Quest® Archive Manager 5.11

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.

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Getting started with Archive Manager

- Introduction
- How do I?
- Accessing your archive from a mobile device

Introduction

Archive Manager's main screen display appears when you log in. These tabs are contained in the left sidebar of the screen:

- **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 the list. For example, the mailboxes that have been delegated to you will show up with a [delegated] icon. 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.

  TIP: A Show More link will appear under the mailbox list if there are more items to load. To quickly find a mailbox, search by the mailbox name with the search box above the mailbox list.

- **Saved Searches:** Your saved searches will appear in this tab where you can execute a search by clicking the title of the saved search. See the Saving and reusing searches section for more information.

TIP: To collapse (hide) or expand (un-hide) the entire sidebar, click the hamburger menu in the top left corner of the screen.

The **Email Search** area, to the right of the sidebar, contains an Email Search form where most of your searches take place, and where the results of your searches and reports are displayed. See the Searching email section for more information.

These options are provided by the drop down menu in the top right corner of the screen:

- **Administration**: Redirects you to the Administration Website. Refer to the Administration Guide for more information.
- **My Search Log**: 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 in the Administration Website depending upon your access permissions. See the My Search Log report section for more information.
- **Change Password**: 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.

  NOTE: The **Change Password** option is not visible when you access from a mobile device.

- **Help**: Opens the online Archive Manager documentation.
- **Logout**: Logs out of your account.

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

Do an investigation

Archive Manager is ideal for you if you need to sift through email as part of an investigation: in the Email Search area, 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:

Select **To or From** from the drop down list to the left of the search box. For detailed information see the To or From section of this guide.

Share my mailbox with other users

To give or remove another user access to your mailbox:

1. In the left sidebar of the screen, hover over the mailbox name, a more options icon […] will appear to the right of the mailbox name. Click the icon […] and select **Security** to display the **Assign Mailbox Security** dialog box.

   NOTE: You must have proper permissions to assign or remove user access, otherwise the **Security** option will be unavailable.

2. To give access to another user, search for and click the user name you wish to have access to your mailbox in the **Unassigned Users** column. The user moves to the column on the right.

   To remove another user's access, search for and click the user name you wish to remove his or her access to your mailbox in the **Assigned Users** column. The user moves to the column on the left.

3. **Click OK** to close the dialog box.

   Next time the user(s) you selected logs in to Archive Manager, or refreshes their screen if already signed in, your Mailbox will be or no longer 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, select **Attachments** from the drop down list to the left of the search box.

To search for text contained within an attachment, select **Keyword** from the drop down list to the left of the search box, and after the search, select the **Attachments** tab on the result page. Your search can be further refined using the other fields in the drop down list if necessary. For more information see the Attachments section of this guide.

Accessing your archive from a mobile device

The website automatically detects mobile device users, and redirects them to the mobile version of the website by their screen resolution.

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

- Android browsers
- Safari Mobile

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Searching email

- The Email Search form
- Advanced search
- Search criteria fields
- Viewing your search results
- Saving and reusing searches

The Email Search form

The **Email Search** form lets you perform detailed and flexible searches. A search is defined, and can be further refined, by the search criteria you specify with two drop down lists on the left and right sides of the search box: The one to the left of the search box defines the search fields including Keyword, To or From, Date Range, Attachments, and Tags; the other one, to the right of the search box, defines the search scope: you can search a specific mailbox, a specific folder or subfolder within a mailbox, or all mailboxes.

> **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:

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

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.

Search fields

The criteria for different types of searches are defined in the drop down list to the left of the search box:

- **Keyword:** Perform text-based searching.
- **To or 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 by the file name.
- **Tags:** Search for messages by user-defined categories.

Search scope

The search scopes are defined in the drop down list to the right of the search box:

- **All Mailboxes:** Searches your Archive Manager archive for messages, or attachments, including the mailboxes you have permissions to access.
- **Other Folder**: Searches a specific folder or mailbox.You can also specify a folder or a mailbox by selecting it from the left sidebar directly.
- **Entire Archive:** Searches the local server. This option is visible only if your user credentials are authorized to "Search All Emails".

TIP: A breadcrumb bar will appear above the search box showing the path to mailbox or folder you selected after a search. Clicking a link in the breadcrumb bar will change your search scope and perform another search immediately with the new scope.

Multi-criteria searches

If you search more than one field, the criteria are cumulative by multiple active filters. That is, the search will return only results that meet ***all*** of the criteria (filters) applied. Each filter you specify therefore further ***limits*** the final results.

TIP: You can also remove one or more filters by clicking the [**x**] icon on the filter to expand your search.

How to perform a search

To perform a search:

1. Define search criteria for one search field by the drop down list to the left of the search box, as described separately under Search criteria fields below.
2. Select the search scope by the drop down list to the right of the search box.
3. Click the magnifying glass icon to execute the search.
4. Repeat step 1 and 3 to define other search criteria if any to refine your search.
5. (optional) To search the attachments using the same search criteria as well, click the **Attachments** tab in the search result.

NOTE: The search scope drop down list and the **Attachments** tab are not available when you access from a mobile device. To define your search scope in the case of mobile access, select the mailbox or folder you want to search by the left sidebar, or the **Advanced Search** feature which also enables you to search **All Mailboxes** or **Entire Archive**.

See Viewing your search results for information about the results display, and what you can do with the Results Table.

Advanced search

The Advanced Search lets you define your search criteria by multiple fields at the same time, and provides more useful search options than The Email Search form to make your search results more precise. For example, you can find the messages containing an attachment that is bigger than 20 MB. To access the Advanced Search, click the **Advanced Search** link to the right of the Email Search form on the page.

The following fields are available on the **Advanced Search** page:

TIP: You do not need to use all the search fields. Fill in only the fields that are needed for your search.

- **Saved Searches**: Your saved searches will appear in the drop down list. Selecting a saved search in the list will automatically fill the fields on the page with the search criteria defined by the saved search, so you can reuse the saved search as the basis of another search. You can also save a search, update or delete a saved search on the **Advanced Search** page:
  - **Save a search**: Select [`new search`] from the drop down list, define the search criteria by the fields on the page, and click the save icon next to the drop down list. Enter a name for the search and Click **Save**.
  - **Update a saved search**: Select the saved search you want to update from the drop down list, change the search criteria by the fields on the page, and click the save icon.
  - **Delete a save search**: Select the saved search you want to delete from the drop down list, click the trash icon, and click **OK** to confirm the deletion.
- **Keyword**: This field lets you perform text-based searches. See General text search guidelines for more information. You can select the corresponding check boxes to specify whether to search in the message subject, body and attachment:
  - **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.
- **Folder**: This field lets you define the Search scope.
- **People**: This section lets you find messages that have (or have not) been sent to or received from a particular person or persons.
  - **To**: This field is used to find messages that have (or have not, if you select `Not Contains`) been sent to a particular person or persons.
  - **From:** This field is used to find messages that have (or have not, if you select `Not Contains`) received from a particular person or persons.
  - **To or From**: This field is used to find messages that have (or have not, if you select `Not Contains`) been sent to or received from a particular person or persons.

    TIP: The fields above support for multiple values, and allow you to enter all or part of an email address or display name, as described in the To or From section.
  - **Exclude Cc and Bcc for "To" and "To/From"**: If this check box is selected, Archive Manager will only find the messages that have been sent to or received from a particular person or persons as a primary recipient.
- **Date**: This field lets you search for the messages received within a Date Range.
- **Tags**: This field lets you search for messages associated with (or not associated with, if you select `Not Contains`) one or more Tags.
- **Attachments**: This field lets you search for messages containing a specific attachment, or the attachment itself by the file name.
  - **Unlimited (default)**: When this option is selected, you search for messages no matter they contain attachments or not.
  - **No attachments**: This option is used to search for messages without containing any attachments.

        - **One or more attachments**: This option is used to search for messages containing one or more attachments, or the attachment itself. When this option is selected, you are also allowed to specify the following attributes for the attachment(s):
            - **File Name**: Specifies the file name of the attachment. You can enter the file name with asterisk (*) to perform a wildcard search. The asterisk (*) can be placed at the beginning, end, or in the middle of the file name.
            - **File Size**: Specifies the minimum size and/or the maximum size of the file.
            - **File Type**: Specifies the file type(s). Separate multiple types by semicolon, for example, `txt;pdf;docx`. Use the symbol "!" to exclude a file type, for example, `!txt;!pdf`, this will search for messages that do not have TXT or PDF attachment(s).
- **Message Type**: This field lets you search for messages by their item type and message class.
    - **Message Type**: Specifies the message type.
    - **Message Class**: Specifies the message class.
- **Search Remote Servers**: When this check box is selected, you can search the local server and all Federated Search Instances. This option is visible only if your user credentials are authorized to "Search All Instances".

Search criteria fields

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

Keyword (text-match search)

The **Keyword** field 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.

NOTE: When you search by keyword, Archive Manager returns only the top 5,000 results by default, and you can change it on Configuration Console by the setting **Full Text Max Results**.

To define a search for a message (including subject and body) or attachment containing a specific word or phrase:

1. Enter the word, phrase or other text string that you want the feature to find. See General text search guidelines for more information.
2. Select the search scope by the drop down list to the right of the search box.

TIP: The Advanced search page allows you to specify whether to search in the message subject, body and attachment when you search for messages by keyword.

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

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

General text search guidelines

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

- **Case:** All text-string searches are case-***in***sensitive.
- **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:

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-***in***sensitive, 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 1. Boolean operators

	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**
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 *prohibit* 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:
  - + - && || ! ( ) { } [ ] ^ " ~ * ? : \

To or From

The **To or From** field lets you find messages that have been sent to or received from a particular person or persons. In this field, 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**).

TIP: A search suggestion list will show up as you type in the field.

This field supports for multiple values. When multiple values are entered in the field, the search will return emails that contain any of the listed addresses. For example, a search for emails To or From 'john@domain.com; fred@domain.com' will return both emails to or from John and emails to or from Fred, plus any emails to both of them.

TIP: The Advanced search page provides more options for you to search by people.

Date Range

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

Choose one of the following 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.
- **Custom Range** (and related fields): Messages received within a specified period. To specify a period, select one date from the **Start Date** calendar, and select another one from the **End Date** calendar.

Attachments

The **Attachments** search lets you search for an email containing a specific attachment, or the attachment itself by the file name.

To find an attachment, enter the file name of the attachment. You can enter the file name with asterisk (*) to perform a wildcard search. The asterisk (*) can be placed at the beginning, end, or in the middle of the file name.

TIP: The Advanced search page allows you to specify the file name, minimum/maximum file size and file type for the attachment.

Tags

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.

To search for messages associated with one or more tags, select the tag(s) from the tag list shown as you type in the filed.

Viewing your search results

Messages matching your search criteria will be displayed and the **Active Filter** information panel will indicate what search criteria have been used. See the Managing search results section for more information.

Saving and reusing searches

The **Save Search** feature 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.
2. Click **Save Search**.
3. Enter a name for your search in the **Search Name** field.
4. Click **Save** to save your search.

The names of saved searches appear under **Saved Searches** in the sidebar.

TIP: You can also save a search, update or delete a saved search on the Advanced search page.

Executing a saved search

To execute a saved search, click the title of the saved search in the **Saved Searches** tab (in the 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

- Using a saved search as a starting point**:** Refine or redefine the criteria of the saved search to perform a new search.
- Using a saved search as the basis for a new saved search**:** Create a new saved search based on the criteria for the existing saved search.
- Renaming a saved search: Change the name of a saved search.
- Deleting a saved search**:** Remove a saved search.

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 as filters in the **Active Filter** panel.
2. Perform search as described in the How to perform a search section.

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 displayed as filters in the **Active Filter** panel.
2. Perform search as described in the How to perform a search section.
3. Click **Save Search** and specify a name for the new search in the **Search Name** field.
4. Click **Save**. The **Saved Searches** tab in the sidebar is updated with the title of the newly saved search added to the list of menu items.

Renaming a saved search

To rename a saved search:

1. Under the **Saved Searches** tab in the sidebar, hover over the name of saved search you want to rename, a more options icon […] will appear to the right of the saved search name.
2. Click the icon […] and select **Rename**.
3. Enter a new name for the saved search in the text box.
4. Click the check mark icon.

Deleting a saved search

To delete a saved search:

1. Under the **Saved Searches** tab in the sidebar, hover over the name of saved search you want to rename, a more options icon […] will appear to the right of the saved search name.
2. Click the icon […] and select **Delete**.
3. Click **OK** to confirm the deletion.

3

Working with messages

- Managing search results
- Using message tabs
- Using message toolbar
- Reconstructing messages using the Archive Manager Outlook Form
- Reconstructing messages using Outlook Web App (OWA) reconstruction tool

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.
- Copy one or more messages to another folder.
- Print a message.
- 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.

Exporting your search results

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

NOTE: The **Export All** feature is not available when you access from a mobile device.

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.

Opening messages

To open a message in your search results, click the subject of the message you want to open. The message slides in from the right side of the screen.

For a message window, the following tabs are displayed:

- Message
- Headers

- Journal Report
- Access History
- Source Properties

The message window 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.

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.

You can execute the following actions for the message in the 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.

- Copy
- Tags
- Comment
- Print
- View Images

NOTE: The **Copy**, **Tag** and **Comment** options are visible only if you have the proper permissions.

Selecting messages in your search results

If you select a message or messages from your search results by checking the check box next the message subject, you can perform the following actions to the message(s) with the panel above the search results:

- Copy to another folder
- Add tags (Visible only if you have the proper permissions.)
- Remove tags (Visible only if you have the proper permissions.)
- Remove from folder: This option is only available when the message(s) you select is from a Custom Mailbox folder.

NOTE: When you add or remove tags, the option **Include Parent Messages** will be available if you have the permission “Search All Emails”. This allows you to add tags to the messages you select and their parent messages (if any) at the same time, or to remove tags from messages and their parent messages. The parent message refers to the message that contains another message as attachment.

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 **Related 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 singe instancing. (Any attachment that contains the same content is only archived once, but the individual names are archived.)
- An **Access History** tab that displays a log of users that have viewed or downloaded the attachment.

Using message tabs

Archive Manager provides additional information related to a 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).

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 me** 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.

Source Properties

The **Source Properties** tab of the message shows the source property list of the message from the Exchange mailbox system.

Using message 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 window.

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

- **Reply**:
  - 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.
- Copy: Copy the message to another folder in a mailbox.
- Tags: View the current message tags, or add/remove a tag.
- Comment: View the current message comments, or add a new comment.
- 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.
- Export: Export the message as MIME format.

- Print: Print the message using the standard browser printing functionality.

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.

Copy

To copy the message to another folder:

1. Click **Copy**, and select **More Folders**.

   The dialog box **Copy 1 message(s) to folder** opens.

2. In the dialog box, select the folder where you want to copy the message to, or create a new folder, and click **Copy**.

   To create a new folder, hover on a mailbox or folder name, and click the more options icon [...] and select **New Folder**.

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.

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

To add one or more tags:

1. Click **Tags** and select **Add new tags**.
2. Click on the text box, and select one or more tags available in the list.
3. Click **Submit**.

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 remove a tag:

1. Click **Tags** and select the tag you want to remove.
2. Click **Yes** to confirm.

NOTE: When you add or remove tags, the option **Include Parent Messages** will be available if you have the permission “Search All Emails”. This allows you to add tags to the messages you select and their parent messages (if any) at the same time, or to remove tags from messages and their parent messages. The parent message refers to the message that contains another message as attachment.

Comment

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

To add a comment to a message:

1. Click **Comment**.
2. Enter your comments.
3. Select whether the comment is private.
4. Click **Add Comment** to save your comment.

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.

Export

To export the message as MIME format, click **Export** in the Toolbar.

NOTE: The **Export** option is not available when you access from a mobile device.

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.

Reconstructing messages using the Archive Manager Outlook Form

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

Reconstructing stubbed messages with Windows Authentication

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

In order for stubbed 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**.

Opening stubbed messages from a shared folder

To open stubbed 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 Outlook Web App (OWA) reconstruction tool

The Outlook Web App (OWA) reconstruction tool is installed through the Download Tools page of the Administration Website. For more information about the tool, refer to the *Download Tools* chapter of the Archive Manager Administration guide.

To reconstruct messages in the OWA with Exchange 2019, 2016 and 2013:

- Double-click a message in the message list to open it, and click **Quest Archive Manager** to reconstruct the message in the popup window.
  Or,
- In the preview reading pane in non-conversation mode, click **Quest Archive Manager**. The message will be reconstructed and displayed in the reading pane.

TIP: If the message body disappears in the reading pane after the message has been reconstructed for a while, refresh the web page to show it again.

To reconstruct messages in the OWA with Exchange 2010:

- 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 **Reconstruct from Archived**. The message will be reconstructed and displayed in the reading pane.

TIP: For Exchange 2010, preview reconstruction only supports Non-Conversation mode. Double-click reconstruction supports Conversation and Non-Conversation modes. To change to Non-Conversation mode, in the Arrange by... menu of the Outlook Web App, deselect the **Conversation** checkbox.

4

Standard mailboxes

- About standard mailboxes
- Security

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.

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 **Standard Mailboxes** tab in Archive Manager, and can be displayed or hidden by expanding or collapsing the tree structure of the menu.

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 m**ailbox** or folder from the **Mailboxes** menu, in the left sidebar. A list of the messages in the **mailbox** is displayed.

NOTE: Selecting a mailbox or folder essentially executes a search in Archive Manager,and changes the selected value of the drop down list to the right of the search box.

2. Use the **Email Search** form to further refine the search if required.

Security

Security can be assigned to users to allow them to have access to your standard mailbox. For more information, see Share my mailbox with other users on page 6.

5

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** tab of the left sidebar.
2. Enter a mailbox name and click the check mark icon.

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

1. Right-click an email message and select **Copy > More Folders**.
2. Click **+New Mailbox** in the **Copy 1 message(s) to folder** dialog box, enter a name for the mailbox, and click the check mark icon.

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. Hover over the custom mailbox you want to add the folder to, and click the more options icon [...] and select **New Folder**.
2. Enter a name for the folder and click the check mark icon. 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 by checking the check box next to the message subject.
3. Select **Copy** > **More Folders**.

> **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**.

Rename a custom mailbox

To rename a custom mailbox:

1. Hover over the custom mailbox name, and click the more options icon [...] and select **Rename**.
2. Enter the new name for the custom mailbox in the text box and click the check mark icon.

Delete a custom mailbox

To delete a custom mailbox:

1. Hover over the custom Mailbox name, select the more options icon [...] and click **Delete**.
2. Click **OK** to confirm the deletion.

Security

Once custom mailboxes have been created, Archive Manager provides the capability of assigning security to them. For more information, see Share my mailbox with other users on page 6.

6

My Search Log report

My Search Log 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. Select **My Search Log** from the drop down menu in the top right corner of the screen.
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.

Archive Manager also provides other types of reports which can be accessed from the Administration Website. For more information, refer to the Archive Manager Administration Guide.

7

Working with hosted Exchange mailboxes

- Overview
- Enabling access to a hosted Exchange mailbox
- Disabling access to a hosted Exchange mailbox

Overview

In order to support hosted Exchange, the Archive Manager website features a **Configure Archive Access** page that allows users to enable and disable access to their mailbox accounts in a hosted Exchange environment.

To open the **Configure Archive Access** page, click on the drop down menu in the top right corner, and select **Configure Archive Access**.

The **Configure Archive Access** page provides a list of your remote mailbox accounts, as well as the status of delegating the remote mailbox access to proxy credentials. The status can be one of the following:

- **Pending**: The delegating process is in progress.
- **Success**: Delegating mailbox access to (at least one set of) proxy credentials is successful.
- **Fail**: Delegating mailbox access to all proxy credentials has failed.

Enabling access to a hosted Exchange mailbox

Each hosted Exchange mailbox can have one owner, and only the owner can change the delegation settings for that mailbox. In order to configure a mailbox, you must be the owner. If a mailbox doesn't have an owner, you can become the owner by entering your Archive Manager login and the remote mailbox password when you enter your delegation settings when adding remote access. Only the owner of the remote mailbox can configure it.

To enable access to your hosted Exchange mailbox

1. On the **Configure Archive Access** page, click **+ADD REMOTE ACCESS**.
2. Enter the following information:
    - Local Password (Passwords are not stored.)
    - Remote Email Address (If empty)
    - Remote Password
3. Select **Enable** for **Archive Access**.
4. Go to the **Agreement** section and read the text. Select the **I have read and understood the agreement** checkbox.

5 Click **Configure**.

This process may take several minutes, as the system needs to contact the remote server. If all the information has been entered correctly and no issues are encountered, a message is displayed at the top of the screen indicating success. If errors are encountered, an error message is displayed at the top of the screen.

To enable multiple accounts, type in the new remote account email address, and repeat the steps listed above. All accounts will be listed on the **Configure Archive Access** page. If enough accounts are listed, a scroll bar is displayed.

Disabling access to a hosted Exchange mailbox

Disabling remote access works the same as enabling, except that the **Disable** radiobox must be selected for **Archive Access**. Any disabled accounts still appear in the list on the **Configure Archive Access** page, but will indicate that they are disabled.

When you select the **Disable** radiobox for **Archive Access**, a radio box **Accessible by Archive Manager Administrator** will appear to ask whether you want to grant administrator access to the mailbox. Clicking **Yes** makes all existing messages public to any Archive Manager administrator.

NOTE: After you disable access to the hosted Exchange mailbox, Archive Manager will stop archiving messages from your hosted mailbox immediately, but the mailbox will be still visible to you in Archive Manager for a while until the operation is complete (the status shows Success).

About us

Quest provides software solutions for the rapidly-changing world of enterprise IT. We help simplify the challenges caused by data explosion, cloud expansion, hybrid datacenters, security threats, and regulatory requirements. We are a global provider to 130,000 companies across 100 countries, including 95% of the Fortune 500 and 90% of the Global 1000. Since 1987, we have built a portfolio of solutions that now includes database management, data protection, identity and access management, Microsoft platform management, and unified endpoint management. With Quest, organizations spend less time on IT administration and more time on business innovation. For more information, visit www.quest.com.

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 enables 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.