

Quest® Archive Manager for Exchange 8.9

Outlook Add-in User Guide



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Legend



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



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

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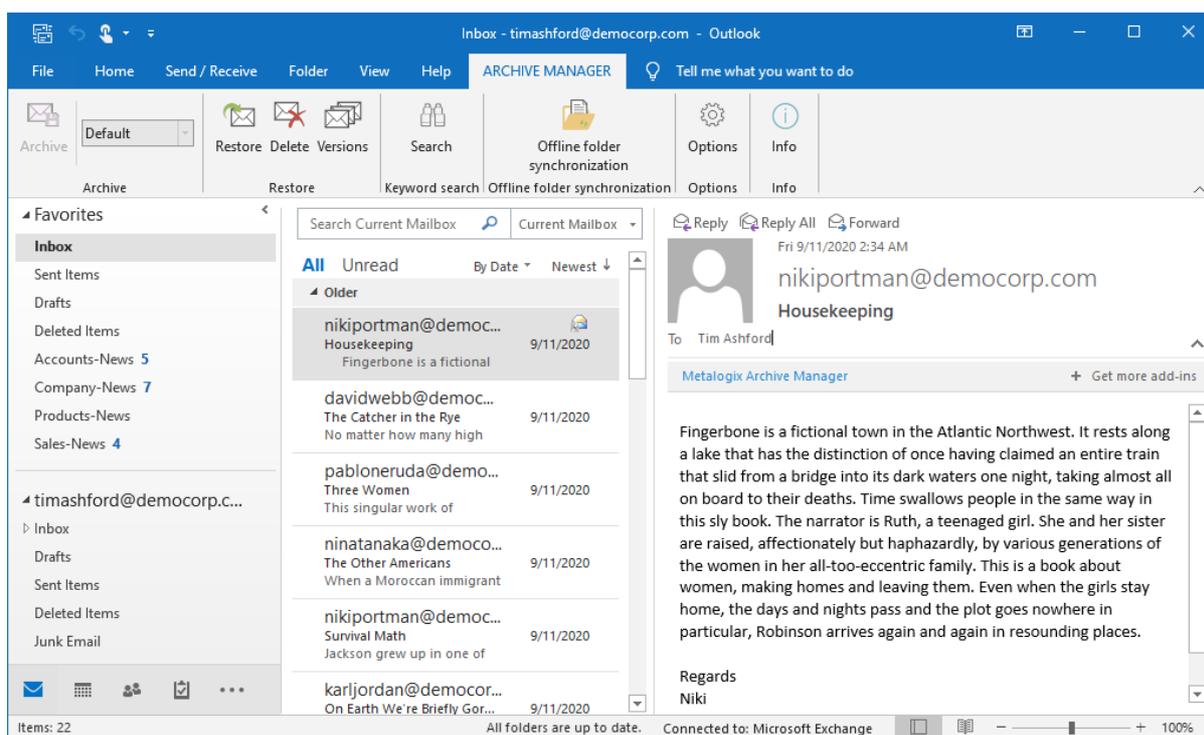
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Introduction

The 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.

i | **NOTE:** Native rehydration or exports are intended for small data sets. For operations on large data sets, use a specialized utility such as [Quadrotech Archive Shuttle](#) (QAS).

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 *Archive Manager for Exchange 8.9 Outlook Add-in Installation Guide*.



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

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

Icon	Description
	Archived email that has been forwarded

i **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%\Quest Software\Archive Manager\Log\Archive Manager` folder.

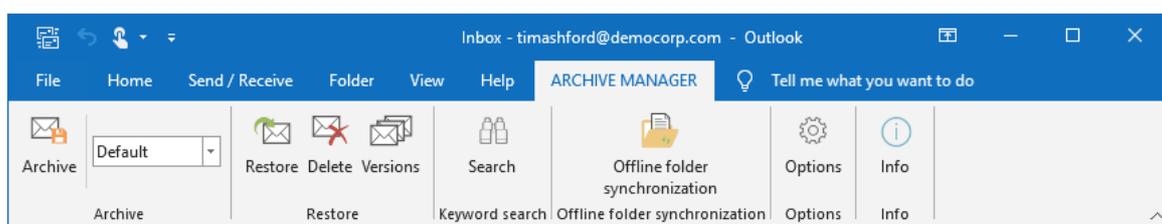
Outlook® is a registered trademark of Microsoft Corporation. All features of the Archive Manager Outlook Add-in are valid for Outlook 2016 and later.

Archiving emails

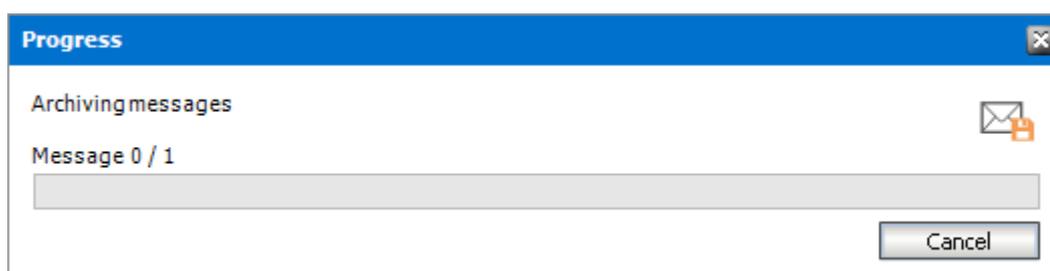
You may choose to archive several e-mails or documents at once. When archived, emails will be residing in the archive until its retention time elapses. The archived email can be even deleted from Outlook, however, it will be still accessible e.g. via keyword search.

Steps to archive emails

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



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



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

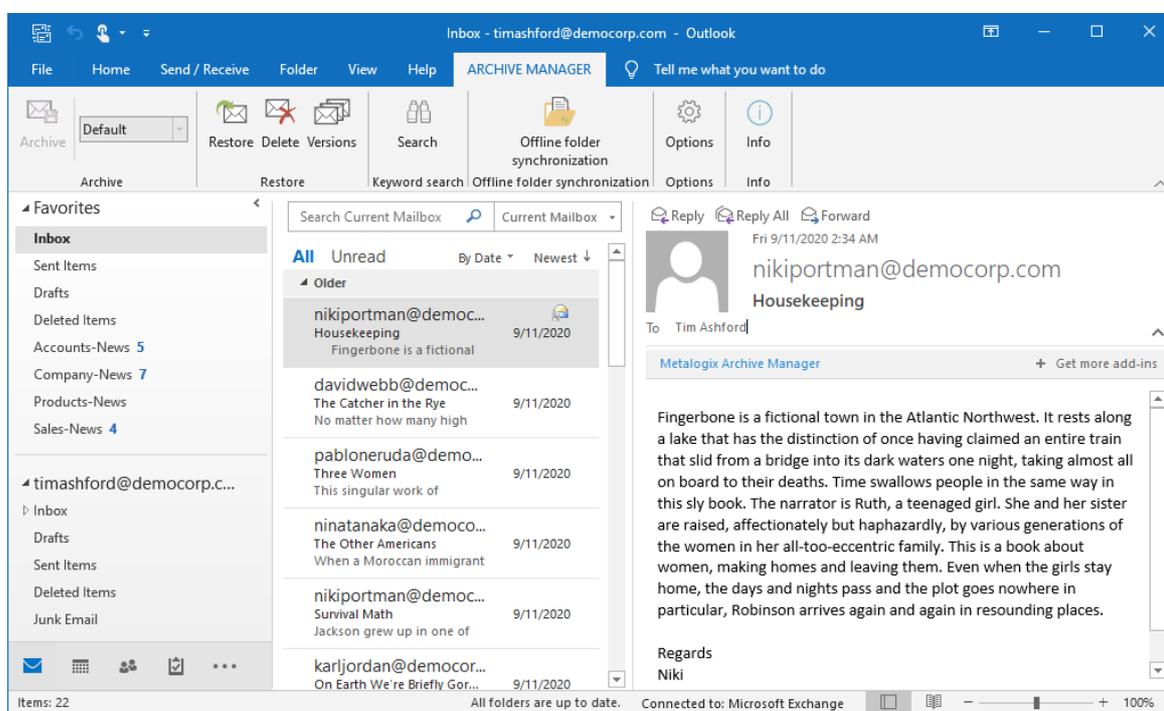


Restoring archived emails

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

Steps to restore archived emails

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



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



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

5. When the restoration starts the Progress window opens.



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

Deleting archived emails

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

Steps to delete archived emails

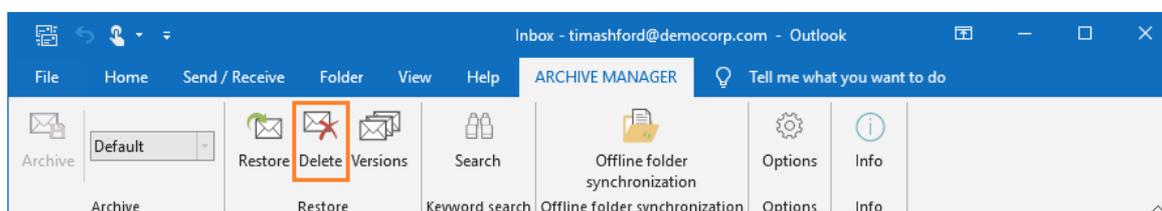
i **NOTE:** To ensure the delete process is successful, you must deactivate the Cached Exchange Mode in Outlook.

To deactivate Cached Exchange Mode in Outlook:

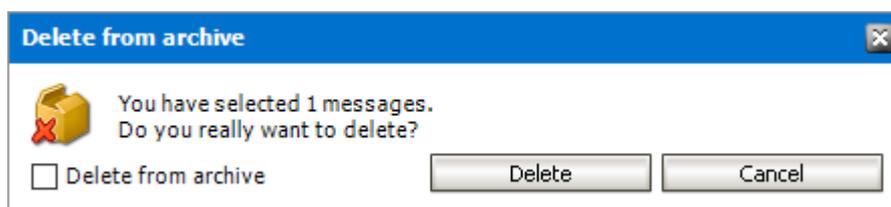
1. Click **File > Account Settings > Account Settings**.
2. Click the Exchange or Microsoft 365 account from the *Email* tab, and then click **Change**.
3. Under **Offline Settings**, uncheck **Use Cached Exchange Mode**. If you're a Microsoft 365 subscriber, uncheck **Use Cached Exchange Mode to download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



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



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

Search

In this chapter:

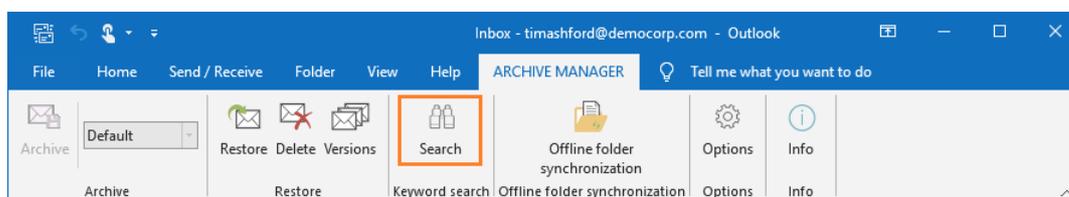
- [Keyword Search](#)
- [Advanced Search](#)
- [How to build search queries](#)

Keyword Search

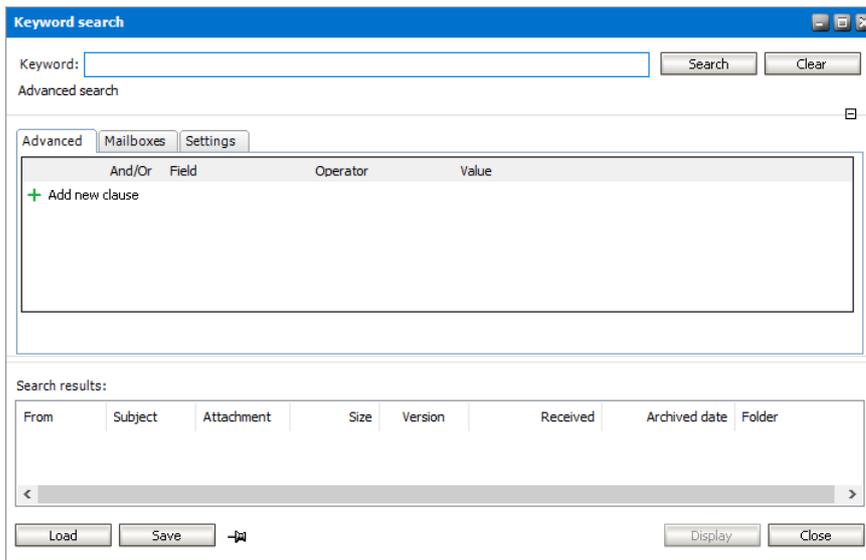
Keyword search is used for searching through archived emails and attachments. It is possible to search for text in pictures (OCR search) although this technology has some limitations. For example, tiny text may not be correctly recognized. Keyword search can be used for searching through archived and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

Steps to run a keyword search

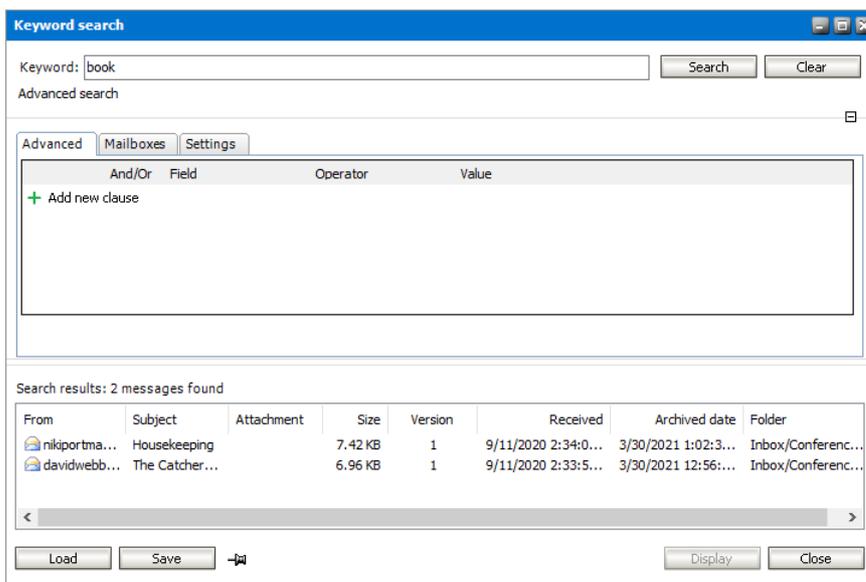
1. Click the **Archive Manager** addin.
2. Click **Search** from the ribbon.



3. The **Search** window opens.



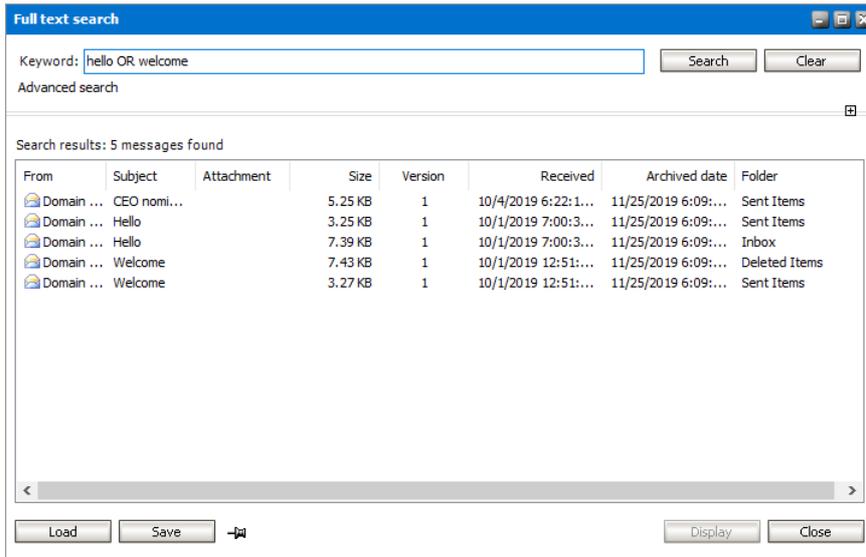
4. Enter the keywords in the **Search for the word(s)** field. The keyword is searched in the subject, email body and attachments.
5. The result of the search is then displayed in the *Search results* window.



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

Search Expressions

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



Example 1:

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

Example 2:

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

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

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

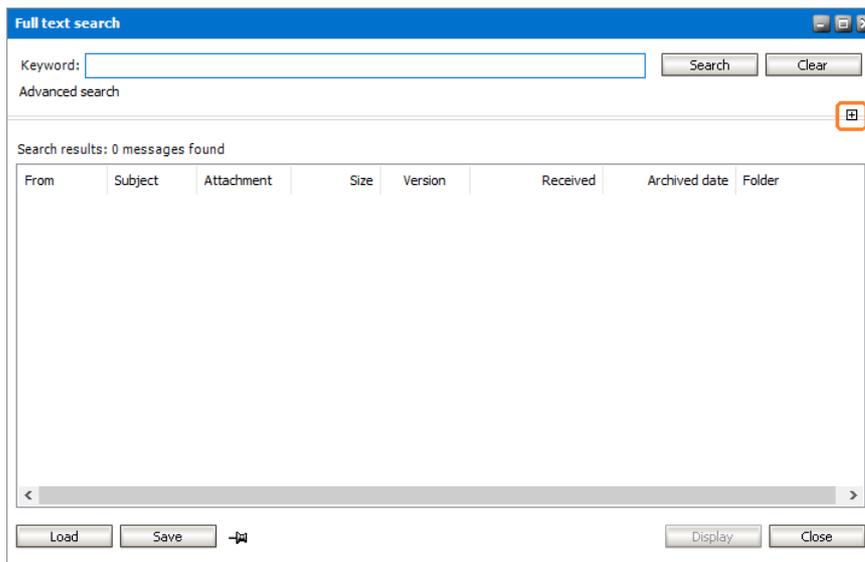
You can use the Save / Load buttons to save / load search criteria you have specified. It is especially useful e.g. when you have set special settings for Advanced search (see further).

Advanced Search

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

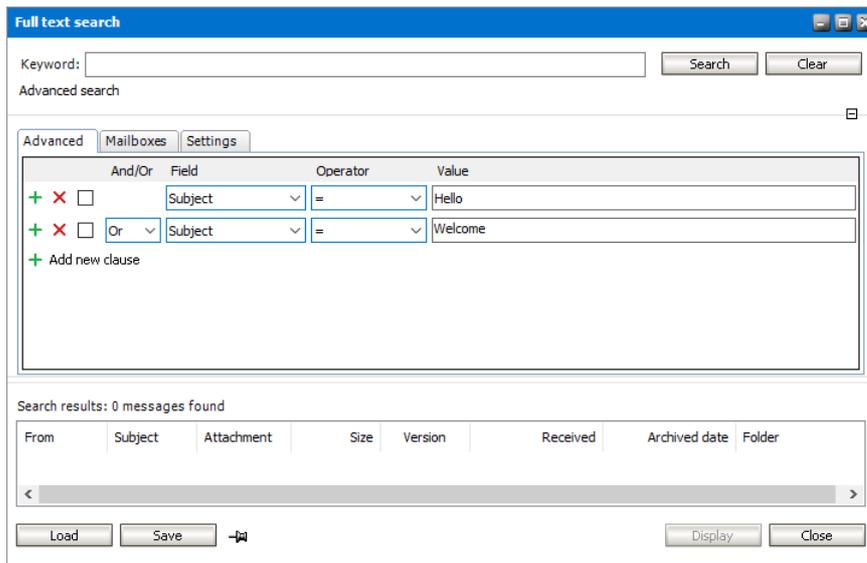
Steps to use advanced search

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



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

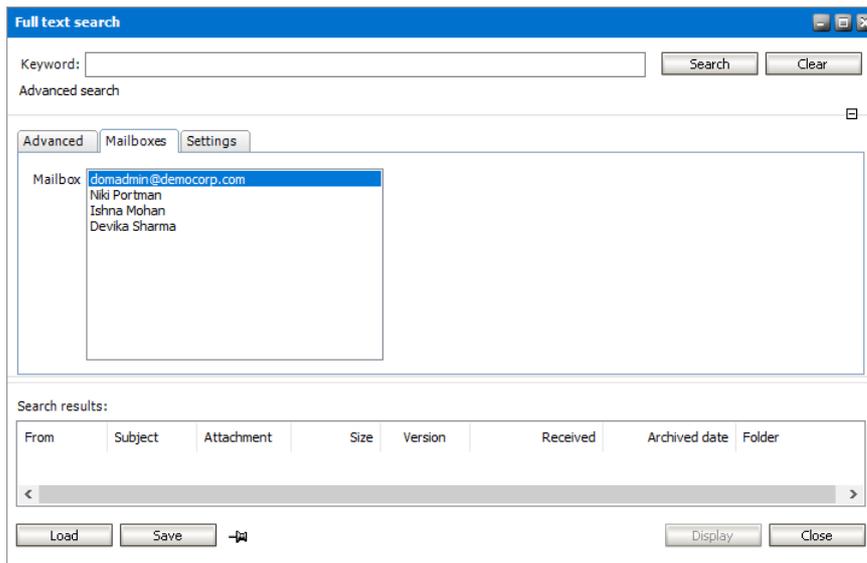
i | **NOTE:** You can group clauses to create nested search criteria by selecting consecutive check boxes and clicking the  icon.



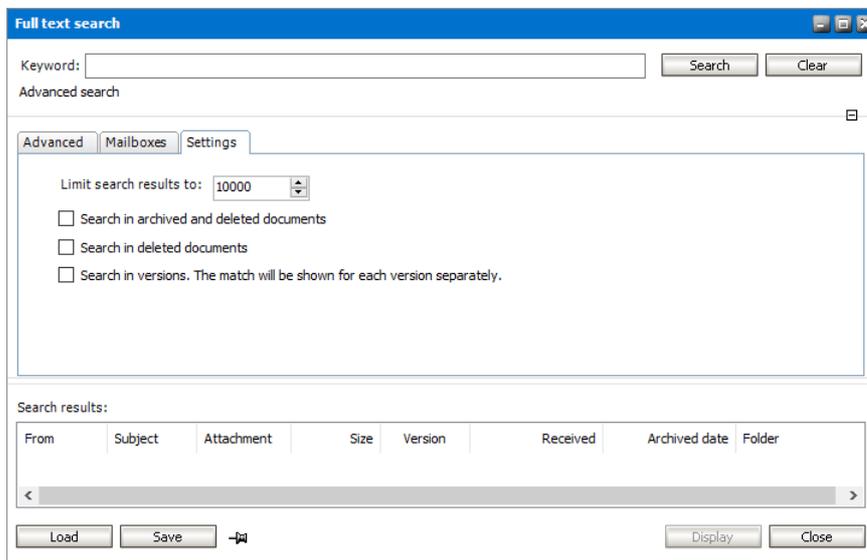
5. To view the scope of the search on mailboxes, click the **Mailboxes** tab. By default only the current mailbox is added. You must select more mailboxes manually if you want to search additional mailboxes.

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

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



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



Configure the settings as described below:

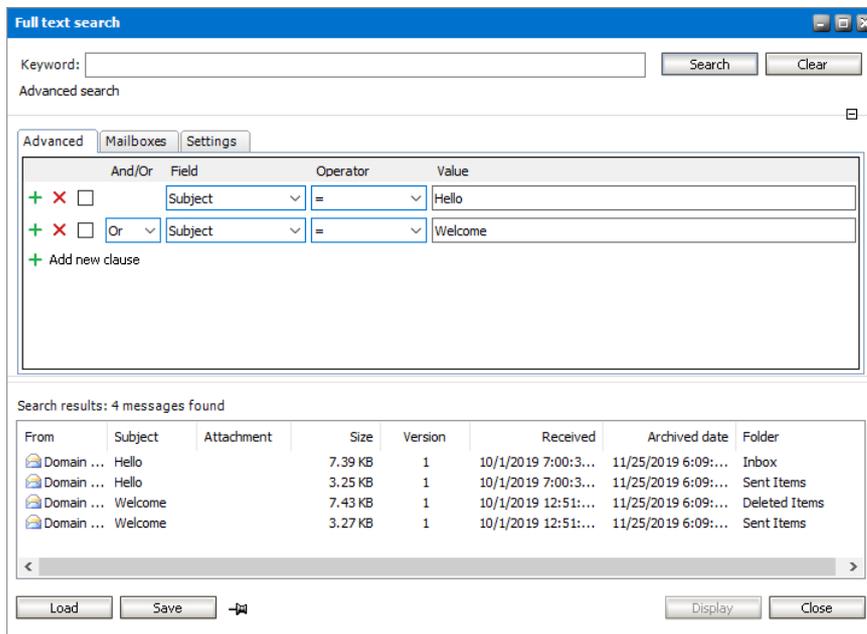
- a. **Limit search results to** - the number of emails that are returned in the search result list.
- b. Search options allow you to specify the category of documents to search.
 - *No selection* - only archived documents are searched. Previous versions of these documents are not included.

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.



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:

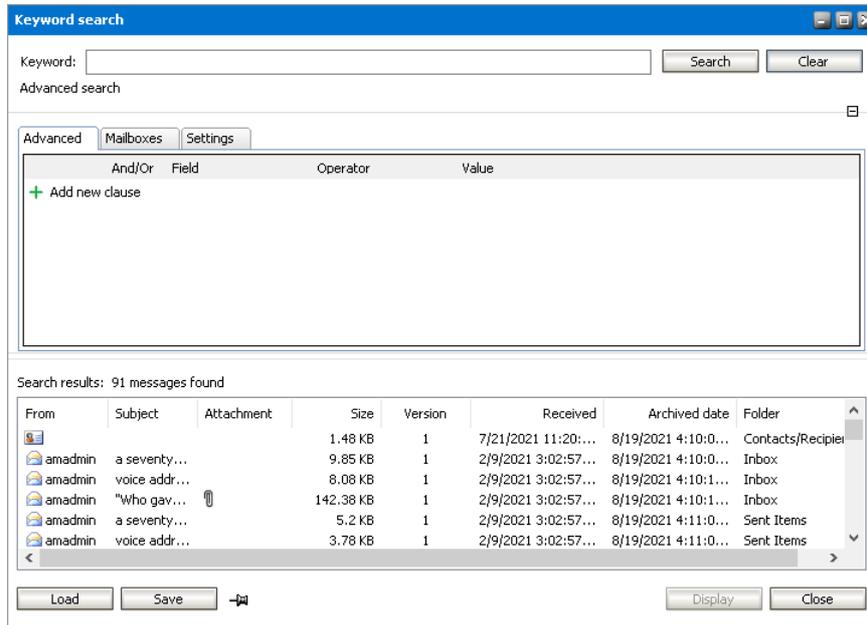
- [Simple Conditions](#)
- [AND/OR operators](#)
- [Grouping](#)
- [Keyword Search](#)

Simple Conditions

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

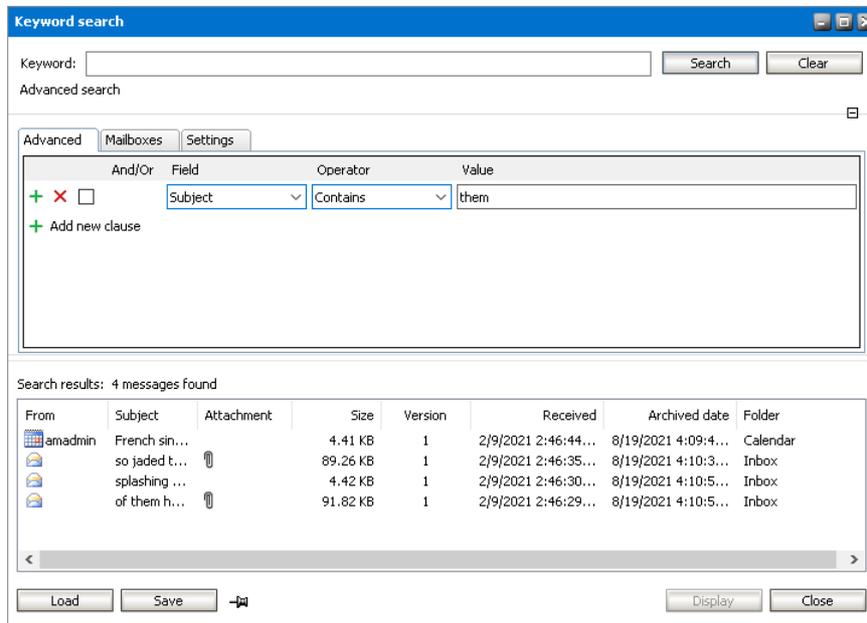
Example 1

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



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".

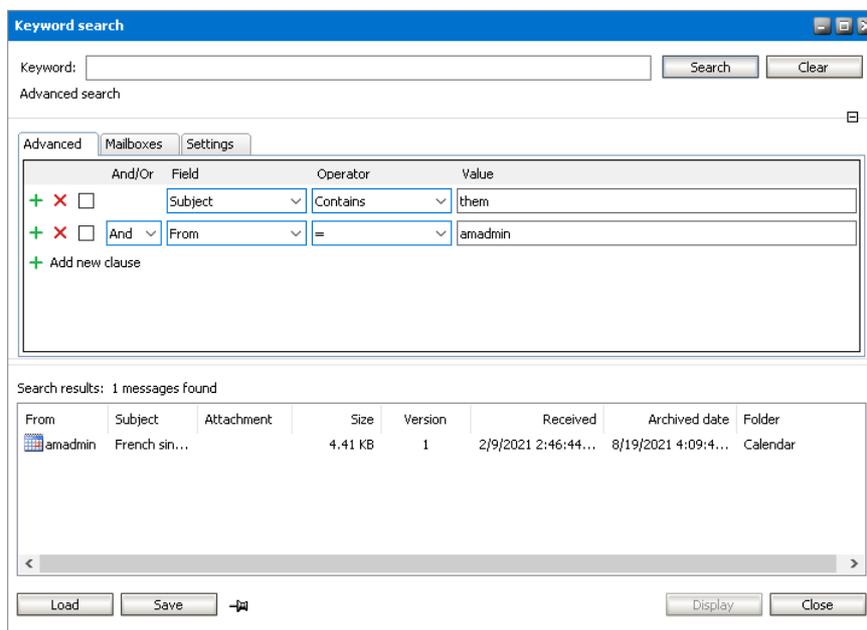


AND/OR operators

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.

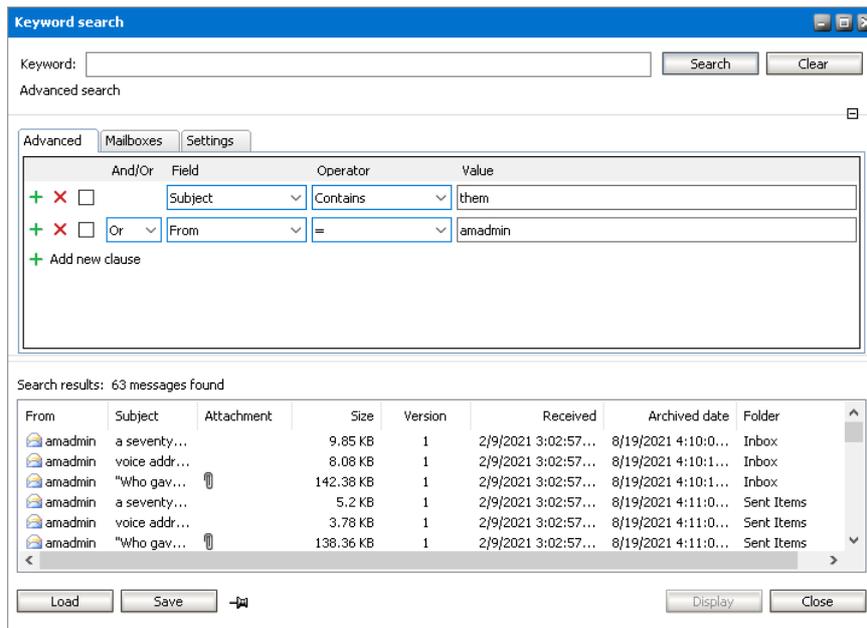
Example 1

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



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:

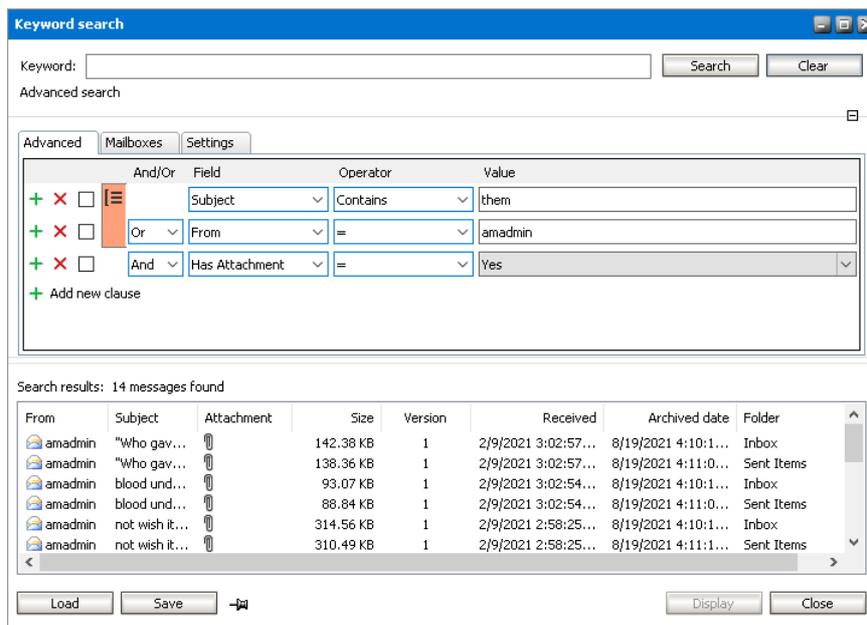


Grouping

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:



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

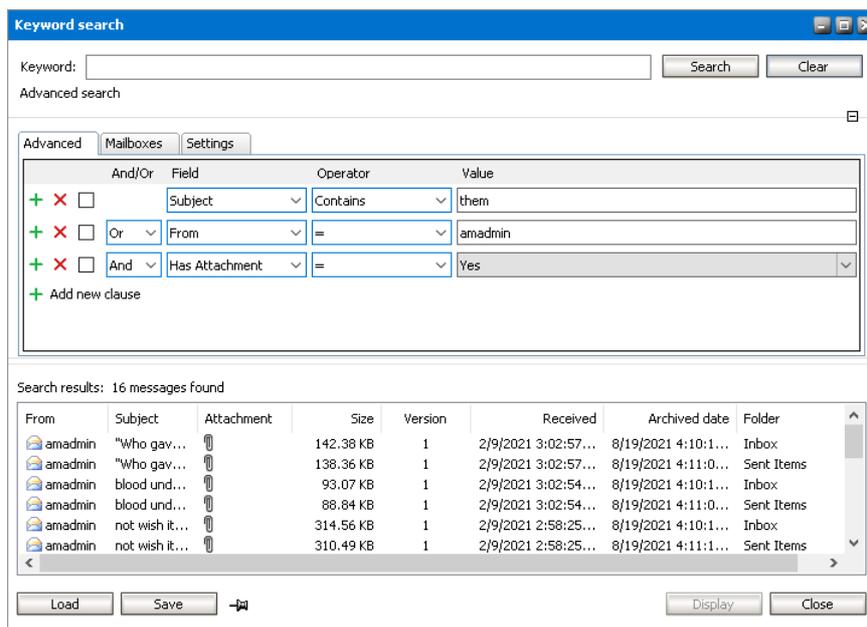
We can split this search condition into two parts

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:



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

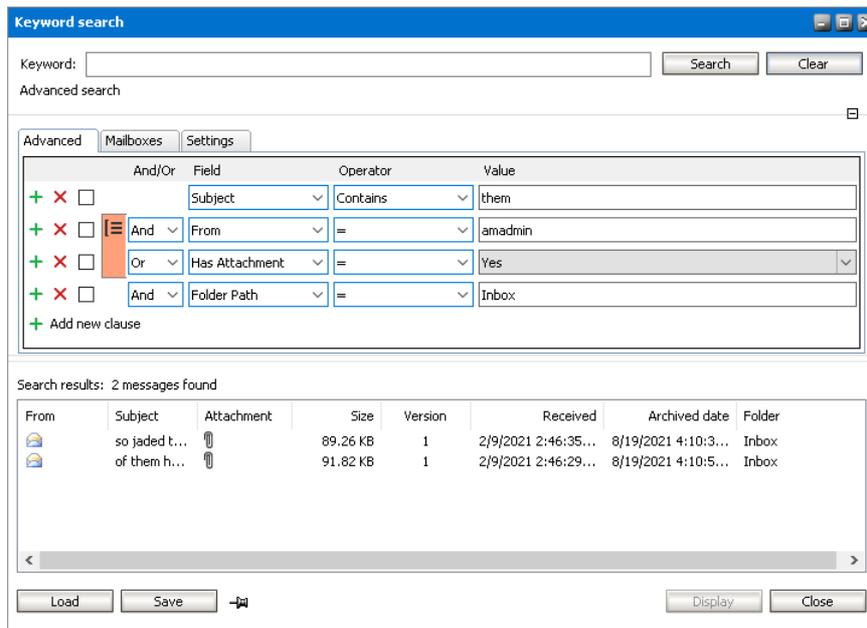
This query can be split into two parts

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:



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

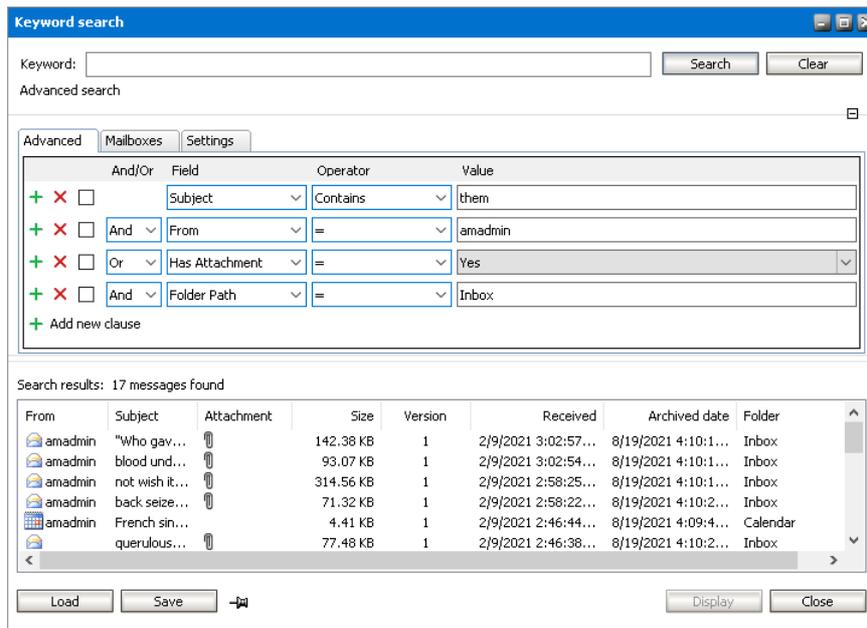
This query can be split into three parts

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:



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

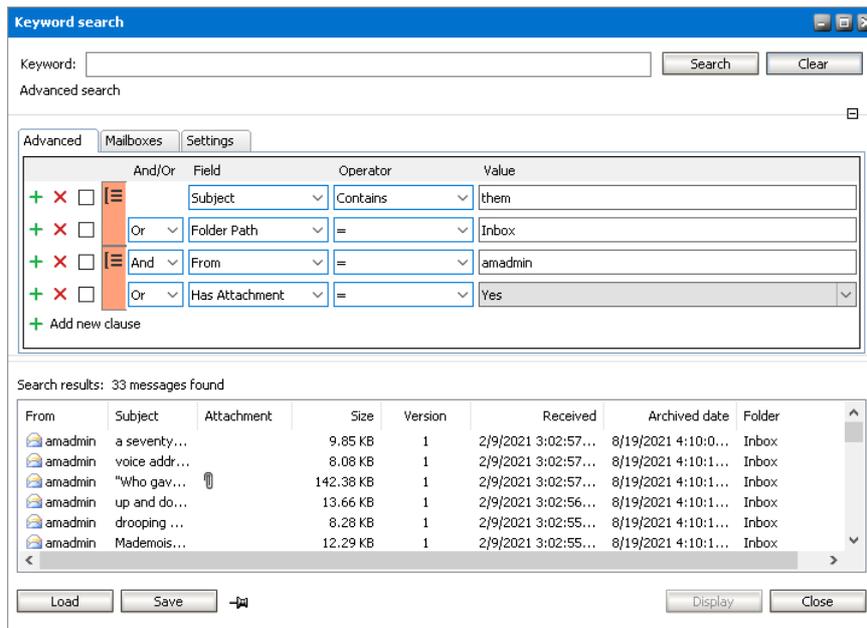
This query can be split into two parts

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:



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

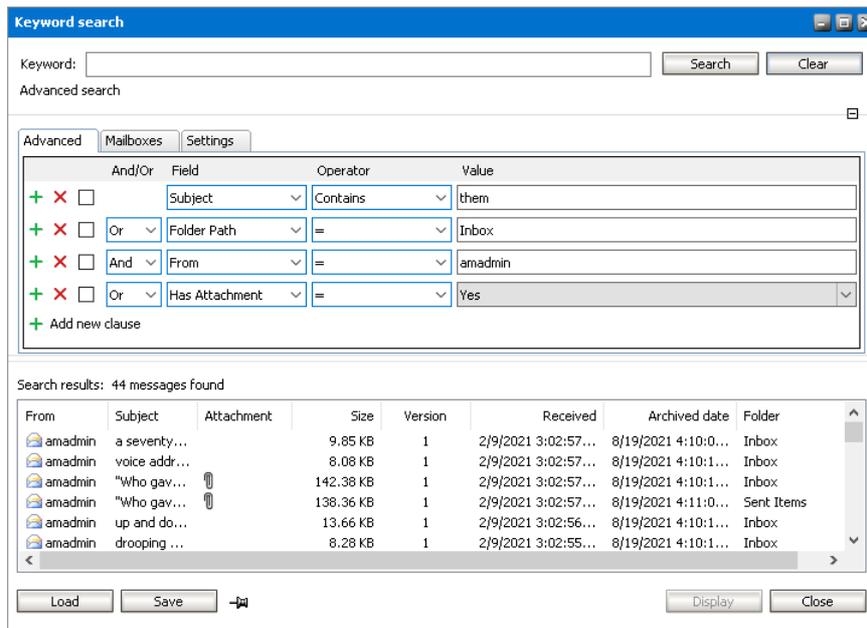
This query can be split into two parts

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:



Query: 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

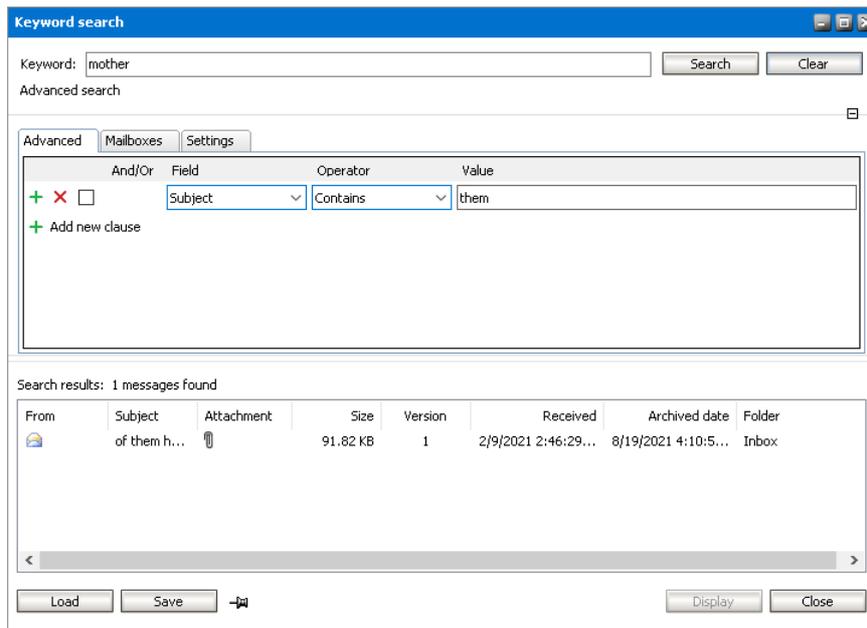
The AND operator has a higher priority so the conditions with the AND operator must be fulfilled first. In this case the search result will contain items where *Subject* must contain the word "them" or folder path must be "Inbox" and *Sender* must be "amadmin" or the item has an attachment.

Keyword Search

Keyword search provides a fast and flexible search for keywords in the email Subject, body, and attachments of messages in 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:



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.

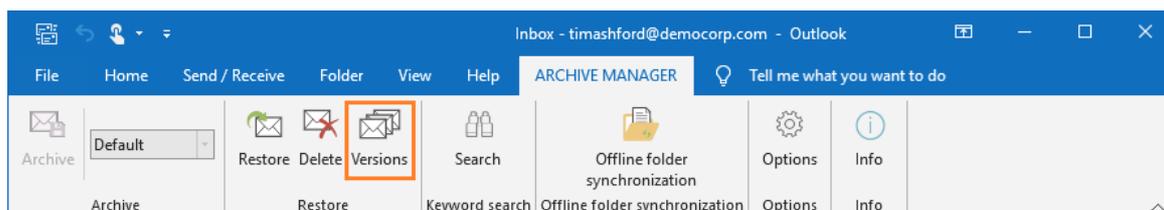
Versions

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.

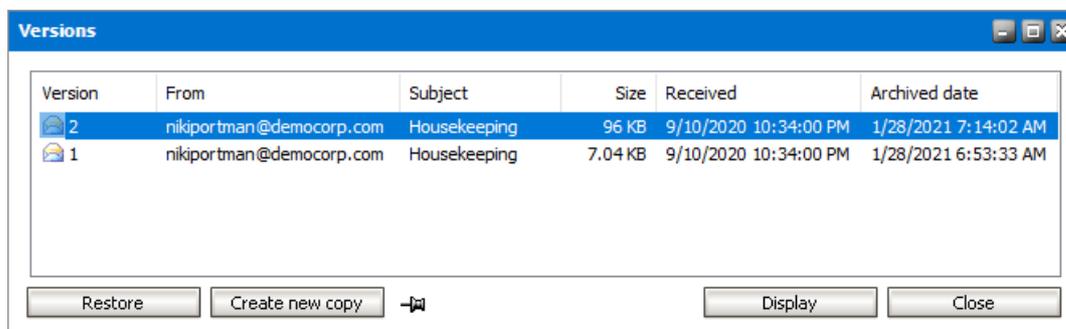
Different versions of an archived email can be checked in the *Versions* window.

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.



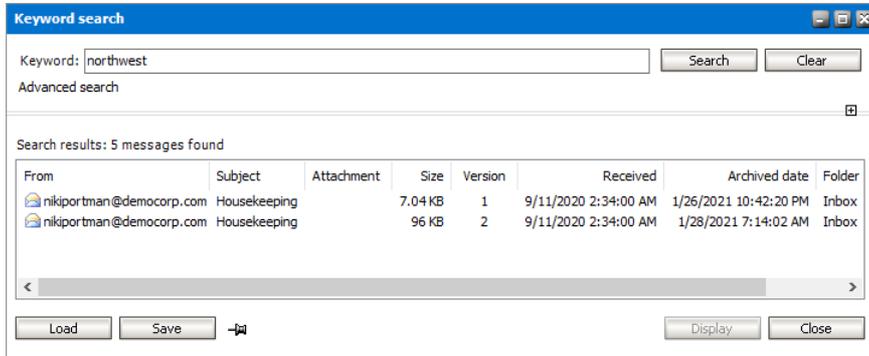
The actions you can perform in the Versions window are described below:

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



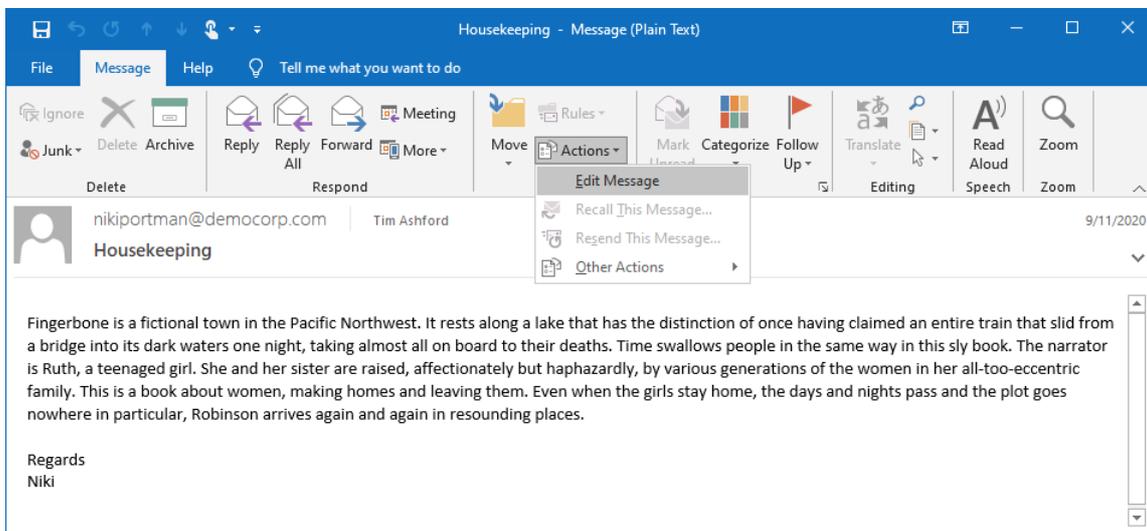
NOTE:

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



Steps to create a new version of an archived email

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



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

Offline synchronization

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

Steps to synchronize archived emails for offline use

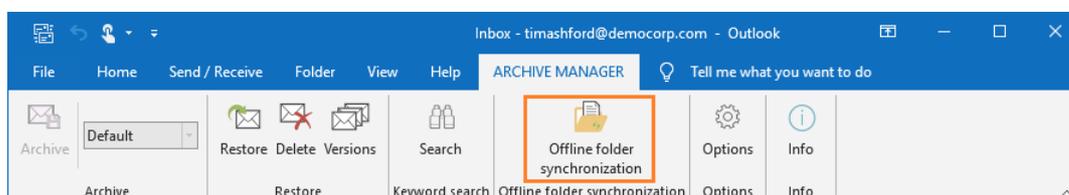
i **NOTE:** To ensure the offline folder synchronization process is successful, you must deactivate the Cached Exchange Mode in Outlook.

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**.



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

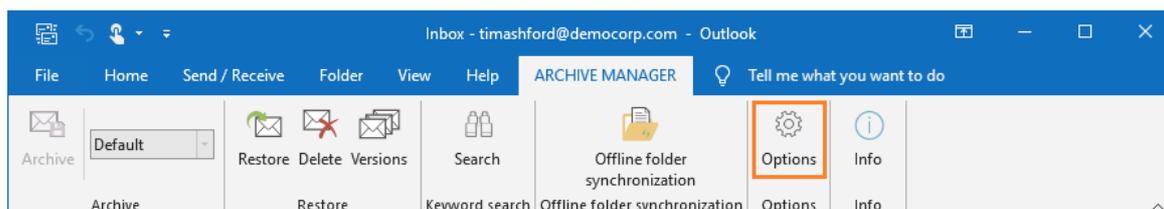
Options

In this chapter:

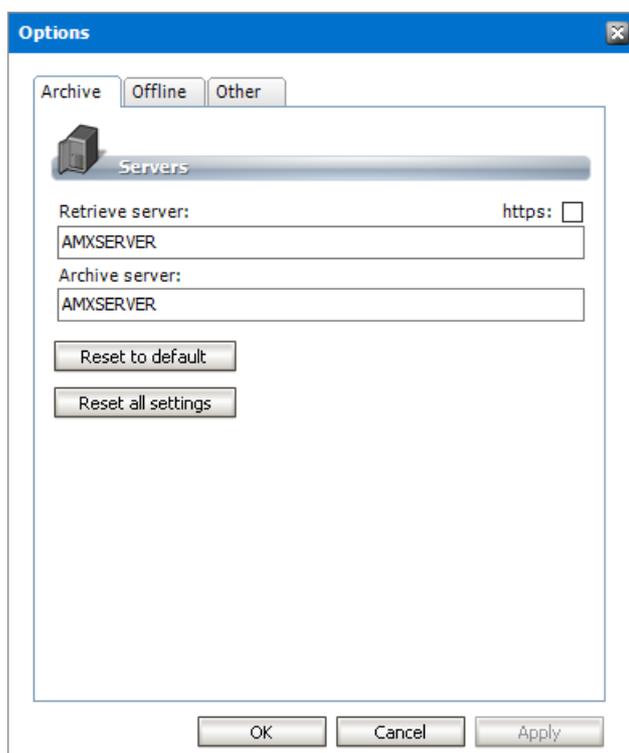
- [Archive options](#)
- [Offline options](#)
- [Other options](#)

Archive Options

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



3. Click the **Archive** tab.

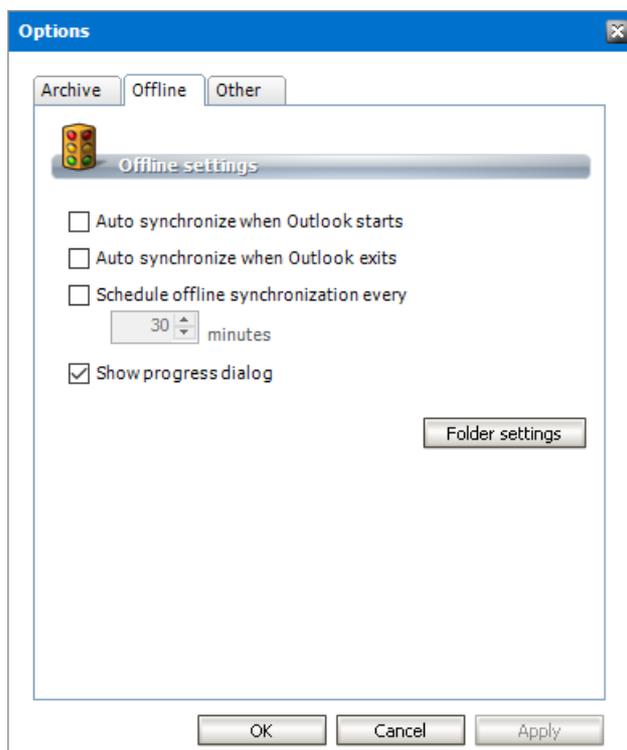


The properties are as described below:

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

Offline options

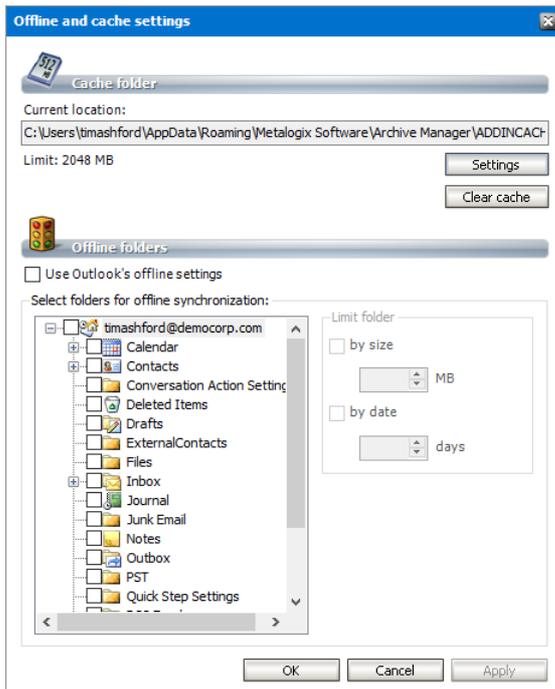
1. Click the **Archive Manager** addin.
2. Click **Options** to open the *Options* window.
3. Click the **Offline** tab to configure automatic offline synchronization.



The properties are as described below:

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

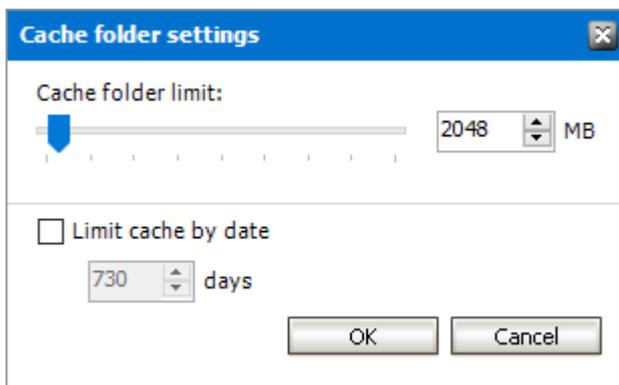
- b. **Auto synchronize when Outlook exits** - select this check box to synchronize the Outlook client with the Exchange sever when Outlook exits.
 - c. **Schedule offline synchronization every** - select this check box to schedule offline synchronization and specify the frequency in minutes. This is 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.



The properties and actions are as described below:

Cache folder

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



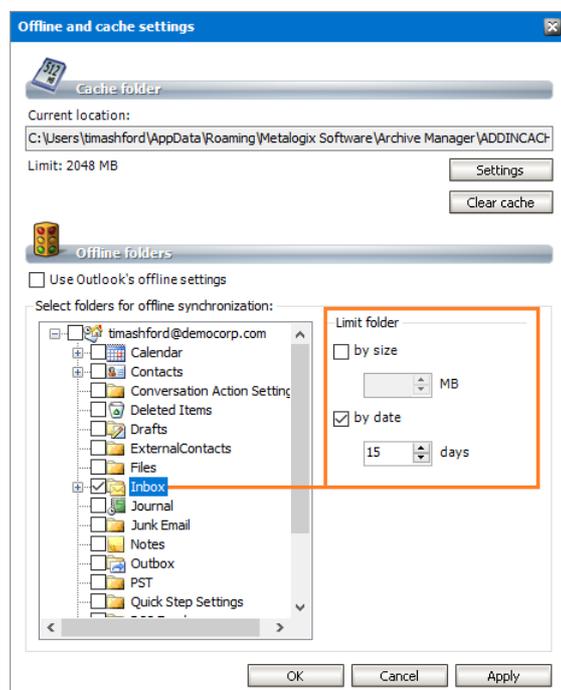
Set the cache limits as described below:

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

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

Offline folders

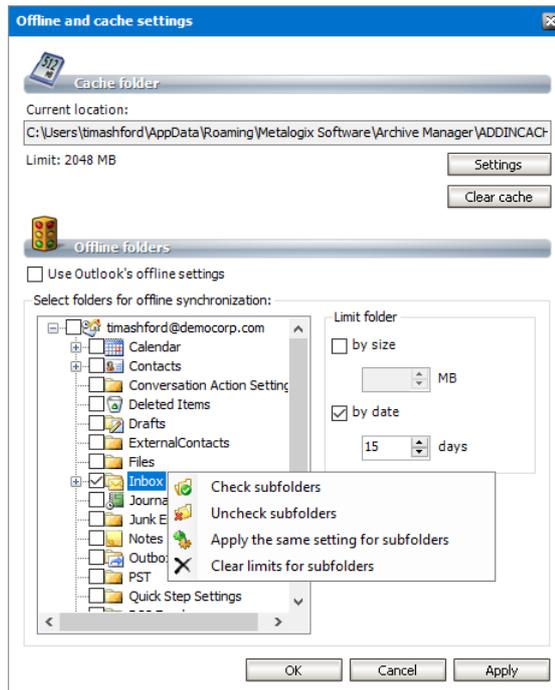
- a. **Use Outlook's offline settings** - select this check box to allow the add-in to synchronize folders that are defined in the Outlook settings. Clear this check box to customize cache limits for selected folders.
- b. Custom limits for selected folders. The custom cache size and date limits defined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



To set the cache size and limits:

- i. Select a folder.

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

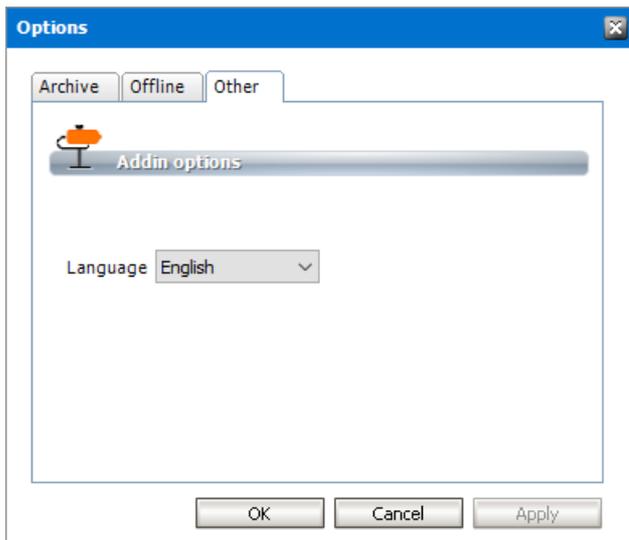


- iii. To manage subfolders right-click a folder to select the options in the context-menu. For example, if you set the date limit to 15 days for the *Inbox* folder and select the **Apply the same settings for subfolders** option from the context menu then the same date limit is set for every *Inbox*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

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

Other options

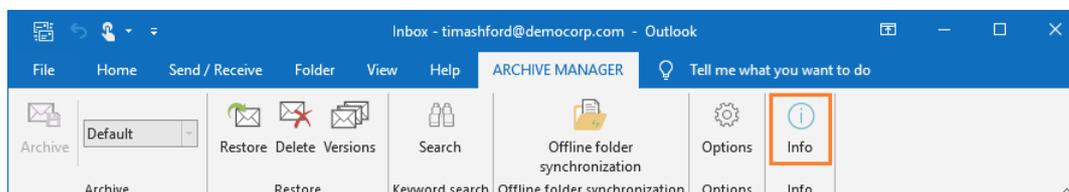
1. Click the **Archive Manager** addin.
2. Click **Options** to open the *Options* window.
3. Click the **Other** tab.
4. Choose the preferred language for the addin.



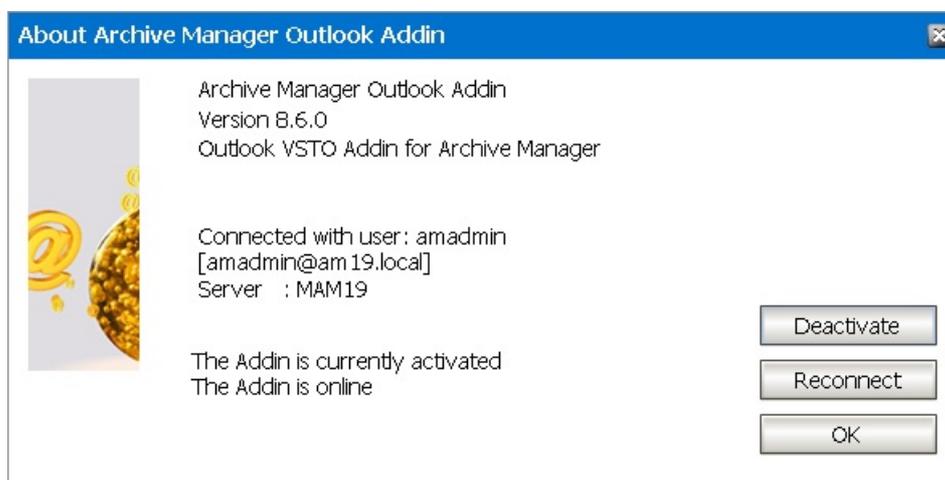
The Info feature presents information about the Archive Manager addin and allows you to manage the addin connectivity.

Steps to work with the Info feature

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



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



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

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