox	>

AND/OR operators

The AND/OR operator is used between two search clauses. With these operators, you can combine two or more search clauses. The AND operator will return a search result if both the

search clauses separated by the AND operator are fulfilled. The OR operator will return a search result if any one of the search clauses separated by the OR operator are fulfilled. The AND operator has a higher priority over the OR operator. When a search condition contains both the AND and OR operators, the search clauses that are combined with the AND operator must be fulfilled first.

Example 1

To find all items where the *Subject* contains word "them" AND the *Sender* is "amadmin", you must combine two search clauses as shown:

Keyword sear	·ch						×
Keyword:	ch					Search	Clear
Advanced	Mailboxes	Settings					
	And/Or	Field	Operator		Value		
+ × 🗆		Subject 🔻	 Contains 	~	them		
+ × 🗆	And 🗸	From 🔻	/ =	~	amadmin		
Search results:	-						
From	Subject	Attachment	Size	Version	Received	Archived date	
amadmin .	French s	in	4.41 KB	1	2/9/2021 2:46:44	8/19/2021 4:09:4	Calendar >
Load	Sa	ave – 🗐				Display	Close

Example 2

To find all items where the *Subject* contains word "them" OR the *Sender* is "amadmin", you must combine two search clauses as shown:

eyword:						Search	Clea	ar
dvanced sea	rch							F
dvanced	Mailboxes	Settings						E
	And/Or	Field	Operator		Value			
+ × 🗆		Subject	✓ Contains	~ t	hem			
+ × 🗆	Or 🗸	From	~ =	~ .	amadmin			
+ Add new	clause							
arch results:	63 messa	-	Size	Version	Received	Archived date	Folder	
arch results:	63 messa Subject	Attachment	Size	Version	Received	Archived date		
arch results: irom	63 messa Subject a sevent	Attachment	9.85 KB	1	2/9/2021 3:02:57	8/19/2021 4:10:0	Inbox	,
arch results: irom ≩ amadmin ≩ amadmin	63 messa Subject a sevent voice add	Attachment	9.85 KB 8.08 KB	1 1	2/9/2021 3:02:57 2/9/2021 3:02:57	8/19/2021 4:10:0 8/19/2021 4:10:1	Inbox Inbox	,
arch results: From amadmin amadmin amadmin	63 messa Subject a sevent voice add "Who gar	Attachment	9.85 KB	1	2/9/2021 3:02:57 2/9/2021 3:02:57 2/9/2021 3:02:57	8/19/2021 4:10:0 8/19/2021 4:10:1 8/19/2021 4:10:1	Inbox Inbox Inbox	,
+ Add new	63 messa Subject a sevent voice add	Attachment / / 10 /	9.85 KB 8.08 KB 142.38 KB	1 1 1	2/9/2021 3:02:57 2/9/2021 3:02:57 2/9/2021 3:02:57 2/9/2021 3:02:57	8/19/2021 4:10:0 8/19/2021 4:10:1 8/19/2021 4:10:1	Inbox Inbox Inbox Sent Items	,
arch results: From amadmin amadmin amadmin amadmin amadmin	63 messa Subject a sevent voice add "Who gav a sevent	Attachment / / 0 / / / / / /	9.85 KB 8.08 KB 142.38 KB 5.2 KB	1 1 1 1	2/9/2021 3:02:57 2/9/2021 3:02:57 2/9/2021 3:02:57 2/9/2021 3:02:57	8/19/2021 4:10:0 8/19/2021 4:10:1 8/19/2021 4:10:1 8/19/2021 4:11:0 8/19/2021 4:11:0	Inbox Inbox Inbox Sent Items Sent Items	

Grouping

Sometimes simple combinations of search clauses with the AND and OR operators are not enough. Grouping is a good solution to change the priority between the operators. The grouped search clauses have a higher priority than the operator before or after the group. The examples in this section describe how the grouping works.

Example 1

To find all items where the *Subject* contains the word "them" AND the *Sender* is "amadmin", and all these items must also have an attachment then the search condition is as shown:

eyword:	rch					Search	Clea	ar
								E
Advanced	Mailboxes	Settings						
	And/O	r Field	Operato	r	Value			
+ × 🗆	[≡	Subject	Contains	; ``	/ them			
+ × 🗆	Or	 From 	~ =	`	amadmin			
								_
	And clause	Has Attachment	~ =		Yes			~
+ Add new	clause 14 messag	es found						~
+ Add new	clause		V =	Version	Yes Received	Archived date	Folder	~
+ Add new earch results:	clause 14 messag	es found Attachment 1				Archived date 8/19/2021 4:10:1		~
+ Add new earch results: From amadmin	clause 14 messag Subject	es found Attachment 10	Size	Version	Received	8/19/2021 4:10:1	Inbox	· ·
+ X + Add new + Add new earch results:	clause 14 messag Subject "Who gav	es found Attachment 10 10	Size 142.38 KB	Version 1	Received 2/9/2021 3:02:57	8/19/2021 4:10:1 8/19/2021 4:11:0	Inbox Sent Items	~
+ Add new earch results: From amadmin amadmin amadmin amadmin	14 messag Subject "Who gav blood und blood und	es found Attachment 10 10 10	Size 142.38 KB 138.36 KB	Version 1 1	Received 2/9/2021 3:02:57 2/9/2021 3:02:57	8/19/2021 4:10:1 8/19/2021 4:11:0 8/19/2021 4:10:1 8/19/2021 4:11:0	Inbox Sent Items Inbox Sent Items	
+ Add new earch results: From amadmin amadmin amadmin	14 messag Subject "Who gav blood und	es found Attachment 0 0 0	Size 142.38 KB 138.36 KB 93.07 KB	Version 1 1 1	Received 2/9/2021 3:02:57 2/9/2021 3:02:57 2/9/2021 3:02:54	8/19/2021 4:10:1 8/19/2021 4:11:0 8/19/2021 4:10:1 8/19/2021 4:11:0 8/19/2021 4:11:1	Inbox Sent Items Inbox Sent Items Inbox	~

Query: (Subject contains "them" OR Sender is "amadmin") AND has attachment

We can split this search condition into two parts

1. (Subject contains "them" OR Sender is "amadmin") which is a group

2. AND has attachment

Since a grouping has a higher priority, the search condition in the group must be fulfilled first. In this case each item in the search result will have a *Subject* that contains the word "them" AND the *Sender* is "amadmin", and the item will also have an attachment

Example 2

To find all items where the Subject contains word "them" or, the Sender is "amadmin" and at the item must have an attachment, then the query is as shown:

Keyword search							×
Keyword:					Search	Clear	
Advanced Mailbox	es Settings					E	3
And/O	r Field	Operator		Value			٦
+ × 🗆	Subject 🔻	Contains	~	them			1
	- From	/ =	~	amadmin			1
+ × 🗆 And	 Has Attachment 	/ =	~	Yes		~	
Search results: 16 me:	sages found						
From Subje	t Attachment	Size	Version	Received	Archived date	Folder	^
📄 amadmin 🕺 "Who	gav 🖞	142.38 KB	1	2/9/2021 3:02:57	8/19/2021 4:10:1	Inbox	
🖻 amadmin 🛛 "Who	gav 🖞	138.36 KB	1	2/9/2021 3:02:57	8/19/2021 4:11:0	Sent Items	
📄 amadmin 🛛 blood	und 🖞	93.07 KB	1	2/9/2021 3:02:54	8/19/2021 4:10:1	Inbox	
📄 amadmin 🛛 blood	und 👖	88.84 KB	1	2/9/2021 3:02:54	8/19/2021 4:11:0	Sent Items	
📄 amadmin 🛛 not wi	sh it 👖	314.56 KB	1	2/9/2021 2:58:25	8/19/2021 4:10:1	Inbox	
iamadmin not wi	shit 🖞	310.49 KB	1	2/9/2021 2:58:25	8/19/2021 4:11:1	Sent Items	1
Load	Save –ja				Display	Close	

Query:Subject contains "them" OR Sender "admin" AND has attachment

This query can be split into two parts

- 1. Subject contains "them" OR
- 2. Sender is "amadmin" AND the item has an attachment

The AND operator has a higher priority so the search clauses combined with the AND operator must be fulfilled first. In this case the search result will contain items where the item must have an attachment and the *Sender* must be "amadmin", or *Subject* should contain the word "them".

Example 3

To find all items where the *Subject* contains the word "them" and the *Sender* is "amadmin", or the item has attachment, and the item must be in the "Inbox" folder then the search condition is as shown:

dvanced sea	arch								E
dvanced	Mailboxes	Settings							
	And/Or	Field	(Operato	r	Value			
+ × 🗆	[Subject	~ 0	Contains	~	them			
+ × 🗆	[≡ And ∨	From	~ =	-	~	amadmin			
+ × 🗆	Or 🗸	Has Attachment	~ =	=	~	Yes			~
_									
		Folder Path	~ =	-	~	Inbox			
+ Add new			~ =	=		Inbox			
+ Add new	v clause		~ =	= Size	Version	Inbox	Archived date	Folder	
+ Add new	v clause	ound Attachment] [Received	Archived date 8/19/2021 4:10:3		
+ Add new	v clause s: 2 messages fo Subject	ound Attachment	89.:	Size	Version	Received 2/9/2021 2:46:35		Inbox	
+ Add new	v clause s: 2 messages fo Subject so jaded t	ound Attachment	89.:	Size .26 KB	Version 1	Received 2/9/2021 2:46:35	8/19/2021 4:10:3	Inbox	

Query:Subject contains "them" AND (Sender is "amadmin" OR has attachment) AND Folder path is "Inbox"

This query can be split into three parts

- 1. Subject contains "them" AND
- 2. (Sender is "amadmin" OR the item has an attachment)
- 3. AND Folder path is "Inbox"

The grouped search clauses have the higher priority in this query so the search condition in the group must be fulfilled first. In this case the search result will contain items where the *Subject* must contain the word "them" + *Sender* should be "amadmin" or the item has an attachment + the folder path must be "Inbox".

Example 4

To find all items where the Subject contains the word "them" and Sender is "amadmin", or the item has an attachment and these items should be in the "Inbox" folder then the search query is as shown:

eyword:						Search		ear
dvanced sea	rch							E
Advanced	Mailboxes	Settings						
	And/Or F	Field	Operator		Value			
+ × 🗆	9	ubject	 Contains 	\sim	them			
+ × 🗆	And 🗸 F	rom	~ =	~	amadmin			
+ × 🗆	Or VH	las Attachment	~ =	~	Yes			
T ^ U	Ur v r	las Accachineric	~ =	Ť	res			× ×
+ × 🗆	And \vee F	older Path	~ =	~				
+ Add new	<u> </u>	older Path	~ =	~	Inbox			
·	clause		×] =					
earch results:	clause		Size	Version	Received	Archived date	Folder	1
earch results: From	clause 17 messag	es found				Archived date 8/19/2021 4:10:1		,
earch results: From	clause 17 messag Subject	Attachment 10	Size	Version	Received	8/19/2021 4:10:1	Inbox	ŕ
+ Add new earch results: From amadmin amadmin amadmin	clause 17 message Subject "Who gav.	Attachment 10 10 10	Size 142.38 KB	Version 1	Received 2/9/2021 3:02:57	8/19/2021 4:10:1 8/19/2021 4:10:1	Inbox Inbox	,
earch results: From amadmin amadmin amadmin amadmin	: 17 messag Subject "Who gay, blood und,	Attachment 10 10 10	Size 142.38 KB 93.07 KB	Version 1 1	Received 2/9/2021 3:02:57 2/9/2021 3:02:54	8/19/2021 4:10:1 8/19/2021 4:10:1 8/19/2021 4:10:1	Inbox Inbox Inbox	,
earch results: From amadmin amadmin amadmin amadmin	: 17 message Subject "Who gay. blood und, not wish it	Attachment 10 10 10 10 10 10 	Size 142.38 KB 93.07 KB 314.56 KB	Version 1 1 1	Received 2/9/2021 3:02:57 2/9/2021 3:02:54 2/9/2021 2:58:25	8/19/2021 4:10:1 8/19/2021 4:10:1 8/19/2021 4:10:1 8/19/2021 4:10:2	Inbox Inbox Inbox Inbox	,
earch results: From amadmin amadmin amadmin	Clause 17 message Subject "Who gay, blood und, not wish it back seize	Attachment 10 10 10 10	Size 142.38 KB 93.07 KB 314.56 KB 71.32 KB	Version 1 1 1 1 1	Received 2/9/2021 3:02:57 2/9/2021 3:02:54 2/9/2021 2:58:22 2/9/2021 2:58:22	8/19/2021 4:10:1 8/19/2021 4:10:1 8/19/2021 4:10:1 8/19/2021 4:10:2 8/19/2021 4:10:2 8/19/2021 4:09:4	Inbox Inbox Inbox Inbox Calendar	

Query:Subject contains "them" AND Sender is "amadmin" OR has attachment AND Folder path is "Inbox"

This query can be split into two parts

- 1. Subject contains "them" AND Sender is "amadmin" OR
- 2. Item has attachment AND Folder path is "Inbox"

The AND operator has a higher priority in this query so the conditions with the AND operators must be fulfilled first. In this case the search result will contain all items where *Subject* contains the word "them" and *Sender* is "amadmin" or the item must have an attachment and the folder path must be "Inbox".

Example 5

To find all items where the Subject contains word "them" or these items are in the "Inbox" folder, and the Sender is "amadmin" or the item has an attachment, then the query is as shown:

eyword:						Search		Clear
dvanced sear	rch							F
dvanced	Mailboxes	Settings						
	And/Or	Field	Operato	r	Value			
+ × 🗆	[≡	Subject	✓ Contains	: ``	/ them			
+ × 🗆	Or 🗸	Folder Path	~ =	``````````````````````````````````````	Inbox			
	-	[
+ × 🗆	🔳 And 🗸	From	~ =	`	amadmin			
+ × 🗆	Or ~	From Has Attachment	<pre>> =</pre>					~
+ × 🗆 + Add new	Or ~	Has Attachment						~
+ × □ + Add new	Or ~	Has Attachment				Archived date	Folder	~
+ X + Add new	Clause	Has Attachment	=		Yes			~
+ X + Add new + Add new earch results: From amadmin	clause 33 messages Subject	Has Attachment	Size	Version	Yes	8/19/2021 4:10:0	Inbox	~
+ X + Add new	clause 33 messages Subject a seventy	Has Attachment	Size 9.85 KB	Version 1	Yes Received 2/9/2021 3:02:57	8/19/2021 4:10:0 8/19/2021 4:10:1	Inbox Inbox	~
+ × 🗆 + Add new	clause 33 messages Subject a seventy voice addr	Has Attachment	 Size 9.85 KB 8.08 KB 	Version 1 1	Yes Received 2/9/2021 3:02:57 2/9/2021 3:02:57	8/19/2021 4:10:0 8/19/2021 4:10:1 8/19/2021 4:10:1	Inbox Inbox Inbox	~
+ X + Add new	clause	Has Attachment found Attachment	✓ = Size 9.85 KB 8.08 KB 142.38 KB	Version 1 1 1	Yes Received 2/9/2021 3:02:57 2/9/2021 3:02:57 2/9/2021 3:02:57	8/19/2021 4:10:0 8/19/2021 4:10:1 8/19/2021 4:10:1 8/19/2021 4:10:1	Inbox Inbox Inbox Inbox	~

Query: (Subject contains "them" OR Folder path is "Inbox") AND (Sender is "amadmin" OR has attachment)

This query can be split into two parts

- 1. (Subject contains "them" OR Folder path is "Inbox") AND
- 2. (Sender is "amadmin" OR item has attachment)

The grouped condition has the higher priority in this query so the conditions in the group must be fulfilled first. In this case the search result will contain items where Subject should contain "them" word or folder path should be "Inbox" + Sender should be "amadmin" or the item should have an attachment.

Example 6

To find all items where the Subject contains the word "them" or, these items are in the "Inbox" folder and the Sender is "amadmin", or the item has an attachment, then query is as shown:

eyword:						Search	Clea	ar
								6
dvanced	Mailboxes And/Or	Field	Operator		Value			
+ × 🗆	2	Subject	 Contains 	~	them			
+ × 🗆	Or 🗸 F	Folder Path	~ =	\sim	Inbox			
+ × 🗆	And 🗸 F	From	~ =	~	amadmin			
+ x 🗆		Has Attachment	~ =	~	Ves			~
		Has Attachment	-	~	Yes			~
+ 🗙 🗌 + Add new		Has Attachment	-	~	Yes			~
		Has Attachment	-	~	Yes			~
+ Add new	clause		× =	~	Yes			~
+ Add new	clause		Size	Version	Yes	Archived date	Folder	~
+ Add new	clause 44 messag	jes found Attachment				Archived date 8/19/2021 4:10:0		_
+ Add new earch results: From	clause 44 messag Subject	jes found Attachment	Size	Version	Received	8/19/2021 4:10:0	Inbox	_
+ Add new earch results: From amadmin amadmin	44 messag Subject a seventy	ges found Attachment r	Size 9.85 KB	Version 1	Received 2/9/2021 3:02:57	8/19/2021 4:10:0 8/19/2021 4:10:1	Inbox Inbox	_
+ Add new earch results: From amadmin amadmin amadmin	44 messag Subject a seventy voice addr	jes found Attachment / / 1	Size 9.85 KB 8.08 KB	Version 1 1	Received 2/9/2021 3:02:57 2/9/2021 3:02:57	8/19/2021 4:10:0 8/19/2021 4:10:1 8/19/2021 4:10:1	Inbox Inbox Inbox	_
	44 messag Subject a seventy voice addr "Who gav	Attachment	Size 9.85 KB 8.08 KB 142.38 KB	Version 1 1 1	Received 2/9/2021 3:02:57 2/9/2021 3:02:57 2/9/2021 3:02:57	8/19/2021 4:10:0 8/19/2021 4:10:1 8/19/2021 4:10:1 8/19/2021 4:11:0	Inbox Inbox Inbox Sent Items	_
+ Add new earch results: From amadmin amadmin amadmin amadmin	44 messag Subject a seventy voice addi "Who gav	Jes found Attachment 7 7 10 10 	Size 9.85 KB 8.08 KB 142.38 KB 138.36 KB	Version 1 1 1 1	Received 2/9/2021 3:02:57 2/9/2021 3:02:57 2/9/2021 3:02:57 2/9/2021 3:02:57	8/19/2021 4:10:0 8/19/2021 4:10:1 8/19/2021 4:10:1 8/19/2021 4:11:0 8/19/2021 4:11:0 8/19/2021 4:10:1	Inbox Inbox Inbox Sent Items Inbox	_

 $\ensuremath{\mathsf{Query}}\xspace:$ Subject contains "them" OR Folder path Inbox AND Sender is "amadmin" OR item has an attachment

This query can be split into three parts

- 1. Subject contains "them" OR
- 2. Folder path is "Inbox" AND Sender is "amadmin"
- 3. OR item has an attachment

The AND operator has a higher priority so the conditions with the AND operator must be fulfilled first. In this case the search result will contain items where *Subject* must contain the word "them" or folder path must be "Inbox" and *Sender* must be "amadmin" or the item has an attachment.

Keyword Search

Keyword search provides a fast and flexible search for keywords in the email Subject, body, and attachments of messages in Metalogix Archive Manager for Exchange. If you leave this field empty, then the search result will show all archived messages. If you enter a word or phrase in the keyword field and click Search the result of the search will show all the archived messages where the Subject, body or attachment contains the entered word or phrase.

Example 1

You can combine keyword searches with advanced search clauses to find specific messages. Keyword searches are combined with advanced search conditions with the AND operator. The search result will contain items that have the keyword and the advanced search conditions as well. To find all messages where the Subject, body or attachment contains word "mother" and the Subject also contains the word "them", the search query is as shown:

eyword: r						Search	Clea	ar
dvanced se	earch							
dvanced	Mailboxes	Settings						
	And/Or Fie	ld	Operator	1	/alue			
+ × 🗆] Sut	oject	✓ Contains	~ t	hem			
arch result	ts: 1 messages f Subject	Attachment	Size	Version	Received	Archived date		
		Attachment	Size 91.82 KB	Version 1		Archived date 8/19/2021 4:10:5		
rom	Subject	Attachment						

The body of the message contains word "mother", and the Subject contains word "them"

NOTE: To search in journal mailboxes:

- If a user has Journal permission set in ArchiveWeb then the user can search through their own emails, where it is present as a kind of recipient (sender, recipient).
- If a user has Journal access granted through Archive Manager > Tools > Mailbox rights manager, then the user can search all emails in the Journal.

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.

۷	ersions					
	Version	From	Subject	Size	Received	Archived date
	<u>e</u> 2	nikiportman@democorp.com	Housekeeping	96 KB	9/10/2020 10:34:00 PM	1/28/2021 7:14:02 AM
	i 🖂 🖂	nikiportman@democorp.com	Housekeeping	7.04 KB	9/10/2020 10:34:00 PM	1/28/2021 6:53:33 AM
	Restore	Create new copy	-ja		Display	Close

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. –µ click the pin icon to keep the *Versions* window always on top while you work with other applications. Click to *P* unpin the window.

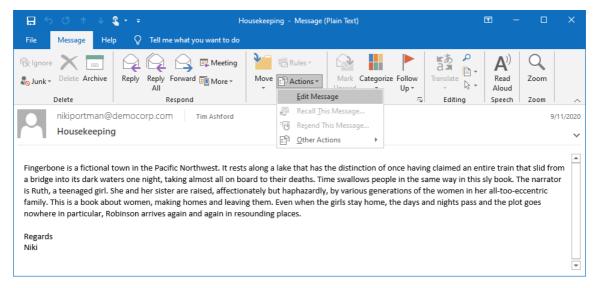
NOTE:

- 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.

Keyword: northwest						Search Cle	ar
Advanced search							
							E
Gearch results: 5 messages fou	nd						
From	Subject	Attachment	Size	Version	Received	Archived date	Folde
A 44 4 4	Housekeeping		7.04 KB	1	9/11/2020 2:34:00 AM	1/26/2021 10:42:20 PM	Inbo
nikiportman@democorp.com							Teles
nikiportman@democorp.com			96 KB	2	9/11/2020 2:34:00 AM	1/28/2021 7:14:02 AM	INDO
			96 KB	2	9/11/2020 2:34:00 AM	1/28/2021 7:14:02 AM	INDO
			96 KB	2	9/11/2020 2:34:00 AM	1/28/2021 7:14:02 AM	INDO

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 <u>Offline options</u>.

Steps to synchronize archived emails for offline use

NOTE: To ensure the offline folder synchronization process is successful, you must deactivate the Cached Exchange Mode in Outlook.

To deactivate Cached Exchange Mode in Outlook:

- 1. Click File > Account Settings > Account Settings.
- 2. Click the Exchange or Microsoft 365 account from the *Email* tab, and then click **Change**.
- 3. Under Offline Settings, uncheck Use Cached Exchange Mode. If you're a Microsoft 365 subscriber, uncheck Use Cached Exchange Mode to download email to an Outlook data file.
- 4. Exit, and then restart Outlook.

Alternatively, you can keep Cached Exchange Mode activated and set **Mail to keep offline** (or **Download email for the past** for Microsoft 365 subscribers) to a date range greater than the received emails being deleted.

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

🛱 🕤 🌯 • 🔻		Int	box - timashford@democorp	.com - Outlook	ন		×
File Home Send	/Receive Folder Vie	w Help	ARCHIVE MANAGER	Tell me what you want t	to do		
Archive Default	Restore Delete Versions	Search	Offline folder synchronization	्रे Options Info			
Archive	Restore	Keyword search	Offline folder synchronizatio	on Options Info			~

4. When you reconnect wit 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

8

In this chapter:

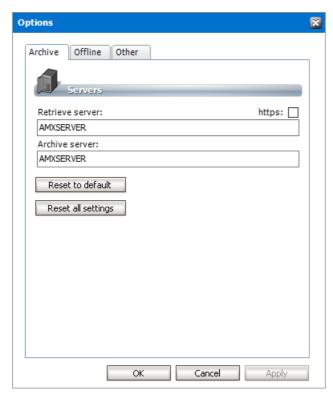
- Archive options
- Offline options
- Other options

Archive Options

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

F	i 5 🤱 -	÷				Inbox - timashf	ord@democorp.com - O	Outloo	ok		Ŧ	—	×
Fil	e Home	Send ,	/ Receive	Folder	View	v Help	ARCHIVE MANAGER	Q	Tell me wha	it you want to	o do		
Arch	Default	~	C Restore	Delete Ver	sions	Search	Offline folder synchronization		्रि Options	(i) Info			
	Archive			Restore		Keyword search	Offline folder synchroniza	ation	Options	Info			~

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.

Options
Archive Offline Other
Offline settings
Auto synchronize when Outlook starts
Auto synchronize when Outlook exits
Schedule offline synchronization every
Show progress dialog
Folder settings
OK Cancel Apply

The properties are as described below:

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

Offline and cache settings
Cache folder Current location:
C: (Users\timashford\AppData\Roaming\Metalogix Software\Archive Manager\ADDINCAC+ Limit: 2048 MB Settings Clear cache
Offline folders Use Outlook's offline settings Select folders for offline synchronization:
Contacts Contacts Contacts Conversation Action Setting Deleted Items Darfts ExternalContacts Files Junk Email Junk Email Quick Step Settings Quick Step Settings Conversation
OK Cancel Apply

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.)

Cache folder settings		×
Cache folder limit:		2048 🖨 MB
	1 I I	2040 VIB
Limit cache by date		
730 🌲 days		
	ОК	Cancel

Set the cache limits as described below:

- **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.

Offline and cache settings
Cache folder
Current location:
C:\Users\timashford\AppData\Roaming\Metalogix Software\Archive Manager\ADDINCACH
Limit: 2048 MB Settings Clear cache
Use Outlook's offline settings
Select folders for offline synchronization:
Conversation Action Setting Conversation Action Action Action Action Action Action Conversation Action Action Action Action Conversation Action ConversationAction Conversation Action ConversationActi
Notes Outbox Quick Step Settings Settings
OK Cancel Apply

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.

ffline and cache settings
Current location:
C: \Users\timashford\AppData\Roaming\Metalogix Software\Archive Manager\ADDINCACF
.imit: 2048 MB Settings Clear cache
Offline folders
Use Outlook's offline settings
Select folders for offline synchronization:
Check subfolders Uncheck subfolders Uncheck subfolders Uncheck subfolders Apply the same setting for subfolders Clear limits for subfolders Quick Step Settings
OK Cancel Apply

- 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.

Options	×
Archive Offline Other	7
Addin options	
Language English V	
OK Cancel Apply	

Info

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.

F	🗄 🕤 🍳 👻 🗧 Inbox - timashford@democorp.com - Outlook									ħ		×	
File	Home	Send ,	/ Receive	Folder	Viev	w Help	ARCHIVE MANAGER	Q	Tell me wha	t you want to	do		
	Default	Ţ	N	🖄 🖄	J.	ĉê			i);	í			
Archive	Deldale		Restore	Delete Vers	ions	Search	Offline folder synchronization		Options	Info			
Archive			Restore			Keyword search	Offline folder synchronization		Options	Info			~

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

About Archive Manager Outlook Addin						
	Archive Manager Outlook Addin Version 8.6.0 Outlook VSTO Addin for Archive Manager Connected with user: amadmin [amadmin@am19.local] Server : MAM19 The Addin is currently activated The Addin is online OK					

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

37

About Us

Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management, to Active Directory and Office 365 management, and cyber security resilience, Quest helps customers solve their next IT challenge now. Around the globe, more than 130,000 companies and 95% of the Fortune 500 count on Quest to deliver proactive management and monitoring for the next enterprise initiative, find the next solution for complex Microsoft challenges and stay ahead of the next threat. Quest Software. Where next meets now. For more information, visit <u>www.quest.com</u>.

Contacting Quest

For sales or other inquiries, visit <u>www.quest.com/contact</u>.

Technical Support Resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at https://support.quest.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. 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