Email Archiving Outlook Add-In

ADMINISTRATOR GUIDE

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Installing the Microsoft Outlook Archive Add-in

Customer Administrators can install the Archive Add-in for their end users.

About the Archive Add-in.

Before you install the Archive Add-in, review the system requirements and known incompatibilities.

System Requirements

Supported versions of Microsoft Outlook:

- Microsoft Outlook 2010
- Microsoft Outlook 2007
- Microsoft Outlook 2003

Supported Operating Systems

- Windows 7
- Windows Vista
- Windows XP

NOTE: Windows XP Professional, 64 is NOT supported.

Known Incompatibilities

The Archive Add-In may not work with other 3rd-party Outlook plug-ins:

- FreewarePrimoPDF
- Outlook 2007 Business Contact Manager
- Xobni

Install the Archive Add-in from the desktop.

Customer Administrators can install the Archive Add-in locally by running the msi file directly from the desktop.

Before you begin

1 Install Microsoft Outlook.
2 Create the Outlook user account.
3 Close Outlook.
4 Turn off any anti-virus software.
5 Sign into the computer as an administrator.
6 Uninstall previous versions of the add-in.

The Archive Add-in installation process will automatically install supporting software as necessary.

Task

1 Run the set-up.

a Turn off any anti-virus software.

b Copy the add-in file to the target computer.

c Sign into the computer as an administrator.

d Close Outlook.

e Double-click the add-in file to open it, and follow the instructions.

If the installation program needs to install the .NET Framework package, the installation may take up to an hour to complete.

2 Complete the installation in Outlook.

- Open Outlook by double-clicking your desktop icon.
- Open Outlook by selecting the Start menu.

NOTE: If you are asked to verify the installation, click Install in the message box. Once Outlook is running, it is safe to turn on your anti-virus software. You are now able to search for and view archived email messages in Outlook.

Install the Archive Add-in from the command line.

Customer Administrators can install the Archive Add-in by running the msi from the command line either locally or remotely.

Before you begin

1 Install Microsoft Outlook.

2 Create the Outlook user account.

3 Close Outlook.

4 Turn off any anti-virus software.

5 Sign into the computer as an administrator.

6 Uninstall previous versions of the add-in.

The Archive Add-in installation process will automatically install supporting software as necessary.

Task

1 Open a command prompt.

2 Type the Windows installer command to install the msi:

msiexec /i archiving.msi /quiet

Follow the standard installation steps as necessary

NOTE: For more installation options, view the Windows Installer Help: msiexec /help.

Remove the Archive Add-in.

If you no longer need the Archive Add-in, you can remove it from Outlook by uninstalling it in Windows.

Before you begin

1 Close Outlook before uninstalling a local copy of the Archive Add-in

Task

1 From the desktop, select Start > All Programs > Archive Add-in > Uninstall Archive Add-in.

2 In the Control Panel follow these steps.

a Open the Control Panel in Windows and select Add or Remove Programs.

b Scroll through the list of programs until you find the Archive Add-in.

c Select it and click Remove.

d Click Yes to confirm.

3 From the command line, type.

msiexec /uninstall archiving.msi

NOTE: For more installation options, view the Windows Installer Help: msiexec/help.

The next time you start Outlook, the add-in will no longer be installed.

Troubleshoot the Archive Add-in with Event Viewer.

To help identify problems, search for archiving-related events in Microsoft Event Viewer.

Task

1 Select Start > Control Panel > Administrative Tools > Event Viewer >Application.

2 Look for the keyword “Archiving” in the Source column

Using the Microsoft Outlook Archive Add-in

The Archive Add-in allows you to search for and view your messages in the archive directly from Microsoft Outlook.

Refining an Outlook Search.

Before you install the Archive Add-in, review the system requirements and known incompatibilities.

Archive Add-in uses Message Text searches

Unlike the Control Console, the add-in only supports Message Text searches which you can further refine by selecting “Phrase”, “Any Word”, and “All Words”. The add-in does not allow you to search by sender, recipient, or date range.

Outlook Search is limited to 200 results

While an Email Archiving search can return an unlimited number of messages in the Control Console, the Archive Add-in only displays the first 200 results. This means that your search may return many more results than are displayed. To improve your search results, and ensure you are seeing all of the messages you want, you should refine your search criteria.

Using the ‘Phrase’ search option to limit results

The Phrase search option creates a narrower search than the Any Word option.

Use the Phrase option to search for any string of characters that might be contained in the email message body. Because the Phrase search finds messages that contain only the exact string of words, fewer messages will be found than the same string of words with the Any Word option.

Working with Archive Search Results.

Emails that are returned in the Archive Search Results folder can be used, saved, and managed just like new messages. Once you load an archived message into Outlook, it is stored as a local copy. You can then forward, reply, print, edit, or delete the email just as you would any ordinary email message. Changes to the local copy (including deletion) do not affect the original message stored in Email Archiving.

Additionally, any normal email activities — sending, replying, or forwarding an archived message — will result in the message being journaled and archived as a new, unique instance.

NOTE: Moving messages from the Email Archiving folder to the Outlook inbox, will also cause Email Archiving to journal and archive the messages again (depending on how the journal mailbox is configured on the Exchange server).

Renaming the Archive Search Results Folder.

You can save search results in a unique folder by giving the existing search results folder a new name. When a new search is run, the Archive Add-in automatically creates a copy of the Archive Search Results folder. The messages in the unique folder and the messages in the default folder both remain in Outlook.

Search from Outlook.

You can run a search in Outlook using the Search Archive field and view the results in the Archive Search Results folder.

- You can only search your own email account when using the Archive Add-In.
- You cannot search by date.

NOTE: Users with higher level access, including Customer Administrators and Archive Compliance Officers, can only view their own email accounts in Outlook.

Task

1 Enter your search terms in the Search Archive field.

2 Select the search type from the drop-down list.

- Phrase
- Any Word
- All Words

3 Click **Search** or press **ENTER**.

The first time you search from Outlook during a new session, you will see a login dialog box.

4 Enter the email address and password you use to access the Control Console and click OK.

Emails that meet your criteria appear in the Archive Search Results folder.

Archive Add-in Options.

The Archive Add-in adds a search field and search results folder to the Outlook window.

Table 1: Archive Add-in Option definitions

Option	Definition
Search Archive field	Enter your search criteria to search for email messages in the archive. You can search the following parts of any email message: • Message Header • Subject line • Message body • Attachment name • Attachment body
Search type drop-down	Select a search type to define how the search results should match your search terms: • Phrase — matches the exact phrase. • Any Word — matches any one word. • All Words — matches all words in any order.
Search button	Click to run a search.
Archive Search Results folder	Displays search results. The number of messages appears next to the folder label. The messages found in a search remain in the folder until a new search is run.

Troubleshooting: Issues with the Archive Add-in.

Archive Add-in conflicts with proxy settings.

A conflict between the Archive Add-in and your proxy settings can generate an error in Microsoft Outlook: Error 407 — Proxy Authentication Required

To bypass authentication, update your proxy settings to include the Archive Add-in's target domains in the exception list:

- console.mxlogic.com
- portal.mxlogic.com