

Metalogix[®] Archive Manager for Exchange 8.6

ArchiveWeb Guide



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Legend



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



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

Metalogix[®] Archive Manager for Exchange

Updated June 2022

Version 8.6

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About ArchiveWeb

This application is used for viewing archived emails and files over the Internet. A user can access archived items through a web browser by navigating to the ArchiveWeb using the URL

`http://<ArchiveWebServerName>/archiveweb.`

With mobile device support your archive is at hand virtually anywhere. Mobile form factoring and simplified navigation contribute to the ease of use.

Functions:

- Browsing archived emails (archived by Archive Manager for Exchange) and files (archived by Archive Manager for Files)
- Keyword search (optional)
- Advanced search (optional) - allows searching for archived items using query-builder capabilities.
- Search template

Requirements

System requirements

- Windows Server 2012, Windows Server 2012 R2, Windows Server 2016 , Windows Server 2019 or Windows Server 2022
- .NET Framework 4.8 or higher (<https://dotnet.microsoft.com/en-us/download/dotnet-framework/thank-you/net48-web-installer>)

i **NOTE:** For the Windows servers listed above, verify that the **.NET Framework 4.5 Features / WCF Services / HTTP Activation** is selected under **Server Manager > Add Roles and Features Wizard**.

Supported browsers

- Mozilla Firefox current version
- Google Chrome current version
- Opera current version
- Microsoft Edge current version

IIS configuration

Verify that you have installed the fix for MVC applications as described in the link below to find the appropriate update according to your OS:

- <http://support.microsoft.com/kb/980368>

If you cannot browse the MVC application, try to register the framework for IIS by running the followings commands:

- %windir%\Microsoft.NET\Framework64\v4.0.30319\aspnet_regiis.exe -ir
- iisreset

If required, uncheck **Require SSL** in IIS's SSL Settings for ArchiveWeb.

Installation

Archive Manager ArchiveWeb must be installed on the same machine that hosts the Archive Manager for Exchange or Archive Manager for Files server. In a distributed deployment topology for Archive Manager for Exchange, choose the computer that hosts the Archive Manager for Exchange server with the **Archive server** role. Installing Archive Manager ArchiveWeb on another computer is not supported.

ArchiveWeb can be installed in one of two ways:

- automatically, by choosing the ArchiveWeb component from the unified product installer. This method installs ArchiveWeb on the same server where Archive Manager is installed.
- manually, using the *Archive Manager ArchiveWeb setup.exe* file. This method allows you to manually install ArchiveWeb on any web server in the domain where Archive Manager is installed.

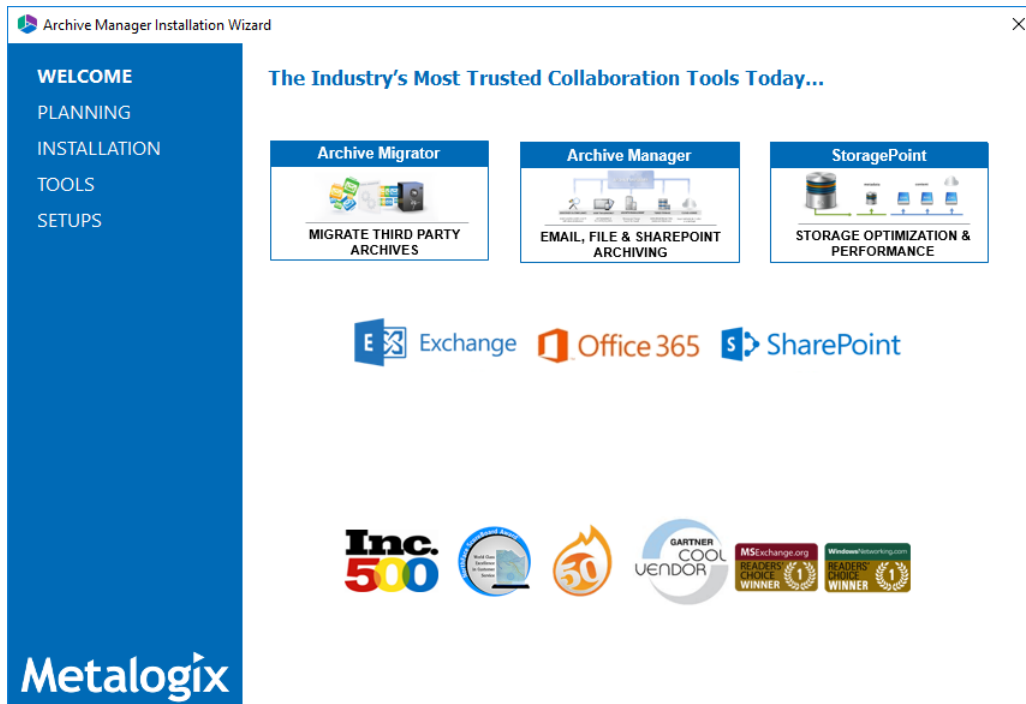
In this chapter:

- [Steps to install automatically with the product installer](#)
- [Steps to install manually with the ArchiveWeb installer](#)
- [Steps to verify the installation](#)

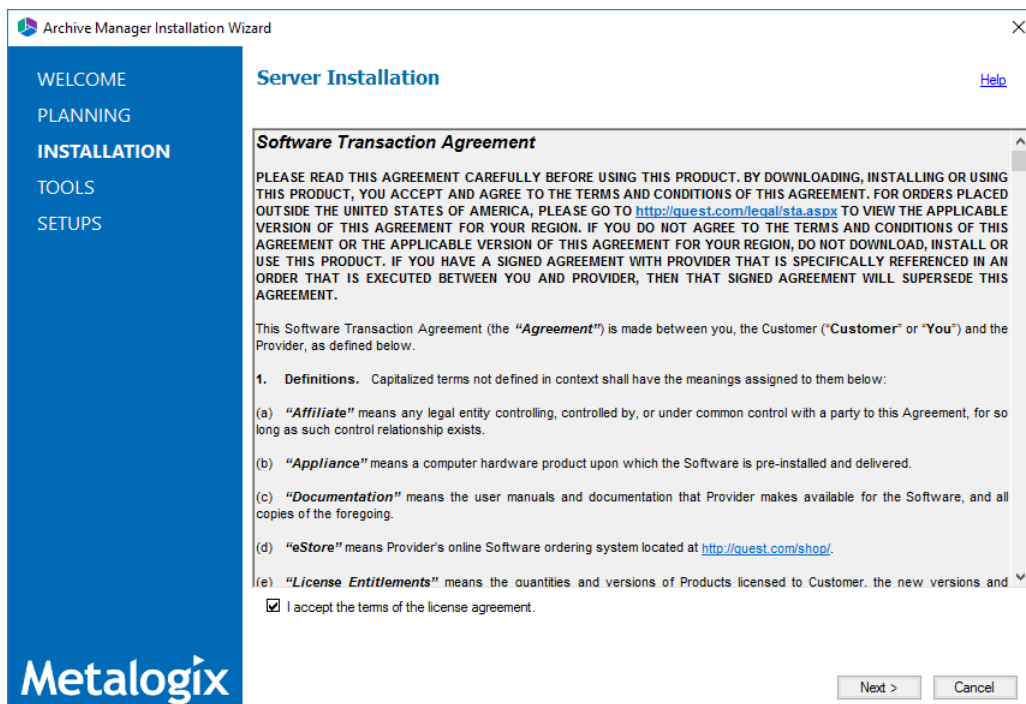
Steps to install automatically with the product installer

1. Login with the credentials of the **enterprise administrator** (eg. **democorp\domadmin**) to the Archive Manager for Exchange server (designated as the *Archive* server in a distributed deployment).
2. Download and unzip the installer if it is not already available.

3. If the installer does not start immediately, run the **MAMInstaller.exe** from your install media folder. The *Welcome* window opens.

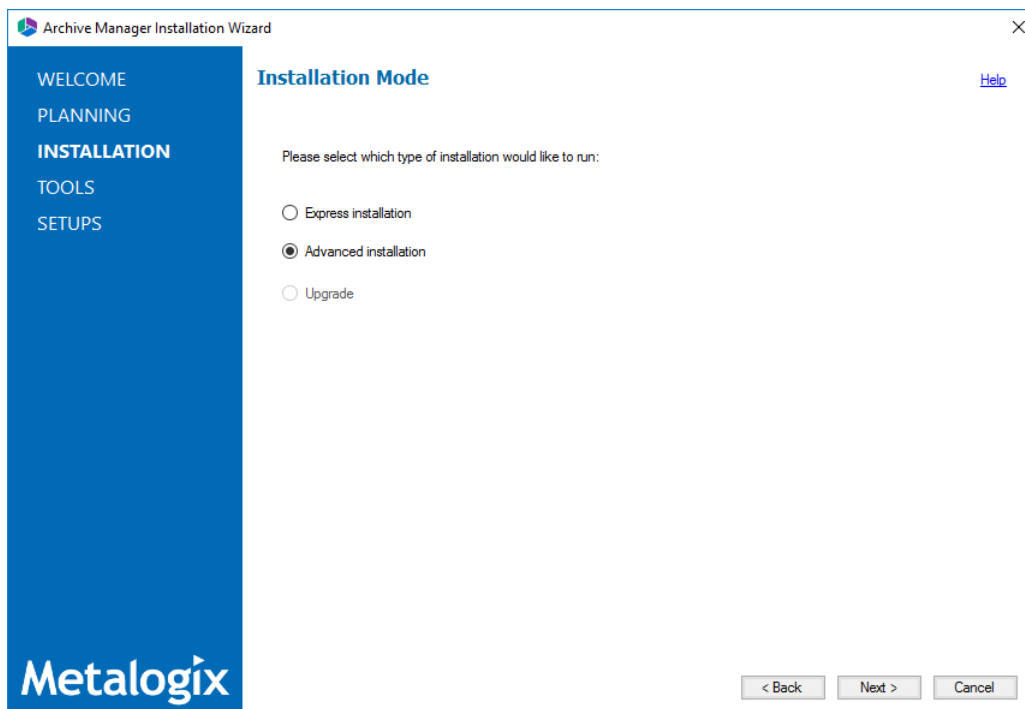


4. From the navigation panel on the left, click **INSTALLATION**. The *Server Installation* window opens.

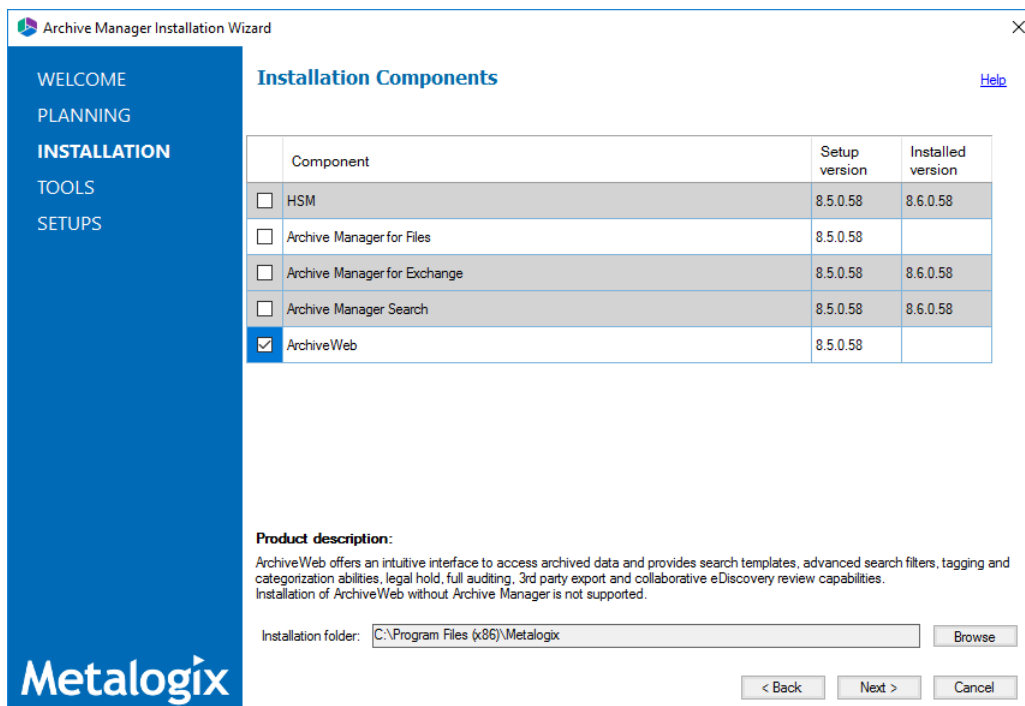


Read the **Software Transaction Agreement**. If you wish to proceed, select the **I accept the terms of the license agreement**.

5. Click **Next**. The *Installation Mode* window opens. Select the **Advanced installation** option

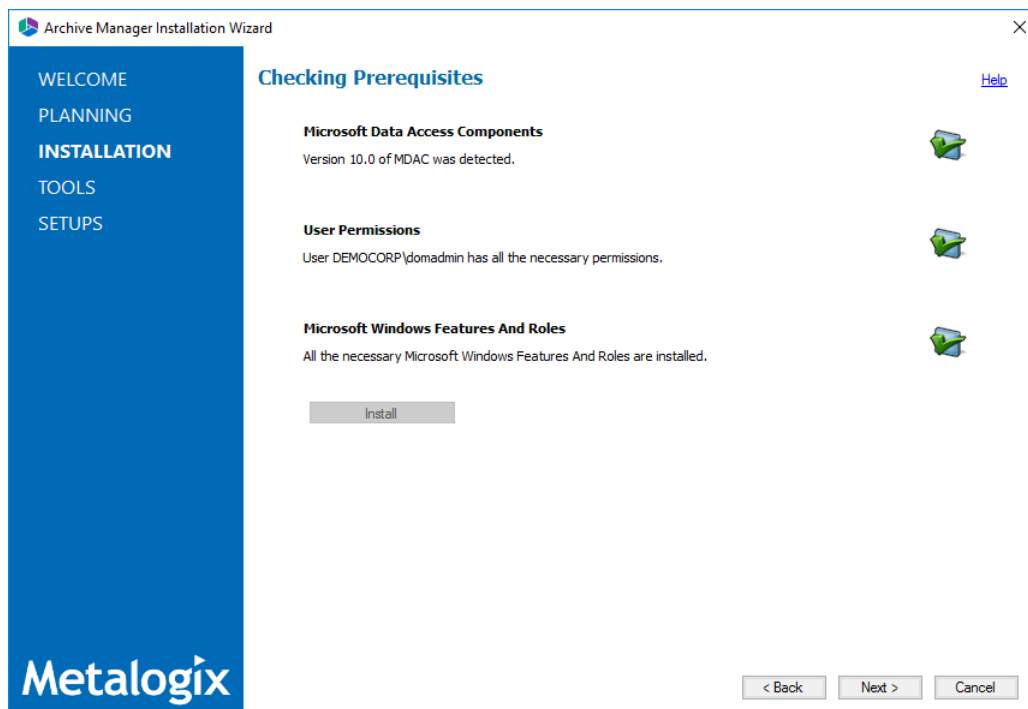


6. Click **Next**. The *Installation Components* window opens.

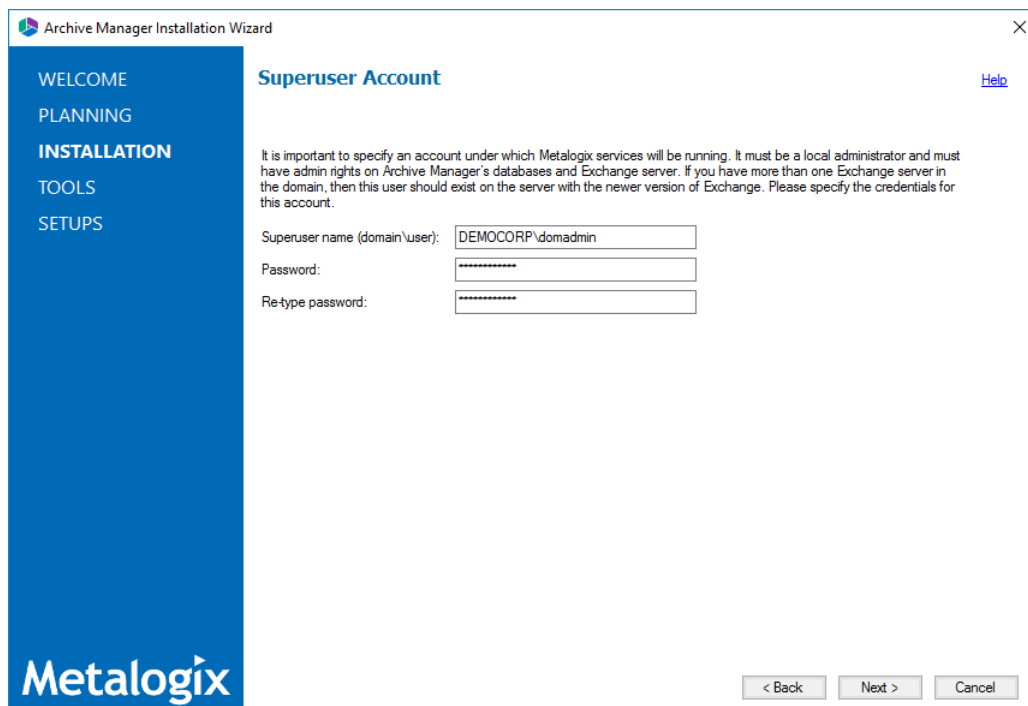


Verify that Archive Manager for Exchange is installed and then select **ArchiveWeb**. Click **Browse** to change the installation folder if necessary.

- Click **Next**. The *Checking Prerequisites* window opens.



- Click **Next**. The *Superuser Account* window opens.



Specify the **Superuser name** and **Password**. Enter the password again in the **Retype password** field.

- Click **Next**. The *ArchiveWeb Settings* window opens.

Archive Manager Installation Wizard

WELCOME
PLANNING
INSTALLATION
TOOLS
SETUPS

ArchiveWeb Settings [Help](#)

MultiTenant Web Service URL:

☒ Archive Manager for Exchange
Exchange Web Service URL:

☐ Archive Manager for Files
Files Web Service URL:

☒ Archive Manager Search
Search URL:

☒ Archive Manager Auditing
Auditing Server Name:
Auditing Server Port:

< Back Next > Cancel

Metalogix

Specify the properties as described below:

MultiTenant Web Service URL - URL for MultiTenantWS web service

Archive Manager for Exchange - select this option to install web services for Archive Manager for Exchange.

Exchange Web Service URL - URL for ExchangePAMWS web service if Archive Manager for Exchange is installed.

Archive Manager for Files - select this option to install web services for Archive Manager for Files.

Files Web Service URL - URL for FilePAMWebService web service if Archive Manager for Files is installed.

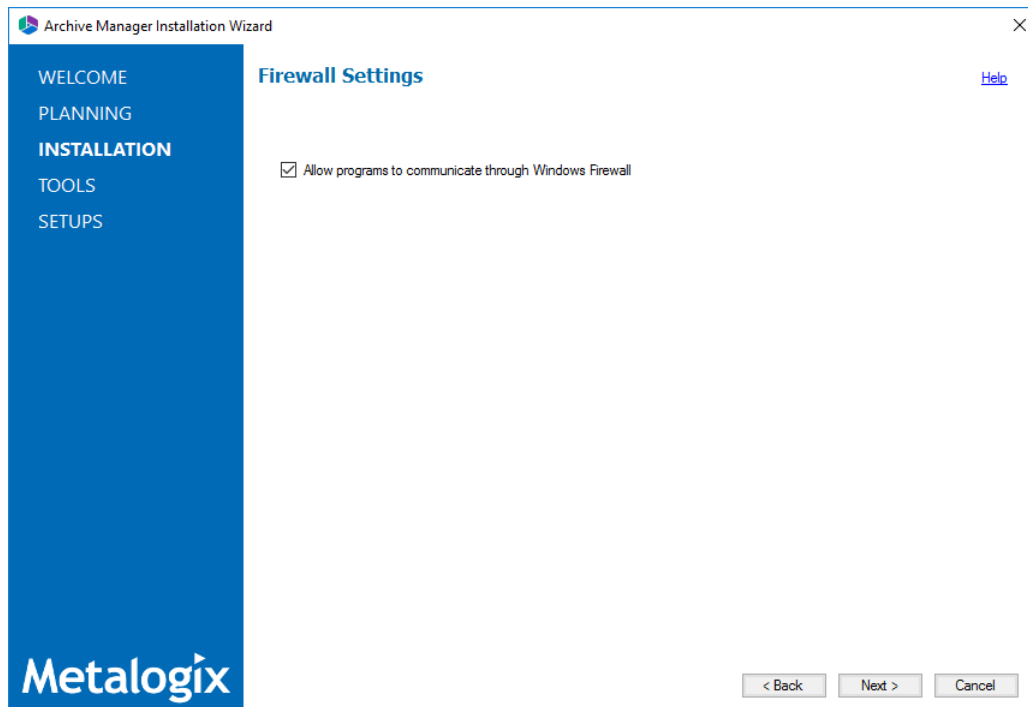
Archive Manager Search - select this option to install web services for Archive Manager Search.

Search URL - URL for PamSearch web service if Archive Manager Search is installed.

Archive Manager Auditing - select this option to specify the server details for Archive Manager Auditing.

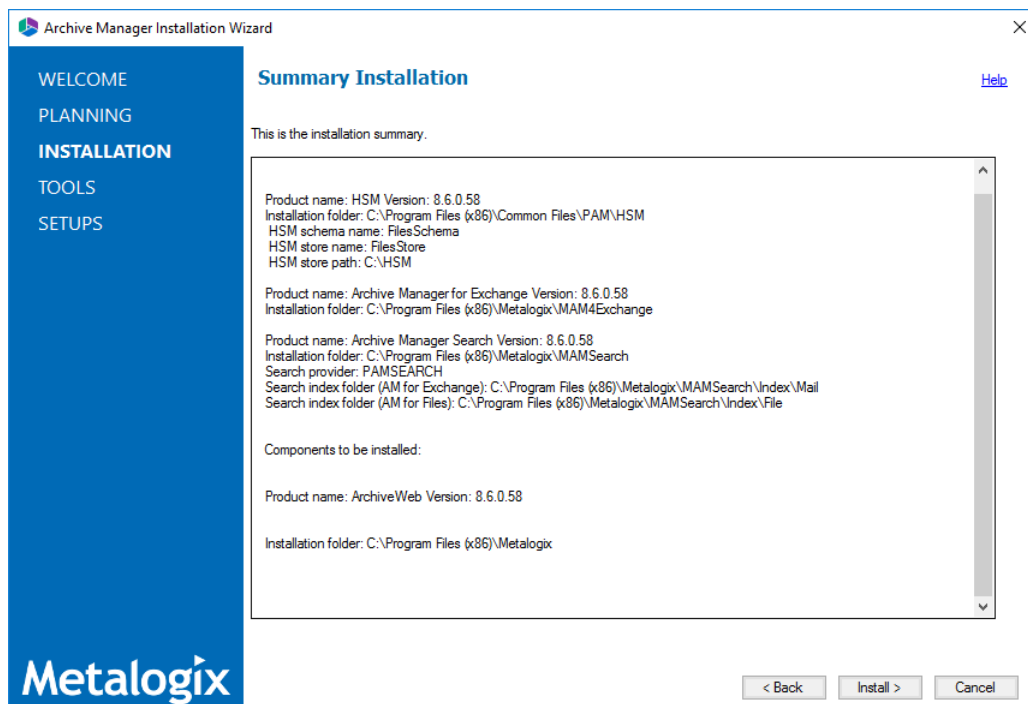
Auditing server name & port - specifications for the machine where auditing component is installed

10. Click **Next**. The *Firewall Settings* window opens.

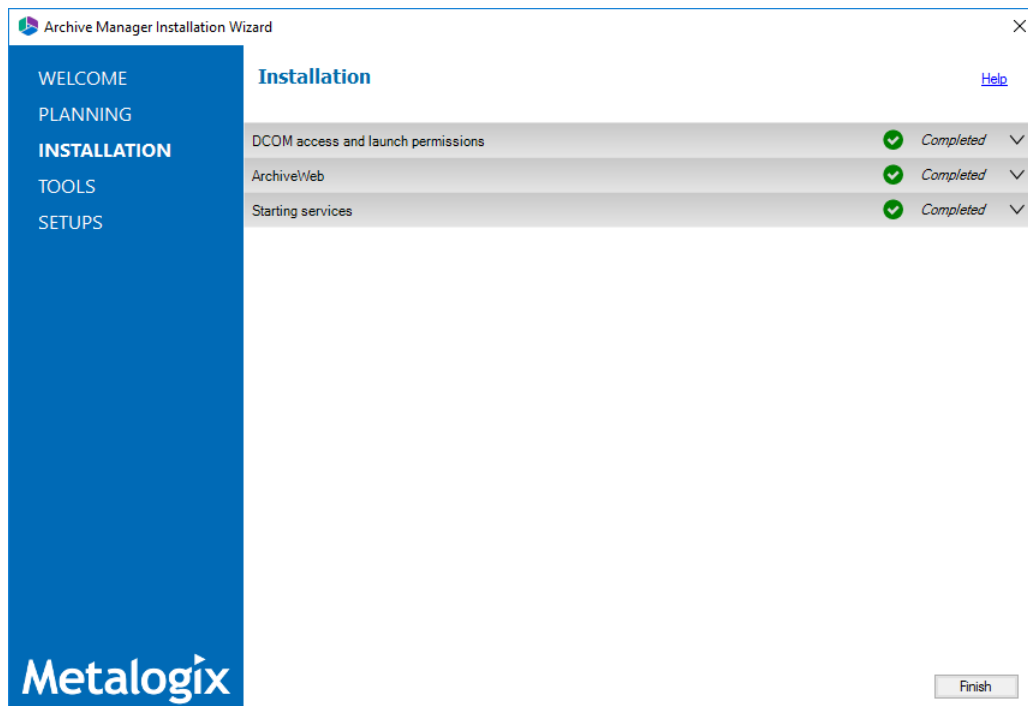


Select **Allow programs to communicate through Windows Firewall**. Metalogix Archive Manager for Exchange features will be then able to communicate through the firewall.

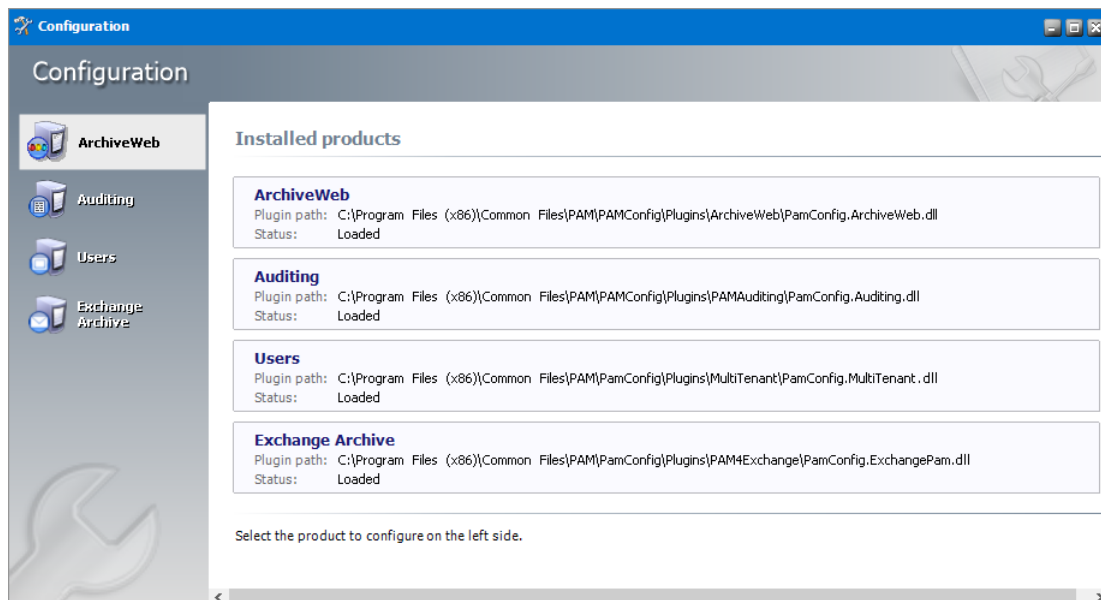
11. Click **Next**. The *Summary Installation* window opens. The installation summary displays settings you have specified in previous steps.



12. Click **Install** to start the installation. If a feature installation fails or completes with a warning, expand the row to view and address the problem.



13. Click **Finish** to complete the installation step.
14. To quickly verify the install, open **Start > Metalogix > Archive Manager Configuration**. The *Configuration* wizard opens and the **ArchiveWeb** tab is available..

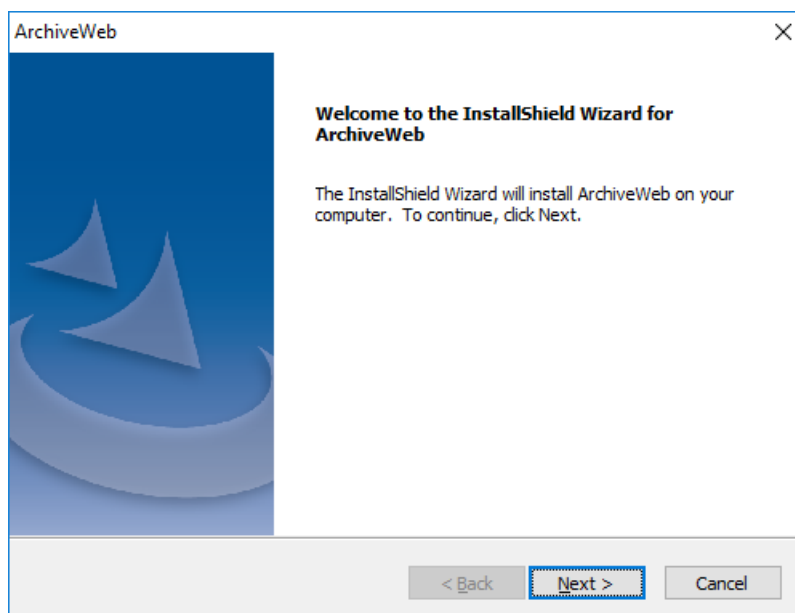


Steps to install manually with the ArchiveWeb installer

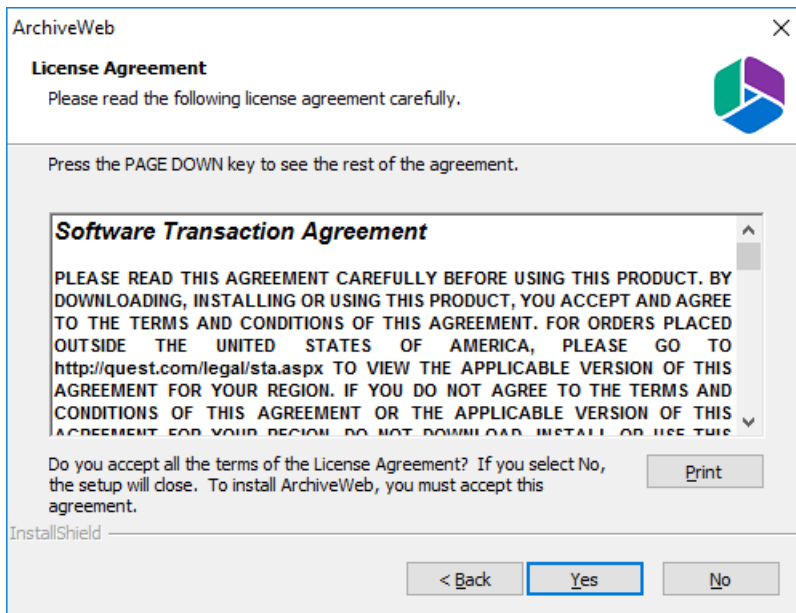
1. Login with the credentials of the **enterprise administrator** (eg. **democorp\domadmin**) to the Archive Manager for Exchange server (designated as the *Archive* server in a distributed deployment).
2. Download and unzip the installation package if it is not already available.
3. Open PowerShell in Administrator mode and install the server prerequisites by running the following command:

```
Install-WindowsFeature -Name NET-WCF-HTTP-Activation45, Web-Server, Web-Static-Content, Web-Http-Redirect, Web-Stat-Compression, Web-Dyn-Compression, Web-Windows-Auth, Web-Basic-Auth
```

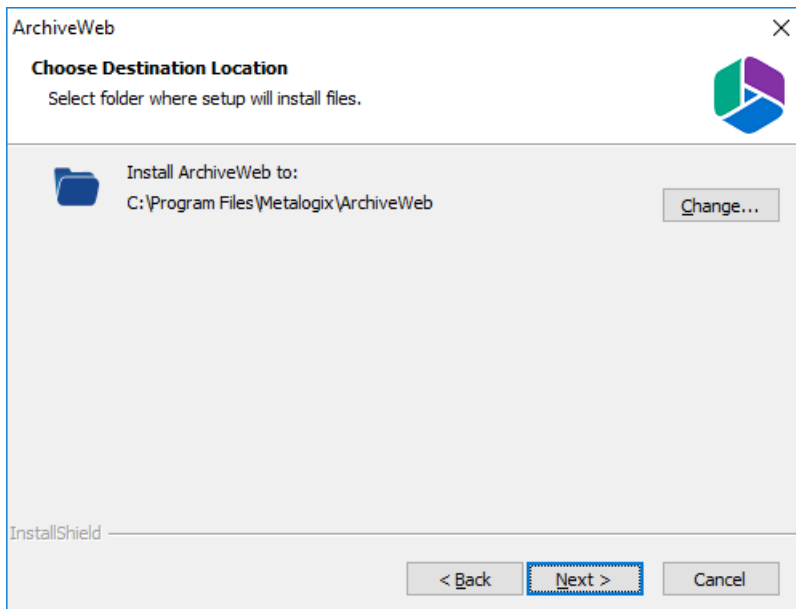
4. Run the setup file `<installer package folder>\ArchiveWeb\Archive Manager ArchiveWeb setup.exe` to start the ArchiveWeb installer wizard.



5. Click **Next**. Then *License Agreement* window opens.



6. Click **Next**. The *Choose Destination Location* window opens.



7. Click **Change** to choose another destination or click **Next** to continue. The *ArchiveWeb installation settings* window opens.

ArchiveWeb

ArchiveWeb installation settings

Which Archive Manager Edition is installed in your environment?

☒ Archive Manager for Exchange

☐ Archive Manager for Files

MultiTenant Web Service URL:

Exchange Web Service URL:

Files Web Service URL:

Note: If you select any option, the respective fields must be filled in before clicking Next.

InstallShield

< Back Next > Cancel

The properties are as described below:

- a. **Archive Manager for Exchange** - select this option to install features specific to Archive Manager for Exchange.
 - b. **Archive Manager for Files** - select this option to install features specific to Archive Manager for Files.
 - c. **MultiTenant Web Service URL** - location of the tenant web service on the web server. The default location is automatically specified.
 - d. **Exchange Web Service URL** - location of the ASP.NET Web service for the Archive Manager for Exchange features in ArchiveWeb. Activated only if **Archive Manager for Exchange** is selected.
8. Click **Next**. The *Component Integration* window opens.

ArchiveWeb

ArchiveWeb installation settings

Which Archive Manager component is installed in your environment?

☒ Archive Manager Auditing

Auditing Server Name:

Auditing Server Port:

☒ Archive Manager Search

Search URL:

Note: port number should be between 1 <-> 65535

InstallShield

< Back Next > Cancel

This window allows you to specify the details of the components installed in your environment that will be integrated with ArchiveWeb.

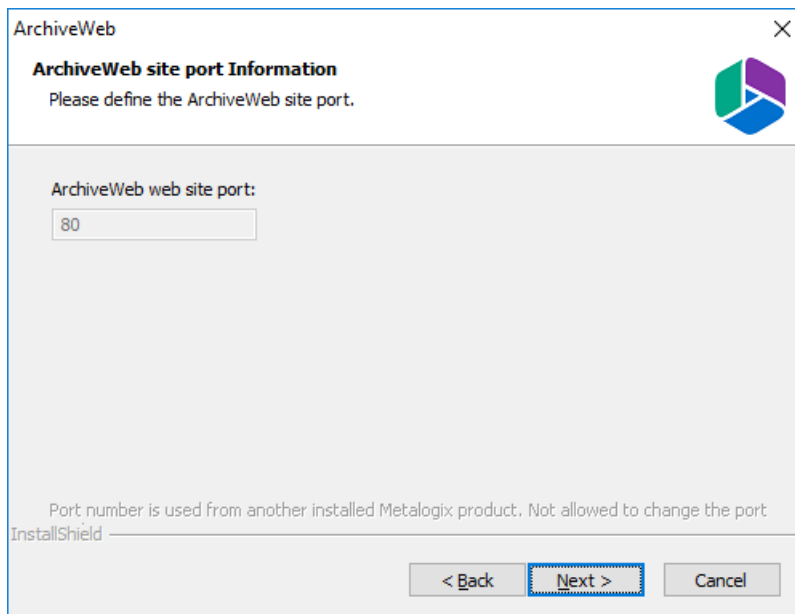
- a. **Archive Manager Auditing** - select this option if Archive Manager Auditing is installed in your environment.
- b. **Auditing Server Name** - name of the server where Archive Manager Auditing is installed.
- c. **Auditing Server Port** - port number of the Archive Manager Auditing feature. The default port number is 7783.

i | **NOTE:** To find this information open the *Archive Manager Configuration* tool on your auditing server. Then open the *Connection* tab in the *Auditing* section.

- d. **Archive Manager Search** - select this option if Archive Manager Search is installed in your environment.
- e. **Search URL** - the search URL used by the search feature in the format tcp://<search-server>:<search-port>/PamSearch.

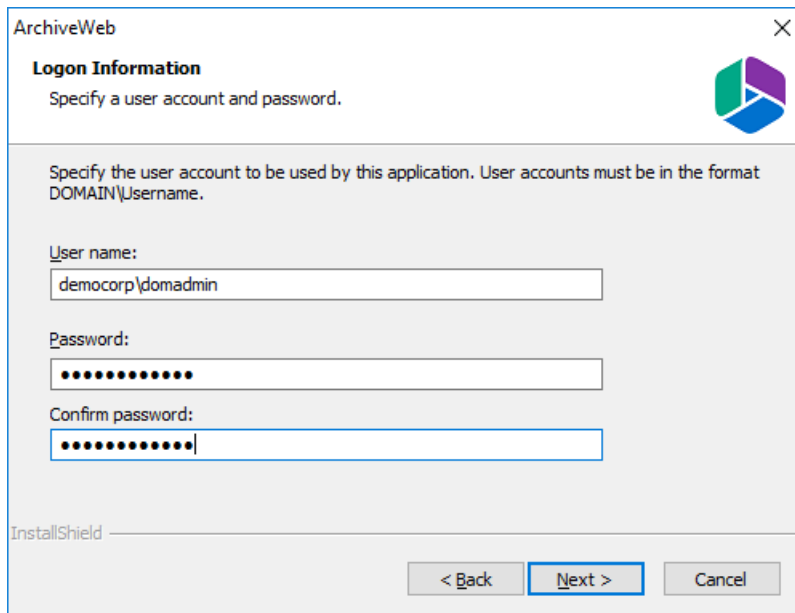
i | **NOTE:** To find this information open the *Archive Manager Configuration* tool on your auditing server. Then open the *Connection* tab in the *Auditing* section.

9. Click **Next**. The *ArchiveWeb site port* window opens.



The screenshot shows a window titled "ArchiveWeb" with a close button (X) in the top right corner. Below the title bar, the text "ArchiveWeb site port Information" is displayed, followed by "Please define the ArchiveWeb site port." and a small logo. The main area contains a label "ArchiveWeb web site port:" and a text input field with the value "80". At the bottom, a message states: "Port number is used from another installed Metalogix product. Not allowed to change the port." Below this message is the "InstallShield" logo. At the bottom right, there are three buttons: "< Back", "Next >" (which is highlighted with a blue border), and "Cancel".

10. Click **Next**. The *Logon Information* window opens.



ArchiveWeb

Logon Information
Specify a user account and password.

Specify the user account to be used by this application. User accounts must be in the format DOMAIN\Username.

User name:
democorp\domadmin

Password:
●●●●●●●●

Confirm password:
●●●●●●●●

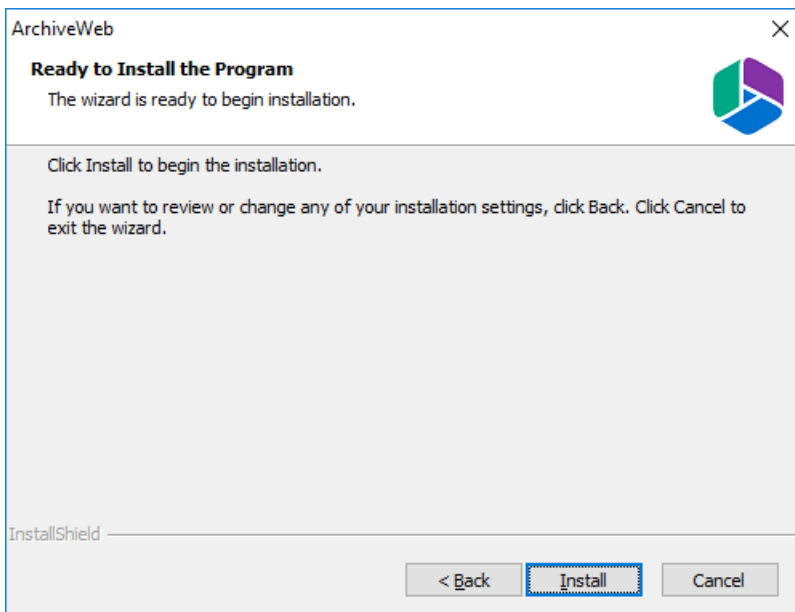
InstallShield

< Back Next > Cancel

Enter the account credentials as described below:

- User name** - user name of the enterprise administrator in the format `domain\username`.
- Password** - password for the enterprise administrator.
- Confirm password** - re-enter the password for the enterprise administrator.

11. Click **Next**. The *Ready to Install the Program* window opens.



ArchiveWeb

Ready to Install the Program
The wizard is ready to begin installation.

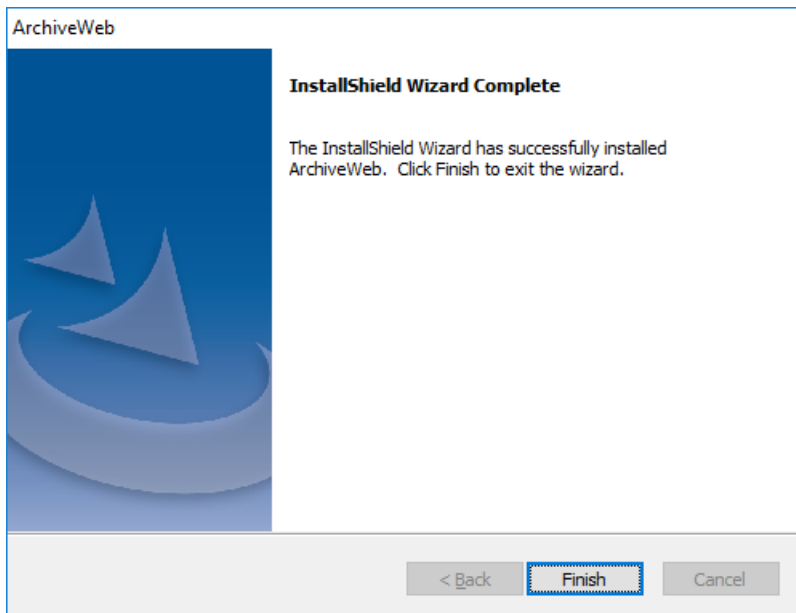
Click Install to begin the installation.

If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.

InstallShield

< Back Install Cancel

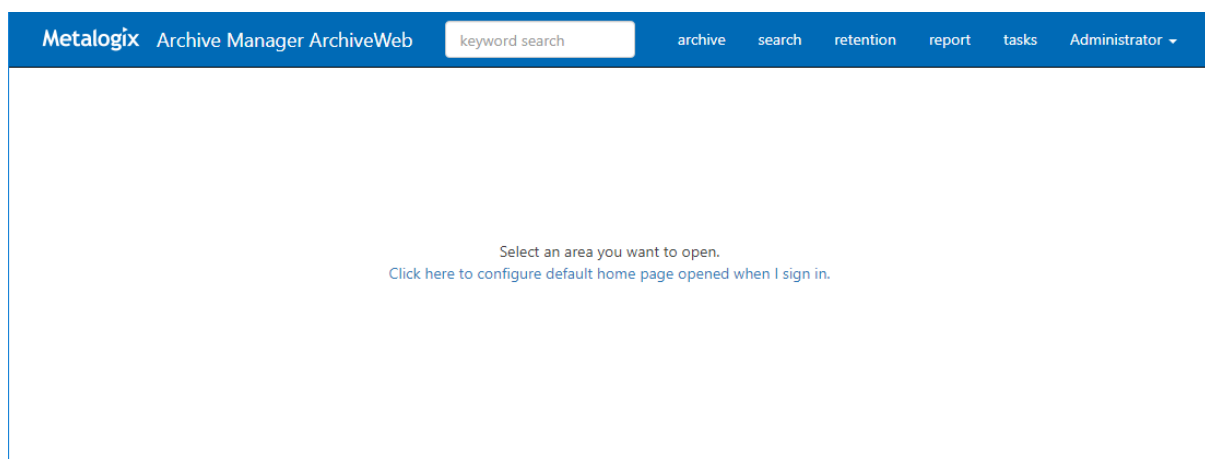
12. Click **Back** to review or revise the settings, or click **Install** to start the installation.



13. Click **Finish** to complete the setup and close the installer wizard. The *ArchiveWeb* section in the *Archive Manager Configuration* tool opens. For more information see [Configuration](#).

Steps to verify the installation

1. Stop and restart the *Archive Manager for Exchange* services. If *Archive Manager for Files* is installed, then you must restart the services for this product as well.
2. Open a supported browser.
3. Enter the URL `<archive-manager-server-fqdn>/ArchiveWeb/Login`.
4. Verify that you can login and the ArchiveWeb page as shown below is loaded successfully.



Configuration

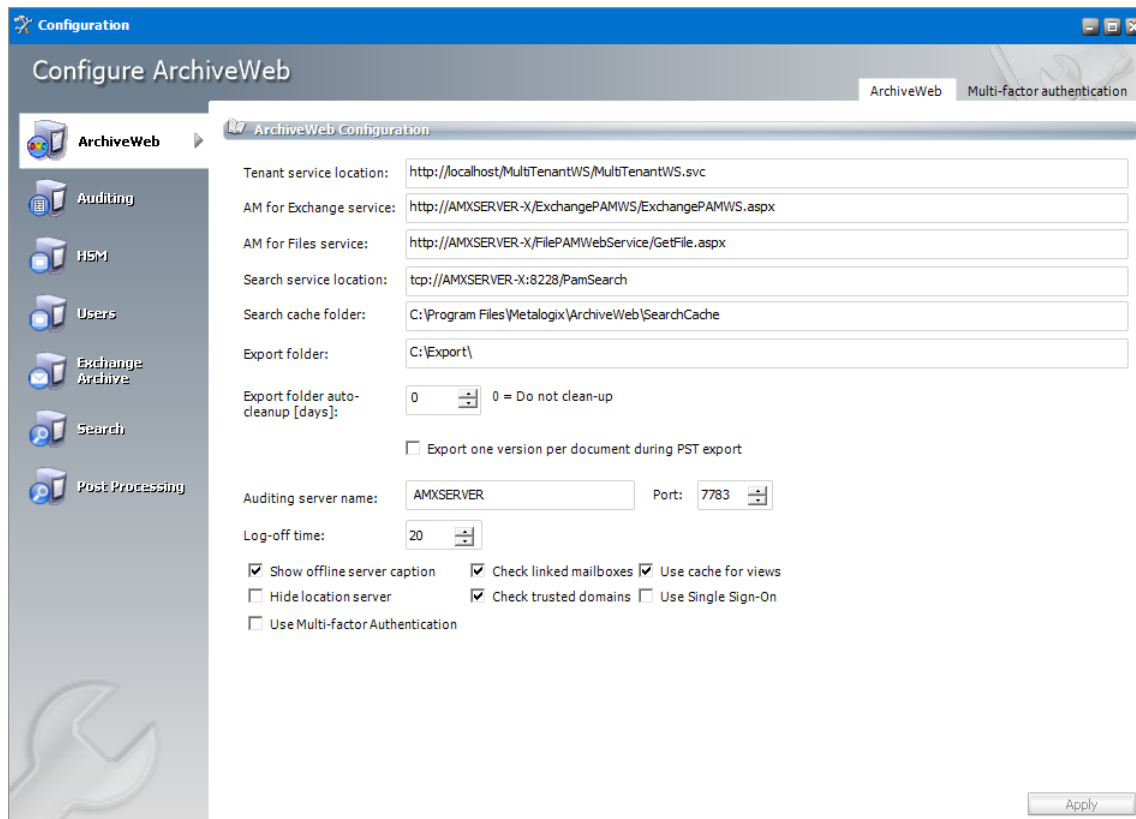
In this chapter:

- [ArchiveWeb Setup](#)
- [Multi-factor Authentication](#)
- [Search Scopes](#)
- [General Data Protection Regulation](#)
- [Post-processing](#)

ArchiveWeb Setup

ArchiveWeb is configured and ready for use right after installation. No user action is required. However, should the need arise, default configuration can be adjusted in Configuration tool.

The Configuration tool is available on the ArchiveWeb server under *<installdir>/Program Files (x86)/Common Files/PAM/PAMConfig/PamConfig.exe*. Its **ArchiveWeb** tab list available configuration options. (For more information on the **Multi-factor authentication** tab see the section *Multi-factor authentication (MFA)*.)



Specify the properties as described below:

Tenant service location - URL for MultiTenantWS web service

AM for Exchange service - URL for ExchangePAMWS web service if Archive Manager for Exchange is installed.

AM for Files service - URL for FilePAMWebService web service if Archive Manager for Files is installed.

Search service location - URL for PamSearch web service

Search cache folder - user's temporary storage folder to store e.g. messages downloaded from Exchange server for preview functionality

Export folder - folder where exported files (PST export, ZIP export) are stored (download link points to this folder)

Export folder auto-cleanup [days] - files older than the specified number of days will be deleted from the **Export folder**.

Export one version per document during PST export - indicates whether to export one version per document during PST export

Auditing server name & port - machine where auditing component is installed

Log-off time - time in minutes to log off when inactive

Show offline server caption - select this option to show [OFFLINE] suffix for decommissioned servers in servers' list if Archive Manager for Files is installed.

Hide location server - unchecked by default; indicating whether to hide Location Server Name from user's mailbox displayed in Mailboxes tree-view; if not checked, Location Server Name will be displayed as a suffix to user's email, e.g. administrator@[VMMVC5]

Check linked mailboxes - select this option to check whether currently logging user has a linked mailbox associated. When unchecked, the entire login process can be accelerated because no additional Active Directory search is performed

Check trusted domains - select this option to check trusted domains and read information from trusted relationships. When unchecked the entire login process can be accelerated because no additional reads (from trusted domains) are performed

Use cache for views - select this option to cache all grid source data after first load so that operations on grid that do not change the data will be performed quicker.

Use Single Sign-On - select this option to activate the Single Sign-On feature for ArchiveWeb login.

Multi-factor Authentication

ArchiveWeb supports multi-factor authentication (MFA) for O365 user accounts. Setting up MFA is a two-step process:

1. [Create a new application in the Azure portal.](#)
2. [Configure ArchiveWeb with the Archive Manager configuration tool.](#)

Create a new application in the Azure portal

ArchiveWeb requires a specific Azure site to be created that is used to return an authentication token back to the ArchiveWeb after a user is authenticated via Microsoft portal.

1. Login to your Azure Portal using your administrator credentials (<https://portal.azure.com>). If your account gives you access to more than one tenant, select your account in the top right corner, and set your portal session to the Azure AD tenant that you want.
2. In the left-hand navigation pane, select the **Azure Active Directory** service, and then select **App registrations > New registration**. The *App registrations* page appears.
3. Click **New registration**. The *Register an Application* page appears.

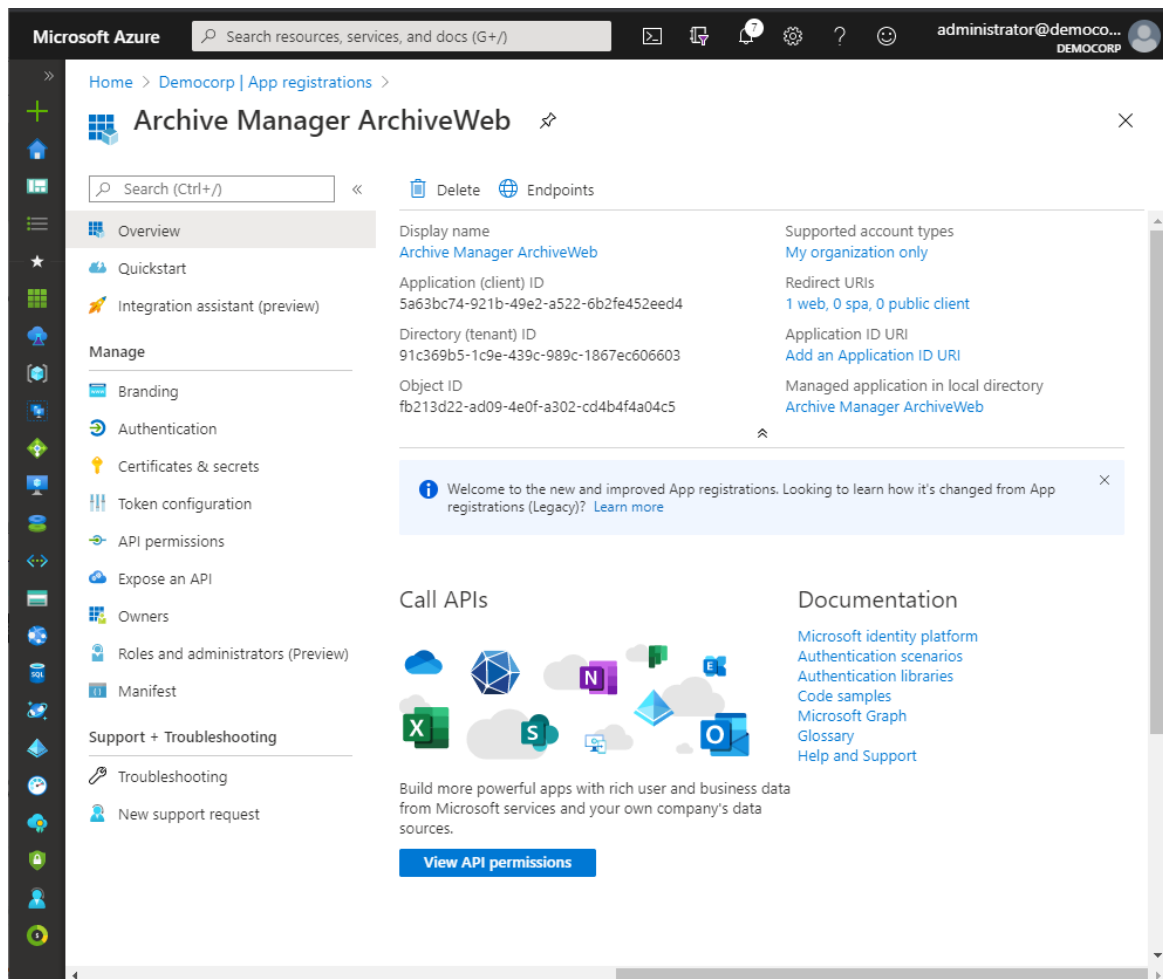
The screenshot shows the 'Register an application' page in the Microsoft Azure portal. The browser address bar shows the URL: `portal.azure.com/#blade/Microsoft_AAD_IAM/ActiveDirectoryMenuBlade/RegisteredApps`. The page title is 'Register an application'. The 'Name' field is labeled '* Name' and contains the text 'Archive Manager ArchiveWeb'. Below it, a description states: 'The user-facing display name for this application (this can be changed later)'. The 'Supported account types' section is titled 'Supported account types' and 'Who can use this application or access this API?'. It has three radio button options: 'Accounts in this organizational directory only (Quest only - Single tenant)' (selected), 'Accounts in any organizational directory (Any Azure AD directory - Multitenant)', and 'Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)'. There is a link 'Help me choose...'. The 'Redirect URI (optional)' section has a description: 'We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.' It has a dropdown menu set to 'Web' and a text field containing 'https://amxserver.democorp.com/ArchiveWeb/Login'. At the bottom, there is a link 'By proceeding, you agree to the Microsoft Platform Policies' and a blue 'Register' button.

4. Provide the information on this page as described below:
- Name** - Enter a meaningful application name that will be displayed to users. For example, **Archive Manager ArchiveWeb**.
 - Supported account types** - Select the account type you would like your application to support that best meets your company policy.
 - Redirect URI** - from the *application type* dropdown select **Web**. In the URI field enter the ArchiveWeb URI where the user will be redirected after multi-factor authentication (eg. `https://<fullservername>/ArchiveWeb/Login`)

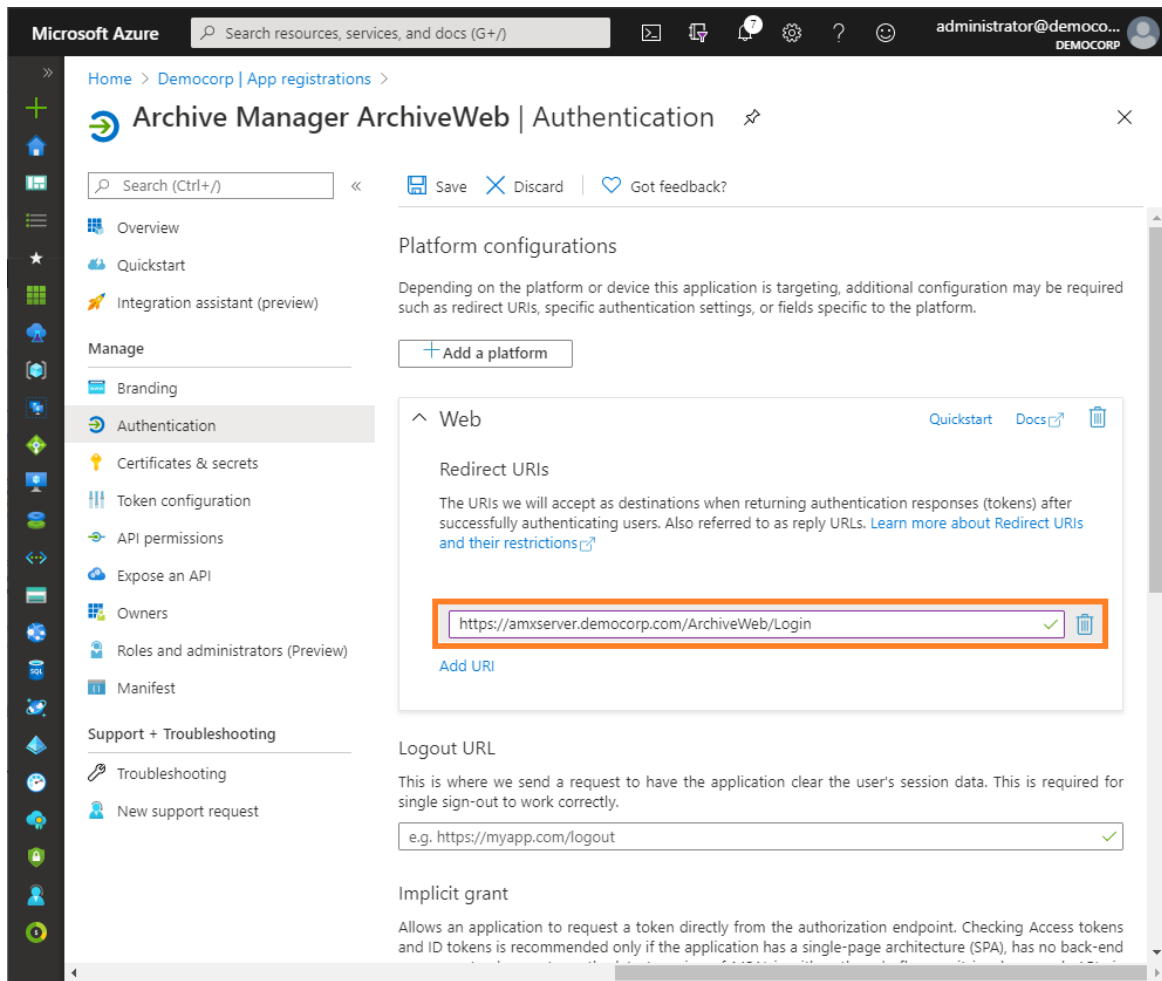
i NOTE: The HTTPS protocol is required for MFA to work with O365. To ensure the HTTPS can be used, follow the steps below;

1. On the ArchiveWeb server, open the IIS Management Console.
2. Expand the server node and then expand the Sites node.
3. Select Default Web Site and right-click to open the context menu. Then select Edit Bindings. The Site Bindings window opens.

4. Click **Add**. The Add Site Bindings window opens.
 5. Select **https** from the Type dropdown and fill in the other details as required.
 6. Click **OK** to save the https site binding.
 7. Restart the IIS service from the server node and then close the IIS Management console.
5. Click **Register**. Azure AD assigns a unique application (client) ID to your app, and the application's *Overview* page opens.



6. From the navigation menu, click **Branding**. Enter the URLs that your organization may use for the different branding artifacts.
7. From the navigation menu, click **Authentication** and verify that the Redirect URI parameters are as expected.



8. From the navigation menu, click **Certificates & Secrets**.
9. In the *Client secrets* section click **New client secret**. the Add a client secret page opens.

Add a client secret

Description

ArchiveWeb Client Secret

Expires

☐ In 1 year
☐ In 2 years
☒ Never

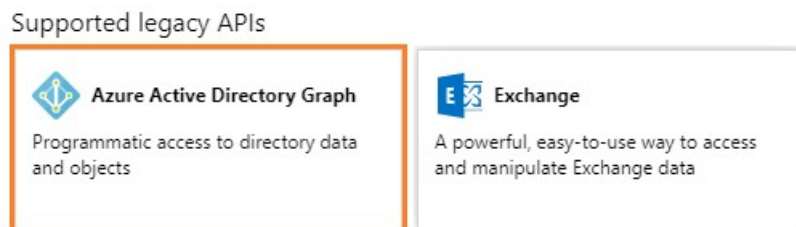
Add

Cancel

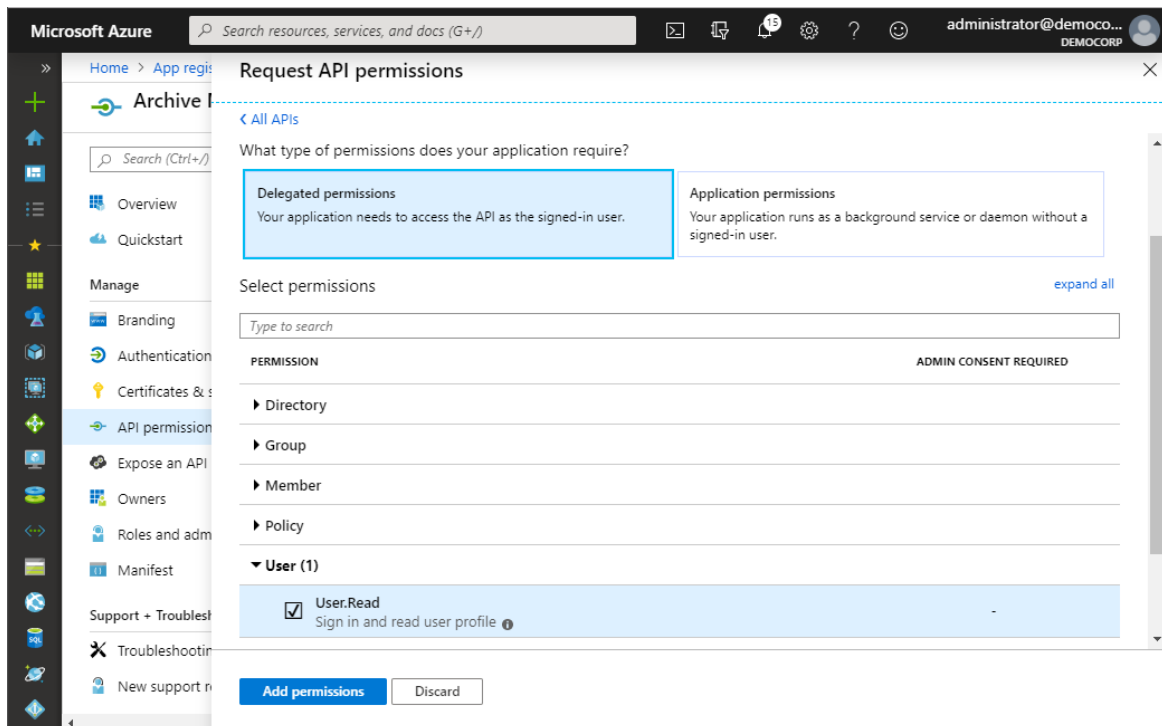
10. Enter values as described below:
 - a. **Description** - enter a meaningful description. For example, ArchiveWeb Client Secret.
 - b. **Expires** - set the expiry term that best meets your company policy.
11. Click **Add**. the client secret is displayed on the Certificates & Secrets page.

IMPORTANT: Copy and save the client secret in a safe place. It will not be available when you navigate away from this Azure blade.

12. From the navigation menu, click **API Permissions**, and then click **Add a permission**. The *Request API permissions* page appears.
13. From the **Microsoft APIs** category, scroll down to the *Supported legacy APIs* section and select **Azure Active Directory Graph**.



14. From the *Request API permissions* page for Azure Active Directory Graph that appears, select **Delegated permissions**.



15. Click **Add permission**.
16. From the navigation menu, click **Expose an API**.
17. In the *Scopes defined* section, click **Add a scope**. The *Add a scope* page opens.

Add a scope [X]

You'll need to set an Application ID URI before you can add a permission. We've chosen one, but you can change it.

* Application ID URI ⓘ

api://85868bd2-51e9-45d9-b6ca-f482ba3889c1

[Save and continue] [Cancel]

- Microsoft Azure generates an Application ID URI automatically. It is a globally unique URI used to identify this web API. It is the prefix for scopes and in access tokens, and is also referred to as an identifier URI. You can keep this value or specify a unique value in the same format.

i | **IMPORTANT:** Copy and save this value in a safe place.

- Click **Save and continue**. The *Add a scope* page displays more options.

Add a scope [X]

* Scope name ⓘ

Messages.Read ✓

api://85868bd2-51e9-45d9-b6ca-f482ba3889c1/Messages.Read

Who can consent? ⓘ

[Admins and users] [Admins only]

* Admin consent display name ⓘ

Read access to user messages ✓

* Admin consent description ⓘ

Allow application to read user messages ✓

User consent display name ⓘ

Grant read access to my messages ✓

User consent description ⓘ

Allow application to read my messages

State ⓘ

[Enabled] [Disabled]

[Add scope] [Cancel]

- Click **Add scope** to complete the registration.

Configure ArchiveWeb with the Archive Manager configuration tool

- Open the Archive Manager Configuration Tool from *C:\Program Files (x86)\Common Files\PAM\PAMConfig\PamConfig.exe*
- From the sidebar, click **ArchiveWeb**.

- Click the **ArchiveWeb** tab. The *ArchiveWeb Configuration* page appears.

The screenshot shows the 'Configure ArchiveWeb' window with the 'ArchiveWeb Configuration' tab selected. The left sidebar contains icons for 'ArchiveWeb', 'Auditing', 'Users', and 'Exchange Archive'. The main area contains the following fields and options:

- Tenant service location:
- AM for Exchange service:
- AM for Files service:
- Search service location:
- Search cache folder:
- Export folder:
- Export folder auto-cleanup [days]: (0 = Do not clean-up)
- ☐ Export one version per document during PST export
- Auditing server name: Port:
- Log-off time:
- ☒ Show offline server caption ☒ Check linked mailboxes ☒ Use cache for views
- ☐ Hide location server ☒ Check trusted domains ☐ Use Single Sign-On
- ☒ Use Multi-factor Authentication (highlighted with a red box)

An 'Apply' button is located at the bottom right.

- Select **Use Multi-factor Authentication** to activate the fields in the *Multi-factor authentication Configuration* window.
- Click the **Multi-factor authentication** tab. The *Multi-factor authentication Configuration* window appears.

The screenshot shows the 'Configure ArchiveWeb' window with the 'Multi-factor authentication Configuration' tab selected. The left sidebar is the same as the previous screenshot. The main area contains the following fields:

- Organization name in Office365 (org.onmicrosoft.com):
- Client ID (see Azure application):
- Client Secret (see Azure application):

An 'Apply' button is located at the bottom right.

- Enter the field values as described below:

- a. **Organization Name in Office365** - enter the name of your O365 organization URL. For example, *democorp.onmicrosoft.com*
- b. **Client ID** - enter the Client Id that you saved from the Azure application registration steps.
- c. **Client Secret** - enter the Client Secret that you saved from the Azure application registration steps.

7. Click **Apply**.



IMPORTANT:

When at least one user in an organization has MFA set, the Organization, Client ID and Client Secret should be set in Multi-factor authentication tab as a readiness exercise.

If only a few users in your organization have MFA activated, the **Use Multi-factor Authentication** checkbox should remain unchecked. The settings in the *Multi-factor authentication* tab will persist when the **Use Multi-factor Authentication** checkbox is unchecked. The users who have MFA activated will be prompted to enter the credentials (user email and password) and then they will be redirected to the Microsoft site where the user has to authenticate again. After a successful authentication by Microsoft, the user will be redirected back to ArchiveWeb.

When all users accounts in an organization have MFA activated, the **Use Multi-factor Authentication** checkbox can be selected. This will allow ArchiveWeb to use multi-factor authentication for all users that log in to ArchiveWeb. Users will be prompted to enter only the login email address and they will be redirected to the Microsoft login form to finish the login process.

Search Scopes

The Archive Manager Search installer installs the Search and Post Processing services which allows a user to search and run specific tasks on each archived message. Search scopes must be configured to allow searching for archived emails with ArchiveWeb. A search scope is a specified Archive server.



NOTE: If you install Archive Manager for Exchange with the Express or Advanced installation option, the Search Scope is automatically configured for you. If you install Archive Manager for Exchange manually, you must configure the Search Scope manually.

Steps to configure Search Scopes

1. From the feature panel on the left in the *Configuration* wizard, click **Search** and select the **Search Scopes** tab.

Configuration

Add archive server connection

Server name:

Type:

< Back Next > Cancel

Enter the information and described below:

- a. **Server name** - name of the primary Archive Manager for Exchange server (eg. AMXSERVER) where the role will be set to **Archive** server.
 - b. **Type** - Select Exchange Archive Server.
2. Click **Next**. The *Set up the Archive database connection* window opens.
 3. If the database already exists, click **Import**. Otherwise click **Configure** to setup the Archive Manager for Exchange database. The *Database Connection Wizard* opens.

Database configuration

Database Connection Wizard

The Database Connection Wizard will help you to set up your server. It allows you to specify the database provider and describe the database connection parameters.

Please select the database provider you want to use:

☒ Microsoft SQL Server

☐ Oracle

The following page will let you specify the database connection parameters.

< Back Next > Cancel

4. Select either **Microsoft SQL Server** or **Oracle** and click **Next**. The database connection information window opens for the selected database.

Database configuration

Database Connection Wizard

Set up your Microsoft SQL Server connection.

Please enter parameters which will be used to create a connection to your Microsoft SQL Server.

Server name:

Initial catalog:

Schema name:

Authentication:

User name:

Password:

< Back Next > Cancel

For Microsoft SQL Server

- a. **Server name** - name of the SQL server (eg. **AMXDB**)
- b. **Initial catalog** - name of the Archive Manager for Files database (e.g. **MAMEXCH** which is the default name of the Archive Manager for Files database)
- c. **Schema name** - name of the SQL Schema (e.g. **dbo**)
- d. **Authentication** – authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**
- e. **User name** - database login user name if *SQL Server authentication* is the selected as the authentication mode.
- f. **Password** - password of the database user if *SQL Server authentication* is the selected as the authentication mode.

For Oracle

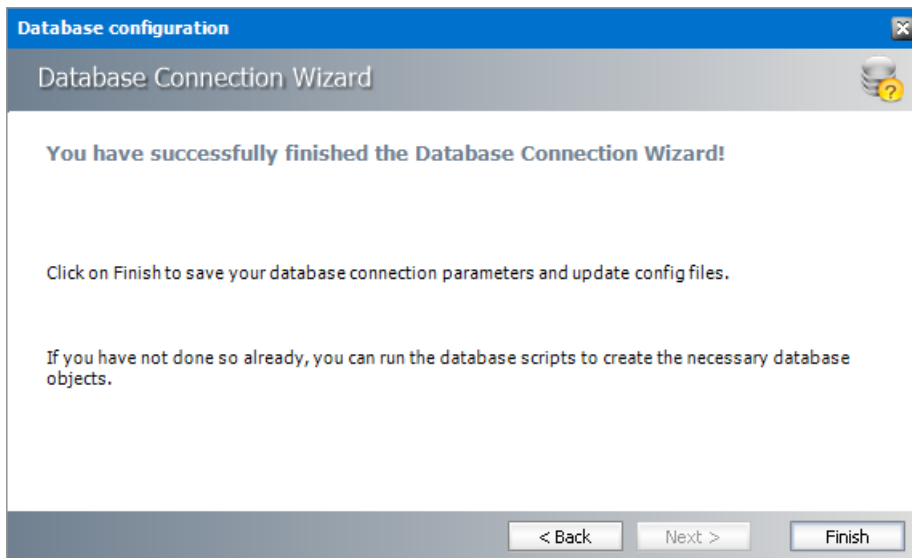
- a. **Oracle net name** - net service name that describes the network address of the HSM database in your `tnsnames.ora` file (eg. **AMXDB**)
 - b. **Schema** - name of the Archive Manager for Files database (e.g. **MAMEXCH** which is the default name of the Archive Manager for Files database)
 - c. **User name** - database login user name
 - d. **Password** - password of the database user
5. Click **Next** and then click **Yes** on the confirmation dialog that opens.

Database configuration

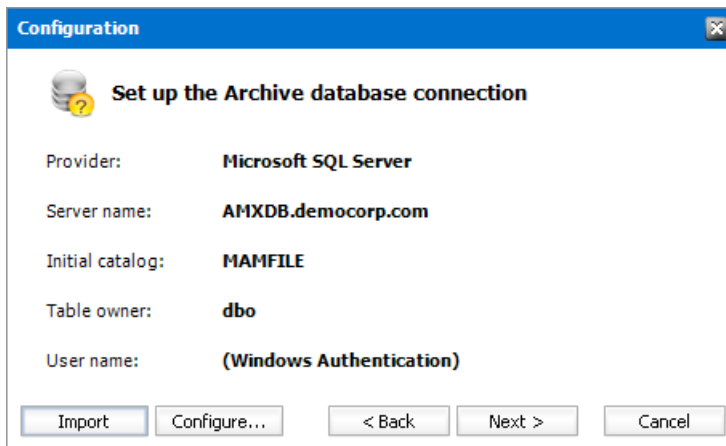
Database does not exists on the server. Shall we try to create it?

Yes No

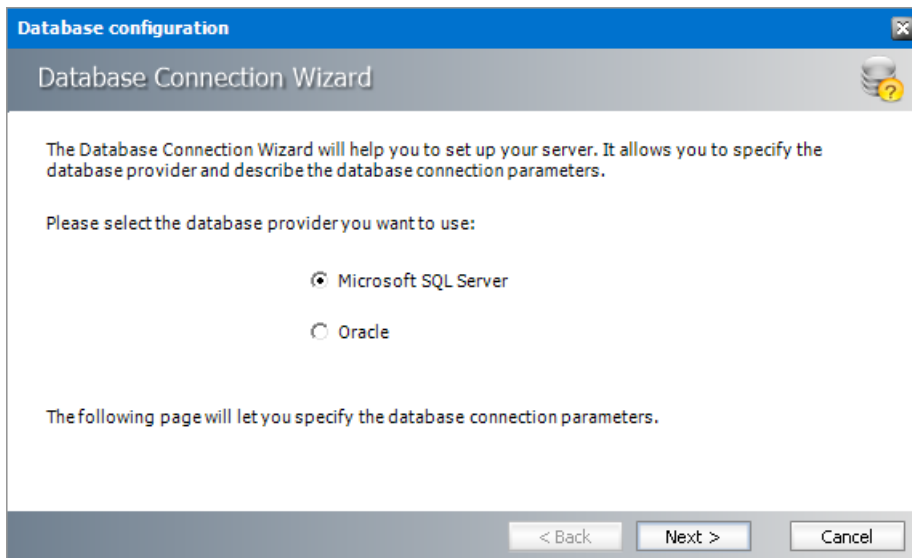
6. If the database connection is setup successfully, the configuration confirmation window opens.



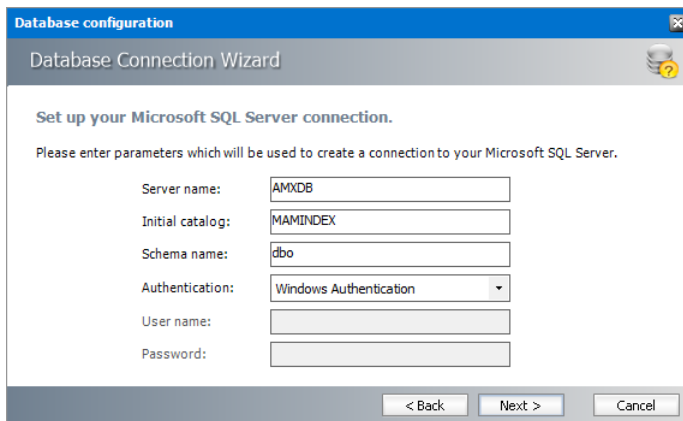
7. Click **Finish** to close the *Database Connection* wizard. The *Set up the Archive database connection* window reopens.



8. Click **Next**. The *Setup the Index database connection* window opens.
9. If the database already exists, click **Import**. Otherwise click **Configure** to setup the Index database connection. The *Database Connection Wizard* opens.



10. Select either **Microsoft SQL Server** or **Oracle** and click **Next**. The database connection information window opens for the selected database.



For Microsoft SQL Server

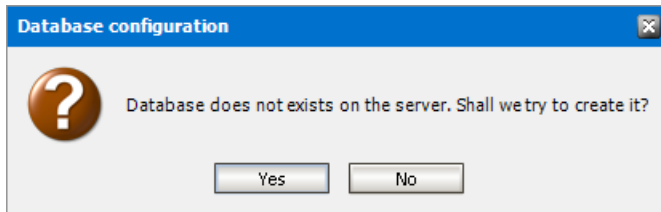
- g. **Server name** - name of the SQL server (eg. **AMXDB**)
- h. **Initial catalog** - name of the Archive Manager for Files database (e.g. **MAMINDEX** which is the default name of the Archive Manager for Files database)
- i. **Schema name** - name of the SQL Schema (e.g. **dbo**)
- j. **Authentication** – authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**
- k. **User name** - database login user name if *SQL Server authentication* is the selected as the authentication mode.
- l. **Password** - password of the database user if *SQL Server authentication* is the selected as the authentication mode.

For Oracle

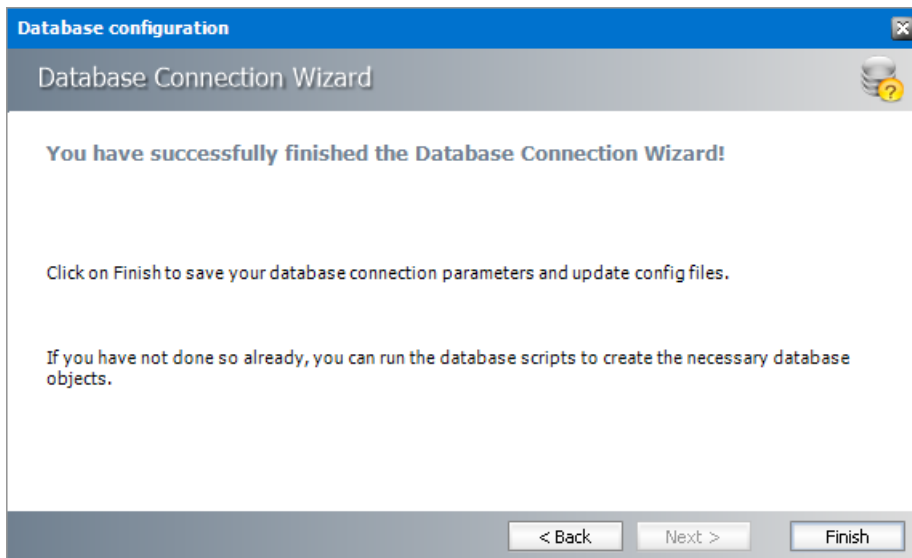
- e. **Oracle net name** - net service name that describes the network address of the HSM database in your `tnsnames.ora` file (eg. **AMXDB**)

- f. **Schema** - name of the Archive Manager for Files database (e.g. **MAMEXCH** which is the default name of the Archive Manager for Files database)
- g. **User name** - database login user name
- h. **Password** - password of the database user

11. Click **Next** and then click **Yes** on the confirmation dialog that opens.

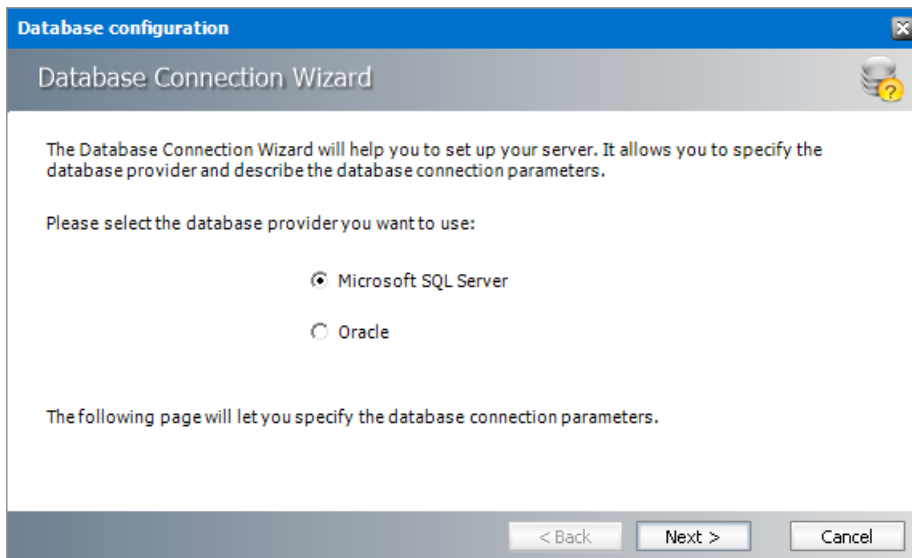


12. If the database connection is setup successfully, the configuration confirmation window opens.



13. Click **Finish** to close the *Database Connection* wizard. The *Setup the Index database connection* window opens.

- 1. If the database already exists, click **Import**. Otherwise click **Configure** to setup the Index database connection. The *Database Connection Wizard* opens.



2. Select either **Microsoft SQL Server** or **Oracle** and click **Next**. The database connection information window opens for the selected database.

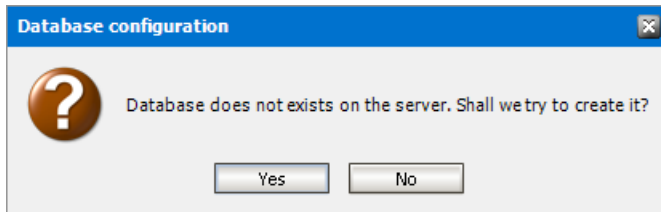
For Microsoft SQL Server

- a. **Server name** - name of the SQL server (eg. **AMXDB**)
- b. **Initial catalog** - name of the Archive Manager for Files database (e.g. **MAMINDEX** which is the default name of the Archive Manager for Files database)
- c. **Schema name** - name of the SQL Schema (e.g. **dbo**)
- d. **Authentication** – authentication type used for the database. Choose either **Windows authentication** or **SQL Server authentication**
- e. **User name** - database login user name if *SQL Server authentication* is the selected as the authentication mode.
- f. **Password** - password of the database user if *SQL Server authentication* is the selected as the authentication mode.

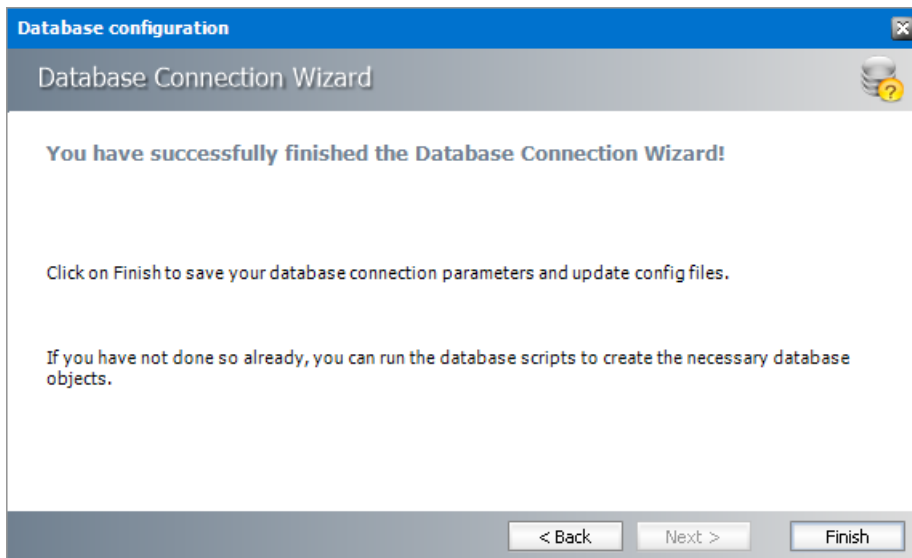
For Oracle

- a. **Oracle net name** - net service name that describes the network address of the HSM database in your `tnsnames.ora` file (eg. **AMXDB**)

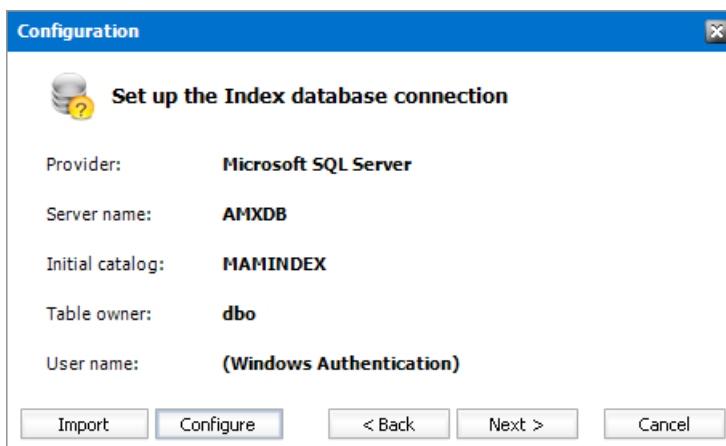
- b. **Schema** - name of the Archive Manager for Files database (e.g. **MAMINDEX** which is the default name of the Archive Manager for Files database)
 - c. **User name** - database login user name
 - d. **Password** - password of the database user
3. Click **Next** and then click **Yes** on the confirmation dialog that opens.



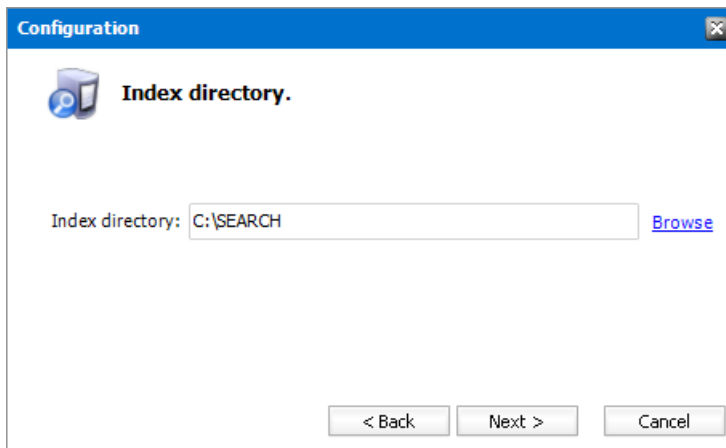
4. If the database connection is setup successfully, the configuration confirmation window opens.



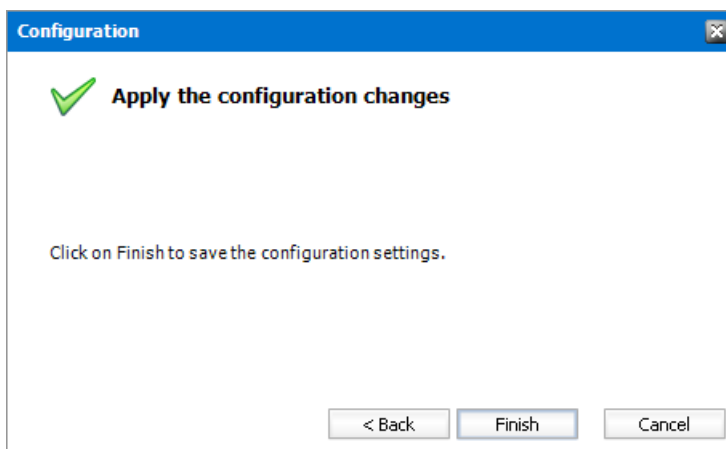
5. Click **Finish** to close the *Database Connection* wizard. The *Set up the Index database connection* window reopens.



14. Click **Next**. The *Index directory* window opens.

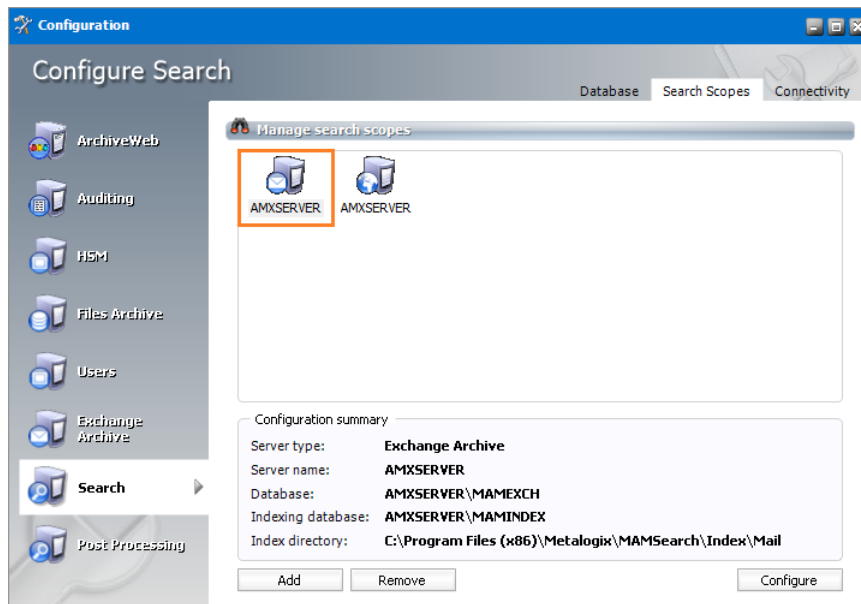


15. Click **Browse** to select or create a folder for the search index and then click **Next**. The *Apply the configuration changes* confirmation window opens.

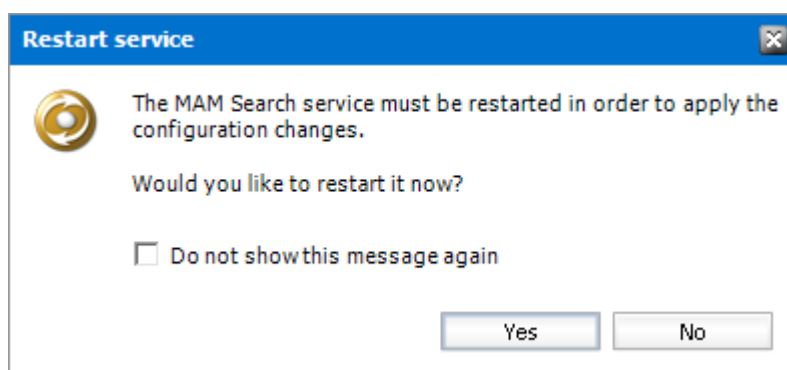


16. Click **Finish**. The Archive server for **Server type** = **Exchange Archive** is added to the *Manage search scopes* section. Click the icon for the Archive server that you added, and verify the information in the *Configuration summary* section.

i | **NOTE:** Search scopes for Archive Manager for Exchange and Archive Manager for Files are separate entities based on the **Server type**.



17. If the *Restart service* window opens, click **Yes** to restart the MAM service. Otherwise you must start the windows service manually.



18. Close the *Configuration* wizard.

Post-processing

The Archive Manager Search installer installs the Search and Post Processing services which allows a user to search and run specific tasks on each archived message. Post processing scopes must be configured to allow specific tasks from search results in ArchiveWeb. A Post Processing scope is a specified Archive server.

i NOTE: If you install Archive Manager for Exchange with the Express or Advanced installation option, Post Processing Scopes is automatically configured for you. If you install Archive Manager for Exchange manually, you must configure the Post Processing Scopes manually.

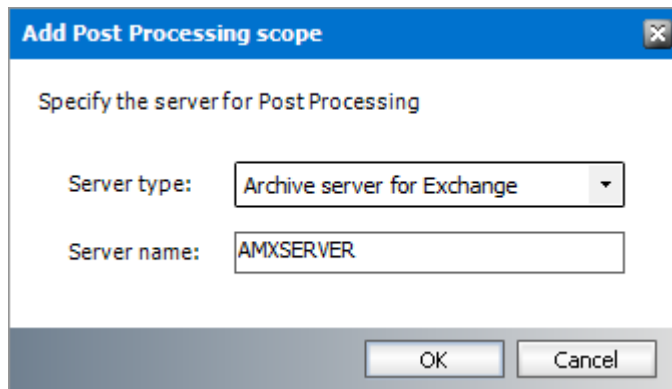
In this topic:

- [Steps to configure Post Processing Scopes](#)
- [Steps to install the SearchIndexPluginRange](#)

- [Steps to configure a Plugin](#)
- [Steps to specify a bookmark date](#)

Steps to configure Post Processing Scopes

1. From the feature panel on the left in the *Configuration* wizard, click **Search** and select the **Search Scopes** tab.

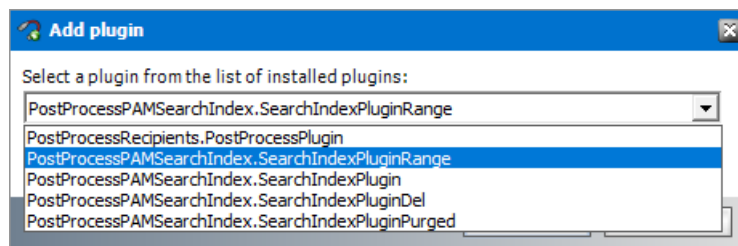


Enter the information and described below:

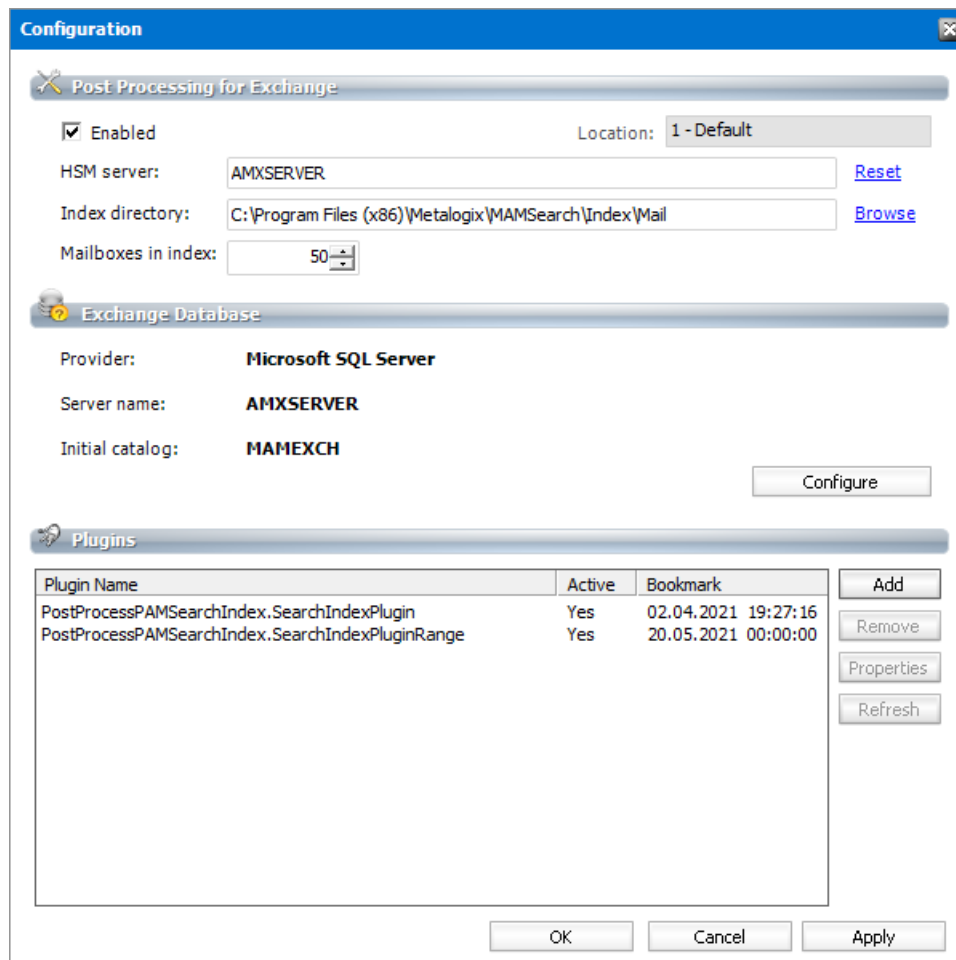
- a. **Server type** - select **Archive server for Files**
 - b. **Server name** - specify the name of the Archive Manager for Files server.
2. Click **OK**.
- Besides *Subject* and *From* text boxes in the Exchange Archive search, you can search the **To** field for items sent to specific recipient. To activate searching the **To** field, a post processing plugin must be installed. This plugin indexes mail recipients.

Steps to install the SearchIndexPluginRange

1. Open Archive Manager Configuration Tool from <installdir>\ Program Files (x86) \Common Files \ PAM \ PAMConfig \ PamConfig.exe.
2. Open the **Post Processing** tab.
3. Open the **Post Processing Scopes** tab.
4. Right-click on the scope and from the context menu select **Configure**.
5. Click **Add**.
6. Installed plugins will be loaded in the *Add Plugin* pop-up window. Select **PostProcessPAMsearchIndex.SearchIndexPluginRange** from the dropdown box and click **Add**.



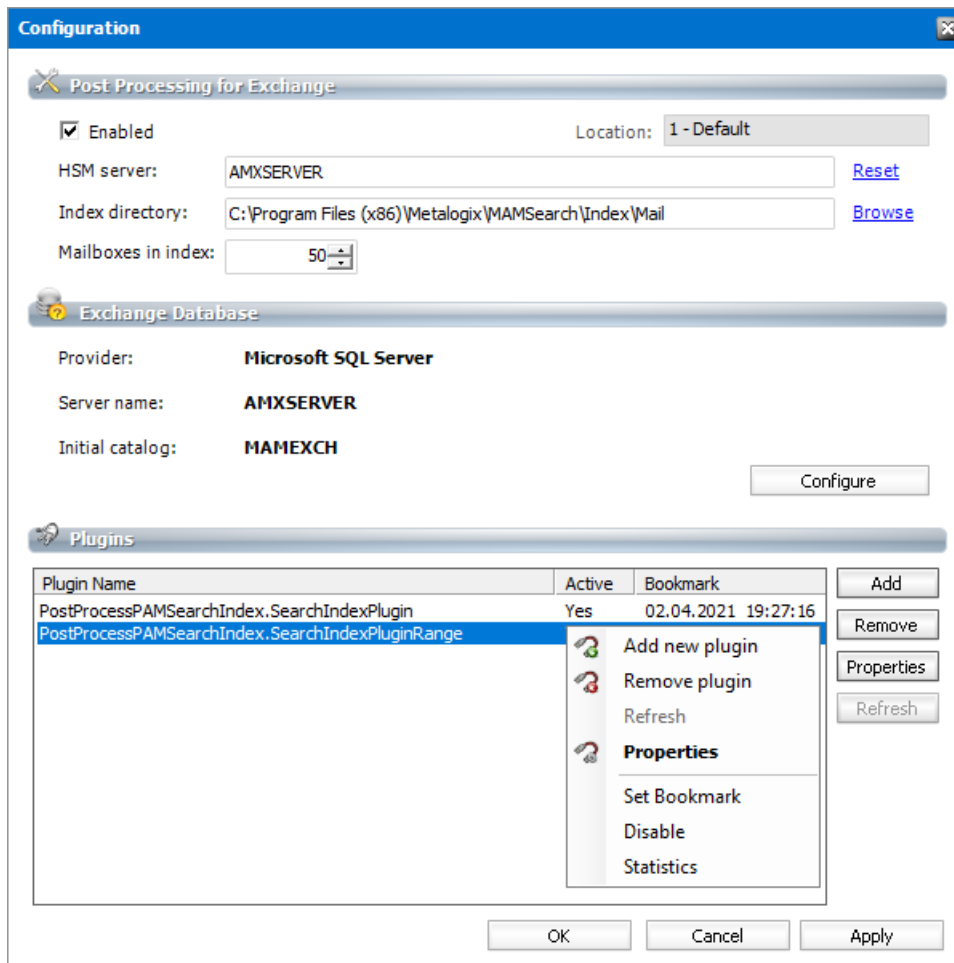
7. The plugin is listed in the *Plugins* list in *Configuration* tab. By default it is active.



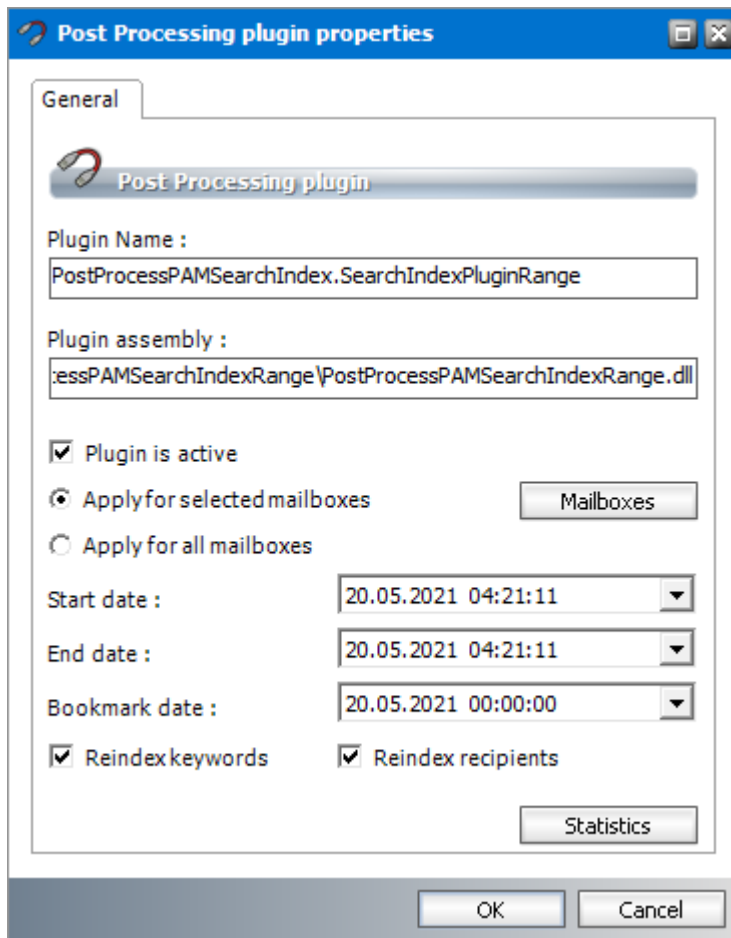
Steps to Configure a Plugin

When a new plugin is added to the *Plugins* list, there are no mailboxes specified by default. You must specify the mailboxes as well as the **Bookmark Date**. If no mailboxes are selected then post processing will not process any archived emails and attachments.

1. From the *Plugins* list, select the **PostProcessPAMsearchIndex.SearchIndexPluginRange** plugin. Right-click the plugin and click **Properties** from the context menu .

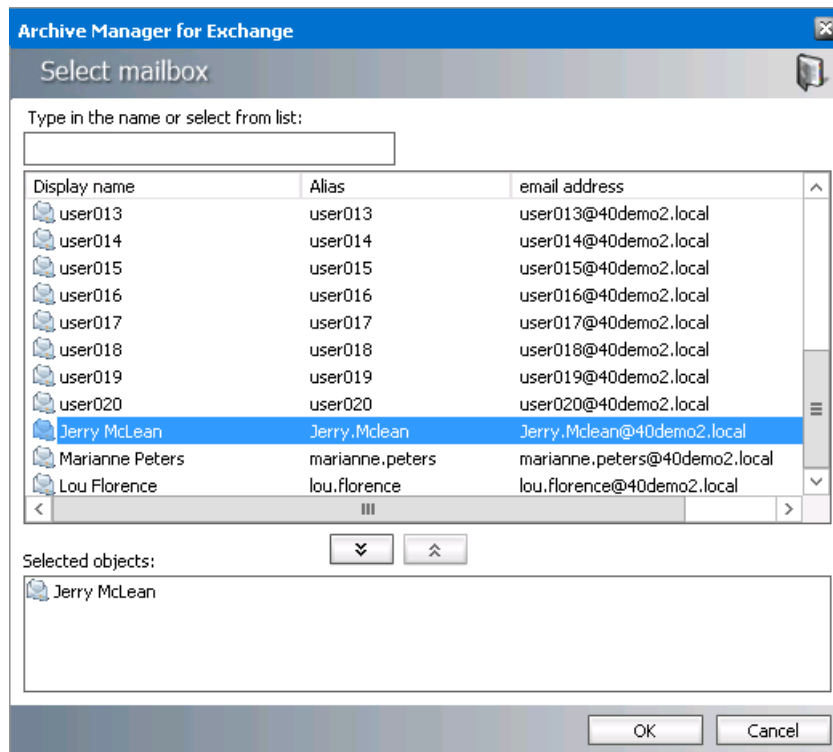


2. In the Plugin properties window set the properties as described below.

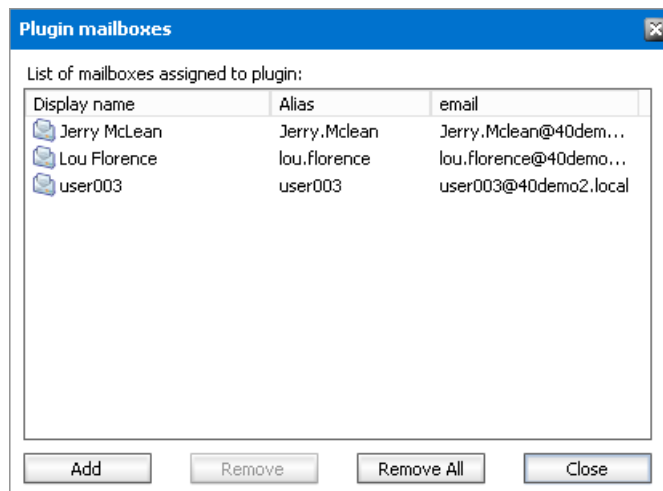


The plugin properties are as follows;

- a. **Plugin is active** - select this checkbox to activate the plugin.
- b. **Apply for selected mailboxes** - the plugin scope is determined by the mailboxes that you can select when you click **Mailboxes**.
 - i. In the *Plugin mailboxes* window click **Add** to add mailboxes.
 - ii. In the *Select mailbox* enter the name of a mailbox in the text box to search for the mailbox. Double-click the mailbox in the list to transfer it to the *Selected objects* section. In the *Selected objects* section you can check which users you have selected.



iii. Confirm by clicking **OK**. The selected mailboxes appear in the *Plugin mailboxes* window.



iv. Click **Close**.

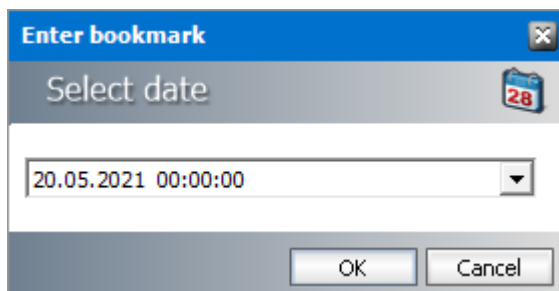
- c. **Apply for all mailboxes** - the plugin scope is across all mailboxes.
- d. **Start Date** - indicates the date when email indexing starts. Click the dropdown to set the date from the calendar popup.
- e. **End Date** - indicates the date when email indexing ends. Click the dropdown to set the date from the calendar popup.
- f. **Bookmark Date** - indicates the most recent index date and time. Click the dropdown to set the date from the calendar popup. When the plugin is installed, the **Bookmark Date** should be the same as the **Start Date**. If you want to index old email items, set the **Start**

Date and the **Bookmark Date** to the same date in the past from where you would want the indexing to begin.

- g. **Reindex keywords** - select this checkbox if keywords should be re-indexed within the specified data range.
- a. **Reindex recipients** - select this checkbox if email recipients should be re-indexed within the specified data range.

Steps to specify a bookmark date

1. Right-click the plugin and click **Set Bookmark** from the context menu.
2. In the *Enter bookmark* window specify the time. Click **OK**.



i **NOTE:** The bookmark date is displayed in the *Plugins* list in *Configuration* tab. If you reset the bookmark date, the change takes effect immediately, and there is no need to deactivate and activate the plugin again. If you remove a plugin by using the **Remove** button, it will stop completely without remembering where it stopped. If you then load that plugin again, you must configure it again.

General Data Protection Regulation

ArchiveWeb now supports option to manage the new General Data Protection Regulation (GDPR) regulations. User can create a retention change request (for Exchange and/or Files items) via context menu. When the request is created, approver(s) get email notification and can review the request. User who created a request is informed via email notification once approver has processed the request. User (who has appropriate permission) can follow the requests in ArchiveWeb by clicking on **Retention** tab. User can see open, approved and denied requests and also the history.

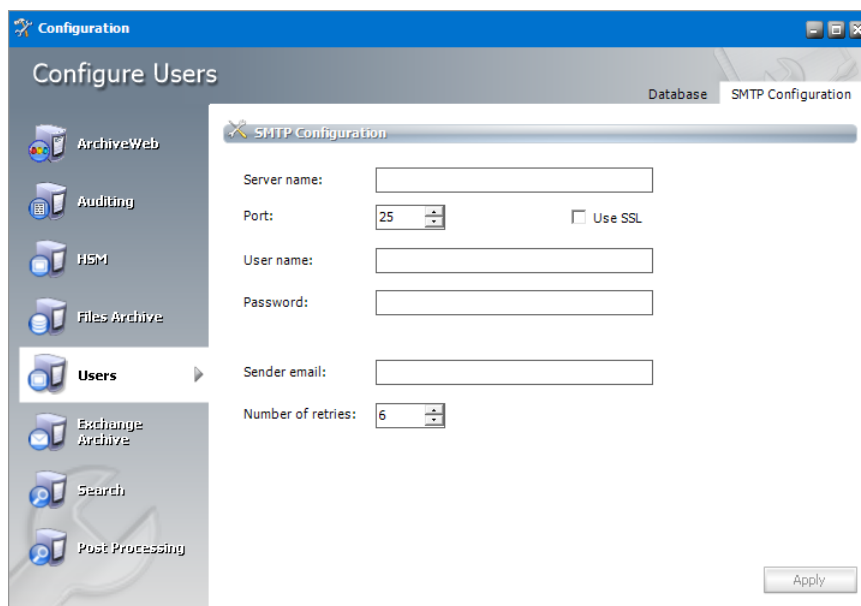
Approver(s) except of these read-only functions (opened, approved, denied requests and history) have ability to export all items from request to ZIP file, denied the entire request and approve (all or selected) items from request.

To use all features of new *Retention functionality* the working SMTP server is needed, however to use *Retention functionality* the SMTP is not mandatory. The SMTP service is used to send notification emails to approver(s) and/or retention requester(s).

If you'd like to use SMTP service (set SMTP server to use with ArchiveWeb) see the next section: Setting SMTP server under Archive Manager Configuration (PamConfig).

Archive Manager Configuration (PamConfig)

- First, configuration has to be done outside of ArchiveWeb. Open **Archive Manager Configuration Tool** from <installdir>\ Program Files (x86) \ Common Files \ PAM \ PAMConfig \ PamConfig.exe.
 - Click on **Users** tab.
 - Make sure that database and scripts are up to date.
 - Click on **Users** tab / **SMTP configuration** tab and set the required settings



- Server name – specify SMTP server name or IP address where the SMTP server is installed
- Port – specify the SMTP port
- Use SSL – check this button if the SMTP requires SSL connection
- User name, Password – specify SMTP credential
- Sender email – specify email address which will be used to hand-shake with the SMTP
- Number of retries – specify number of retries the SMTP will try to send the message

ArchiveWeb

Permissions

New Retention permissions have been added to ArchiveWeb:

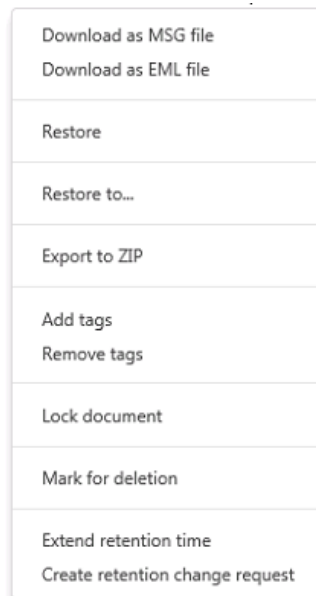
Permission	Default value	Meaning
Approve retention change requests	Denied	Allows to approve or denied the retention change request and export items
Create retention change request	Denied	Allow to create a new retention change request and to display Retention tab at the

		top of the navigation bar with ability to list open, approved, denied requests and history.
--	--	---

Archive tab – Exchange

User who has at least “*Create retention change request*” permission will be able to create a retention change request from the context-menu for selected item(s).

For single item – in a preview pane, click on [...] action menu and select **Create retention change request** option



For multi selected items – from context-menu select **Create retention change request** option

In both cases the following pop-up window will appear:

CREATE RETENTION CHANGE REQUEST ×

Task name

☐ Delete request
 ☐ Set retention time to: months
 ☐ Delete items after the retention expires.

Reason for request (mandatory)

Send request

- **Task name** – name for retention change request
- **Delete request** – select to create a delete request
- **Set retention time to** – select to set a new retention time in months. The purpose for this option is create a retention change request to decrease retention time

- **Delete items after the retention expires** – by selecting this option the expired items will be automatically deleted
- **Reason for request** – description of request

By clicking on **Send request** the retention change request will be submitted for approval. Newly created retention change request will appear in *Open* and *History* grids in **Retention** tab.

NOTE: Only items which have no *Legal hold* flag set will be added to retention change request.

When the SMTP is correctly set, notification email will be send for user(s) who have “*Approve retention change requests*” permission set.

Example of notification email:

Request Notification

administrator@devx.local

Sent: Fri 4/27/2018 3:31 PM

To: Administrator

Dear Approver

DEVX\testuser1 has created a Retention request task Ex [#611d244a4200ca22669f6e0b3431e909] on 4/27/2018 3:30:39 PM.

Request details:

Set to 7 months

Please Log in ArchiveWeb and [review the request](#).

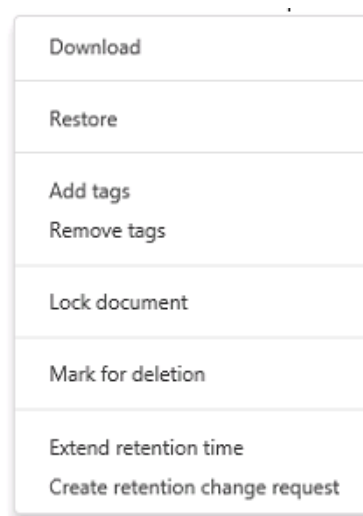
Thank you.

DEVX\testuser1

Archive tab – Files

User who has at least “*Create retention change request*” permission will be able to create a retention change request from the context-menu for selected item(s).

For single item – in a preview pane, click on [...] action menu and select **Create retention change request** option.



For multi selected items – from context-menu select **Create retention change request** option.

In both cases the following pop-up window will appear:

CREATE RETENTION CHANGE REQUEST ×

Task name

☐ Delete request
☐ Set retention time to:

☐ Delete items after the retention expires.

Reason for request (mandatory)

- **Task name** – name for retention change request
- **Delete request** – select to create a delete request
- **Set retention time to** – select to set a new retention time via calendar. The purpose for this option is create a retention change request to decrease retention time
- **Delete items after the retention expires** – by selecting this option the expired items will be automatically deleted
- **Reason for request** – description of request

By clicking on **Send request** the retention change request will be submitted for approval. Newly created retention change request will appear in *Open* and *History* grids in **Retention** tab.

NOTE: Only items which have no *Legal hold* flag set will be added to retention change request.

When the SMTP is correctly set, notification email will be send for user(s) who have “*Approve retention change requests*” permission set.

Request Notification

administrator@devx.local

Sent: Mon 4/30/2018 5:48 PM

To: Administrator

Dear Approver

DEVX\administrator has created a Retention request task **Fi-folders** [#151c6585ee94dff2d8fadb20321787d] on 4/30/2018 5:48:17 PM.

Request details:

Obsolete files.

Please Log in ArchiveWeb and [review the request](#).

Thank you.

DEVX\administrator

Retention tab

This menu option is available to user who has at least “*Create retention change request*” permission set. The user can see list of open, approved, denied requests and history.

Column	Meaning
--------	---------

Task name	Retention change request task name
Request type	Request type: Change retention request – request to decrease retention time Delete request – request to delete item
Requested retention	Contains retention time requested in Change retention request task; for Delete request this column is empty
Automatic Deletion	Informs if the option "Delete items after the retention expires" is activated for the given item
Submitted by	Name of the user who submitted the request
Date created	Date-time when the request was submitted
Processed by	Name of the user who approved/denied the request
Date processed	Date-time when the request was approved/denied
Submitted items	Number of items in submitted request
Status	Request task's status
Reason	Approve/Denied reason
Reason for request	Reason the submitter entered

OPEN REQUESTS

When a user has “*Approve retention change requests*” permission, it means the user is an approver and has permission to Approve, Denied or Export request items. In this case when the OPEN REQUESTS tab contains any request, after clicking on a request in a grid, the item list grid should look like (double-click on item in the list grid will invoke item preview in a pop-up window):

Result count: 25 Total rows selected: 25			
Clear selection			
<input checked="" type="checkbox"/>	FOLDER	NAME	WARNING
<input checked="" type="checkbox"/>	C:\FILETY\050.items\	file01.txt	
<input checked="" type="checkbox"/>	C:\FILETY\050.items\	file02.txt	
<input checked="" type="checkbox"/>	C:\FILETY\050.items\	file03.txt	
First Prev Page: 1 of 2 Next Last			
<input type="button" value="Approve selected"/> <input type="button" value="Deny all"/> <input type="button" value="Export all"/>			

- **Approve selected** – selected items will be prepared for approval process. After the approver confirms the following dialog, the items will be asynchronously processed

REQUEST APPROVAL



Reason for change (mandatory)

Retention time for the selected items will be changed. This change cannot be reversed and the document will be irretrievably deleted (based on the new retention time). The process is logged.

☐ I understand that the process is not reversible

Approve

Cancel

If the SMTP is correctly set the submitter will be informed via email, example of notification email

From: administrator@devx.local
To: JohnYoung@devx.local
Cc:
Subject: Request Reviewed

Dear DEVXJohnYoung [JohnYoung@devx.local]

Your Retention request task **Ex3-del** [#e2c0ea1003b695642003910c51ffa709] from 4/30/2018 8:29:39 AM has been reviewed.

Review details:
Approver: DEVXadministrator
Detail: Ok, approved.
Request status: Approved [4/30/2018 8:31:45 AM]

Thank you.
DEVXadministrator

- **Deny all** – all items (no selecting is required) will be prepared for deny process. After the approver confirms the following dialog, all items will be denied, no operation from retention change request will be processed and if the SMTP is correctly set the submitter will be informed via email

DENY REQUEST



Reason for deny (mandatory)

Deny

Cancel

- **Export all** – all items will be exported to ZIP file. There is option to encrypt the output ZIP file with a password

APPROVED REQUESTS

Grid contains list of approved requests

OPEN REQUESTS

APPROVED REQUESTS

DENIED REQUESTS

HISTORY

Result count: 1

Drag a column header here to group by that column

TASK NAME	REQUEST TYPE	REQUESTED RETENTION	AUTOMATIC DELETION	SUBMITTED BY	DATE CREATED	PROCESSED BY	DATE PROCESSED	AFFECTED ITEMS	STATUS	REASON
Delete files	Delete request		<input type="checkbox"/>	121DEMO1\user001	5/24/2018 11:05:05 AM	121DEMO1\Administrator	5/24/2018 12:20:26 PM	25	Completed	Approved.

First

Prev

Page: 1 of 1

Next

Last

Items per page: 20

DENIED REQUESTS

Grid contains list of denied requests

OPEN REQUESTS

APPROVED REQUESTS

DENIED REQUESTS

HISTORY

Result count: 1

Drag a column header here to group by that column

TASK NAME	REQUEST TYPE	REQUESTED RETENTION	AUTOMATIC DELETION	SUBMITTED BY	DATE CREATED	PROCESSED BY	DATE PROCESSED	AFFECTED ITEMS	STATUS	REASON
Obsolete files	Change retention request	5/22/2018	<input checked="" type="checkbox"/>	121DEM01\user001	5/24/2018 11:12:37...	121DEM01\Administrator	5/24/2018 12:23:42...	25	Completed	Denied.

FirstPrevPage: 1 of 1NextLast

Items per page: 20

HISTORY

Grid contains list of requests (open, approved and denied). For approved and denied requests after clicking on a request in a grid, items grid will contain list of items (double-click on item in the list grid will invoke item preview in a pop-up window)

OPEN REQUESTS
APPROVED REQUESTS
DENIED REQUESTS
HISTORY

Result count: 3

Drag a column header here to group by that column

TASK NAME	REQUEST TYPE	REQUESTED RETENTION	AUTOMATIC DELETION	SUBMITTED BY	DATE CREATED	PROCESSED BY	DATE PROCESSED	SUBMITTED ITEMS	STATUS	REASON FOR REQUEST
Obsolete files	Change retention request	5/22/2018	<input checked="" type="checkbox"/>	121DEMOT1user001	5/24/2018 11:12:37...	121DEMOT1Administrator	5/24/2018 12:23:42...	25	Completed	These files can be removed.
Set retention time for files	Change retention request	5/20/2018	<input type="checkbox"/>	121DEMOT1user001	5/24/2018 11:10:36...			25	Waiting	Modifying retention time for f
Delete files	Delete request		<input type="checkbox"/>	121DEMOT1user001	5/24/2018 11:05:05...	121DEMOT1Administrator	5/24/2018 12:20:26...	25	Completed	These files can be removed.

First Prev Page: 1 of 1 Next Last

Items per page: 20

processed waiting

Result count: 22

FOLDER	NAME	APPROVED	ERROR
C:\FILETY\050.items\	file01.txt	<input checked="" type="checkbox"/>	
C:\FILETY\050.items\	file03.txt	<input checked="" type="checkbox"/>	
C:\FILETY\050.items\	file04.txt	<input checked="" type="checkbox"/>	
C:\FILETY\050.items\	file05.txt	<input checked="" type="checkbox"/>	
C:\FILETY\050.items\	file06.txt	<input checked="" type="checkbox"/>	
C:\FILETY\050.items\	file07.txt	<input checked="" type="checkbox"/>	
C:\FILETY\050.items\	file08.txt	<input checked="" type="checkbox"/>	
C:\FILETY\050.items\	file09.txt	<input checked="" type="checkbox"/>	

First Prev Page: 1 of 2 Next Last

The list grid contains “processed” and “waiting” filters.

Column	Meaning
From	For Exchange items – sender’s name
To	For Exchange items – recipient(s) names
Subject	For Exchange items – item’s subject
Folder	For Files items – folder’s name
Name	For Files items – file’s name
Approved	Indicates whether the item was approved
Error	Contains error message, if any
Warning	Contains warning messages, if any

- **Processed** – contains list of processed items.
 - For “Change retention request” – items with selected “Approved” column have been processed, retention time have been changed; if error occurred the “Error” column will contain a message
 - For “Delete request” – items with selected “Approved” column have been processed by Delete job, item has been deleted; if error occurred the “Error” column will contain a message
- **Waiting** – contains list of items waiting for processing.
 - For “Delete request” – items with selected “Approved” column waiting for Delete job to process the items

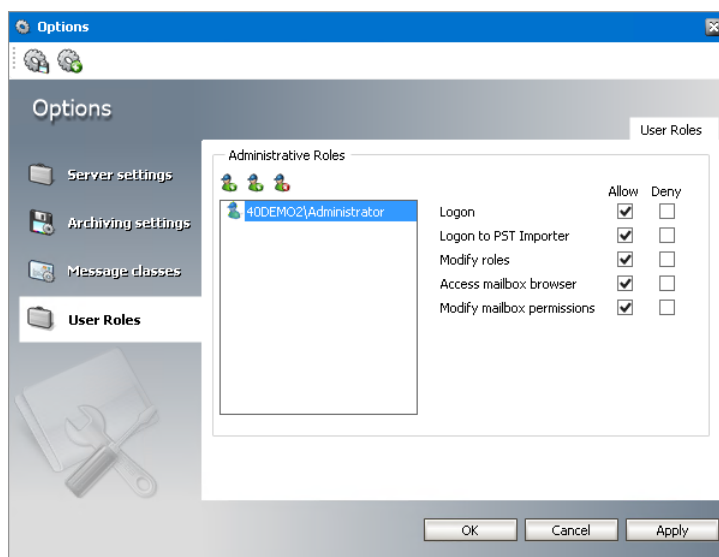
ArchiveWeb Settings

As default, only the super-user specified in Archive Manager for Exchange or Archive Manager for Files (see note below) can access ArchiveWeb and all its functions. If another user/group should be able to manage roles, super-user can allow access for them in the following ways:

- in ArchiveWeb under logged on user / **Manage settings** / **Permissions**
- in Archive Manager for Exchange Administration Center on the **Tools** / **Options** / **User Roles** the given user has to be added with **Modify roles** option checked
- in the Archive Manager for Files Administration Center on the **Settings** / **User management** tab the given user must have the **User management** permission allowed

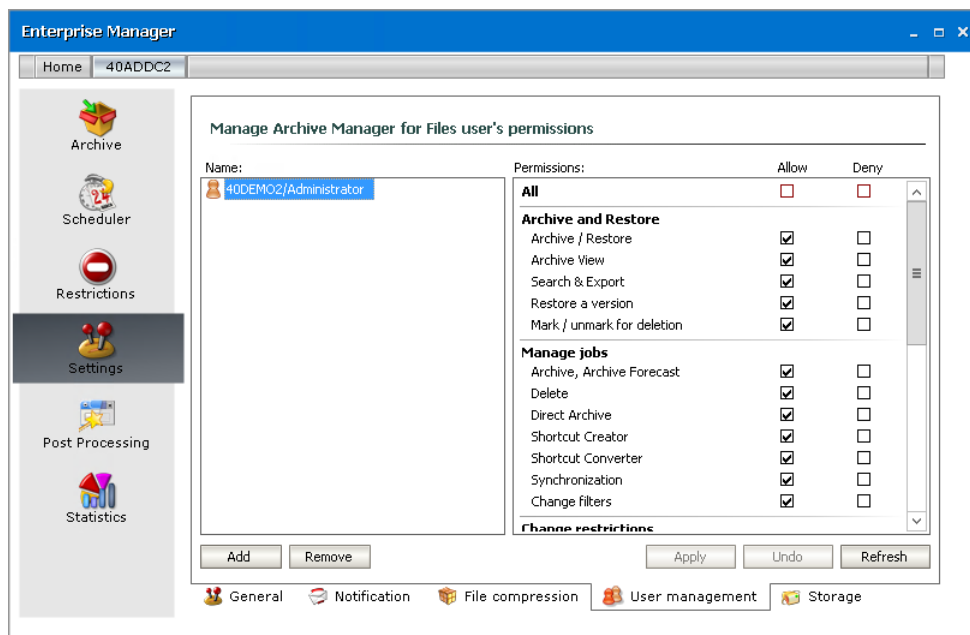
Please note: Super-user is specified in:

- Archive Manager for Exchange Administration Center / Tools / Options / User Roles)



or

- Archive Manager for Files (Enterprise Manager / Settings / User management)



Roles and Permissions pages allow permission management on user/group level. Individual users can inherit permission or can be granted direct permissions. The priority of permissions follows this order:

1. Direct permission defined for a user (blue highlight under Permissions) on a server
2. Global direct permission defined for a user (blue highlight under Permissions)
3. Inherited permission (yellow highlight under Permissions) on a server
4. Global inherited permission (yellow highlight under Permissions)
5. Default settings (no highlight under Permissions)

All defined permissions apply only for the given instance of ArchiveWeb.

On these pages you can allow or deny access to ArchiveWeb features and menu options for individual users or groups, i.e. allow or deny roles. Under **Roles**, users are assigned to roles. Under **Permissions**, roles are assigned to users.

Roles

The *Roles* page displays permissions categorized by roles. These permission sets can be granted to users and groups either globally or by server and location. The *Roles* page helps you revoke or grant a specific permission to one or more users and groups. See the [Permissions](#) page to revoke or grant one or more permissions to a specific user or group.

Steps to access the Permissions page

1. Log in to ArchiveWeb.
2. From the main menu, click the username dropdown and then select **Manage settings**.
3. From the local toolbar, click **Roles**.

Steps to grant a permission to users or groups:

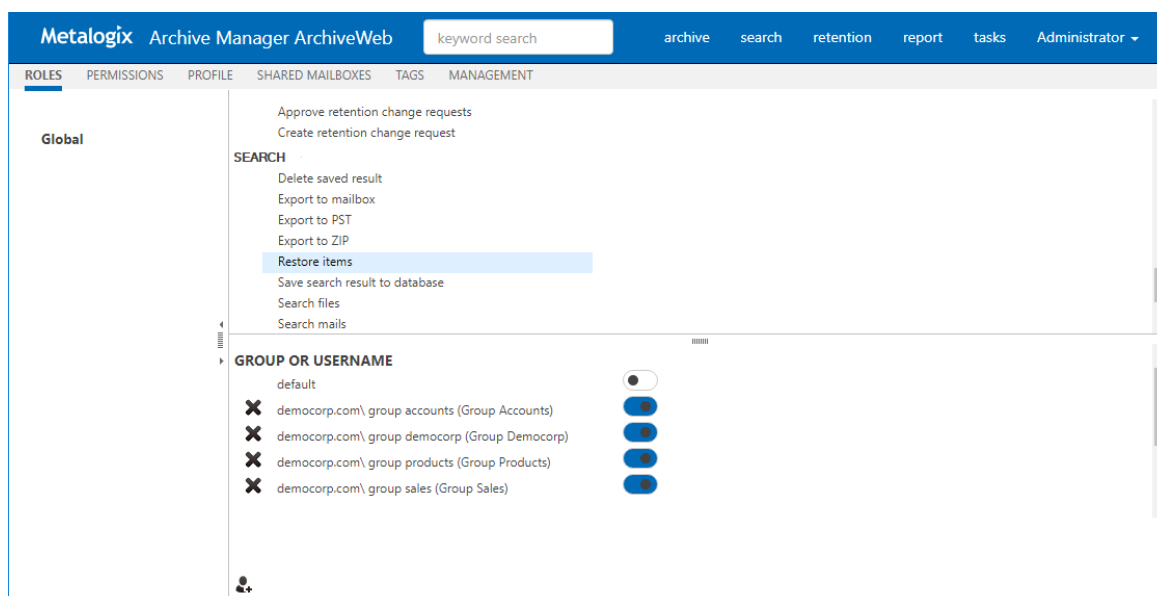





NOTE:

If the **UseGlobalPermissionsForAllServers** key is set to **true** or this key does not exist in the *web.config* file, the *Roles* page lists **Global** settings. In this case permissions for users and groups are set globally and are applicable to all servers.

If the **UseGlobalPermissionsForAllServers** is set to **false** in the *web.config* file, all available servers will be listed and permissions can be set for users or groups for a selected server or location. Using this option can slow down the login process because all accessible servers and locations must be searched for role assignments.

1. Either click **Global** or select a server to display the permissions in the right-hand pane.
2. Select a permission from the right-hand pane. In the *Group and Username* section, **Default** indicates the default settings for this permission. Specific users and groups can be added to this section to change their default permissions setting.



3. To add a user or group:
 - a. Click  in the *Group and Username* section.
 - b. In the *Find Users or Groups* window, enter the **Domain** name and specify a search expression. User can be searched by user-name, logon-name or display-name. You can use the asterisk (*) as a wildcard in the search criteria. To search for Microsoft 365 users, select **Office 365 user** and then search for the user.
 - c. Select the users or groups to add. You can use **Select all** to add all users and groups in the search result.
 - d. Click **OK** to add the selected users and groups to the permission.
4. Set the toggle switch to  to grant the permission. Set the toggle switch to  to revoke the permission.

5. To remove a user or group, click **X** next to the user or group. The default setting will be applied to all removed users and groups.


Permissions

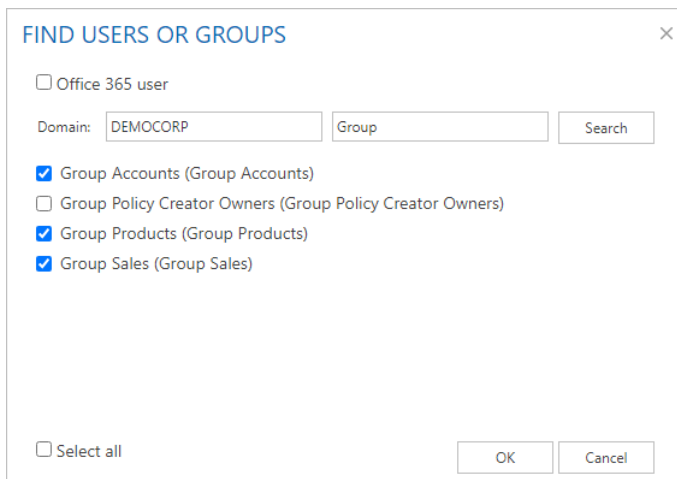
The *Permissions* page helps you to revoke or grant one or more permissions to a specific user or group.


Steps to access the Permissions page

1. Log in to ArchiveWeb.
2. From the main menu, click the username dropdown and then select **Manage settings**.
3. From the local toolbar, click **Permissions**.

Steps to add users or groups:


1. Click  in the left-hand pane.
2. In the *Find Users or Groups* window, enter the **Domain** name and specify a search expression. User can be searched by user-name, logon-name or display-name. You can use the asterisk (*) as a wildcard in the search criteria. To search for Microsoft 365 users, select **Office 365 user** and then search for the user.





 **NOTE:** Microsoft 365 users must be imported into Archive Manager for Exchange.

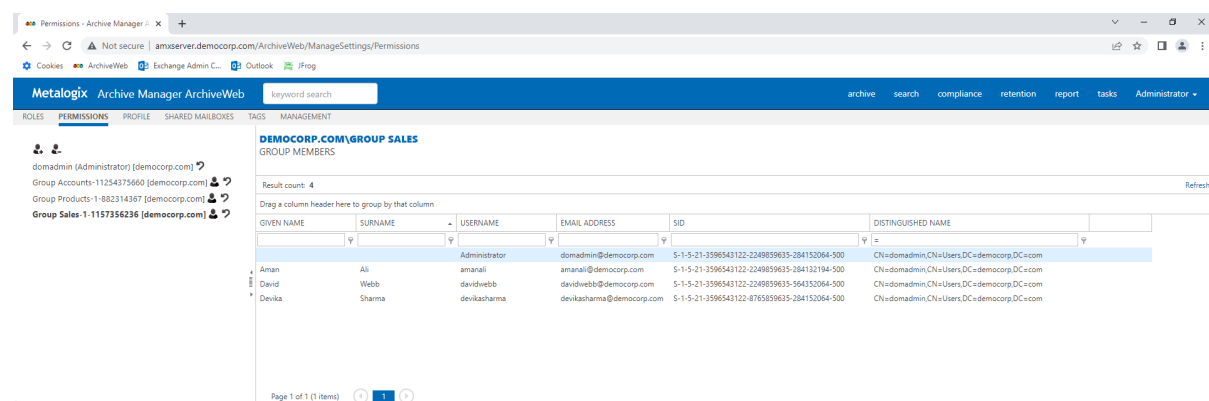
3. Select the users or groups to add. You can use **Select all** to add all users or groups in the search result.
4. Click **OK** to add the selected users and groups to the *Permissions* page.

To remove users or groups:

1. Click  in the left pane.
2. In the **Remove users or groups** window, select the users or groups to remove. You can remove only users or groups that have been modified. If you want to remove all user or groups that were not modified after being added, you must log out and log in again.
3. Click **OK**.




To view group members:

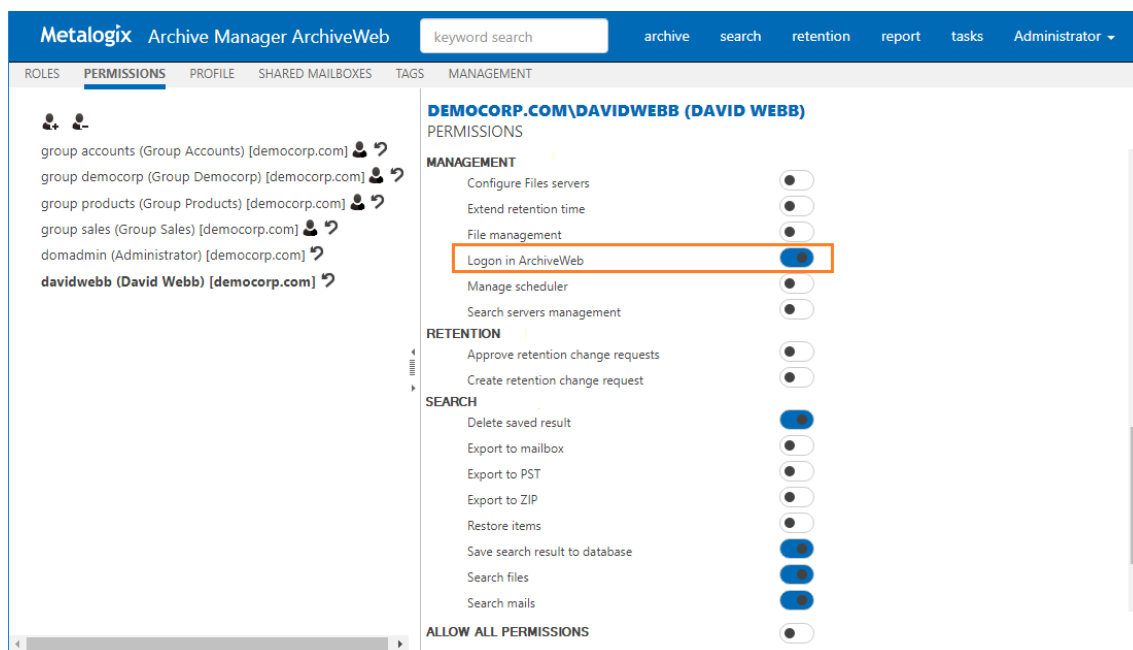
1. Click  next to the group for which you want to view the members. The members are listed in the right-hand pane.
2. Enter a search criteria for any of the columns and click the search filter  to select a search operation. You can set search criteria for multiple columns. The **Result count** indicates the number of members in the group.
3. Click **Refresh** to get the latest list of members if users are added or removed from the group in active directory while you are logged in to ArchiveWeb.
4. If groups have more members than can be displayed on the page, they are presented in multiple pages. You can use the scroll buttons at the bottom of the right-hand pane to scroll through multiple pages.




GIVEN NAME	SURNAME	USERNAME	EMAIL ADDRESS	SID	DISTINGUISHED NAME
Administrator		domadmin@democorp.com	domadmin@democorp.com	S-1-5-21-3596543122-2249859635-284152064-500	CN=domadmin,CN=Users,DC=democorp,DC=com
Aman	Ali	amanali	amanali@democorp.com	S-1-5-21-3596543122-2249859635-284152064-500	CN=domadmin,CN=Users,DC=democorp,DC=com
David	Webb	davidwebb@democorp.com	davidwebb@democorp.com	S-1-5-21-3596543122-2249859635-284152064-500	CN=domadmin,CN=Users,DC=democorp,DC=com
Devika	Sharma	devikasharma	devikasharma@democorp.com	S-1-5-21-3596543122-2249859635-284152064-500	CN=domadmin,CN=Users,DC=democorp,DC=com

To grant permissions to users and groups:

1. Select the user or group from the left-hand pane. If the user or group is not listed, click  and use the *Find user or group* window to add the user or group.
2. The permissions available for the user or group are listed in the right-hand pane. They are categorized for ease of use.
3. Locate the permission that you want to grant or revoke. Set the toggle switch to  to grant the permission. Set the toggle switch to  to revoke the permission. For example, all users are allowed to log in to ArchiveWeb because the **Logon to ArchiveWeb** permission is granted by default. Only the super-user or administrator has the ability to grant or revoke this permission for a user or group.



4. You can grant or revoke all permissions for a user or group by setting the **Allow all permissions** toggle switch at the bottom of the right-hand pane.
5. You can reset the permissions to default settings when you click  next to the user of group in the left-hand pane.

Permissions list

The table below lists default ArchiveWeb permissions categorized by roles. **Allow all permissions** is not granted to users or groups by default.

Permission	Default value
Auditing	
Access all mailboxes	Denied
Apply tags	Denied
Auditor access	Denied
Export auditing logs	Denied
Export results to ZIP	Denied
Show auditing logs	Denied
Compliance	
Allow policy managed download	Denied
Compliance management	Denied
Exchange	

Add comments to mails	Denied
Apply tags	Allowed
Compare mailbox with archive	Allowed
Delete item	Denied
Restore items	Denied
Set "Legal Hold" flag	Denied
Show "Legal hold" flag	Denied
Show comments	Denied
Show lost data	Allowed
Show own mailbox	Allowed
Show public folders	Allowed
Show shared mailbox	Allowed
File	
Add comments to files	Denied
Apply tags	Allowed
Compare file system with archive	Denied
Delete files	Denied
Find files without shortcut	Denied
Restore files	Denied
Set "Legal Hold" flag	Denied
Show "Legal hold" flag	Denied
Show comments	Denied
Show files server	Allowed
Journaling	
Access journal	Denied
Management	
Configure Files servers	Denied
Extend retention time	Denied
File management	Denied
Login in ArchiveWeb	Allowed
Manage scheduler	Denied
Search servers management	Denied
Retention	
Approve retention change requests	Denied

Create retention change request	Denied
Search	
Delete saved result	Allowed
Export to mailbox	Denied
Export to PST	Denied
Export to ZIP	Denied
Restore items	Denied
Save search result to database	Allowed
Search files	Allowed
Search mails	Allowed
Statistics	
Export statistics	Allowed
Files - Show statistics	Denied
Mails - Show statistics	Denied

Auditor Access


Journals in Exchange Server are used to enforce legal, regulatory, and organizational compliance in organizations by recording all or targeted email messages. In addition to journals, mailbox audit logs are also used to track who logs on to the mailboxes in your organization and what actions are taken by delegate users.

Auditor Access grants users the ability to view all mailbox journals that are imported, audit logs, retentions and search. Use this powerful feature with discretion.

To use this feature you must grant **Auditor access** permissions to at least two users. The two-user authentication mechanism works as follows: If John wants to log in as an auditor, he must have the **Auditor access** permission, and he must be able to specify the user name of another user who has the **Auditor access** permission, before he can successfully log in as an auditor.

Steps to grant the Auditor access permission to a user

1. Log in to Metalogix Archive Manager ArchiveWeb with the credentials of a user who has the ability to grant permissions to other users.
2. From your account name dropdown, select **Manage Settings**.
3. Select the **Permissions** tab.
4. Click the **Add User** icon and locate the user from the **Find Users or Groups** search window.
5. Select the user from the user list on the left to display the permission set in the right-hand pane.

- Set the toggle switch to  to grant the **Auditor access** permission to the user.

i | **NOTE:** No user is granted this permission by default. As a result auditor access is denied to all users including the super-user or the administrator.

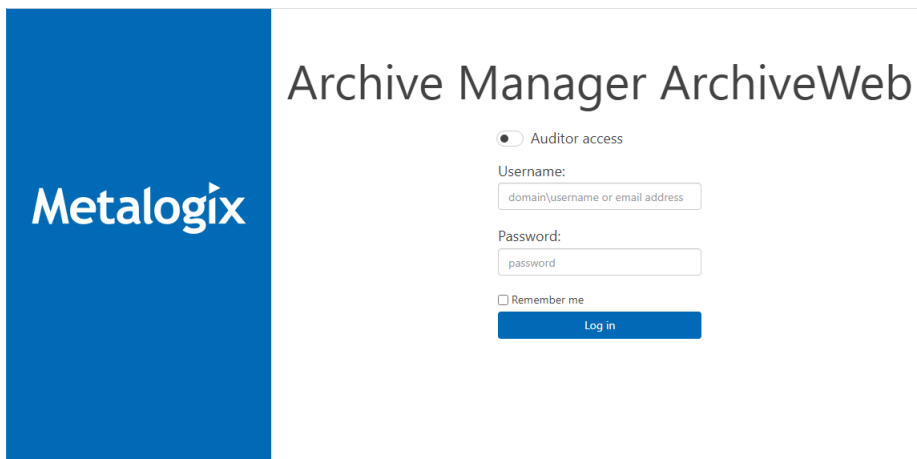
- In the confirmation dialog that appears, click **Yes** to grant the **Auditor access** permission.

i | **NOTE:** Granting the **Auditor access** permission automatically grants all permissions of type **Auditing**.

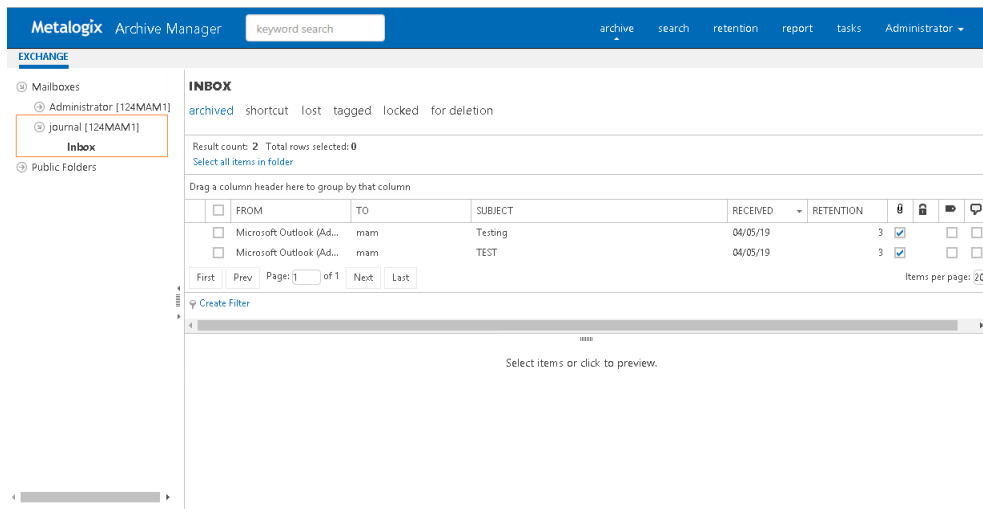
- Repeat the above steps to grant the **Auditor access** permission to at least one or more users as needed.

Steps to log in as an auditor

- If you have the **Auditor access** permission, enter your user name and password in the ArchiveWeb log in page.
- Toggle the **Auditor access** button to turn on the feature. Notice that the user name field label changes to **Auditor 1 user name**. This is the account that will be used to log in as an auditor.
- Click **sign in**. The **Auditor 2 user name** field appears.



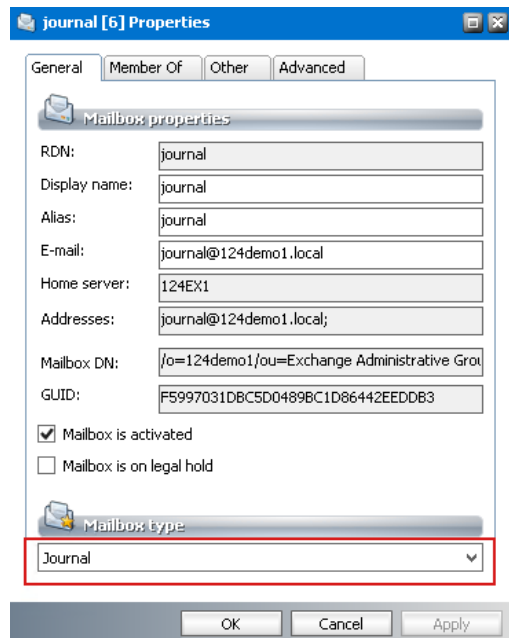
- Enter the user name of another user who has the **Auditor access** permission.
- Click **sign in** again.
- If the two-user authentication succeeds, the Metalogix Archive Manager workspace appears.
- From the top bar, click **archive** to open the archive view.
- Click the **Exchange** tab.
- Expand the **Mailboxes** node and select a journal to view its contents.



NOTE: If you have added a journal mailbox but cannot see its contents, check the **Mailbox type** property of the mailbox.

To specify a journal type mailbox follow the steps below:

1. Select the journal mailbox, and right-click to open the context menu
2. From the context menu select **Properties** to open the Properties window.
3. In the **General** tab, locate the **Mailbox type** property.
4. Set this value to **Journal** by selecting the value from the dropdown.
5. Click **OK** to confirm the change and return to the mailbox.



Profile

The **Profile** page helps you set the display preferences of logged in users.

In this topic:

- [Steps to open the Profile page](#)
- [Steps to set global defaults](#)
- [Steps to customize the profile](#)

PROFILE HOMEPAGE

- [Homepage](#)

PROFILE SETTINGS

- [Style settings](#)
- [Tasks settings](#)
- [Search settings](#)
- [Treeview settings](#)
- [Grid settings](#)
- [Exchange settings](#)
- [Audit settings](#)

Steps to open the Profile page

1. Log in to ArchiveWeb.
2. Click your username from the top-right corner.
3. Select **Manage settings** from the dropdown.
4. Click **Profile** from the local menu bar and click **Settings**.

Steps to set global defaults

To create a default profile:

When the administrator or super-user changes the default settings and Home page choices the administrator or super-user must click **Set as default** at the bottom-right of the page. These settings will be updated in the database as serves as the most current default settings.

To set a default profile for all users:

When a default profile exists, click **Set default values for all users** at the bottom- right of the page. By clicking this button all user profiles stored in the database will be replaced by the latest

default settings. For users who do not have a stored profile, the latest default profile will be used. Personalized shared mailboxes and tags stored in the user's profile will not be replaced.

Steps to customize the profile

To customize a personal profile:

When a user makes changes to the settings or Home page tabs, the user must click **Apply changes** at the bottom-right of the page, to save the customized profile in the database.

To reset a profile:

The user can click **Reset** at the bottom-right of the page, to replace their profile with the latest default profile from the database. Personalized shared mailboxes and tags stored in user's profile will not be replaced.

Home Page

Under the Home Page node select which page should be displayed after you log in to ArchiveWeb.

Style settings

STYLE

Language:* ▼
* Please re-login for the changes to take effect.

Date/Time format: ▼

Maximum preview size [MB]:

- **Language** - select the language for the application. The default language depends on the Windows local setting of the Archive Manager server. If you change this setting, you must log out and log in again.
- **Date/Time format** - select your preferred date and time format. The default value depends on regional settings of your computer and the language selected in the Profile. When profile language is changed, date/time format is changed accordingly
- **Maximum preview size [MB]** - sets maximum file size that can be opened in a preview-pane. Displaying large item (with size more than 20MB) can cause out-of-memory exception. Default value is 20 MB.

Tasks settings

TASKS

Automatic refresh interval (in seconds):

Delete completed task: ☐

- **Automatic refresh interval** (in seconds) - determines how often the *Tasks* list will be refreshed. Setting small intervals may cause performance issues. The default interval is 10 seconds.
- **Delete completed task** - switch on this option to automatically delete completed task which do not return a value like database tasks such as *Add/Remove Tag*, *Set/Unset legal hold flag*, *Mark for deletion* and *Extend retention time*. If the option is switched off, all completed tasks will be listed.

Search settings

SEARCH

Show search field in header: ☒

Remember last mailbox / server selection: ☒

Maximum number of search results:

Keyword: ☒ Exact phrase
☐ Starts with *, e.g. *test
☐ Ends with *, e.g. test*
☐ Enclosed in *, e.g. *test*

Match highlight:* ☐

* This function is available only for Exchange

Match highlight color:

Keyword search behavior: ☐ Search only in my mailbox
☒ Search in all accessible mailboxes

Set default search scope: ☒ Exchange
☒ Files

- **Show search field in header** - switch on this option to display the keyword search field in the page header. Switch off this option to hide the keyword search field in the page header. The Administrator can permanently hide the keyword search in the page header by adding the `ShowTopSearchPanel` key in the **Web.config** file. The default folder is `C:\Program Files (x86)\Metalogix\ArchiveWeb`.

```
<appSettings>
...
...
<add key="ShowTopSearchPanel" value="false"/>
```

</appSettings>

When the key value is set to false, the **Show search field in header** setting will not be available in the **Profile** page and users will not be able to display the keyword search field.

- **Remember last mailbox / server selection** - when *Metalogix Archive Manager for Exchange* is installed and this option is switch on, all mailboxes that were selected in the previous search operation are selected by default in *Search > Mailboxes* for subsequent search operations as long as the user has permissions to search those mailboxes. When this option is switched off, the user must select the mailboxes before a search operation. Similarly, when *Metalogix Archive Manager for Exchange* is installed and this option is switch on, all servers that were selected in the previous search operation are selected by default in *Search > Servers* for subsequent search operations as long as the user has permissions to search those servers. When this option is switched off, the user must select the servers before a search operation.
- **Maximum number of search results** - determines the maximum number of search results are returned from a search.
- **Keyword** - choose a wildcard format to use with the keyword search.
 - **Exact phrase** - no wildcards are added. The user can add a wildcard manually if needed.
 - **Starts with *** - A wildcard is added at the beginning of a keyword e.g. *sunshine
 - **Ends with *** - A wildcard is added at the end of a keyword e.g. sunshine*
 - **Enclosed in *** - A wildcard is added at the beginning and end of a keyword e.g. *sunshine*
- **Match highlight** - switch on this option to highlight the search phrase in the search results. Available only for *Metalogix Archive Manager for Exchange*.
- **Match highlight color** - color picker to choose a color for the highlight.
- **Keyword search behavior** - sets the default **Search scope** for keyword search setting in the *Search* tab only for *Metalogix Archive Manager for Exchange*. Choose from the following options:
 - **Search only in my mailbox** - by default only the logged on user's mailbox is pre-selected for a keyword search operation.
 - **Search in all accessible mailboxes** - by default all accessible mailboxes are pre-selected for a keyword search operation.
- **Set default search scope** - Choose the default search scope for keyword search.
 - **Exchange** - allows you to search in archived emails. Available if *Metalogix Archive Manager for Exchange* is installed.
 - **Files** - allows you to search in archived files. Available if *Metalogix Archive Manager for Files* is installed.

Treeview settings

TREEVIEW

Maximum text length:

Maximum text length - the Treeview's node text will be trimmed to the number of characters specified.

Grid settings

GRID

Paging:

- ☐ Endless paging
☒ Show paging

Journal highlight color:

Items per page:

- **Paging** - select **Endless paging** to display all items on one page. Select **Show paging** to limit the number of items on one page.
- **Journal highlight color** - choose a color from the color picker control to highlight the journal items.
- **Items per page** - If **Show paging** is selected, set the number of items to be displayed per page. This number applies to the **full grid view**.

Exchange settings

EXCHANGE

Columns:

Archive:

Search:

Show inactive mailboxes:



Use grid view:

- ☒ Simple
☐ Full

- **Columns** - sets the columns and the order that they are displayed in a list.
 - **Archive** - These column headers are used in the Archive page: *Select All, From, To, Subject, Received, Retention, Attachment, Locked, Tagged, Commented*
 - **Search** - These column headers are used in the Search results page: *Select All, From, To, Subject, Folder, Received, Version, Attachment, Locked, Tagged, Commented*
- **Show inactive mailboxes** - switch on this option to display inactive mailboxes in Archive and Search views. The Administrator can override this setting by `ShowNotActiveMailbox` key in

the **Web.config** file. The default folder is C:\Program Files (x86)\Metalogix\ArchiveWeb.

```
<appSettings>
    ...
    <add key="ShowNotActiveMailbox" value="true"/>
</appSettings>
```

When the key value is set to true, all users will have permission to show inactive mailboxes.

- **Use grid view** - allows users to set the list view type.
 - **Simple** - (default grid type) Select this option so that list operations such as custom filters, sorting and ordering are performed on items currently displayed in the list as defined by the **Items per page** option in the *Grid* settings or in the table itself (see the [List view conventions](#) section). Using **Simple** grid dramatically improves the list performance especially when working with a large number of items. **Simple** grid can be used only for *Archive* views.
 - **Full** - Select this option so that list operations such as custom filters, sorting and ordering can be performed on the entire data set of the list irrespective of limits defined by the **Items per page** option in the *Grid* settings. This option is not recommended for huge data sets. **Full** grid can be used in Auditing and Search result lists.

Audit settings

AUDIT

Columns: Report:

Use grid view: ☒ Simple ☐ Full

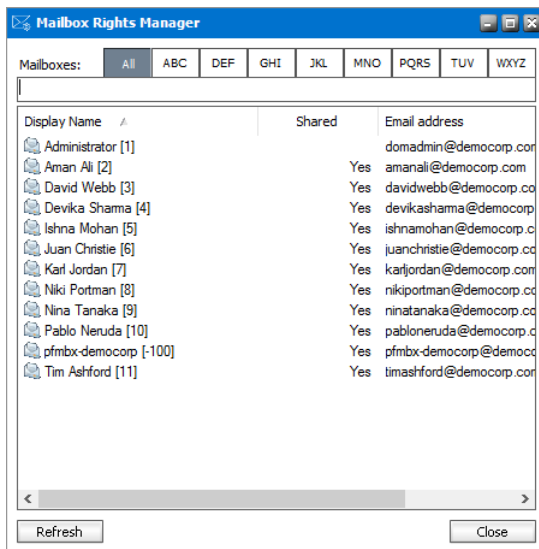
- **Columns** - sets the columns and the order that they are displayed in a list.
 - **Report** - These column headers are used in the Archive page: *Select All, Log level, Log date, Method, Computer, User, Category, Tagged*
- **Use grid view** - allows users to set the list view type.
 - **Simple** - (default grid type) Select this option so that list operations such as custom filters, sorting and ordering are performed on items currently displayed in the list as defined by the **Items per page** option in the *Grid* settings or in the table itself (see the [List view conventions](#) section). Using **Simple** grid dramatically improves the list performance especially when working with a large number of items. **Simple** grid can be used only for *Archive* views.
 - **Full** - Select this option so that list operations such as custom filters, sorting and ordering can be performed on the entire data set of the list irrespective of limits defined by the **Items per page** option in the *Grid* settings. This option is not recommended for huge data sets. **Full** grid can be used in Auditing and Search result lists.

Shared Mailboxes

This management setting is available only when Archive Manager for Exchange is installed and configured for ArchiveWeb.

Steps to set up shared mailboxes


1. Log in to the Archive Manager Administration Center (AMAC) for Exchange
2. From the **Tools** menu, click **Mailbox Rights Manager** and configure who can share the mailbox of each user.



3. Log in to ArchiveWeb.
4. From the main menu, click the username dropdown and then select **Manage settings**.
5. From the local toolbar, click **Shared Mailboxes** and verify that you can see the mailboxes of the users that have been shared with you. For example, the image below lists all the mailboxes that are shared with the logged in administrator.

Metalogix Archive Manager ArchiveWeb									
keyword search									
archive search retention report tasks Administrator									
ROLES PERMISSIONS PROFILE SHARED MAILBOXES TAGS MANAGEMENT									
Total rows selected: 11									
Clear selection									
Drag a column header here to group by that column									
<input checked="" type="checkbox"/>	LOCATION	DISPLAY NAME	ALIAS	EMAIL ADDRESS	LDAP PATH	MAILBOX DN	DOMAIN	ACCOUNT ACTIVE	ACCOUNT ON LEGAL HOLD
<input checked="" type="checkbox"/>	AMXSERVER	Aman Ali	amanali	amanali@dem...	CN=Aman Ali...	/o=Demo Cor...	democorp....	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	David Webb	davidwebb	davidwebb@d...	CN=David We...	/o=Demo Cor...	democorp....	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	Devika Sharma	devikasharma	devikasharma...	CN=Devika Sh...	/o=Demo Cor...	democorp....	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	Ishna Mohan	ishnamohan	ishnamohan@...	CN=Ishna Mo...	/o=Demo Cor...	democorp....	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	Juan Christie	juanchristie	juanchristie@d...	CN=Juan Chris...	/o=Demo Cor...	democorp....	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	Karl Jordan	karljordan	karljordan@de...	CN=Karl Jorda...	/o=Demo Cor...	democorp....	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	Niki Portman	nikiportman	nikiportman@...	CN=Niki Port...	/o=Demo Cor...	democorp....	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	Nina Tanaka	ninatanaka	ninatanaka@d...	CN=Nina Tana...	/o=Demo Cor...	democorp....	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	Pablo Neruda	pabloneruda	pabloneruda@...	CN=Pablo Ner...	/o=Demo Cor...	democorp....	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	pfmbx-democ...	pfmbx-democ...	pfmbx-democ...	CN=pfmbx-de...	/o=Demo Cor...	democorp....	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	Tim Ashford	timashford	timashford@d...	CN=Tim Ashfo...	/o=Demo Cor...	democorp....	<input checked="" type="checkbox"/>	<input type="checkbox"/>

6. By default all mailboxes are selected. When there are a large number of mailboxes that are shared, you can select only those mailboxes that you want to see in other sections of ArchiveWeb. You can use the column filters to search for mailboxes. This makes it easier to manage mailboxes in other sections of ArchiveWeb as shown below:

- In the Archive > Exchange > Navigation panel. Click the search filter  to specify a keyword.

Metalogix Archive Manager ArchiveWeb
keyword search

EXCHANGE

Mailboxes
Aman Ali [AMXSERVER]
David Webb [AMXSERVER]
Devika Sharma [AMXSERVER]
Ishna Mohan [AMXSERVER]
Juan Christie [AMXSERVER]
Karl Jordan [AMXSERVER]
Niki Portman [AMXSERVER]
Nina Tanaka [AMXSERVER]
Pablo Neruda [AMXSERVER]
Tim Ashford [AMXSERVER]
Public Folders
pfmbx-democorp [AMXSERVER]
Accounts-News
Conference
Tags +

INBOX

archived shortcut lost tagged locked for dele


Result count: 21 Total rows selected: 0

Select all items in folder

Drag a column header here to group by that column

<input type="checkbox"/>	FROM	TO
<input type="checkbox"/>	juanchristie@democorp....	davidwebb@democorp....
<input type="checkbox"/>	timashford@democorp....	davidwebb@democorp....
<input type="checkbox"/>	pabloneruda@democorp....	davidwebb@democorp....
<input type="checkbox"/>	ninatanaka@democorp....	davidwebb@democorp....
<input type="checkbox"/>	nikiportman@democorp....	davidwebb@democorp....
<input type="checkbox"/>	karljordan@democorp.c...	davidwebb@democorp....
<input type="checkbox"/>	juanchristie@democorp....	davidwebb@democorp....
<input type="checkbox"/>	ishnamohan@democorp....	davidwebb@democorp....
<input type="checkbox"/>	devikasharma@democo...	davidwebb@democorp....

First Prev Page: 1 of 2 Next Last

- In the Search > Mailboxes > List view. Enter a search criteria for any of the columns and click the search filter  to select a search operation. You can set search criteria for multiple

columns.

The screenshot shows the Metalogix Archive Manager ArchiveWeb interface. The top navigation bar includes the logo, 'Archive Manager ArchiveWeb', and a 'keyword search' input field. Below the navigation bar are tabs for 'SEARCH', 'HISTORY', and 'TEMPLATES'. The left sidebar contains 'CRITERIA', 'MAILBOXES', and 'DOCUMENT TAGS'. The main content area displays a table of email items. Above the table, it says 'Total rows selected: 12' and 'Clear selection'. Below this, it says 'Drag a column header here to group by that column'. The table has columns: 'LOCATION', 'DISPLAY NAME', 'ALIAS', and 'EMAIL ADDRESS'. Each row has a checkbox in the first column. The rows are as follows:

<input checked="" type="checkbox"/>	LOCATION	DISPLAY NAME	ALIAS	EMAIL ADDRESS
<input checked="" type="checkbox"/>	AMXSERVER	Administrator	domadmin	domadmin@d...
<input checked="" type="checkbox"/>	AMXSERVER	Aman Ali	amanali	amanali@dem...
<input checked="" type="checkbox"/>	AMXSERVER	David Webb	davidwebb	davidwebb@d...
<input checked="" type="checkbox"/>	AMXSERVER	Devika Sharma	devikasharma	devikasharma...
<input checked="" type="checkbox"/>	AMXSERVER	Ishna Mohan	ishnamohan	ishnamohan@...
<input checked="" type="checkbox"/>	AMXSERVER	Juan Christie	juanchristie	juanchristie@d...
<input checked="" type="checkbox"/>	AMXSERVER	Karl Jordan	karljordan	karljordan@de...
<input checked="" type="checkbox"/>	AMXSERVER	Niki Portman	nikiporntman	nikiporntman@...
<input checked="" type="checkbox"/>	AMXSERVER	Nina Tanaka	ninatanaka	ninatanaka@d...
<input checked="" type="checkbox"/>	AMXSERVER	Pablo Neruda	pabloneruda	pabloneruda@...
<input checked="" type="checkbox"/>	AMXSERVER	pfmbx-democ...	pfmbx-democ...	pfmbx-democ...
<input checked="" type="checkbox"/>	AMXSERVER	Tim Ashford	timashford	timashford@d...

Tags

Tags are used to categorize your archived items. You can create as many categories as you want, assign them colors, and then apply them to your archived items. This make it easy to search through your tagged items and distinguish e.g. important emails, documents related a particular project, etc.

Tags are centrally managed in the **Manage Settings > Tags** tab.

In this topic:

- [Steps to create a tag](#)
- [Steps to edit a tag](#)
- [Steps to delete a tag](#)
- [Steps to add tags to items](#)

Steps to create a tab

Tags can be created in several ways.

Create a tab from the Tags tab

1. Log in to ArchiveWeb. Then click your user name and select **Manage Settings**.

The screenshot shows a dialog box titled "ADD NEW TAG" with a close button (X) in the top right corner. Inside the dialog, there are three labeled input fields: "Name" with a text box, "Color" with a dropdown arrow, and "Apply for" with a dropdown menu showing "Global". At the bottom of the dialog are two buttons: "OK" and "Cancel".

4. Click **OK** to save the tag.

Steps to edit a tag

1. Click your user name and select **Manage Settings > Tags**.
2. Click **Edit** for the tag that you want to change.
3. When you are done with your changes, click **Update** to save your changes.

Steps to delete a tag

4. Click your user name and select **Manage Settings > Tags**.
5. Click **Delete** for the tag that you want to remove.
6. Click **Yes** in the confirmation dialog.

Steps to add and remove tags from items

Tags can be added to:

- emails - if the tag is applicable to Global or Exchange archive
- documents - if the tag is applicable to Global or File archive
- auditing items - if the tag is applicable to Global or Audit

1. Locate the item under Archive/Exchange or Archive/Files or Report/Auditing tab and select it.
2. Open the **More actions** link (MENU) from the right upper corner in the preview pane.
3. Click **Add tag(s)**.
4. In the pop-up window select the tag(s) which you want to add to the item and click **OK**. Once the tag has been added to the items, it will be visible in the list view and preview. A tag can be removed from the preview by click X or from the MENU by clicking the **Remove tag** command.

Management

Management section constitutes centralized dashboard where user with appropriate permissions can manage specific configuration settings in the following sections:

- File Management

Adding, editing and removing of Archive Manager for Files servers which together establish the file archive system. Additionally, with Scheduler capabilities, Archive Manager for Files jobs are easily managed in the same way as on the Scheduler tab of the Enterprise Manager (Archive Manager for Files).

- Search Management

Registering and managing search servers in the environment.

Search Management

Search Management section is displayed only if appropriate permission is set for the user. This section allows managing of Search servers installed in the environment. Specifying search servers on this tab is prerequisite of search functionality. With no search server defined, search is not available.

After clicking on the **Search servers** menu, the available Search servers will be listed in the main pane.

NOTE: If web.config file contains information about Search server(s) (this is applicable if upgrading from previous versions of ArchiveWeb) the list will be automatically populated.

By clicking the **Delete** option the respective Search server will be removed, i.e. it will not be used for Searches.

To add a new Search server click **New** option in the list header. It will add a new row to the list where you can specify the Search server properties.

NOTE: Avoid using *localhost* as Server Name.

By clicking the **Edit** option next to the given server, you can change server properties. The **Search Scope** marks for which Archive Manager the given search server has been installed (Archive Manager for Files/Exchange).

For Location - this property is applicable only for Archive Manager for Exchange search servers. For a Search server you can specify a location which the respective Search server "covers" by selecting a location from a "FOR LOCATION" dropdown. This dropdown lists all locations defined in Archive Manager for Exchange in a location where the logged in user has active mailbox. (For more information on locations see the *Archive Manager for Exchange Administration Guide*.)

Provided there are more Archive Manager for Exchange locations in the environment and each has its own search server, the given search servers must be listed with correct location.



NOTE: If there are more locations but only one search server for locations, leave the **For Location** property blank.

The screenshot shows the Metalogix Archive Manager ArchiveWeb interface. The top navigation bar includes 'Metalogix', 'Archive Manager', 'ArchiveWeb', a 'keyword search' input field, and links for 'archive', 'search', 'retention', 'report', 'tasks', and 'Administrator'. Below this is a sub-navigation bar with 'ROLES', 'PERMISSIONS', 'PROFILE', 'SHARED MAILBOXES', 'TAGS', and 'MANAGEMENT' (which is selected). On the left, a sidebar lists 'FILE MANAGEMENT', 'ARCHIVE SERVERS', 'SCHEDULER', 'SEARCH MANAGEMENT', and 'SEARCH SERVERS'. The main content area shows a table for managing search servers. Above the table is a prompt: 'Drag a column header here to group by that column'. The table has columns: 'SERVER', 'PROTOCOL', 'PORT', 'SEARCH SCOPE', and 'FOR LOCATION'. There are two rows of data, both with 'amxserver' as the server name and 'TCP' as the protocol. The first row has port '8228' and 'EXCHANGE' as the search scope. The second row has port '8228' and 'FILES' as the search scope. Each row has 'Edit' and 'Delete' links. A 'New' link is also present at the top left of the table area.

SERVER	PROTOCOL	PORT	SEARCH SCOPE	FOR LOCATION
amxserver	TCP	8228	EXCHANGE	
amxserver	TCP	8228	FILES	

Federated Search

If you're using more locations, you can setup a Search service for each location. Each Search service will index items on its location.

To setup Federated search (search over more search servers) in ArchiveWeb you have to modify the Search servers ([Search Management](#)) by specifying "FOR LOCATION" value.

Federated search allows you to collect results from more search servers in one search request. You can perform federated search over all available (according to permissions) search areas:

- Exchange
- Files
- Common

ArchiveWeb Interface and conventions

After browsing the ArchiveWeb URL (<http://<ArchiveWebServerName>/archiveweb>), the Login window gets displayed. Users are asked to enter their name (or “domain name\user name” or “email address”) and password. Email address should be:

- Office365 email address
- Active Directory Domain email address in format <name>@domain.com.

Please note: johnSmith@ateam.com is equivalent to ateam\johnSmith.

Default language depends on the Windows local setting of the Archive Manager server.

NOTE: When Integrated Windows authentication is turned on, the login page is skipped and the logged-in user’s credentials are used. This is set in C:\Program Files\ Common Files\ PAM\ Web \ ArchiveWeb \ Web.config where <authentication mode = “windows”>.

After logging in correctly, the ArchiveWeb application opens. The top-page main bar contains search box (keyword searching in e-mail body, attachments, file content) and tabs – archive, search, report – representing the activated features of Archive Manager. Once you click one, the grey sub-bar under the main pane displays additional options.

Further, in the right upper corner you may see the logged on user. Click it to unfold the dropdown menu offering the following options:

- Manage settings option provides access to further settings based on user permissions:

- Log out option is to be used when logging off

After clicking Manage Settings, the following menu options appear on the displayed menu bar:

The Roles option is available if the user has necessary permissions. Under this option you can manage user/ArchiveWeb roles assignment based on roles (see the “Roles” section).

The Permissions option is available if the user has necessary permissions. Under this option you can manage user/ArchiveWeb roles assignment based on users (see the “Permissions” section).

The Profile option allows you to adjust ArchiveWeb layout to your liking (see the “Profile Settings” section).

The Shared Mailboxes option is available only when Archive Manager for Exchange is installed and configured for ArchiveWeb.

When shared mailboxes are set for a currently logged user in Archive Manager for Exchange -> Tools -> Mailbox Rights Manager the grid will be populated and a user can select which mailbox(es) the user likes to be listed in Archive’s mailboxes tree and in searchable mailboxes.

Under the Tags option one can create tags for archive or auditing items (see the “Tags” section).

The File Management option is available if the user has necessary permissions. Under this option you can manage file servers and scheduled jobs (see the ["File Management"](#) section).

The Keyword search box in the upper part of the window was designed for fast and easy searching in archives - Archive Manager for Exchange archive as well as Archive Manager for Files archive. Enter the expression and click Enter.

NOTE: Email attachments, email bodies and file contents are searched through only if Keyword search is installed.

List view conventions

With advanced list view functionality provided with every ArchiveWeb list view you can easily search even in huge lists of items and adjust the list to your specific needs. List view functions are the same as for all ArchiveWeb lists. In the main pane you can switch between these types of items by clicking on the respective filter:

- archived - all folder archived items except items marked for deletion
- shortcut - archive items with shortcut in mailbox
- lost - archived items with no reference in mailbox/file system
- tagged - archived items with tag(s)
- locked - locked archived items
- for deletion - archived items that are marked for deletion, i.e. they will be deleted when their retention period expires (and delete job runs)

Preview (if available) of any item you click on appears below the list view. To open **More actions** menu for the item click the **More actions** link (MENU) on the right bottom below the list.

Pop-up preview feature is also available for Exchange, Files, Auditing and Search results items. When a user double-clicks anywhere in the item's line, the item opens in pop/up window full

screen mode with all functionality as in normal view, such as multi/action menu (MENU), and comments area.

The screenshot displays the Metalogix Archive Manager ArchiveWeb interface. The top navigation bar includes the Metalogix logo, 'Archive Manager ArchiveWeb', a keyword search box, and links for archive, search, retention, report, tasks, and Administrator. The left sidebar shows a tree view of mailboxes and folders, including 'Inbox' and 'Public Folders'. The main area is titled 'INBOX' and shows a list of emails. The first email is selected, and its details are shown below the list. A 'MENU' button is visible in the top right corner of the email details area, which opens a dropdown menu with various actions.

FROM	TO	SUBJECT	RECEIVED	RETENTION
<input type="checkbox"/> nikiportman@democor...	David Webb	Red at the Bone	09/11/20	
<input type="checkbox"/> karljordan@democorp.c...	David Webb	Mostly Dead Things	09/11/20	
<input type="checkbox"/> juanchristie@democorp....	David Webb	In the Dream House: A Memoir	09/11/20	

Red at the Bone

Nikiportman@democorp.com
9/11/2020 2:33:55 AM

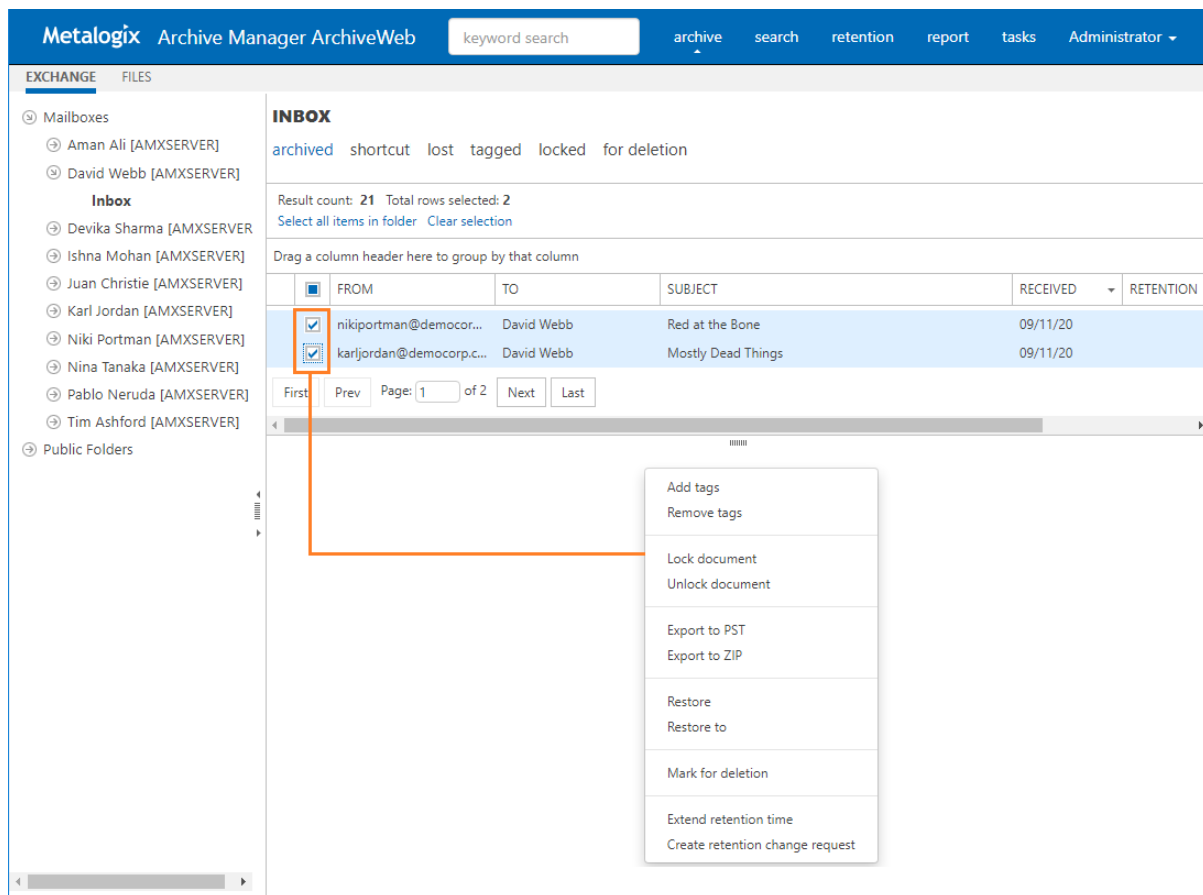
To: David Webb

- Version 1
- Tags:

MENU

- Download as MSG file
- Download as EML file
- Restore
- Restore to
- Export to ZIP
- Add tags
- Remove tags
- Lock document
- Mark for deletion
- Extend retention time
- Create retention change request

checkboxes are designed for multi-select. If MORE THAN ONE item is selected, **More actions** menu appears automatically below the list.



Batch selection/unselection of items is done by clicking the **Select all rows (Select all items in folder)/Clear selection** action links just above the list. When **Select all rows/Select all items in folder** action links are selected, operations are performed over all items in the given folder. (See more under "Simple Grid" section.)

It is also possible to change the column order by simple drag-and-drop action. Individual columns can be shown or hidden - these settings are managed in user profile after clicking **<UserName> / Manage Settings / Profile** in *Columns* section.

Further, lists can be:

- **sorted** Change the column sorting order by selecting the given column header and clicking its down/up arrow on the right (in case the arrow is not visible adjust the width of the column by dragging the line)
- **grouped** Group table data by any column. To do so, drag the column header to the bar right above the table. Generated groups can be expanded by clicking the arrows next to them. As usual, the sorting order can be changed by clicking the little arrow in the dragged column header

NOTE: In case of SIMPLE grid (see the [Profile settings](#) section) Grouping apply just for items on the current page.

Simple Grid

Simple Grid is specific type of grid available for Archive\Exchange, Archive\Files and Report\Auditing list view. It allows customization of the list view and offers some specific features for handling the list items as described further. *Simple Grid* option can be set under **<Logged-on User> / Manage settings / Profile / Settings**. When you select **Use grid view / Simple** option for the list view (e.g. for Exchange/Archive list view), the given list view will have page navigation controls and will allow user to set number of items to be displayed per page (Items per page) as shown in the screenshot below.

The screenshot displays the Metalogix Archive Manager ArchiveWeb interface. The top navigation bar includes the Metalogix logo, 'Archive Manager ArchiveWeb', a keyword search box, and tabs for 'archive', 'search', 'retention', 'report', 'tasks', and 'Administrator'. The left sidebar shows a tree view of mailboxes under 'EXCHANGE' and 'FILES', with 'Mailboxes' expanded to show a list of users including Aman Ali, David Webb, Devika Sharma, Ishna Mohan, Juan Christie, Karl Jordan, Niki Portman, Nina Tanaka, Pablo Neruda, and Tim Ashford. The main content area is titled 'INBOX' and shows a list of email items. The table has columns for 'FROM', 'TO', 'SUBJECT', 'RECEIVED', 'RETENTION', and several action icons. The first item is from 'juanchristie@democorp...' to 'davidwebb@democorp...' with the subject 'The Lion, The Witch and the Wardrobe'. Below the table, there are page navigation controls: 'First', 'Prev', 'Page: 1 of 2', 'Next', and 'Last'. In the bottom right corner, there is a dropdown menu for 'Items per page: 20'.

Asynchronous folder operations over folder are available for Simple Grid. Click the **Select all items in folder** link to perform operation over all items in a specified folder.

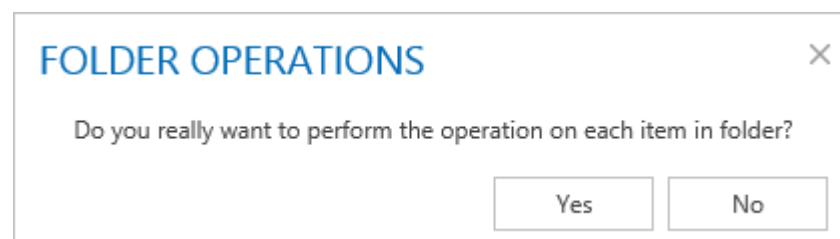
NOTE: The link does not appear on filter tabs such as “shortcut”, “lost”, “tagged”, “locked” and “for deletion”.

When a user clicks on the **Select all items in folder** link, the **Total rows selected** label will show the same number as **Result count** label shows. No item will be selected (see picture below).

Additionally, the preview pane displays folder operations menu (according to user permissions) except “Restore” functions. (“Restore” operations are not allowed as folder operations.)

Exchange	Files	Audit
<div>FOLDER OPERATIONS</div> <div><input type="checkbox"/> Include subfolders</div> <div>Add tags</div> <div>Remove tags</div> <div>Lock document</div> <div>Unlock document</div> <div>Export to PST</div> <div>Export to ZIP</div> <div>Mark for deletion</div> <div>Extend retention time</div> <div>Create retention change request</div>	<div>FOLDER OPERATIONS</div> <div><input type="checkbox"/> Include subfolders</div> <div>Add tags</div> <div>Remove tags</div> <div>Lock document</div> <div>Unlock document</div> <div>Export to ZIP</div> <div>Mark for deletion</div> <div>Extend retention time</div> <div>Create retention change request</div>	<div>FOLDER OPERATIONS</div> <div>Add tags</div> <div>Remove tags</div> <div>Export to XLS</div>

By selecting any operation from “FOLDER OPERATIONS” action menu, a confirmation dialog appears:



Only when a user confirms this dialog the operation will be added to the *Task list* queue. The *Task list* is regularly checked for new tasks. When task arrives and no other is running, the given task will be run. Otherwise the task will wait in a queue.

NOTE: Only one task can be performed at a time.

Archive

This tab is displayed in ArchiveWeb navigation pane if Archive Manager for Exchange is installed in the environment. Under this tab you can handle emails archived by Archive Manager for Exchange. The Archive Manager archive is accessible even if the Exchange server is down. User can browse through emails, search in them, restore lost items etc. After clicking the **Archive** from the main bar and then **Exchange** from the grey sub-bar the Exchange Archive menu is unfolded on the left. It offers access to

- Mailboxes
- Public Folders

In our example we have logged in as an Administrator. Therefore, under the **Mailboxes** node you may see the **Administrator** folder. Providing that the administrator has rights to view other users' mailboxes; these mailboxes can be listed under the **Mailboxes** node.

Unfolding the **Administrator** node displays all directories where emails have been archived (i.e. emails residing in these directories have been archived with Archive Manager for Exchange and are now placed in the archive).

The screenshot shows the Metalogix Archive Manager ArchiveWeb interface. The top navigation bar includes 'Metalogix', 'Archive Manager ArchiveWeb', a 'keyword search' box, and tabs for 'archive', 'search', 'retention', 'report', 'tasks', and 'Administrator'. The left sidebar shows the 'EXCHANGE' tab selected, with a tree view containing 'Mailboxes' (expanded) and 'Public Folders'. Under 'Mailboxes', several user folders are listed, including 'Aman Ali [AMXSERVER]', 'David Webb [AMXSERVER]', 'Devika Sharma [AMXSERVER]', 'Ishna Mohan [AMXSERVER]', 'Juan Christie [AMXSERVER]', 'Karl Jordan [AMXSERVER]', 'Niki Portman [AMXSERVER]', 'Nina Tanaka [AMXSERVER]', 'Pablo Neruda [AMXSERVER]', and 'Tim Ashford [AMXSERVER]'. The 'Inbox' folder is selected under 'Pablo Neruda'. The main pane displays an email list with columns: FROM, TO, SUBJECT, RECEIVED, RETENTION, and icons for actions. The email 'The Topeka School' is selected. Below the list, the email content is displayed, showing the subject 'The Topeka School', the sender 'Pabloneruda@democorp.com', the date '9/11/2020 2:33:57 AM', and the recipient 'To: davidwebb@democorp.com'. The email body text is 'In this ambitious, formidable novel, one of the very best of the Trump era thus far, Lerner asks: how does one raise a good son? When high school senior Adam Gordon'.

NOTE: Not all **Exchange** tab functions may be available for the logged-on user. The functions must be allowed for the user. For more information see the **Roles** and **Permissions** sections.

Mailboxes node

The **Mailboxes** node can be expanded to view your mailbox sub-nodes. You can also see mailboxes of other users if you have been granted access rights in the Archive Manager Administration Center.


You can expand each mailbox to access the folders in the mailbox that contain archived emails. The content of the folder selected in the left pane is displayed in the main pane of the window. The list can be filtered by categories as listed above the list view:

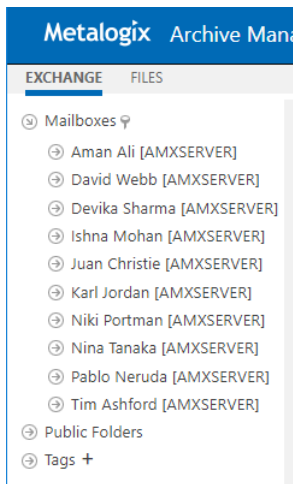
- **archived** – all folder archived items except items marked for deletion
- **shortcut** – archived items with shortcuts in the mailbox are visible
- **lost** – items that were archived but later deleted from the Exchange server are visible; these LOST ITEMS are not accessible in the user mailbox any more
- **tagged** – items marked with any tag are visible
- **locked** – items that were locked are visible
- **for deletion** – items that were marked for deletion are visible because they are still in the archive and may be also visible in the mailbox as usual. When their retention period elapses, they will be deleted (see “Mark for deletion” option in the [More actions](#) topic)

The screenshot shows the Metalogix Archive Manager interface. The top navigation bar includes the Metalogix logo, 'Archive Manager', a search bar, and links for 'archive', 'search', 'tasks', and 'user001'. The left sidebar shows the 'EXCHANGE' section with 'MAILBOXES' expanded, listing various mailboxes and folders. The main pane displays the 'INBOX' for the 'for deletion' category. It includes a table with columns: FROM, TO, SUBJECT, RECEIVED, and RETENTION. The table lists three email items. The second item is selected, and its details are shown in the bottom pane, including the subject 'paying no attention to the varying quality of the pasturage in different', the sender 'User001', and the date '3/29/2017 3:07:38 PM'.

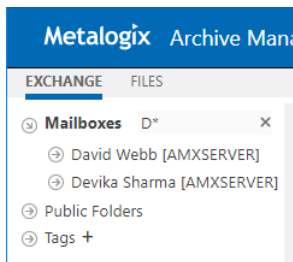
FROM	TO	SUBJECT	RECEIVED	RETENTION
Administrator	user001; user002	t01	05/22/19	3
user001	user001	paying no attention to the varying quality of the pastura...	03/29/17	6
user001	user001	"I commanded a squadron," replied Reprin.	03/29/17	3

Filtering the Mailboxes node

1. When you have access rights to see a large number of mailboxes, you can use the mailbox filter to search for a subset of mailboxes as described below:
2. Click  next to the **Mailboxes** node.



3. Enter the mailbox name or use the asterisk wildcard with a partial name to filter the mailboxes (for example, enter D* to filter all mailboxes that start with "D"). The search is case sensitive and the server name enclosed in square brackets is not included in the search.
4. Click **Enter** on your keyboard to get the filtered subset of mailboxes.




5. Click **X** to clear the filter.

For more list filtering options see the next section.

List view

With advanced list view functionality provided with every ArchiveWeb list view you can easily search even in huge lists of emails and adjust the list to your specific needs. A list can be:

- sorted by any column – click the little arrow in the column header
- grouped by any column – drag the column to the bar just above the list
- filtered – click  to create/modify the filter

For more details see [List view conventions](#)

The following information are included directly in the list:

- From column – sender of the message
- To column - recipient(s) of the message
- Subject - email subject
- Received - receive date
- Retention - archive retention (in months)

- Attachment status (📎) – checked if email contains attachment(s)
- Lock status (🔒) – yellow lock icon if the user locked the email in their own mailbox; grey lock icon if the user locked the email in some shared mailbox
- Tagged status (🏷️) – checked if the email is tagged
- Commented status (💬) – checked if there are comments associated with the email

List columns can be managed (show/hide) in the *Columns* section of the user profile (click <UserName> / Manage settings / Profile / Settings).

When you select the email in the list, its properties (importance, versioning, attachments) and email body are displayed under the list view in the preview pane. Preview is available only for some file types, e.g. for. By clicking the attachments, they can be opened or downloaded.

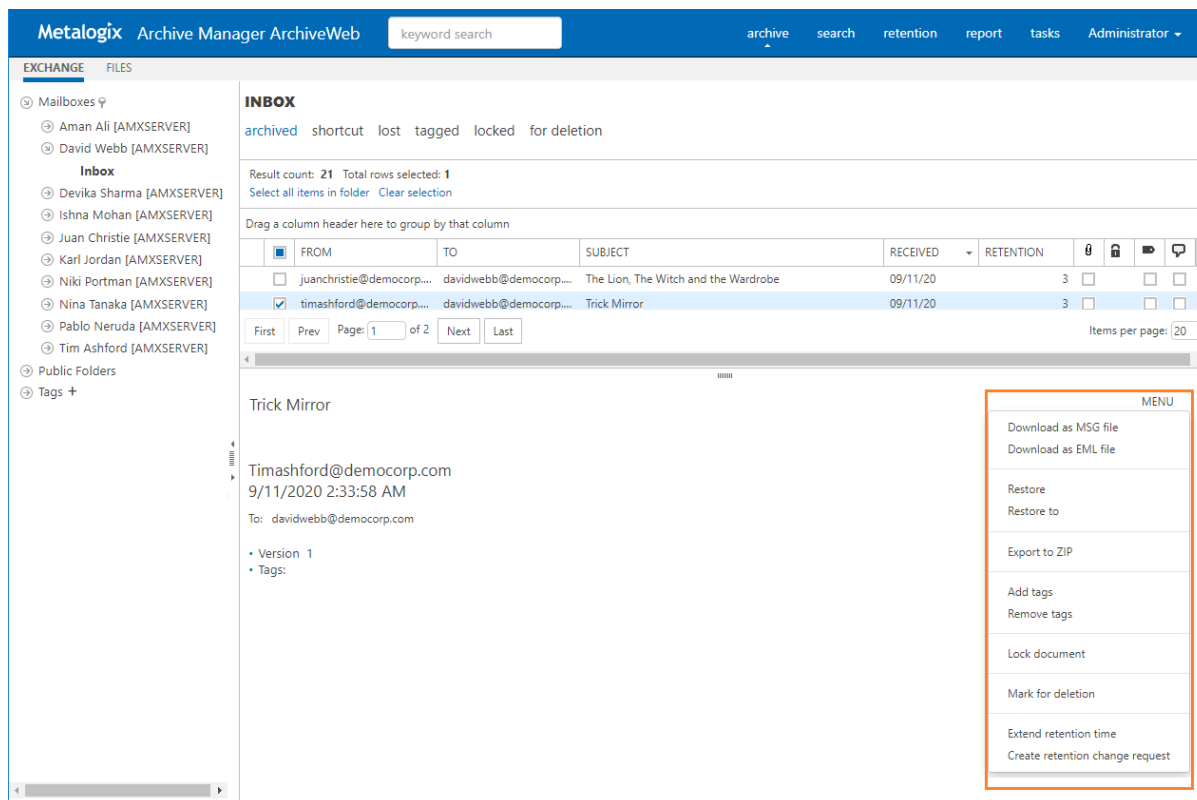
In the **Preview** pane, it is possible to add comments to emails. Simply scroll down in the **Preview** pane. Click plus sign (+) next to the **Comments** heading. Enter a note in the provided text box and click **Yes**. The comment with creation details is displayed under the **Comments** heading. Should the number next to the heading indicate some comments but none is visible, click the show/hide double-arrow (↕) to the right (see the screenshot below). The comments will be displayed.

The screenshot displays the Metalogix Archive Manager ArchiveWeb interface. The top navigation bar includes 'archive', 'search', 'retention', 'report', 'tasks', and 'Administrator'. The left sidebar shows a tree view with 'EXCHANGE' and 'FILES' sections, including 'Mailboxes' and 'Inbox' for various users like Aman Ali, David Webb, Devika Sharma, Ishna Mohan, Juan Christie, Karl Jordan, Niki Portman, Nina Tanaka, Pablo Neruda, and Tim Ashford. The main area is titled 'INBOX' and shows a list of emails. The selected email is from 'timashford@democorp.com' to 'davidwebb@democorp.com' with the subject 'Trick Mirror', received on 09/11/20. The preview pane shows the email body, which includes a quote from 'The New Yorker' and a signature 'Regards, Tim'. At the bottom of the preview pane, there is a 'Comments' section with a plus sign and a double arrow icon to toggle visibility.

NOTE: Not all **Exchange Archive** tab functions may be available for the logged-on user. The functions must be allowed for the user. For more information see the **Roles** and **Permissions** sections.

More actions

In the preview pane the user can tag, lock or export archived items. All these and other actions are accessible through the **More actions** menu.



Some or all of the following option are available depending on your user permissions.

- **Download as MSG file** - download the selected email in MSG format (not available when multiple items are selected).
- **Download as EML file** - download the selected email in EML format (not available when multiple items are selected).
- **Restore** - restore the whole archived item to the current shortcut location in the mailbox (the item in the archive is not changed in any way).
- **Restore to** - restore the whole archived item to any folder accessible in your ArchiveWeb, i.e. to any folder where something has been already archived.

i **NOTE:** In case of lost items the **Restore** action restores item to its original location. **Restore to** restores item to specified location and both make it accessible for the user in the mailbox. The **Restore to** functionality is not applicable to Public folder items.

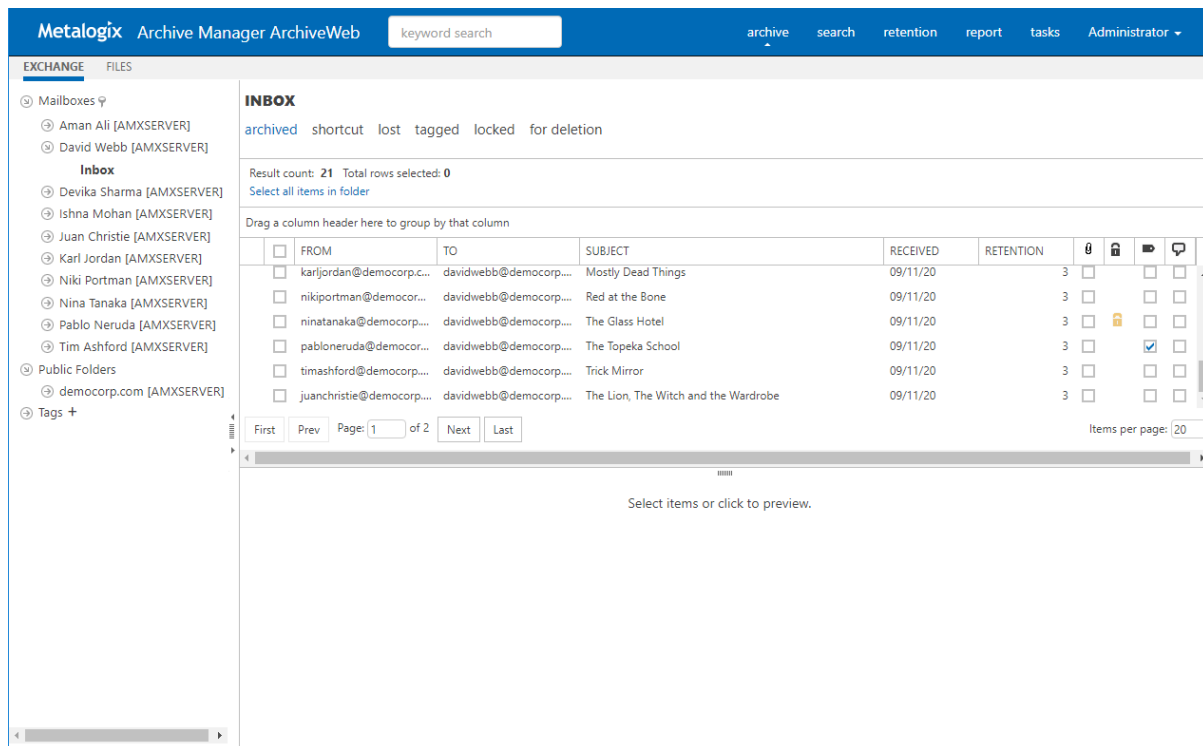
- **Export to ZIP** - compress and export the selected email(s) and define a password for the zip file.
- **Export to PST** - available when multiple items are selected.

- **Add tags / Remove tags** - tag your items. You can use existing tags or create new ones from the pop-up dialog.
- **Lock document / Unlock document** - manage document locks (for more information see the [Legal hold – lock documents](#) topic).
- **Mark for deletion** - marks the given item(s) for deletion in the archive, i.e. when the retention time elapses, the item(s) will be completely deleted from the archive. Until then they stay unchanged. To display only items marked for deletion, click the deleted category above the list view.
- **Extend retention time** - increase the time for which the item cannot be deleted from the archive. Setting shorter retention than the actual retention is not supported. After the specified period (in months) the item can be deleted manually or by a **Delete job** if such is scheduled in the Archive Manager Administration Center. For more information about creating a retention change request see the [GDPR](#) chapter.

Legal hold – lock documents

For audit purposes found documents and emails can be locked by the user. When the item is locked, it remains in the state in which it was locked, i.e. it cannot be deleted, edited etc. simply it cannot be changed in the system.

To lock emails: Locate the emails under the **Exchange Archive** node and select them. Click the **Lock** icon in the column to open the menu.



The screenshot shows the Metalogix Archive Manager ArchiveWeb interface. The top navigation bar includes 'archive', 'search', 'retention', 'report', 'tasks', and 'Administrator'. The left sidebar shows a tree view with 'EXCHANGE' and 'FILES' sections. Under 'EXCHANGE', there are 'Mailboxes' and 'Inboxes'. The 'Inboxes' section is expanded, showing a list of mailboxes including 'Aman Ali [AMXSERVER]', 'David Webb [AMXSERVER]', 'Devika Sharma [AMXSERVER]', 'Ishna Mohan [AMXSERVER]', 'Juan Christie [AMXSERVER]', 'Karl Jordan [AMXSERVER]', 'Niki Portman [AMXSERVER]', 'Nina Tanaka [AMXSERVER]', 'Pablo Neruda [AMXSERVER]', 'Tim Ashford [AMXSERVER]', 'Public Folders', and 'democorp.com [AMXSERVER]'. The 'Inboxes' section is selected, and the 'INBOX' is displayed. The 'INBOX' section shows a list of emails with columns for 'FROM', 'TO', 'SUBJECT', 'RECEIVED', and 'RETENTION'. The 'Lock' icon is visible in the action column for each email. The bottom of the interface shows pagination controls and a message 'Select items or click to preview.'

From the dropdown menu select **Lock document**. Locked documents will be displayed with a lock icon (🔒):

- yellow lock icon – item locked by the logged on user
- grey lock icon – item locked by another user in shared folder

NOTE: Unlock documents by selecting **Unlock document** from the **More actions** menu.

NOTE: To display only locked items in the given folder, click the LOCKED tab above the list view.

Public Folders

Under the **Exchange / Public Folders** node one can find archived items from all accessible Public Folders. Unfold the node down to the public folder by clicking the arrow sign. Archived items of the selected public folder will be displayed in the main pane.

Managing and handling the Public folders items is the same as described for mailbox items (see the previous section).

Metalogix Archive Manager keyword search archive search report tasks Administrator ▾

EXCHANGE FILES

- Mailboxes ▾
- Public Folders
 - public_AW7
 - Splendid**
 - Tags +

SPLendid

archived shortcut lost tagged locked for deletion

Drag a column header here to group by that column

	FROM	SUBJECT	RECEIVED	RETENTION	0	🔒	📄	💬	📌	TAGS
<input type="checkbox"/>	Administrator	ो दुनिया के सबसे मजबूत	1/9/2015 11:0...	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Administrator	dualbesucherindividua...	1/9/2015 11:0...	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Administrator	ryone, the tutors an	1/9/2015 11:0...	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	Administrator	ь 24 в сутки – наши с	1/9/2015 11:0...	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Create Filter

Select a message to view

Search

ArchiveWeb offers two types of search capabilities:

Keyword search - this type of search uses keywords to search through archived emails and files. If you have installed *Archive Manager for Exchange* and *Archive Manager for Files* on the same server, you can use the keyword search capability to search for archived items across both products at the same time.

Advanced Search - this type of search uses an expanded set of search criteria with product-specific search capabilities. If you have installed *Archive Manager for Exchange* and *Archive Manager for Files* on the same server, you can use the advanced search to search for archived items in one product at a time.

Requirements

1. Archive Manager Search must be installed. This is installed by default during an Express installation or you can choose to install it using Advanced installation. For more information see the Metalogix Archive Manager for Exchange Advanced Installation Guide.
2. A Post-processing plugin must be configured using the *Archive Manager Configuration* tool. The plugin indexes the recipient property of emails that allows you to use the *To* field in your search criteria. For more information see [Post-processing](#).
3. Optical Character Recognition (OCR) search is an optional feature that can also be activated through the *Archive Manager Configuration* tool.
4. Requisite Roles and Permissions must be granted to users who can use the search feature.

In this chapter:

- [Keyword Search](#)
- [Advanced Search](#)
- [Search Results](#)
- [Search History](#)
- [Search Templates](#)

Keyword Search

Keyword search provides a fast and flexible search for keywords in the email body and attachments of messages in *Metalogix Archive Manager for Exchange*, and file content in for *Metalogix Archive Manager for Files*. When both products are installed, you can search for the same keyword across both products.

Prerequisites

- Archive Manager Search is installed
- The post-processing plugin is configured in the Archive Manager Configuration Tool > Post Processing > Post Processing Scopes for both *Archive server for Exchange* and *Archive server for Files* depending on the products that are installed.

Steps to use keyword search

The steps described below assume the following default settings on the [Profile](#) page of ArchiveWeb.

- **Show search field in header** is selected which displays the keyword field in the header.
- **Keyword** is set to **Exact phrase**. No wildcards are added. The user can add a wildcard manually if needed.
- **Set default search scope** is set for both **Exchange** and **Files**.

The steps are as follows:

1. Log in to ArchiveWeb.
2. Enter a word, phrase or combination of words with logical operators like AND and OR in the keyword field in the header.
3. Press the **Enter** key on your keyboard.

-or-

1. Log in to ArchiveWeb.
2. Click **Search** from the main menu. The *Search* view opens.
3. Click the **Search** tab and then click **Criteria** from the navigation pane.
4. For the **Search Scope**, select the **Exchange** checkbox.

5. Click the **Search** button at the bottom right-hand corner of the page. The search results are displayed on one or two tabs depending on whether one or both products are installed. See [Search Results](#) for more information.

- Exchange Search Results
- Files Search Results

Wildcards

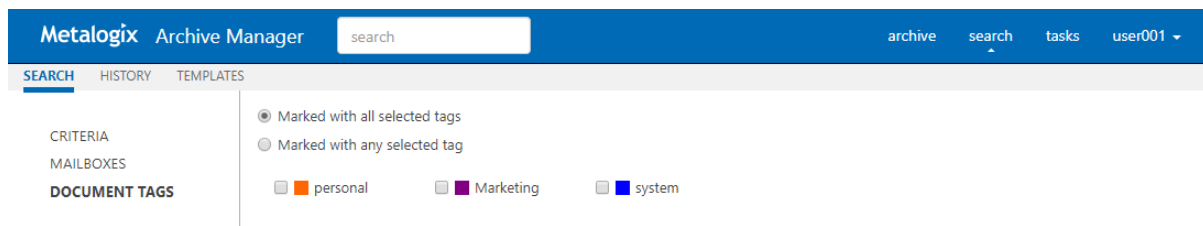
Keyword search supports wildcards as described in the table below:

Wildcard	Description	Example	SQL representation
*	A substitute for zero or more characters. You can insert wildcards before, after, or before and after a word.	*.htm	LIKE '%.htm'
?	A substitute for a single character to match	Clas?ic film.mpg	LIKE 'Clas_ic film.mpg'

Document tags

The *Document Tags* page displays the tags that you can specify in a search. See [Tags](#) for more information about setting up document tags. To search for emails that are tagged, do the following:

1. Select one or more document tags.
2. Select a search option as described below:
 - a. **Marked with all selected tags** - select this option to search emails which are tagged with *all* the selected tags.
 - b. **Marked with any selected tag** - select this option to search emails which are tagged with any of the selected tags.

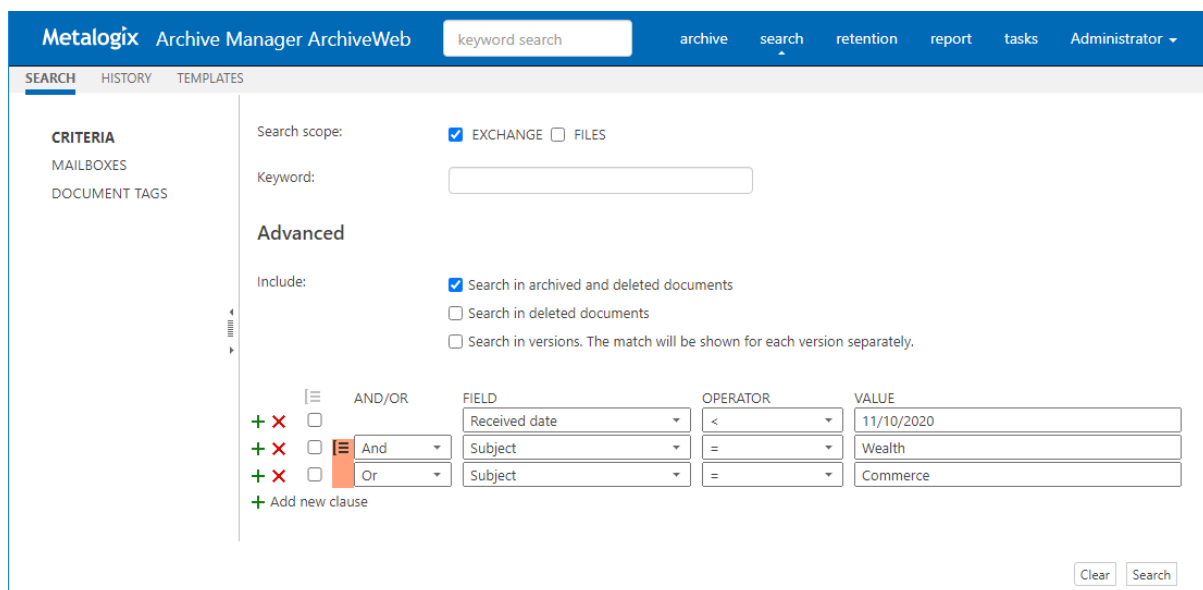


Advanced Search

Advanced search uses an expanded set of search criteria with product-specific search capabilities. Advanced search uses three parts to build the search: **Criteria**, **Mailboxes** and **Document Tags**. When all search specifications have been set, click **Search** in the bottom right-hand corner of the search view.

Criteria

The Criteria page presents the scope, context and email properties to define the search. The scope and context of the search are mandatory. If you have installed *Archive Manager for Exchange* and *Archive Manager for Files* on the same server, then advanced search can be used for only one product at a time.



Steps to search with advanced search criteria

1. Click **Search** from the main menu. The *Search* view opens.
2. Click the **Search** tab and then click **Criteria** from the navigation pane.
3. For the **Search Scope**, select the **Exchange** checkbox.
4. Ignore the **Keyword** field.




5. **Include** 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.
6. In the search *Criteria* pane, click **Add new clause**  and enter the search criteria using the fields as described below:
- a. **And/Or** - select two or more checkboxes to create a nested search phrase with the  icon as described in the example below.
 - b. **Field** - select a property for the email from the dropdown.
 - c. **Operator** - select an operator from the dropdown.
 - d. **Value** - enter a text value to search. For date fields, enter the date in the format *m/d/yyyy*.
7. You can remove a specific row by clicking the **Delete** . To reset the search criteria, click **Clear** in the bottom right corner of the window.

Example of a nested search query


Consider the following search request: *All email items that were received by David Webb before 10th November 2020 and the subject contains either the words Wealth or Commerce.*


Search criteria contains only email properties. Therefore the nested search criteria can be written as follows:

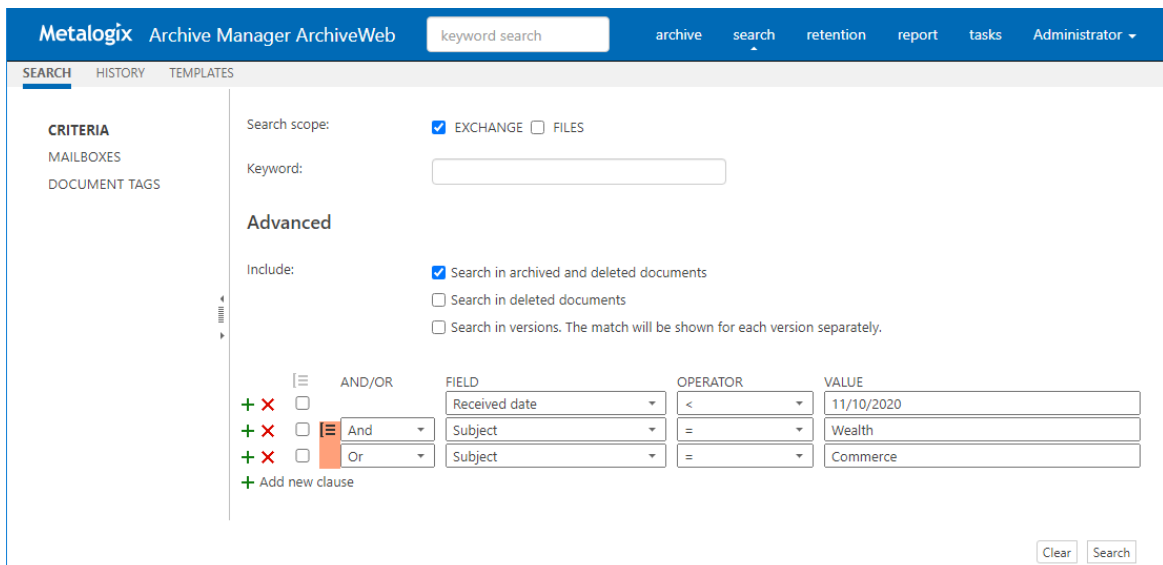
```
Received Date < 11/10/2020 AND (Subject contains Wealth OR Subject contains Commerce)
```

The context of the search query is restricted to a single mailbox called *David Webb*, but there are no restrictions to the scope since *All items* are required to be searched in the specified mailbox.

To define a nested query in the search page, follow the steps described below:

2. Click **Search** from the main menu. The *Search* view opens.
3. Click the **Search** tab.
4. In the search *Criteria* pane, click **Add new clause**  and enter the search criteria using the fields as described below:

- a. **Field:** Received Date
 - b. **Operator:** <
 - c. **Value:** 11/10/2020
5. Click **Add new clause** and enter the search criteria using the fields as described below:
 - a. **And/Or:** And
 - b. **Field:** Subject
 - c. **Operator:** Contains
 - d. **Value:** Wealth
6. Click **Add new clause** and enter the search criteria using the fields as described below:
 - a. **And/Or:** Or
 - b. **Field:** Subject
 - c. **Operator:** Contains
 - d. **Value:** Commerce
7. Since *Subject Contains Wealth Or Subject Contains Commerce* are nested criteria, select the two checkboxes where the **Field** value is *Subject*. Then click the  icon that is activated. The fields that are grouped are marked as shown on the image below:



The screenshot shows the Metalogix Archive Manager ArchiveWeb search interface. The top navigation bar includes links for archive, search, retention, report, tasks, and Administrator. The search scope is set to EXCHANGE. The keyword search box is empty. The advanced search options are expanded, showing checkboxes for searching in archived and deleted documents, deleted documents, and versions. The criteria section shows three clauses: 1. Received date < 11/10/2020, 2. Subject Contains Wealth, and 3. Subject Contains Commerce. The second and third clauses are grouped together under an 'Or' operator, which is highlighted with an orange box and a grouping icon.


Mailboxes

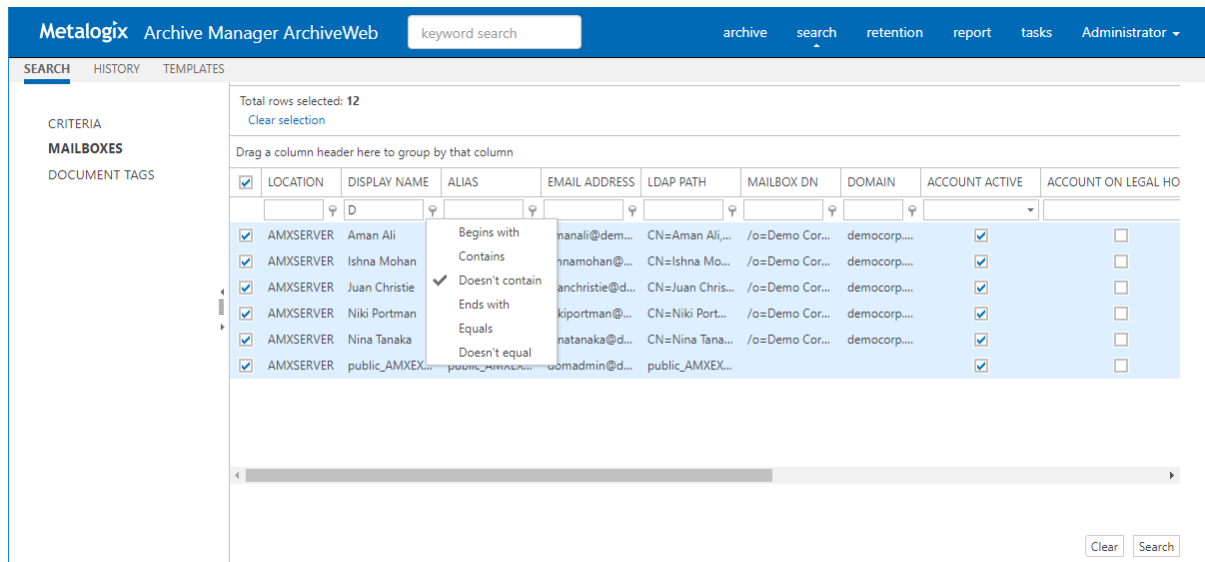
The *Mailboxes* page lists the mailboxes that you have been granted the access rights to view and search.

To search for mailboxes:

1. Below each column header is a search text box. Enter a letter or a combination of alphanumeric characters to search for terms in the column. You can enter search criteria for

multiple columns. For example, in the image below, the letter **D** has been added to the search text box below the column header *Display Name*.

2. Click the  icon to open the search operators list and select a search operator. For example, the search operator **Doesn't contain** has been selected which excludes all mailboxes that start with the letter **D** that was entered in the search text box.
3. The list will update as you enter or modify search criteria and search operators. The search settings will persist through a single session and will be reset when you log in again.



To sort mailboxes:

If there are too many mailboxes, you can sort or group the list by clicking a column header

To group mailboxes:

1. Drag a column header to the grouping bar just above the list. For example, dragging the Location column header to the grouping bar, groups the mailboxes by Location.
2. Expand each group item to view the mailboxes in that group.
3. Click the **up** or **down** icon in the group column header to sort the mailboxes in the group in ascending or descending order.
4. To remove a grouping, drag the column header back into the list. You can insert the column header at any place in the row of column headers.

Metalogix Archive Manager ArchiveWeb keyword search archive search retention report tasks Administrator

SEARCH HISTORY TEMPLATES

CRITERIA
MAILBOXES
DOCUMENT TAGS

Total rows selected: 11
Select all rows Clear selection

Drag a column header here to group by that column

<input checked="" type="checkbox"/>	LOCATION	DISPLAY NAME	ALIAS	EMAIL ADDRESS	LDAP PATH	MAILBOX DN	DOMAIN	ACCOUNT ACTIVE	ACCOUNT ON LEGAL HOLD
<input checked="" type="checkbox"/>	AMXSERVER	Administrator	domadmin	domadmin@d...	CN=domadmi...	/o=Demo Cor...	democorp...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	Aman Ali	amanali	amanali@dem...	CN=Aman Ali...	/o=Demo Cor...	democorp...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	David Webb	davidwebb	davidwebb@d...	CN=David We...	/o=Demo Cor...	democorp...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	Devika Sharma	devikasharma	devikasharma...	CN=Devika Sh...	/o=Demo Cor...	democorp...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	Ishna Mohan	ishnamohan	ishnamohan@...	CN=Ishna Mo...	/o=Demo Cor...	democorp...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	Juan Christie	juanchristie	juanchristie@d...	CN=Juan Chris...	/o=Demo Cor...	democorp...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	Karl Jordan	karljordan	karljordan@de...	CN=Karl Jorda...	/o=Demo Cor...	democorp...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	Niki Portman	nikiportman	nikiportman@...	CN=Niki Port...	/o=Demo Cor...	democorp...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	Nina Tanaka	ninatanaka	ninatanaka@d...	CN=Nina Tana...	/o=Demo Cor...	democorp...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	Pablo Neruda	pabloneruda	pabloneruda@...	CN=Pablo Ner...	/o=Demo Cor...	democorp...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	AMXSERVER	Tim Ashford	timashford	timashford@d...	CN=Tim Ashfo...	/o=Demo Cor...	democorp...	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Clear Search



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 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.

At least one mailbox must be selected to run a search. The specified mailbox selection is preserved across sessions unless the option **Remember last mailbox / server selection** in *Manage settings > Profile* is cleared.

Document tags

The *Document Tags* page displays the tags that you can specify in a search. See [Tags](#) for more information about setting up document tags. To search for emails that are tagged, do the following:

1. Select one or more document tags.
2. Select a search option as described below:
 - a. **Marked with all selected tags** - select this option to search emails which are tagged with *all* the selected tags.
 - b. **Marked with any selected tag** - select this option to search emails which are tagged with *any* of the selected tags.

Metalogix Archive Manager search archive search tasks user001

SEARCH HISTORY TEMPLATES

CRITERIA
MAILBOXES
DOCUMENT TAGS

☒ Marked with all selected tags
☐ Marked with any selected tag

☐ personal ☐ Marketing ☐ system

How to build search queries

This topic describes how to build search conditions using the keyword search and 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.

Query

Metalogix Archive Manager ArchiveWeb

keyword search

archive search retention report tasks amadmin

SEARCH HISTORY TEMPLATES

CRITERIA
MAILBOXES
DOCUMENT TAGS

Search scope: ☒ EXCHANGE

Keyword:

Advanced

Include:

☐ Search in archived and deleted documents

☐ Search in deleted documents

☐ Search in versions. The match will be shown for each version separately.

	AND/OR	FIELD	OPERATOR	VALUE
+ Add new clause				

Clear Search

Result

Metalogix

Archive Manager ArchiveWeb

keyword search

archive

search

retention

report

tasks

amadmin

SEARCH

HISTORY

TEMPLATES

EXCHANGE SEARCH RESULTS

archived

tagged

locked

Result count: 91

Total rows selected: 0

Select all rows

Edit query

Drag a column header here to group by that column

<input type="checkbox"/>	FROM	TO	SUBJECT	FOLDER	RECEIVED	VERSION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>				Contacts/Recipient Cache	07/21/21	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	amadmin	amadmin	"Who gave the report?" inquired Shcherbinin, taking the ...	Sent Items	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	amadmin	amadmin	voice addressing the publican. "What have you killed a ...	Sent Items	02/09/21	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	amadmin	amadmin	a seventy-pound weight were tied to it. He could run no ...	Sent Items	02/09/21	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	amadmin	amadmin	"Who gave the report?" inquired Shcherbinin, taking the ...	Inbox	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	amadmin	amadmin	voice addressing the publican. "What have you killed a ...	Inbox	02/09/21	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

First

Prev

Page: 1

of 5

Next

Last

Items per page: 20

Select items or click to preview.

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".

Query

Metalogix Archive Manager ArchiveWeb												
keyword search				archive	search	retention	report	tasks	amadmin			
SEARCH HISTORY TEMPLATES												
CRITERIA												
MAILBOXES												
DOCUMENT TAGS												
Search scope:												
<input checked="" type="checkbox"/> EXCHANGE												
Keyword:												
Advanced												
Include:												
<input type="checkbox"/> Search in archived and deleted documents												
<input type="checkbox"/> Search in deleted documents												
<input type="checkbox"/> Search in versions. The match will be shown for each version separately.												
AND/OR												
+ Add new clause												
FIELD				OPERATOR		VALUE						
Subject				Contains		them						
Clear Search												

Result

Metalogix Archive Manager ArchiveWeb									
keyword search				archive	search	retention	report	tasks	amadmin
SEARCH HISTORY TEMPLATES									
EXCHANGE SEARCH RESULTS									
archived tagged locked									
Result count: 4 Total rows selected: 0									
Select all rows Edit query									
Drag a column header here to group by that column									
<input type="checkbox"/>	FROM	TO	SUBJECT	FOLDER	RECEIVED	VERSION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin		French since Suvorov met them. He feared that Bonapart...	Calendar	02/09/21	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>			so jaded that at a meeting of the huntmen it was decide...	Inbox	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		amadmin@am19local	splashing with blood those near them.	Inbox	02/09/21	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>		amadmin@am19local	of them had yet seen the manifesto, but they all knew it ...	Inbox	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
First Prev Page: 1 of 1 Next Last									
Items per page: 20									
Select items or click to preview.									

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:

Query

Metalogix Archive Manager ArchiveWeb									
keyword search				archive	search	retention	report	tasks	amadmin
SEARCH HISTORY TEMPLATES									
CRITERIA									
MAILBOXES									
DOCUMENT TAGS									
Search scope: <input checked="" type="checkbox"/> EXCHANGE									
Keyword: <input type="text"/>									
Advanced									
Include: <input type="checkbox"/> Search in archived and deleted documents									
<input type="checkbox"/> Search in deleted documents									
<input type="checkbox"/> Search in versions. The match will be shown for each version separately.									
AND/OR									
+ X <input type="checkbox"/> FIELD OPERATOR VALUE									
+ X <input type="checkbox"/> Subject Contains them									
+ X <input type="checkbox"/> And From = amadmin									
+ Add new clause									
Clear Search									

Result

Metalogix

Archive Manager ArchiveWeb

keyword search

archive

search

retention

report

tasks

amadmin

SEARCH

HISTORY

TEMPLATES

EXCHANGE SEARCH RESULTS

archivedtaggedlocked

Result count: 1Total rows selected: 0

Select all rowsEdit query

Drag a column header here to group by that column

<input type="checkbox"/>	FROM	TO	SUBJECT	FOLDER	RECEIVED	VERSION	0			
<input type="checkbox"/>	amadmin		French since Suvarov met them. He feared that Bonapart...	Calendar	02/09/21	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

FirstPrevPage: 1 of 1NextLast

Items per page: 20

Select items or click to preview.

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:

Query

Metalogix

Archive Manager ArchiveWeb

keyword search

archive

search

retention

report

tasks

amadmin

SEARCH

HISTORY

TEMPLATES

CRITERIA

MAILBOXES

DOCUMENT TAGS

Search scope:

☒ EXCHANGE

Keyword:

Advanced

Include:

☐ Search in archived and deleted documents

☐ Search in deleted documents

☐ Search in versions. The match will be shown for each version separately.

AND/OR

Subject

Contains

them

From

=

amadmin

Add new clause

Clear

Search

Result

Metalogix Archive Manager ArchiveWeb									
keyword search									
archive search retention report tasks amadmin									
SEARCH HISTORY TEMPLATES									
EXCHANGE SEARCH RESULTS									
archived tagged locked									
Result count: 63 Total rows selected: 0									
Select all rows Edit query									
Drag a column header here to group by that column									
<input type="checkbox"/>	FROM	TO	SUBJECT	FOLDER	RECEIVED	VERSION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	"Who gave the report?" inquired Shcherbinin, taking the ...	Sent Items	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	voice addressing the publican. "What have you killed a ...	Sent Items	02/09/21	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	a seventy-pound weight were tied to it. He could run no ...	Sent Items	02/09/21	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	"Who gave the report?" inquired Shcherbinin, taking the ...	Inbox	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	voice addressing the publican. "What have you killed a ...	Inbox	02/09/21	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	a seventy-pound weight were tied to it. He could run no ...	Inbox	02/09/21	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
First Prev Page: 1 of 4 Next Last									
Items per page: 20									
Select items or click to preview.									

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

Metalogix Archive Manager ArchiveWeb									
keyword search									
archive search retention report tasks amadmin									
SEARCH HISTORY TEMPLATES									
CRITERIA									
MAILBOXES									
DOCUMENT TAGS									
Search scope: <input checked="" type="checkbox"/> EXCHANGE									
Keyword: <input type="text"/>									
Advanced									
Include: <input type="checkbox"/> Search in archived and deleted documents									
<input type="checkbox"/> Search in deleted documents									
<input type="checkbox"/> Search in versions. The match will be shown for each version separately.									
AND/OR									
+ <input type="checkbox"/> <input type="checkbox"/> Or									
+ <input type="checkbox"/> <input type="checkbox"/> And									
+ Add new clause									
FIELD OPERATOR VALUE									
Subject Contains them									
From = amadmin									
Has attachment = Yes									
Clear Search									

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

Metalogix Archive Manager ArchiveWeb keyword search archive search retention report tasks amadmin

SEARCH HISTORY TEMPLATES

EXCHANGE SEARCH RESULTS

archived tagged locked

Result count: **14** Total rows selected: **0**

Select all rows Edit query

Drag a column header here to group by that column

<input type="checkbox"/>	FROM	TO	SUBJECT	FOLDER	RECEIVED	VERSION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	"Who gave the report?" inquired Shcherbinin, taking the ...	Sent Items	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	"Who gave the report?" inquired Shcherbinin, taking the ...	Inbox	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	blood under his arm. "No, I am wounded and the horse i...	Sent Items	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	blood under his arm. "No, I am wounded and the horse i...	Inbox	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	not wish it. In a word, I make no promise. And I beg you ...	Sent Items	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	not wish it. In a word, I make no promise. And I beg you ...	Inbox	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

First Prev Page: 1 of 1 Next Last

Items per page: 20

Select items or click to preview.

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 is "amadmin" AND has attachment

Metalogix Archive Manager ArchiveWeb

SEARCH | HISTORY | TEMPLATES

- CRITERIA**
- MAILBOXES
- DOCUMENT TAGS

keyword search

archive
search
retention
report
tasks
amadmin

Search scope: ☒ EXCHANGE

Keyword:

Advanced

Include:

☐ Search in archived and deleted documents
☐ Search in deleted documents
☐ Search in versions. The match will be shown for each version separately.

	AND/OR	FIELD	OPERATOR	VALUE
+ X	<input type="checkbox"/>	Subject	Contains	them
+ X	<input type="checkbox"/> Or	From	=	amadmin
+ X	<input type="checkbox"/> And	Has attachment	=	Yes

+ Add new clause

Clear Search

Result: Subject contains "them" OR Sender is "amadmin" AND has attachment

Metalogix Archive Manager ArchiveWeb <input type="text" value="keyword search"/>										
archive search retention report tasks amadmin										
SEARCH HISTORY TEMPLATES										
EXCHANGE SEARCH RESULTS										
archived tagged locked										
Result count: 16 Total rows selected: 0										
Select all rows Edit query										
Drag a column header here to group by that column										
<input type="checkbox"/>	FROM	TO	SUBJECT	FOLDER	RECEIVED	VERSION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	"Who gave the report?" inquired Shcherbinin, taking the ...	Sent Items	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	"Who gave the report?" inquired Shcherbinin, taking the ...	Inbox	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	blood under his arm. "No, I am wounded and the horse i...	Sent Items	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	blood under his arm. "No, I am wounded and the horse i...	Inbox	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	not wish it. In a word, I make no promise. And I beg you ...	Sent Items	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin	amadmin	not wish it. In a word, I make no promise. And I beg you ...	Inbox	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
First Prev Page: 1 of 1 Next Last										
Items per page: 20										
Select items or click to preview.										

This query we 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: Inbox

Metalogix Archive Manager ArchiveWeb archive search retention report tasks amadmin

SEARCH HISTORY TEMPLATES

CRITERIA
MAILBOXES
DOCUMENT TAGS

Search scope: ☒ EXCHANGE

Keyword:

Advanced

Include: ☐ Search in archived and deleted documents
☐ Search in deleted documents
☐ Search in versions. The match will be shown for each version separately.

	AND/OR	FIELD	OPERATOR	VALUE
+ X		Subject	Contains	them
+ X	And	From	=	amadmin
+ X	Or	Has attachment	=	Yes
+ X	And	Folder path	=	Inbox

+ Add new clause

Clear Search

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

Metalogix Archive Manager ArchiveWeb archive search retention report tasks amadmin

SEARCH HISTORY TEMPLATES

EXCHANGE SEARCH RESULTS
archived tagged locked

Result count: 2 Total rows selected: 0
[Select all rows](#) [Edit query](#)

Drag a column header here to group by that column

<input type="checkbox"/>	FROM	TO	SUBJECT	FOLDER	RECEIVED	VERSION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>			so jaded that at a meeting of the huntsmen it was decide...	Inbox	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	amadmin@am19.local		of them had yet seen the manifesto, but they all knew it ...	Inbox	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

First Prev Page: 1 of 1 Next Last

Items per page: 20

Select items or click to preview.

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: Inbox

The screenshot shows the Metalogix Archive Manager ArchiveWeb search interface. The search scope is set to EXCHANGE. The keyword search field is empty. The advanced search criteria are defined as follows:

AND/OR	FIELD	OPERATOR	VALUE
<input type="checkbox"/> AND	Subject	Contains	them
<input type="checkbox"/> Or	From	=	amadmin
<input type="checkbox"/> And	Has attachment	=	Yes
<input type="checkbox"/> And	Folder path	=	Inbox

Buttons: Clear, Search

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

The screenshot shows the search results page for the query. The results are displayed in a table with the following columns: FROM, TO, SUBJECT, FOLDER, RECEIVED, VERSION, and a set of checkboxes for actions. The results are sorted by received date.

FROM	TO	SUBJECT	FOLDER	RECEIVED	VERSION	Actions
amadmin	amadmin	"Who gave the report?" inquired Shcherbinin, taking the ...	Inbox	02/09/21	1	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
amadmin	amadmin	blood under his arm. "No, I am wounded and the horse i...	Inbox	02/09/21	1	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
amadmin	amadmin	not wish it. In a word, I make no promise. And I beg you ...	Inbox	02/09/21	1	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
amadmin	amadmin	back seized him by the arm, pulled him through the wic...	Inbox	02/09/21	1	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
amadmin	amadmin	French since Suvorov met them. He feared that Bonapart...	Calendar	02/09/21	1	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
		querulousness, which generally culminated in a burst of ...	Inbox	02/09/21	1	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Page: 1 of 1. Items per page: 20

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: Inbox) AND (Sender is "amadmin" OR has attachment)

Metalogix Archive Manager ArchiveWeb

keyword search

archive search retention report tasks amadmin

SEARCH HISTORY TEMPLATES

CRITERIA

MAILBOXES

DOCUMENT TAGS

Search scope:

☒ EXCHANGE

Keyword:

Advanced

Include:

☐ Search in archived and deleted documents

☐ Search in deleted documents

☐ Search in versions. The match will be shown for each version separately.

AND/OR

+

×

☐

Or

+

×

☐

And

+

×

☐

Or

Add new clause

FIELD

OPERATOR

VALUE

Subject

Contains

them

Folder path

=

Inbox

From

=

amadmin

Has attachment

=

Yes

Clear

Search

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

Metalogix

Archive Manager ArchiveWeb

keyword search

archive search retention report tasks amadmin

SEARCH HISTORY TEMPLATES

EXCHANGE SEARCH RESULTS

archived tagged locked

Result count: 33

Total rows selected: 0

Select all rows Edit query

Drag a column header here to group by that column

FROM	TO	SUBJECT	FOLDER	RECEIVED	VERSION	0	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50	51	52	53	54	55	56	57	58	59	60	61	62	63	64	65	66	67	68	69	70	71	72	73	74	75	76	77	78	79	80	81	82	83	84	85	86	87	88	89	90	91	92	93	94	95	96	97	98	99	100	101	102	103	104	105	106	107	108	109	110	111	112	113	114	115	116	117	118	119	120	121	122	123	124	125	126	127	128	129	130	131	132	133	134	135	136	137	138	139	140	141	142	143	144	145	146	147	148	149	150	151	152	153	154	155	156	157	158	159	160	161	162	163	164	165	166	167	168	169	170	171	172	173	174	175	176	177	178	179	180	181	182	183	184	185	186	187	188	189	190	191	192	193	194	195	196	197	198	199	200	201	202	203	204	205	206	207	208	209	210	211	212	213	214	215	216	217	218	219	220	221	222	223	224	225	226	227	228	229	230	231	232	233	234	235	236	237	238	239	240	241	242	243	244	245	246	247	248	249	250	251	252	253	254	255	256	257	258	259	260	261	262	263	264	265	266	267	268	269	270	271	272	273	274	275	276	277	278	279	280	281	282	283	284	285	286	287	288	289	290	291	292	293	294	295	296	297	298	299	300	301	302	303	304	305	306	307	308	309	310	311	312	313	314	315	316	317	318	319	320	321	322	323	324	325	326	327	328	329	330	331	332	333	334	335	336	337	338	339	340	341	342	343	344	345	346	347	348	349	350	351	352	353	354	355	356	357	358	359	360	361	362	363	364	365	366	367	368	369	370	371	372	373	374	375	376	377	378	379	380	381	382	383	384	385	386	387	388	389	390	391	392	393	394	395	396	397	398	399	400	401	402	403	404	405	406	407	408	409	410	411	412	413	414	415	416	417	418	419	420	421	422	423	424	425	426	427	428	429	430	431	432	433	434	435	436	437	438	439	440	441	442	443	444	445	446	447	448	449	450	451	452	453	454	455	456	457	458	459	460	461	462	463	464	465	466	467	468	469	470	471	472	473	474	475	476	477	478	479	480	481	482	483	484	485	486	487	488	489	490	491	492	493	494	495	496	497	498	499	500	501	502	503	504	505	506	507	508	509	510	511	512	513	514	515	516	517	518	519	520	521	522	523	524	525	526	527	528	529	530	531	532	533	534	535	536	537	538	539	540	541	542	543	544	545	546	547	548	549	550	551	552	553	554	555	556	557	558	559	560	561	562	563	564	565	566	567	568	569	570	571	572	573	574	575	576	577	578	579	580	581	582	583	584	585	586	587	588	589	590	591	592	593	594	595	596	597	598	599	600	601	602	603	604	605	606	607	608	609	610	611	612	613	614	615	616	617	618	619	620	621	622	623	624	625	626	627	628	629	630	631	632	633	634	635	636	637	638	639	640	641	642	643	644	645	646	647	648	649	650	651	652	653	654	655	656	657	658	659	660	661	662	663	664	665	666	667	668	669	670	671	672	673	674	675	676	677	678	679	680	681	682	683	684	685	686	687	688	689	690	691	692	693	694	695	696	697	698	699	700	701	702	703	704	705	706	707	708	709	710	711	712	713	714	715	716	717	718	719	720	721	722	723	724	725	726	727	728	729	730	731	732	733	734	735	736	737	738	739	740	741	742	743	744	745	746	747	748	749	750	751	752	753	754	755	756	757	758	759	760	761	762	763	764	765	766	767	768	769	770	771	772	773	774	775	776	777	778	779	780	781	782	783	784	785	786	787	788	789	790	791	792	793	794	795	796	797	798	799	800	801	802	803	804	805	806	807	808	809	810	811	812	813	814	815	816	817	818	819	820	821	822	823	824	825	826	827	828	829	830	831	832	833	834	835	836	837	838	839	840	841	842	843	844	845	846	847	848	849	850	851	852	853	854	855	856	857	858	859	860	861	862	863	864	865	866	867	868	869	870	871	872	873	874	875	876	877	878	879	880	881	882	883	884	885	886	887	888	889	890	891	892	893	894	895	896	897	898	899	900	901	902	903	904	905	906	907	908	909	910	911	912	913	914	915	916	917	918	919	920	921	922	923	924	925	926	927	928	929	930	931	932	933	934	935	936	937	938	939	940	941	942	943	944	945	946	947	948	949	950	951	952	953	954	955	956	957	958	959	960	961	962	963	964	965	966	967	968	969	970	971	972	973	974	975	976	977	978	979	980	981	982	983	984	985	986	987	988	989	990	991	992	993	994	995	996	997	998	999	1000	1001	1002	1003	1004	1005	1006	1007	1008	1009	1010	1011	1012	1013	1014	1015	1016	1017	1018	1019	1020	1021	1022	1023	1024	1025	1026	1027	1028	1029	1030	1031	1032	1033	1034	1035	1036	1037	1038	1039	1040	1041	1042	1043	1044	1045	1046	1047	1048	1049	1050	1051	1052	1053	1054	1055	1056	1057	1058	1059	1060	1061	1062	1063	1064	1065	1066	1067	1068	1069	1070	1071	1072	1073	1074	1075	1076	1077	1078	1079	1080	1081	1082	1083	1084	1085	1086	1087	1088	1089	1090	1091	1092	1093	1094	1095	1096	1097	1098	1099	1100	1101	1102	1103	1104	1105	1106	1107	1108	1109	1110	1111	1112	1113	1114	1115	1116	1117	1118	1119	1120	1121	1122	1123	1124	1125	1126	1127	1128	1129	1130	1131	1132	1133	1134	1135	1136	1137	1138	1139	1140	1141	1142	1143	1144	1145	1146	1147	1148	1149	1150	1151	1152	1153	1154	1155	1156	1157	1158	1159	1160	1161	1162	1163	1164	1165	1166	1167	1168	1169	1170	1171	1172	1173	1174	1175	1176	1177	1178	1179	1180	1181	1182	1183	1184	1185	1186	1187	1188	1189	1190	1191	1192	1193	1194	1195	1196	1197	1198	1199	1200	1201	1202	1203	1204	1205	1206	1207	1208	1209	1210	1211	1212	1213	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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 has attachment

The screenshot shows the Metalogix Archive Manager ArchiveWeb search interface. The search scope is set to EXCHANGE. The query is built using a logical operator tree on the left and a table of conditions on the right.

	AND/OR	FIELD	OPERATOR	VALUE
+ X	<input type="checkbox"/> AND/OR	Subject	Contains	them
+ X	<input type="checkbox"/> Or	Folder path	=	Inbox
+ X	<input type="checkbox"/> And	From	=	amadmin
+ X	<input type="checkbox"/> Or	Has attachment	=	Yes

Buttons: Clear, Search

Result: Subject contains "them" OR Folder path Inbox AND Sender is "amadmin" OR item has an attachment

The screenshot shows the search results page for the query. The results are displayed in a table with columns: FROM, TO, SUBJECT, FOLDER, RECEIVED, VERSION, and several action icons. The results are sorted by received date.

FROM	TO	SUBJECT	FOLDER	RECEIVED	VERSION	Icons
amadmin	amadmin	"Who gave the report?" inquired Shcherbinin, taking the ...	Sent Items	02/09/21	1	Icons
amadmin	amadmin	"Who gave the report?" inquired Shcherbinin, taking the ...	Inbox	02/09/21	1	Icons
amadmin	amadmin	voice addressing the publican. "What have you killed a ...	Inbox	02/09/21	1	Icons
amadmin	amadmin	a seventy-pound weight were tied to it. He could run no ...	Inbox	02/09/21	1	Icons
amadmin	amadmin	up and down the room, and smoke one pipe after anothe...	Inbox	02/09/21	1	Icons
amadmin	amadmin	minute," said the resolute Duryashya taking a needle that...	Inbox	02/09/21	1	Icons

Page: 1 of 3, Items per page: 20

This query can be split into three parts:

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

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

Keyword search

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

Example

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:

Query

The screenshot displays the Metalogix Archive Manager ArchiveWeb search interface. At the top, there is a navigation bar with the Metalogix logo and the text 'Archive Manager ArchiveWeb'. Below this, a search bar contains the text 'keyword search'. To the right of the search bar are several tabs: 'archive', 'search', 'retention', 'report', 'tasks', and 'amadmin'. The 'search' tab is currently selected. On the left side of the search interface, there is a sidebar with the following sections: 'CRITERIA', 'MAILBOXES', and 'DOCUMENT TAGS'. The main search area is divided into two sections: 'Search scope' and 'Advanced'. Under 'Search scope', there is a checkbox labeled 'EXCHANGE' which is checked. Below this is a 'Keyword' field containing the text 'mother'. The 'Advanced' section contains a list of search criteria. It starts with 'Include:' followed by three checkboxes: 'Search in archived and deleted documents', 'Search in deleted documents', and 'Search in versions. The match will be shown for each version separately.' Below these checkboxes is a table with three columns: 'FIELD', 'OPERATOR', and 'VALUE'. The first row of the table has 'Subject' in the 'FIELD' column, 'Contains' in the 'OPERATOR' column, and 'them' in the 'VALUE' column. To the left of the table, there is a vertical sidebar with a list of search criteria. It includes a section for 'AND/OR' with a plus sign and a minus sign, and a section for 'Add new clause' with a plus sign. At the bottom right of the search interface, there are two buttons: 'Clear' and 'Search'.

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

Metalogix Archive Manager ArchiveWeb archive search retention report tasks amadmin

SEARCH HISTORY TEMPLATES

EXCHANGE SEARCH RESULTS

archived tagged locked

Result count: 1 Total rows selected: 0
[Select all rows](#) [Edit query](#)

Drag a column header here to group by that column

<input type="checkbox"/>	FROM	TO	SUBJECT	FOLDER	RECEIVED	VERSION			
<input type="checkbox"/>	amadmin@am19.local		of them had yet seen the manifesto, but they all knew it...	Inbox	02/09/21	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

First Prev Page: 1 of 1 Next Last Items per page: 20

0 1 Attachments

01005A.pdf

the same feeling as when his mother, his father, and his sister had embraced him, and tears of joy choked him so that he could not speak. The regiment was also a home, and as unalterably dear and precious as

Search Results

Keyword search

When both *Archive Manager for Exchange* and *Archive Manager for Files* are installed on the same server, keyword search results are listed in separate tabs. If **Match Highlight** and **Match Highlight Color** are configured in [Profile](#) settings, keywords will be highlighted with the predefined color. For example, if the keyword is **Commerce**, then all instances of the word are highlighted as shown below.

Metalogix Archive Manager ArchiveWeb archive search retention report tasks Administrator

SEARCH HISTORY TEMPLATES

EXCHANGE SEARCH RESULTS [FILES SEARCH RESULTS](#)

EXCHANGE SEARCH RESULTS

archived tagged locked

Result count: 1 Total rows selected: 1
[Clear selection](#) [Edit query](#) [Refresh](#)

Drag a column header here to group by that column

<input checked="" type="checkbox"/>	FROM	TO	SUBJECT	FOLDER	RECEIVED	VERSION			
<input checked="" type="checkbox"/>	timashford@democorp....	davidwebb@democorp....	Commerce	Inbox	09/11/20	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

First Prev Page: 1 of 1 Next Last Items per page: 20

Commerce

Timashford@democorp.com
 9/11/2020 2:33:46 AM
 To: davidwebb@democorp.com

- Version 1
- Retention 12/11/2020
- Tags:

0 1 Attachments

MENU

Advanced search

For advanced search, the search results for a specific product are listed since advanced search uses an expanded set of search criteria with product-specific search capabilities.

The screenshot shows the Metalogix Archive Manager ArchiveWeb interface. At the top, there's a navigation bar with 'Metalogix Archive Manager ArchiveWeb', a search input field containing 'keyword search', and links for 'archive', 'search', 'retention', 'report', 'tasks', and 'Administrator'. Below this is a sub-header with 'SEARCH', 'HISTORY', and 'TEMPLATES'. The main content area is titled 'EXCHANGE SEARCH RESULTS' and includes tabs for 'archived', 'tagged', and 'locked'. It shows a result count of 3 and 0 rows selected, with links to 'Select all rows' and 'Edit query'. A table lists search results with columns: FROM, TO, SUBJECT, FOLDER, RECEIVED, VERSION, and icons for actions like delete, lock, and share. The first three rows are highlighted, showing emails from 'juanchristie@democorp.com', 'timashford@democorp.com', and 'pabloneruda@democorp.com' all in the 'Inbox' folder, dated '09/11/20'. Below the table are pagination controls (First, Prev, Page: 1 of 1, Next, Last) and 'Items per page: 20'. A details pane at the bottom shows 'Commerce' and 'Juanchristie@democorp.com' with a timestamp '9/11/2020 2:33:48 AM'.

FROM	TO	SUBJECT	FOLDER	RECEIVED	VERSION	Icons
juanchristie@democorp.com	David Webb	Commerce	Inbox	09/11/20	1	[Icons]
timashford@democorp.com	David Webb	Commerce	Inbox	09/11/20	1	[Icons]
pabloneruda@democorp.com	David Webb	Commerce	Inbox	09/11/20	1	[Icons]

When you highlight an item from the list, the details of the item is displayed in the pane below the list. The contents of the item are also displayed. If the item is an email with an attachment or a file, the contents of the attachment or file are visible only if the application to view the attachment is also installed on the server. For example, if a PDF viewer is not installed on the server, then the contents of the PDF file will not be visible.

Search Operations

Search operations are asynchronous. Every search operation is listed in the [Tasks](#) page.

When you highlight an item, select one or more items or select all items, you can choose an action from a menu to operate on the highlighted or selected item.

When Keyword search is used, keywords in the search results can be highlighted (this function is available only for Exchange search).

Edit query - redirects you to the previous search page where you can perform a new search after editing the existing query.

List view contains the following special columns:

- Folder – specifies item's location (for Exchange search results it is mailbox folder name, for Files search results it is directory path)

List columns can be managed (show/hide) in the Columns section of the user profile (click <UserName> / Manage settings / Profile).

i NOTE: For Archive Manager for Files matches can be displayed also for non-supported files such as MS Office documents and HTML. For more details see the "List view conventions"

section.


Search History

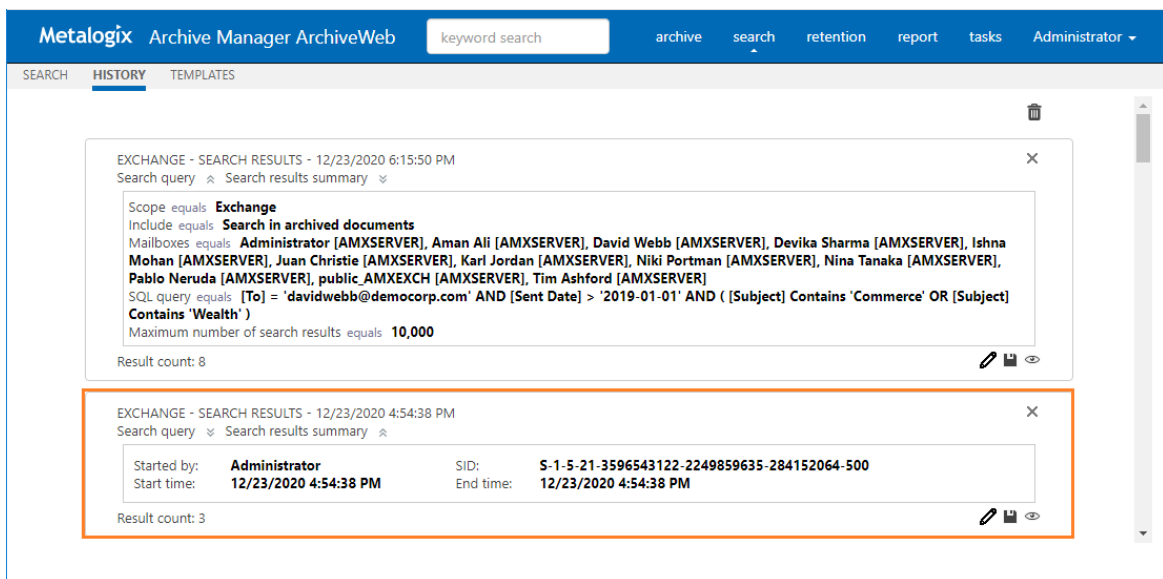
Every search in ArchiveWeb is logged and displayed in the **History** page. Search history is stored in the search history cache separately for each logged in user who runs a search. Each search history log entry indicates the search type (Exchange, File or Keyword) and the start date and time of the search in the log entry header.

In this topic:


- [Viewing the search result summary](#)
- [Viewing the search query](#)
- [Viewing the search results](#)
- [Editing the search query](#)
- [Saving the search query](#)
- [Extending search history](#)
- [Cleaning up search history](#)

Viewing the search result summary


1. Click **Search** on the main menu and then click **History**.
2. Click  to show the **Search result summary** section.

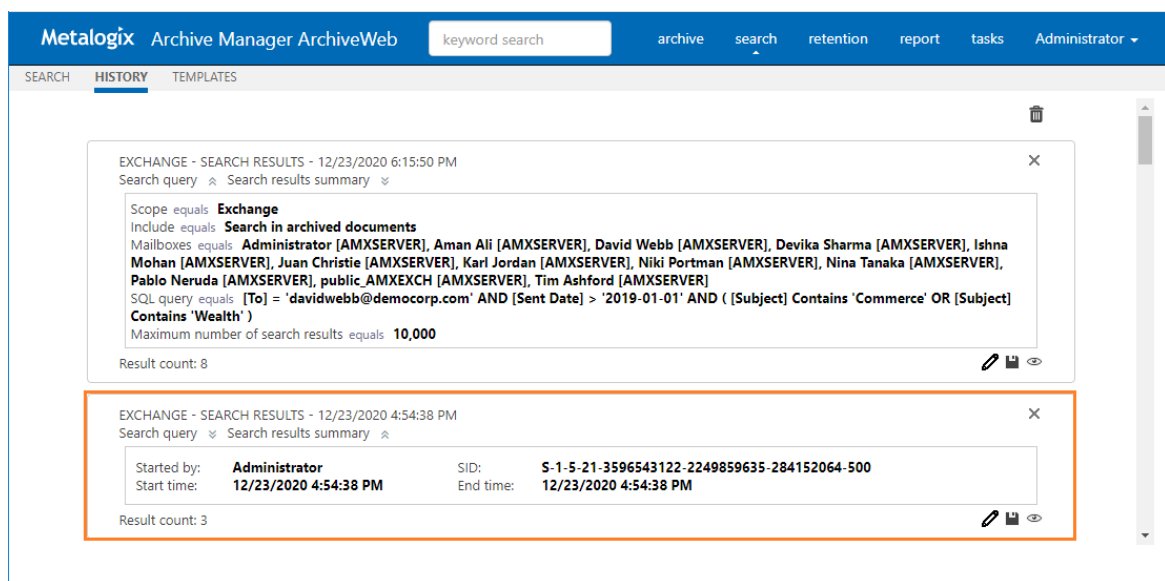


The search result summary section presents the following information


- a. **Started by** - username of the person who ran the search.
 - b. **Start time** - date and time the search was started.
 - c. **SID** - unique search identifier.
 - d. **End time** - date and time the search was completed.
3. Click  to hide the **Search result summary** section.

Viewing the search query

1. Click **Search** on the main menu and then click **History**.
2. Click  to show the **Search query** section.




The search query section presents the following information


- a. **Scope equals** - the application data that is searched.
 - b. **Include equals** - the data set within the search scope that is included in the search.
 - c. **Mailbox equals** - the mailboxes that are included in the search.
 - d. **SQL Query equals** - SQL query that was used to search for archived items.
 - e. **Maximum number of search results equals** - the upper limit of the result set that was configured for ArchiveWeb when the search was started.
3. Click  to hide the **Search query** section.

Viewing the search results


1. Click **Search** on the main menu and then click **History**.
2. Locate the search you want to review.

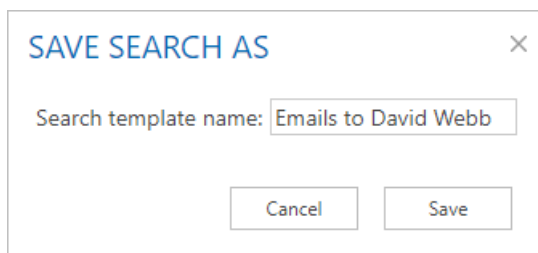
3. Click  to rerun the search. The search results page will open with the search results.

Editing the search query

1. Click **Search** on the main menu and then click **History**.
2. Locate the search you want to review.
3. Click  to edit the search query. The main search page opens where you can review and revise the search options and query.

Saving the search query

1. Click **Search** on the main menu and then click **History**.
2. Locate the search you want to review.
3. Click  to save the search query. The *Save Search As* dialog opens.



4. Enter a suitable name in the **Search template name** field. Then click **Save** to save the search query as a template.

Extending search history

The search history page displays the last 10 searches by default. To customize the display limit follow the steps described below:

1. Open the C:\Program Files\Metalogix\MAMSearch\PamSearch.exe.config file.
2. Add a new section name (if it does not exist) under the <configSections> node

```
<?xml version="1.0" encoding="utf-8"?>
  <configuration>
    <configSections>
      .
      .
      .
      <section name="SearchHistory"
type="System.Configuration.NameValueFileSectionHandler,System,
Version=1.0.3300.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" />
    </configSections>
```

3. Create a new **SearchHistory** section (if it does not exist)

```
<?xml version="1.0" encoding="utf-8"?>
  <configuration>
    <configSections>
      .
      .
      .
      <section name="SearchHistory"
type="System.Configuration.NameValueFileSectionHandler, System,
Version=1.0.3300.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" />
    </configSections>
    <SearchHistory>
      <add key="maxcount" value="20" />
    </SearchHistory>
    .
    .
    .
  </configuration>
```

4. The **maxcount** value can be any number between 1 and 2147483647. When this key is missing from the *PamSearch.exe.config* file, the default value 10 is used.

Cleaning up search history

Search history is stored in SQLite files in a cache folder. The default location is `C:\Program Files (x86)\Metalogix\MAMSearch\SearchCache\<userSID>*.sqlite` and the cache is periodically cleaned. To customize the search history cache retention time limit follow the steps described below:

1. Open the `C:\Program Files\Metalogix\MAMSearch\PamSearch.exe.config` file.
2. Add a new section name (if it does not exist) under the `<configSections>` node

```
<?xml version="1.0" encoding="utf-8"?>
  <configuration>
    <configSections>
      .
      .
      .
      <section name="SearchHistory"
type="System.Configuration.NameValueFileSectionHandler, System,
Version=1.0.3300.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" />
    </configSections>
```

3. Create a new **SearchHistory** section (if it does not exist)

```
<?xml version="1.0" encoding="utf-8"?>
  <configuration>
    <configSections>
      .
```

```

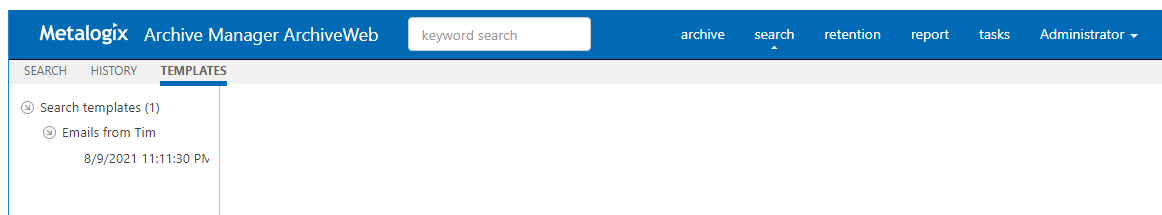
        .
        .
        <section name="SearchHistory"
type="System.Configuration.NameValueFileSectionHandler, System,
Version=1.0.3300.0, Culture=neutral,
PublicKeyToken=b77a5c561934e089" />
    </configSections>
    <SearchHistory>
        <add key="timelimit" value="365.23:59:59" />
    </SearchHistory>
        .
        .
        .
    </configuration>

```

4. The **timelimit** format is `days.hours:minutes:seconds`. For example, the value **365.23:59:59** indicates that the search history entries will be stored for 365 days, 23 hours, 59 minutes and 59 seconds.

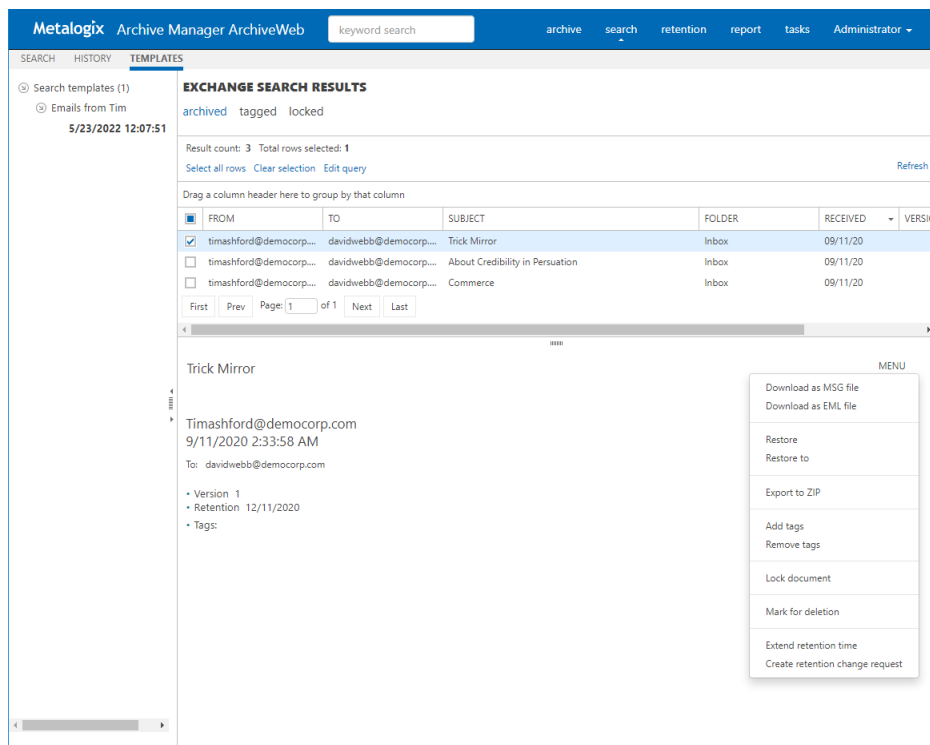
Search Templates

When you expand the **Search > Templates** node, you may see a list of search templates that have been saved so far (search results can be saved from **History** tab as described in the “*History*” section).



Click on the arrow next to the template to expand the template node. Under this node you will see the link to respective search results - with the date and time when they were saved.

Clicking the search results link will display the search results in the main pane. Here you can benefit from the filtering functionality as in all ArchiveWeb lists – grouping, filtering by status (tagged, locked etc.) and creating custom filters.



The MENU link in the top right corner of the item detail pane offers additional actions for the selected item:

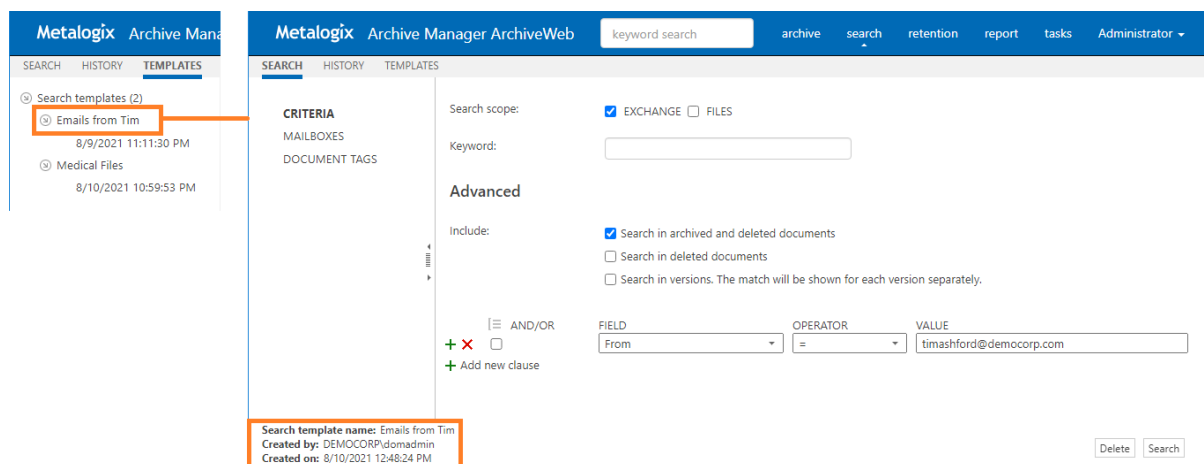
- **Download to MSG file** or **Download to EML file** – download the selected item.
- **Restore** or **Restore to** – restore the selected archived item to original item.
- **Export to ZIP** - exports the item to a ZIP file.
- **Add tags** or **Remove tags** – adds or removes a tag from the selected item.
- **Lock/Unlock document** – locks or unlocks selected item.
- **Mark for deletion** – marks the selected item for deletion. The item will be deleted according to the retention category in use.
- **Extend retention time** – increase the time for which the item cannot be deleted from the archive. Setting shorter retention than the actual retention is not supported. After the specified period (in months) the item can be deleted manually or by a *Delete job* if such is scheduled in respective Enterprise Manager.
- **Create retention change request** – send a request to the approving person for selected item deletion or increased retention time when it can't be deleted from the archive. The *Approver* who is the person with adequate permission in Archive Manager, will receive the request through email notification if Archive Manager SMTP is properly configured.

Templates handling

When you click on any template name under the **Templates** node, ArchiveWeb redirects you to the given search criteria page. It can be either Exchange, Files or Common search depending on the template. All search criteria are configured by the template. You can click **Search** to perform the same search with the search settings specified in this template.

On the screenshot below you can see how the template is displayed once you click its name under the **Templates** node. The main pane presents the usual Exchange/Files/Common search window. The only difference is the bottom part of the windows. There you see the template metadata (name, user, date of creation etc.) and action buttons:

- **Search** – runs search query
- **Delete** – deletes the template completely from the Templates node



Report

With Report functionality at hand, users have overview of their email and/or file archives. Clear concise information in terms of how many items were archived, when, what is their size – original or shortcut etc. Files features also information on retrieved items.

Report section consists of two tabs - **Statistics** tab with information on archived emails/items and **Audit** tab with logs of user actions.

Please note that full access to this functionality must be granted to the user under Permissions (see the Roles & Permissions section).

Statistics

This tab was designed to give the administrator fast, reliable and comprehensive information about archived emails/files. The number of emails/files, their size as well as space saved on the disc at archiving – all these essential data can be sorted by folder, user or time period. Exporting the statistics is also possible.

Statistics are available for:

- Exchange Archive
- Files Archive

NOTE: Not all **Statistics** functions may be available for the logged-on user. The user must be granted the necessary permissions. For more information see the **Roles** and **Permissions** sections.

Exchange Archive statistics

To generate the Archive Manager for Exchange statistics click on the **Report** from the main menu bar. Then from the grey sub-bar click **Statistics** and unfold the **Exchange Archive** node. Then select whether you want to display statistics for:

- **Archived messages** (count of messages) or
- **Archived size** (size of original message; shortcut size etc.)

NOTE: DATE RANGE SELECTION IS ALSO POSSIBLE (TO IMPROVE PERFORMANCE). The statistics can be generated also in Archive Manager for Exchange Enterprise Manager.

Files Archive statistics

To generate the Archive Manager for Files statistics click on the **Report** from the main menu bar. Then form the gray sub-bar click **Statistics** and unfold the **Files Archive** node. Then select whether you want to display statistics for:

- **Archived** (details on archived files) or
- **Restored** (detailed on restored files)
- **Archived versions** (details on files with versions in the archive)
- **Retention** (details on files whose retention ends at the listed date) - a new column "Retention remaining days" and pagination have been added

NOTE: The statistics can be generated also in Archive Manager for Files Enterprise Manager.

Range: 9/3/2018 - 9/18/2019 Generate

Export

Drag a column header here to group by that column

YEAR	MONTH	DAY	HOUR	COUNT
2019	7	13	9	3
2019	5	22	10	35
2019	5	22	9	20

Create Filter

Statistics table functions are similar to ArchiveWeb table functions:

- Change the column sorting order by selecting the given column header and clicking its down/up arrow on the right (in case the arrow is not visible adjust the width of the column by dragging the line)
- Group table data by any column. To do so, drag the column header to the bar right above the table. Generated groups can be expanded by clicking the arrows next to them. As usual, the sorting order can be changed by clicking the little arrow in the dragged column header.

To export the data, click **Export** at the top-right of the table. The *Export* menu opens and you can choose to export the statistics to Excel, CSV, PDF or RTF.

Range: 9/3/2018 - 9/18/2019 Generate

Drag a column header here to group by that column

YEAR	MONTH	DAY	HOUR	COUNT
2019	7	13	9	3
2019	5	22	10	35
2019	5	22	9	20

Create Filter

Export

- Export to CSV
- Export to PDF
- Export to RTF
- Export to XLSX

Audit tab

This tab is accessible if:

- Auditing is configured (see the “Auditing” manual) and
- logged-on user has Auditing permissions activated

Auditing feature allows administrator (or other users defined in web config) to log defined user actions in the email archive, i.e. the administrator has an overview of archived / restored / retrieved emails and performed keyword searches. Even all actions made in Enterprise Manager console (both for Archive Manager for Exchange and for Files) are logged.

To view the logs, from the main pane click **Report**, then **Audit** from the grey sub-bar. Then unfold the **Email Archive** node to access the Archive Manager for Exchange logs or **Archive Manager for Files** node to access the Archive Manager for Files logs. Then you can browse through different types of logs – archive actions (Archive node), retrieve actions (Retrieve node) etc.

NOTE: Not all **Audit** tab functions may be available for the logged-on user. The functions must be allowed for the user. For more information see the **Roles** and **Permissions** sections.

The screenshot shows the Metalogix Archive Manager interface. The top navigation bar includes 'archive', 'search', 'retention', 'report', 'tasks', and 'Administrator'. The left sidebar has a tree view with 'ArchiveWeb' expanded, showing 'Archive Manager for Exchange Search' and 'Archive Manager for Files Search'. Below this are 'Logon' and 'Tags' with a list of roles: Audit, Labor, Market, Riga, Sparta, Training, and Venice. The main pane is titled 'AUDIT' and shows a 'Result count: 1 Total rows selected: 0'. A table with columns 'LOG LEVEL', 'LOG DATE', 'METHOD', 'COMPUTER', 'USER', and 'CATEGORY' contains one row: 'Info', '07/13/19', 'ArchiveWeb.Search', '121mam2 [10.16.1...', '121DEMO2\user002', and 'Archive Manager f...'. Below the table are pagination controls: 'First', 'Prev', 'Page: 1 of 1', 'Next', 'Last', and 'Items per page: 20'. A 'Create Filter' button is also present. Below the table, a details pane shows: 'Product: ArchiveWeb', 'Category: Archive Manager for Exchange.Search', 'Log level: Info', 'Log date: 7/13/2019 9:27:39 AM', 'Method: ArchiveWeb.Search', 'Computer: 121mam2 [10.16.121.13]', 'User: 121DEMO2\user002', 'Message: Search request', 'Tags:', and 'Details:'. A context menu is open over the details pane with options: 'Add tags', 'Remove tags', 'Export results to ZIP', and 'Download log entry'.

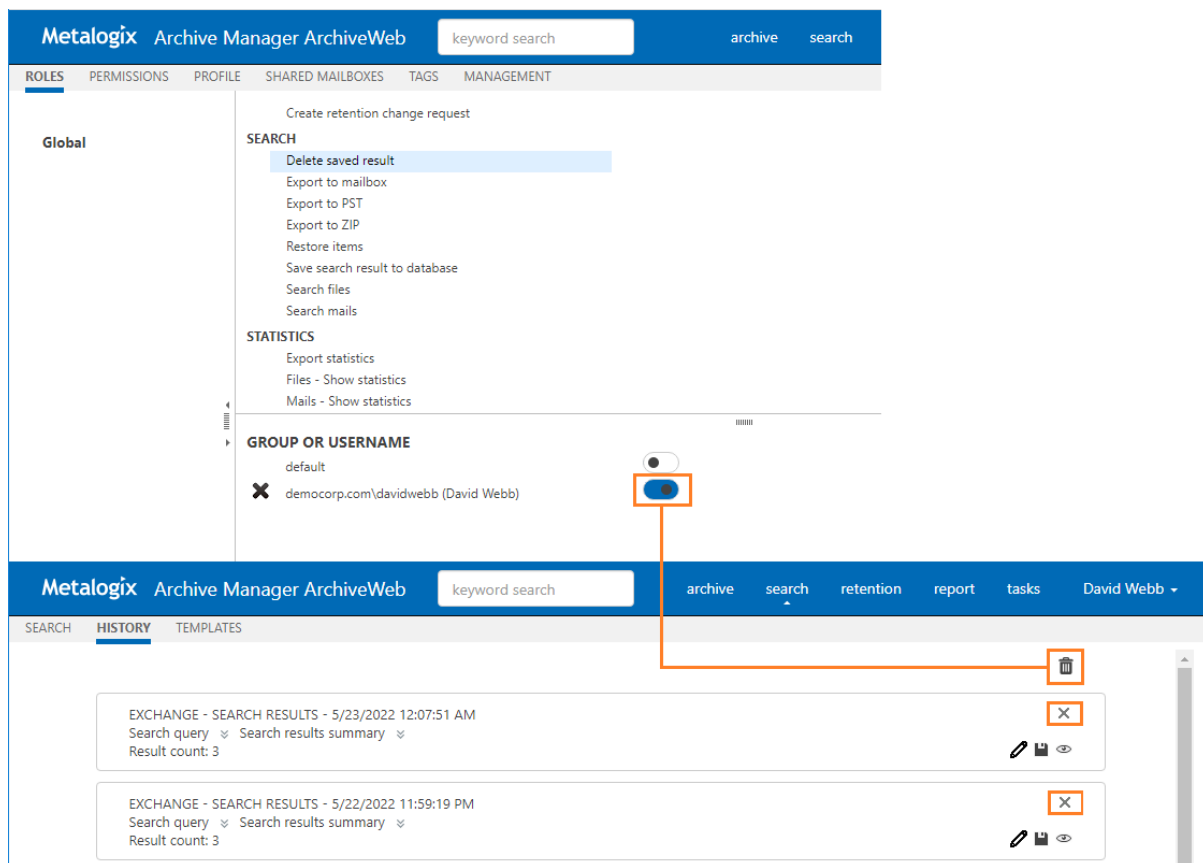
The log entries of the selected action are displayed in the main pane. Data of the log entry selected in the main pane are displayed below the list view (see the screenshot above).

Audit Search

Special settings are available for **Email Archive/ Search** logs. Every search action is logged in the auditing log. By default user sees only its own search result logs displayed. To make all users' search logs available for the user, s/he must have "Access all mailboxes" permission allowed for Auditing (under **<LoggedOnUser>/ Manage Settings/ Roles**).

To check your auditing search:

1. Perform search
2. Preview and export the search result by permission
3. deactivate the "Delete" functionality for user (under **<Logged on user> / Manage settings / Roles**)



List view conventions

List view functions are the same as in other ArchiveWeb lists:

- Change the column sorting order by selecting the given column header and clicking its down/up arrow on the right (in case the arrow is not visible adjust the width of the column by dragging the line)
- Group table data by any column. To do so, drag the column header to the bar right above the table. Generated groups can be expanded by clicking the arrows next to them. As usual, the sorting order can be changed by clicking the little arrow in the dragged column header.

Any audit entry can be downloaded or tags can be added or removed from it. All tasks are available through the **More actions** menu. Click the **More actions** menu button located on the bottom right just below the list view. Then you can e.g:

- **Add tags** or **Remove tags** : these options allow you to add or remove tags from selected items (for more information on tags see the “Tagged items tab” section)
- **Export results to ZIP** (only for ArchiveWeb/Archive Manager for Exchange/Search or ArchiveWeb/Archive Manager for Files/Search entries); this option will export search result items with summary to Excel file and allow to download the created ZIP to the user's local machine.

i **NOTE:** This function is only available if the user has “Export results to ZIP” role allowed for Audit (under <LoggedInUser>/ Manage Settings/ Roles).

- **Download log entry:** this option will download single log entry in log file format on user local machine.
- **Export to XLS:** When two or more items are checked, the **More actions** menu appears automatically under the list view. This option will export selected items to XLS file on the user's local machine and provide a download link to the same file.



NOTE: When downloading large amount of items it is reasonable to split the data in more XLS files. To do this value for the key "ItemsPerXLS" needs to be changed in ArchiveWeb's web.config file. The default value is "500000" and represents number of rows for single XLS file during the export. In order to set correct value for the key please refer to Excel limits on the page <https://support.office.com/en-us/article/excel-specifications-and-limits-1672b34d-7043-467e-8e27-269d656771c3>.

For more information on Auditing (how to install, configure it etc.) see the *Auditing Guide*.

Tasks

Tasks option in the navigation ribbon at the top of the page gives the user an overview of asynchronous tasks started by the logged-on user.

Tasks in the list are ordered. Running tasks are at the top of the list. Then waiting tasks follow (in the order in which they will be started). Completed and failed tasks are listed with the most recently completed task listed first.

TASKS					
STATUS	TASK				
	START	FINISH	TOTAL COUNT	PROGRESS	
Running	[EXCHANGE] - EXPORT TO ZIP 4/9/2022 3:30:22 PM		1,121	572	×
Completed	[FILES] - EXPORT TO ZIP 4/2/2022 1:15:09 PM 4/2/2022 1:35:27 PM		5,768	Download	×
Failed	[EXCHANGE] - ADD TAG 3/15/2022 9:01:34 AM 3/15/2022 9:05:11 AM		10,000	Error log	×

Refresh

The **Tasks** window allows the following operations:

- **Pin** icon - click this icon keep the task list open at all times while you browse to other pages.
- **Refresh** - click this button to reload the task list. The list is automatically refreshed at a pre-defined interval (see Profile / Automatic refresh interval)
- **Close** (X) icon - click X at the top right corner to close the Tasks window

The **Tasks** list contains the following columns:

- **Status** - task status can be one of the following:
 - Waiting - task is waiting in the queue to be run
 - Running - task is running
 - Completed - task successfully completed
 - Failed - task completed with errors
- **Task** - task name including version name and operation name e.g. [AUDIT] - EXPORT TO XLS means that the logs from Auditing are exported to and Excel file.

- **Start** - task start date and time.
- **Finish** - task completion date and time.
- **Total Count** - number of items to be processed by the task
- **Progress** - displays the progress or operation result. For export tasks such as Export to XLS, Export to PST and Export to ZIP this column displays a counter (how many items are already processed). For other operation types this column is empty. When task has finished, this column can contain download link (link to download processed items or link to download error logs).
- **Delete All** icon - deletes all the tasks from the list. Select **Don't show this dialog again** option in the confirmation dialog to hide the confirmation dialog for all the other tasks that are deleted. This action is valid for the current session and the confirmation dialog will be displayed again when the user starts another session.
- **Delete row (X)** icon - deletes the task from the list.



NOTE: Export tasks such as "Export to ZIP" or "Export to PST" can be very resource consuming and can cause some issues, especially time-outs. To minimize these problems, see the [Export Tasks IIS Settings Suggestions](#).

Addendum

- [Troubleshooting](#)
- [List of Default ArchiveWeb Permissions](#)

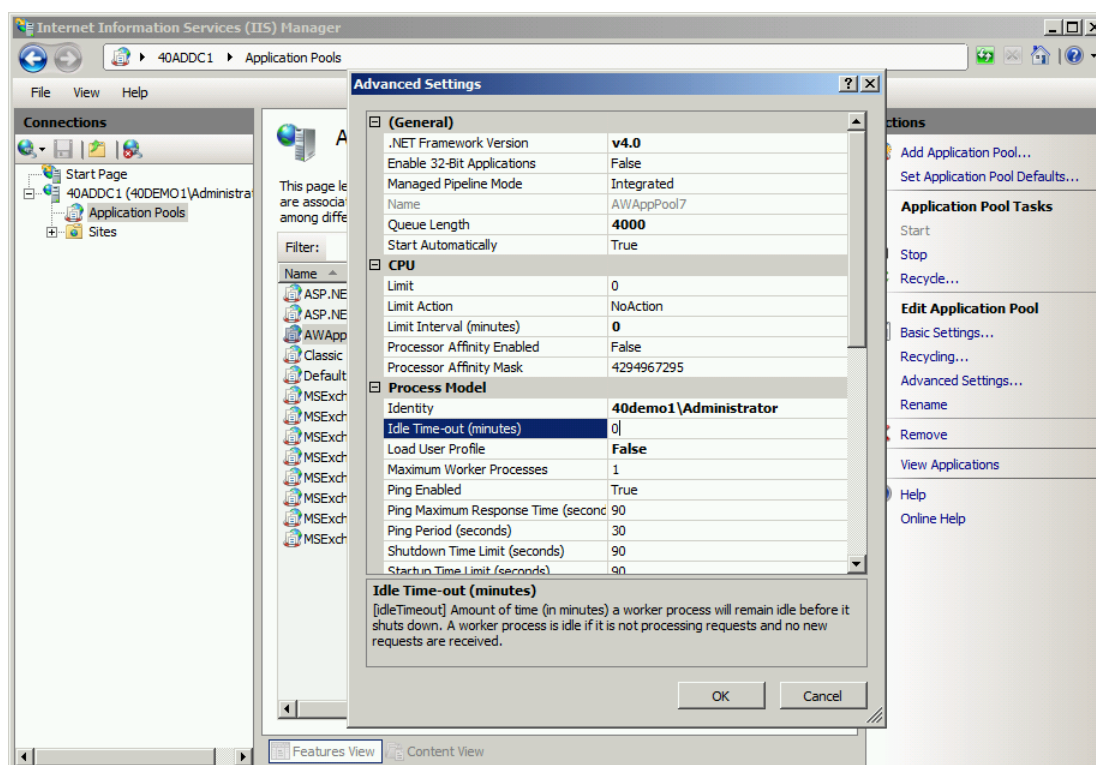
Export Tasks IIS Settings Suggestions

Export tasks such as "Export to ZIP" or "Export to PST" can be very resource consuming and can cause some issues, especially time-outs. To minimize these problems, try configuring the following settings:

Process Model - Idle Time-Out

Modify the Idle Time-Out setting for *AWAppPool7*, *FilePAMAppPool* and/or *EPAMAppPool4* application pools in the IIS.

For example: Go to IIS -> Server Name -> Application Pools -> AWAppPool7 and click **Advanced settings**. Set the value to zero.

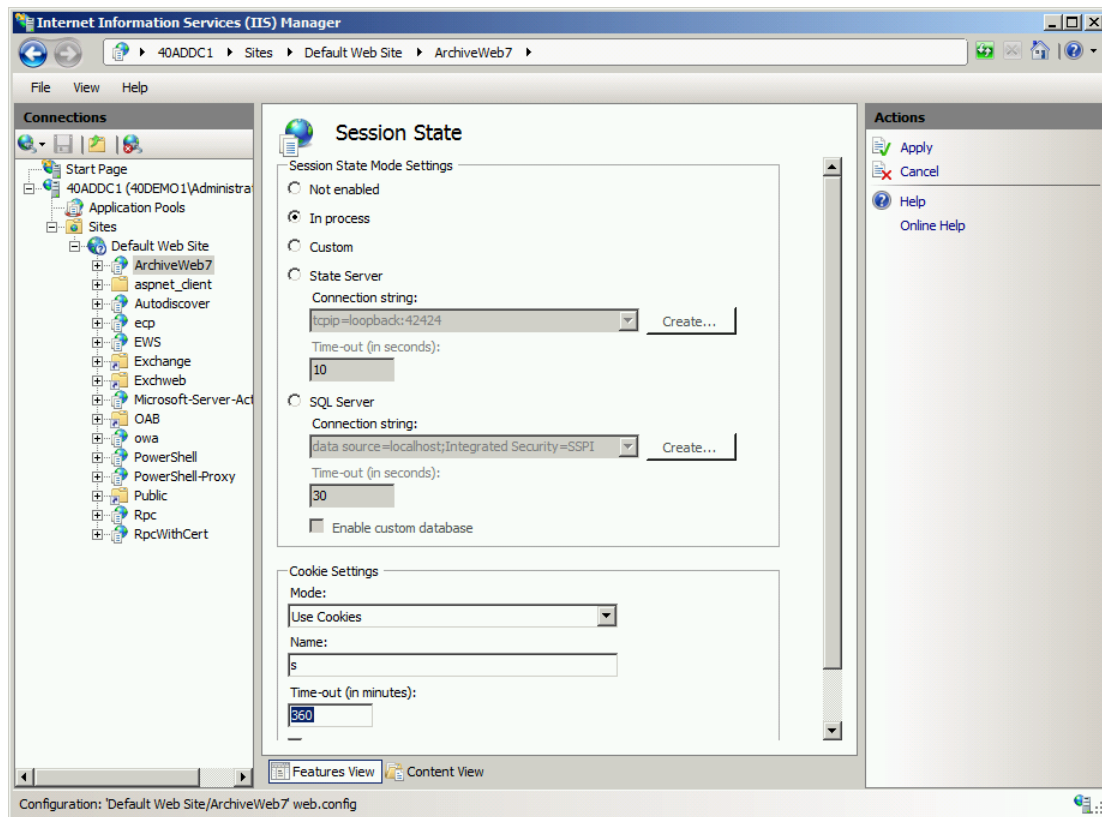


Web Sites - Session Time-Out

Export task can run several minutes or hours. When the task is running a session time-out can occur. This will cause the failure of the task operation.

To prevent this from happening, modify the **Time-out** setting for *ArchiveWeb*, *ExchangePAMWS* and/or *FilePAMWebService* web sites in the IIS to large enough number.

For example: Go to IIS -> Server Name -> Sites -> Default Web Site -> ArchiveWeb click on **Session State**



Please note: for ArchiveWeb web application – make sure the “sessionState” setting in web.config is synchronized with IIS’ cookie time-out. Application session time-out will expire when the IIS’ cookie time-out value is reached therefore for correct ArchiveWeb functionality the “sessionState” in web.config should be set to same or lower value.

Troubleshooting

This section offers solutions to most common problems users can encounter in relation to new ArchiveWeb.

IIS Error 403 Forbidden

When this error occurs after installing/updating the ArchiveWeb application it is necessary to run the following commands from the command line to re-register the .NET Framework:

```
c:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\aspnet_regiis.exe -iru  
c:\WINDOWS\Microsoft.NET\Framework\v4.0.30319\iisreset
```

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Technical Support Resources

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

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

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