Email Archiving Outlook Add-In

USER GUIDE

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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.

The search functionality in Microsoft Outlook is not the same as the options found in Control Console. Spam Soap recommends the following strategies to help you get the best results from the add-in.

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.