

# HP Email Archiving software for Microsoft Exchange Version 2.2

## User Guide



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# About this guide

This guide provides information about using HP Email Archiving software for Microsoft Exchange, also known as HP EAs Exchange.

## Intended audience

This guide is intended for:

- HP EAs Exchange program users
- HP EAs Exchange system administrators

## Prerequisites

Prerequisites for using this product include:

- Knowledge of Microsoft Windows
- Knowledge of Outlook and/or Outlook Web Access
- Knowledge of Web browsers

## Related documentation

In addition to this guide, HP provides the following document for users:

*HP Integrated Archive Platform User Guide*

## Documentation conventions and symbols

Convention	Element
Blue text: <a href="#">Related documentation</a>	Cross-reference links and email addresses
Blue, underlined text: <a href="http://www.hp.com">http://www.hp.com</a>	Web site addresses
<b>Bold text</b>	<ul style="list-style-type: none"><li>• Keys that are pressed</li><li>• Text typed into a GUI element, such as a box</li><li>• GUI elements that are clicked or selected, such as menu and list items, buttons, tabs, and check boxes</li></ul>
<i>Italic text</i>	Text emphasis
Monospace text	<ul style="list-style-type: none"><li>• File and directory names</li><li>• System output</li><li>• Code</li><li>• Commands, their arguments, and argument values</li></ul>

Convention	Element
<i>Monospace, italic text</i>	<ul style="list-style-type: none"> <li>• Code variables</li> <li>• Command variables</li> </ul>
<b>Monospace, bold text</b>	Emphasized monospace text

 **WARNING!**

Indicates that failure to follow directions could result in bodily harm or death.

 **CAUTION:**

Indicates that failure to follow directions could result in damage to equipment or data.

 **IMPORTANT:**

Provides clarifying information or specific instructions.

 **NOTE:**

Provides additional information.

 **TIP:**

Provides helpful hints and shortcuts.

## Support

You can visit the HP Software Support web site at: <http://www.hp.com/go/hpssoftwaresupport>

HP Software Support Online provides an efficient way to access interactive technical support tools. As a valued support customer, you can benefit by using the support site to:

- Search for knowledge documents of interest
- Submit and track support cases and enhancement requests
- Download software patches
- Manage support contracts
- Look up HP support contacts
- Review information about available services
- Enter into discussions with other software customers
- Research and register for software training

Most of the support areas require that you register as an HP Passport user and sign in. Many also require a support contract.

To find more information about access levels, go to: [http://support.openview.hp.com/new\\_access\\_levels.jsp](http://support.openview.hp.com/new_access_levels.jsp)

## Subscription service

HP strongly recommends that customers register online using the Subscriber's choice Web site: <http://www.hp.com/go/e-updates>.

Subscribing to this service provides you with email updates on the latest product enhancements, newest driver versions, and firmware documentation updates as well as instant access to numerous other product resources.

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# 1 Overview

This chapter introduces the HP Integrated Archive Platform (IAP) and the HP Email Archiving software for Microsoft Exchange (HP EAs Exchange).

- [IAP and HP EAs Exchange](#), page 7
- [Understanding document archiving](#), page 7
- [Understanding searching and document indexing](#), page 8

## IAP and HP EAs Exchange

IAP is a fault-tolerant, secure system of hardware and software that archives email messages and attachments for your organization, and lets you search for archived messages. It includes:

- Automatic, active email archiving
- Interactive querying to search for and retrieve archived messages according to various criteria

HP EAs Exchange is management software that can be used with the IAP. To interact with the system, your company may provide access to the programs shown in this table.

Application	What you can do
HP EAs Exchange Outlook Plug-In (customer option)	When the Outlook Plug-In is installed, you can view and open archived messages using Outlook. If the Archive Cache feature is configured, you can use the cache to access archived messages offline. You can also export messages from the IAP to an Outlook PST (Personal Folder) file.
OWA Extension	When OWA Extension is installed, you can view and open archived messages using Outlook Web Access in your Web browser.

In addition to the EAs Exchange software, HP provides an IAP Web Interface that lets you use your Web browser to search for and view documents that are archived on the IAP system. This guide describes simple searches in the IAP Web Interface. For information on using the Web Interface advanced functions, see the *HP Integrated Archive Platform User Guide*.

The IAP Web Interface is available to all users. The EAs Exchange Outlook Plug-In and OWA Extension are independent customer options. Depending on the configuration of your company's system, these options may or may not be available to you.

## Understanding document archiving

The IAP system archives email messages based on rules that are set up by your system administrator. For example, messages can be archived after they have been in your mailbox for a certain number of days, or they can be archived after your mailbox reaches a certain size. A special icon, called a stub or tombstone icon, appears in Outlook and OWA to show that a message has been archived.

Archiving involves physically storing copies of email messages and attachments, but also virtually storing messages in one or more virtual document collections, known as *repositories*. Your individual repository includes archived copies of the messages you send and receive.

Some users have access to repositories besides their own. For example, your manager or supervisor might have access to your repository.

## Understanding searching and document indexing

You can search for and retrieve any messages and attachments that are archived in your repository (or other repositories to which you have been granted access). However, you can search the contents of a document only if the contents have been indexed. Indexing a document's contents involves cataloging the document words to prepare them for later searching. When you search for a message or attachment, your query is checked against an index of words that is updated each time a message is archived.

Separators (such as punctuation) between words are ignored during indexing. Invisible source-code words, such as HTML markup tags, are also ignored in indexing.

Formatting usually has no bearing on indexing, and only the words you see in your email or attachment are indexing candidates. However, when a dropped cap (a large initial capital letter) is used in a Microsoft Word document, the word with the dropped cap is indexed as two separate words. This is because Word puts a dropped cap into a text box to set it off from the surrounding paragraph. In the example below, XYZcorp would be indexed as "X" and "yzcorp."

**X**YZcorp has posted strong results in the second quarter. Chief Executive Officer Bob Brown announced today that the company is on track to beat

Non-indexed files (for example, graphics or music files) can be searched only by using external identifying information, such as the file name or file extension.

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### NOTE:

There can be a delay from the time messages are archived to the time they are indexed. Messages archived very recently might not be immediately available for search.

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## Indexed document types

In addition to email messages, the following message attachments are indexed:

- Plain text files
- Rich text files (.rtf)
- HTML (HyperText Markup Language) files
- Files used by the following Microsoft Office programs: Word, Excel, and PowerPoint
- PDF (Portable Document Format) files viewed with Adobe Acrobat Reader
- Zip files
  - For zip files and embedded messages, the content inside the files is expanded and indexed.
- Embedded messages (RFC 822 messages)



- Files used by the following Corel WordPerfect Office programs: WordPerfect, Quattro Pro, Presentations. IAP supports indexing of these file types for WordPerfect Office X3 and prior releases of WordPerfect Office.

The following types of attachments are not indexed:

- Graphic files
- Music files
- Video files

These files can be archived, but can be searched only by using external identifying information, such as the file name or file extension.



## 2 Accessing archived email with Outlook and OWA

When the HP EAs Exchange Outlook Plug-In is installed on your computer, you can search for and view archived email messages in Microsoft Outlook.

You can also view archived messages in Outlook Web Access (OWA) if your company makes this option available. If you use OWA 2007 and later, OWA Premium is required to access archived email.

The following topics explain how to view and search for archived messages:

- [Viewing archived email messages](#), page 11
- [Searching for archived messages](#), page 12
- [Using Archive Cache](#), page 14

### Viewing archived messages

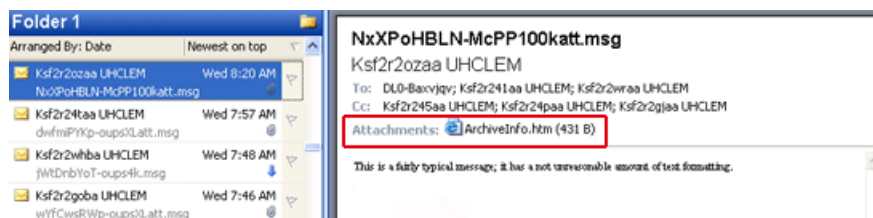
When your company installs HP EAs Exchange in combination with the IAP, email messages are archived automatically based on rules that are configured by your system administrator. For example, messages might be archived after a particular time period or after your mailbox reaches a certain size.

Email messages that have been archived are represented in Outlook with a special icon known as a Stub (or Tombstone) icon. In OWA, the icon appears when you open the message.

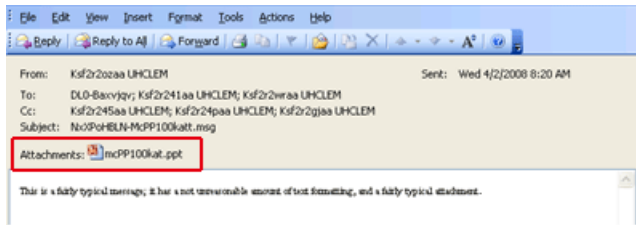


When you are connected to your company's network, you can open an archived message in your mailbox by double-clicking it. The message opens in its own window. You can also view the message from the preview pane.

When a file is attached to a message, the original attachment is not visible in the preview pane. Instead, a proxy attachment appears. In Outlook, the proxy attachment is named `ArchiveInfo.htm`. In OWA, it is named `Attachment Info.htm`.



Open the message to display the original attachment.



To save a message, open the message, select **File > Save As** and then select a location.

To save a message attachment, open the message, click the attachment file name, select **File > Save As** and then select a location.

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 **NOTE:**

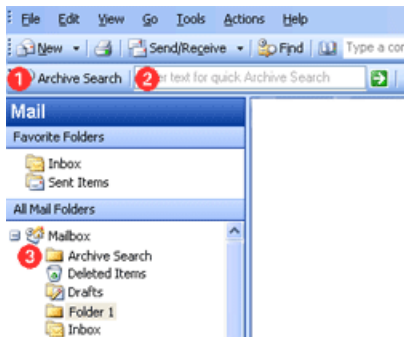
If you use OWA 2007 and later, archived calendar items such as appointments and meetings cannot be viewed in OWA. However, these items can be opened in Outlook or the IAP Web Interface.

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## Searching for archived messages

When you are connected to your company's network, you can search from your Outlook mailbox for archived email messages that are stored in the IAP.

There are three methods you can use:

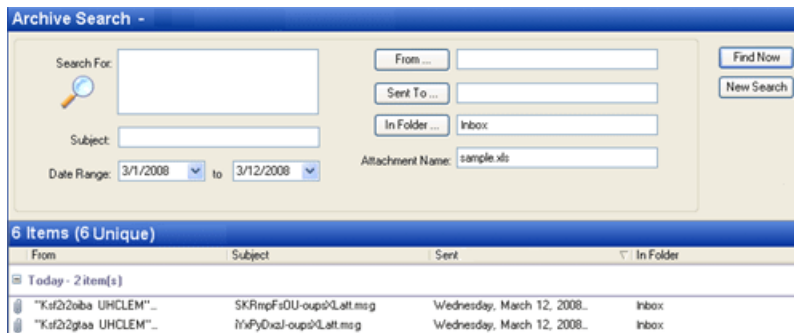


1. Click the **Archive Search** button in the **Archive Search** toolbar.
2. Enter search text in the **Archive Search** toolbar, then click the Quick Search arrow.
3. Click the **Archive Search** folder in the navigation pane.

To display the Archive Search toolbar, click **View > Toolbars > HP Archive Search**.

Depending on the way your company's environment is configured, you might need to log into the system when you perform a search. If so, enter your user name and password, and then click **Login**. (Ask your system administrator for the user name and password to use.)

All three search methods display the Archive Search window.



You can search for messages using any of the criteria below.

Query field	Description
Search For	Enter the text to search for in the message body or inside message attachments.
Subject	Enter the text to search for in the message subject.
Date Range	Click the arrows and select a date range for the search. Specifying a date range limits the search to the messages received within the date range.
From	Click <b>From</b> and select the sender. Specifying a sender limits the search to messages sent from the specified user.
Sent To	Click <b>Sent To</b> and select the message recipients. This includes recipients listed in the To, Cc, and Apparently-To message fields. Specifying one or more recipients limits the search to messages sent to the specified user(s).
In Folder	Click <b>In Folder</b> and select the folder where the message was located. You can select more than one folder. If there is a space in the folder name, add double quotation marks around the name. For example, "Folder 1" or "2nd Quarter." If you copy a message to another Outlook folder after it has been archived, the message entry in the IAP is updated to show the folder where it was copied. For example, if a message was archived while it was in Folder 1 and then moved to Folder 2, its IAP entry would show Folder 2. <b>NOTE:</b> Spaces in the name of an email folder are not indexed in Chinese, Japanese, and Korean. Searching for a folder name that contains spaces in these writing systems will fail, even if you surround the name in quotes.
Attachment Name	Enter the file name of a message attachment. (The contents of indexed document attachments are searched using the Search for field.)

Click **Find Now** to start the search. A list of the messages that are found is displayed in the lower part of the window.

 **NOTE:**

A message may appear more than once if it is found in more than one folder.

Open an archived message by selecting it in the list and double-clicking it.

To save a message, open the message, select **File > Save As** and then select a location.

To save a message attachment, open the message, click the attachment file name, select **File > Save As** and then select a location.

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 **NOTE:**

You cannot search for archived messages from OWA.

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## Using Archive Cache

If you frequently travel on business, you might want to request that your system administrator enable the Archive Cache feature of the Outlook Plug-In on your mobile computer.

Archive Cache runs in the background when Outlook is open. When your computer is online, it retrieves copies of archived messages from the IAP and stores them in a folder specified by the system administrator.






When your computer is offline, you can still access archived messages that have been stored locally. Simply select the message in Outlook and it appears just like any other message.

It is likely that the cache is limited by size and/or by time period. For example, you might be able to open cached messages in your mailbox only if they are less than six months old.

Archive Cache provides a status by displaying an icon in the system tray.



Hold your cursor over the icon to display status information. The following icons are used:

Icon	Description
	Default icon.
	Archive Cache is analyzing your mailbox for messages to download and/or downloading them.
	Archive Cache has completed downloading archived messages and is waiting for the next time it should scan for messages.
	Warning. Double-click the icon to display more information.
	Alert. Double-click the icon to display more information.

You can also display a status report or stop Archive Cache from caching archived messages.

To access the cache status window:

1. Double-click the EAsE Archive Cache icon in the system tray.

The status window displays information on the messages cached. Scroll to view the report.

2. To stop Archive Cache from processing, click **Stop**. To resume Archive Cache processing, close and then reopen Outlook.
3. To close the cache status window, click **Close**.





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## 3 Accessing archived email with the IAP Web Interface

The IAP Web Interface, which is accessed via your Web browser, can be used to display and send archived messages. Before logging in for the first time, ask your system administrator for the URL to use.

- [Logging in](#), page 17
- [Completing simple searches](#), page 17
- [Exporting search results](#), page 19

### Logging in

The IAP Web Interface can be accessed with any of the following supported Web browsers:

- Microsoft Internet Explorer for Windows 7.x and 8.x
- Firefox 3.0.11 and later

To open the IAP Web Interface:

1. In the Address field of your Web browser, enter the URL (Web address) that was provided by your system administrator.

The Web browser displays a login screen.

2. Enter your user name and password.

Ask your system administrator for the user name and password to use. In most cases, the user name will be your Windows user name or your email address. The password is usually your Windows password. Note that both the password is case-sensitive.

3. Click **Login**.

The Simple Search page is displayed.

4. To log out, click **LogOut** in the toolbar.

### Completing simple searches

The Simple Search page searches for email messages containing words you enter in the Search for field. In the Search for field, you can enter simple words, words with wildcards (\*), or a more sophisticated query involving Boolean expressions or word sequences.

To complete a simple search:

1. Click **New Search** in the toolbar.  
The Simple Search page is displayed.

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Content Type:  ?

Timeframe:  ?

Where to Search:  ?

Search for:

---

2. Search using the following fields on the Simple Search page:
  - **Content Type:** Email messages (email).
  - **Timeframe:** The time period to search, based on the date an email message was sent.
  - **Where to Search:** The repository to search. A repository is a virtual collection of documents (email messages and attachments). Only the repositories to which you have access are displayed. At a minimum, you have access to your own repository.
  - (Optional) **Search for:** Searches for words in the document or message body, but not in message fields such as From, To, or Subject. It also searches inside message attachments. Make your search text as specific as possible. In general, the more information provided in the Search for field, the narrower the search. If the field is blank (empty), all documents within the specified date range of the query are returned.



**NOTE:**

You can use wildcards (\* or ?) in this field, but do **not** use a wildcard for the first character in the field.

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3. When you have finished defining your query, click **Find Now** to start the search.








The Query Results page is displayed with the first 50 results. You can click the other bars to display additional sets of 50 results.

You are logged in as JoeUser

Query results complete  
Number of hits: 7 [ 1 - 7 ]

**More Options:**

Repository : JoeUser Repository

<input type="checkbox"/>	From:	Subject:	Folder:	Date:
<input type="checkbox"/>	 "wendtest013000@itchyexch.com" <wendtest013000@itchyexch.com>	Mail #13000 from E-Sender @bianca-sender1	\Inbox	03/18/2009 07:04:04
<input type="checkbox"/>	 "wendtest014000@itchyexch.com" <wendtest014000@itchyexch.com>	Mail #14000 from E-Sender @bianca-sender1	\Inbox	03/11/2009 03:57:24
<input type="checkbox"/>	 "wendtest014500@itchyexch.com" <wendtest014500@itchyexch.com>	Mail #14500 from E-Sender @bianca-sender1	\Inbox	03/07/2009 13:24:04
<input type="checkbox"/>	 "wendtest017000@itchyexch.com" <wendtest017000@itchyexch.com>	Mail #17000 from E-Sender @bianca-sender1	\Inbox	02/17/2009 17:37:24
<input type="checkbox"/>	 "wendtest019500@itchyexch.com" <wendtest019500@itchyexch.com>	Mail #19500 from E-Sender @bianca-sender1	\Inbox	01/30/2009 21:50:44
<input type="checkbox"/>	 "wendtest020000@itchyexch.com" <wendtest020000@itchyexch.com>	Mail #20000 from E-Sender @bianca-sender1	\Inbox	01/27/2009 08:17:24
<input type="checkbox"/>	 "wendtest023500@itchyexch.com" <wendtest023500@itchyexch.com>	Mail #23500 from E-Sender @bianca-sender1	\Inbox	01/02/2009 09:24:04

 **NOTE:**

When the results are retrieved, the most recent documents are displayed first.

Your search criteria is preserved until you create another query in the Web Interface session.

4. From the Query Results page, you can display the contents of an email by clicking the item in the list.

For more information about using the search features, including the Advanced Search feature, see the *HP Integrated Archive Platform User Guide*.

## Exporting search results

### Overview of the export process

Export is an advanced feature that is often used by a company's legal or compliance officers to export copies of archived messages from the IAP to an Outlook PST (Personal Folder) file. The original messages remain on the IAP.

Microsoft Outlook and the Outlook Plug-In must be installed for the export function to work. Messages cannot be exported to Outlook Web Access (OWA) mailboxes and exported messages cannot be viewed in OWA.

Additionally, messages can only be exported when Outlook and the plug-in are installed on the machine where the export is performed. For example, you cannot export messages from the IAP if you access Outlook remotely through a Citrix server session.

Messages can be exported to a single, default PST folder, or to a set of folders in the PST file.

When messages are exported to a set of folders:

- The following folders are created in the PST file: Inbox, Sent Items, Calendar, Tasks, Journal, Junk E-mail, Contacts, and Drafts.

- Messages are exported to folders with the same name as the folders where the messages were originally located. For example, if a message was located in the Inbox folder before it was archived, it is exported to the Inbox folder in the PST file.
- Messages archived from user-created folders are exported to folders of the same name in the PST file. For example, if you created an Outlook folder named Folder 1, messages that were located in Folder 1 before they were archived are exported to Folder 1 in the PST file.

**Note:** If you copy a message to another Outlook folder after it has been archived, the message is exported to the folder where it was copied. For example, if a message was archived while it was in Folder 1 and then moved to Folder 2, it would be exported to Folder 2.

- Messages archived from an Outlook Data File (such as an Archive Folder or other Personal Folder File) are exported to a structure that corresponds to the original data file.
- Archived calendar items such as appointments and meetings are exported to the Calendar folder in the PST file. Archived task lists are exported to the Tasks folder in the PST file.
- Messages archived without a folder name are exported to the default PST folder.

Deleting a message removes it from the PST file, but does not delete it from the IAP.

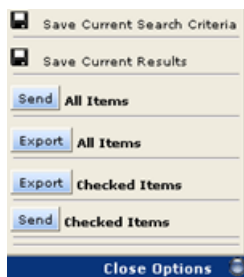
## Exporting messages

To export copies of archived messages:

1. Log into the IAP Web Interface and search for the relevant messages using the instructions in “[Completing simple searches](#)” on page 17.

If your search is a complicated one, use the Advanced Search instructions in the *HP Integrated Archive Platform User Guide*.

2. On the query results page, select the check box next to each item you want to export. Skip this step if you are exporting all items in the query results.
3. Click **More Options** to open the options menu.




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### NOTE:

If your result yields more than 500 messages, save the results before exporting. Otherwise only the first 500 messages are exported.

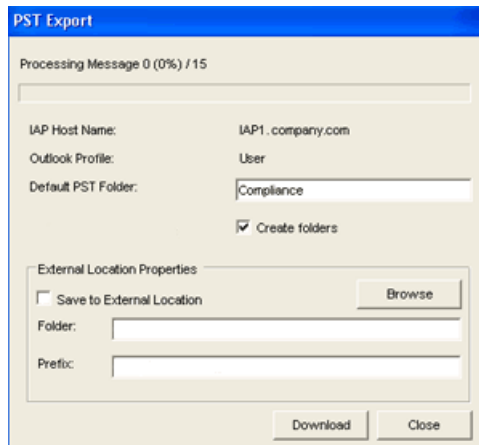
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4. To export all results, click **Export All Items**. To export selected items, click **Export Checked Items**. If this is the first time you are exporting messages, the File Download dialog box is displayed.

5. Click **Open** in the File Download dialog box.

(You might want to make sure that the file download box does not appear when you export messages from the IAP in the future. For example, you can clear the **Always ask before opening this type of file** check box if it is displayed in Internet Explorer.)

The PST Export window appears.



6. In the **Default PST Folder** box, enter a new name for the default folder.

The default folder name is `Default`. Any messages previously exported to the `Default` folder are deleted unless you change the folder name. A new PST folder is created automatically when a new name is specified in the Default PST Folder box.

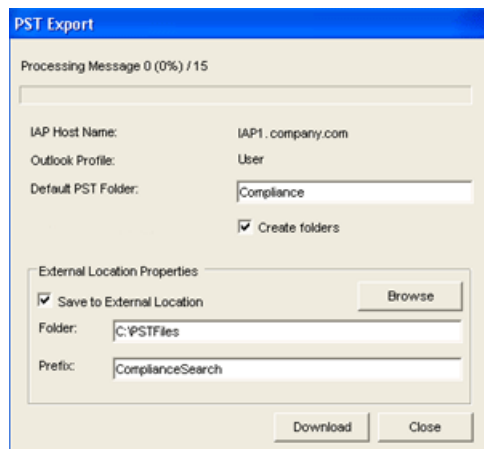
Messages are automatically exported to the default folder if the **Create folders** check box is not selected.

7. (Optional) Select the **Create folders** check box for messages to be exported to folders in the PST file.

The folders will have the same name as the folders where the messages were originally located. For more information on the folder option, see [“Overview of the export process”](#) on page 19. Note that any messages archived without a folder name are exported to the default PST folder.

8. (Optional) To export messages to an external location (such as a folder on your hard drive or network), follow steps a–c below.

If you do not specify an external location, messages are automatically exported to IAP Search Results (IAP Search Results.pst), which you can view in the Outlook Folders List. (See step 13.)



- a. Select the **Save to External Location** check box.
- b. In the **Folder** box, specify a location for the PST file. Enter a path manually or click **Browse** to select a location.

**Note:** If you add a folder that doesn't currently exist, a dialog box appears at the time the messages are downloaded. Click **Yes** to create the new folder.

- c. In the **Prefix** box, enter a name for the PST file to be generated when you export the messages.  
If the PST file contains more than 64,000 messages or the file size exceeds 1.7 GB, a new PST file is created. The PST files are numbered sequentially (for example, XYZ\_001.pst, XYZ\_002.pst, and so forth). If there is one file, it is numbered \_001 (for example, XYZ\_001.pst)

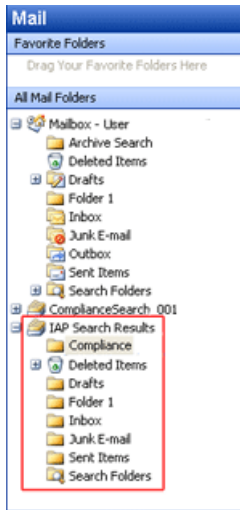
9. Click **Download** to begin the export process.

A progress bar is displayed while the results are downloading.

If you exported the messages to an external location, the Message Export Facility dialog box appears when the download is complete. Click **OK** to review the export log.

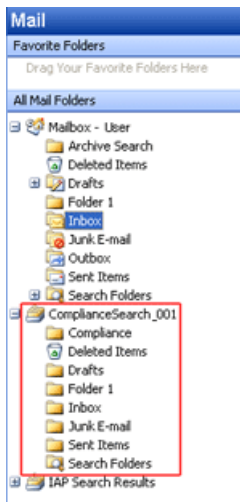
10. Click **Close** to close the PST Export window.
11. Click **Close Options** to close the options menu in the IAP Web Interface.

12. If the messages were not exported to an external location:
  - a. Open Outlook.
  - b. Expand **IAP Search Results** in the Folder List, then open the folders to view the messages.



13. If the messages were exported to an external location:
  - a. Open Outlook.
  - b. Select **File > Open > Outlook Data File**.
  - c. Browse to the location where you exported the PST file.
  - d. Select the PST file, and then click **OK**.

The folder containing the exported messages appears in the navigation pane Folder List.
  - e. Expand the PST folder, then open the subfolders to view the messages.



## Problems exporting messages

If the following error message appears when exporting messages from the IAP Web Interface:



Confirm that:

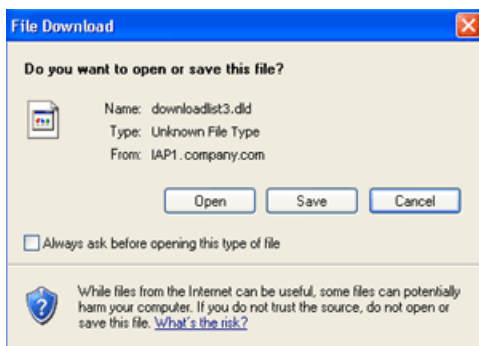
- You are not accessing Outlook through a remote application session, for example a Citrix server session.  
The export function does not work if you open the IAP Web Interface from a browser on the local computer, but Outlook and the plug-in are installed on a remote server.
- The Outlook Plug-In is installed on your computer.  
Outlook and the plug-in must be installed on your computer for the export function to work.

If Outlook and the plug-in are installed on your computer, verify that the Windows system has associated the .dld file type with HPBatchExport, which is used to export archived messages.

To verify the file type:

- (Windows Vista) In the Control Panel, select **Default Programs**, and then click **Associate a file type or protocol with a program** to view the file type list.
- (Other Windows operating systems) In the Control Panel, select **Tools > Folder Options**, and then click the **File Types** tab to view the file type list.

If the DLD file type is not shown in the file type list or is not associated with HPBatchExport, *Unknown File Type* appears in the dialog box when you export messages from the IAP.



## Creating a file type association

Create an association for the DLD file type if DLD is not shown in the file type list.

*Windows Vista:*

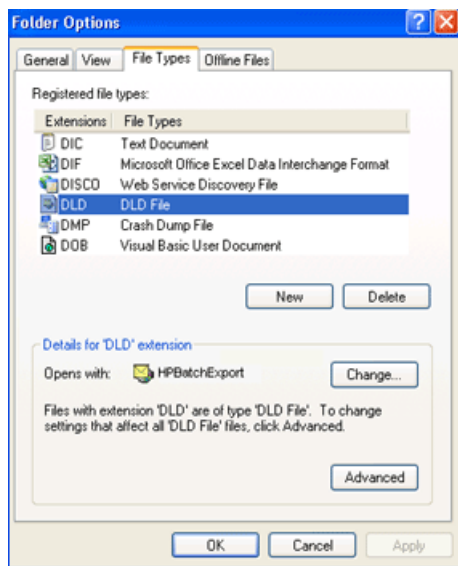
1. On the Query Results page, click **More Options** and export the search results.
2. When the file Save As dialog appears, save the DLD file to the Desktop.
3. Right-click the DLD file on the desktop, and select **Properties**.
4. In the **General** tab, click **Change**.
5. Click **Browse**, and then browse to the following location:  
`\Program Files\Hewlett-Packard\HP EASE Outlook Plug-In.`
6. Select **HPBatchExport.exe**, and then click **Open**.
7. Click **OK** to associate the DLD file type with HPBatchExport.



8. Continue exporting the file as described in [Exporting messages](#)

*Other Windows operating systems:*

1. In the Control Panel, select **Tools > Folder Options**, and then click the **File Types** tab.
2. Click **New**.
3. In the File Extension box, enter **DLD**, and then click **OK**.
4. In the Details for 'DLD' extension area, click **Change**.
5. Click **Select the program from a list** in the dialog box that appears, and then click **OK**.
6. Click **Browse** in the Open With dialog box.
7. Browse to the following location:  
`\Program Files\Hewlett-Packard\HP EAsE Outlook Plug-In.`
8. Select **HPBatchExport.exe**, and then click **Open**.
9. Click **OK** to associate the DLD file type with HPBatchExport.



## Changing the file type association

If DLD is listed as a file type, but is associated with another program, change the association:

*Windows Vista:*

1. In the Control Panel, select **Default Programs** and then click **Associate a file type or protocol with a program**.
2. Select the **.dld** extension, and then click **Change program**.
3. Click **Browse** in the Open With dialog box.
4. Browse to the following location:  
`\Program Files\Hewlett-Packard\HP EAsE Outlook Plug-In.`
5. Select **HPBatchExport.exe**, and then click **Open**.
6. Click **OK** to associate the DLD file type with HPBatchExport.

*Other Windows operating systems:*

1. In the Control Panel, select **Tools** > **Folder Options**, and then click the **File Types** tab.
2. Select the **DLD** extension in the File Types tab, and then click **Change**.
3. In the **Open With** dialog box, click **Browse**.
4. Browse to the following location:  
    \Program Files\Hewlett-Packard\HP EASE Outlook Plug-In.
5. Select **HPBatchExport.exe**, and then click **Open**.
6. Click **OK** to associate the DLD file type with HPBatchExport.

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