

Metalogix® Archive Manager for Exchange 8.3

## **Outlook Add-in User Guide**



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### Legend

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

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

Metalogix<sup>®</sup> Archive Manager for Exchange

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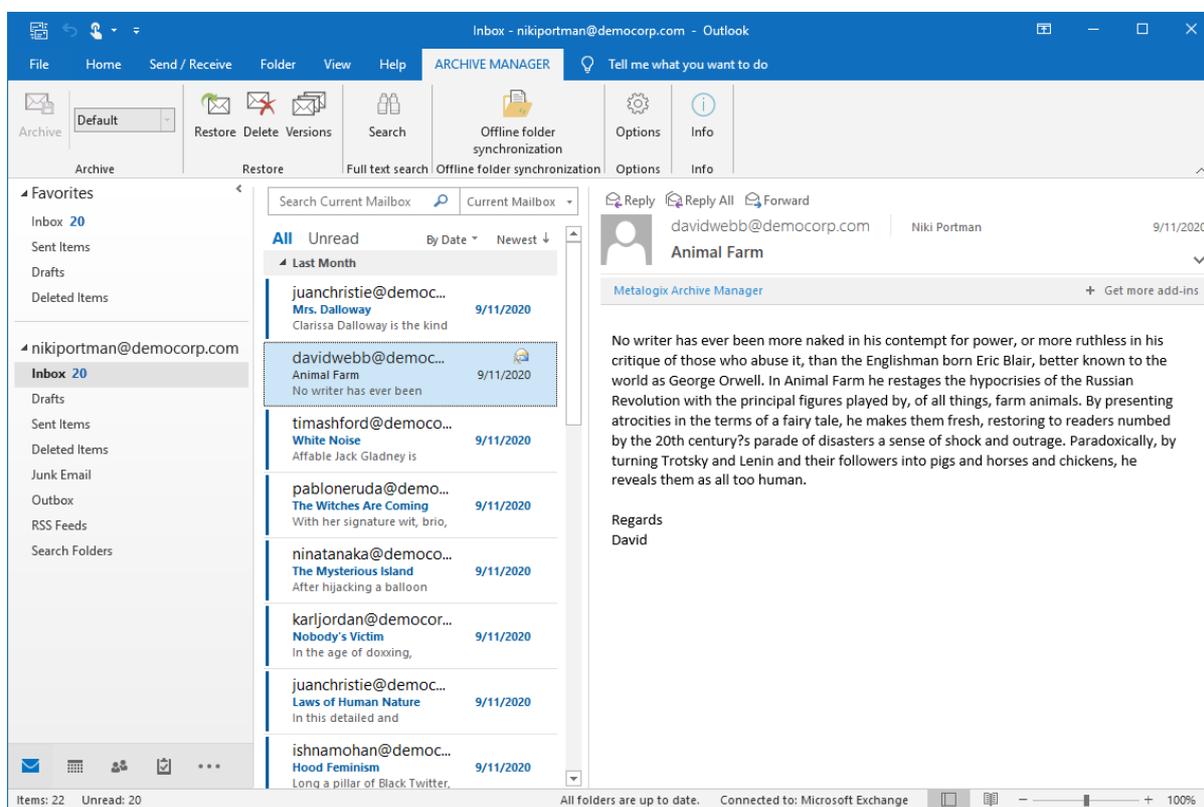
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# Introduction

The Metalogix Archive Manager Outlook Add-in offers end users the capability to archive, retrieve, restore and search for archived email items directly from the Outlook client installed on their computers. This guide describes the all these features and other capabilities of the Outlook Add-in.

When the Outlook Add-in is installed, the **Archive Manager** tab appears in the Outlook toolbar. The various functions available in the toolbar ribbon are shown in the illustration below. For more information about the installation and permission settings that control the functions in the ribbon, see the *Metalogix Archive Manager for Exchange 8.3 Outlook Add-in Installation Guide*.



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

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

Icon	Description
	Archived email that has been forwarded



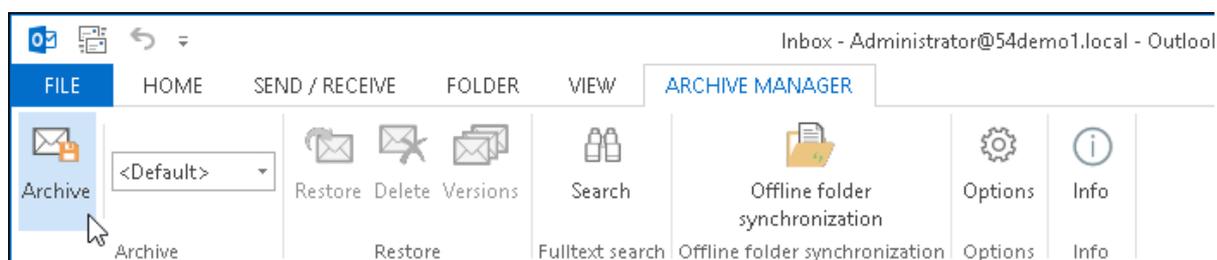
**NOTE:** When you open Outlook for the first time after installing the Archive Manager Outlook Add-in, it will take longer than usual because the Add-in is loaded and configured automatically. When you open Outlook the next time, the interval will be shorter. The Archive Manager toolbar is also listed in the **File > Options > Customize Ribbon** window. All Outlook Add-in actions are logged to a log file located in the `%AppData%\Metalogix Software\Archive Manager\Log\Archive Manager` folder.

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

## Archiving emails

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

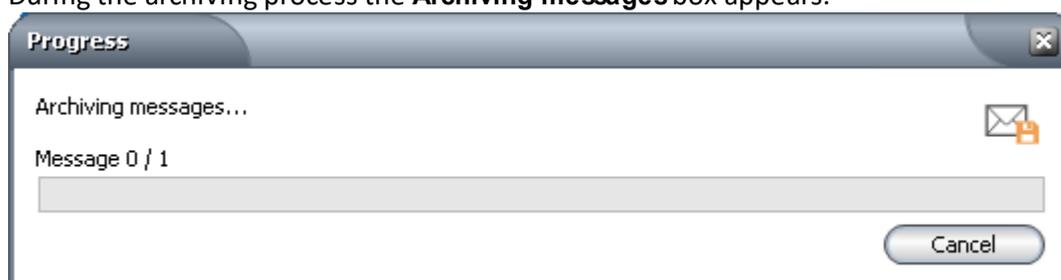
Selected e-mails and documents are archived by clicking the **Archive** command on the **Archive Manager** tab



In the adjoining drop-down box you can choose which retention category will be used when archiving the selected email. (Retention category defines attributes of archiving, i.e. the time for which the item will be archived, if the shortcut should be created etc. For more information on retention categories see the “Archive Manager for Exchange Administration Guide”.)

You may also archive e-mails and documents from a **Public Folders** folder. For that, however, you need to be assigned certain rights. Those rights can be assigned in **Archive Manager for Exchange Administration Center (AMAC)**.

During the archiving process the **Archiving messages** box appears.

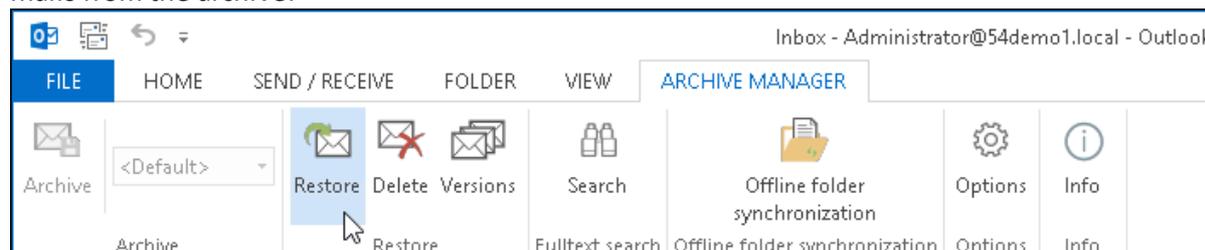


The archived e-mail can be opened simply by double-clicking. It can take some time while Outlook retrieves respective e-mails from the archive.



## Restoring archived emails

By using the **Restore** command on the **Archive Manager** tab, you can restore selected archived e-mails from the archive.



Upon clicking on the **Restore** icon, the following dialog box appears.



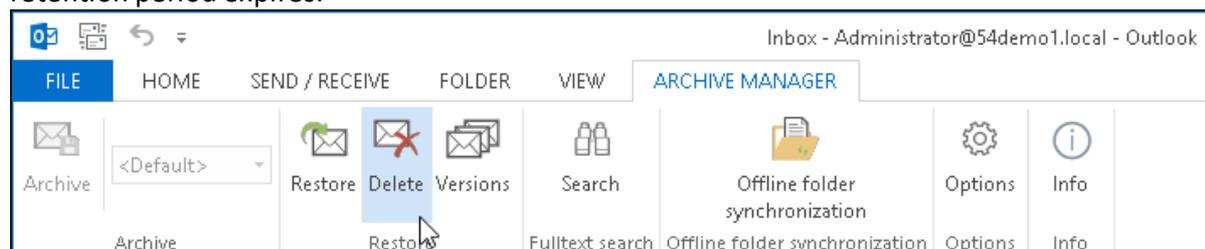
The **Delete from archive** check box points to the selected item in the archive. By selecting this check box you will mark the selected e-mails in the archive for deletion. They will be deleted from archive when their retention period expires. However, it is still possible to find these archived emails via Archive Manager Search function (e.g. ArchiveWeb) until they are physically deleted from the archive upon expiration of their retention period.

By not selecting the **Delete from archive** check box, the respective e-mail will be restored only and it will not be marked in the archive for deletion. Its shortcut will be replaced on the MS Exchange Server with the original e-mail.

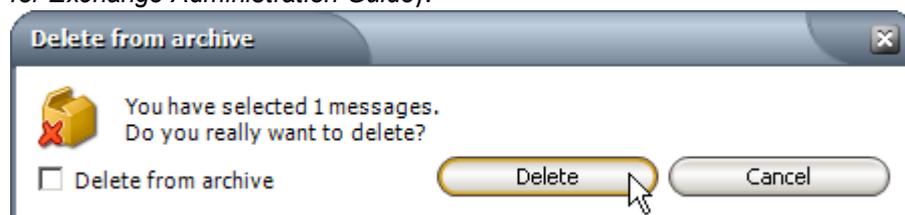
**i** **NOTE:** If you delete archived e-mails from your mailbox using the Outlook **Delete** functionality (i.e. no Archive Manager functionality), it is still possible to find them via Archive Manager Search. However, only the administrator of Archive Manager can restore them back into the mailbox.

## Deleting archived emails

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



By not selecting the **Delete from archive** check box only the respective e-mail shortcut will be deleted from the Exchange Server. However, it will not be marked for deletion in the archive. Such item is displayed as lost in the **AMAC**. It can be restored by the administrator during its retention period until the Shortcut synchronization job runs (see the *Metalogix Archive Manager for Exchange Administration Guide*).



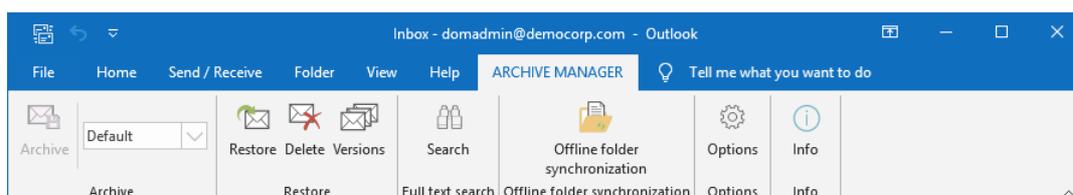
# Search

In this chapter:

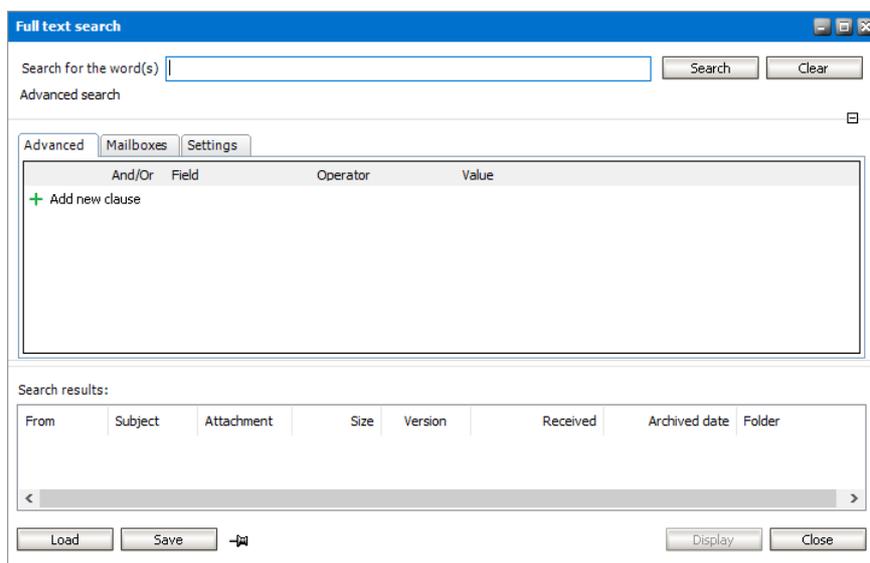
- [Full-text Search](#)
- [Advanced Search](#)

## Full-text Search

Full-text search is used for searching through archived e-mails and attachments. It is possible to search for text in pictures (OCR search) although this technology has some limitations, e.g. too small text may not be correctly recognized. Full-text search can be used even for searching through archived and subsequently restored mails. This search is accessible from the **Archive Manager** tab in Outlook.



By clicking on the **Search** on the **Archive Manager** tab, the following window will be displayed.

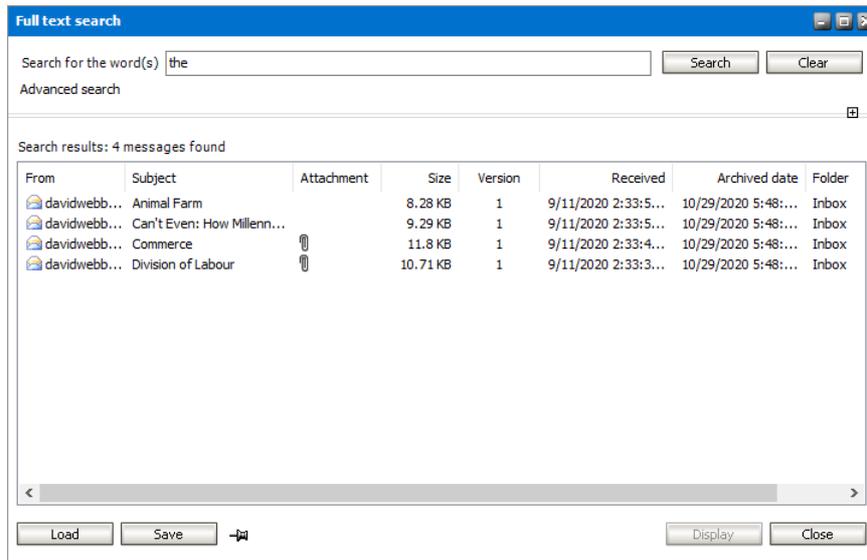


The entered keyword is searched in the:

- subject
- email body

- attachments

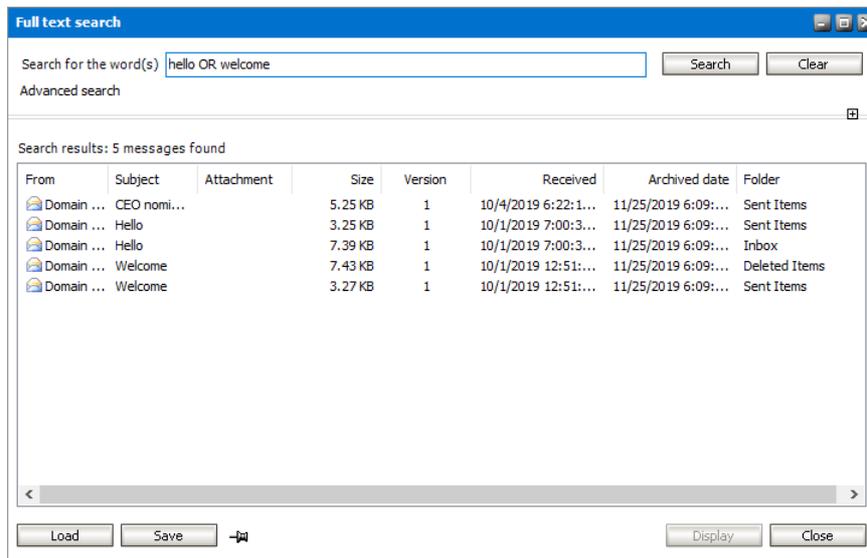
The result of the search is then displayed in the Search results window



You can retrieve an archived email by either selecting the email and clicking **Display** or by double-clicking the email.

## Search Expressions

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



### Example 1:

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

## Example 2:

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

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

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

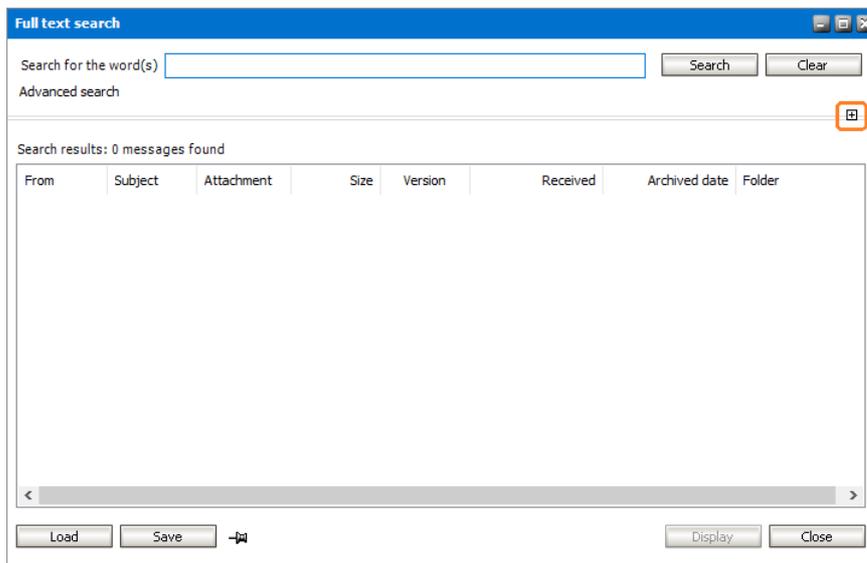
You can use the Save / Load buttons to save / load search criteria you have specified. It is especially useful e.g. when you have set special settings for Advanced search (see further).

# Advanced Search

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

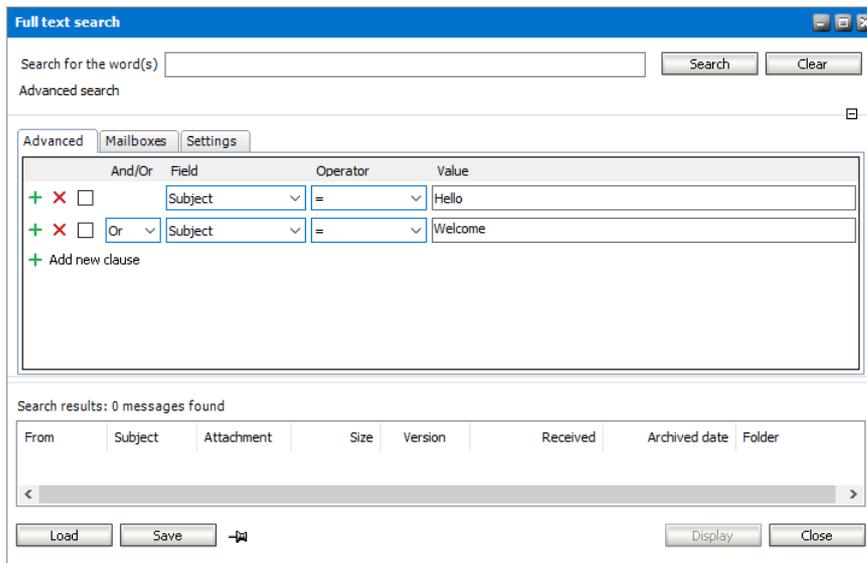
## Steps to use advanced search

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



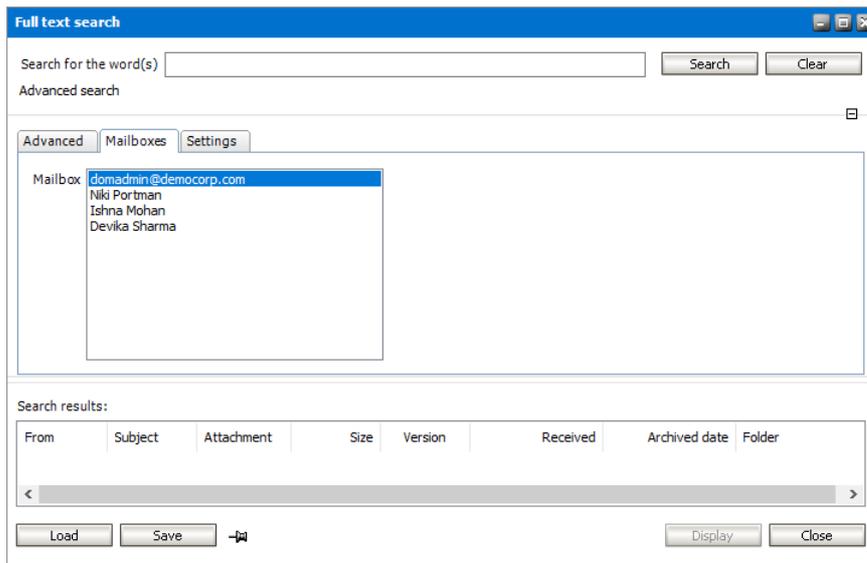
2. Click the **Advanced** tab.
3. Click **Add new clause** and enter the search criteria using the fields as described below:
  - a. **Field** - click the drop down to select the property of the email to be searched. For example, select Subject as the field to search.
  - b. **Operator** - click the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

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

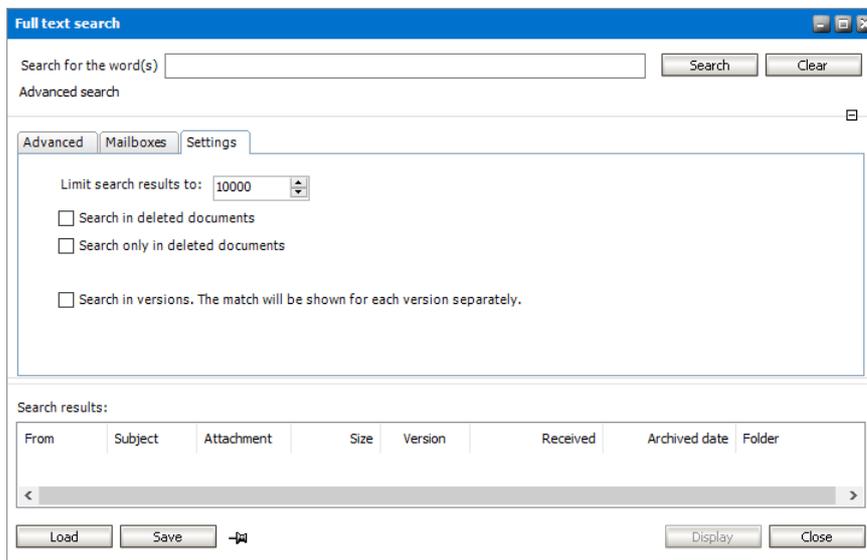


5. To view the scope of the search on mailboxes, click the **Mailboxes** tab. By default only the current mailbox is added. You must select more mailboxes manually if you want to search additional mailboxes.

- i NOTE:** If you do not see additional mailboxes, the Administrator must follow the steps below to expand the search scope to more mailboxes:
- a. Open the Address Book Manager in the Archive Manager for Exchange Administration Center (AMAC).
  - b. Click **Mailboxes** to open the list of mailboxes.
  - c. Right-click the mailbox you want to add and select **Permissions** from the context menu. The *Mailbox rights* window opens.
  - d. Click **Add** and select the Outlook user who will run the search. Then click **OK** to close the windows.
  - e. Open the Advanced search window again and click the **Mailboxes** tab to view the additional mailboxes

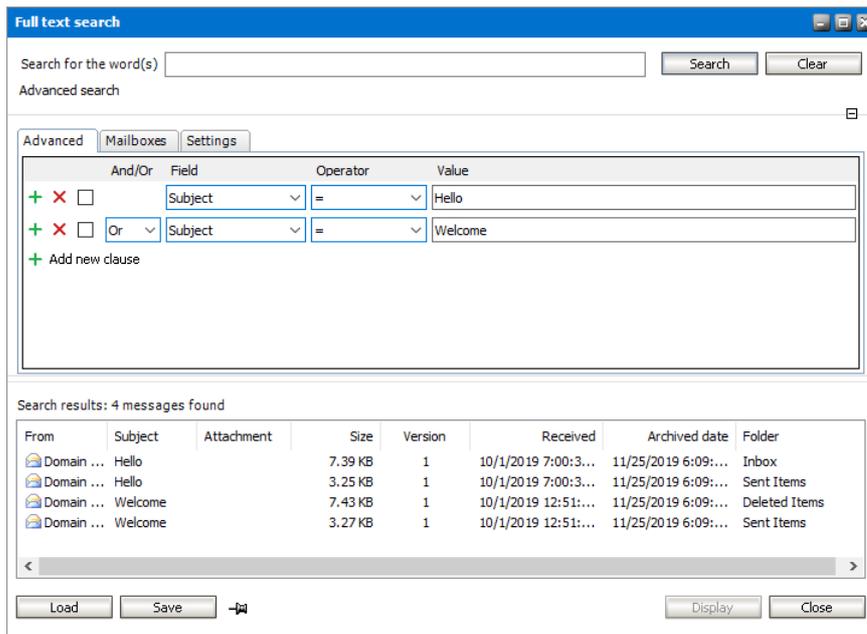


- To set the search scope on email item types, click the **Settings** tab.



Configure the settings as described below:

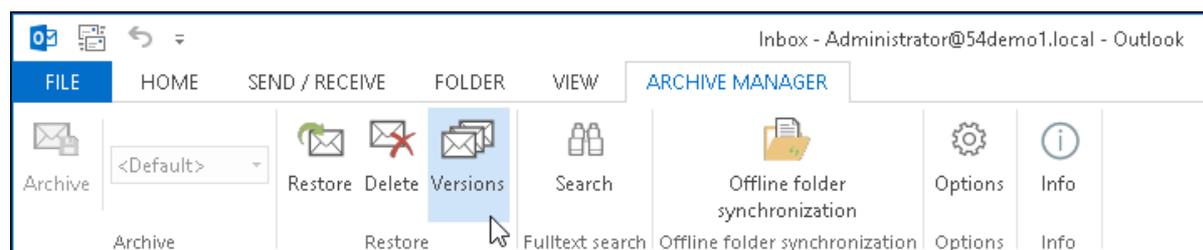
- Limit search results to** - the number of emails that are returned in the search result list.
  - Search in deleted documents** - select this check box to search through emails that are marked for deletion and the latest version of archived emails.
  - Search only in deleted documents** - select this check box to exclusively search through emails that are marked for deletion. All other archived emails will be ignored.
  - Search in versions** - select this check box to search through all versions of the archived emails and each match will be returned in the result list.
- Click **Search** to search for archived emails based on the selection criteria, the mailboxes specified and the settings that are applied.



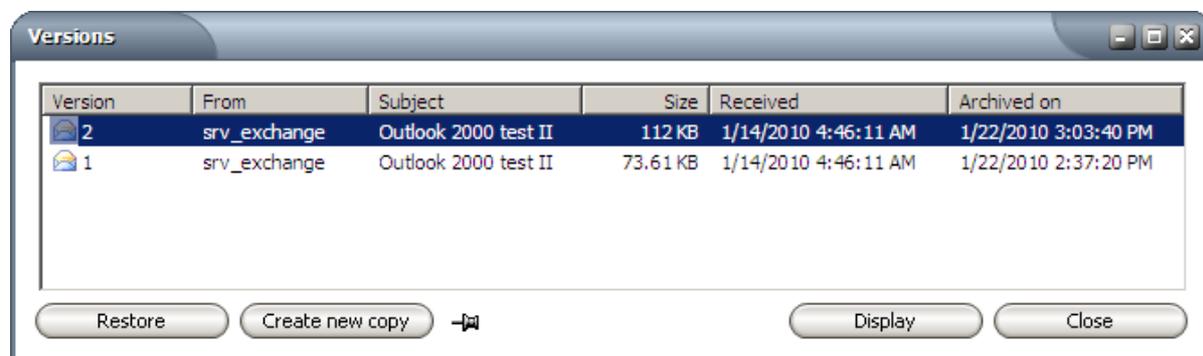
- Click **Save** to save the search criteria as an XML file. The saved search criteria does not include the list of mailboxes used in the search scope. Click **Load** to load a previously save search criteria.

## Versions

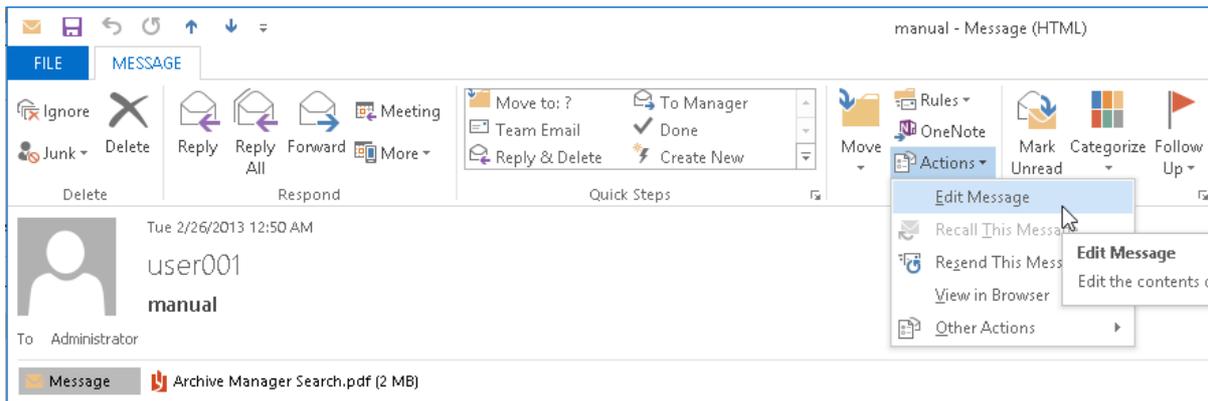
Each time you edit an archived e-mail a new version of that e-mail is created in the HSM Store. Different versions of an archived e-mail can be checked in the **Versions** window. To do so just click the **Versions** command on the **Archive Manager** tab.



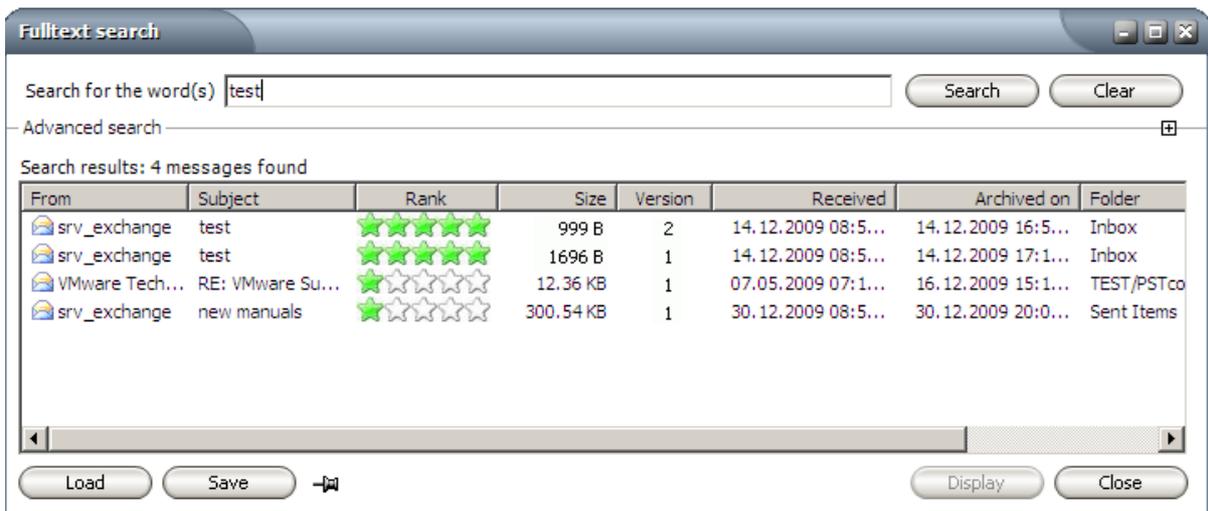
The **Versions** window appears, showing all the versions of the respective archived e-mail. You can choose to display each version (by clicking the **Display** button), restore them or create a new e-mail from the selected version. By restoring a selected version, the respective version of that e-mail will be retrieved and deleted (optional) from the archive. By selecting a version and then clicking on the **Create new copy** button you create a new e-mail based on that respective version. This newly created e-mail is not archived.



If you want to make a new version of an archived e-mail, just open it for editing. After saving the changes, a new version is saved in the archive.



The full-text search engine searches for keywords in every version of an e-mail. Therefore search results may contain more than one version of the same e-mail.



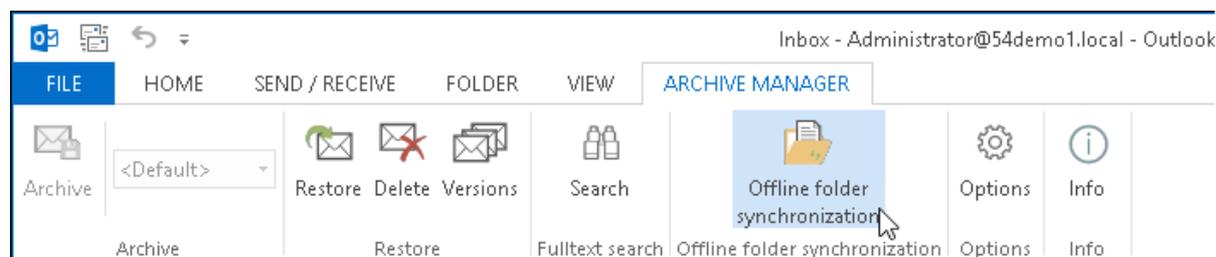
# Offline synchronization

Working with archived e-mails is possible even when you use your MS Exchange Server mailbox offline.

Before switching to offline mode you must synchronize your Outlook mailbox with the MS Exchange Server. If you also plan to work with your archived e-mails you need to synchronize in Archive Manager as well.

To work offline with archived e-mails:

1. run Outlook synchronization
2. synchronize offline with Archive Manager (click on the **Archive Manager** tab and then on **Offline Folder Synchronization**)



**i** | **NOTE:** Auto synchronization is also possible. See the “Cache settings” section.

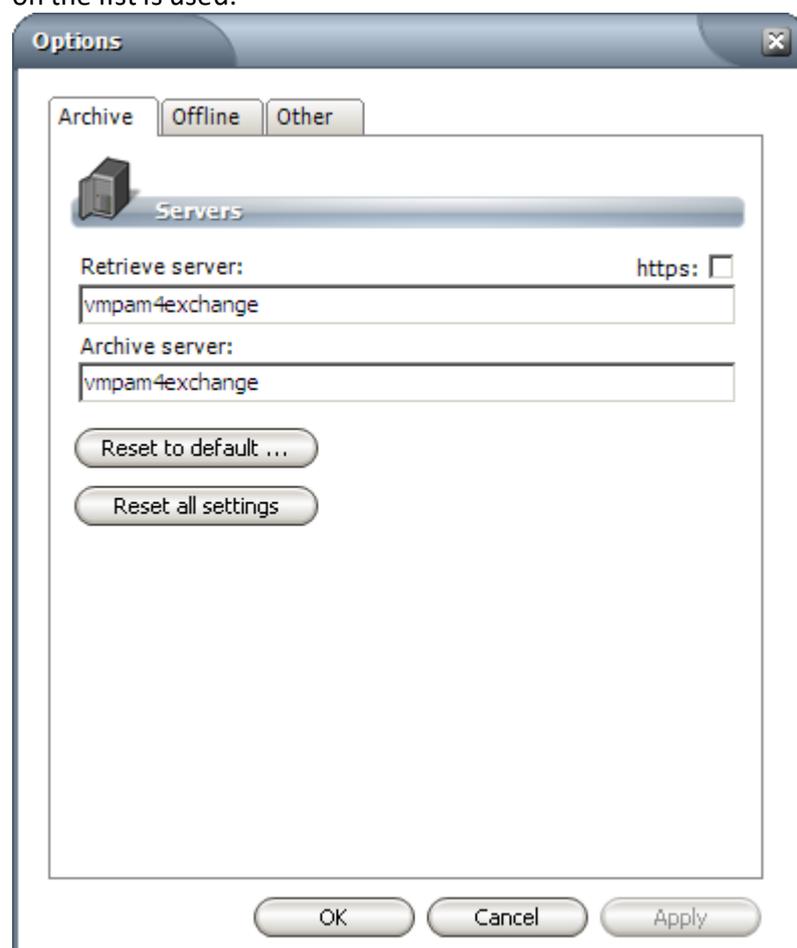
After working offline and reconnecting to your MS Exchange Server, first you need to synchronize your Outlook mailbox with MS Exchange Server. Then you need to synchronize your Outlook mailbox with Archive Manager Server as well – by doing so you will update your Outlook mailbox with its current status on the MS Exchange Server.

## Options

The **Options** window has three tabs - **Archive**, **Offline**, and **Other**.

On the **Archive** tab the location of Retrieve and Archive servers can be verified. To achieve load balancing, more than one Archive Manager server could be configured during installation. In that case the Retrieve server is used only for retrieving and Archive server for archiving. However, retrieve and archive server could be the same machine.

When Add-in is installed, the primary retrieve server and archive server are defined. (In some cases Archive and Retrieve Server fields may be blank. In that case, please fill in the server names manually.) The Add-in loads the list of available servers from the primary archive server. When retrieve is performed, the primary retrieve server is used, if this is not available, the next server on the list is used.

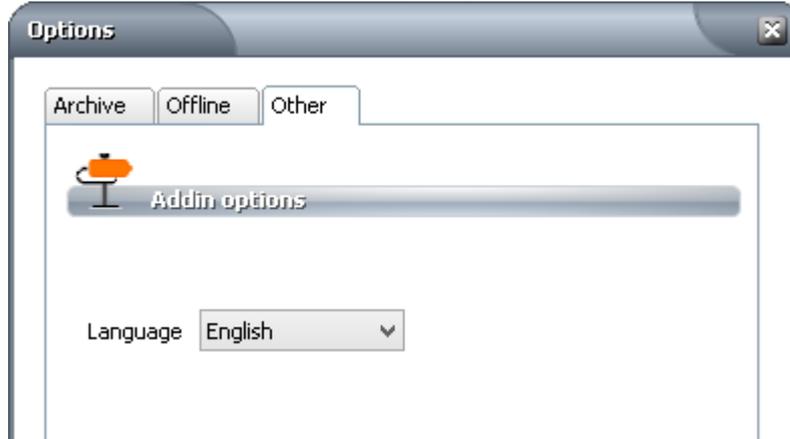


In case that HTTPS is used in your environment, check the **https** check box.

When **Reset to default** is clicked, Archive and Retrieve server values are reset to default.

When **Reset all settings** is clicked, all settings on all tabs will be reset to default.

The **Offline** tab is used for configuring the cache settings – for more details see the next section.

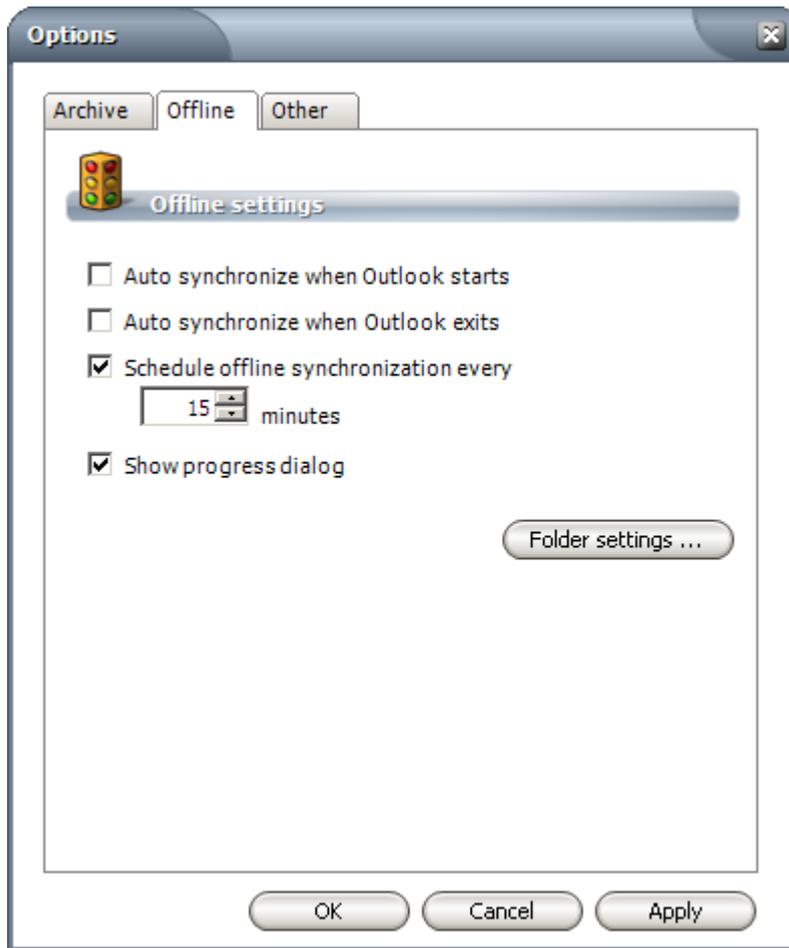


The **Other** tab is used for selecting preferred language for Addin.

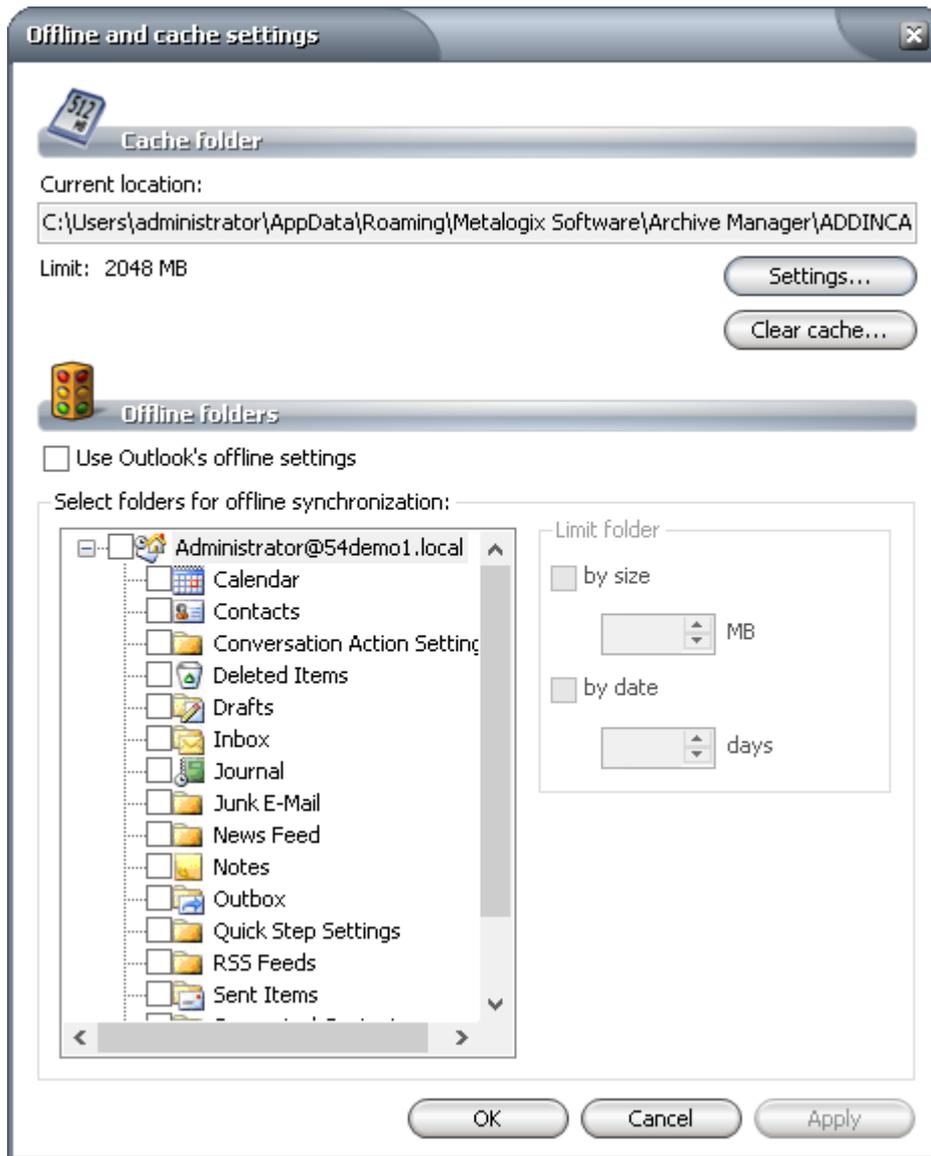
## Cache settings

On the **Offline** tab you can set the time for automatic offline synchronization. Just select either the **Auto synchronize when Outlook starts** or the **Auto synchronize when Outlook exits** option. You can even schedule offline synchronization to run every “x” minutes which is useful e.g. in case of unexpected network breakdown. To do so, check **Schedule offline synchronization every** check box and enter the desired time interval in the **minutes** text box.

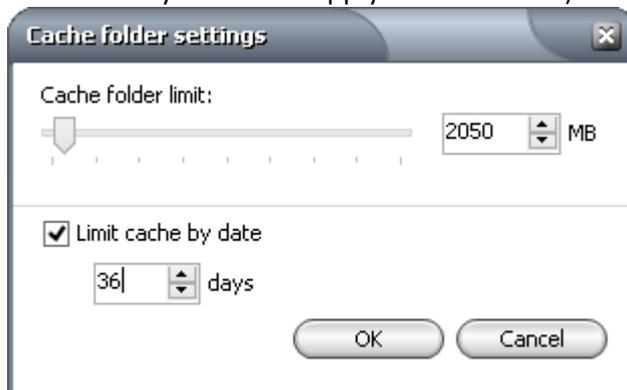
If you check the **Show progress dialog** check box, the dialog will pop up whenever the scheduled offline synchronization is running.



When clicking on the **Folder settings** button, the **Offline and cache settings** window is displayed. Here you may check the current location of the Add-in Cache and also specify cache settings.



You may clear the cache folder when clicking on the **Clear cache** button. By clicking on the **Settings** button the **Cache folder settings** window appears. Here you can set the global size limit OR the global date limit for the cache folder. (Do not forget to check the **Limit cache by date** check box if you want to apply the date limit.)



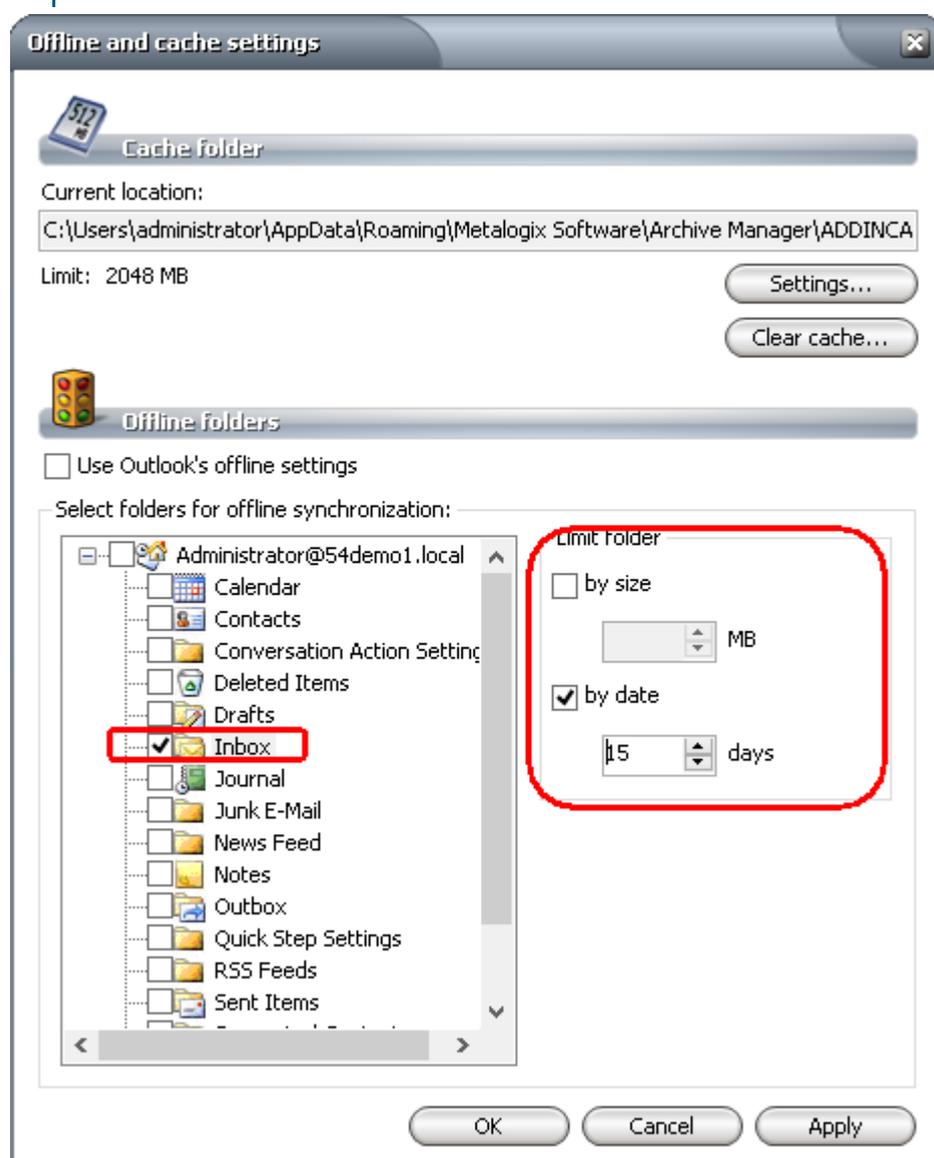
In our example the maximum size of the cache is set to 2050 MB. However, the Limit cache by date is checked and thus the cache size limit is **ignored**.

The global date limit is set to 730 days, i.e. emails older than 730 days will not be cached at offline folder synchronization. User working offline will be able to see the shortcuts of all archived emails but will be able to work only with those which were received in last 730 days.

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

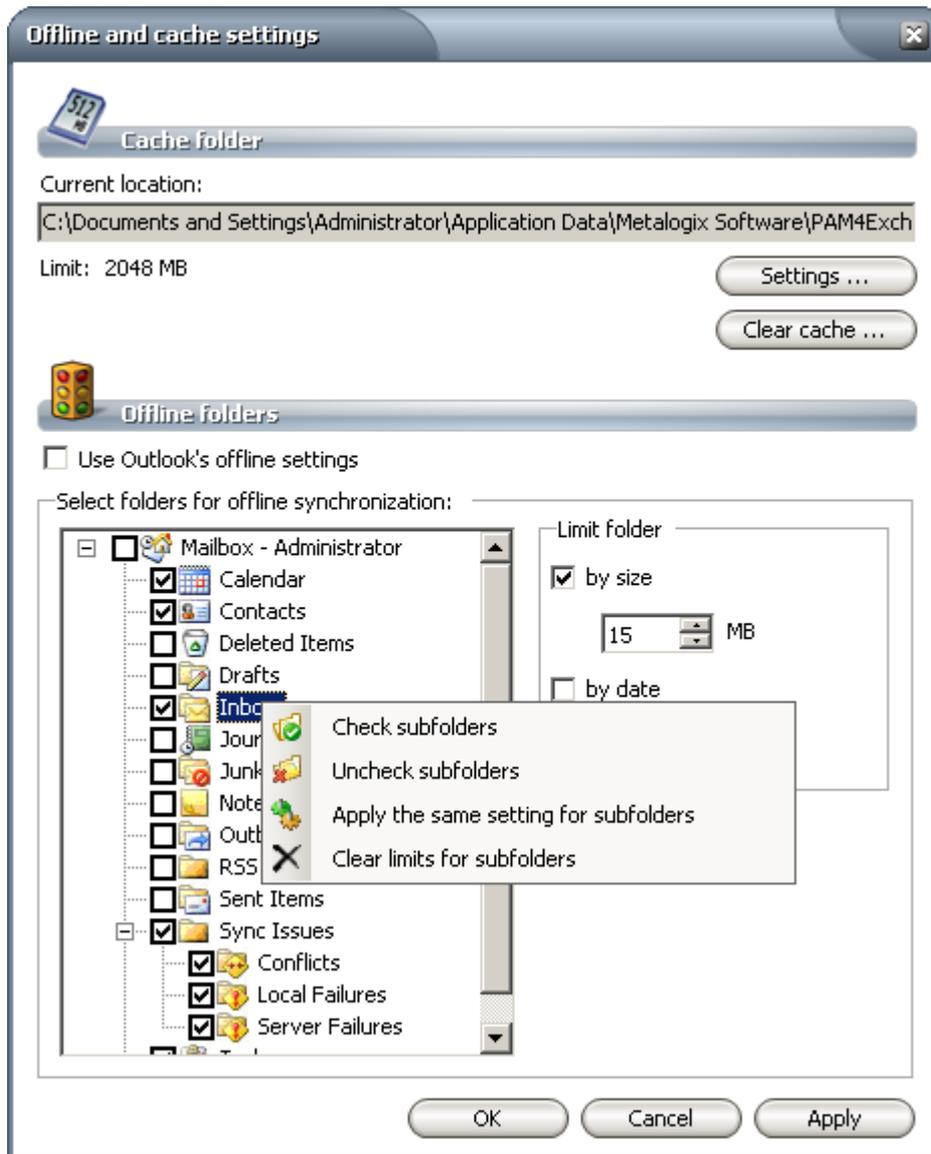
In the **Offline folders** section further configure the offline synchronization. You can define which folders you want to synchronize. For each selected folder you may choose if you want to set a limit value for its size or limit it by date, e.g. items received within last 15 days will be cached.

**i** **NOTE:** The local size and date limits (i.e. limits defined for individual folders) are applicable only within the range of global limits specified in the *Cache folder settings* as described above.



If **Use Outlook's offline settings** is checked, Add-in synchronize folders that are defined in Outlook settings. However, it is possible to apply size or date limit for individual folders. To select your own folders for synchronization you have to unselect the **Use Outlook's offline settings** check box. Then select the desired folders in the list.

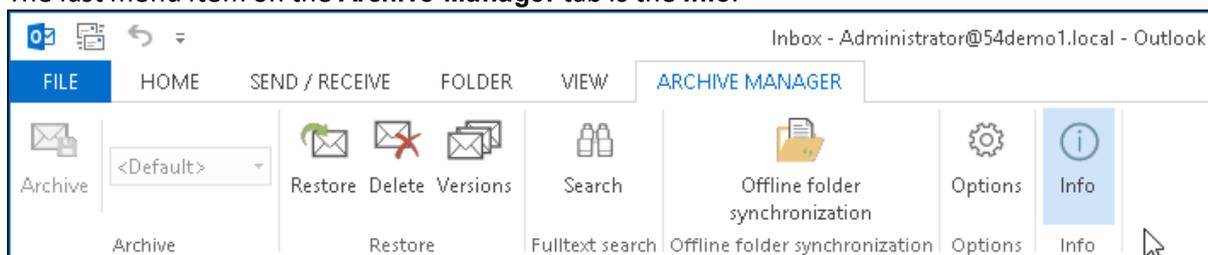
To handle all subfolders of individual folders comfortably, right-click the desired folder to unfold its context menu:



Click **Apply the same settings for subfolders** command to copy folder settings to its subfolders.

**i** **NOTE:** If you have set the size limit (e.g. to 100MB for Inbox) and clicked **Apply the same settings for subfolders** command on the context menu of the selected folder, this size limit is set for every subfolder (i.e. 100MB for Subfolder1, 100MB for Subfolder2, ...).

The last menu item on the **Archive Manager** tab is the **Info**.



This displays the current version as well as the current status of the Add-in. If you want to disable (enable) the **Add-in**, just click on the **Disable (Enable)** button. In case your **Add-in** settings have been changed by the administrator (in the **AMAC**) in the meantime, make these changes active by reconnecting to the Archive Manager server. To do so, just click on the **Reconnect** button and click **OK**.



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## About Us

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- 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