Quest® Archive Manager for Exchange 8.9

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.

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Updated March 2024
Version 8.9

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1

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
- Export

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

2

Requirements

System requirements

- 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)

> **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.

3

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.

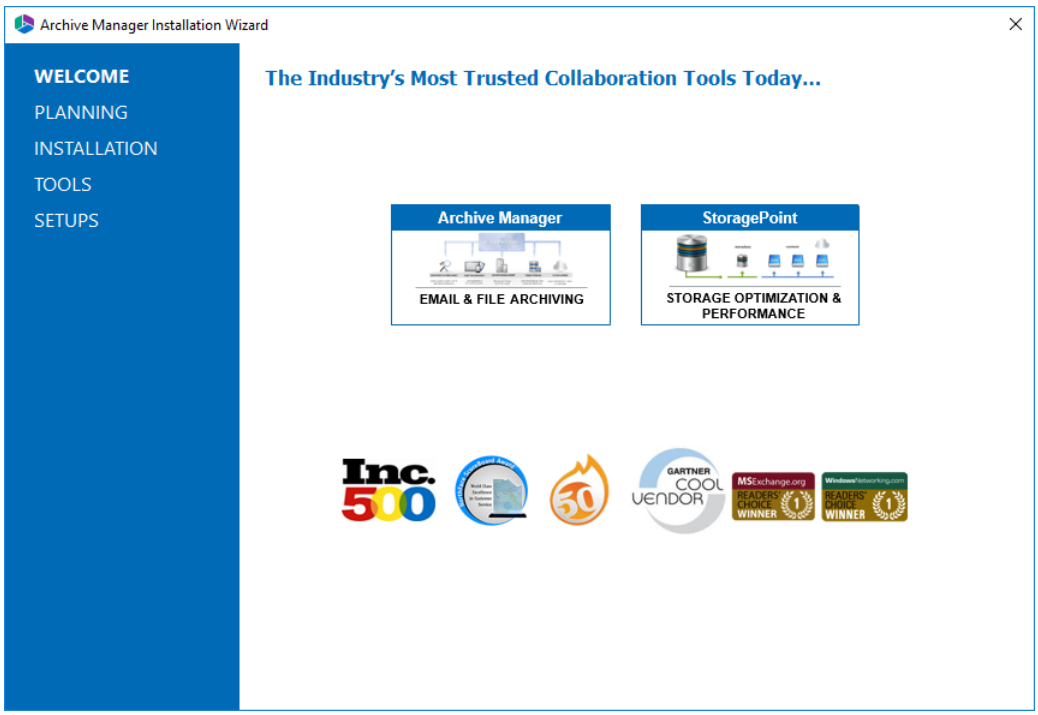
In this chapter:

- Steps to install automatically with the product installer
- Steps to install manually with the ArchiveWeb installer
- Steps to verify the installation

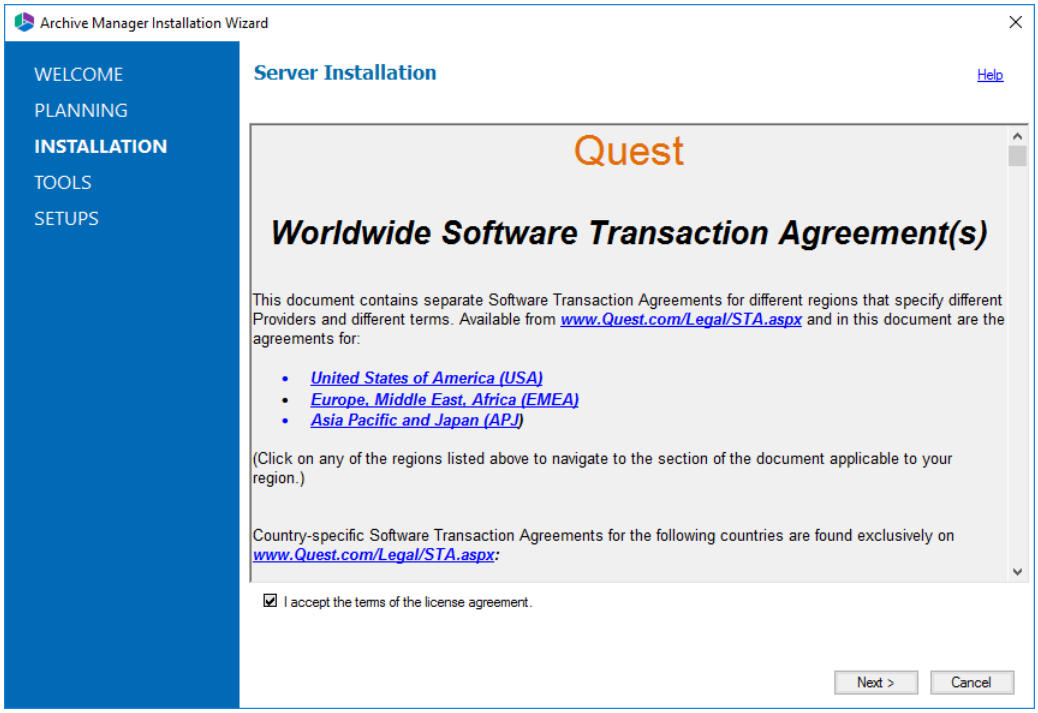
Steps to install automatically with the product installer

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.

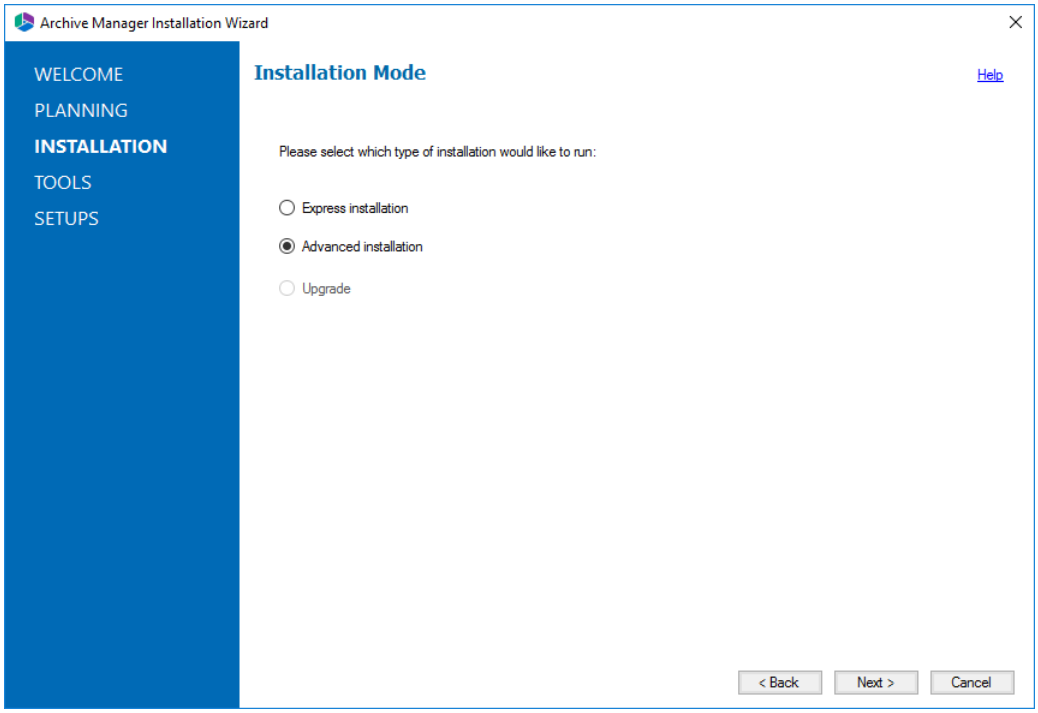


4. From the navigation panel on the left, click **INSTALLATION**. The *Server Installation* window opens.

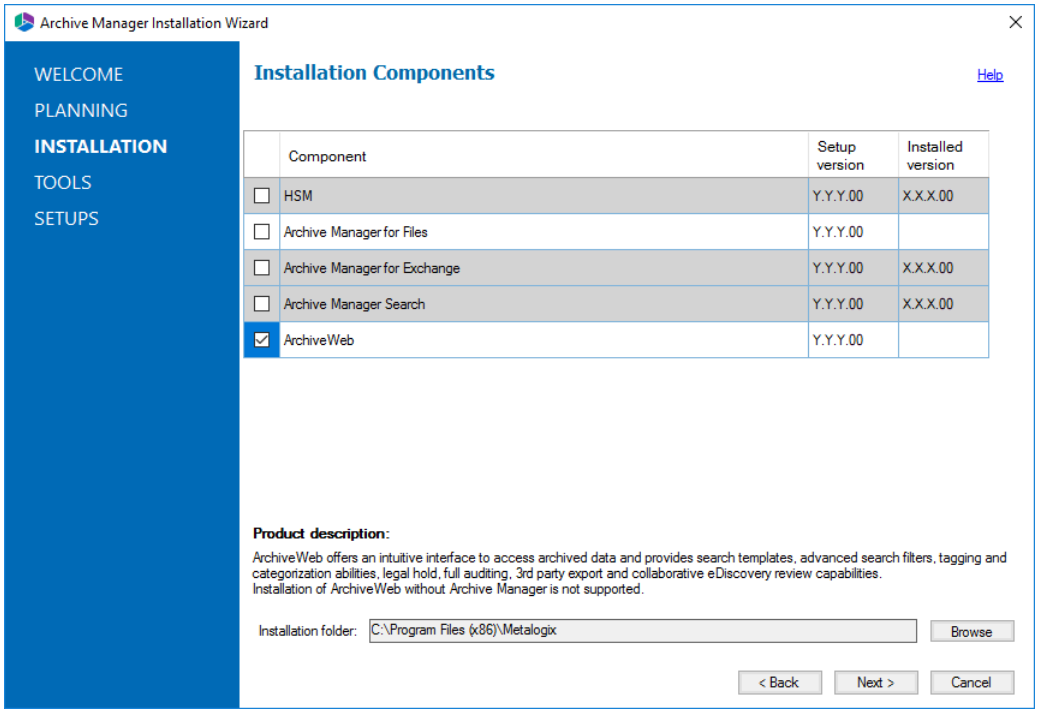


Read the **Software Transaction Agreement**. If you wish to proceed, select the **I accept the terms of the license agreement**.

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

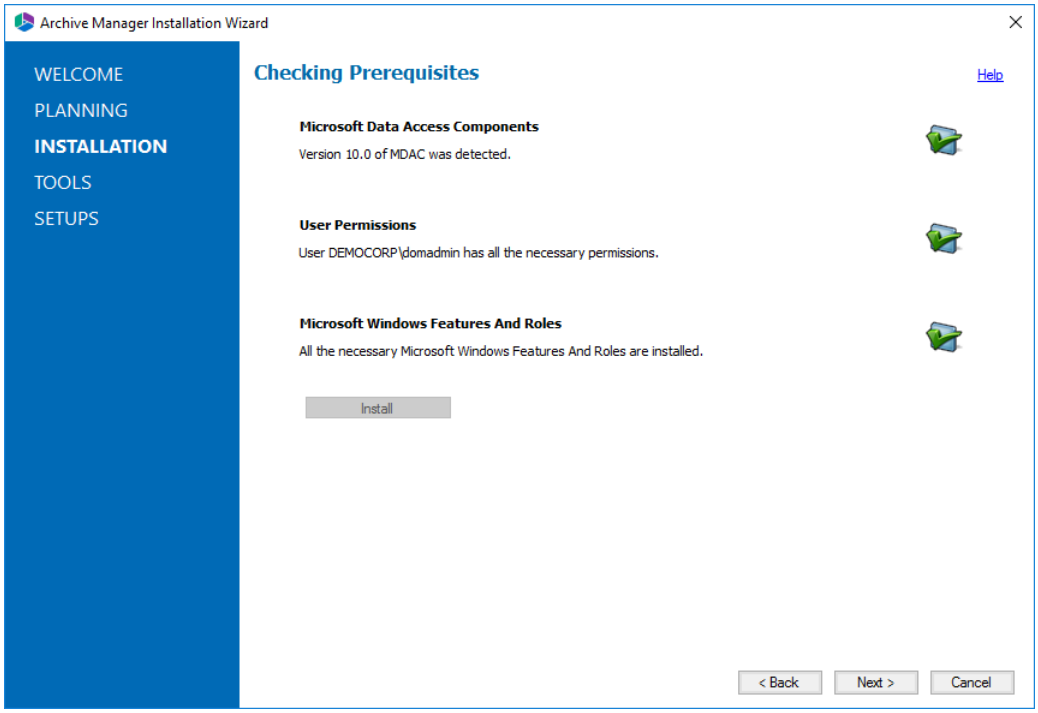


6. Click **Next**. The *Installation Components* window opens.

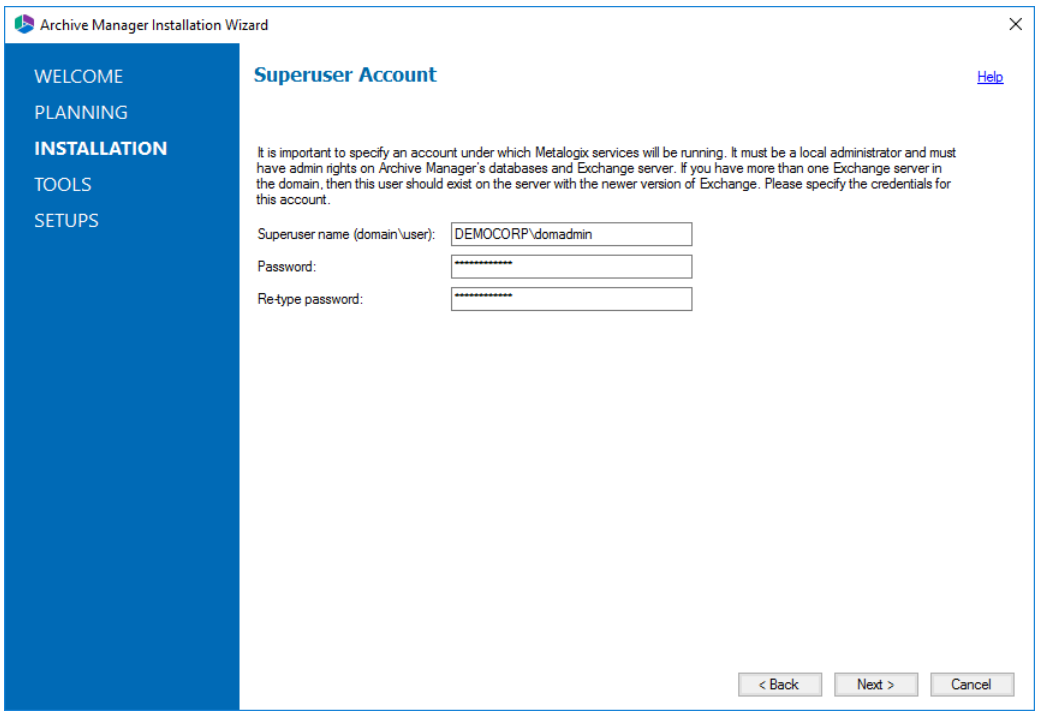


Verify that Archive Manager for Exchange is installed and then select **ArchiveWeb**. Click **Browse** to change the installation folder if necessary.

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

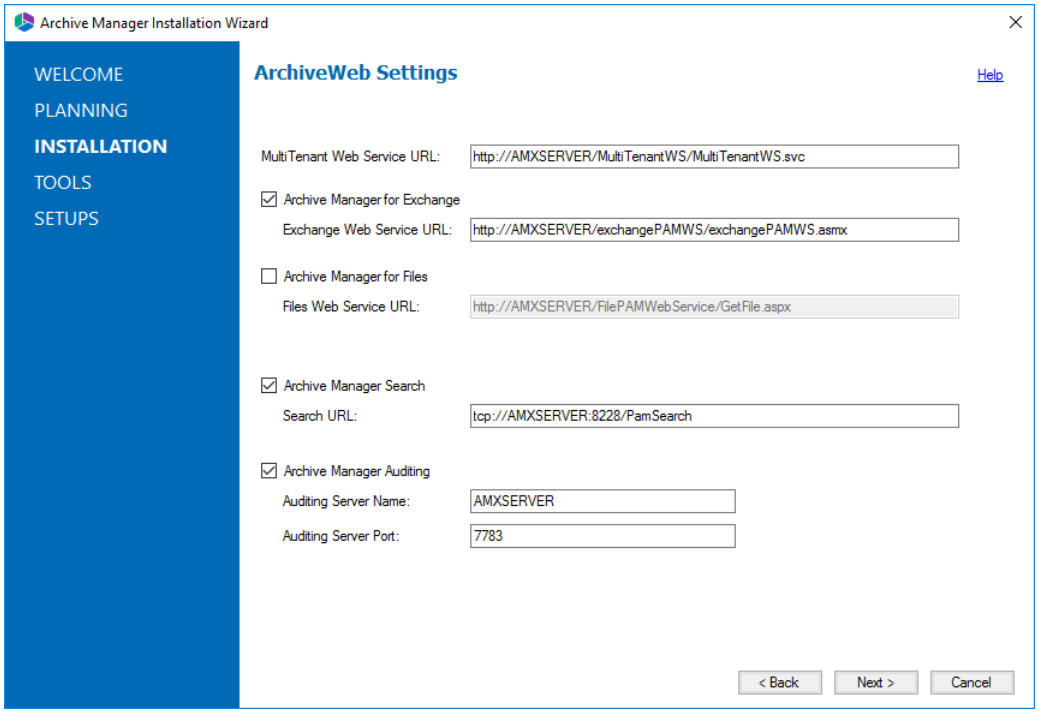


8. Click **Next**. The *Superuser Account* window opens.



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

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



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.

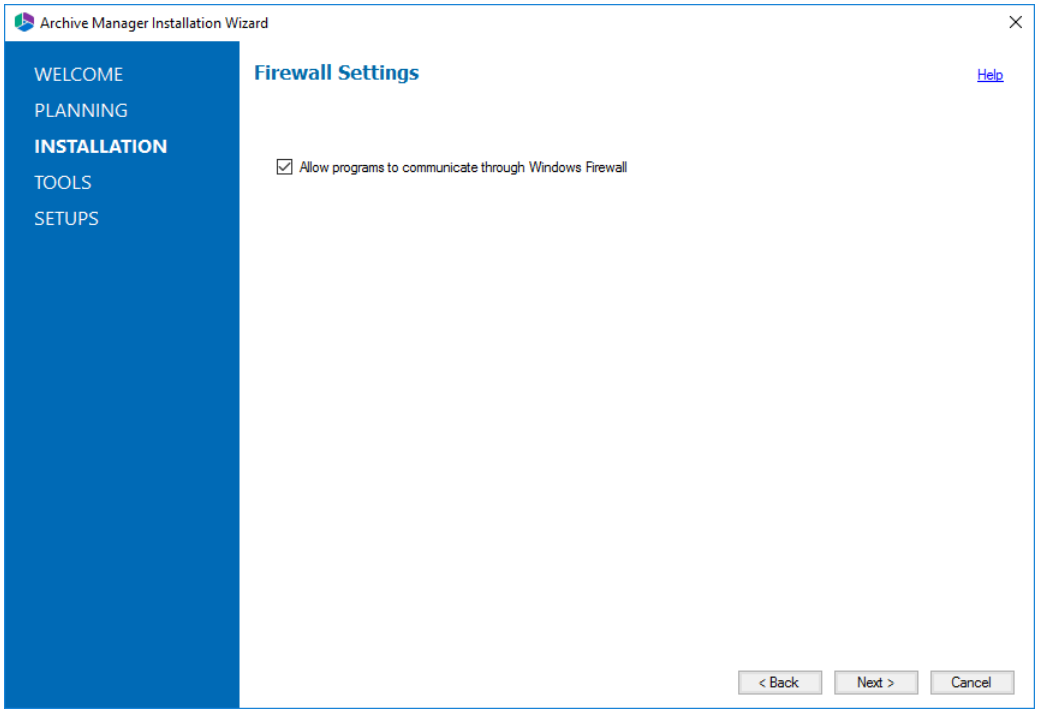
Archive Manager Search - select this option to install web services for Archive Manager Search.

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.

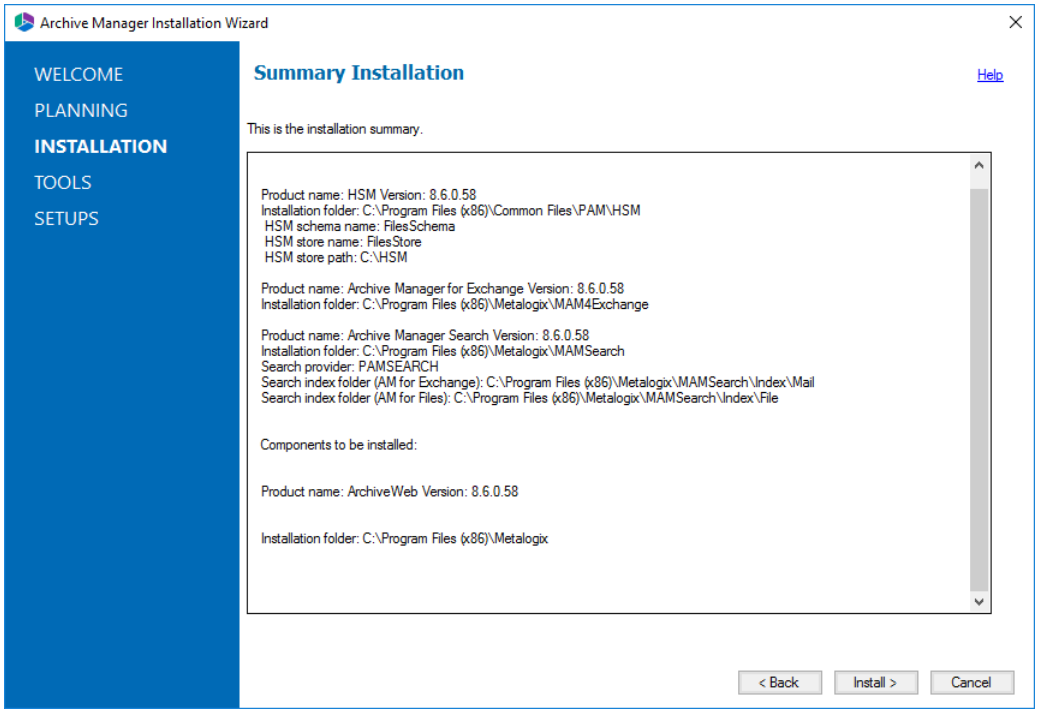
Auditing server name & port - specifications for the machine where auditing component is installed

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

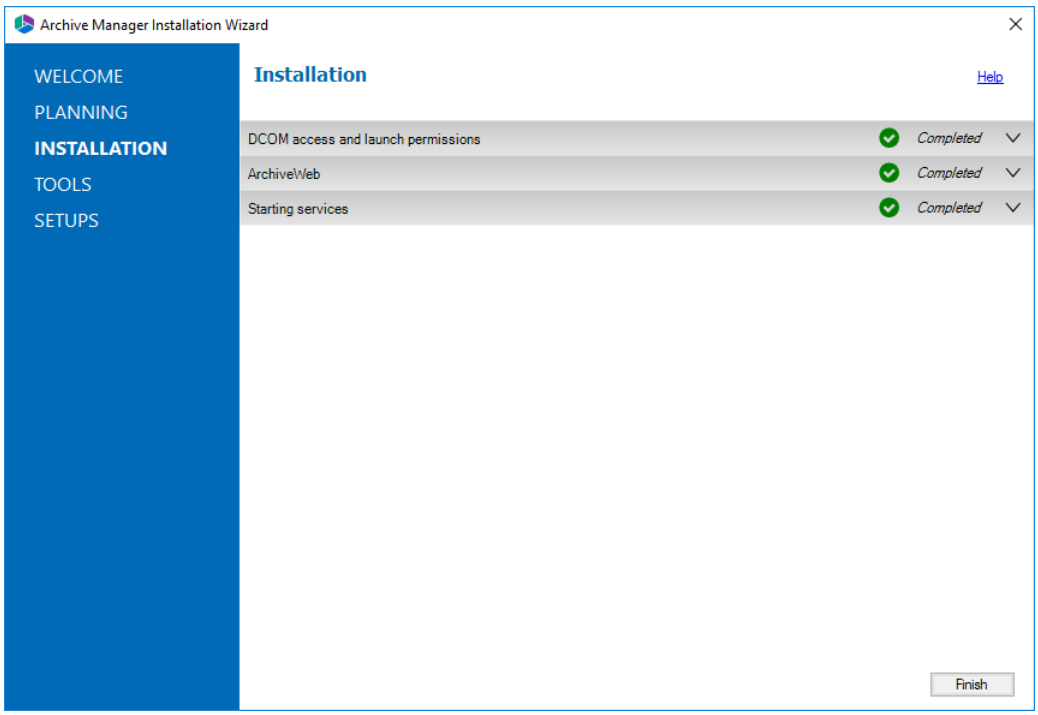


Select **Allow programs to communicate through Windows Firewall**. Archive Manager for Exchange features will be then able to communicate through the firewall.

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

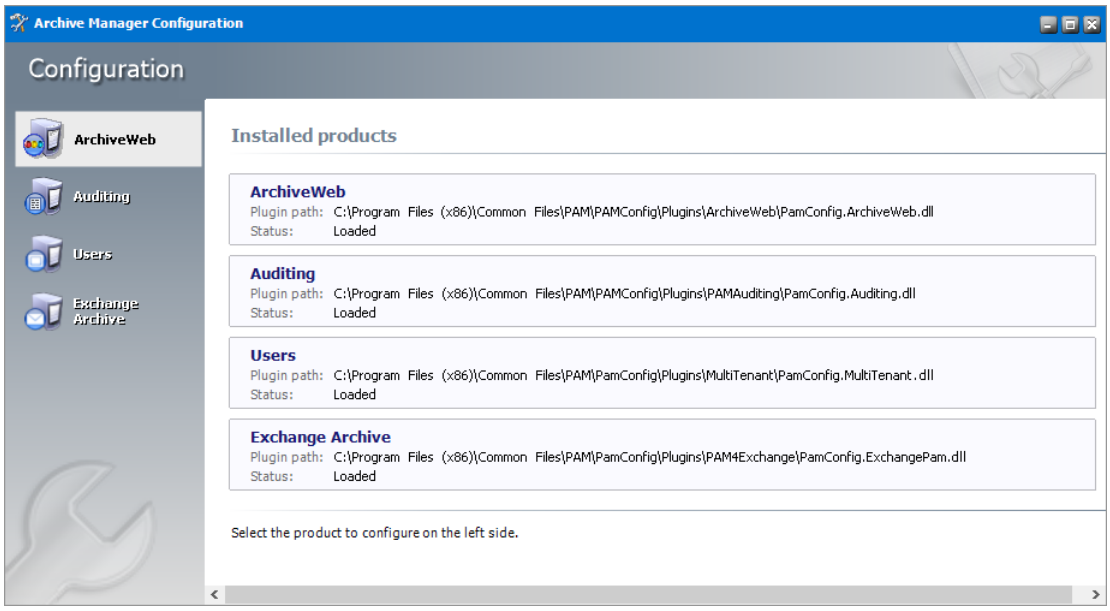


12. Click **Install** to start the installation. If a feature installation fails or completes with a warning, expand the row to view and address the problem.



13. Click **Finish** to complete the installation step.

14. To quickly verify the install, open **Start** > **Quest** > **Archive Manager Configuration**. The *Archive Manager Configuration* wizard opens and the **ArchiveWeb** tab is available..

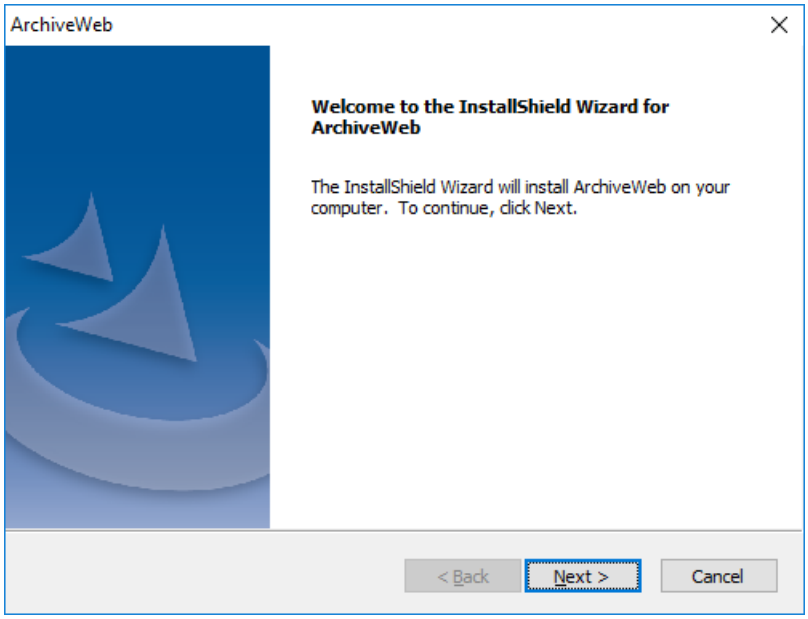


Steps to install manually with the ArchiveWeb installer

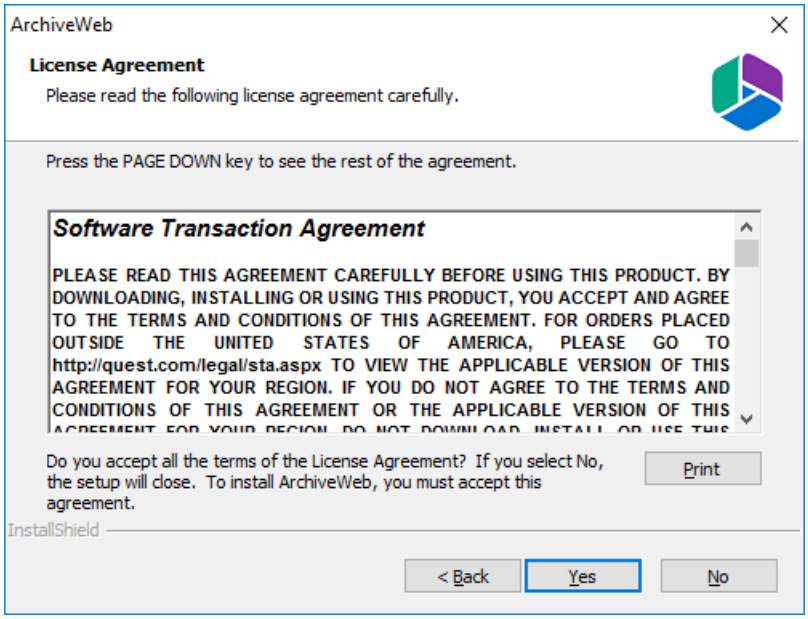
1. Login with the credentials of the **enterprise administrator** (eg. **democorp\domadmin**) to the Archive Manager for Exchange server (designated as the *Archive* server in a distributed deployment).
2. Download and unzip the installation package if it is not already available.
3. Open PowerShell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

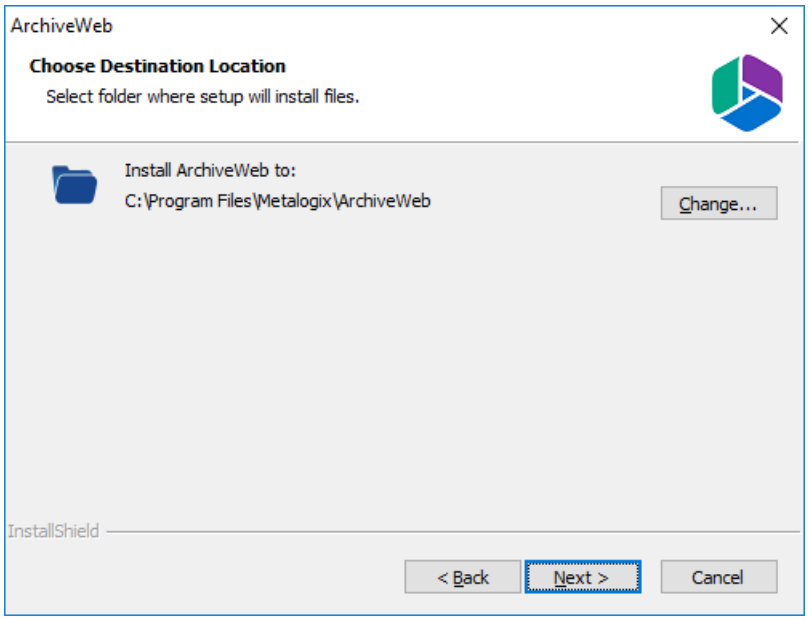
4. Run the setup file `<installer package folder>\ArchiveWeb\Archive Manager ArchiveWeb setup.exe` to start the ArchiveWeb installer wizard.



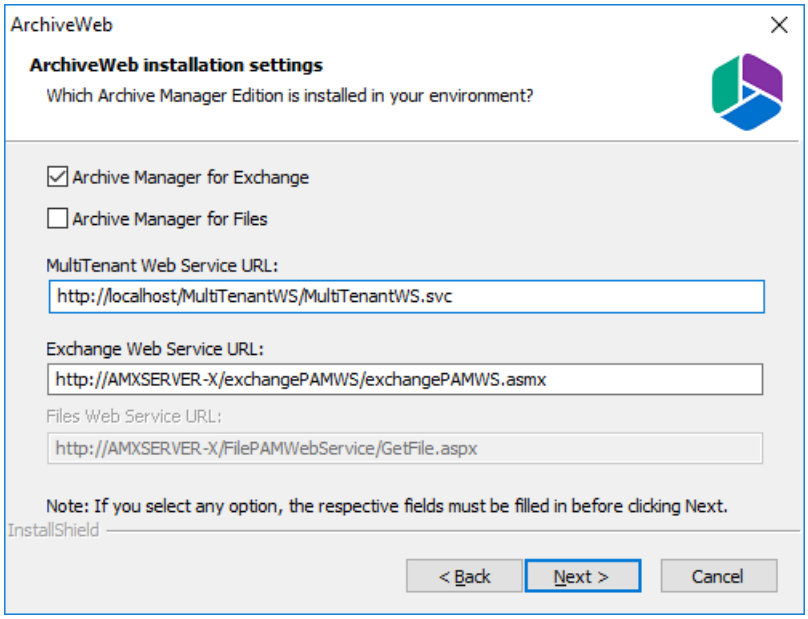
5. Click **Next**. Then *License Agreement* window opens.



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.



The properties are as described below:

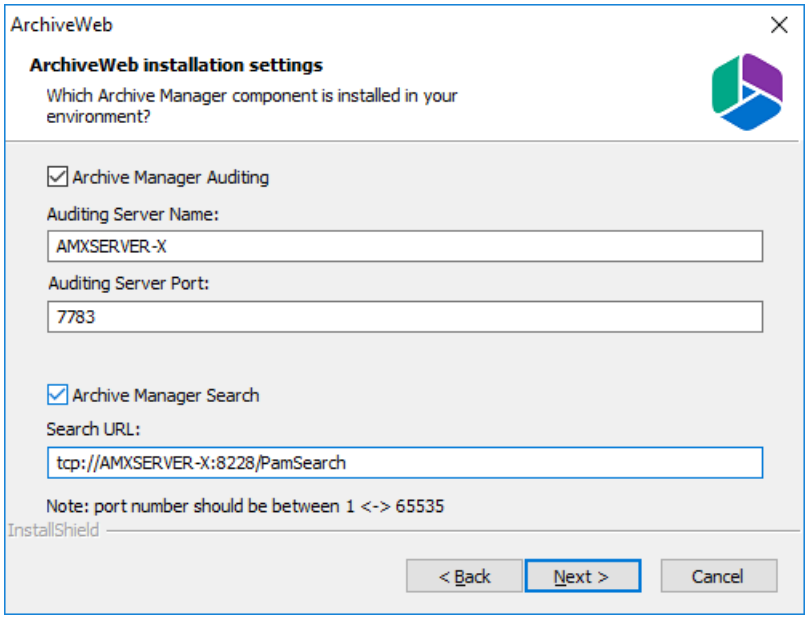
a. **Archive Manager for Exchange** - select this option to install features specific to Archive Manager for Exchange.

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.



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.

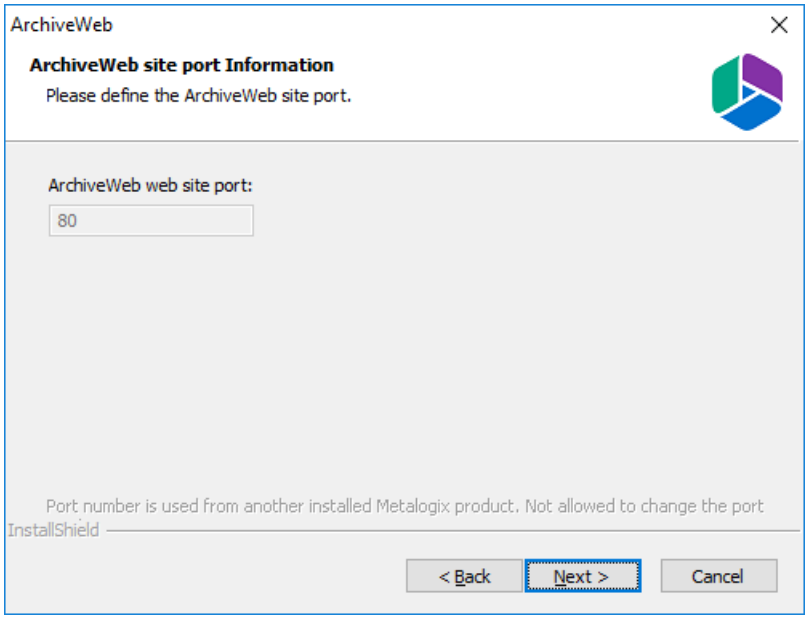
> **NOTE:** To find this information open the *Archive Manager Configuration* tool on your auditing server. Then open the *Connection* tab in the *Auditing* section.

d. **Archive Manager Search** - select this option if Archive Manager Search is installed in your environment.

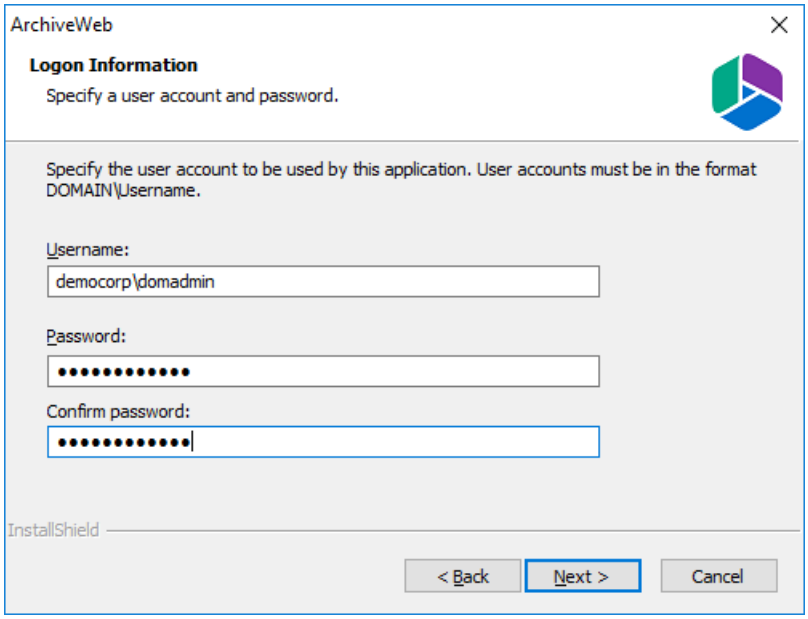
e. **Search URL** - the search URL used by the search feature in the format tcp://<search-server>:<search-port>/PamSearch.

> **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.



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



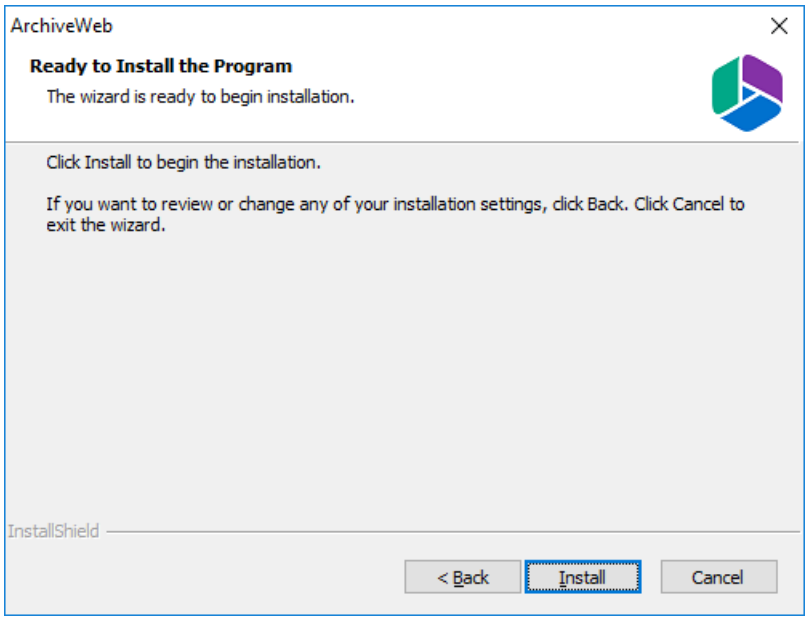
Enter the account credentials as described below:

a. **Username** - username of the enterprise administrator in the format `domain\username`.

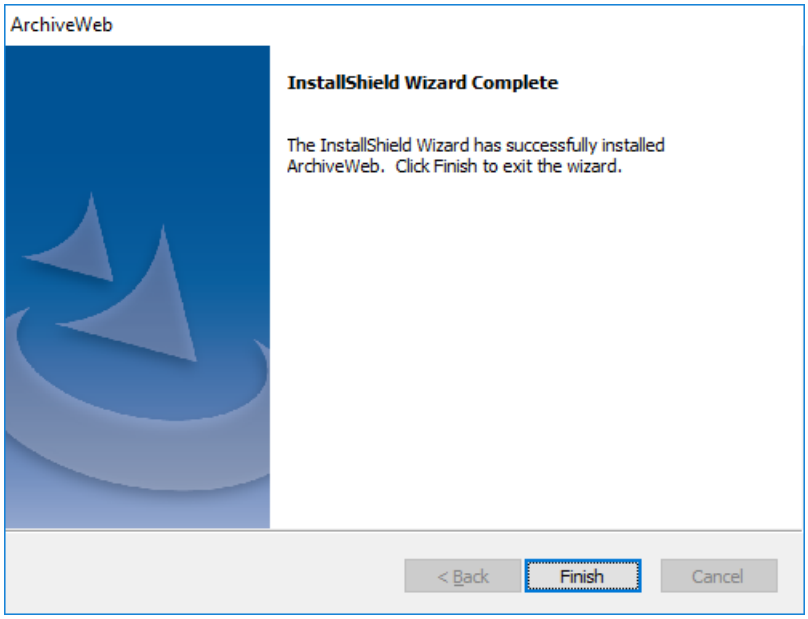
b. **Password** - password for the enterprise administrator.

c. **Confirm password** - re-enter the password for the enterprise administrator.

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



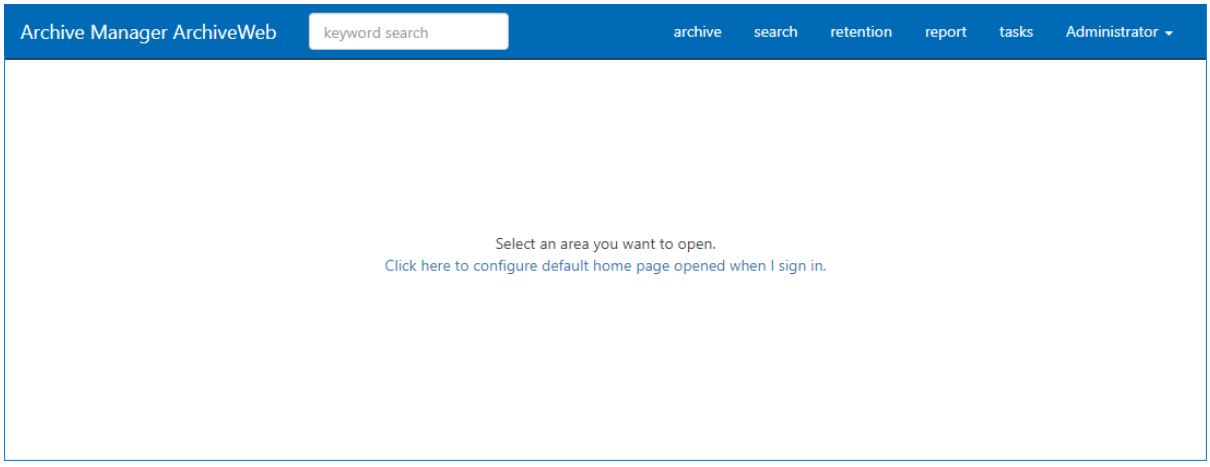
12. Click **Back** to review or revise the settings, or click **Install** to start the installation.



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.



4

Configuration

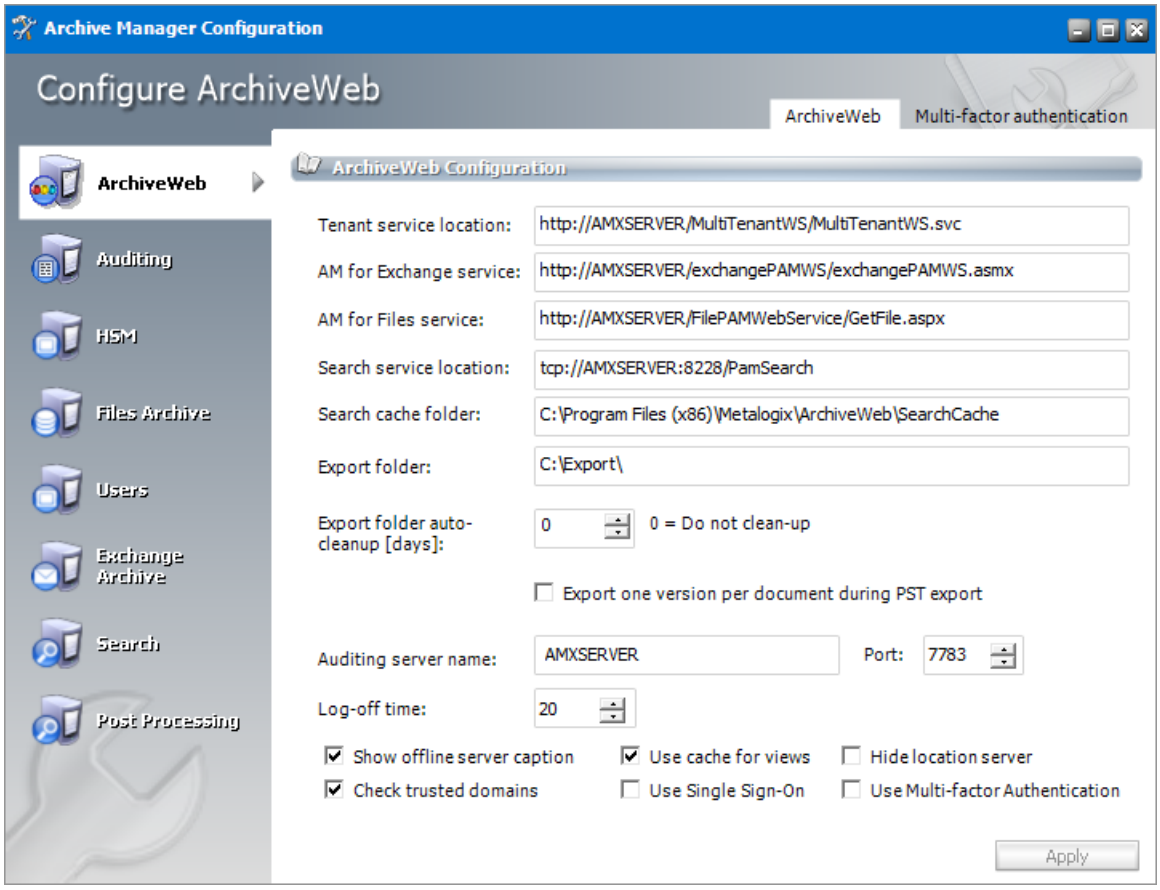
In this chapter:

- 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 *Archive Manager Configuration* tool.

The *Archive Manager 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.

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.

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

Use Multi-factor authentication - select this option to activate the fields in the *Multi-factor authentication Configuration* window. See Multi-factor Authentication for more details.

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 Microsoft Entra admin center.
2. Configure ArchiveWeb with the Archive Manager Configuration tool.

Create a new application in the Microsoft Entra admin center

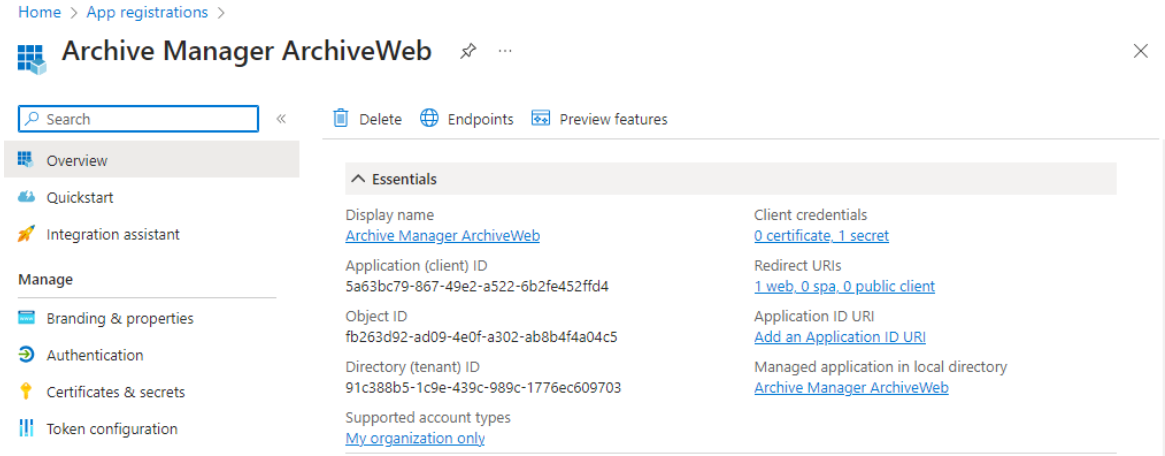
ArchiveWeb requires a specific Microsoft Entra ID registration to be created that is used to return an authentication token back to the ArchiveWeb after a user is authenticated via Microsoft portal.

1. Login to the Microsoft Entra admin center (https://entra.microsoft.com/) using your administrator credentials. 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 Microsoft Entra ID tenant that you want.
2. From the navigation pane, click **Identity** > **Applications** > **App registrations** and then click **New registration**. The *Register an Application* page opens.
3. Provide the following information on this page as described below:
   a. **Name** - Enter a meaningful application name that will be displayed to users. For example, **Archive Manager ArchiveWeb**.
   b. **Supported account types** - Select the account type you would like your application to support that best meets your company policy.
   c. **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`)

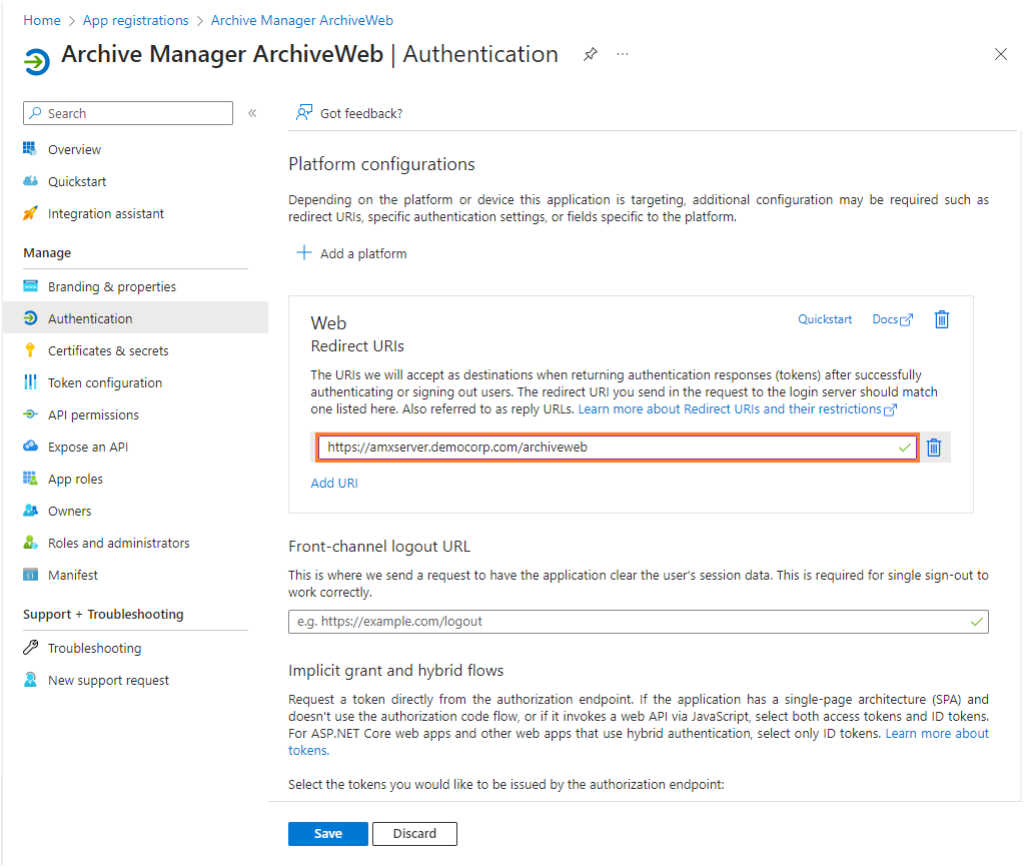
NOTE: The HTTPS protocol is required for MFA to work with O365. To ensure the HTTPS can be used by the ArchiveWeb server, follow the steps below;

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.

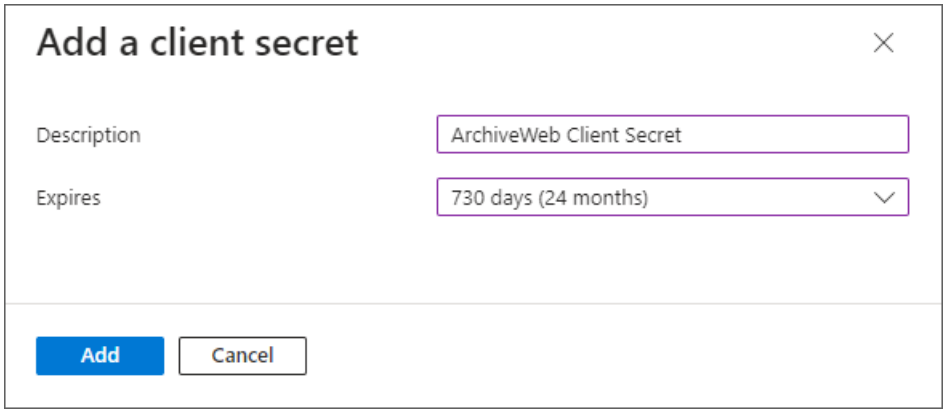
4. Click **Register**.
5. Your application is registered. Microsoft Entra ID assigns a unique application (client) ID to your application, and the application's *Overview* page opens.



6. From the navigation pane, click **Branding & properties**. 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. If you revise any values, remember to click **Save**.



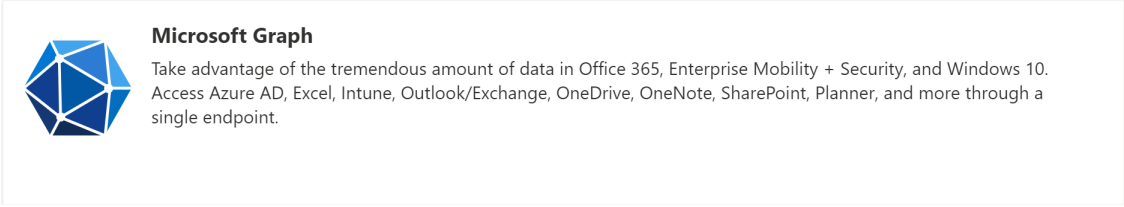
8. From the navigation menu, click **Certificates & Secrets**. In the *Client secrets* section click **New client secret**. The *Add a client secret* page opens.
9. Enter values as described below:
   a. **Description** - enter a meaningful description. For example, ArchiveWeb Client Secret.
   b. **Expires** - set the expiry term that best meets your company policy.



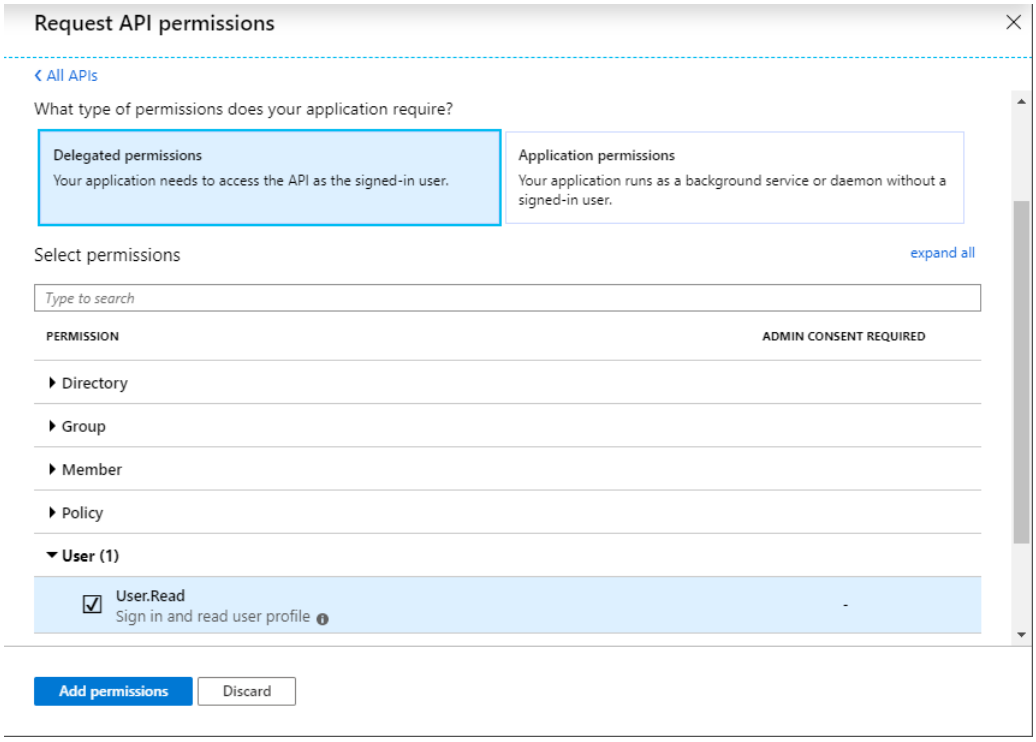
10. Click **Add**. the client secret is displayed on the *Certificates & Secrets* page.

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

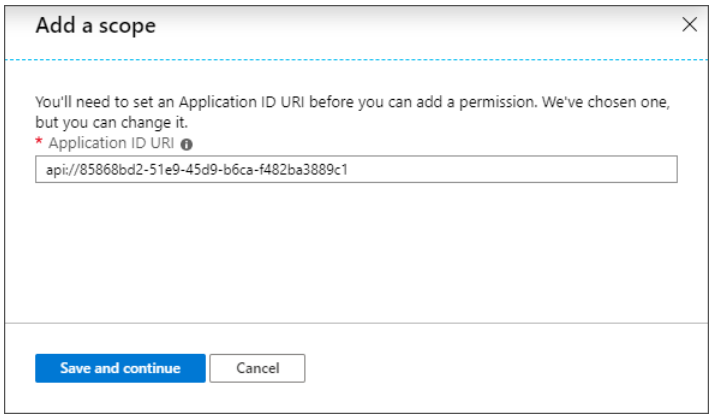
11. From the navigation menu, click **API Permissions**. and then click **Add a permission**. The *Request API permissions* page appears.
12. From the **Microsoft APIs** category, scroll down to the *Supported legacy APIs* section and select **Microsoft Graph**.



13. From the *Request API permissions* page for Microsoft Graph that appears, select **Delegated permissions**.



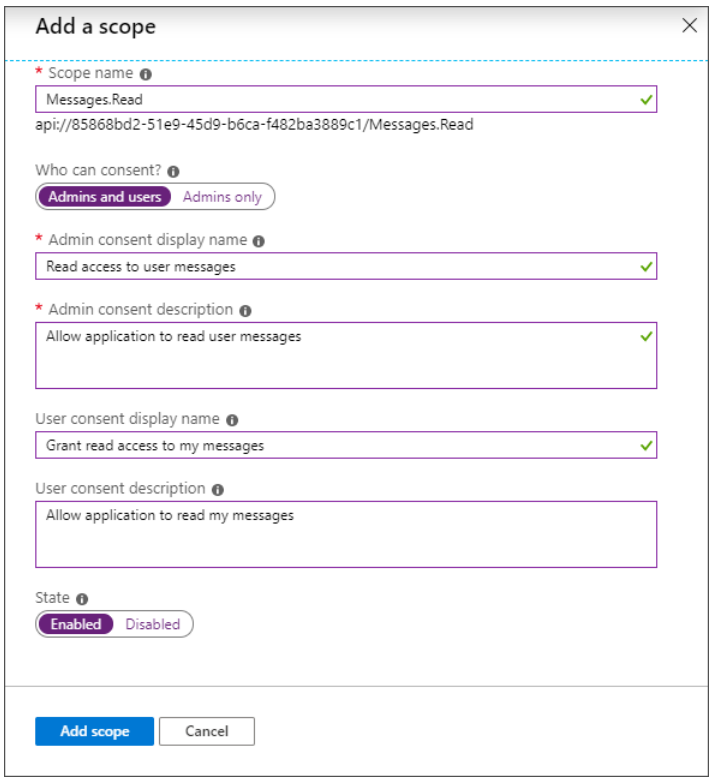
14. Click **Add permission**.
15. From the navigation menu, click **Expose an API**. In the *Scopes defined* section, click **Add a scope**. The *Add a scope* page opens.



Microsoft Entra ID 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.

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

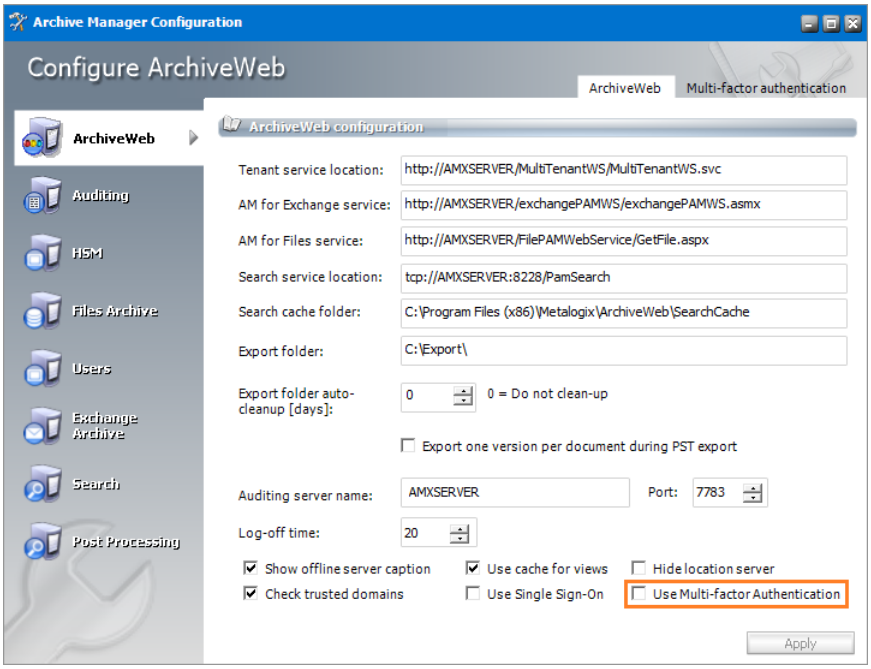
16. Click **Save and continue**. The *Add a scope page* displays more options.



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

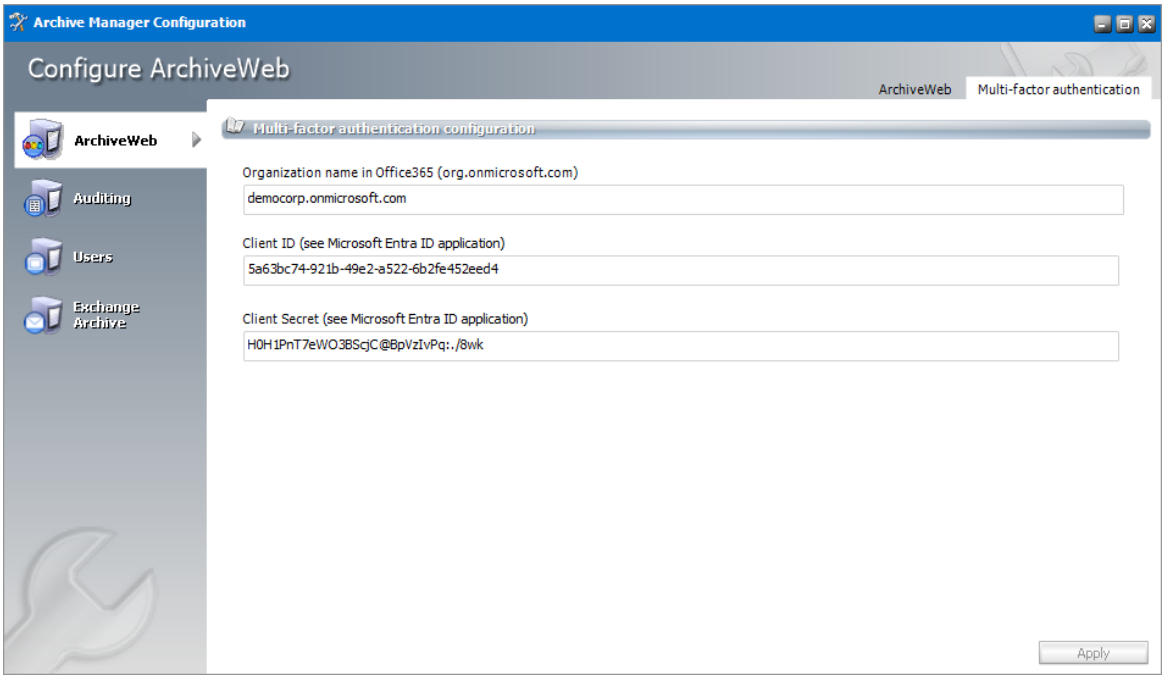
Configure ArchiveWeb with the Archive Manager Configuration tool

1. Open the *Archive Manager Configuration* tool from *C:\Program Files (x86)\Common Files\PAM\PAMConfig\PamConfig.exe*
2. From the sidebar, click **ArchiveWeb**.
3. Click the **ArchiveWeb** tab. The *ArchiveWeb Configuration* page appears.



4. Select **Use Multi-factor Authentication** to activate the fields in the *Multi-factor authentication Configuration* window.

5. Click the **Multi-factor authentication** tab. The *Multi-factor authentication Configuration* window appears.



6. 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 Microsoft Entra ID application registration steps.

c. **Client Secret** - enter the Client Secret that you saved from the Microsoft Entra ID 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.

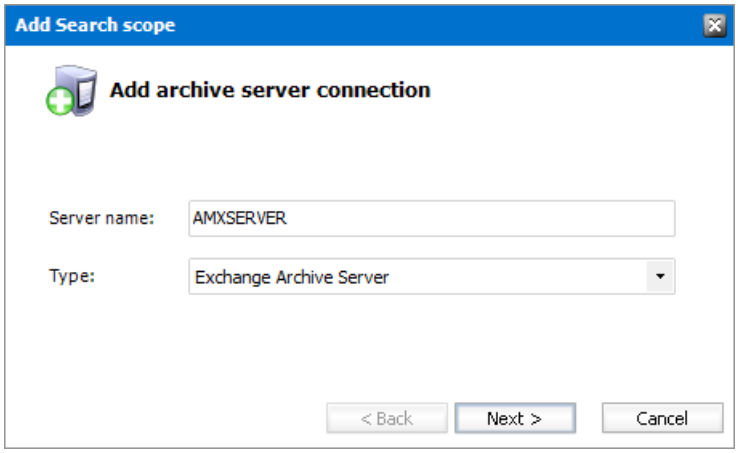
Search Scopes

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 add Search scopes

1. From the feature panel on the left in the *Archive Manager Configuration* wizard, click **Search** and select the **Search scopes** tab.
2. Click **Add**. The *Add Search scope* window opens.



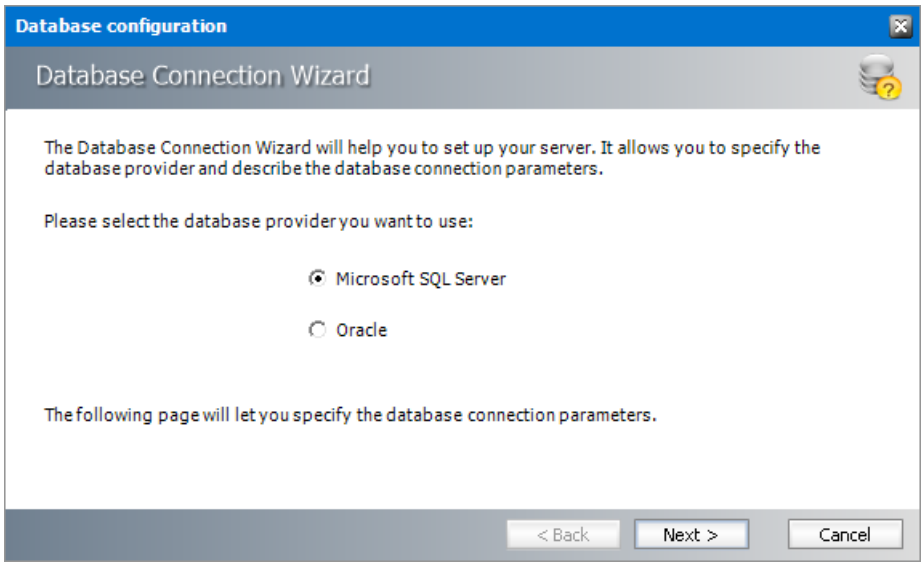
Enter the information and described below:

a. **Server name** - name of the primary Archive Manager for Exchange server (eg. AMXSERVER) where the role will be set to **Archive** server.

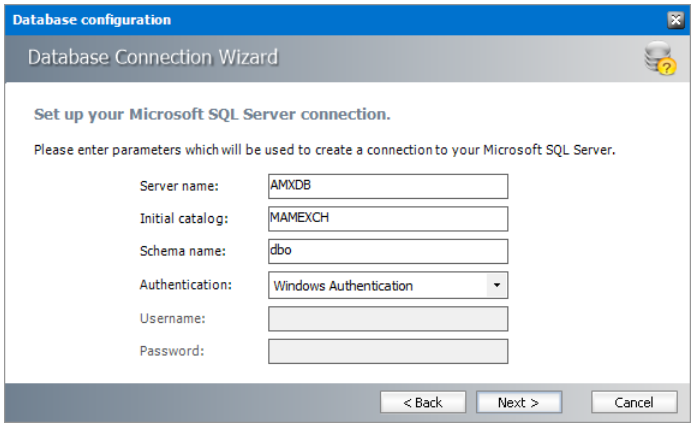
b. **Type** - Select Exchange Archive Server.

3. Click **Next**. The *Set up the Archive database connection* window opens.

4. If the database already exists, click **Import**. Otherwise click **Configure** to setup the Archive Manager for Exchange database. The *Database Connection* Wizard opens.



5. 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. **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. **Username** - database login username 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

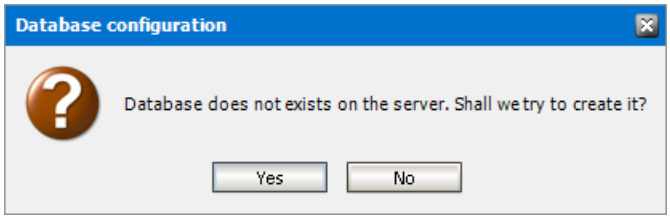
a. **Oracle net name** - net service name that describes the network address of the HSM database in your `tnsnames.ora` file (eg. **AMXDB**)

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)

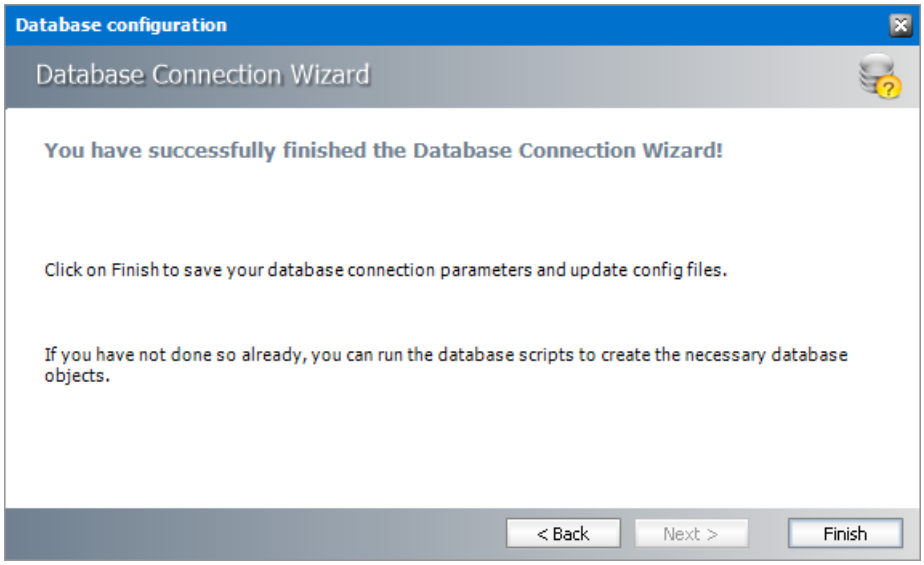
c. **Username** - database login username

d. **Password** - password of the database user

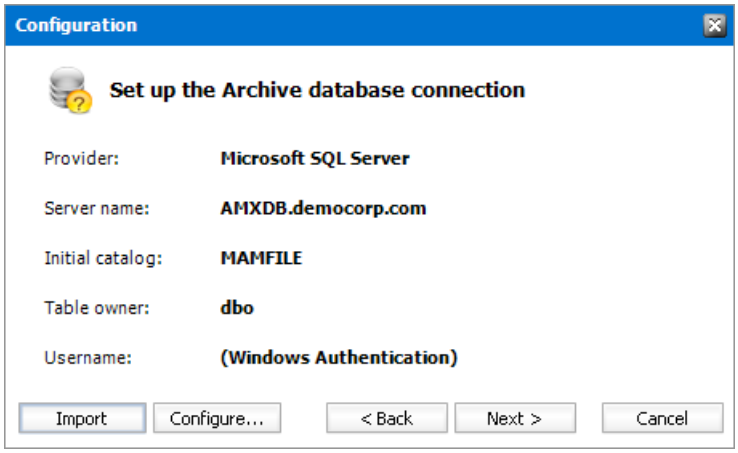
6. Click **Next** and then click **Yes** on the confirmation dialog that opens.



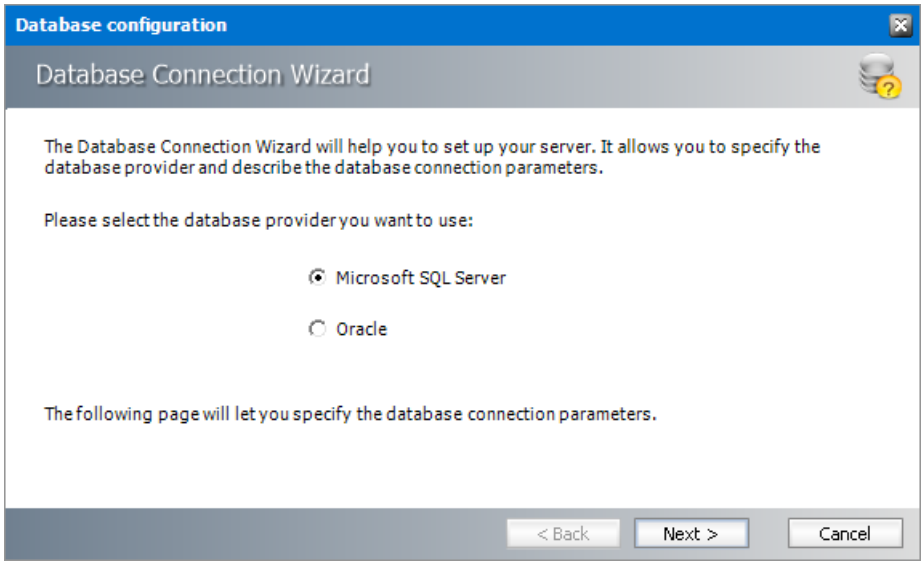
7. If the database connection is setup successfully, the configuration confirmation window opens.



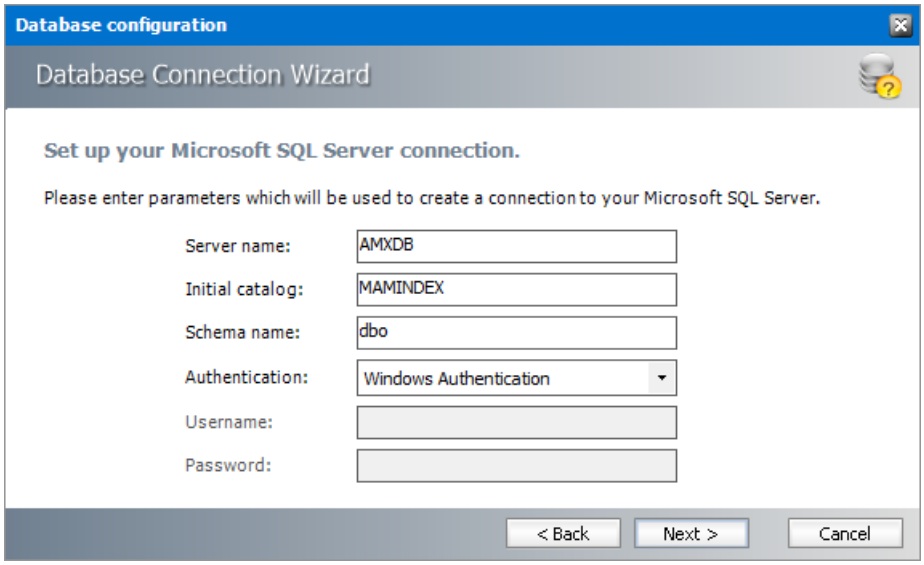
8. Click **Finish** to close the *Database Connection* wizard. The *Set up the Archive database connection* window reopens.



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



11. 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. **Username** - database login username 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

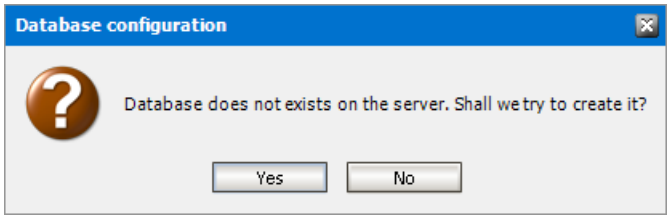
e. **Oracle net name** - net service name that describes the network address of the HSM database in your `tnsnames.ora` file (eg. **AMXDB**)

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)

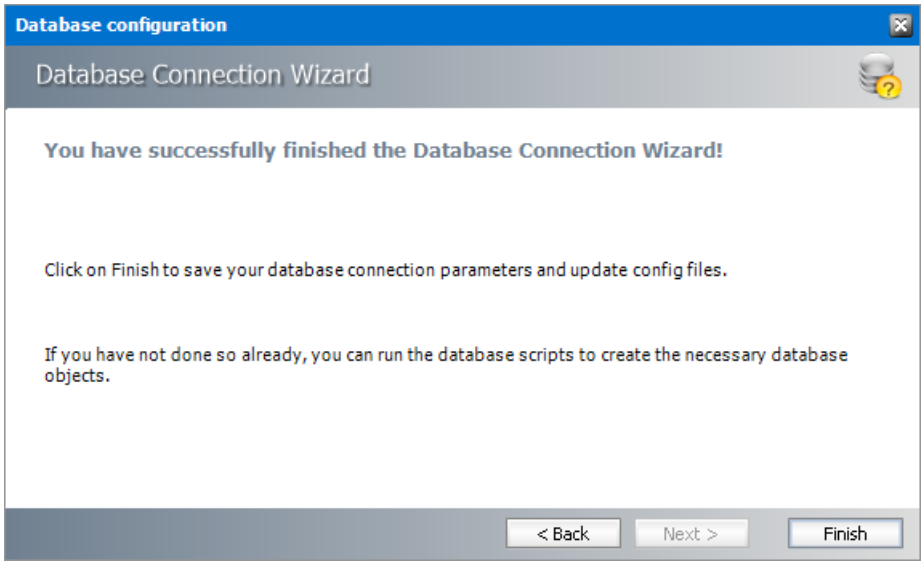
g. **Username** - database login username

h. **Password** - password of the database user

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

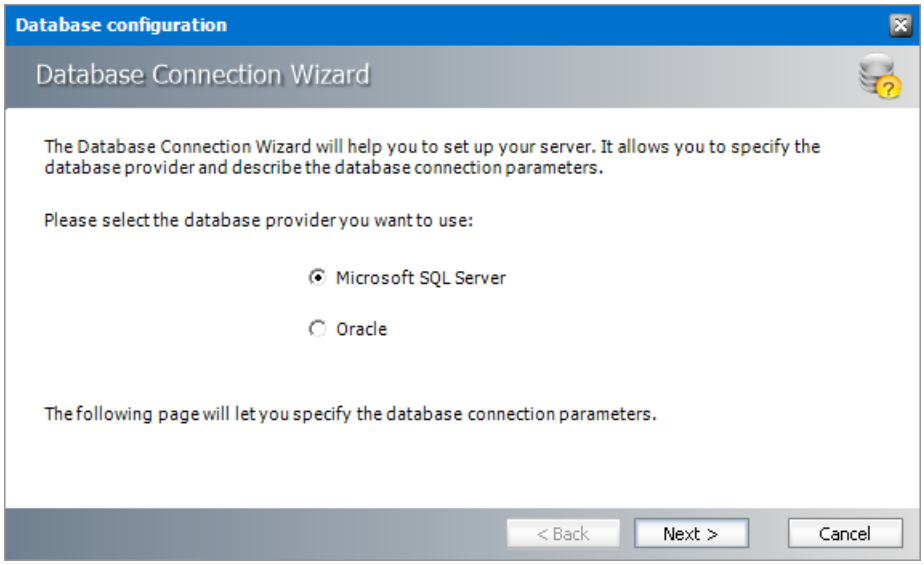


13. If the database connection is setup successfully, the configuration confirmation window opens.

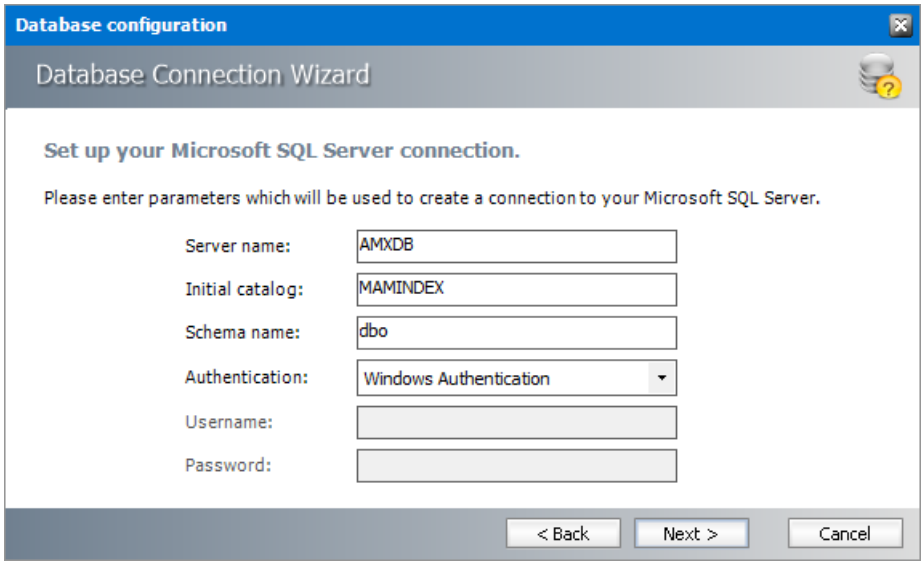


14. Click **Finish** to close the *Database Connection* wizard. The *Setup the Index database connection* window opens.

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. **Username** - database login username 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

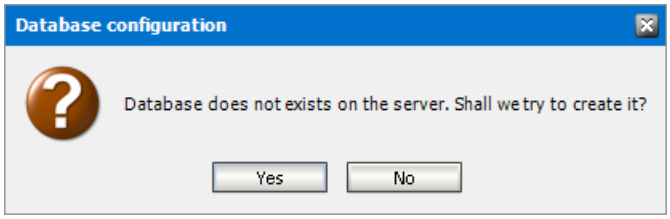
a. **Oracle net name** - net service name that describes the network address of the HSM database in your `tnsnames.ora` file (eg. **AMXDB**)

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)

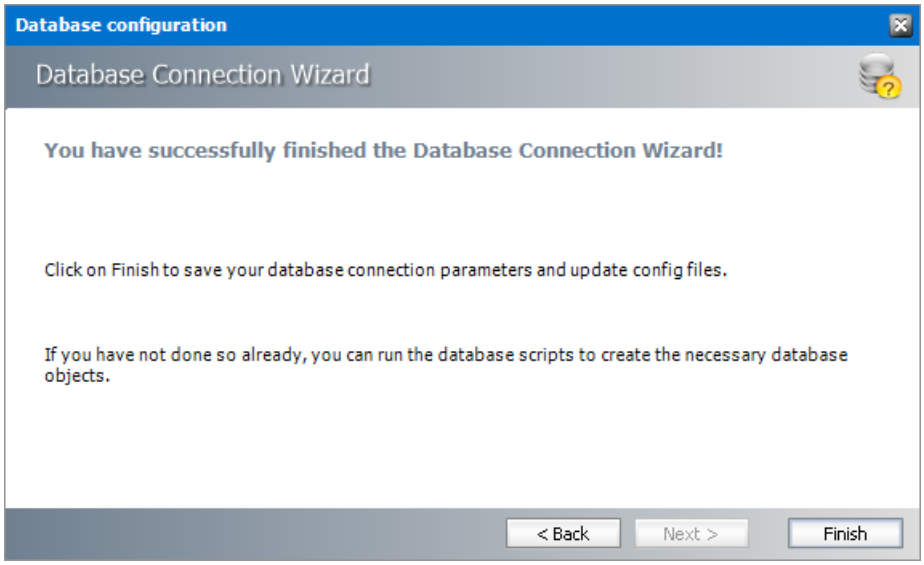
c. **Username** - database login username

d. **Password** - password of the database user

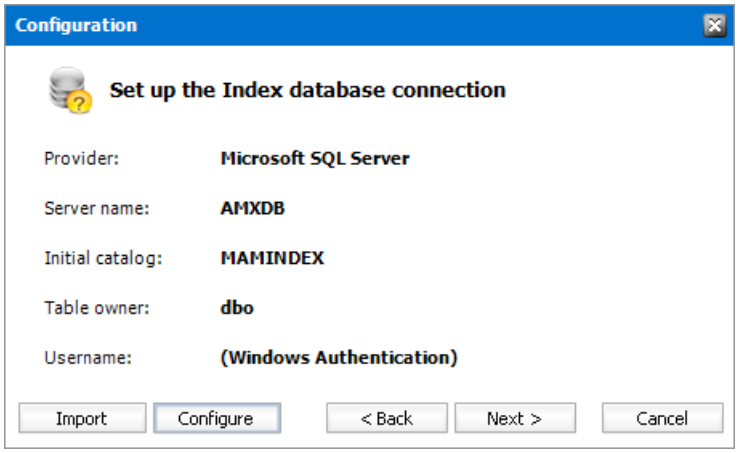
3. Click **Next** and then click **Yes** on the confirmation dialog that opens.



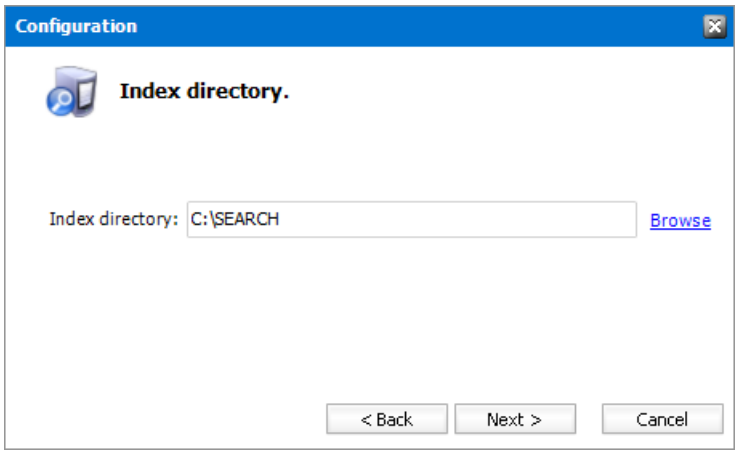
4. If the database connection is setup successfully, the configuration confirmation window opens.



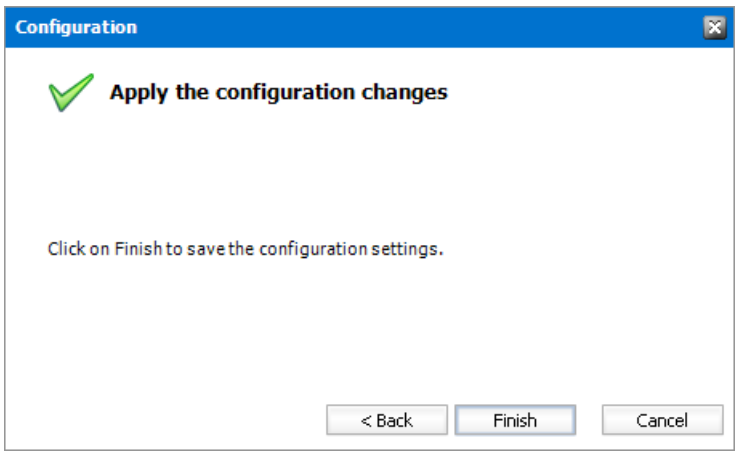
5. Click **Finish** to close the *Database Connection* wizard. The *Set up the Index database connection* window reopens.



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

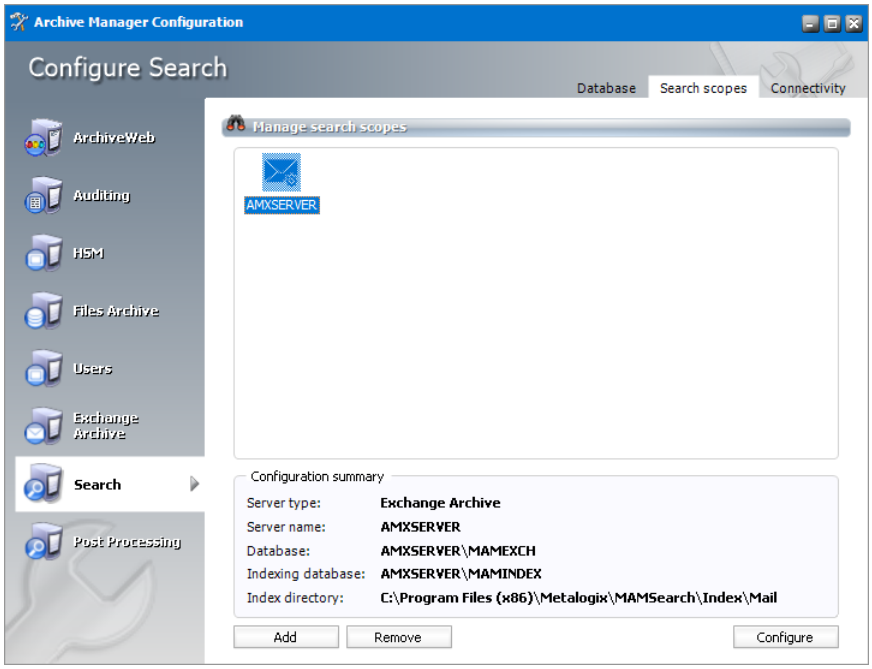


16. Click **Browse** to select or create a folder for the search index and then click **Next**. The *Apply the configuration changes* confirmation window opens.

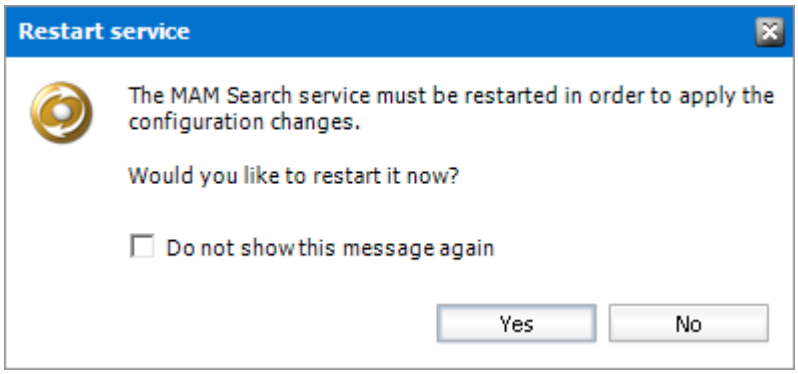


17. Click **Finish**. The Archive server for **Server type** = **Exchange Archive** is added to the *Manage search scopes* section. Click the icon for the Archive server that you added, and verify the information in the *Configuration summary* section.

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



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



19. Close the *Archive Manager 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.

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

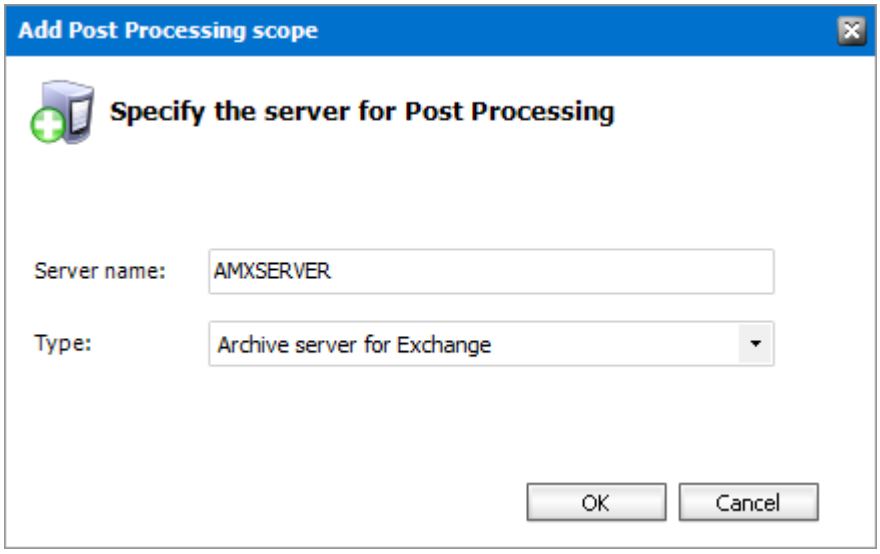
In this topic:

- Steps to add Post Processing scopes

- Steps to install the SearchIndexPluginRange
- Steps to configure a Plugin
- Steps to specify a bookmark date

Steps to add Post Processing scopes

1. From the feature panel on the left in the *Archive Manager Configuration* wizard, click **Search** and select the **Search scopes** tab.
2. Click **Add**. The *Add Post processing* scope window opens.



3. Enter the information and described below:
   - **Server name** - specify the name of the Archive Manager for Exchange server.
   - **Type** - select **Exchange Archive server**
4. Click **OK**.

To revise the configuration of an existing Post Processing scope, select the scope and click **Configure**. Then edit the information and click **OK**.

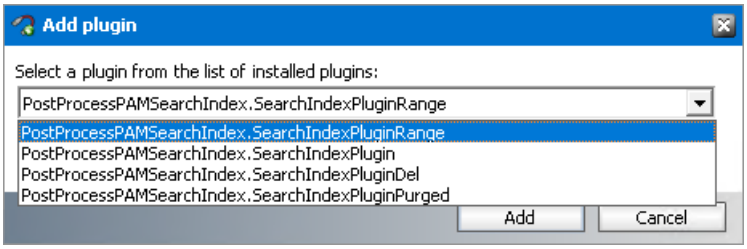
Post processing plugins

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 and configured. This plugin indexes mail recipients.

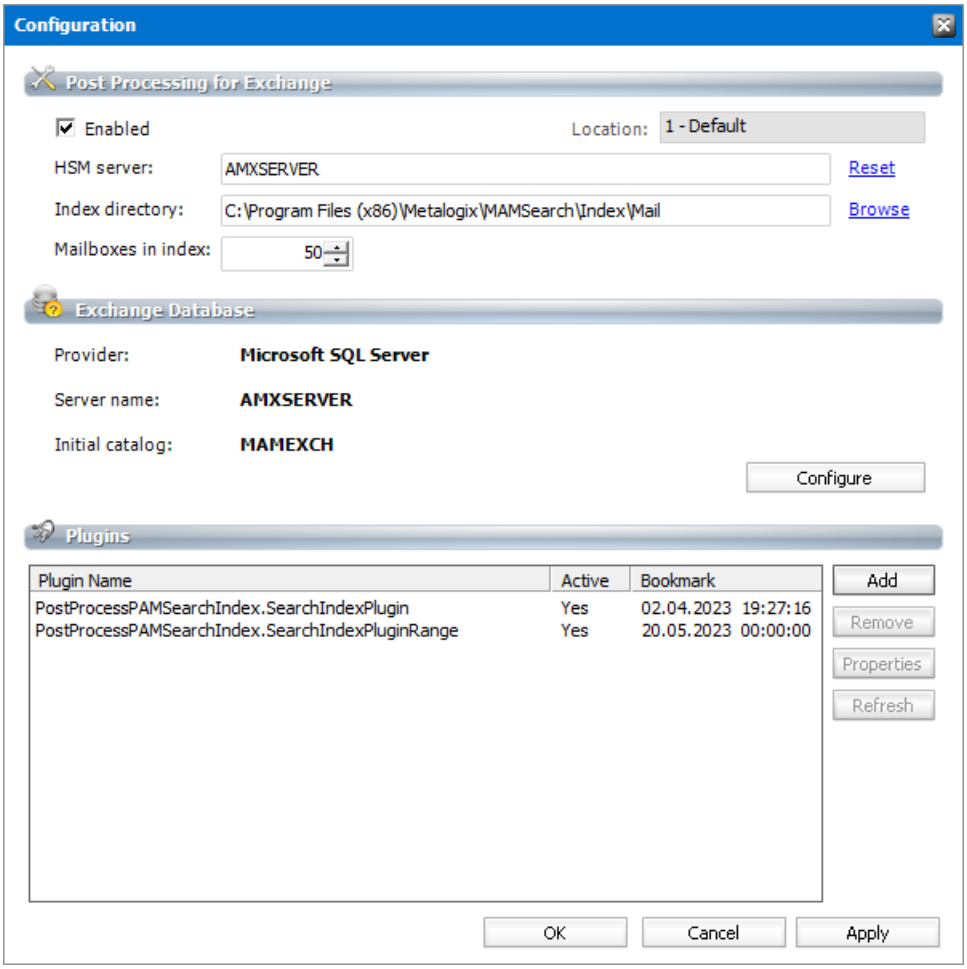
- Steps to install the SearchIndexPluginRange
- Steps to configure a Plugin

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**.



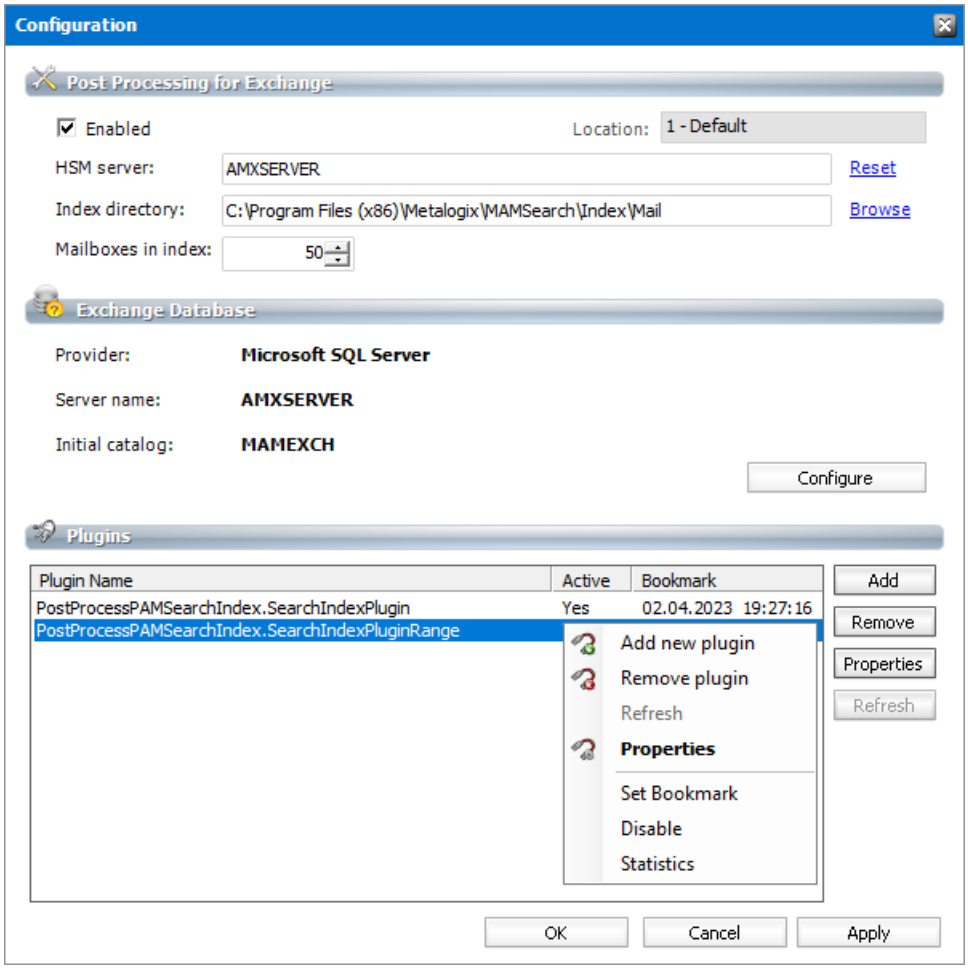
7. The plugin is listed in the *Plugins* list in *Configuration* tab. By default it is active.



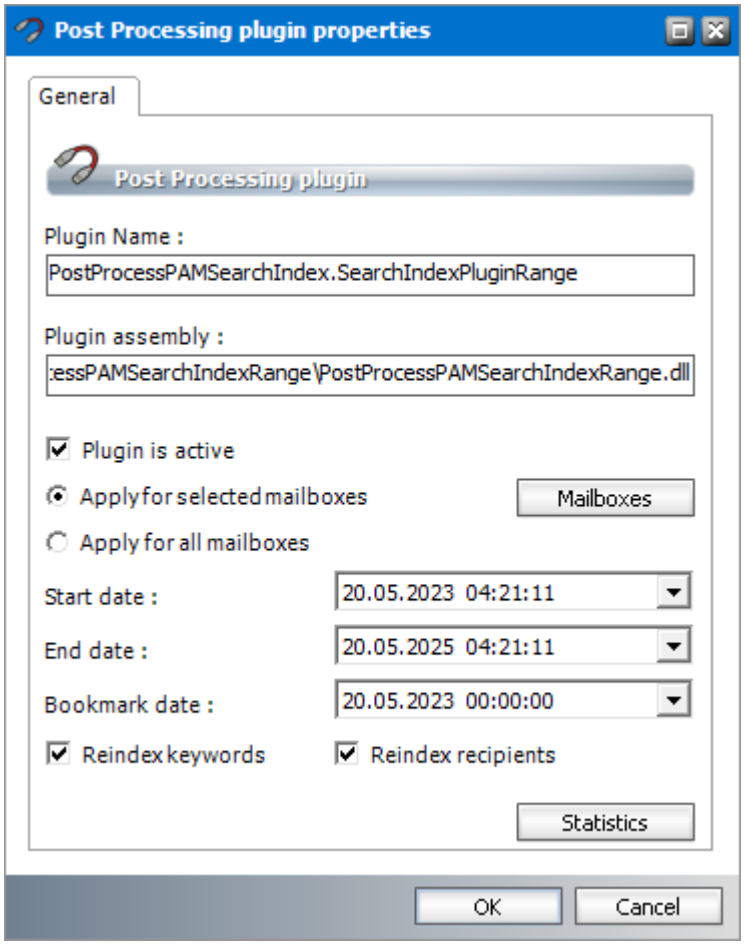
Steps to Configure a Plugin

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.



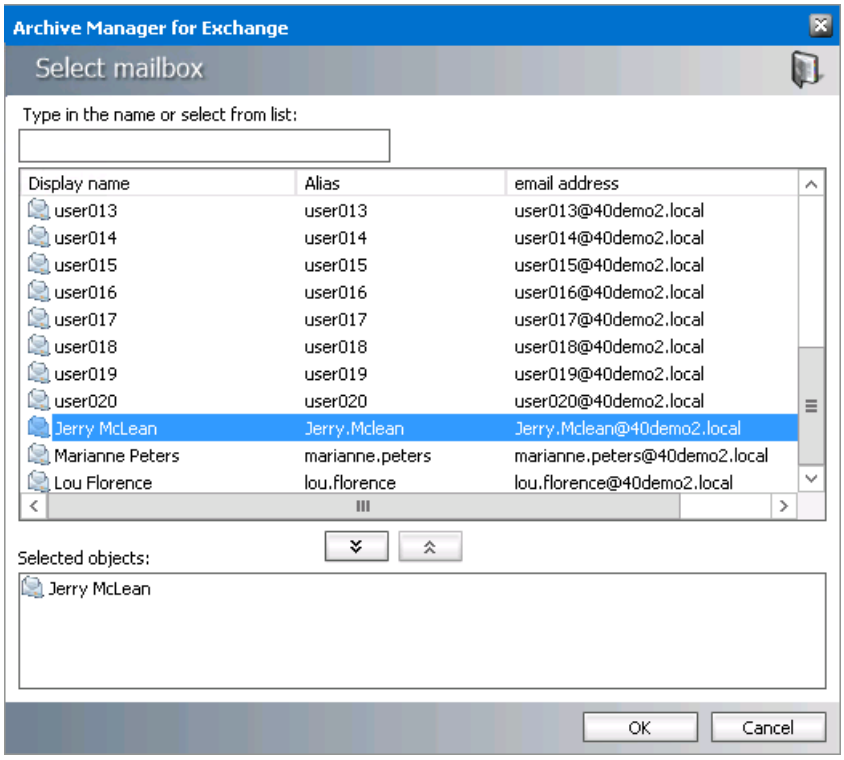
The plugin properties are as follows;

a. **Plugin is active** - select this checkbox to activate the plugin.

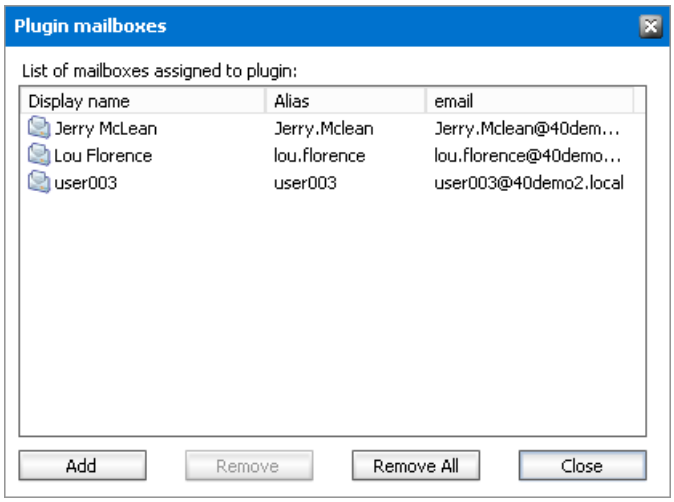
b. **Apply for selected mailboxes** - the plugin scope is determined by the mailboxes that you can select when you click **Mailboxes**.

   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**

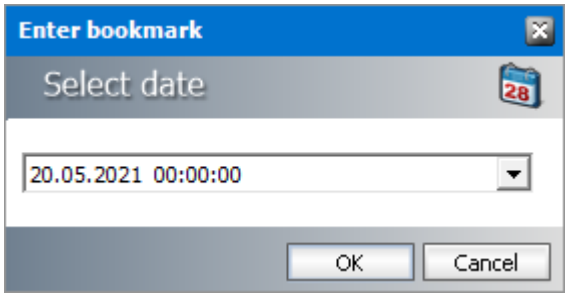
Date and the **Bookmark Date** to the same date in the past from where you would want the indexing to begin.

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 recipeinets 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**.



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 General Data Protection Regulation (GDPR) regulations.

Retention

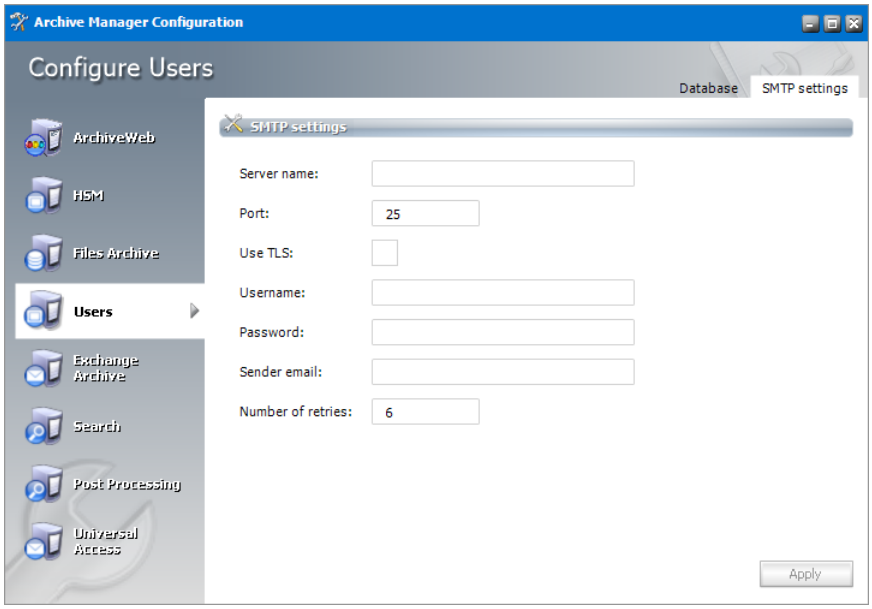
Users with the requisite permission can create a retention change request for archived Exchange and Files items from its context menu. When a request is created, approvers get an email notification and can review the request. Users who created a request are informed through an email notification once an approver has processed the request. Users and approvers can track the requests in ArchiveWeb from the Retention tab. Users and approvers can see open, approved, denied requests and request history. Additionally, approvers can export all items from a request to a ZIP file, deny the entire request and approve all or selected items from the request.

To use all retention features, a working SMTP server is needed, however SMTP is not mandatory for retention functionality. The SMTP service is used to send notification emails to approvers and retention requesters.

To setup the SMTP service (PamConfig)

A working SMTP server is needed to send notification emails to users. The SMTP server must be configured with the *Archive Manager Configuration Tool*.

1. Open Archive Manager Configuration Tool from <installdir>\ Program Files (x86) \ Common Files \ PAM \ PAMConfig \ PamConfig.exe.
2. From the feature panel on the left in the *Archive Manager Configuration* wizard, click **Users** and verify that the database and scripts are up to date from the **Database** tab.
3. Click the **SMTP Settings** tab.



Specify the information as described below

- **Server name** -specify SMTP server name or IP address where the SMTP server is installed.
- **Port** -specify the SMTP port.
- **Use TLS** - select this option if the SMTP requires TLS.
- **Username**, **Password** - specify SMTP credential. Username must be in the format domain/username.
- **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.

4. Click **Apply** and then close the window.

To grant permissions in ArchiveWeb

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

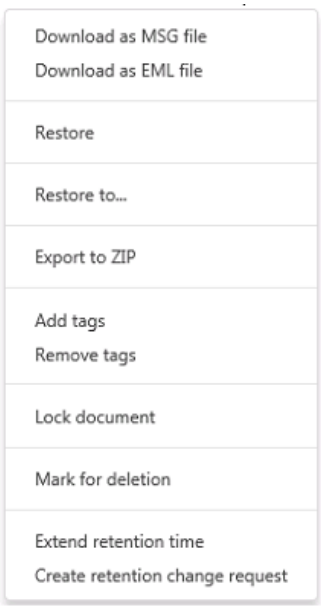
3. From the local toolbar, click **Permissions**.
4. Grant the permissions to users and approvers as indicated below. For detailed steps about granting permissions, see Permissions.

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.

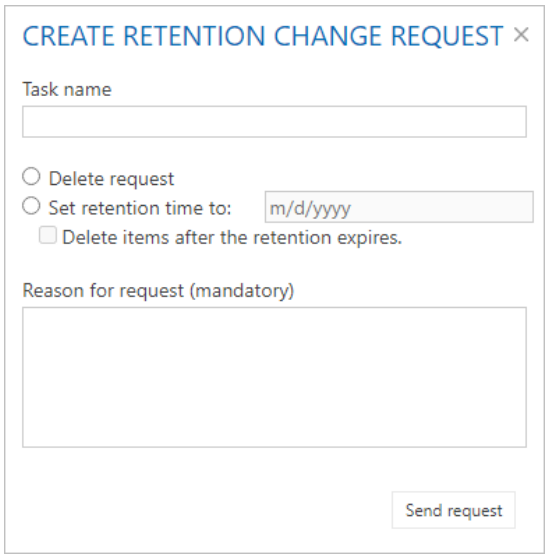
To create a retention change request

Users with the **Create retention change request** permission can create a retention change request from the context menu for selected item(s).

1. Log in to ArchiveWeb.
2. Click Archive from the main menu and select the **Exchange**.
3. Select one or more archived items.
4. For a single archived item
5. Click **Menu** in the preview pane and then select Log in to ArchiveWeb.



6. For selected items, the context menu appears automatically. Select **Create retention change request**.
7. The **Create Retention Change Request** dialog opens



8. Enter the information as described below:
   - **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
9. Click **Send request** to submit the request for approval. Newly created retention change requests appear in the **Open** and **History** lists in the **Retention** tab. Only items which have no Legal hold flag set will be added to retention change request.
10. If the SMTP service is configured correctly, a notification email is sent to approvers who have been granted the **Approve retention change requests** permission. A sample email is shown below.

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

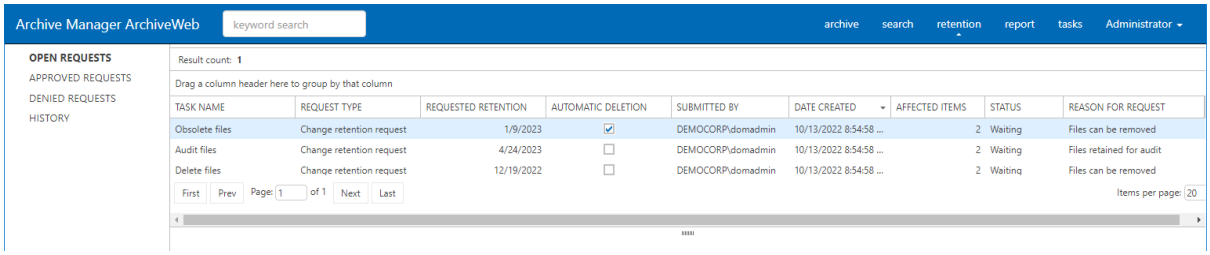
Please Log in ArchiveWeb and review the request.

Thank you.
DEVX\testuser1

Retention tab

This menu option is available to all users with either the **Create retention change request** or **Approve retention change requests** permissions. The user can see list of open, approved, denied requests and history.

OPEN REQUESTS



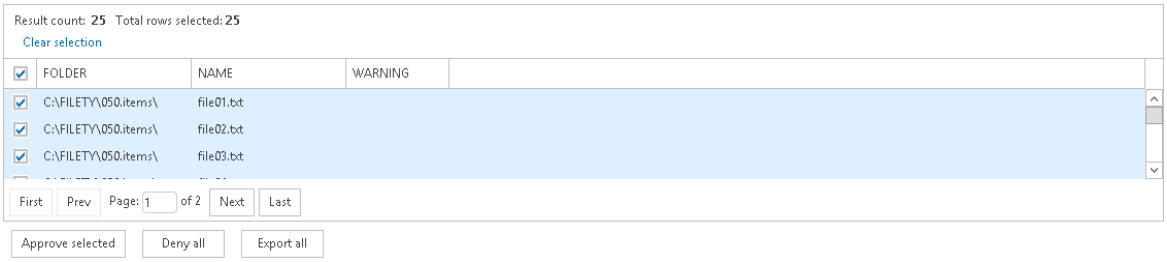
Displays all requests that are created but have not been approved or denied. Click any request to view the items included in the request in the preview pane. The columns are described below:

Column	Description
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

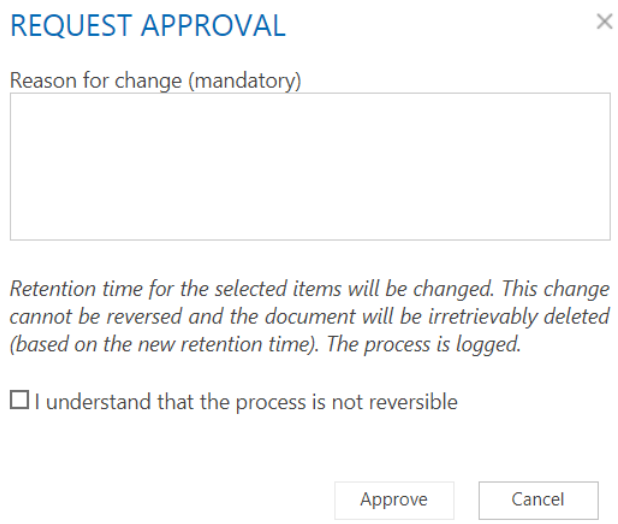
Processed by	Name of the user who approved/denied the request
Date processed	Date-time when the request was approved/denied
Submitted items	Number of items in submitted request
Status	Request task's status
Reason	Approve/Denied reason
Reason for request	Reason the submitter entered

To approve a request

1. Click the **Retention** tab and then click **Open Requests**.
2. Select a request to view the items included in the request. Select ore or more items or select the checkbox in the column header to select all items.

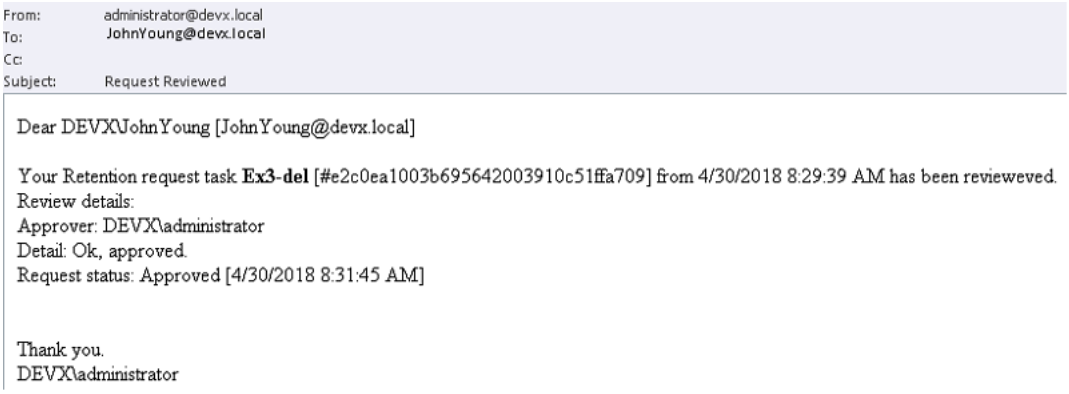


3. Click **Approve selected**. The *Request Approval* dialog opens.



- **Reason for change** - enter text to explain why the change is necessary.
- **I understand that the process is not reversible** - select this checkbox to confirm the approval

4. Click **Approve. T**he selected items will be asynchronously processed and their retention settings will be changed.
5. If SMTP is correctly set up, the requester will be informed through email. A sample notification email is shown below:



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

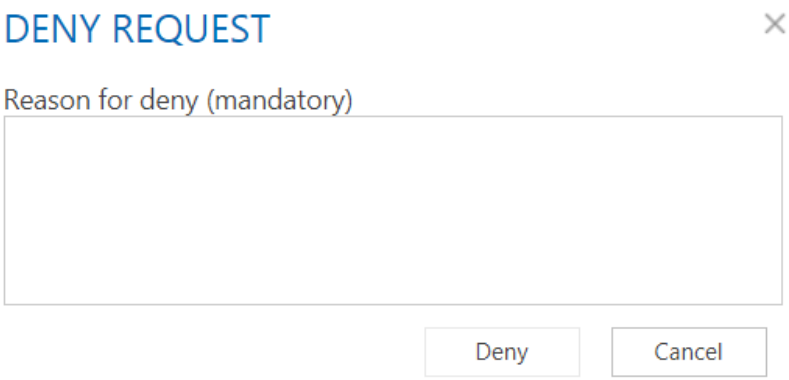
Dear DEVX\JohnYoung [JohnYoung@devx.local]

Your Retention request task **Ex3-del** [#e2c0ea1003b6956420039l0c51ffa709] from 4/30/2018 8:29:39 AM has been revieweved.
Review details:
Approver: DEVX\administrator
Detail: Ok, approved.
Request status: Approved [4/30/2018 8:31:45 AM]

Thank you.
DEVX\administrator

To deny a request

1. Click the **Retention** tab and then click **Open Requests**.
2. Select a request to view the items included in the request. All items will be included for denial.
3. Click **Deny all**. The *Deny Request* dialog opens.

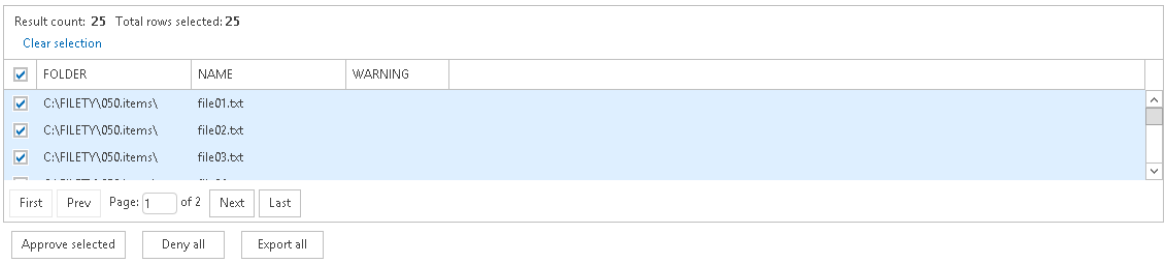


- **Reason for deny** - enter text to explain why the request is being denied.

4. Click **Deny**. All items will be denied. No operation from retention change request will be processed.
5. If SMTP is correctly set up, the requester will be informed through email. A sample notification email is shown below:

To export items

1. Click the **Retention** tab and then click **Open Requests**.
2. Select a request to view the items included in the request. Select ore or more items or select the checkbox in the column header to select all items.



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

APPROVED REQUESTS

Displays all requests that are approved. Click any request to view the items included in the request in the preview pane. The columns are described below:

Column	Description
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
Affected items	Number of items approved
Status	Request task's status.
Reason	Reason for approval

DENIED REQUESTS

Displays all requests that are approved. The columns are described below:

Column	Description
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 denied the request
Date processed	Date-time when the request was denied
Affected items	Number of items that were denied
Status	Request task's status
Reason	Reason for denial

HISTORY

Display the list of all requests (open, approved and denied). The columns are described below:

Column	**Description**
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 denied the request
Date processed	Date-time when the request was denied
Affected items	Number of items that were denied
Status	Request task's status
Reason for Request	Reason for approval or denial

Select any request in the **History** view to see the affected items in the preview pane. The columns are as described below:

From	Sender's name
To	Recipient(s) names
Subject	Subject of the item
Approved	Indicates whether the item was approved
Error	Contains error message, if any

The preview pane in the History view contains two predefined filters:

- **Processed** – contains list of processed items.
    - For **Change retention request** – items with selected checkboxes in the **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 checkboxes in the **Approved** column have been processed by a *Delete* job, and items have been deleted; if error occurred the **Error** column will contain a message.
- **Waiting** – contains list of items waiting to be processed.
    - For **Delete request** – items with selected checkboxes in the **Approved** column are waiting for a *Delete* job to process the items.

5

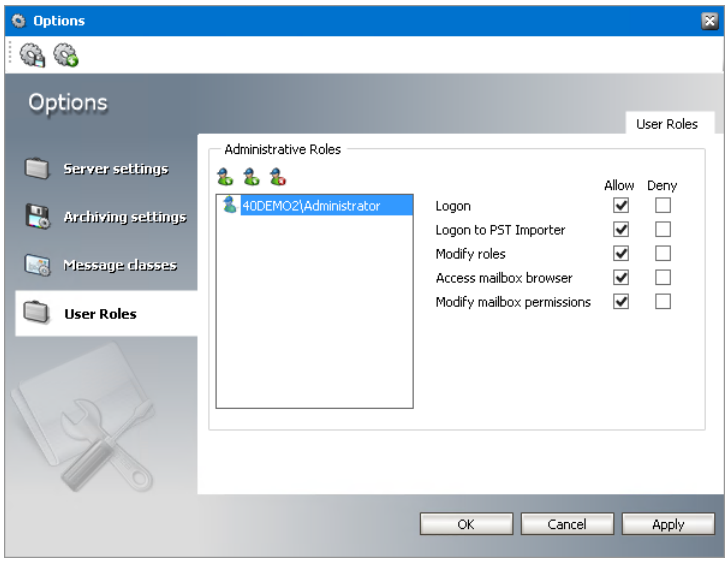
ArchiveWeb Settings

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

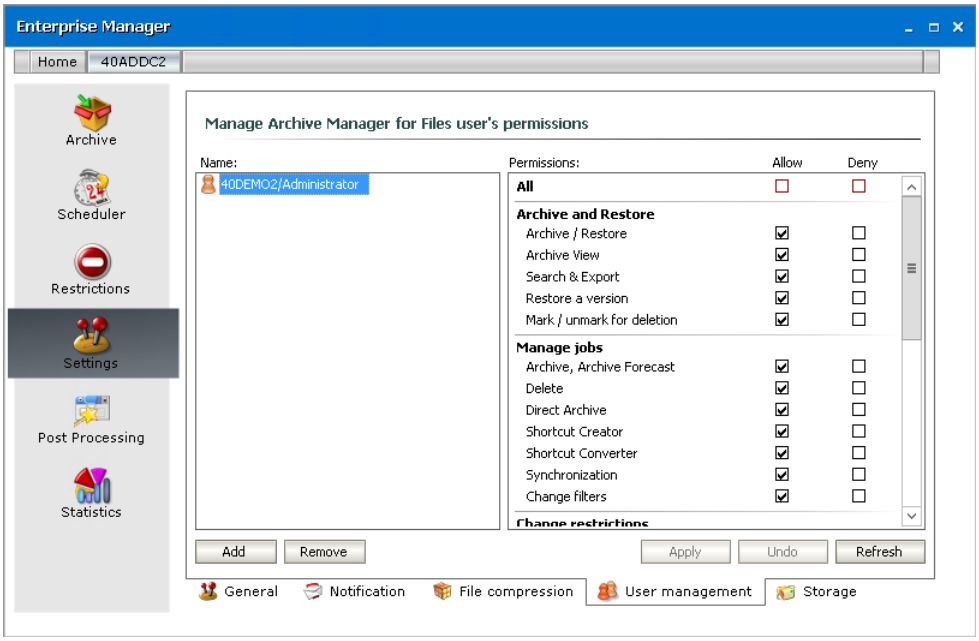
Please note: Super-user is specified in:

- 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**.

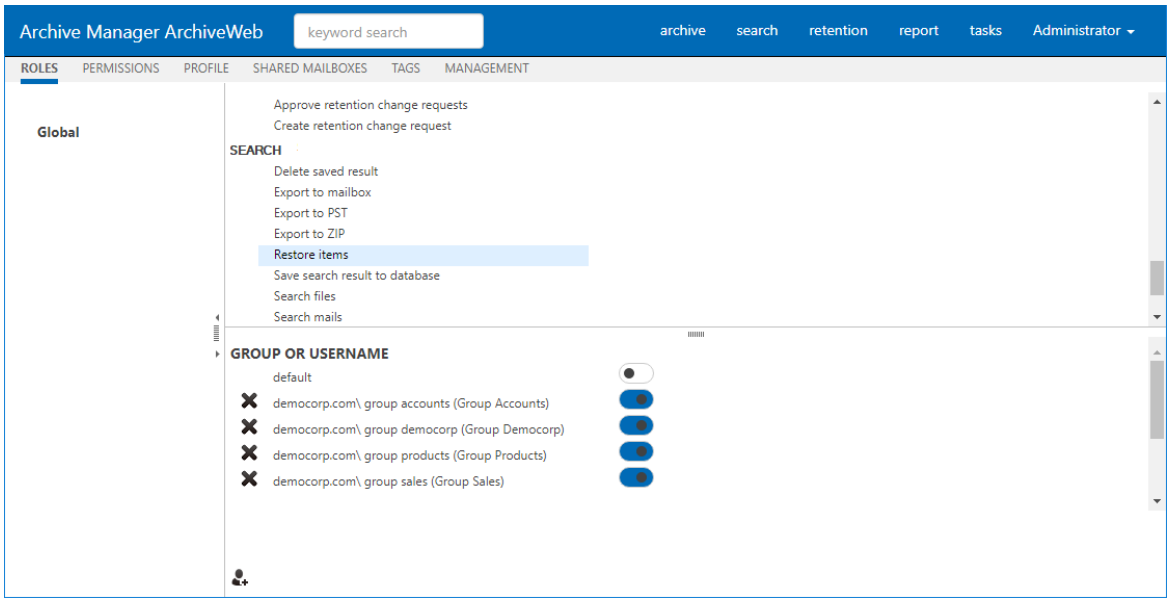
Steps to grant a permission to users or groups:

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 a group or user name in the search field. You can use the asterisk (*) as a wildcard in the search criteria or leave the field blank to include all entities. Users can be searched by user-name, logon-name or display-name. 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 ✖ 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.

In this topic:

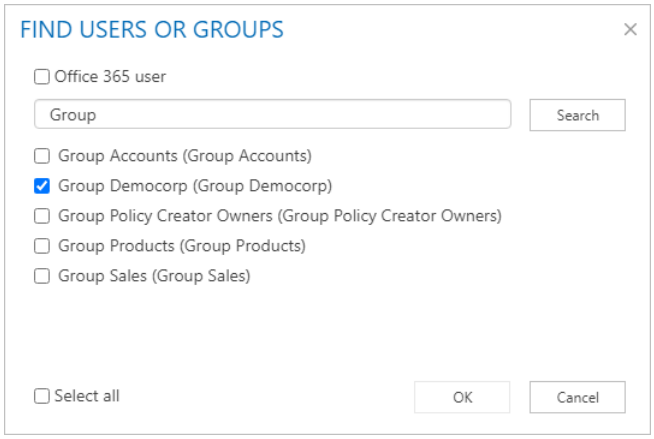
- Opening the Permissions page
- Adding users or groups
- Removing users or groups
- Synchronizing groups and sub-groups
- Viewing group members
- Granting permissions to users or groups

To open 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**.

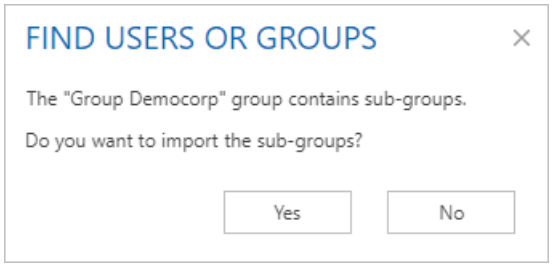
To add users or groups:

1. Click in the left-hand pane.
2. In the *Find Users or Groups* window, enter a group or user name in the search field. You can use the asterisk (*) as a wildcard in the search criteria or leave the field blank to include all entities. Users can be searched by user-name, logon-name or display-name. To search for Microsoft 365 users, select **Office 365 user** and then search for the user.



NOTE: Microsoft 365 users, groups and subgroups 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.
4. Click **OK** to add the selected users and groups to the *Permissions* page. The user of group will remain on the *Permissions* page if a permission of the user or group is modified in the current ArchiveWeb session.
5. If a group has subgroups a confirmation window opens. Select **Yes** to add the subgroup. Only subgroups of the parent group will be added. If a subgroup has more subgroups, they will not be added. Select **No** to ignore the subgroup and add the parent group only.

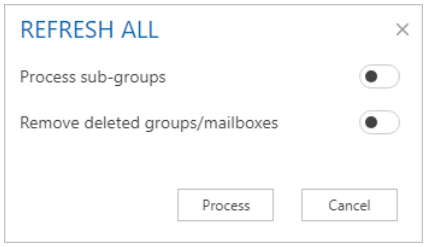


To remove users or groups:

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 if a permission of the user or group has been modified in the current ArchiveWeb session.
3. Click **OK**.

To synchronize groups and sub-groups:

1. Click **Refresh All** in the left pane. The *Refresh* window opens.



2. Click the toggle buttons to enable additional synch features as described below:

   a. <No toggle button enabled> - all imported groups will be synchronized with the Active Directory (only content in the right-hand pane will be updated).

   b. **Process sub-groups** - all imported groups will be synchronized with the Active Directory and new subgroups will be imported.

   c. **Remove deleted groups/mailboxes** - all imported groups will be synchronized with the Active Directory and deleted groups or mailboxes will be removed from the left-hand pane.

3. Click **Process** to begin the sync process.

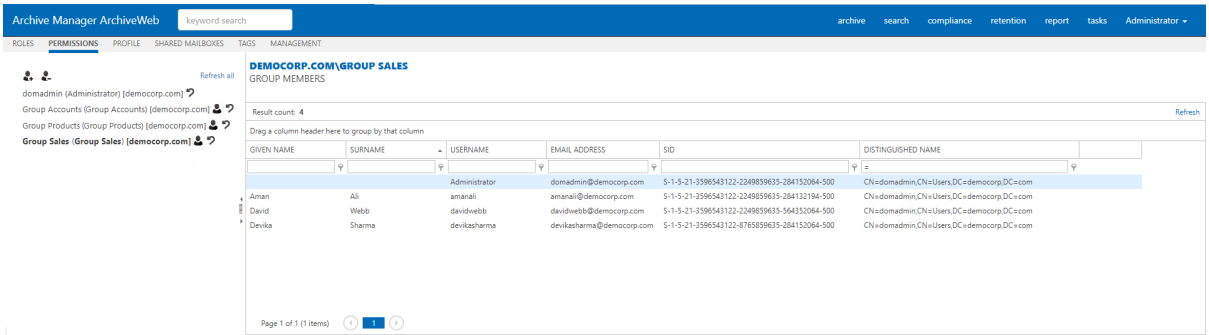
To view group members:

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.

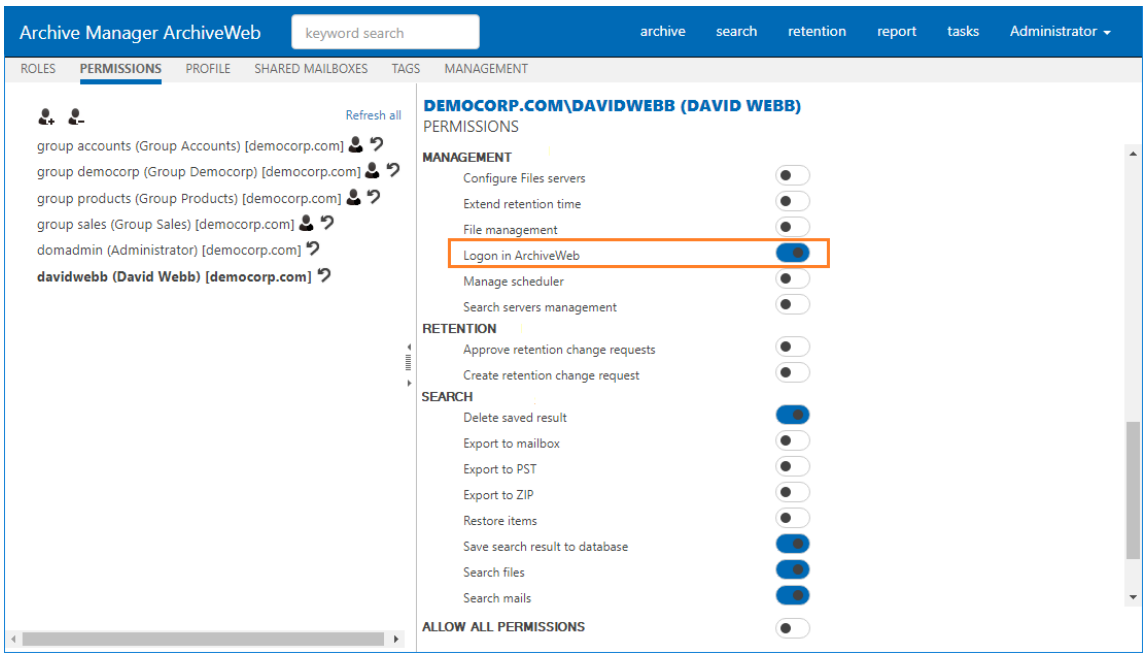
3. Click **Refresh** to get the latest list of members if users or subgroups are added or removed from the group in active directory while you are logged in to ArchiveWeb. If users or groups are added or removed, a confirmation window opens. Click **Yes** to confirm whether you want to add or remove a user or subgroup.

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.



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.

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**
Delete files	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
Logon in ArchiveWeb	**Allowed**
Manage scheduler	Denied
Search servers management	**Allowed**
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 able to specify the username 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 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**. Then select the **Permissions** tab.
3. Click the **Add User** icon and locate the user from the **Find Users or Groups** search window.
4. Select the user from the user list on the left to display the permission set in the right-hand pane.
5. Set the toggle switch to to grant the **Auditor access** permission to the user.

   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.

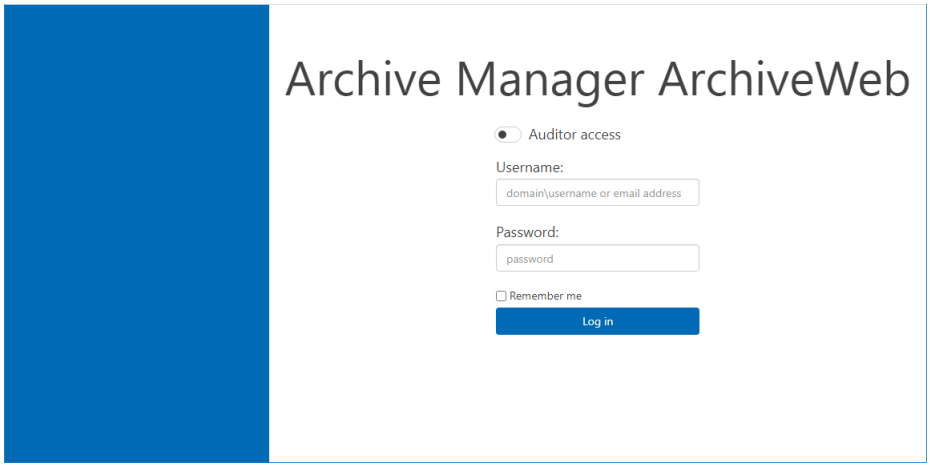
6. In the confirmation dialog that appears, click **Yes** to grant the **Auditor access** permission.

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

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

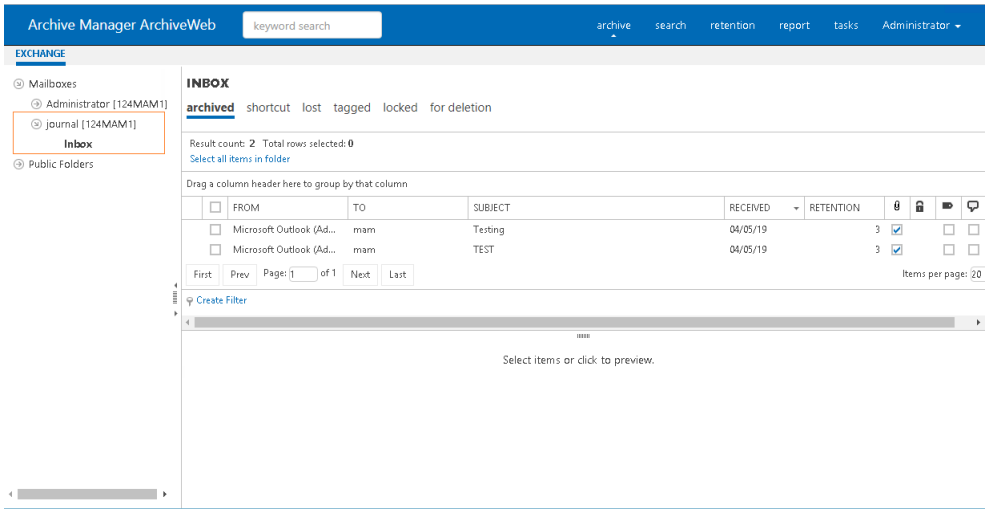
Steps to log in as an auditor

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



4. Enter the username of another user who has the **Auditor access** permission in the format *domain\username*.

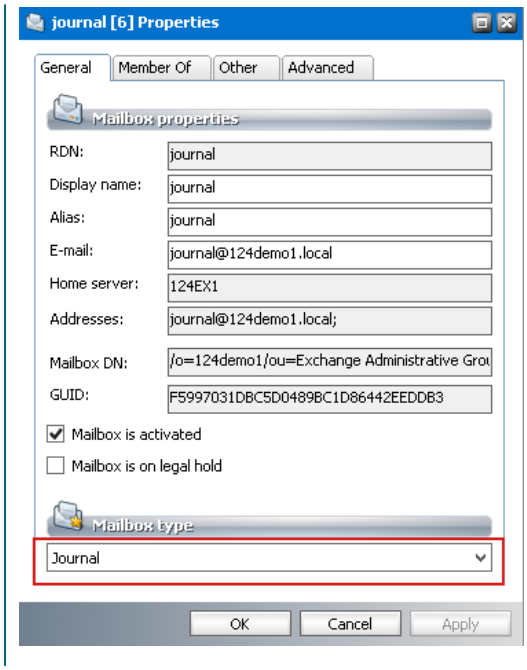
5. Click **Log in** again.
6. If the two-user authentication succeeds, the Archive Manager workspace appears.
7. From the top bar, click **archive** to open the archive view.
8. Click the **Exchange** tab.
9. Expand the **Mailboxes** node and select a journal to view its contents.



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.

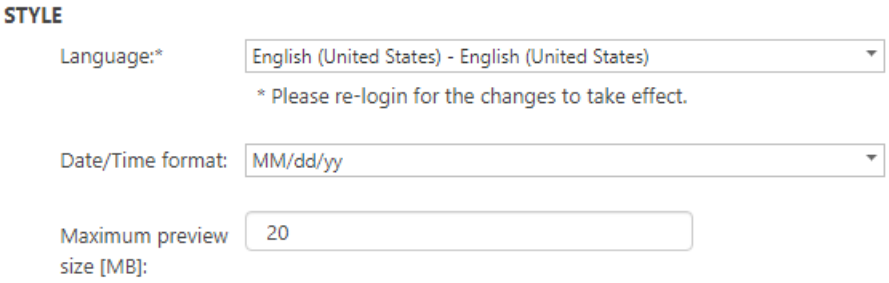
To reset a profile:

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

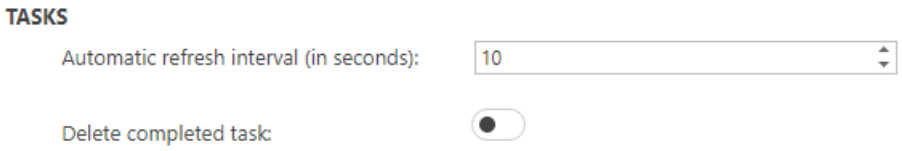
Under the Home Page node select which page should be displayed after you log in to ArchiveWeb.

Style settings



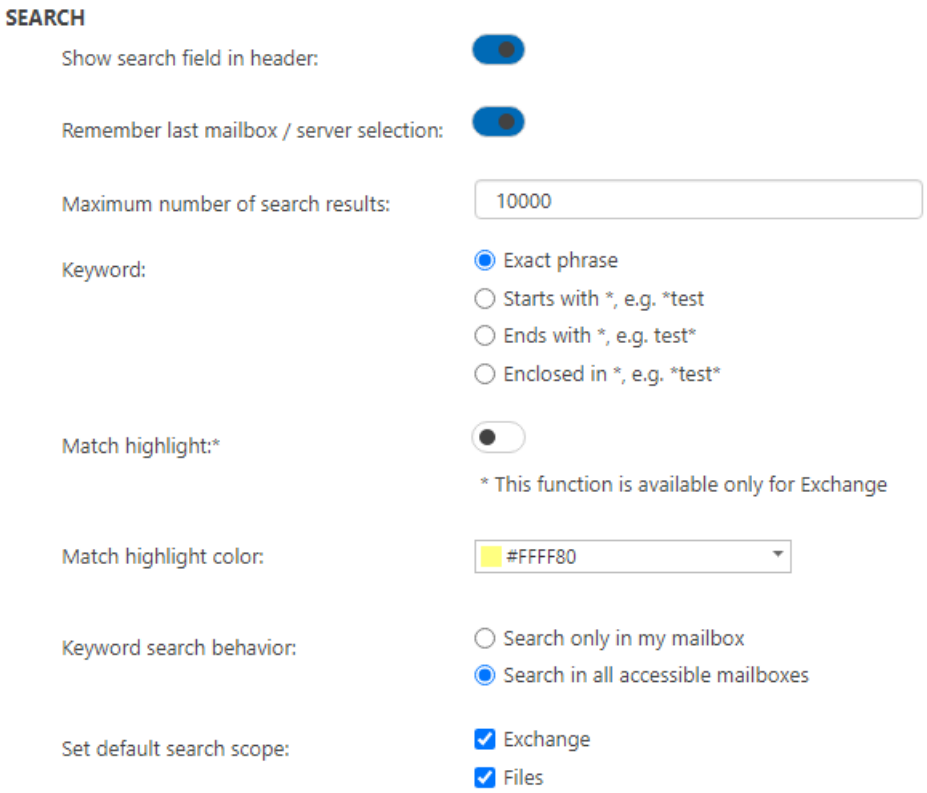
- **Language** - select the language for the application. The default language depends on the Windows local setting of the Archive Manager server. If you change this setting, you must log out and log in again.
- **Date/Time format** - select your preferred date and time format. The default value depends 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



- **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



- **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)\Quest\ArchiveWeb`.

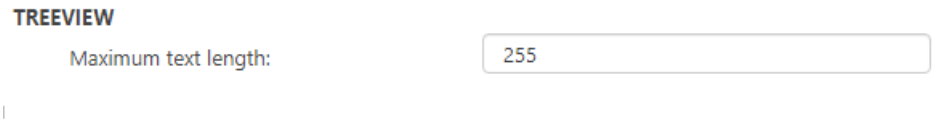
```
<appSettings>
    ...
    ...
   <add key="ShowTopSearchPanel" value="false"/>
</appSettings>
```

  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 *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 *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 *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 *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 *Archive Manager for Exchange* is installed.
  - **Files** - allows you to search in archived files. Available if *Archive Manager for Files* is installed.

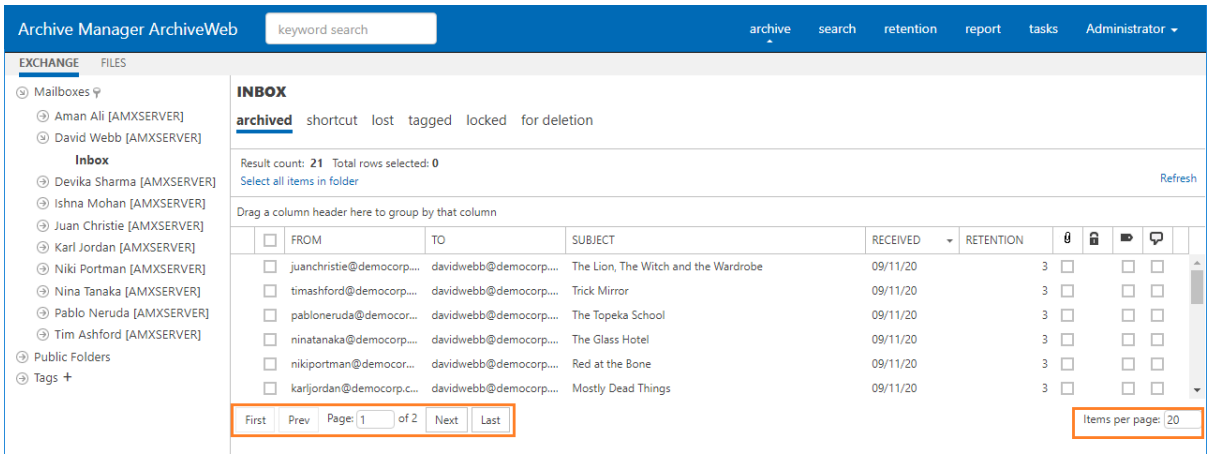
Treeview settings



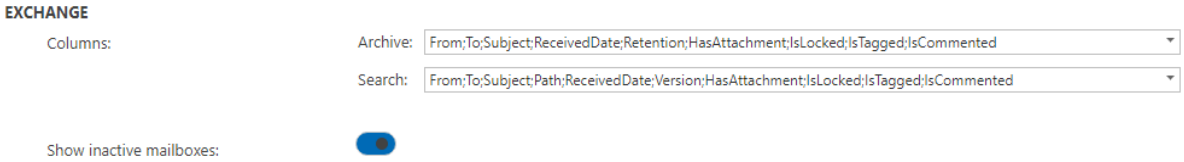
Maximum text length - the Treeview's node text will be trimmed to the number of characters specified.

Grid settings

- **Journal highlight color** - choose a color from the color picker control to highlight the journal items.
- **Items per page** - sets the number of items to be displayed per page.



Exchange settings



- **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)\Quest\ArchiveWeb`.

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

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

Audit settings

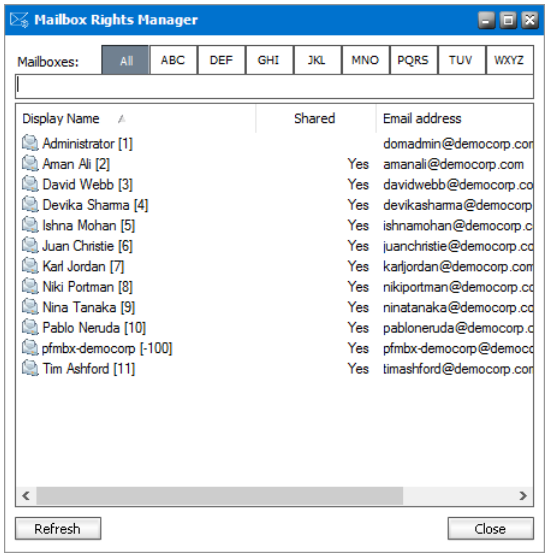
- **Columns** - sets the columns and the order that they are displayed in a list.
  - **Report** - these column headers are used in the Archive page: *Select All, Log level, Log date, Method, Computer, User, Category, Tagged*

Shared Mailboxes

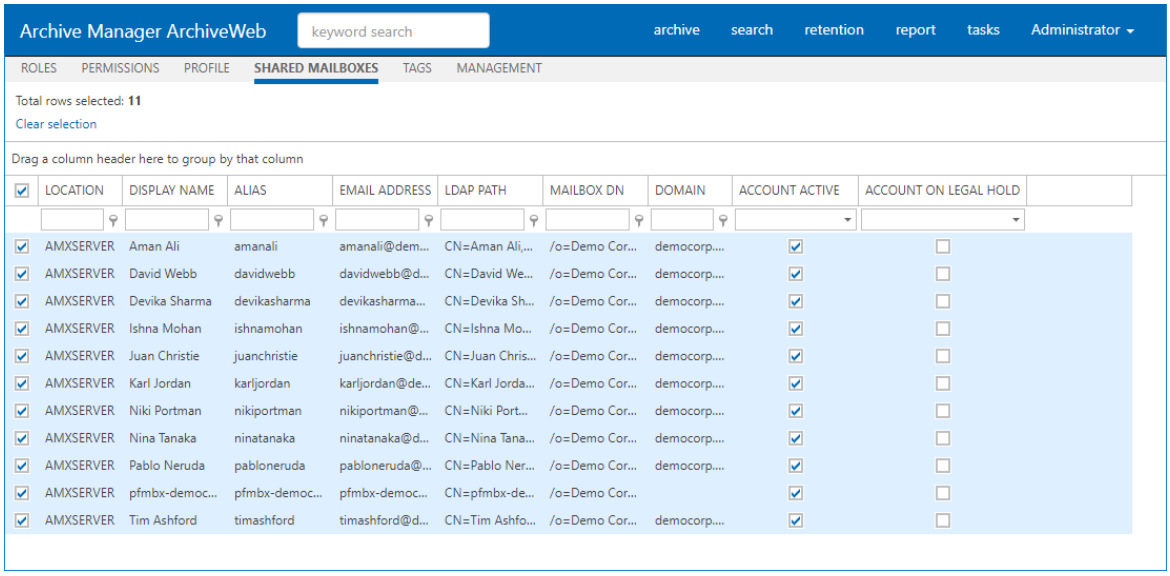
This management setting is available only when Archive Manager for Exchange is installed and configured for ArchiveWeb.

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.

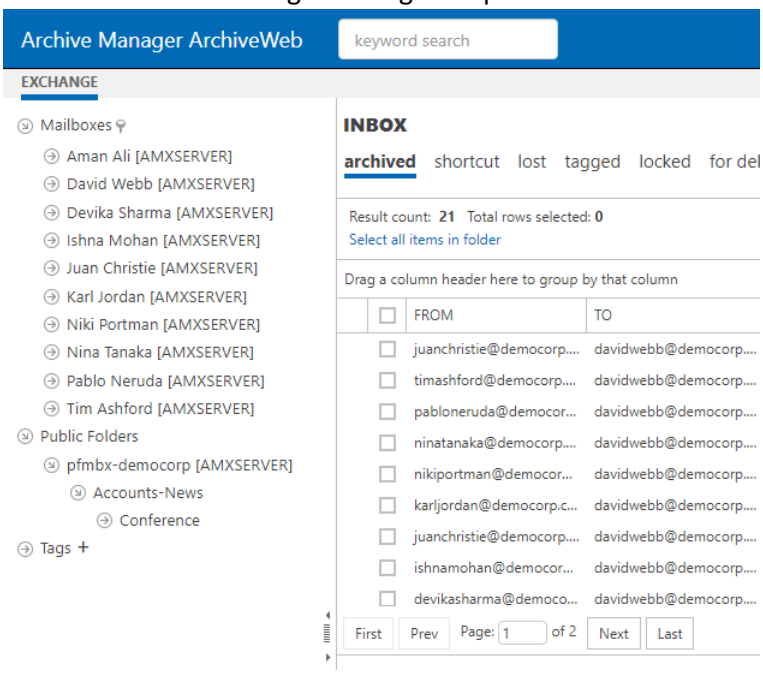


3. Log in to ArchiveWeb.
4. From the main menu, click the username dropdown and then select **Manage settings**.
5. From the local toolbar, click **Shared Mailboxes** and verify that you can see the mailboxes of the users that have been shared with you. For example, the image below lists all the mailboxes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



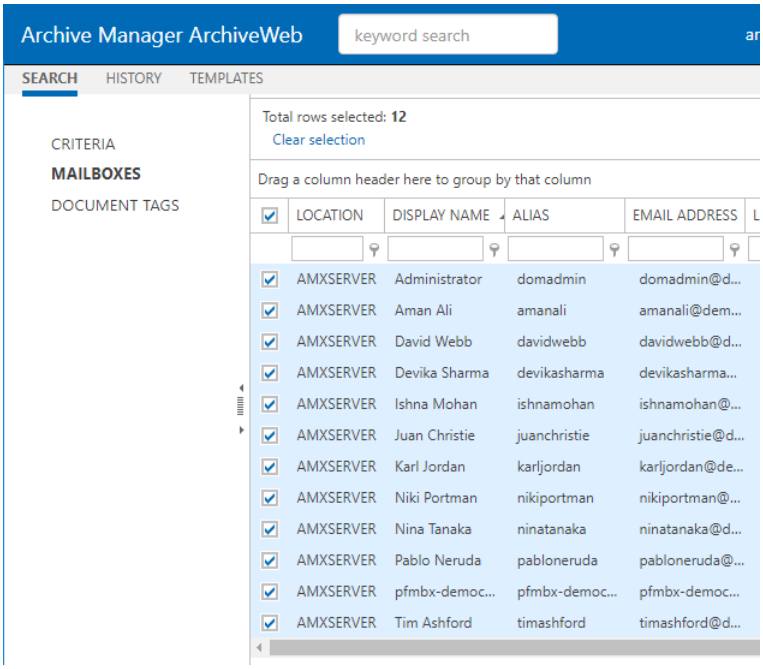
6. By default all mailboxes are selected. When there are a large number of mailboxes that are shared, you can select only those mailboxes that you want to see in other sections of ArchiveWeb. You can use the column filters to search for mailboxes. This makes it easier to manage mailboxes in other sections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

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



   - 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.



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:

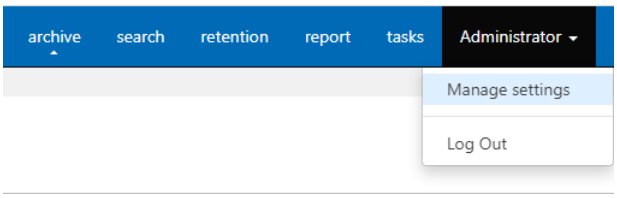
- Steps to create a tag
- Steps to edit a tag
- Steps to delete a tag
- Steps to add tags to items

Steps to create a tab

Tags can be created in several ways.

Create a tab from the Tags tab

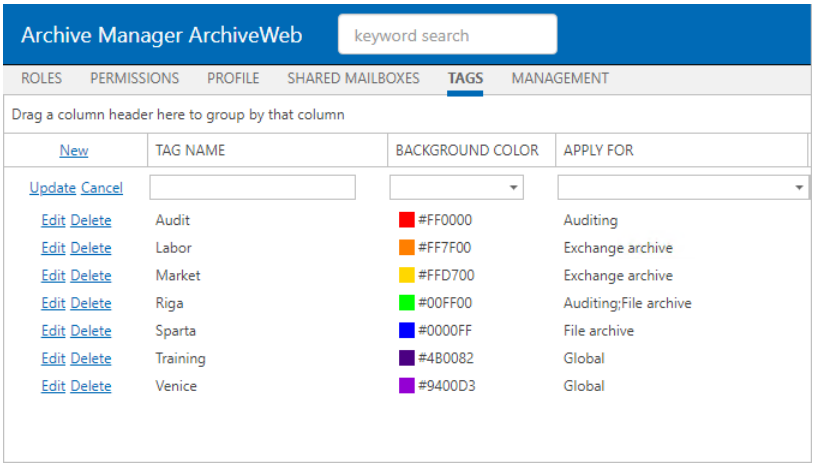
1. Log in to ArchiveWeb. Then click your user display name and select **Manage Settings**.



2. Click **Tags** from the local menu bar. All tags are listed, added, edited or deleted here.

> **NOTE:** Managing **Tags** from the Settings view requires special permissions. For more information see Roles and Permissions.

3. Click **New** in the list header. A new row will be added to the list view. Enter the tag properties as described below:



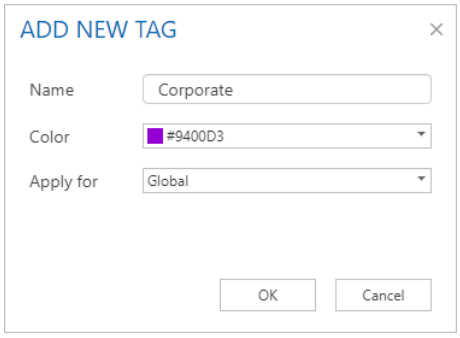
- **Tag Name** - enter descriptive name, e.g. “Personal”, “Marketing” or any other
- **Background Color** - click the dropdown and select the tag color or specify a custom color.
- **Apply For** - scope of the tag. Choose one or more from the following options
  - **Global** - tags are available for Archive Manager for Exchange, Archive Manager for Files and Audit.
  - **Exchange archive** - tags are available for Exchange archive
  - **Files archive** - tags are available for File archive
  - **Auditing** - tags are available for Archive

4. Click **Update** to save the changes. The new tab will be added to the tab list.

Create a Tag from the Archive > Exchange view or Report > Audit view

1. Log in to ArchiveWeb and open the **Archive** > **Exchange** view or **Report** > **Audit** view.
2. Click the + icon next to the **Tags** node in the navigation pane.

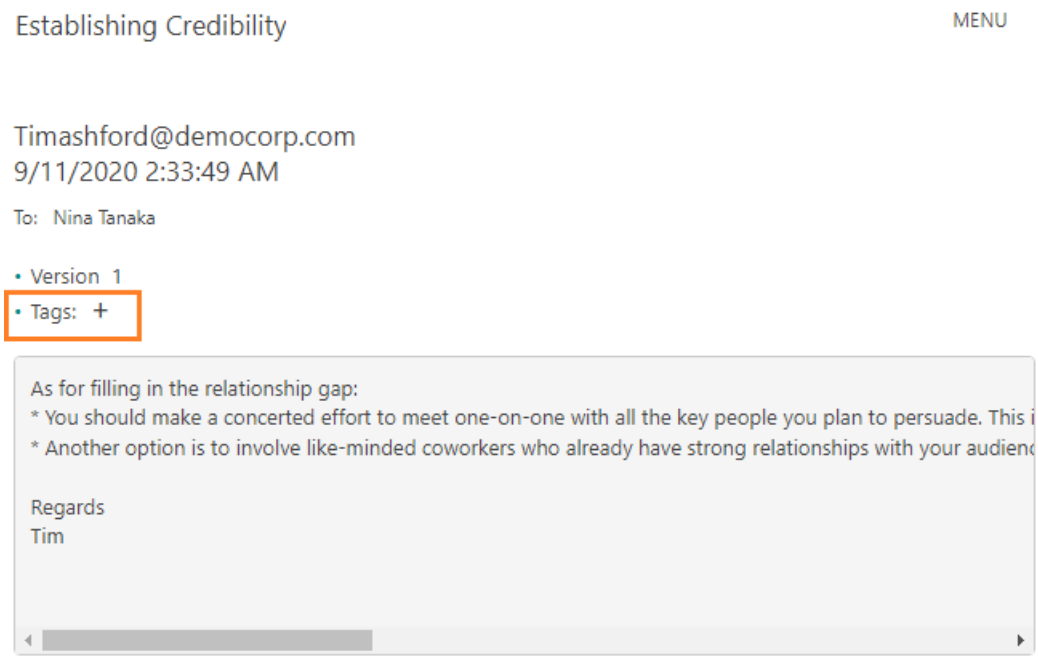
3. Enter the tag details in the **Add New Tag** dialog.



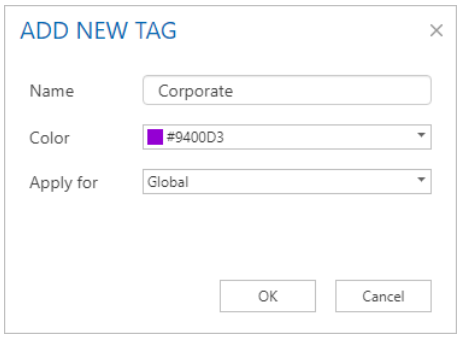
4. Click **OK** to save the tag.

Create a tag from item preview

1. Log in to ArchiveWeb and search for any archived items.
2. Select any item. from the preview pane click the + icon next to the **Tags** property.



3. Click + **Add new tag** in the **Add Tag** window that opens.
4. Enter the tag details in the **Add New Tag** dialog.



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

Steps to edit a tag

1. Click your user display 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 display 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 view or Archive > Files or Report > Auditing tab, or search for an archived item.
2. Select the item to view the item details in the preview pane.
3. To add a tag, do one of the following:
   - Use the MENU option
     a. Click **MENU** from the right upper corner in the preview pane.
     b. Click **Add tags**. From the **Add Tag** window that opens, select the tags you want to add to the item, and click **OK**.
   - Use the Tags + property in the item details
     a. Click the + icon next to the **Tags** property.
4. In the **Add Tag** window that opens select one or more tags that 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.
5. To remove a tag, do one of the following:
   - Use the MENU option
     c. Click **MENU** from the right upper corner in the preview pane.

d. Click **Remove tags**. From the **Remove Tag** window that opens, clear the tag checkboxes that you want to remove from the item, and click **OK**.

- Use the Tags property in the item details

b. Click **X** next to the tags that you want to remove from the **Tags** property. Click **Yes** in the confirmation window that opens.

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.

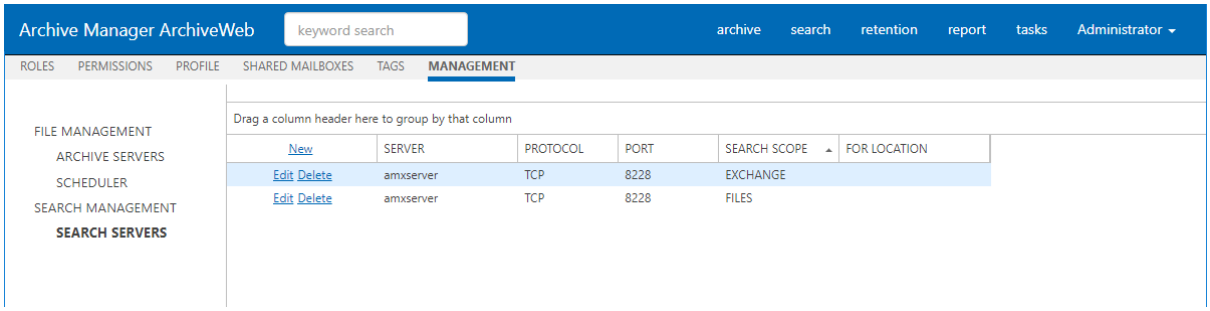
By clicking the **Delete** option the respective Search server will be removed, i.e. it will not be used for Searches.
To add a new Search server click **New** option in the list header. It will add a new row to the list where you can specify the Search server properties.
NOTE: Avoid using *localhost* 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 it 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.



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

6

ArchiveWeb Interface and conventions

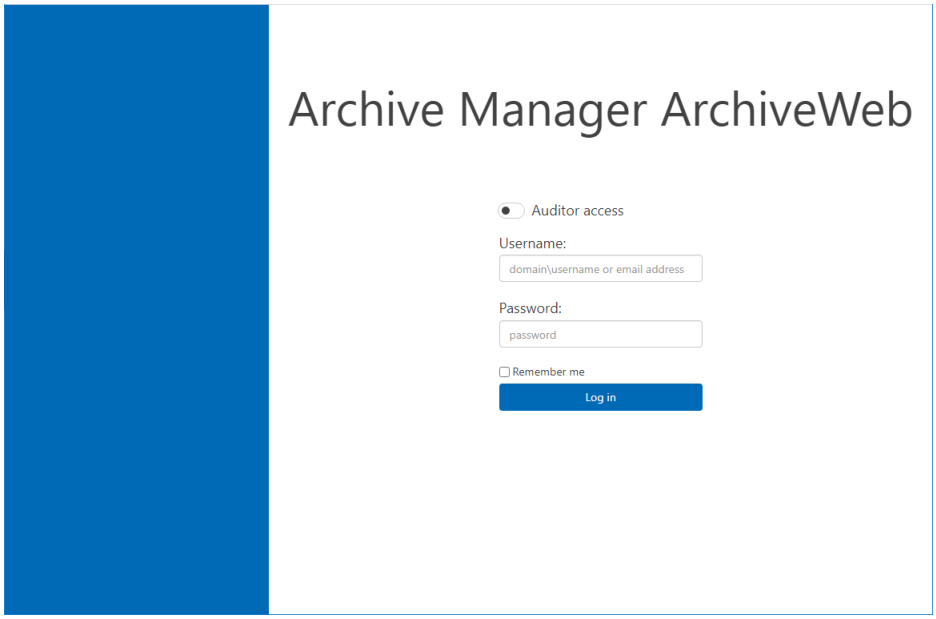
After browsing the ArchiveWeb URL (http://<ArchiveWebServerName>/archiveweb), the Login window gets displayed. Users are asked to enter their name (or “domain name\username” or “email address”) and password. Email address should be:

- 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.

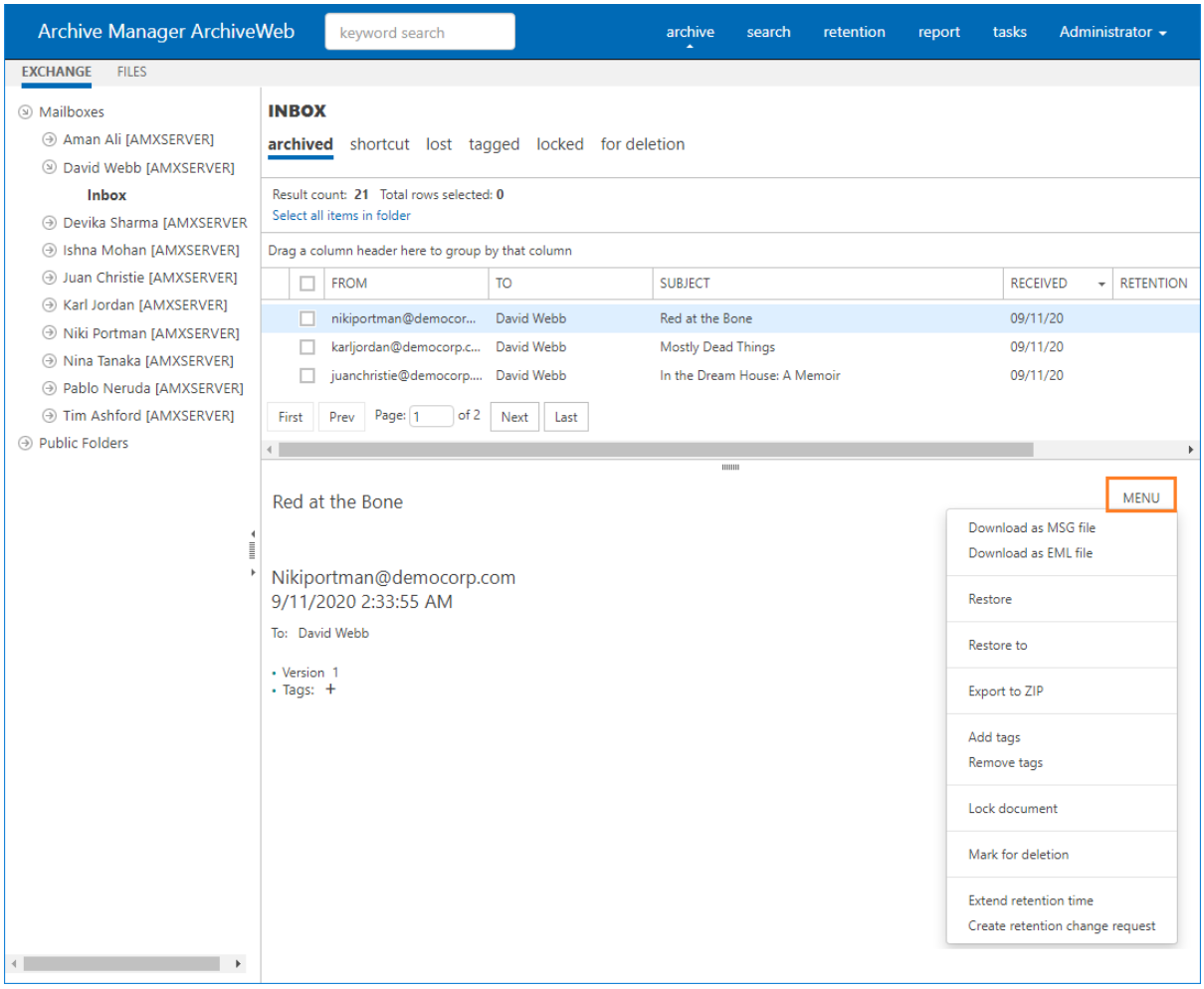
List view conventions

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:

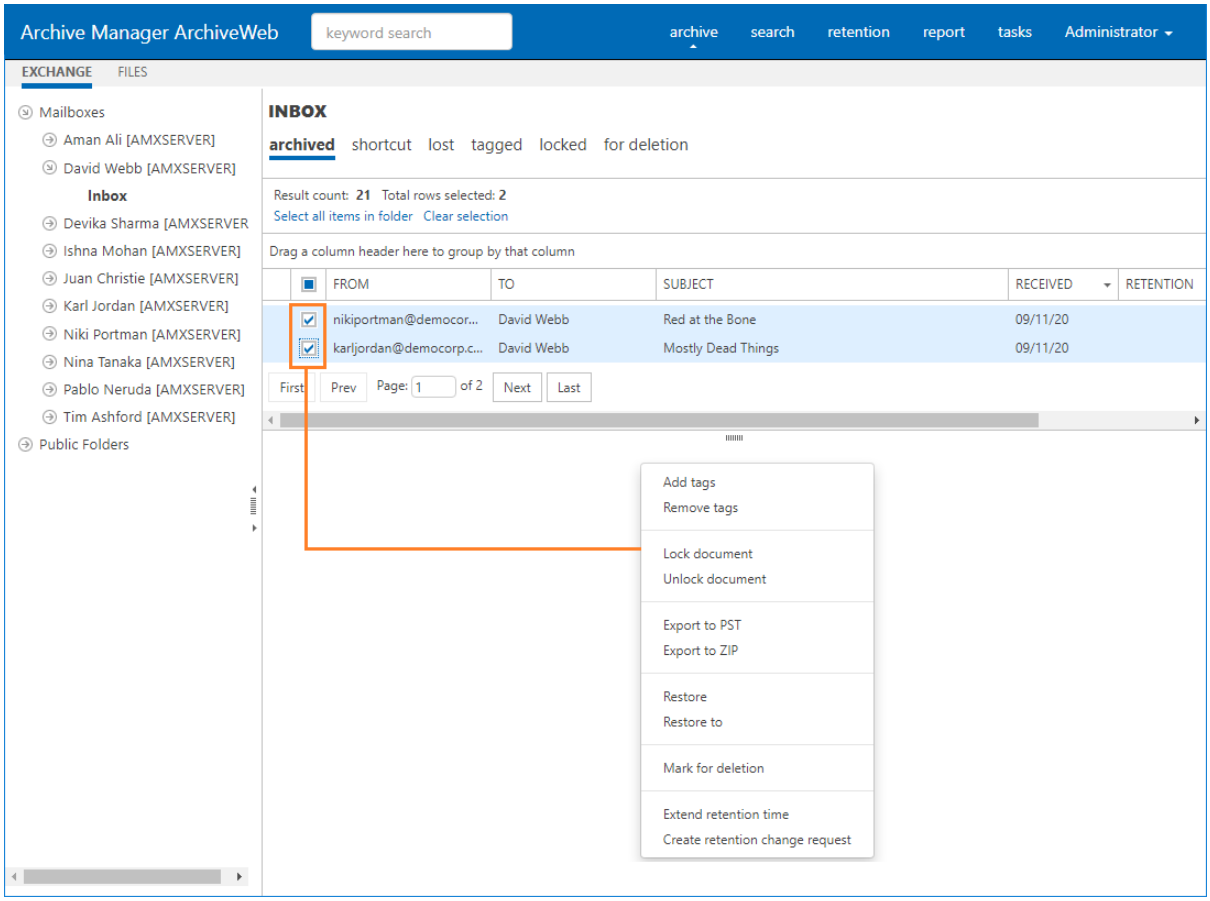
- archived - all folder archived items except items marked for deletion
- shortcut - archive items with shortcut in mailbox
- lost - archived items with no reference in mailbox/file system
- tagged - archived items with tag(s)
- locked - locked archived items
- for deletion - archived items that are 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.



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.

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)

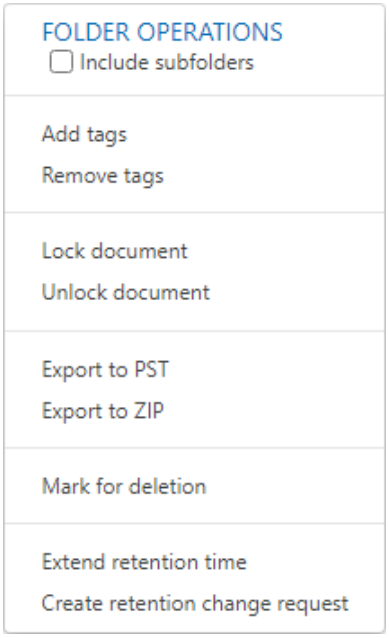
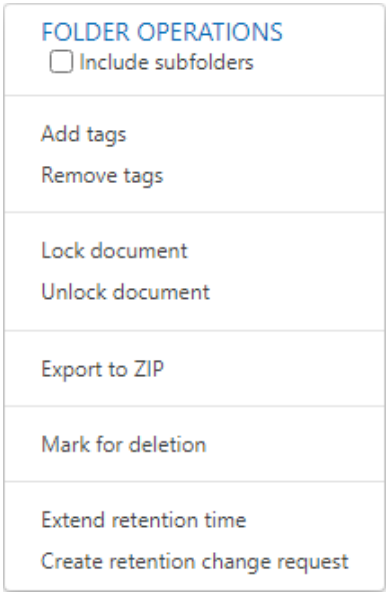
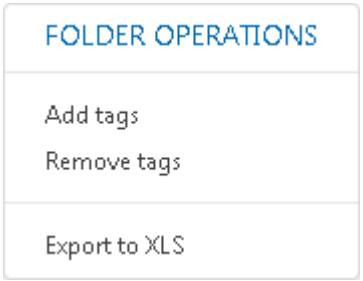
- **grouped** Group table data by any column. To do so, drag the column header to the bar right above the table. Generated groups can be expanded by clicking the arrows next to them. As usual, the sorting order can be changed by clicking the little arrow in the dragged column header

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”.

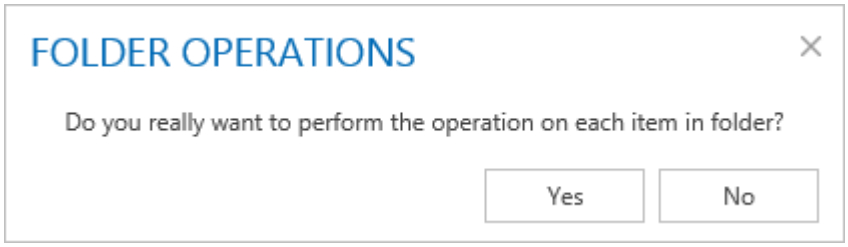
When a user clicks on the **Select all items in folder** link, the **Total rows selected** label will show the same number as **Result count** label shows. No item will be selected (see picture below).

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

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

Exchange	Files	Audit
		

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.

7

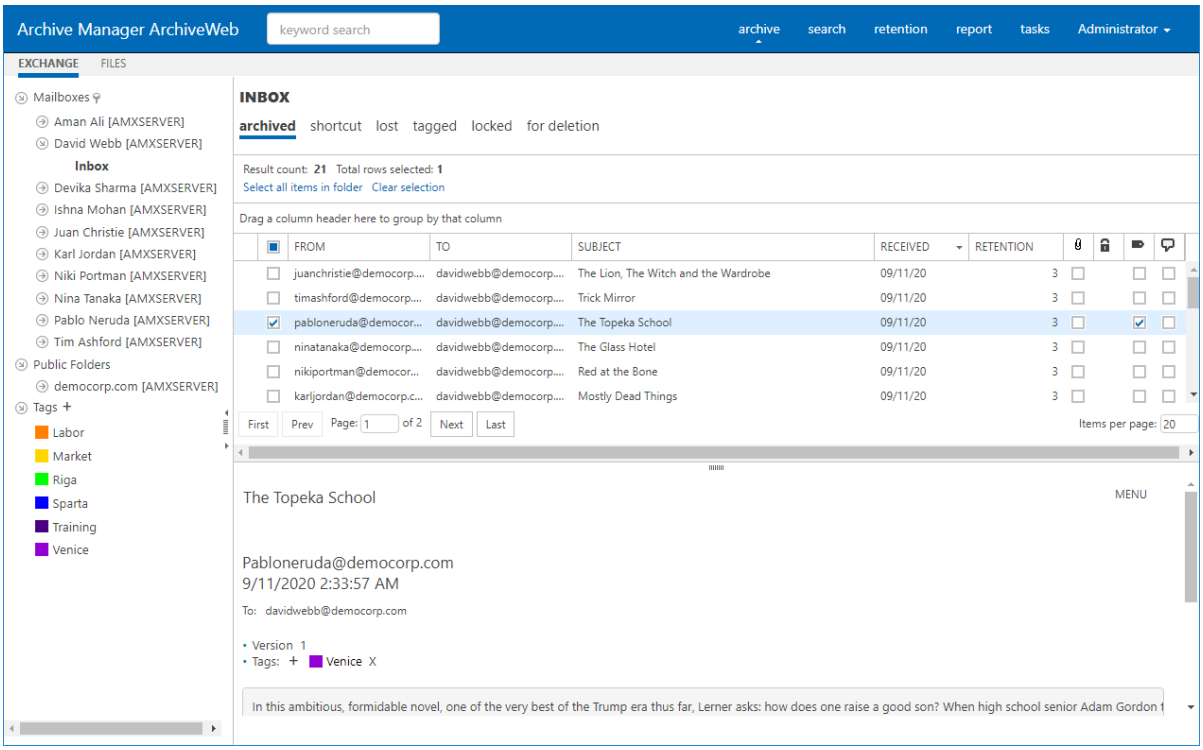
Archive

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** form 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).



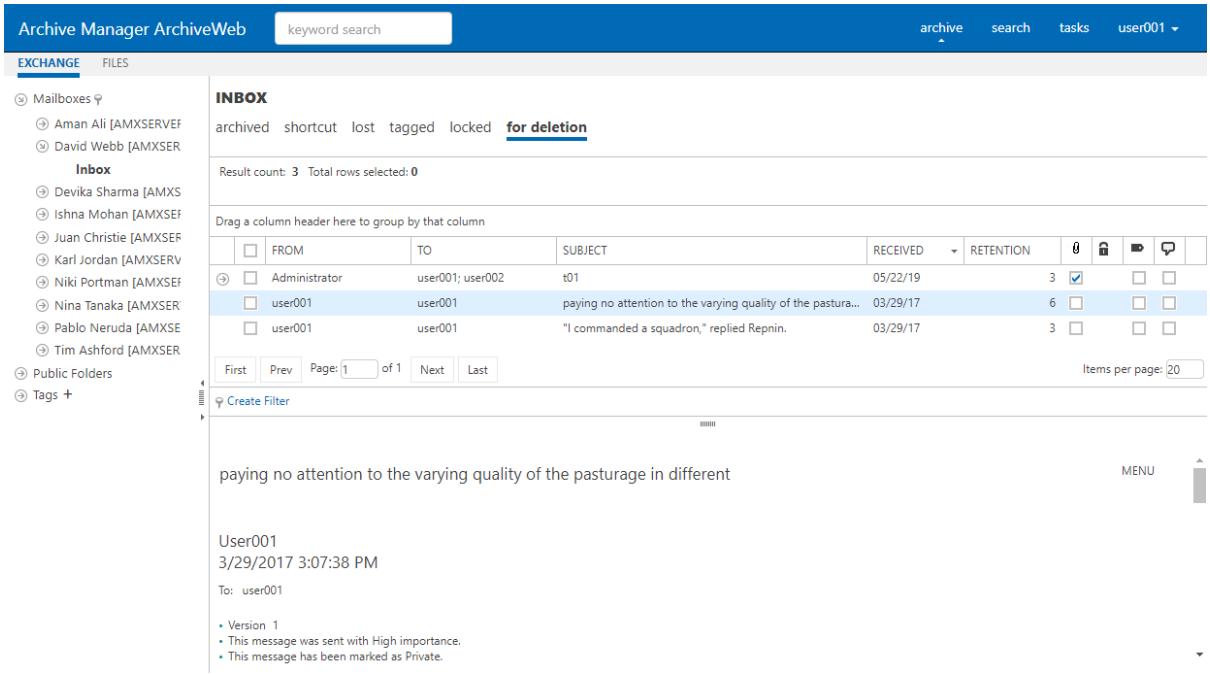
NOTE: Not all **Exchange** tab functions may be available for the logged-on user. The functions must be allowed for the user. For more information see the **Roles** and **Permissions** sections.

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 has been granted access rights in the Archive Manager Administration Center .

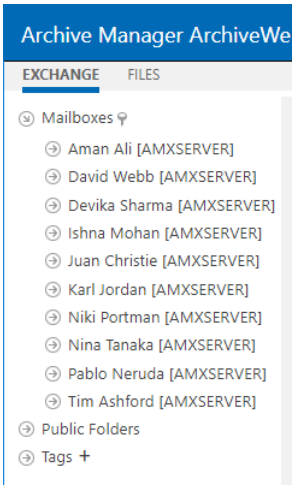
You can expand each mailbox to access the folders in the mailbox that contain archived emails. The content of the folder selected in the left pane is displayed in the main pane of the window. The list can be filtered by categories as listed above the list view:

- **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)

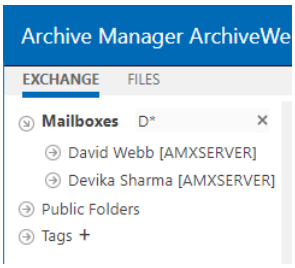


Filtering the Mailboxes node

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 you 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:

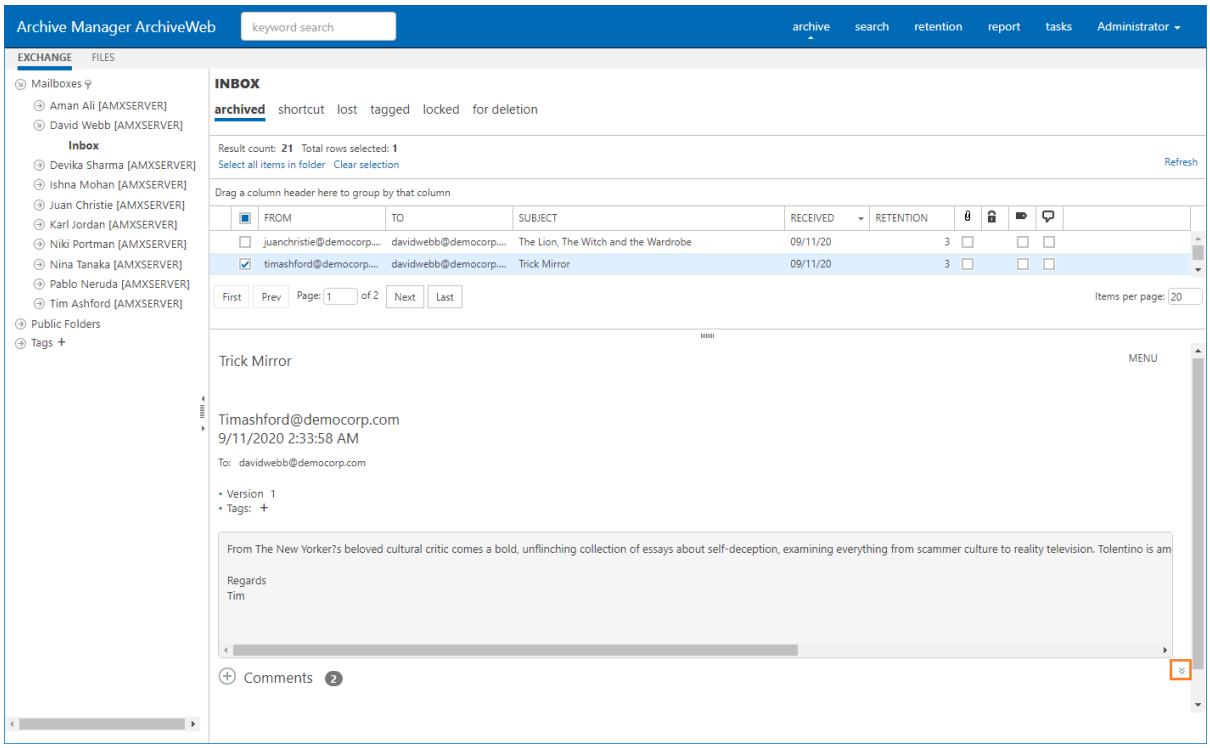
- From column – sender of the message
- To column - recipient(s) of the message
- Subject - email subject
- Received - receive date
- Retention - archive retention (in months)

- 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.

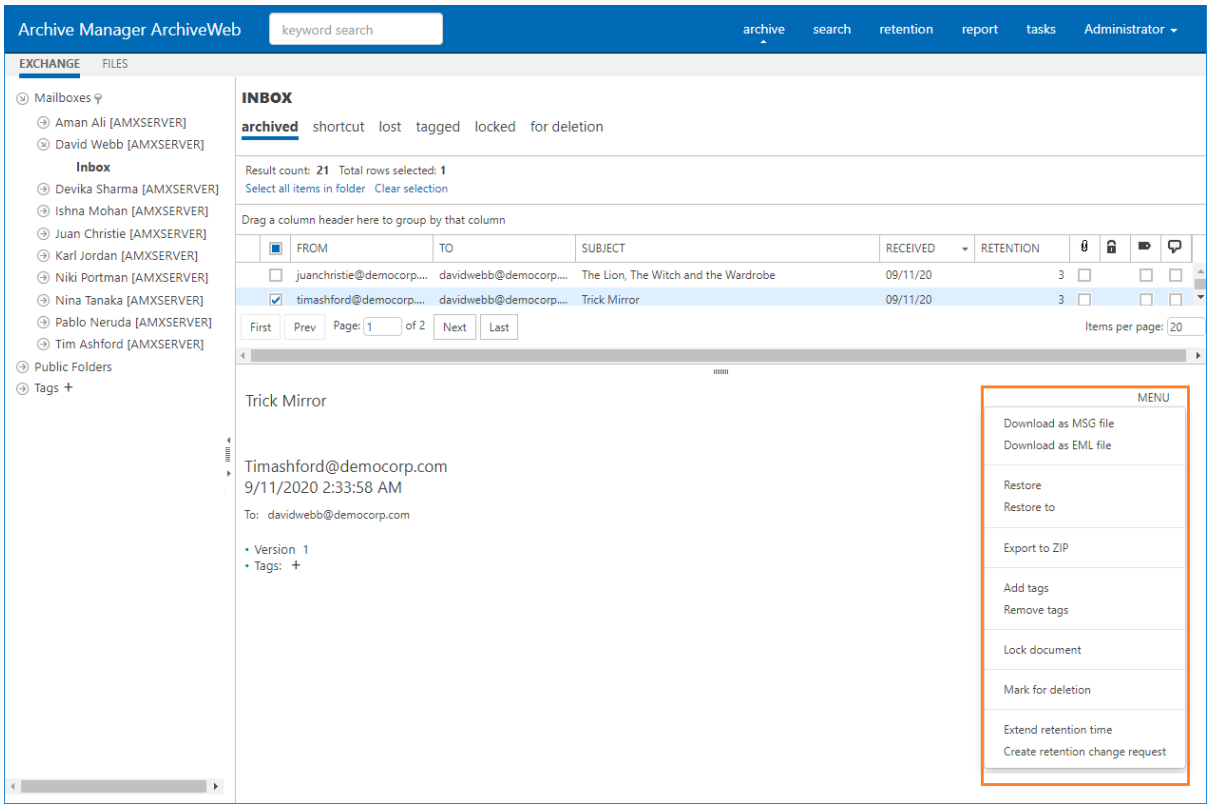
In the **Preview** pane, it is possible to add comments to emails. Simply scroll down in the **Preview** pane. Click plus sign ⊕ next to the **Comments** heading. Enter a note in the provided text box and click **Yes**. The comment with creation details is displayed under the **Comments** heading. Should 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.



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.

> **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.

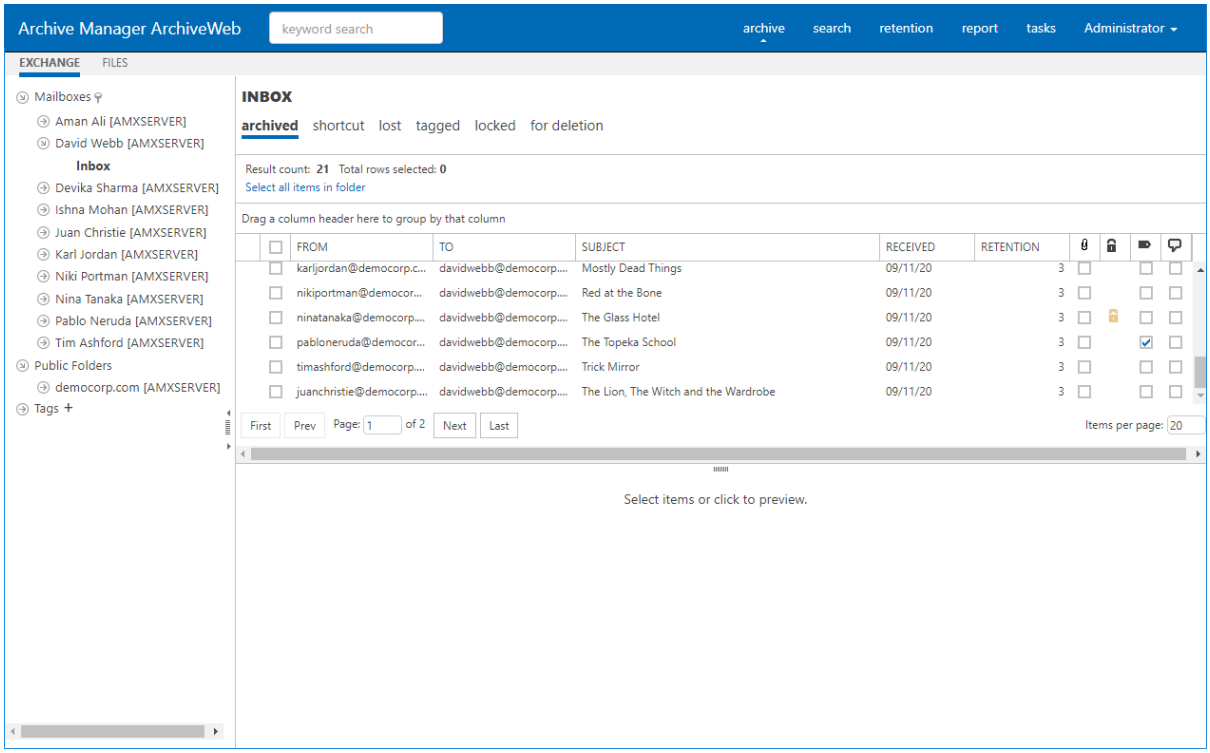
- **Export to ZIP** - compress and export the selected email(s) and define a password for the zip file.
- **Export to PST** - available when multiple items are selected.

- **Add tags / Remove tags** - tag your items. You can use exisitng 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.



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

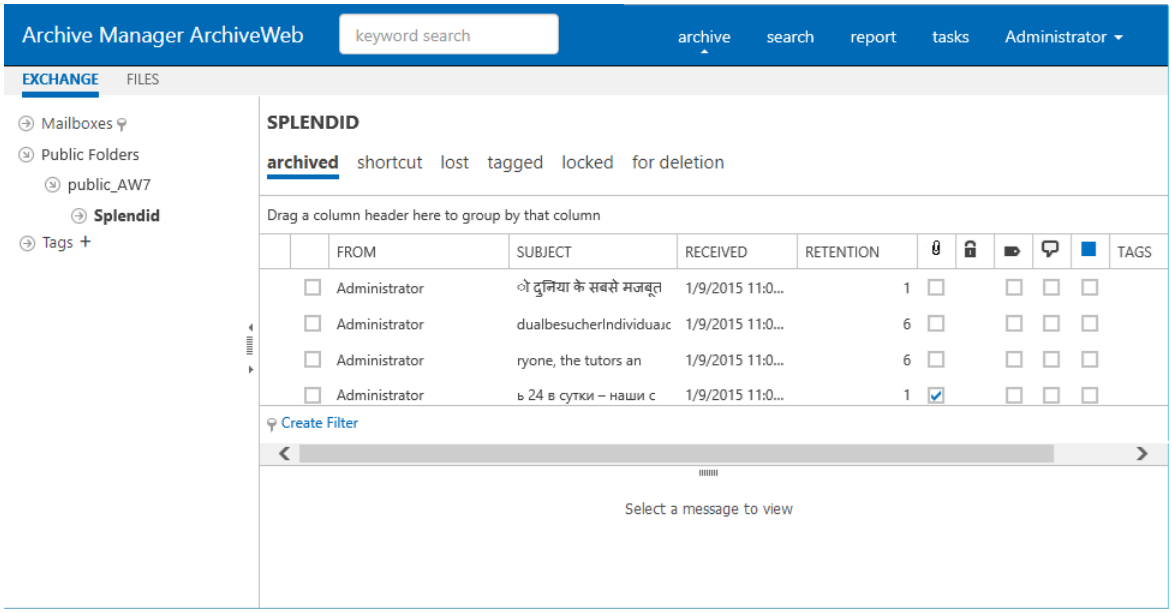
NOTE: Unlock documents by selecting **Unlock document** from the **More actions** menu.

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).



8

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 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 *Archive Manager for Exchange,* and file content in for *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.

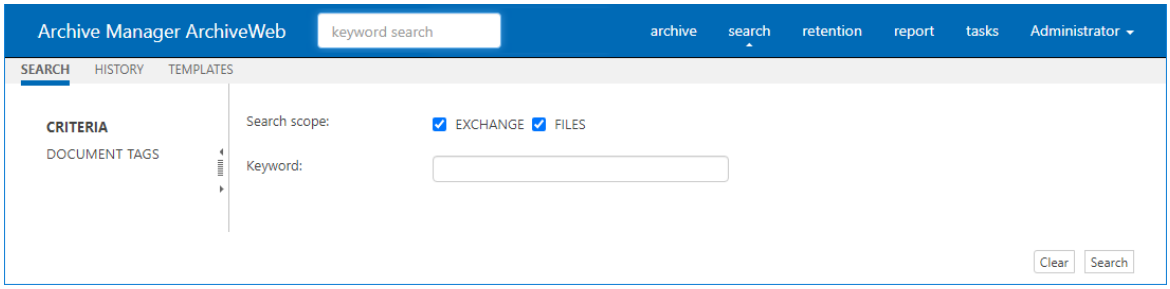
- **Show search field in header** is selected which displays the keyword field in the header.
- **Keyword** is set to **Exact phrase**. No wildcards are added. The user can add a wildcard manually if needed.
- **Set default search scope** is set for both **Exchange** and **Files**.

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'

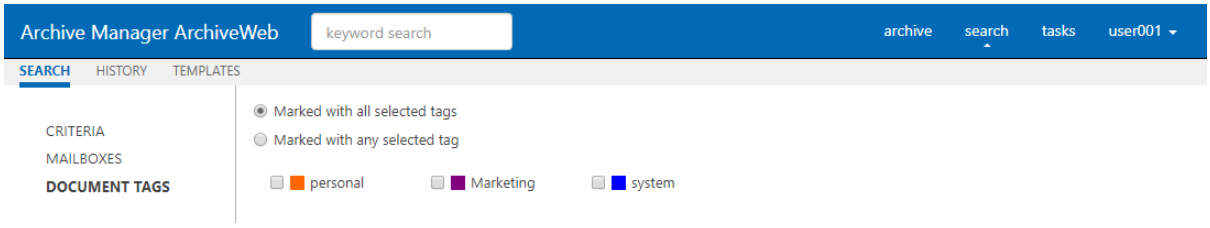
Document tags

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.

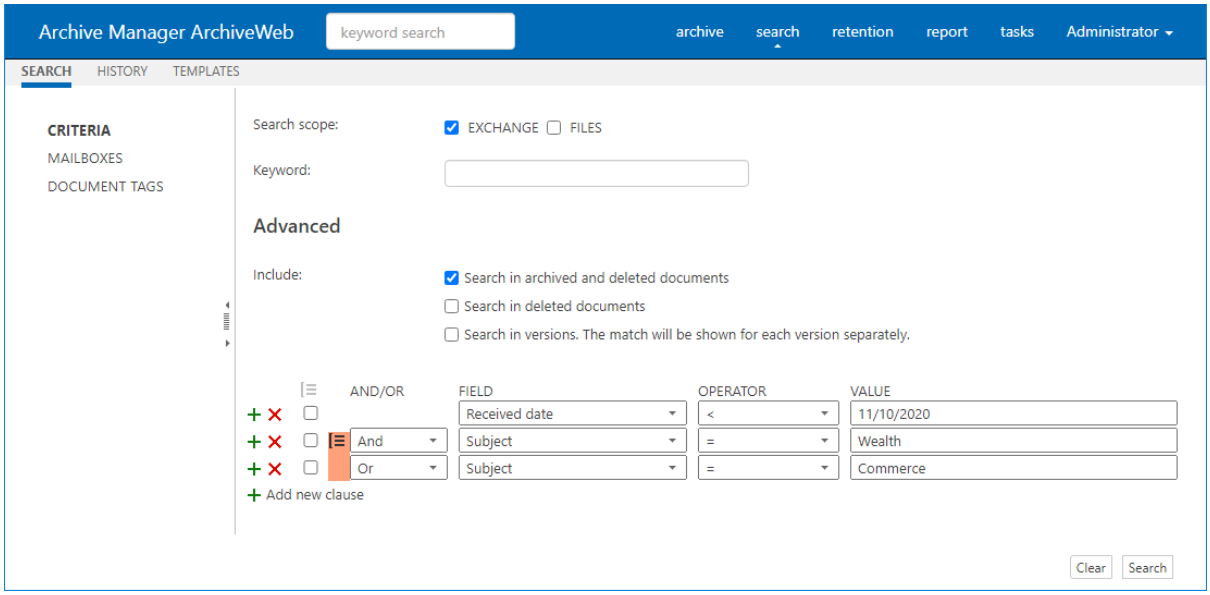


Advanced Search

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:

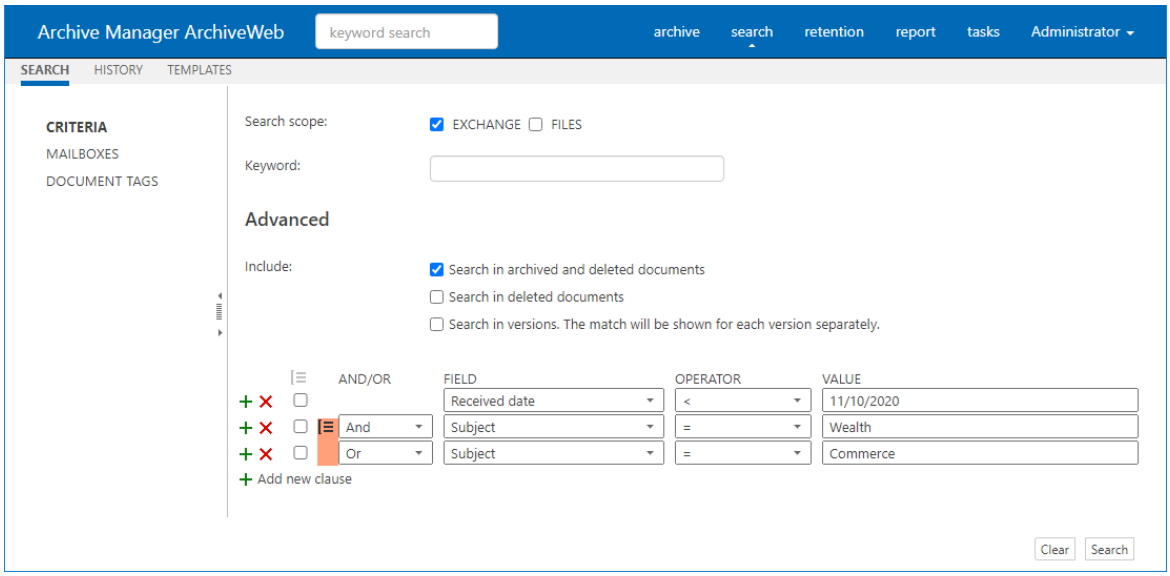
   a. **And/Or**: Or

   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:



Mailboxes

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

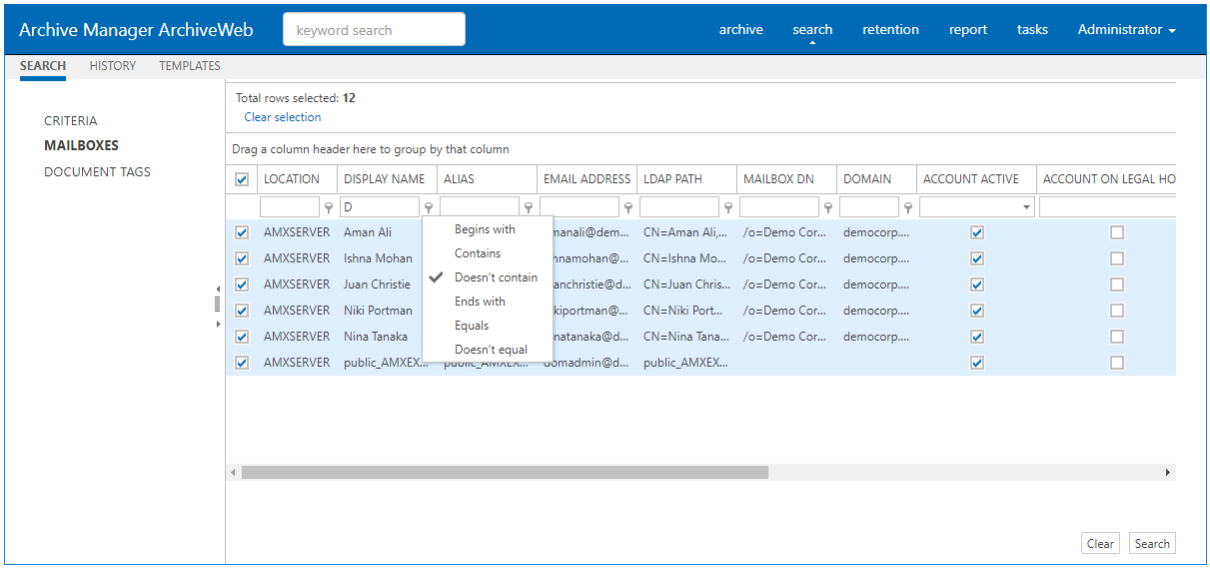
To search for mailboxes:

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

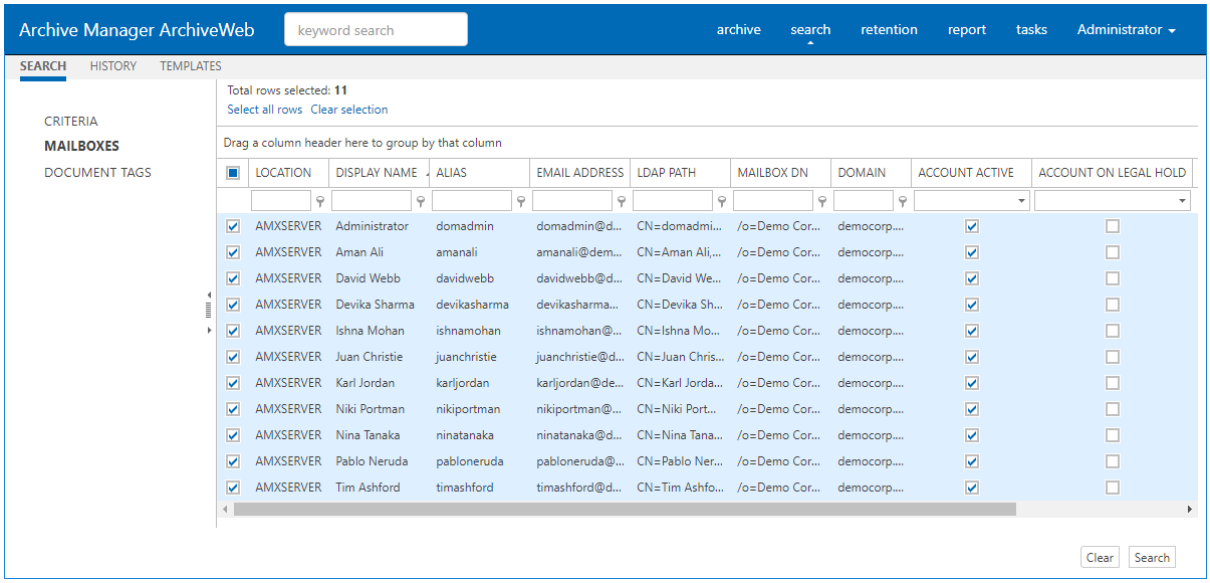
To group mailboxes:

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.



NOTE: To search in journal mailboxes:

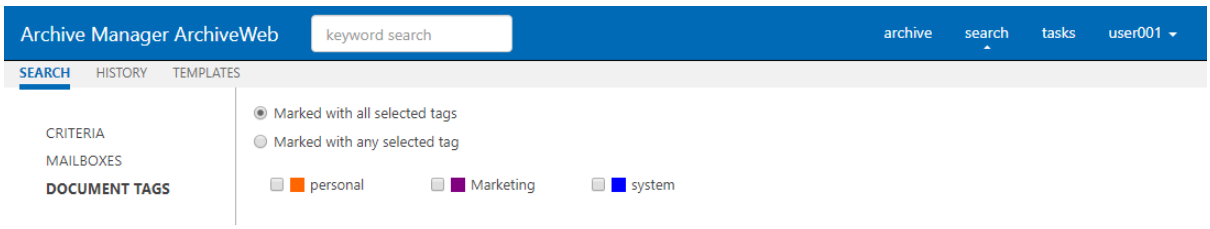
- If a user has *Journal* permission set in ArchiveWeb then the user can search through their own emails, where is present as a kind of recipient (sender, recipient).
- If a user has *Journal* access granted through *Archive Manager* > *Tools* > *Mailbox rights manager,* then the user can search all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

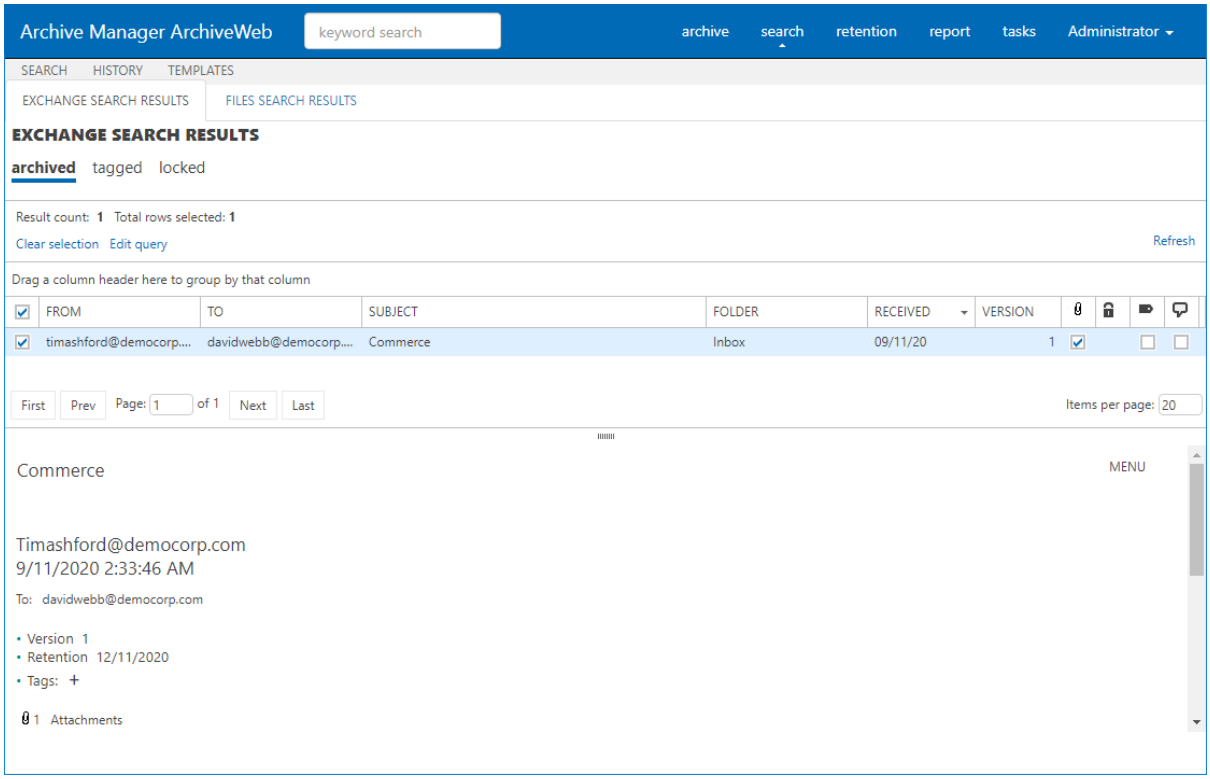
1. Select one or more document tags.
2. Select a search option as described below:
   a. **Marked with all selected tags** - select this option to search emails which are tagged with *all* the selected tags.
   b. **Marked with any selected tag** - select this option to search emails which are tagged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



Search Results

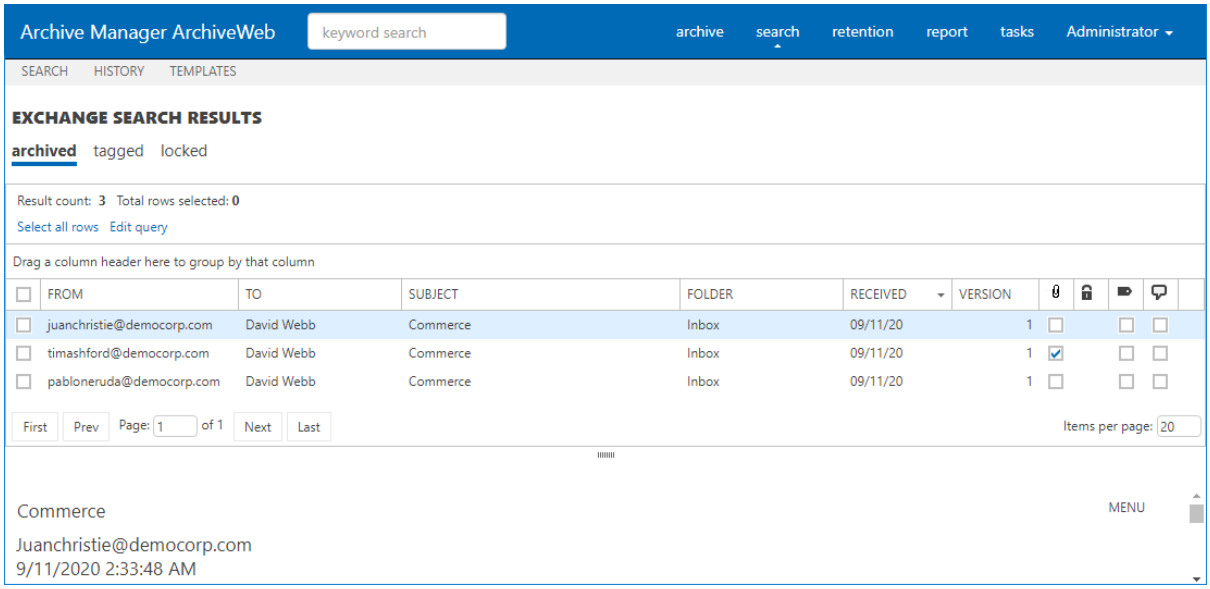
Keyword search

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.



Advanced search

For advanced search, the search result uses an expanded set of search criteria with product-specific search capabilities.



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 attachement or file are visible only if the application to view the attachment is also installed on the server. For example, the contents of a PDF file will be visible only if a PDF viewer is installed on the server.

Search Operations

Search operations are asynchronous. When you 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. Every search operation is listed in the Tasks page.

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

When keyword search is used, keywords in the search results can be highlighted.

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

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

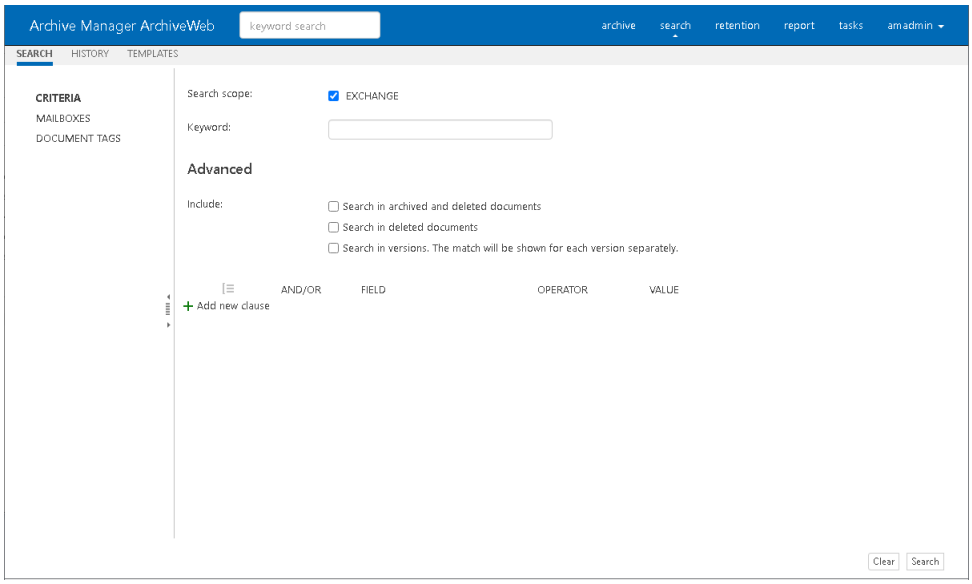
Simple Conditions

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

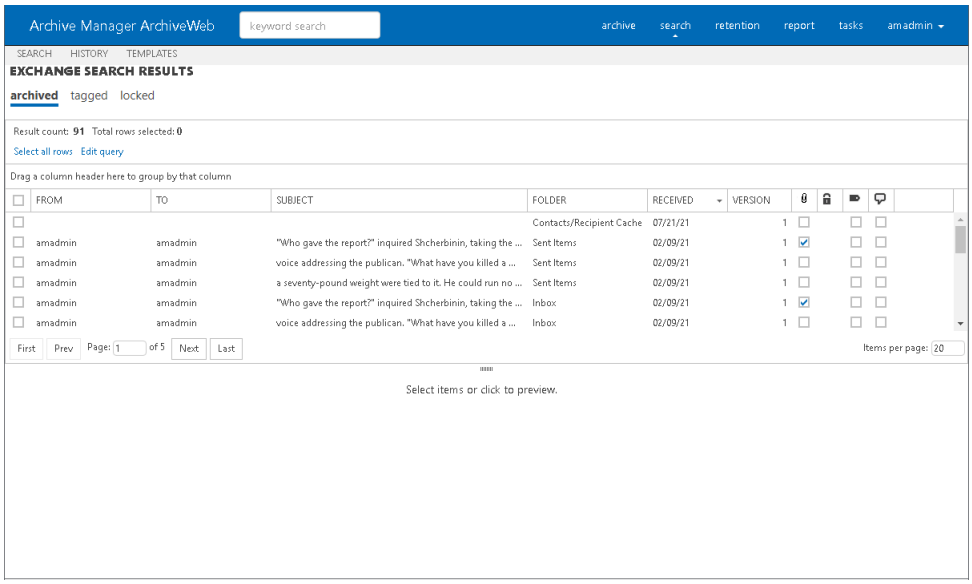
Example 1

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

Query



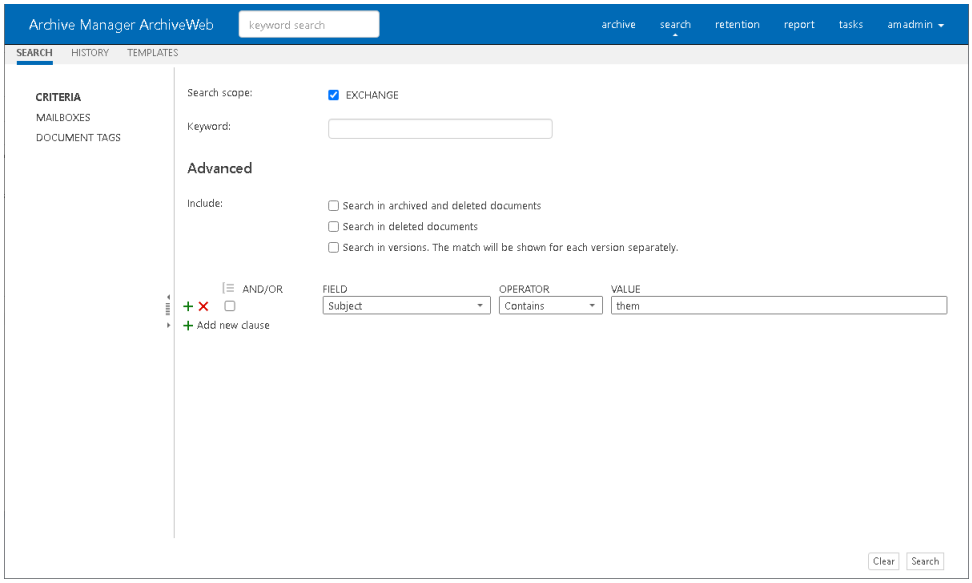
Result



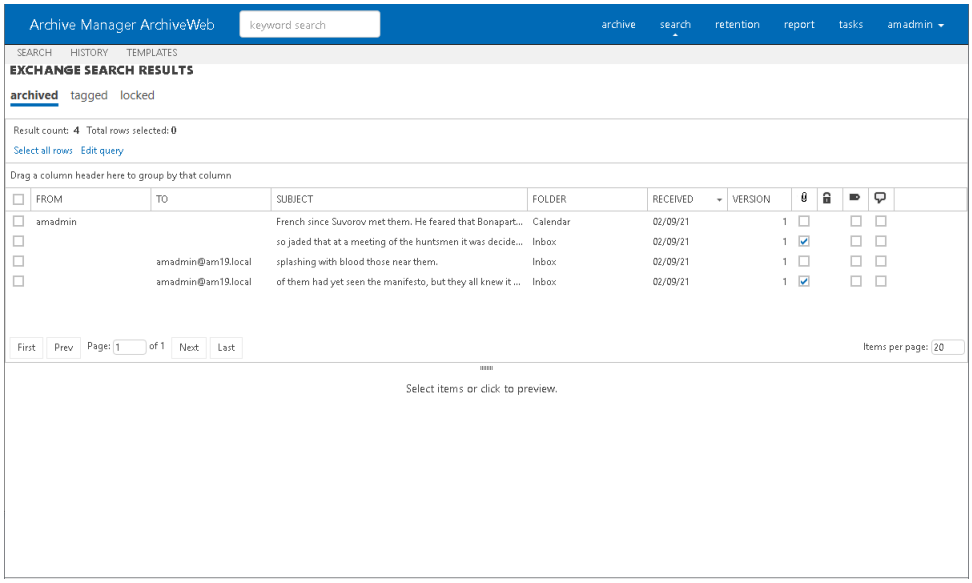
Example 2

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



Result



AND/OR operators

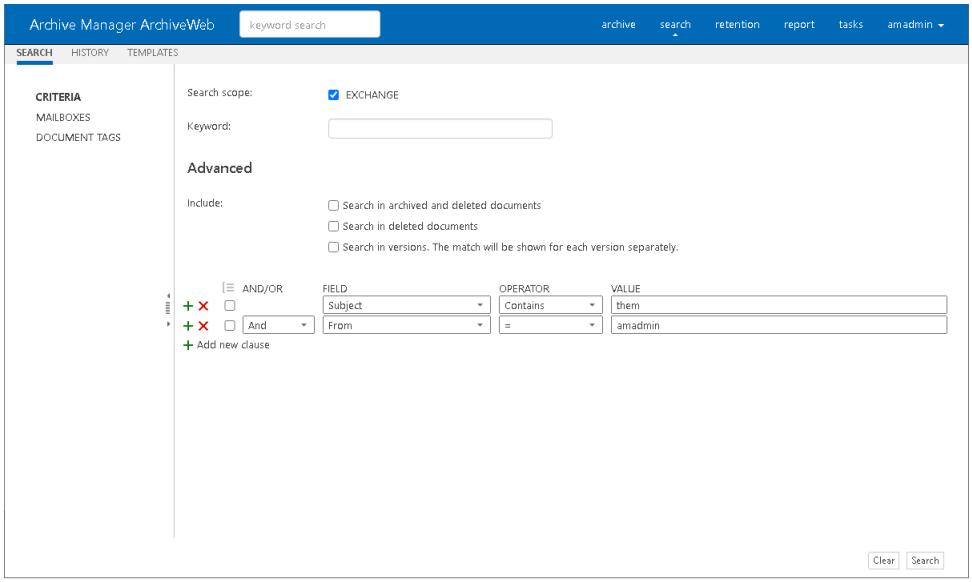
The AND/OR operator is used between two search clauses. With these operators, you can combine two or more search clauses. The AND operator will return a search result if both the search clauses separated by the AND operator are fulfilled. The OR operator will return a search result if any one of the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

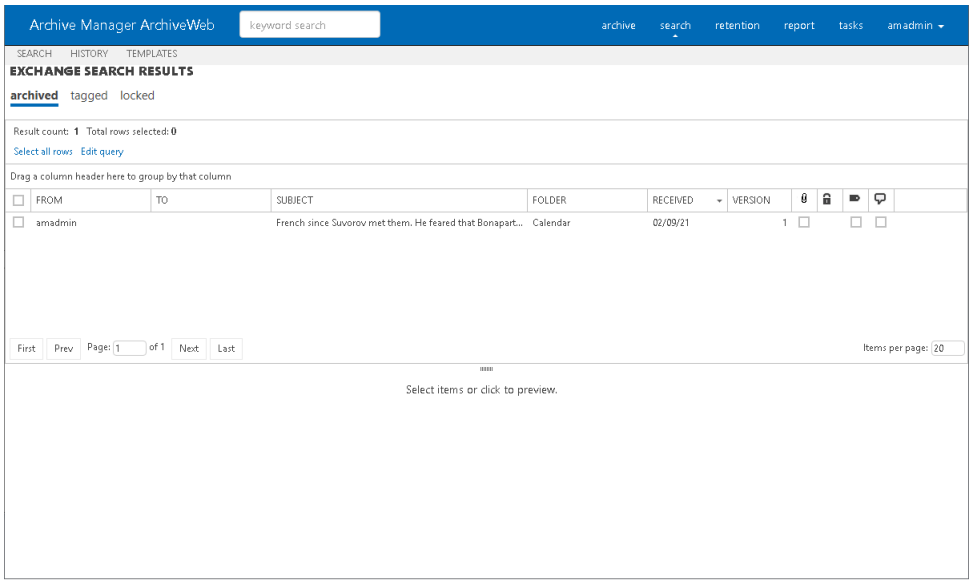
Example 1

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

Query



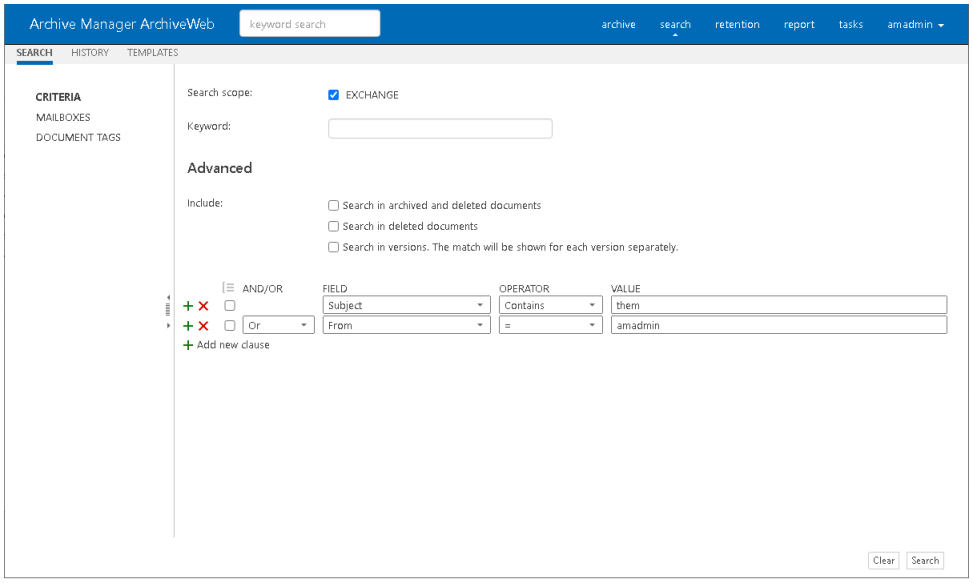
Result



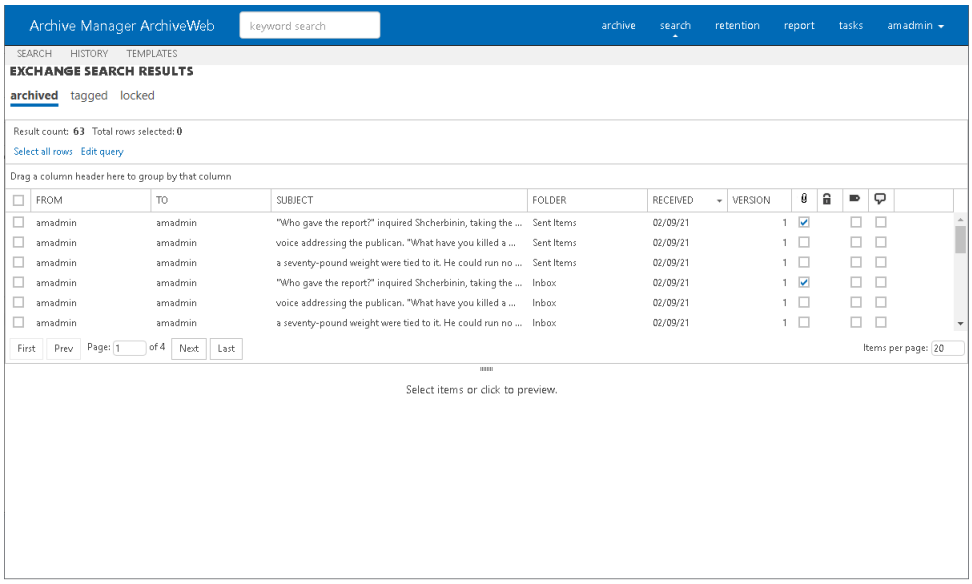
Example 2

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

Query



Result



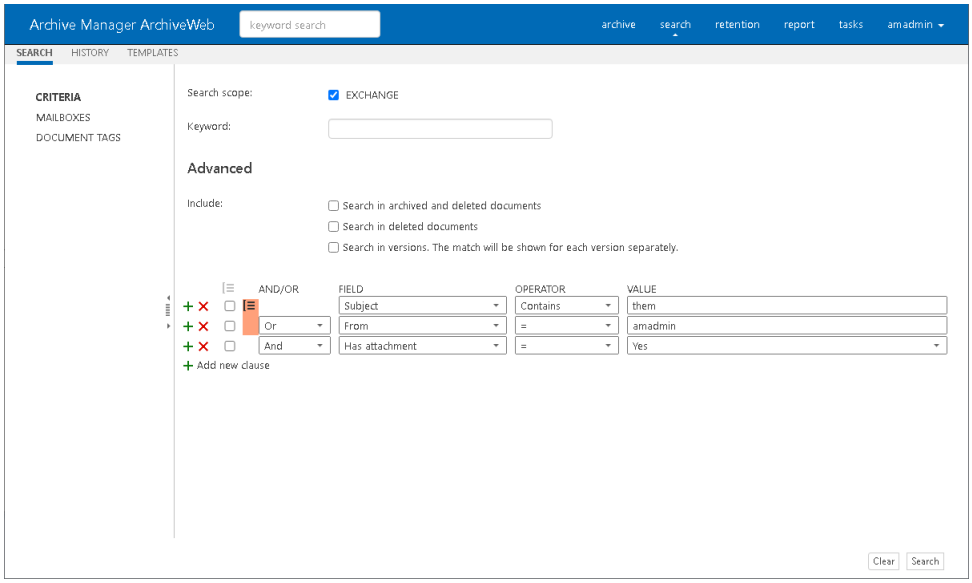
Grouping

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.

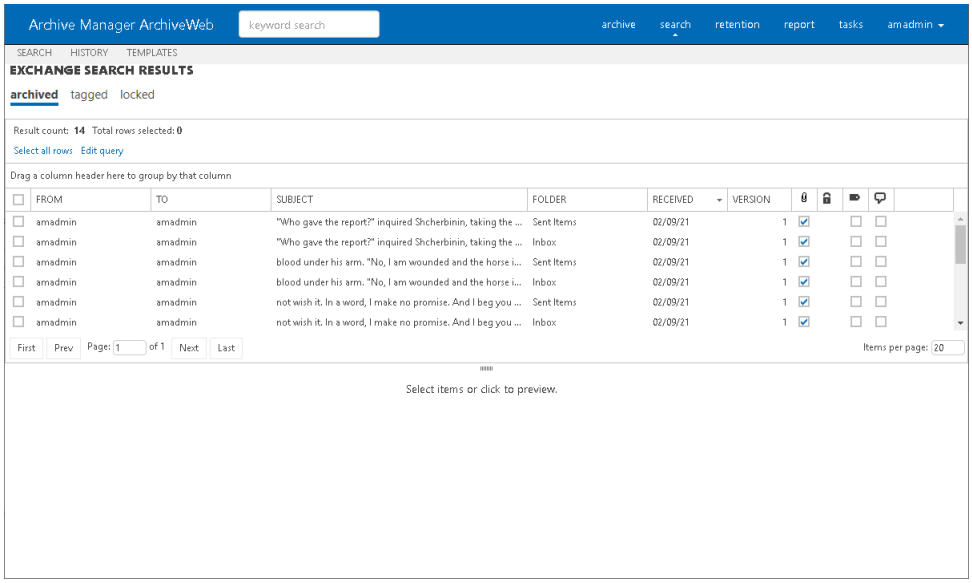
Example 1

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`



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



We can split this search condition into two parts

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

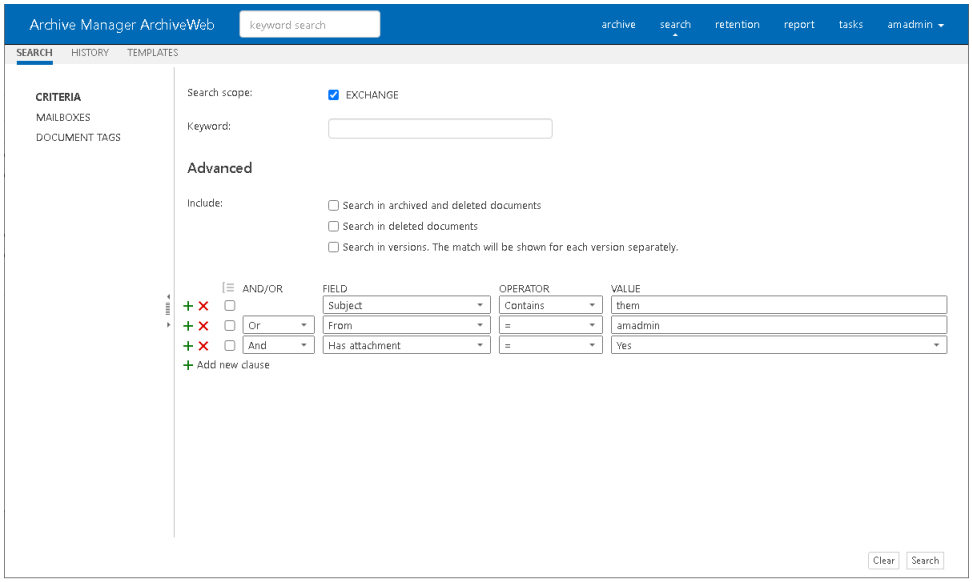
2. AND has attachment

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

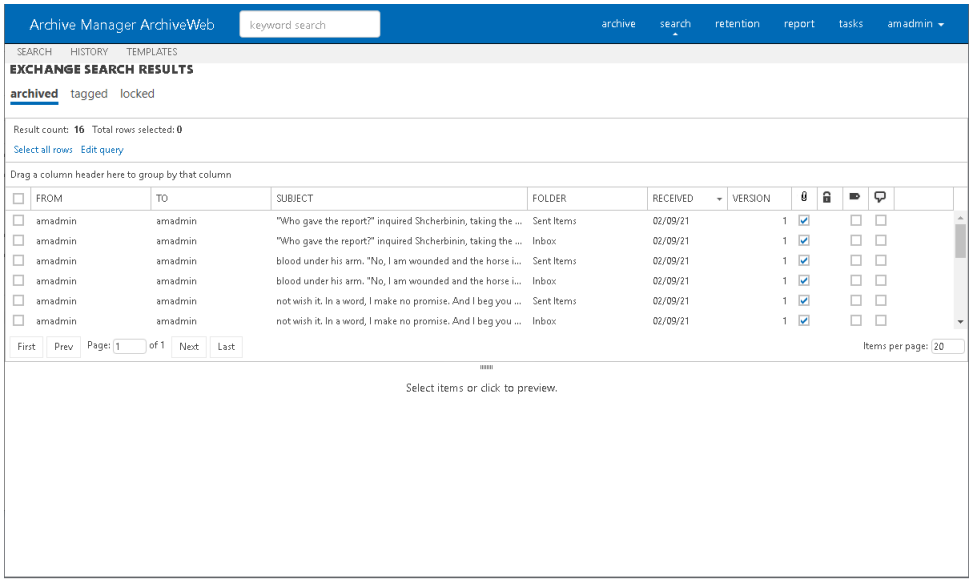
Example 2

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

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



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



This query we can be split into two parts

1. Subject contains "them" OR

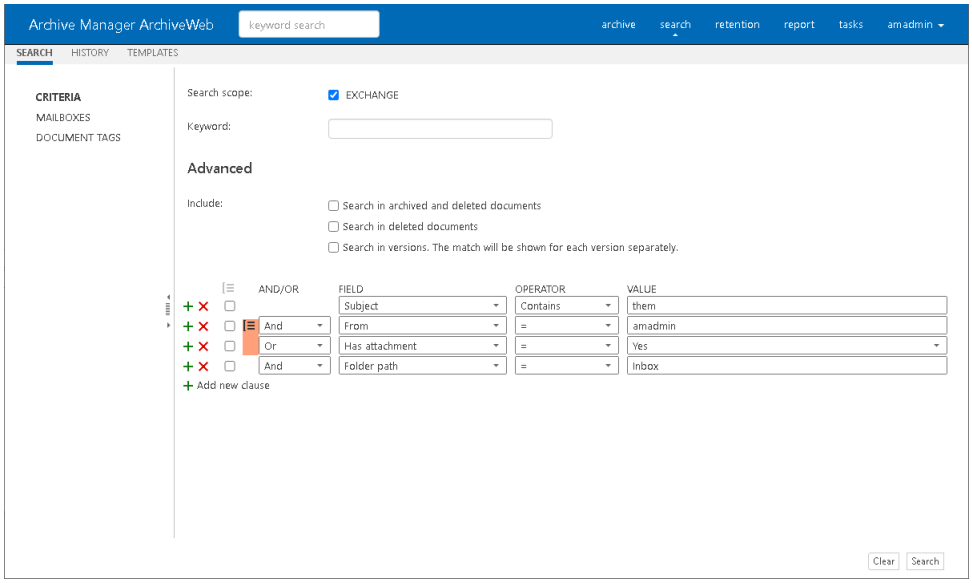
2. Sender is "amadmin" AND the item has an attachment

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".

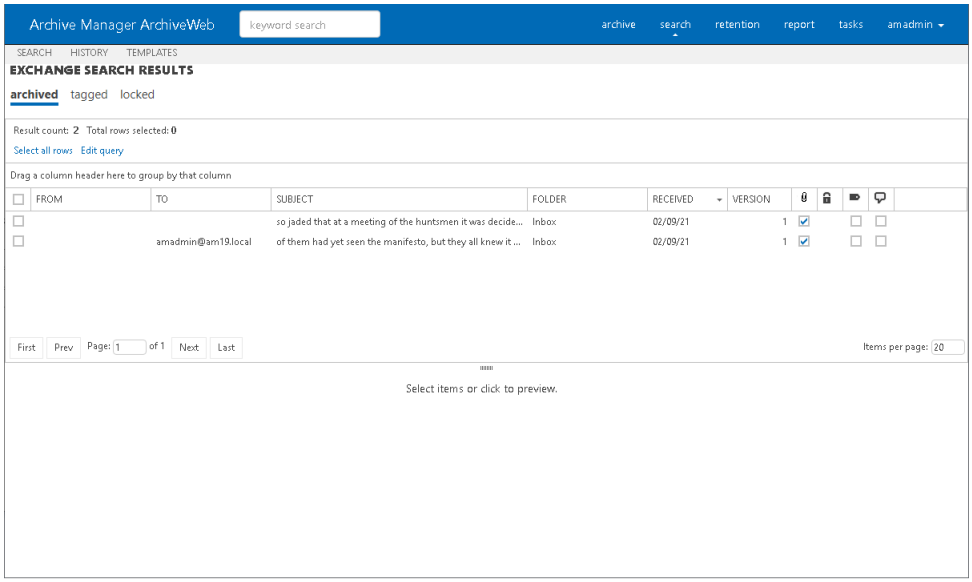
Example 3

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`



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



This query can be split into three parts

1. Subject contains "them" AND

2. (Sender is "amadmin" OR the item has an attachment)

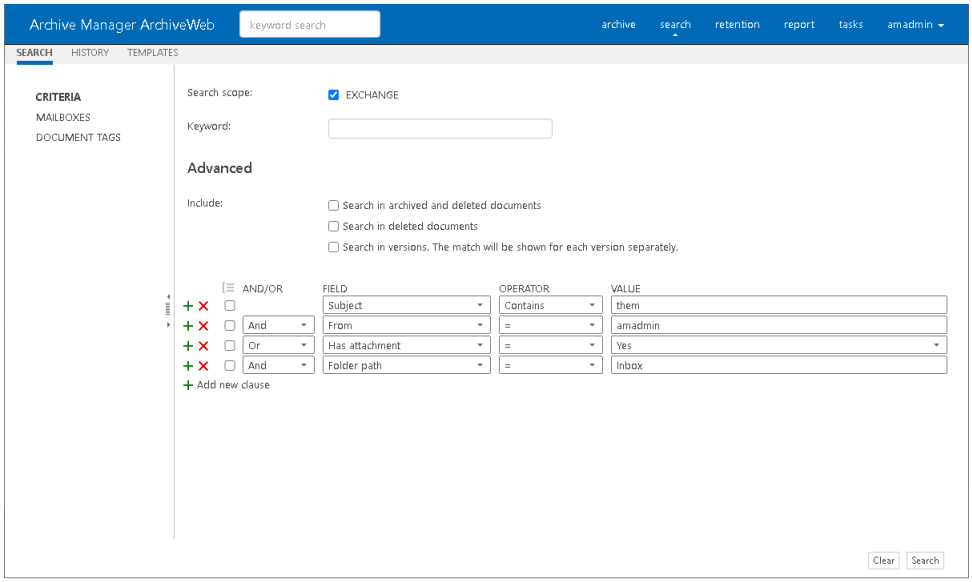
3. AND Folder path is "Inbox"

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

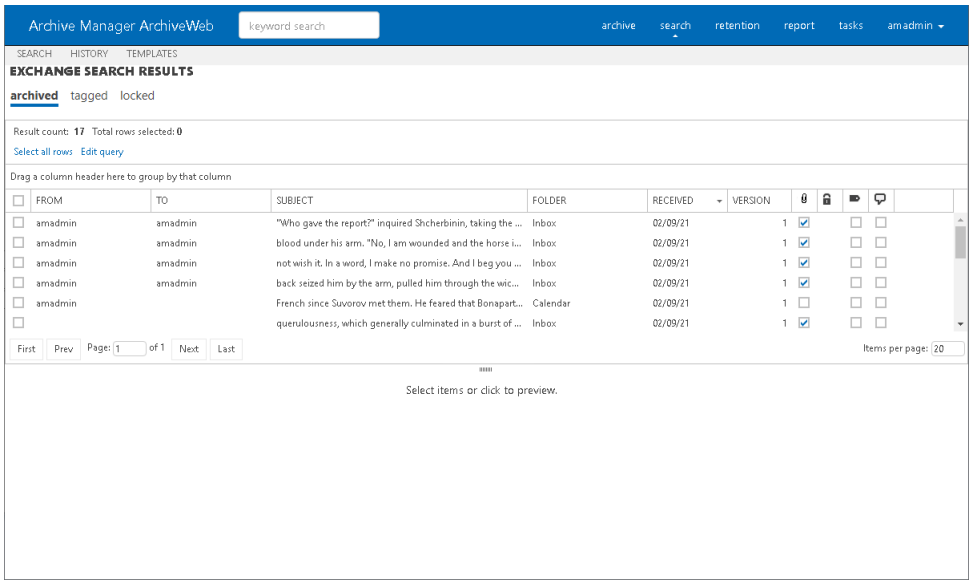
Example 4

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

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



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



This query can be split into two parts

1. Subject contains "them" AND Sender is "amadmin" OR

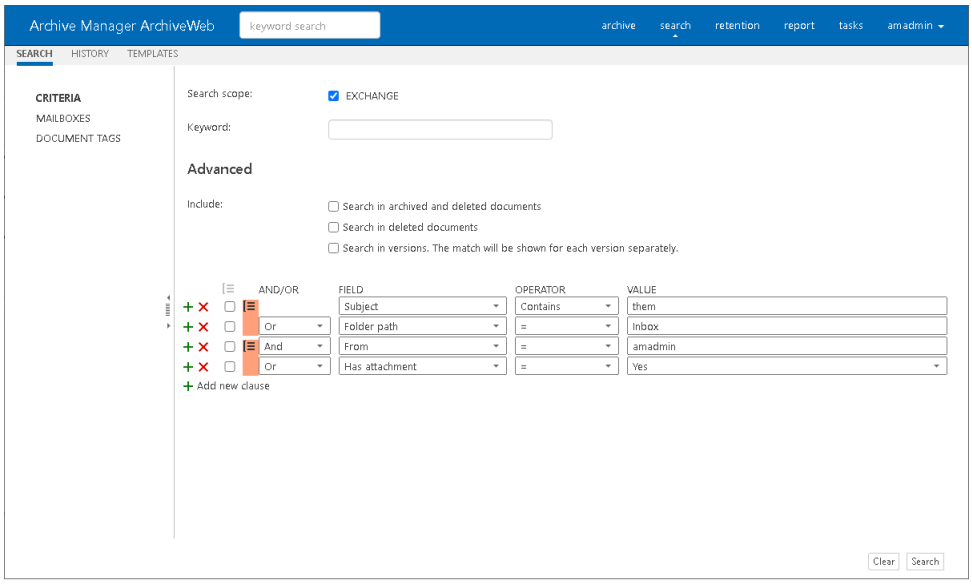
2. Item has attachment AND Folder path is "Inbox"

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

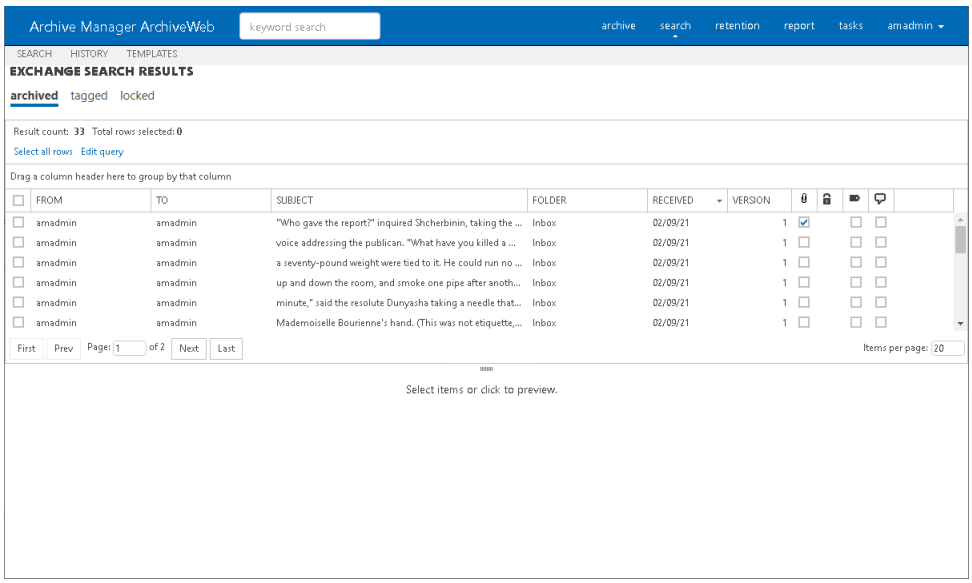
Example 5

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

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



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



This query can be split into two parts:

1. (Subject contains "them" OR Folder path is "Inbox") AND

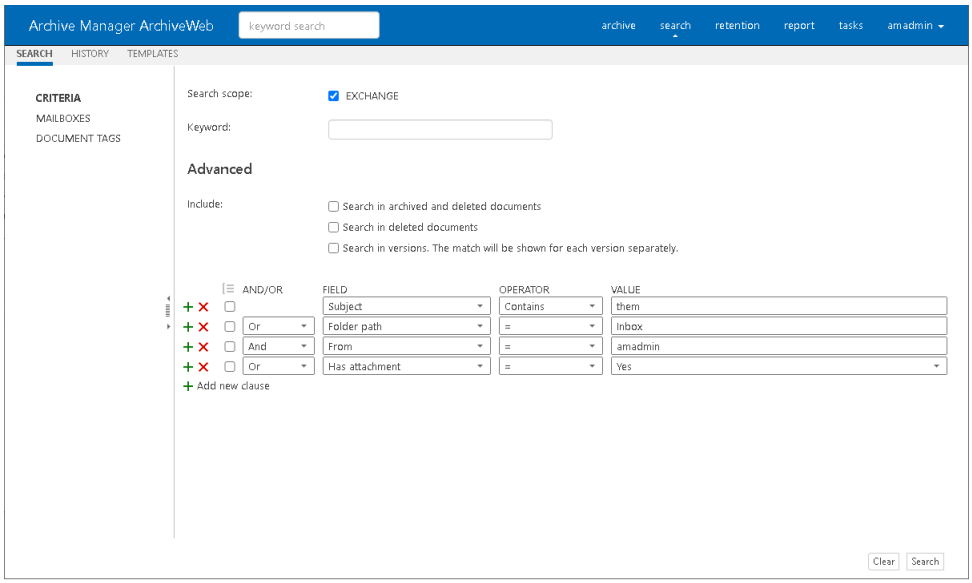
2. (Sender is "amadmin" OR item has attachment)

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

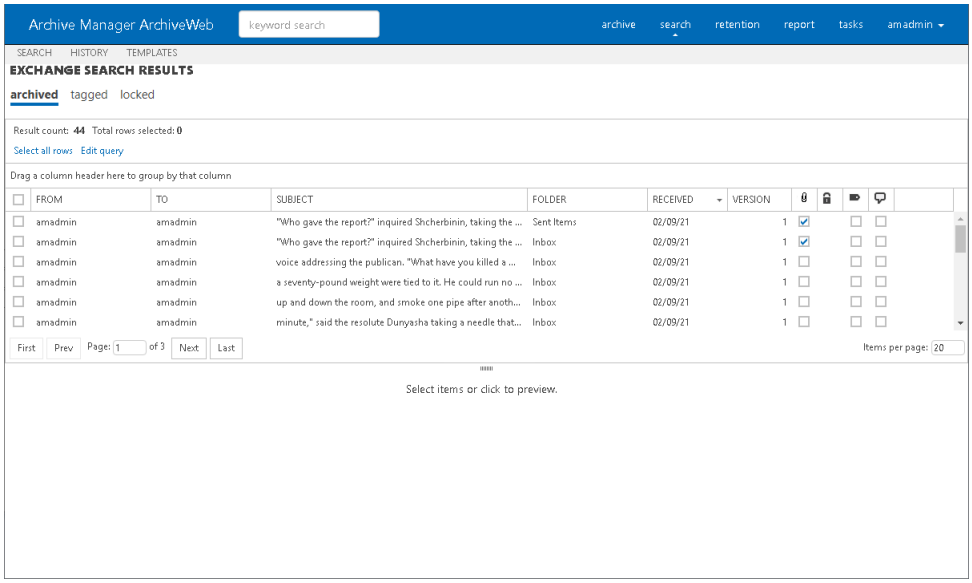
Example 6

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

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



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



This query can be split into three parts:

1. Subject contains "them" OR

2. Folder path is "Inbox" AND Sender is "amadmin"

3. OR item has an attachment

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

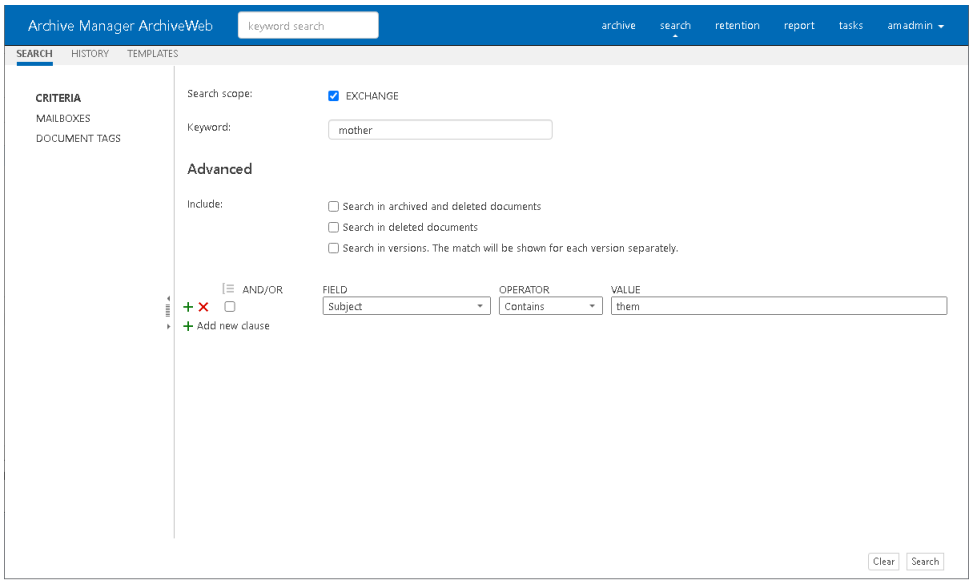
Keyword search

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

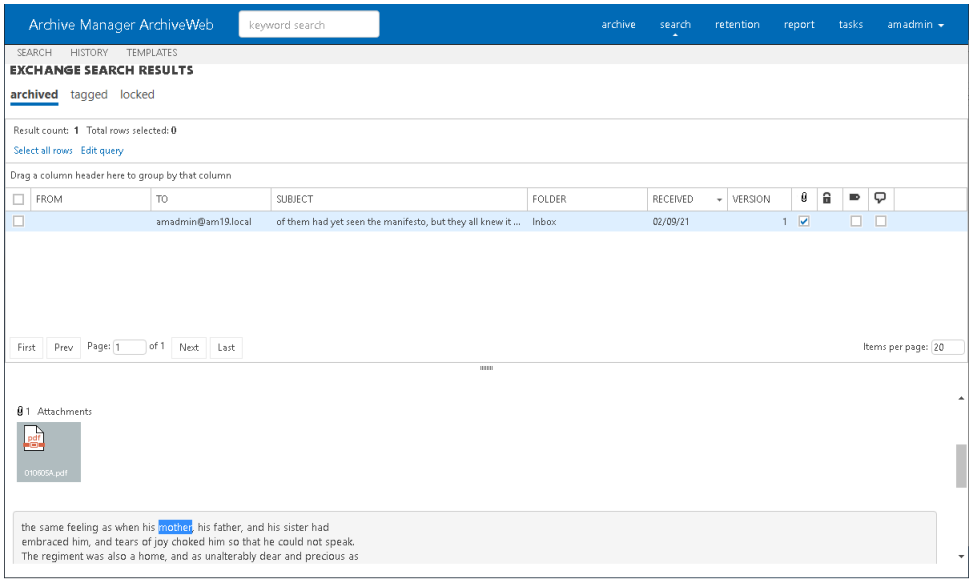
Example

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



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



Search History

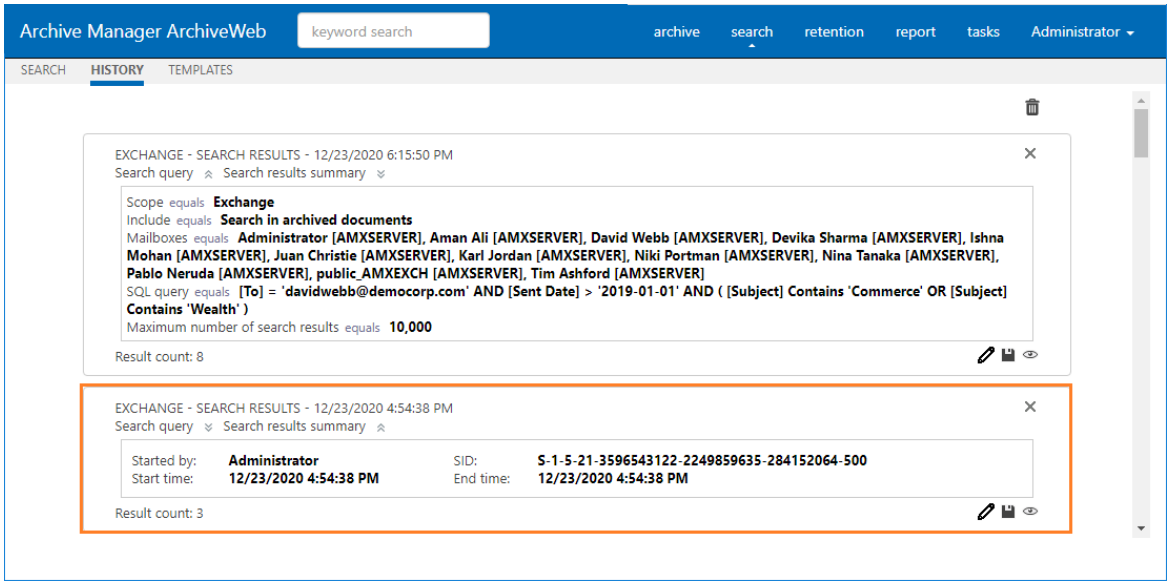
Every search in ArchiveWeb is logged and displayed in the **History** page. Search history is stored in the search history cache separately for each logged in user who runs a search. Each search history log entry indicates the search type (Exchange, File or Keyword) and the start date and time of the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

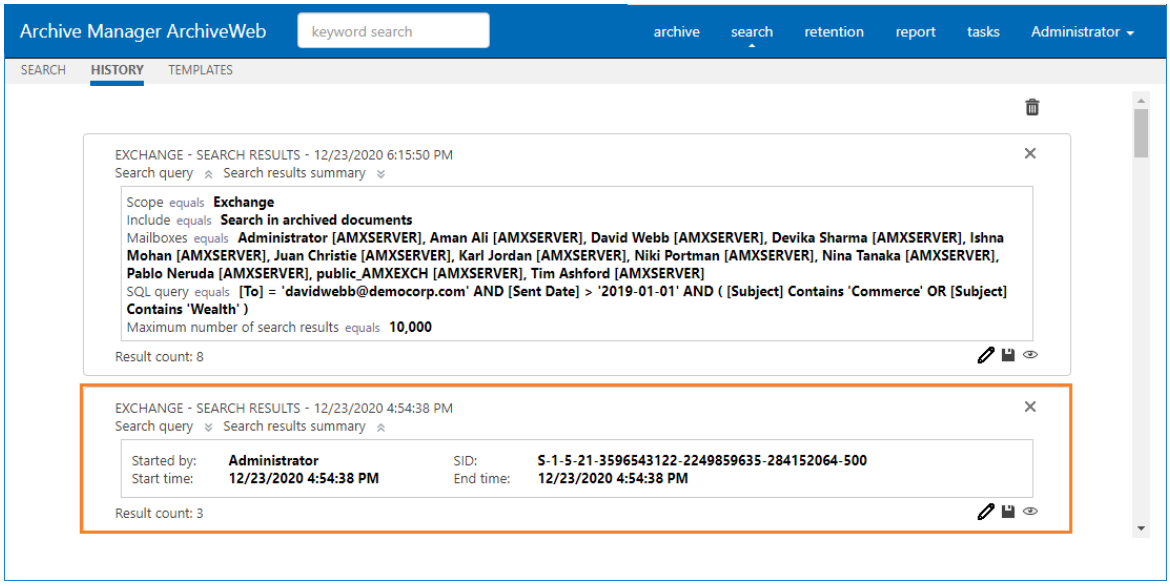
c. **SID** - unique search identifier.

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

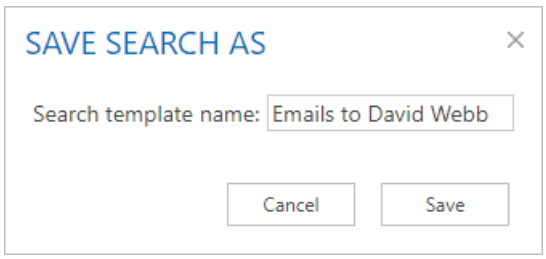
1. Click **Search** on the main menu and then click **History**.
2. Locate the search you want to review.
3. Click 👁 to rerun the search. The search results page will open with the search results.

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\Quest\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 SQLITE files in a cache folder. The default location is `C:\Program Files (x86)\Quest\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\Quest\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>
```

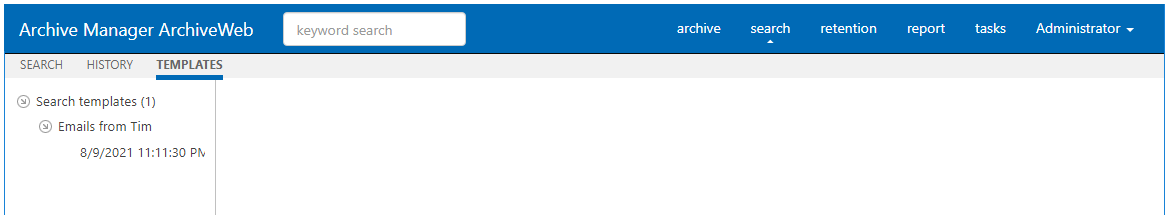
3. Create a new **SearchHistory** section (if it does not exist)

```
<?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.

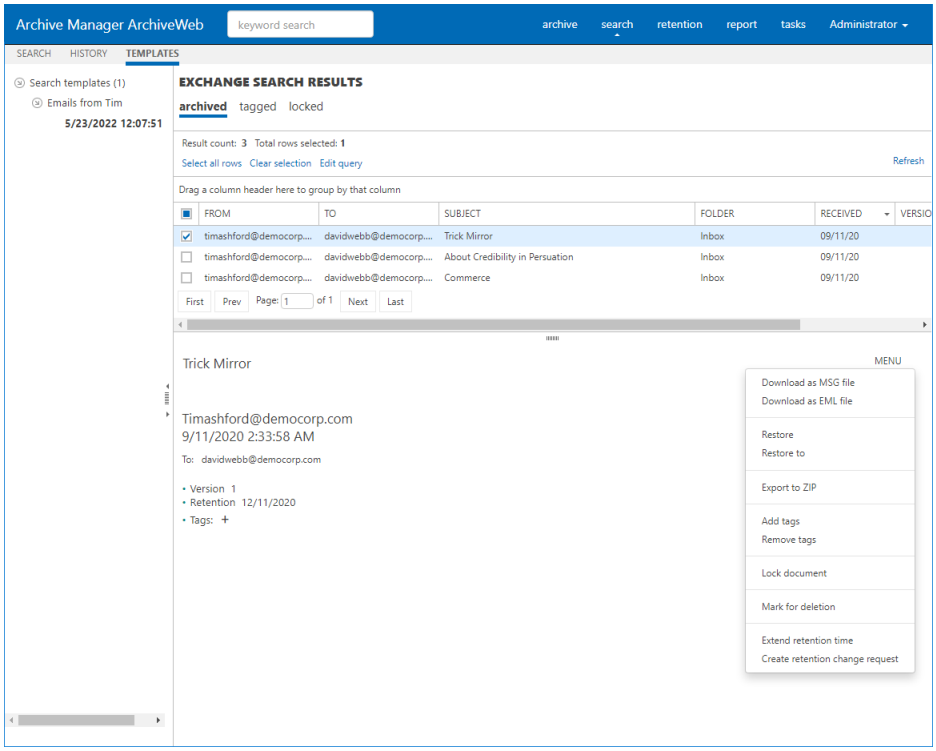
Search Templates

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.

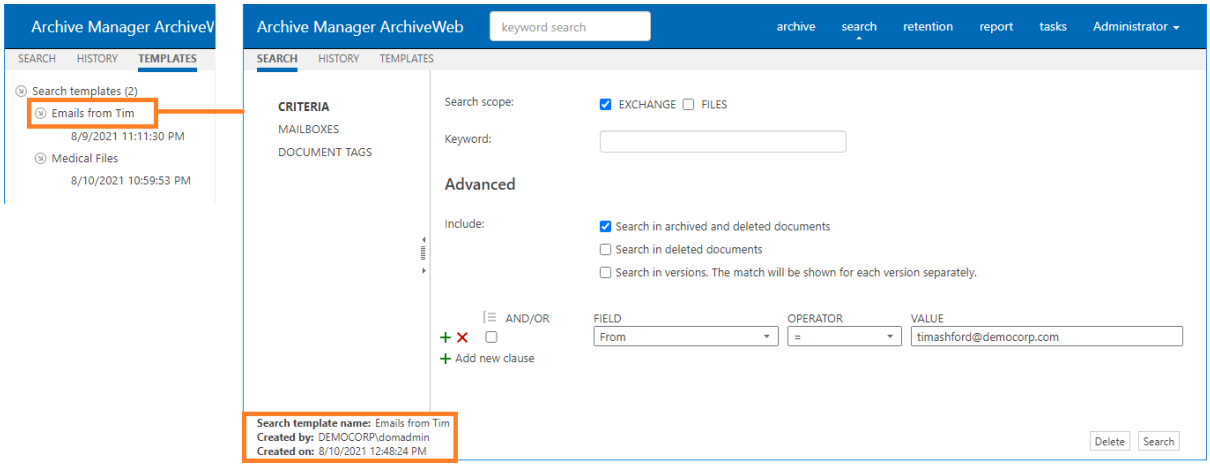
- **Create retention change request** – send a request to the approving person for selected item deletion or increased retention time when it can't be deleted from the archive. The *Approver* who is the person with adequate permission in Archive Manager, will receive the request through email notification 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



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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 form 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.)

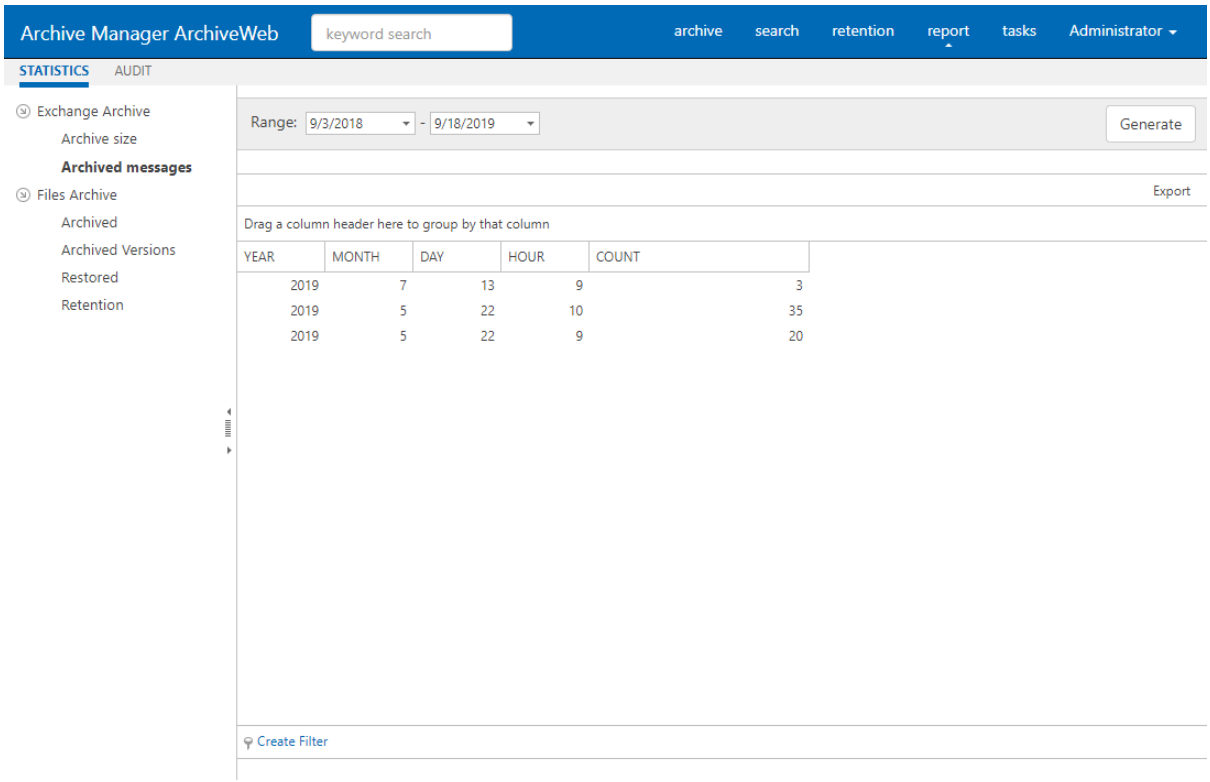
NOTE: DATE RANGE SELECTION IS ALSO POSSIBLE (TO IMPROVE PERFORMANCE). The statistics can be generated also in Archive Manager for Exchange Enterprise Manager.

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

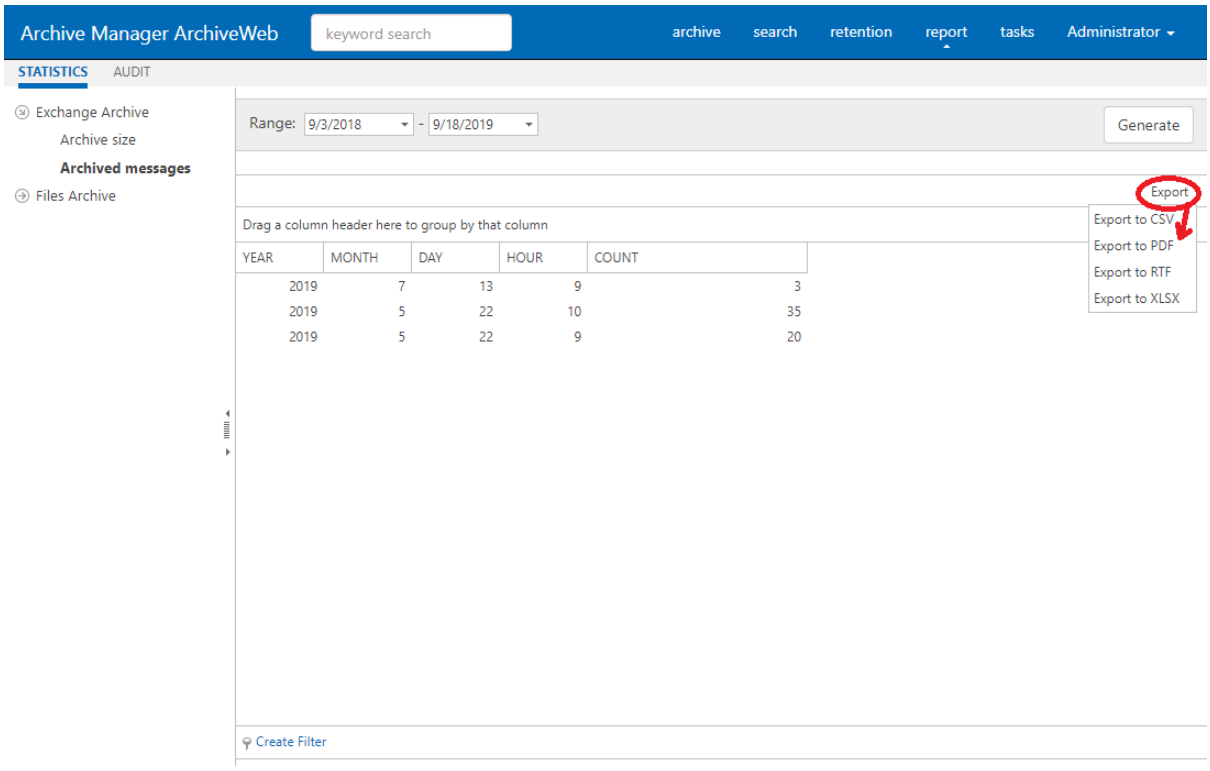
NOTE: The statistics can be generated also in Archive Manager for Files Enterprise Manager.



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.



Audit tab

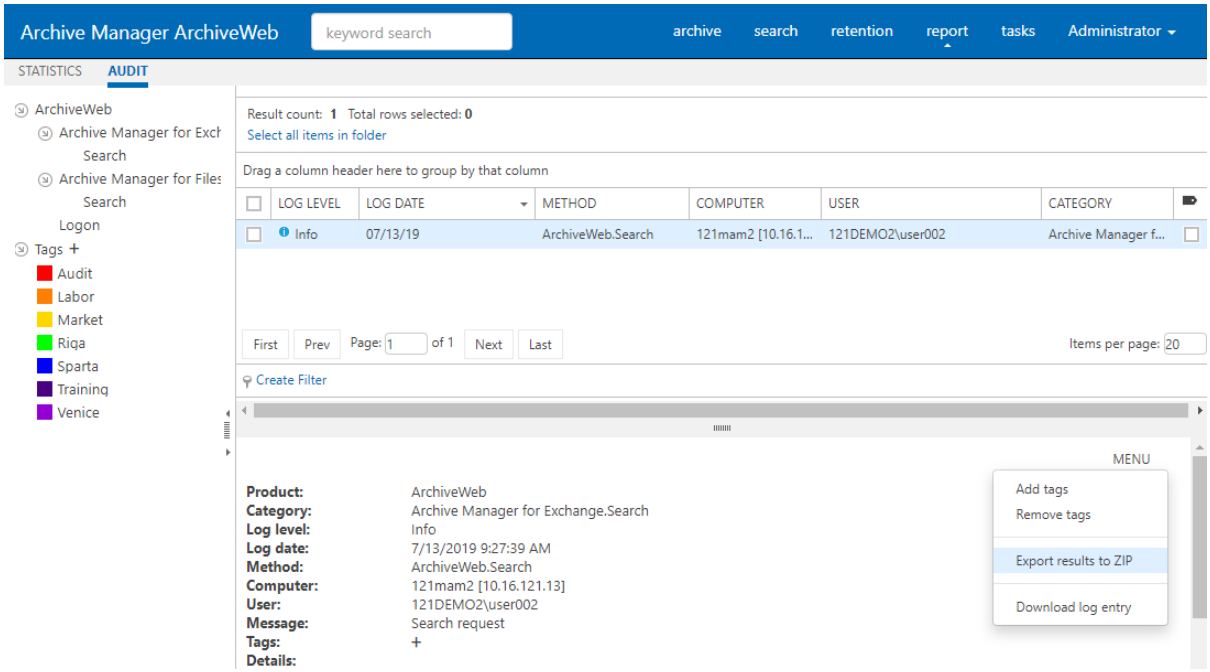
This tab is accessible if:

- 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.



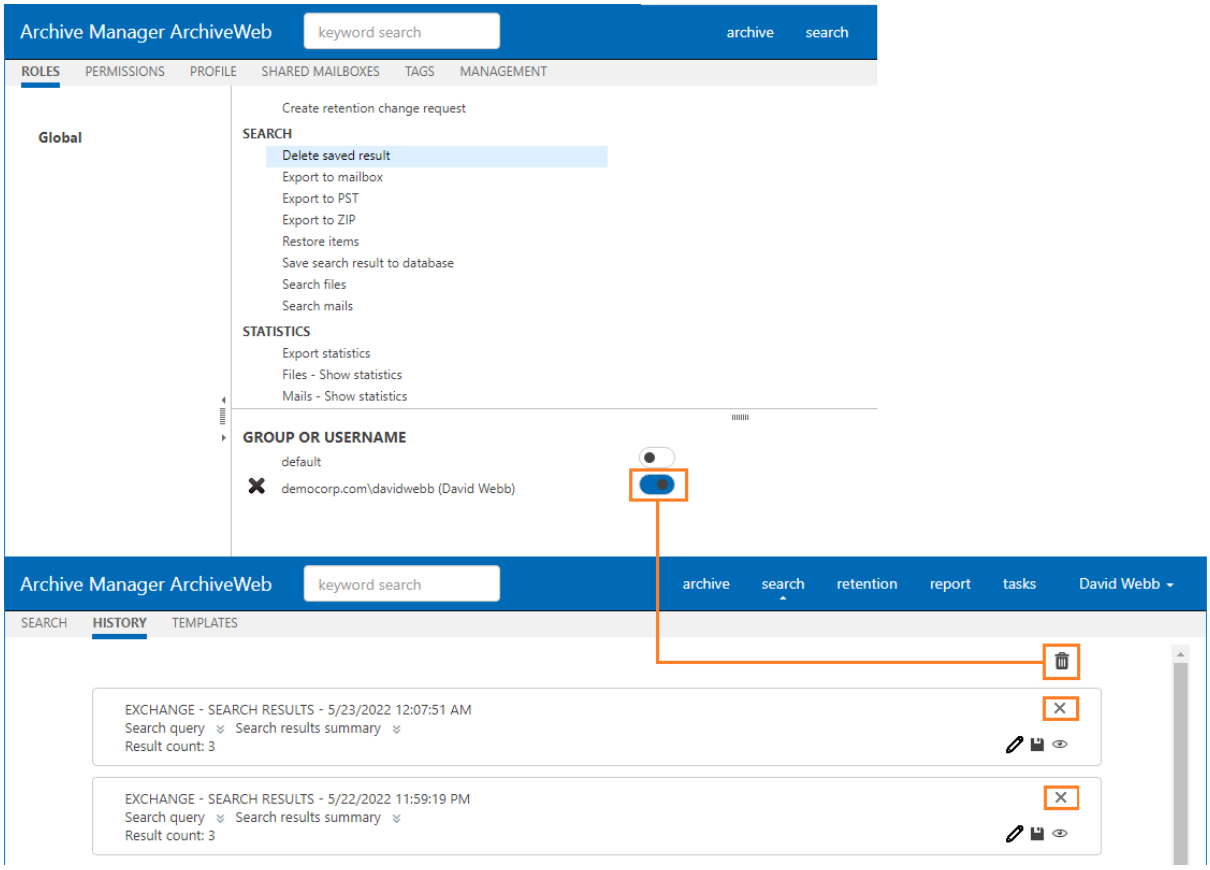
The log entries of the selected action are displayed in the main pane. Data of the log entry selected in the main pane are displayed below the list view (see the screenshot above).

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.

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

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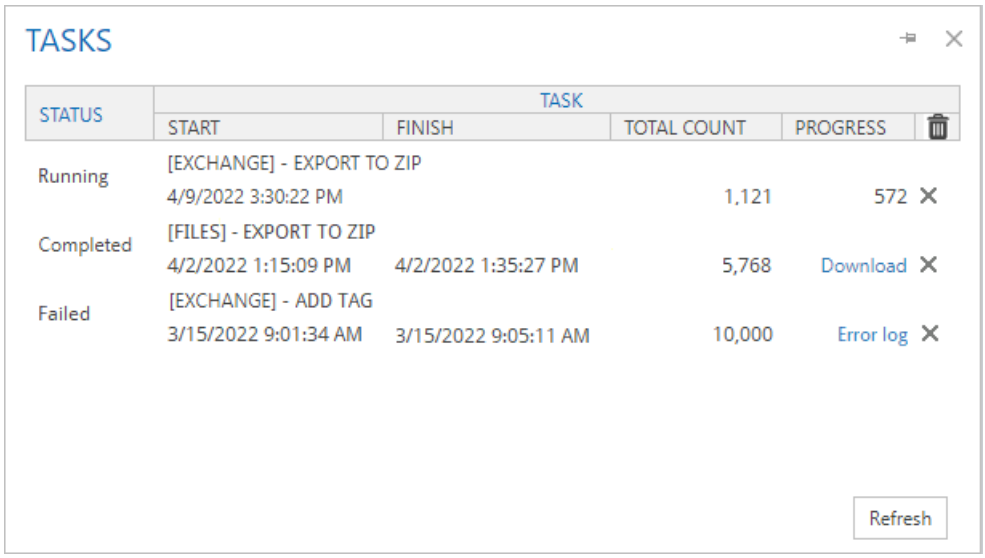
Tasks

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 are started). Completed and failed tasks are listed with the most recently completed task listed first.



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.

11

Addendum

- Troubleshooting
- List of Default ArchiveWeb Permissions

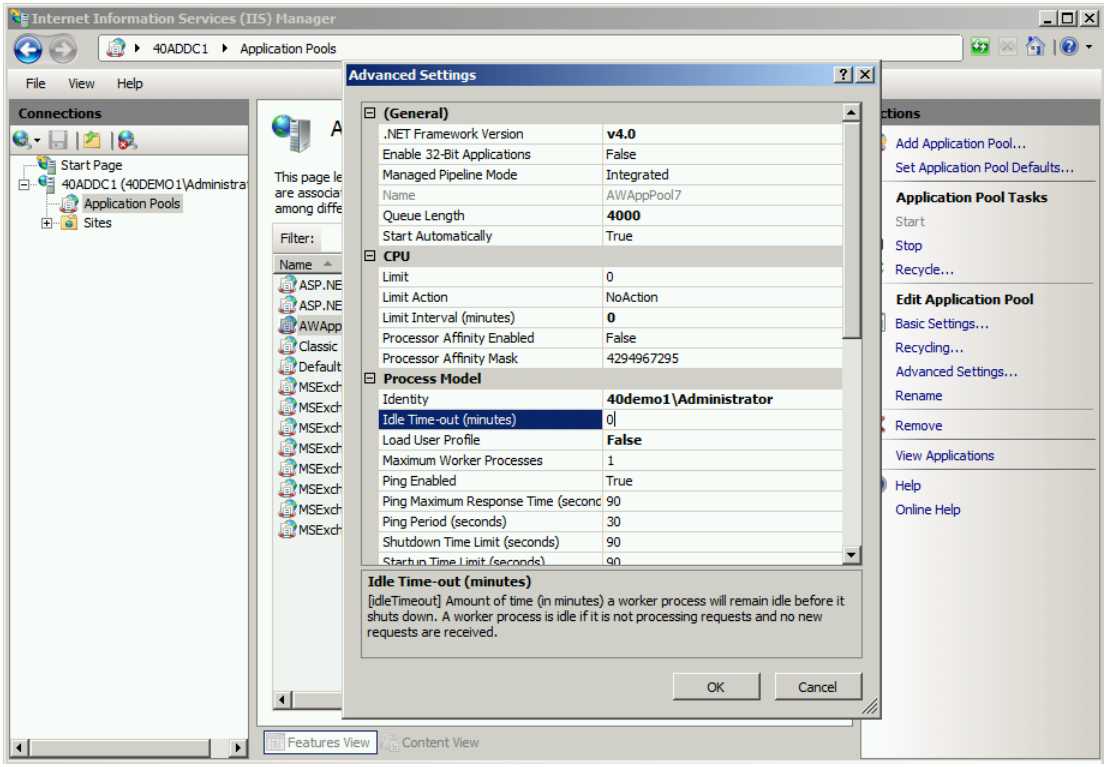
Export Tasks IIS Settings Suggestions

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.

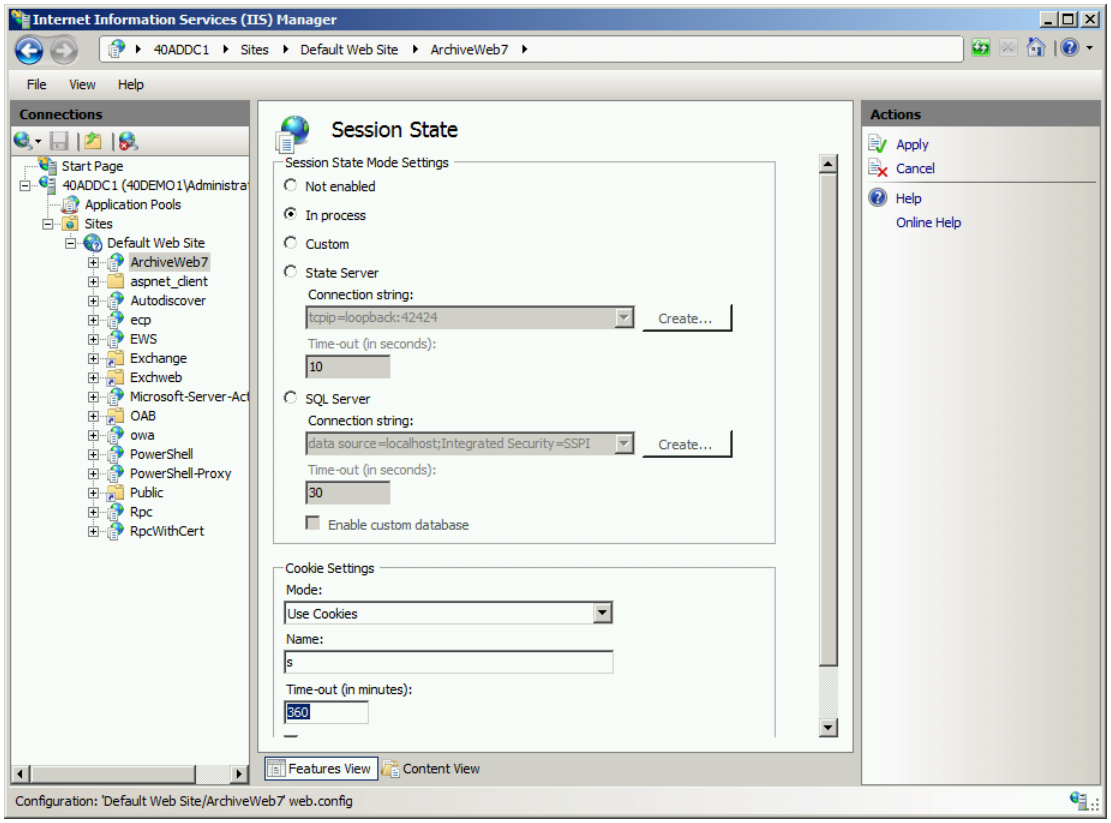


Web Sites - Session Time-Out

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\Framewrok\v4.0.30319\iisreset
```

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

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