

# HP Enterprise Cloud Services Archive for E-Mail

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## Administration Guide

Document release date: February 2011  
Software release date: February 2011



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# About this document

This guide provides information about:

- HP Enterprise Cloud Services (ECS) Archive for E-Mail concepts, components, and steps to use the archive service and manage the system.
- HP ECS Archive for E-Mail Administration components.
- Configuration and administration of the HP ECS Archive for E-Mail system.

*In this chapter:*

- [Intended audience](#)
- [Prerequisites](#)
- [Related documentation](#)
- [Document conventions and symbols](#)
- [Documentation updates](#)
- [Subscription service](#)
- [Support](#)

## Intended audience

This guide is intended for customer administrators.

## Prerequisites

Prerequisites for using this product include:

- Knowledge of and familiarity with the operating systems of the computer systems to be used with this service
- Concepts and principles of email archiving
- Knowledge of Microsoft Exchange

## Related documentation

In addition to this guide, please refer to other documents for this product:

- *HP Enterprise Cloud Services Archive for E-Mail Getting Started Guide*
- *HP Enterprise Cloud Services Archive for E-Mail online help* accessible through links in the application

These and other HP documents can be found on the HP documents web site:

<http://www.hp.com/support/>

<http://support.openview.hp.com/selfsolve/manuals>

## Document conventions and symbols

Convention	Element
<code>&lt;parameter_name&gt;</code>	You must supply a value for a variable parameter.
Medium blue text	<ul style="list-style-type: none"> <li>• Cross-reference links</li> <li>• E-mail addresses</li> <li>• Web site addresses</li> </ul>
<b>Bold</b>	<ul style="list-style-type: none"> <li>• Key names or key sequence</li> <li>• GUI elements that are clicked or selected, such as menu and list items, buttons, and check boxes</li> <li>• Text typed into a GUI element, such as into a box</li> </ul>
<i>Italics</i>	<ul style="list-style-type: none"> <li>• Document titles</li> <li>• Text emphasis</li> <li>• You must supply a value for a variable in a GUI element.</li> </ul>
Monospace	<ul style="list-style-type: none"> <li>• File and directory names</li> <li>• Text displayed on the screen, such as system output and application messages</li> <li>• Command or reserved keyword in a CLI, API, program language, or operating system</li> <li>• Script or code example</li> </ul>
<i>Italic monospace</i> <code>&lt;parameter_name&gt;</code>	You must supply a value on the command line.
<b>Bold monospace</b>	<ul style="list-style-type: none"> <li>• Text typed at the command line</li> <li>• Emphasis of file and directory names, system output, and code</li> </ul>

△ **CAUTION** Indicates that failure to follow directions could result in damage to equipment or loss of data.

**NOTE** Provides additional information.

**TIP** Provides helpful hints and shortcuts.

**RECOMMENDATION** Provides guidance from HP for a best practice or for optimum performance.

## Documentation updates

The title page of this document contains the document release date. This date changes each time the document is updated.

To check for recent updates, or to verify that you are using the most recent edition of a document, go to:

[http://ovweb.external.hp.com/lpe/doc\\_serv/](http://ovweb.external.hp.com/lpe/doc_serv/)

<http://support.openview.hp.com/selfsolve/manuals>

You can also receive updated or new editions if you subscribe to the appropriate product support service. For details, contact your HP sales representative.

## Subscription service

HP strongly recommends that customers sign up online using the Subscriber's choice web site:

<http://www.hp.com/go/e-updates>

- Subscribing to this service provides you with e-mail updates on the latest product enhancements, service enhancements, and firmware documentation updates as well as instant access to numerous other product resources.
- After signing up, you can quickly locate your products under Product Category.

## Support

You can visit the HP Software Support web site at:

<http://www.hp.com/go/hpsoftwaresupport>

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
- 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://h20230.www2.hp.com/new\\_access\\_levels.jsp](http://h20230.www2.hp.com/new_access_levels.jsp)

For more information about HP Passport, go to:

<http://h20229.www2.hp.com/passport-registration.html>



*In this chapter:*

- [HP Enterprise Cloud Services \(ECS\) Archive for E-Mail Administration Guide](#)
- [HP ECS Archive for E-Mail distribution model](#)
- [Elastic computing or cloud computing](#)
- [Well-known US and international email journaling regulations](#)

## HP Enterprise Cloud Services (ECS) Archive for E-Mail Administration Guide

This *Administration Guide* explains concepts, identifies components, and describes steps to utilize and manage the archive service system.

This manual has the following objectives:

- To describe HP ECS Archive for E-Mail features and functionality
- To identify and define HP ECS Archive for E-Mail Administration components
- To describe HP ECS Archive for E-Mail configuration

This guide consists of the following chapters:

[Chapter 1, Introduction](#): Describes the HP ECS Archive for E-Mail as a Software as a Service (SaaS) solution.

[Chapter 2, New Account Set Up](#): Describes new Account setup and Account settings.

[Chapter 3, Administration Dashboard](#): Defines the Administration Dashboard and describes its attributes.

[Chapter 4, Administering User Access](#): Defines how the HP ECS Archive for E-Mail Administrator manages and views user account attributes.

[Chapter 5, Collectors](#): Defines the basic concept of Collectors and fully describes various collector methods and types, and proper configuration to retrieve email messages for archiving.

[Chapter 6, Policies and Settings](#): Describes methods and steps you can take to configure basic retention policy and system settings.

[Chapter 7, Reporting](#): Describes various report options about system, user, and collector activity.

[Chapter 8, Importing Data](#): Describes bulk import options.

[Chapter 9, Exporting Data](#): Describes bulk export options.

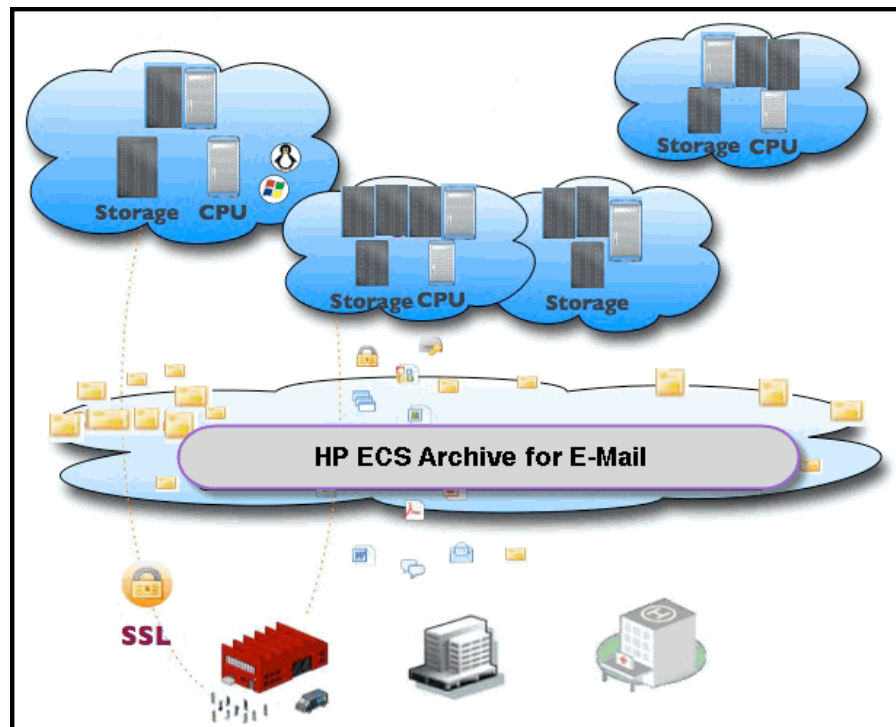
[Chapter 10, Searching](#): Defines and describes HP ECS Archive for E-Mail search features and capabilities.

## HP ECS Archive for E-Mail distribution model

HP's ECS Archive for E-Mail provides you with secure HTTPS access to utilize the system for e-compliance and offsite storage of email message data. HP ECS Archive for E-Mail offers a secure, web-based user interface for administrators to manage the system.

The distribution model is a Software as a Service (SaaS) solution. The idea of using software as a service emerged to enable the sharing of end-user licences in a way that reduced cost and also shifted server demands from the customer to the software provider.

**Figure 1** Archive Service distribution model



[Figure 1](#) illustrates the HP ECS Archive for E-Mail distribution model. This model enables HP to provide hosted application service(s) over the Internet to a licensed base of subscribers. The HP ECS Archive for E-Mail is provided on-demand and scales dynamically in an elastic computing environment.

## Elastic computing or cloud computing

The elastic computing environment is commonly known as cloud computing. Cloud computing refers to computing where software, services, and storage are provided to customers on-demand through the Internet. By leveraging cloud computing providers, HP is able to provide scalable solutions that grow according to the specific needs of our customers.

**Figure 2 Email archive elastic computing environment**

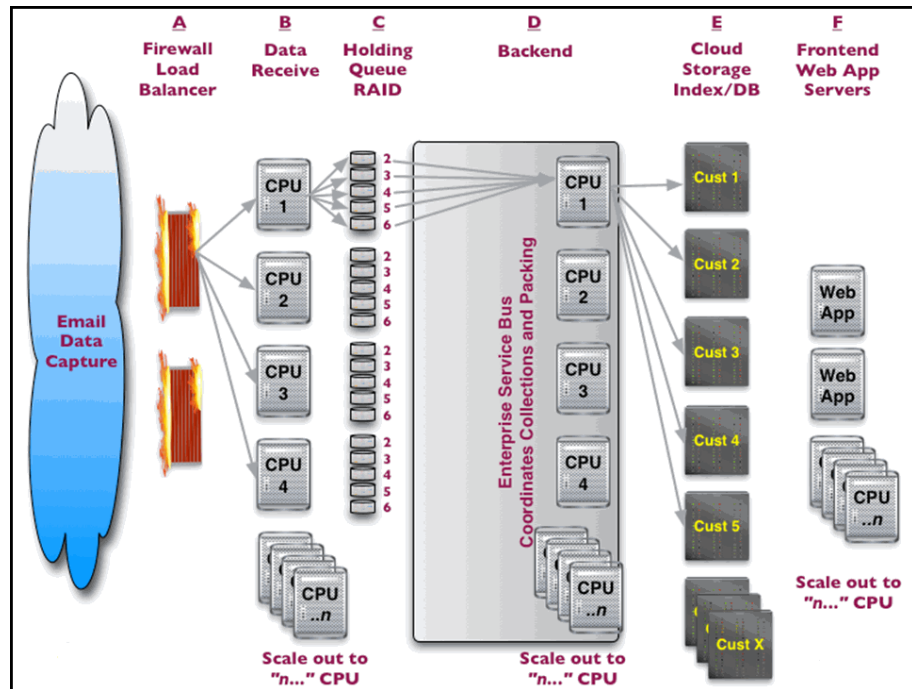


Figure 2 illustrates the HP ECS Archive for E-Mail elastic computing environment. This multi-tiered application exploits elastic cloud resources (web servers, storage indexes and databases, the Enterprise Service Bus, RAID arrays, and permanent data storage) to provide ubiquitous economies of scale. HP ECS Archive for E-Mail benefits are:

- Scalability
- Redundancy
- Automated provisioning
- Flexibility
- Low total cost of ownership (TCO)

The HP ECS Archive for E-Mail architecture features a multi-tenant backend and web-based front end.

Refer to HP's Cloud Computing Technologies website for more information on cloud computing:

<http://h71028.www7.hp.com/enterprise/us/en/technologies/cloud-computing-overview.html>

## Well-known US and international email journaling regulations

Several well-known U.S. and international regulations regarding journaling and email compliance influence organizational strategies and archive service configuration. These regulations delineate requirements to maintain readily accessible and complete archive of electronically stored information (ESI). This includes email message data, and social media and Instant Messaging (IM) activity as well. The archive service provides full-featured capabilities; including complete targeted search and retrieval of specific litigation or audit queries, complete text indexing and other advanced e-discovery capabilities. Governing authoritative organizations and enactments are listed below for your convenience:

### Sarbanes-Oxley Act of 2002 (SOX)

Publicly traded companies are required to retain email for up to five years, and make the data readily accessible for inquiries, audits and litigation.

<http://www.sec.gov/about/laws.shtml#sox2002>

### Security Exchange Commission Rule 17a-4 (SEC Rule 17 A-4)

Numerous regulations exist governing financial services industry email archiving.

<http://www.sec.gov/rules/interp/34-47806.htm>

<http://www.sec.gov/rules/final/34-44992a.htm>

### Financial Industry Regulatory Authority (FINRA)

Previously known as National Association of Securities Dealers (NASD)

<http://www.finra.org/Industry/Regulation/Guidance/InterpretiveLetters/P002692>

### Gramm-Leach-Bliley (GLB) Act (Financial Modernization Act)

<http://www.ftc.gov/privacy/privacyinitiatives/glbact.html>

### Financial Institution Privacy Protection Act of 2003

<http://thomas.loc.gov/cgi-bin/query/z?c108:S.1458.IS:>

### Health Insurance Portability and Accountability Act of 1996 (HIPAA)

<http://www.dhhs.gov/ocr/privacy/hipaa/administrative/statute/hipaastatutepdf.pdf>

### Uniting and Strengthening America by Providing Appropriate Tools Required to Intercept and Obstruct Terrorism Act of 2001 (Patriot Act)

<http://www.justice.gov/archive/ll/highlights.htm>

European Union Data Protection Directive (EUDPD)

[http://ec.europa.eu/justice\\_home/fsj/privacy/index\\_en.htm](http://ec.europa.eu/justice_home/fsj/privacy/index_en.htm)





## 2

# New Account Set Up

*In this chapter:*

- [HP tasks—creating your new account and Account Owner Administrator](#)
- [First email notification of login credentials and URL](#)
- [Customer tasks—Logging in and configuring the account](#)
- [Modifying account settings](#)
- [Billing information \(read-only\)](#)

When your company is ready to set up your new account, HP will initiate the process by creating a general account as well as the first account user, known as the Account Owner Administrator. Upon completion, the archive system will send you login credentials as well as your login URL.

Then you will follow the series of steps described in this chapter to complete your account set up process.

This chapter, [New Account Set Up](#), covers those aspects of getting started having to do with account configuration. Refer also to [Chapter 4, Administering User Access](#) and [Chapter 5, Collectors](#) for other essential set up tasks.

## Phone training available by request

HP provides documentation and videos to help email administrators set up this archive service quickly and easily. However, should questions arise, you are welcome to request a 90-minute phone training session from HP. During the phone call, you will get a brief overview of each tab of the administration module, as well as troubleshooting support required to get the collectors running properly.

## HP tasks—creating your new account and Account Owner Administrator

HP pre-sales and support staff will work with you to gather the information needed to create your customer account and the first account user, known as the Account Owner Administrator.

## Information required by HP to create your new account and Account Owner Administrator

To complete the new account sign up process, HP will gather the following information:

1. Account Owner Administrator information
  - User name
  - Password
  - First and last name
  - Email
  - Phone number
2. Account site and name information
  - Site name
  - Display name
  - Account type
  - Number of users
  - Address
3. Email systems in use
  - Exchange
  - Hosted Exchange

## First email notification of login credentials and URL

As soon as HP completes the process of creating your new account and the Account Owner Administrator user role, the archive system sends a notification to the Account Owner Administrator's email address.

## Example of initial email notification

Here is an example of the initial email notification sent from the archive system to the Account Owner Administrator:

Dear xxxxxxxxxx,

Welcome to HP Enterprise Cloud Service Archive for E-Mail. Our goal is to make sure that "getting started" is simple and fast. You are a few simple steps away from getting your own e-mail archive in place. This message provides important information to initiate your service and how to contact HP Software Support.

Support Case xxxxxxxxxx has been created to assist you with the HP Enterprise Cloud Service Archive for E-Mail account setup process. HP strongly recommends that your IT staff take advantage of this complimentary startup service, which will greatly shorten the time to deployment.

Your HP Enterprise Cloud Service Archive Service is ready to use. Below is your Customer URL for accessing the service and your Administrator Credentials:

Customer URL: <https://<instancename>.hpecsarchive.com>

Administrator Login:

Administrator Password:

The Administration and Getting Started Guides can be retrieved from the HP SaaS Customer Library:

Administration Guide {Link to Guide}

Getting Started Guide {Link to Guide}

Contacting HP Software Support

Within the next 10 days we will be sending an additional email which will provide you with your Service Agreement ID (SAID) number. This number is used when contacting HP Software Support to open Support Cases through Software Support Online (SSO) or over the phone. More information in regards to the SSO portal will be included in our next email communication.

If you have any questions please contact HP Software Support by calling one of the numbers provided below.

Sincerely,

The HP Enterprise Cloud Services Archive for E-Mail and HP Software Support teams.

U.S. Toll free: 877-837-8457, option 3

EMEA: +44 (0) 1344 366 540 option 3

Singapore: +1-800-322-8483, option 3  
Australia: +1-800-649-436, option 3  
Asia: +65-6544-9707, option 3  
India: +080 2504 1279 option 3

## Example of follow up email

Here is an example of the follow up email notification sent from HP to the Account Owner Administrator:

Dear xxxxxxxxxxxx,

We are pleased that you have chosen the HP Enterprise Cloud Service Archive for E-Mail.

Your Service Agreement ID (SAID) number is: xxxxxxxxxxxx

You will need your customer Service Agreement ID (SAID) which is required for HP Software Support.

This Number is used when contacting HP Software Support to open Support Cases through Software Support Online (SSO) or over the phone.

To get started, you will need to register for a HP Passport:

[www.support.openview.hp.com](http://www.support.openview.hp.com)

Additional information on how to register for a HP Passport and how to enable your Customer SAID to your HP Passport for Support are provided in the HP SSO Tutorial.

If you have any questions please contact our Service Operations Center with one of the numbers provided below.

Sincerely,

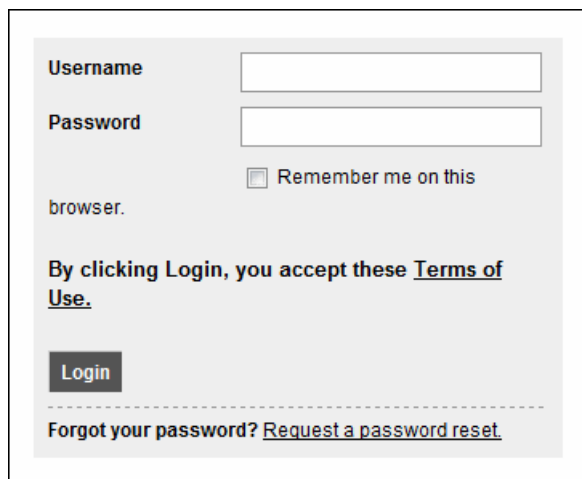
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Australia: +1-800-649-436, option 3  
Asia: +65-6544-9707, option 3  
India: +080 2504 1279 option 3

## Customer tasks—Logging in and configuring the account

Navigate to the login URL indicated in the initial email notification to access the login screen shown below in [Figure 3](#).

**Figure 3** Login screen



The login screen is a light gray rectangular box. It contains the following elements from top to bottom: a 'Username' label followed by a white text input field; a 'Password' label followed by a white text input field; a checkbox labeled 'Remember me on this browser.'; a line of text stating 'By clicking Login, you accept these [Terms of Use](#).'; a dark gray 'Login' button; and a link 'Forgot your password? [Request a password reset](#)'.

Enter the username and password specified by the initial email notification, then click **Login**.

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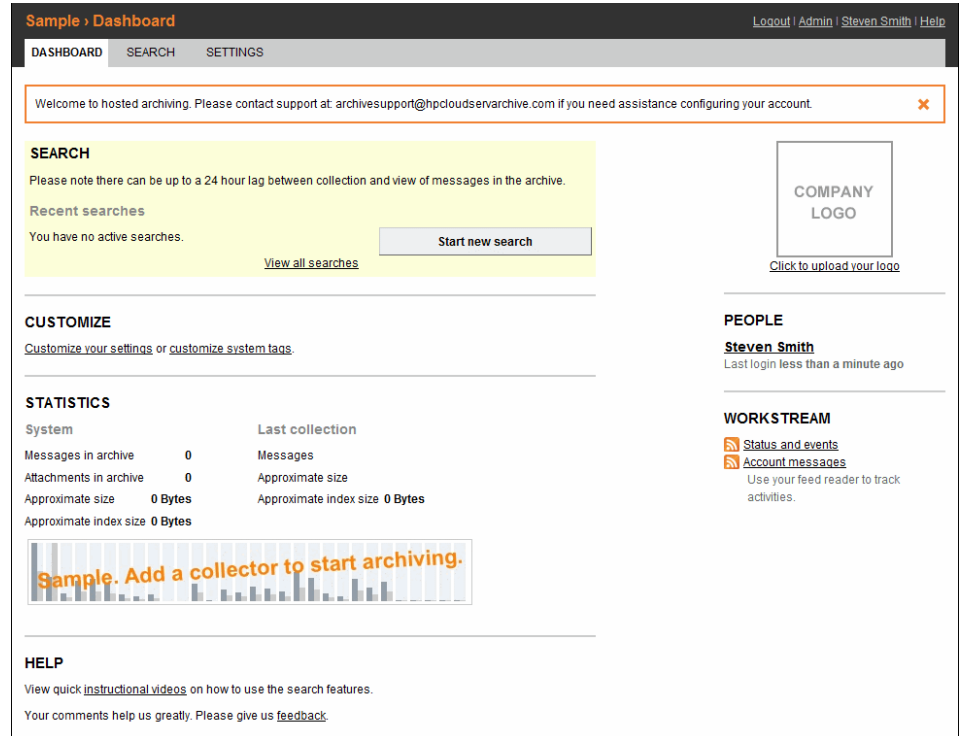
**NOTE** For security purposes, you will be required to change the Account Owner Administrator password the first time you log in.

---

### First-time login application landing page

The first time you log into the application, you will see the Dashboard page shown below in [Figure 4](#).

**Figure 4** Initial screen after logging in for the first time



## About the Account Owner Administrator role

At this stage of the process, you have access to the Account Owner Administrator role. Only one Account Owner Administrator exists system-wide and is the only user who may view and modify account information. The Account Owner Administrator can be reassigned, and it cannot be deleted.

**NOTE** To reassign the Account Owner Administrator role, there must be at least one other user with Account Administrator permissions in the system. From the Account tab, select a user from the **Account owner** drop-down list. Only those users with Account Administrator permissions will display in the drop-down list.

The essential job of the Account Owner Administrator is to take responsibility for the account level settings and configurations, as well as to create other system users as needed with their respective user permissions. See [Chapter 4, Administering User Access](#), for more information about user roles and permissions.

## Modifying account settings

After logging in as Account Owner Administrator, click the **Admin** link to navigate to the Administration Dashboard. Select the **Account** tab. (Note that only the Account Owner Administrator has access to the **Account** tab. No other users will be able to see it.)

The Account Setup **Account Owner** field displays the initial Account Owner Administrator information entered by HP during the setup process for your archive service. The Account Owner Administrator can modify this information if desired. You can select the **Account owner** field drop-down box to reassign the Account Owner to another user with administrator permissions after additional user administrator account(s) are created. (See [Chapter 4, Administering User Access](#) for information on user configuration.) Click **Update account** to apply your edits.

The Account Setup **Site Name** field displays the initial site name entered by HP during the setup process for your archive service. The **Site Name** field can be modified by entering a new value. If you modify the **Site Name** field and click **Update account**, the archive system applies the change and immediately disconnects all active sessions. This action requires users to log in again and establish a new SSL session to the newly created HTTPS URL. Furthermore, inform all your end users of the new Account Site URL if end user access is enabled. End users may want to update their bookmarks.

The **Email system in use** options allow selection of email systems for archival during the New Account Sign Up process. It is possible to modify this configuration by selecting or deselecting the available options.

If for some reason HP has not already enabled the service on the backend, the following error message appears:

```
The connection was refused by a firewall or the server.  
Please check IP/DNS, port and firewall rules and try  
again.
```

Verify that your security settings are correct and contact HP to ensure that you have identified email systems in use to be archived and that they are enabled on the backend by HP.

Click **Update account** to apply any edits to the Account attributes.

## Set the time zone for the archive system

The next account configuration task is to assign your **Time zone** stipulated in Greenwich Mean Time (GMT). From the **Settings** tab, select the appropriate time zone from the **Time zone** drop-down list, then click **Update**.

# Configuring account Subscription, Options, and Logo

**Figure 5    Account Subscription, Options, and Logo**

**SUBSCRIPTION**

Status and Payments

Status

Trial

Customer since

Renewal date

Payment status

Trial (Payment history)

Organization type

Non-Profit

Organization users

10

Extras

Historical collection

No

Data migration

No

Global RAID - Multiple copies

No

End user access enabled

Yes

**OPTIONS**

☒ Enable IMAP/Exchange integration

☒ Enable SMTP integration

☒ Enable end user access to the archive

☒ Enable Outlook Client Integration

Password expires in

180

Days

Intrusion lock

on 5 bad passwords

Account locked for

30 minutes

**USE YOUR OWN LOGO**

Logo file

Browse...

Your logo will appear on the dashboard and login screen.  
Logo must be less than 200 pixels wide and PNG or JPEG format.

COMPANY  
LOGO

The Account Subscription, Options, and Logo page is displayed in [Figure 5](#). Account Subscription displays customer account subscription attributes. Account Status and Payment, Extras, and Options attributes are maintained by HP based on your subscription terms. Contact HP to modify service if desired.

## Subscription Status and Payments

**Status:** The archive service displays customer account status if entered by HP through the backend; field options are Trial, Expired Trial, Paid Customer, and Demo.

**Customer since:** The archive service displays day/month/year date when a customer subscribes if entered by HP through the backend.

**Renewal date:** The archive service displays day/month/year date when customer renews their subscription if entered by HP through the backend.

**Payment Status:** The archive service displays customer account payment status if entered by HP through the backend; field value options are: Expired Trial, Past due, Invoice sent, Paid in full, Trial, Demo.



**Organization type:** Available selections are Commercial, Non-Profit, Education, and Government. This data point is for informational purposes only.

**Organization users:** Enter the number of organizational user mailboxes archived. The number of user mailboxes archived should match the number of licenses purchased. This field is used for report billing to indicate the upper limit you wish to set on your usage. The number you enter for this field should reflect the capacity that you intend to use. It is currently reported but not enforced.

## Subscription extras

**Historical collection:** The archive service has been enabled for the collection of historical email from your GroupWise environment. The system will allow historical collection of emails from your active post offices.

**Data migration:** The service is enabled to import legacy email from a mail system or from a previous archive service. Contact HP for more details.

**End user access enabled:** The archive service displays 'end user access enabled' as Yes or No, as set by HP through the backend. Yes means end users may access their personal archive through My Archive. If no, end users may not access My Archive.

## Options

Select applicable check boxes to enable the archive service to integrate with third party email server software, client software, and compliance capabilities, or provide end users with HTTPS access. Options are:

**Enable IMAP/Exchange integration:** Select this checkbox to enable IMAP integration with your Microsoft Exchange server.

**Enable SMTP integration:** Select this checkbox to enable SMTP integration with your Microsoft Exchange server.

**Enable end user access to the archive:** Select this checkbox to enable end users to connect to the archive service.

**Enable Outlook Client integration:** Select this checkbox to enable integration with Microsoft Outlook Clients.

**Password expiration:** Enter the number of days after which passwords expire.

**Intrusion lock:** Stipulate the number of failed login attempts that triggers an account lock out. Available selections are:

- Off (disabled)
- 3
- 5 (default)
- 7
- 10

**Account locked for:** Stipulate the amount of time that a user account will be locked if intrusion checks fail:

- Indefinite (admin must enable)
- 15 minutes
- 30 minutes
- 60 minutes

Any user role can potentially get locked out. If an Account Owner Administrator becomes locked out, they can: 1) Log in after the configured account lock period has expired; 2) Request a password reset from the initial login page; 3) Unlock the Account Owner Administrator by going to the Users tab and selecting the edit link next to the locked out user.

### Using your company's logo

You can upload your company's logo by clicking the **Choose File** button. The logo must be either PNG or JPEG format and be 200 pixels wide or less. The company logo displays on the initial HTTPS URL at logon, on the Administration Account UI, and on the Administration, Search, and My Archive Dashboards.

## Billing information (read-only)

The read-only billing information form shown in [Figure 6](#) is collected and entered into the archive service by HP for your reference only.

**Figure 6 Account Setup Billing Information**

**BILLING INFORMATION**  
**Your Name**  
First name   
Last name   
Organization   
**Address**  
Address Line 1   
Address Line 2   
Country   
City/Province   
Zip/Postal Code   
State   
**Contact information**  
Email   
Retype Email   
Phone   
Fax   
Other   
**Payment**  
Payment method



*In this chapter:*

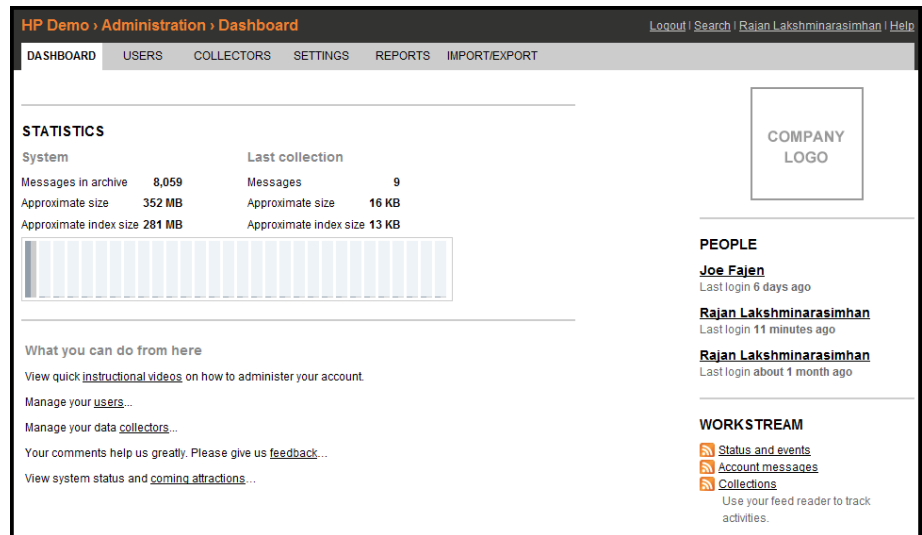
- [Administration Dashboard statistics](#)
- [Company Logo, People, Workstream](#)
- [What you can do from here](#)

In this chapter you will learn how to use the Administration Dashboard. The objectives are to identify and define the following Dashboard attributes:

- Statistics
- Logo
- People
- Workstream

The Administration Dashboard is based on the software industry standard in which a dashboard displays key business information that can be viewed at a glance.

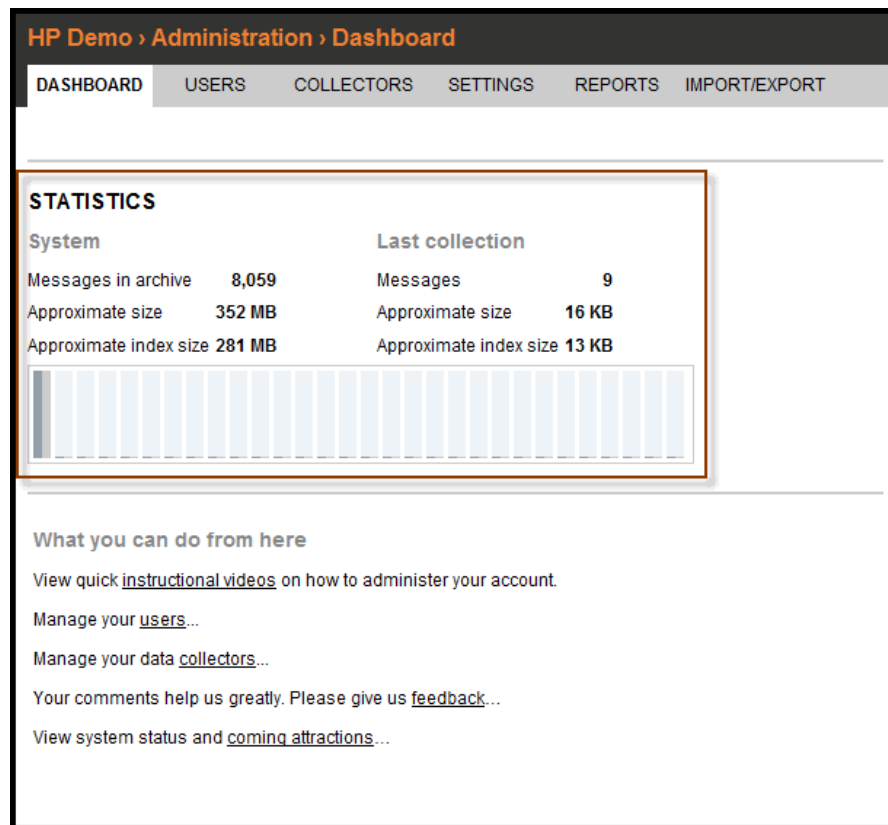
**Figure 7    Archive Service Administration Dashboard**



The HP ECS Archive for E-Mail Administration Dashboard (see [Figure 7](#)) facilitates the ability to view and quickly access summary Statistics, most recent People login(s), handy 'What you can do from here' hyperlinks, and workflow RSS feeds.

# Administration Dashboard statistics

**Figure 8 Administration Dashboard Statistics**



Dashboard Statistics (see [Figure 8](#)) display summary metrics for all email archival activity, providing a snapshot of the latest historical system data points, including:

System-wide data points:

- Message in archive - the total number of archived messages
- Approximate size - MBs of message data stored
- Approximate index size - MBs of indexed metadata generated

The statistics also provide a snapshot of Last collection data points, including:

- Messages - the number of messages archived at last collection
- Approximate size - MBs/KBs of message data archived at last collection
- Approximate index size - MBs/KBs of index metadata generated at last collection

**Figure 9 Administration Dashboard Company Logo, People, Workstream**

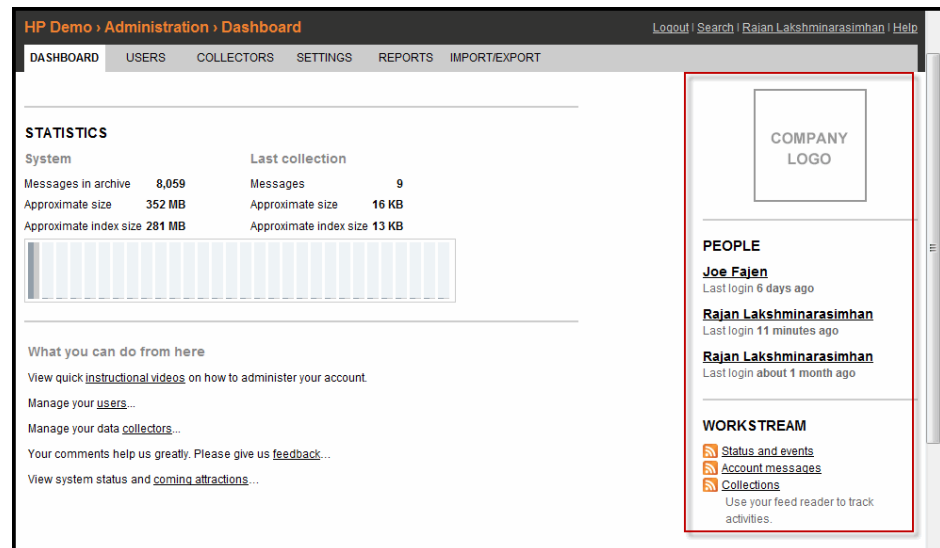


Figure 9 displays the following Administration Dashboard components:

COMPANY LOGO appears in the upper right-hand corner by default. To upload your logo, click the Company Logo square, browse to locate, then upload. Logo images may be PNG or JPG format and must be less than 200 pixels wide.

PEOPLE displays the first and last names of users who have logged in successfully and the duration since their last login. Click a user name to link to that user's account settings.

WORKSTREAM provides three convenient links to view an RSS feed of system activity or events, and one link posts messages from HP. Subscribe to the web page as a feed using RSS Live Bookmarks, Bloglines, My Yahoo, Google, or other applications.

- **Status and events** - displays account sign up, user account locks, bad password logon attempts, search access, collection events, search events, and more.
- **Account messages** - displays messages created by HP for you at your login screen or dashboard.
- **Collections** - collection ID date stamp, size, and link to Collection History page.

---

**NOTE** If you are viewing the Search Dashboard rather than the Administration Dashboard, you will not see the Collections link under WORKSTREAM. However, all three links will display if you are viewing the Administration Dashboard. This selection is made from the Settings > Your Settings > General > Default page drop-down menu.

---



**Figure 10** Selecting the Default page from the Settings drop-down menu

The screenshot shows the 'HP Demo > Administration > Settings' page. At the top, there are navigation tabs: DASHBOARD, USERS, COLLECTORS, SETTINGS (active), and REPORTS. Below these, there are links for 'Your Settings', 'End User Access Rules', and 'Login Messages'. The 'ACCOUNT' section contains fields for User name (accountadmin), First name (Rajan), Last name (Lakshminarasimhan), Password, Retype Password, Email (rajlaks@gmail.com), and Retype Email. The 'GENERAL' section includes 'Items per page' (10), 'Default page' (a dropdown menu with 'Search dashboard', 'Admin dashboard', 'Search dashboard', and 'Search list' options, where 'Admin dashboard' is highlighted), 'Time zone' (set to 'ne (US & Canada)'), and 'Default View' (Normal View). An 'Update' button is at the bottom left.

## What you can do from here

**Figure 11 Administration Dashboard: What you can do from here**

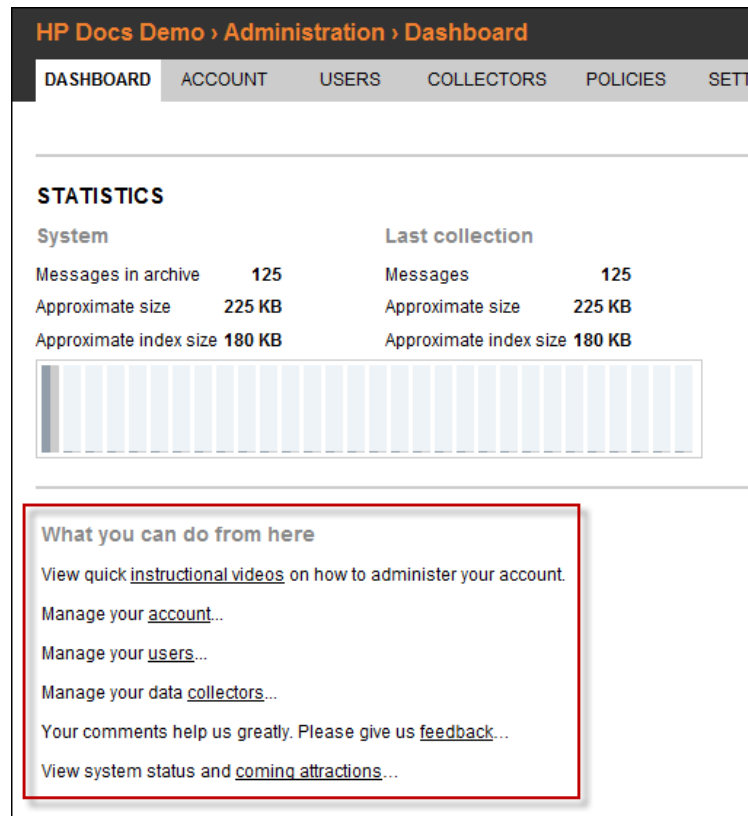


Figure 11 displays the 'What you can do from here' navigation pane that provides hyperlinks to the following:

- View quick instructional videos on how to administer your account
- Manage your account
- Manage your users
- Manage your data collectors
- Your comments help us greatly. Please give us feedback.
- View system status and coming attractions.

*In this chapter:*

- [Users tab](#)
- [Creating user accounts](#)
- [Enabling end user access to the archive](#)
- [Requesting a new temporary password](#)

In this chapter you will learn how to manage user access to your archive service. The objectives of this chapter are:

- Identify user attributes
- Define user permissions
- Describe creation and management of users

The Users tab provides administrators with the ability to create, manage, and view user account permissions and attributes.

## Users tab

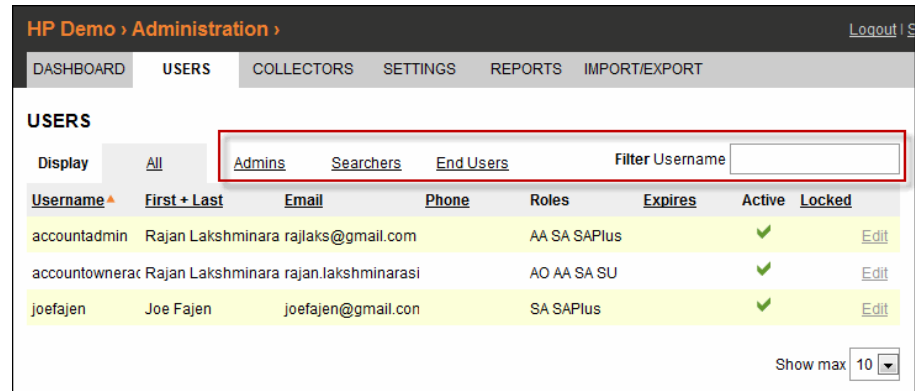
**Figure 12 Users tab**

Username	First + Last	Email	Phone	Roles	Expires	Active	Locked
accountadmin	Rajan Lakshminara	rajlaks@gmail.com		AA SA SAPIus		✓	<a href="#">Edit</a>
accountowner	Rajan Lakshminara	rajan.lakshminarasi		AO AA SA SU		✓	<a href="#">Edit</a>
joefajen	Joe Fajen	joefajen@gmail.com		SA SAPIus		✓	<a href="#">Edit</a>

Log in as Administrator. Select the Admin link, then the Users tab to display the Users page shown in [Figure 12](#).

## Filtering the users list display

**Figure 13 Filter Users List Display**



The screenshot shows the 'HP Demo Administration' interface. The 'USERS' tab is selected in the top navigation bar. Below the navigation bar, there's a 'USERS' section with a 'Display' dropdown set to 'All'. To the right of the dropdown are three links: 'Admins', 'Searchers', and 'End Users'. Further right is a 'Filter Username' text input field. Below these links is a table of users. The table has columns: Username, First + Last, Email, Phone, Roles, Expires, Active, and Locked. There are three rows of user data. At the bottom right of the table is a 'Show max' dropdown set to '10'.

Username	First + Last	Email	Phone	Roles	Expires	Active	Locked
accountadmin	Rajan Lakshminara	rajlaks@gmail.com		AA SA SAPIus		✓	Edit
accountownerat	Rajan Lakshminara	rajan.lakshminarasi		AO AA SA SU		✓	Edit
joefajen	Joe Fajen	joefajen@gmail.com		SA SAPIus		✓	Edit

You may filter the user list by account type by clicking All, Admins, Searchers, or End Users links, or enter user name in 'Filter Username' field, as shown in Figure 13.

- Administrator accounts may configure and audit the system, users, and collectors, view statistics, and create and export reports.
- Searchers are End User accounts that include at least one search capability. For example, if your archive service account chose the 'enable end user access to the archive' option, your end users have the low-level ability to search their own message archives. The Search Admin Plus accounts have more abilities; they can create, edit, run, and delete searches. They can also run reports.
- If you chose the 'enable end user access to the archive' option, End User accounts may access their personal message archive. There is no limit to the total number of users that can be created.

## Creating user accounts

The archive service features three methods to create End User accounts:

- [Method one: add users](#)
- [Method two: creating users in bulk](#)
- [Method three: new user self-registration](#)

Figure 14 Add Users

HP Demo > Administration > Users > Add

DASHBOARD USERS COLLECTORS SETTINGS REPORTS IMPORT/EXPORT

### NEW USER

Username

First and last name

Email

Retype Email

Temp. password

The user will need to change the password after they login.

### Additional email addresses

[Add email address](#)

### Permissions

☐ Account Admin (AA)

☐ Search Admin (SA)  
Search Admins can create new searches and manage search settings.

☐ Search Admin Plus (SAPLus)  
Enhanced Search Admin role that would allow to access the REPORTS.

☐ Search User (SU)  
Search Users can only access the searches created by Search Admins.

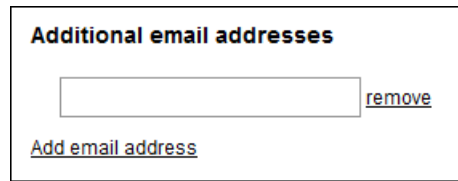
☐ End User (EU)  
End Users can only access the message archive.

## Method one: add users

Click **Add User** to display the New User page shown in [Figure 14](#).

- 1 **Username:** Type in the username label that the End User will use to log in. The Username must be unique to your archive service account.
- 2 **First and last name:** Type in user's first and last name.
- 3 **Email:** Type in user's email address. The primary email address must be unique to your archive service account.
- 4 **Email (confirm):** Type in user's primary email address again to confirm.
- 5 **Temp. password:** Type in a temporary password. By default, the password must be at least 8 alphanumeric characters with a minimum of three numbers. Upon first log in, the archive service will prompt the End User to stipulate a new password for their account.

**Figure 15 Additional email addresses**



The screenshot shows a rectangular box with a title bar at the top that reads "Additional email addresses". Inside the box, there is a text input field. To the right of the input field is a link labeled "remove". Below the input field is another link labeled "Add email address".

- 6 **Add email addresses:** Click the Add email address link to associate additional email addresses with this user's account, shown in [Figure 15](#). The archive service sends an email notification to the email address with a link to respond and verify new address. **Remove** link appears to remove an additional email address once entered.

End Users can also associate additional email addresses to their personal accounts via their SETTINGS.

Your archive service will compare email addresses entered against your policies and settings.

## Permissions

- 1 **Permissions:** Select checkbox to assign permission:
  - **Account Owner (AO)** As stated previously, the Account Owner Administrator (AO) is a singularly unique account administrator role created during NEW ACCOUNT SIGN UP. The archive service assigns maximum permissions to the Account Owner. An Account Owner may create, edit and delete user accounts, edit account attributes, and modify all system settings. There may be only one Account Owner system-wide. To reassign the Account Owner role, navigate to the Administration Account tab and toggle the Account Owner dropdown box to assign Account Owner status to another administrator.

---

**NOTE** Account Owner permission cannot be awarded to a new user while creating the user. The Account Owner can only be changed from the Administration Account tab once the user has already been created.

---

- **Account Administrator (AA)** Account Administrator permissions allow the ability administer your archive service system. Account Administrators may create and edit user accounts and system collectors, modify system settings, and execute reports.
- **Search Administrator (SA):** Search Administrators may create, manage and execute searches; assign user access to a given search, and export search results.
- **Search User (SU)** permissions allow 'access', 'change scope' and 'export' of existing searches as assigned by the Search Administrator to the Search User for a given search. It is a support role to the Search Administrator. Search User cannot create or delete a search.
- **Search Admin Plus (SAPlus)** permissions include Search User permissions plus ability to execute system Reports.

- **End User (EU)** permissions allow individuals to access their personal archived data.

## Additional contact information and account options

**Figure 16 Add New User - Additional Attributes**

### Additional contact information

Organization

Phone

Fax

### Account options

Expire Date

Set an expiration date to disable login access. The account will remain active, but no logins will be allowed after the expiration date.

☐ **Account disabled**  
Prohibits user from accessing their account.

**Intrusion Detection is Enabled**  
If there are more than 5 attempts to use the wrong password the account will automatically be disabled.

☐ **Account locked**  
Lock/Unlock user account.

☐ **Disable password recovery**  
Disables feature allowing user to reset their password on the login screen.

☒ **Disable Outlook Integration**  
Turn off Outlook client integration for this user.

Figure 16 displays additional, optional user account attributes as follows:

- 1 **Organization** field is a label of your choosing to qualify account, for example, EAST or WEST.
- 2 **Phone** field is for a phone number.
- 3 **Fax** field is for a fax number.
- 4 **Expire Date** field stipulates expiry value in the database for this account and archive service denies login access on or after that date. Click calendar applet to set date. Click Clear to clear date. You use this setting to provide temporary access to users, for example, a sales engineer that periodically reviews system configuration during first 60 days of subscription; or legal compliance consultant that creates executes and exports search results.
- 5 **Account disabled**, when checked, disables end user access to their account.
- 6 **Intrusion Detection** is enabled by default. The Account Owner sets an 'Intrusion Lock' value for your archive service on the Administration Account tab. Intrusion Lock values are none, 3, 5 (default), 7, and 10. Logon attempts that exceed 'Intrusion Lock' value lock the user's account and the archive service login page displays 'Your Account has been locked.'

- 7 **Account Locked** Account is locked when checked; account is not locked when unchecked. Deselect this checkbox to clear a user's locked account.
- 8 **Disable password recovery**, when checked, prevents a user from requesting a password reset from the logon screen through email.
- 9 **Disable Outlook Integration** uniquely disables Outlook integration for this user account even if enabled system-wide. For example, you may wish to deploy Outlook integration to a subset of users during an incremental rollout.

## Welcome message

Figure 17 Welcome message

The screenshot shows a web form titled "Welcome message". It contains two main text input areas: "Default message" and "Custom text". The "Default message" area is pre-filled with the following text: "Hello <name>," "Your user login to HP Docs Demo is ready." "Your user name is <username> and your temporary password is <password>." "For security purposes, please change your password the next time you login." Below the "Custom text" area, there is a small explanatory text: "A welcome message is sent on add or when a username/temporary password is set. The custom text will be sent in addition to the default message, separated from it by a blank line." At the bottom of the form, there are two buttons: "Add user and send welcome message" and "Do not send welcome message".

The last portion of the New User page is for a welcome message. The welcome message is optional. There is a configurable default message that comes pre-populated in the **Default message** text area.

Additionally, using the **Custom text** field, you can enter a message tailored for new users with any special message or communication that you want to provide to them.

To prevent the welcome message from being sent, select the checkbox for **Do not send welcome message**.

## Method two: creating users in bulk

Log in as Administrator, select Admin link, and Users tab to display archive service Users page shown in [Figure 12](#) and click **Bulk Create End Users**.



**Figure 18 Create Users in Bulk**

HP Demo > Administration > Users > Add in Bulk Logg

DASHBOARD USERS COLLECTORS SETTINGS REPORTS IMPORT/EXPORT

### CREATE USERS IN BULK

Create the CSV file with users information and then upload the file here. A sample format is below:

```
"username","first name","last name","email addresses","role1, role2" (optional: blank assumes EU)
jadam, John, Adams, jadams@acme.com, sa
tjefferson, Tim, Jefferson, tjefferson@acme.com
```

[Download CSV file template](#)

#### Welcome message

Default message

Hello <name>,  
Your user login to HP Demo is ready.  
Your user name is <username> and your temporary password is  
<password>.  
For security purposes, please change your password the next time  
you login.

Custom text

A welcome message is sent on add or when a username/temporary password is set.  
The custom text will be sent in addition to the default message, separated from it by a blank line.

☒ Process list and send welcome message ☐ Do not send welcome message

To generate multiple end user accounts in bulk, click the '**Download CSV file template**' shown in [Figure 18](#). Note the Create Users in Bulk UI displays a sample header format and two user entries. A flat, comma-delimited file to create users in bulk is a common, industry-standard tool. Enter each user's field values for your archive service. Instructions on how to fill out the template are included in the download, too

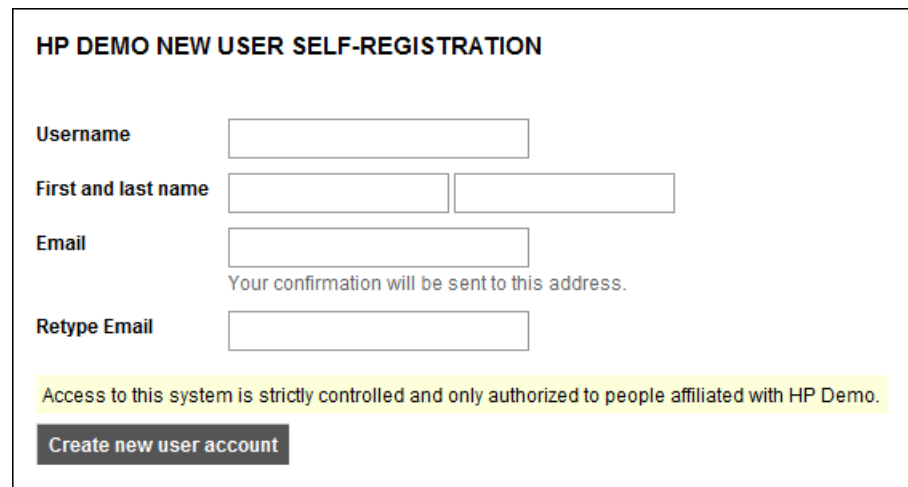
## Method three: new user self-registration

The archive service features three methods to create end user accounts. The first two, 'Add New User' and 'Create Users in Bulk' are previously described earlier in this chapter.

The third option to create new End User accounts it to allow users to self-register and gain access to their personal archive account.

For security purposes, configure your archive service Settings - End User Access Rules to explicitly allow only your corporate SMTP aliases to create end user accounts. See [Chapter 6, Policies and Settings](#) for more information.

**Figure 19 New User Self-Registration**



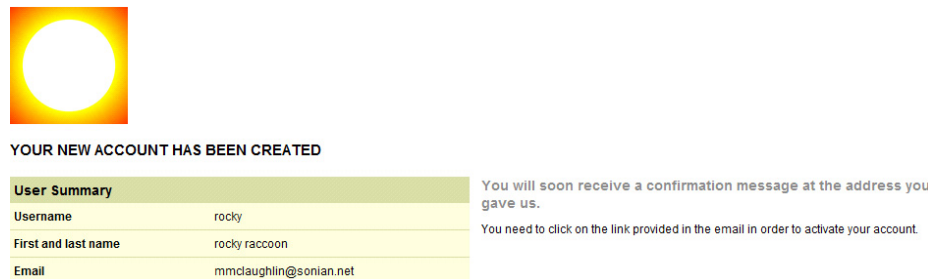
The form is titled "HP DEMO NEW USER SELF-REGISTRATION". It contains the following fields and elements:

- Username**: A single text input field.
- First and last name**: Two adjacent text input fields.
- Email**: A single text input field.
- Retype Email**: A single text input field.
- A confirmation message: "Your confirmation will be sent to this address." located between the Email and Retype Email fields.
- A yellow highlighted message: "Access to this system is strictly controlled and only authorized to people affiliated with HP Demo."
- A dark button labeled "Create new user account".

By default the archive service provides a self-registration HTTPS URL in the format of <https://<instancename>.hpecsarchive.com/user/signup/new>, see [Figure 19](#).

Users enter a Username, first and last name, email and email confirmation to self-register and click Create new user account. As previously described, username and email alias must be unique system-wide. If the end user enters a duplicate username or email address the archive service UI displays the appropriate error message.

**Figure 20 Your New Account Has Been Created**



The screen features a large yellow circle icon at the top. Below it, the heading "YOUR NEW ACCOUNT HAS BEEN CREATED" is displayed. A table provides a summary of the user's details, and two lines of text on the right provide instructions on how to activate the account.

User Summary	
Username	rocky
First and last name	rocky raccoon
Email	mmclaughlin@sonian.net

You will soon receive a confirmation message at the address you gave us.  
You need to click on the link provided in the email in order to activate your account.

After an end user self-registers successfully, the archive service immediately acknowledges account creation as shown in [Figure 20](#). Also, a confirmation email is sent to the stipulated email alias with an HTTPS URL enclosed. The End User must successfully navigate to the HTTPS URL to activate their newly registered account.

# Enabling end user access to the archive

If you are creating end user accounts one at a time or in bulk, ensure end user access to your archive service is enabled.

**Figure 21    Enable End User Access**

**SUBSCRIPTION**

Status and Payments

Status

Trial

Customer since

Renewal date

Payment status

Trial (Payment history)

Organization type

Commercial

Organization users

10

Extras

Historical collection

No

Data migration

No

Global RAID - Multiple copies

No

End user access enabled

Yes

OPTIONS

☒ Enable IMAP/Exchange integration

☒ Enable SMTP integration

☒ Enable end user access to the archive

☒ Enable Outlook Client Integration

Password expires in

180

Days

Intrusion lock

on 5 bad passwords

Account locked for

30 minutes

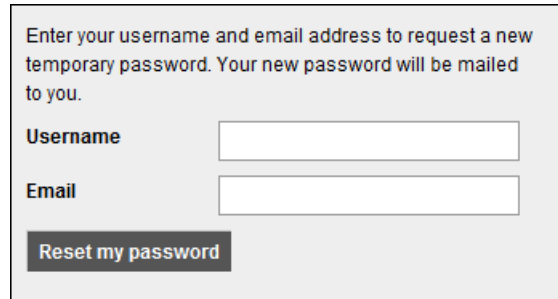
First, configure your archive service to enable end user access to your system. Log on as Account Owner Administrator and navigate to Administrator ACCOUNT OPTIONS page, displayed in [Figure 21](#). If you subscribed with HP for end user access 'End user access enabled' attribute displays Yes. If 'End user access enable' displays No, contact HP to add this feature.

Then, select your Account Options '**Enable end user access to the archive**' checkbox to permit end user access. It is disabled by default.

## Requesting a new temporary password

The archive service provides an HTTPS URL, in the format of <https://<instancename>.hpecsarchive.com/reset/new>, for administrators to offer to users who cannot remember their password.

**Figure 22 Request a new temporary password**

A web form with a light gray background and a thin black border. At the top, it contains the text: "Enter your username and email address to request a new temporary password. Your new password will be mailed to you." Below this text are two input fields. The first is labeled "Username" and the second is labeled "Email". Both labels are in a bold, sans-serif font. At the bottom of the form is a dark gray button with the text "Reset my password" in white, sans-serif font.

Users navigate to the Reset my password page, shown in [Figure 22](#), and enter their archive service username and email address. The archive service sends an email message with the user's existing password stating:

```
Hello <username>,  
  
The system administrator has updated your account. Your user  
name is <username>. Your new temporary password is  
<existing_password>. Please change your password on your next  
login. Your login location is https://  
subdomain.archiveserviceprovider.com>
```

Users follow instructions and navigate to their archive service default HTTPS URL and log in with their existing password and are immediately prompted to change their password.

*In this chapter:*

- [Non-mail items archived conditionally](#)
- [Draft and deleted items](#)
- [Microsoft Exchange envelope journaling](#)
- [Working with collectors](#)
- [Adding IMAP or Exchange Collector — Exchange Journal](#)
- [Adding SMTP collector and trusted network — Exchange SMTP](#)
- [SMTP and encryption as a best practice](#)
- [IMAP security with SSL as a best practice](#)

This chapter has the following objectives:

- To describe the basic concept of Collectors.
- To identify and define Collectors web-based User Interface attributes.
- To describe all Collector types and configuration options.

Collectors gather your data for archive storage. The basic concept of Collectors is to collect email messages and attachments from your Microsoft Exchange email systems for archiving.

To determine the steps necessary to setup your archive service collectors, consider these two questions:

- 1 Where is my email system located, customer premise equipment (CPE) or hosted?
- 2 What type of transport mechanism do I want to use to archive mail, IMAP or SMTP?

**Figure 23 Email Archive SaaS and Connectors Diagram**

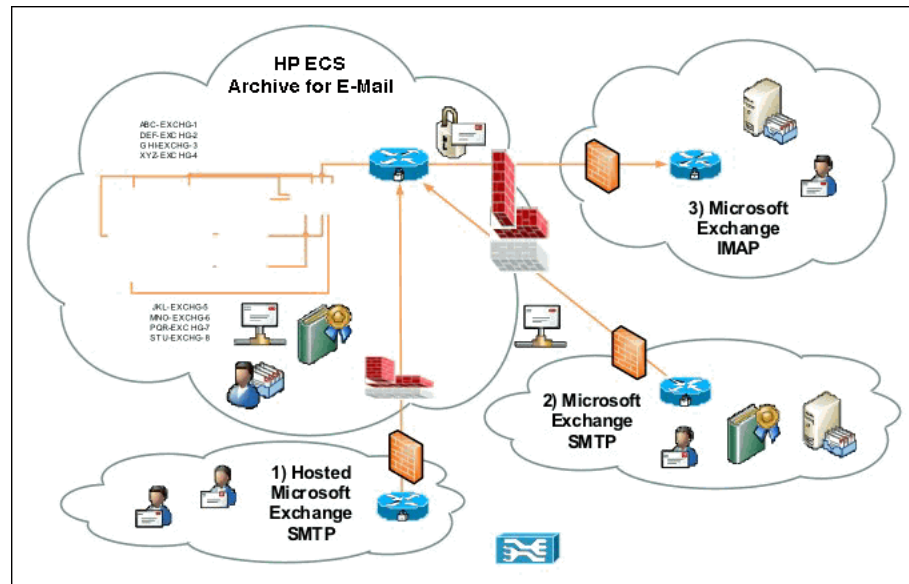


Figure 23 illustrates three scenarios that answer the two questions posed. It shows HP ECS Archive for E-Mail cloud with redundant, load balanced archive systems and connectors to the following mail systems:

- 1 SMTP hosted Microsoft Exchange Envelope Journaled mailbox
- 2 SMTP customer premise equipment (CPE) Microsoft Exchange Envelope Journaled mailbox
- 3 IMAP CPE Microsoft Exchange Envelope Journaled mailbox

**Figure 24 Concept of Collectors Push and Pull Methodologies**

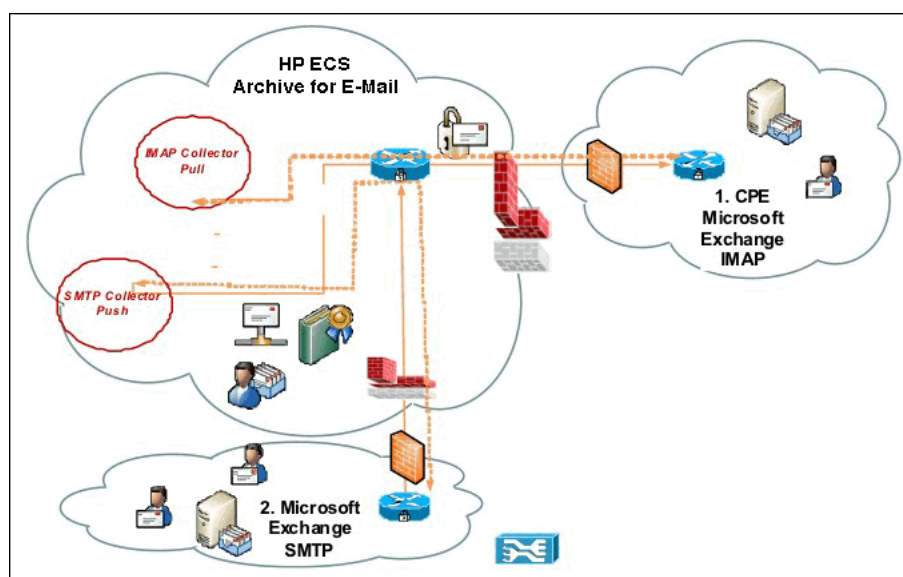


Figure 24 illustrates two collector methods possible for retrieving email, IMAP or pull, and SMTP or Push. The solid line shows the direction of the initial collector connection established to retrieve email messages and the dotted line shows the direction of the retrieval of archived messages by the customer from the archive cloud.

## Pull method

The archive service is configured with an Internet Message Access Protocol (IMAP) Collector that initiates a connection, at midnight GMT by default, to the source email server and pulls all messages from the configured folders to the archive system. The timing of the connection to the source email server can be changed by HP Support to meet your requirements. This pull method utilizes IMAP IETF standard specifications and is used by the archive service for all platform-specific collectors, except SMTP.

## Push method

The source email system is configured to push envelope journaled email messages to a unique Simple Mail Transfer Protocol (SMTP) address on the archive system. The time to initiate the connection is configured on the source email system. This push method utilizes SMTP IETF standards and is used by the archive service for all SMTP Collectors.

## Non-mail items archived conditionally

Non-mail items, such as tasks and calendar items, do not get collected if there is only a single person involved. When non-mail items are created, the archive service collector does not archive them if it is not between two or more people. Specifically, if a calendar item is relevant to only one person, it is not archived.

If non-mail items involve multiple parties, then they are archived.

## Draft and deleted items

Draft and deleted items are not explicitly collected even when you may have selected those options in the archive service. By default the journal mailbox is equipped with a Draft and Deleted Items folder. However, through normal administration of a journal mailbox, no journal items should be placed in the Draft and Deleted Items folder.

## IMAP protocol as it relates to draft and deleted items

Because of IMAP's protocol, if you delete an item in your Inbox by selecting it and pressing the Delete button, or by right-clicking it and selecting Delete, it is now in the Deleted Items folder and it is marked for deletion. Whereas if you drag an email from your Inbox into the Deleted Items folder, the email is not actually "marked" for deletion as far as IMAP is concerned.

If you drag a draft item from your Inbox into the Draft folder, the archive service would collect and archive that. A work in progress email that has not been sent is in a work in progress status and would not be collected.

Items with a deleted status that are in the Deleted Items folder, or items with a draft status will not be collected. By default, the archive service displays the folders for Calendar, Deleted Items, Inbox, Drafts, and Sent Items.

## CPE (customer premise equipment) Microsoft Exchange IMAP example

One organization's unique and secure virtual stack is configured with an IMAP Collector that collects mail to be archived from the Microsoft Exchange server located onsite at the organization.

## Microsoft Exchange SMTP example

A second organization's unique and secure virtual stack is configured with an SMTP Collector that collects mail to be archived from the organization's hosted SMTP server, co-located in the organization's HP ECS Archive for E-Mail cloud.



# Microsoft Exchange envelope journaling

Microsoft Exchange 2003/2007/2010 utilizes Envelope Journaling. The concept of Envelope Journaling is to provide a company or organization with a method to enforce policies to comply with regulations regarding email communication. A journaling agent monitors email traffic for a given information store mailbox and all email messages are copied to an envelope journaled mailbox. The envelope journaled mailbox is configured to connect to the archive service through SMTP for archiving and thereby captures and uploads all email communication for forensic analysis if required, or any search function, through HP ECS Archive for E-Mail.

Microsoft also offers an option called Microsoft Exchange Premium journaling. With Premium journaling, it is possible to perform more granular journaling with journal rules. This option allows an organization to configure journaling to capture individual recipients or members of distribution groups. Refer to Microsoft Exchange documentation for more information about this option.

Please refer to the selected links below from the Microsoft TechNet Exchange Server TechCenter for more information on how to configure Exchange Envelope Journaling and SMTP.

---

**NOTE** When SMTP journaling is used, the archive service does not maintain folder information for archived emails.

---

## Envelope Journaling and Microsoft Exchange 2003/2007

*How to Create a Custom SMTP Recipient for Exchange Server 2003 Journaling*

[http://technet.microsoft.com/en-us/library/bb124642\(EXCHG.65\).aspx](http://technet.microsoft.com/en-us/library/bb124642(EXCHG.65).aspx)

## How to enable standard journaling (not required with dedicated journaling server)

<http://technet.microsoft.com/en-us/library/bb124786%28EXCHG.65%29.aspx>

## How to enable envelope journaling

<http://technet.microsoft.com/en-us/library/aa996378%28EXCHG.65%29.aspx>

## Journaling and Microsoft Exchange 2010

### Understanding Journaling

<http://technet.microsoft.com/en-us/library/aa998649.aspx>

### Create and Configure a Journaling Mailbox

<http://technet.microsoft.com/en-us/library/bb124985.aspx>

## Working with collectors

### Account owner and account administrator roles

The only two user roles that have permissions to configure Collectors are Account Owner and Account Administrator. Users with one of these roles can configure Collectors through the archive service Administrator Collectors UI.

**Figure 25** Default Administration Collectors UI

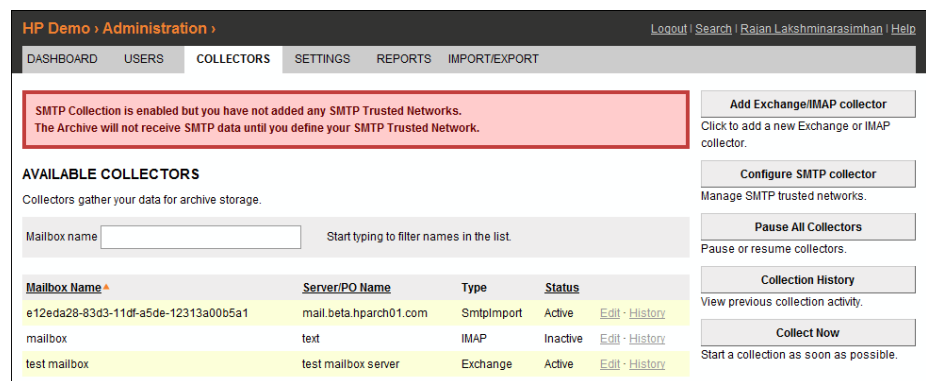


Figure 25 displays the HP ECS Archive for E-Mail default Collectors HTTPS User Interface. The default Collectors HTTPS User Interface lists all previously configured Available Collectors.

To quickly view a given mailbox, enter the mailbox name in the **Mailbox name** field to dynamically filter the record set being displayed.

To edit a given mailbox, click its associated **Edit** link to its right. To view the history of collections for a given mailbox, click its associated **History** link to its right.

To create a new collector with its associated configurations, click the appropriate button. The proper steps to configure each collector type are explicitly delineated later in this chapter.

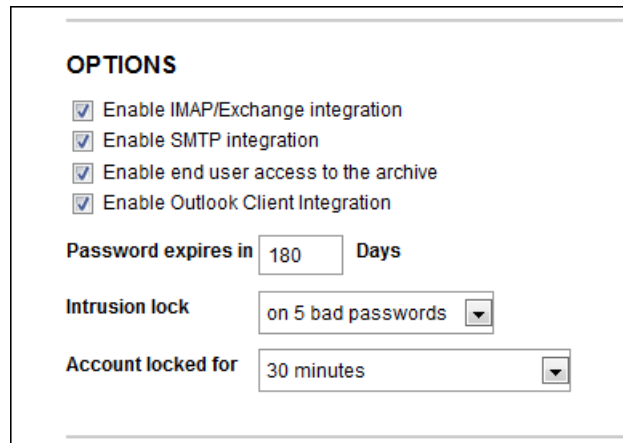
- Add Exchange/IMAP Collector
- Add Exchange/IMAP Collector - Exchange Journal
- Add SMTP Collector

To pause all collectors, click the **Pause All Collectors** button. This temporarily suspends collection services during Moves/Add/Changes or troubleshooting. The button changes to **Resume All Collectors** to reinitialize collectors when desired.

To view the collection history of all collectors, click **Collection History** to display each collection's Collector ID, the number of items archives, and the KBs or MBs of data collected.

To manually initiate a collection, click **Collect Now**. A message displays at the top of the page stating 'Your request is queued for processing' by the archive service. The requested collection process initiates in approximately one hour to collect and ingest email messages into your archive.

**Figure 26 Account Options**



The screenshot shows a window titled "OPTIONS" with the following settings:

- ☒ Enable IMAP/Exchange integration
- ☒ Enable SMTP integration
- ☒ Enable end user access to the archive
- ☒ Enable Outlook Client Integration
- Password expires in: 180 Days
- Intrusion lock: on 5 bad passwords
- Account locked for: 30 minutes

It is important to verify that your Account OPTIONS (Figure 26) are configured to allow the archive service to interoperate with the appropriate email system and collector type. If the archive service is not enabled to interoperate with a given email system or collector type the associated GUI button to click does not appear on the Collectors UI.

# Adding IMAP or Exchange Collector — Exchange Journal

Figure 27 Add IMAP or Exchange Collector — Exchange Journal

HP Demo › Administration › New IMAP Collector

DASHBOARD USERS COLLECTORS SETTINGS REPORTS IMPORT/EXPORT

### ADD IMAP OR EXCHANGE COLLECTOR

**Collector Type**

☐ Exchange Journal ☒ IMAP Journal

Select Exchange Journal if you are using Exchange Envelope Journaling.  
Select IMAP Journal for all other mail servers ([More information](#)).

**Server Information**

**Server Name**

This can be any unique value to identify the server in the archive.

**Mailbox**

This could be different from the user name used to access the mailbox.

**Interval**

Collection time interval.

**IP/DNS**

Enter the public IP address or DNS name for this server.

**Port**

Port number to communicate with the server. IMAP is typically 143 or 993.

☐ Use SSL

Use SSL if your mail server has been configured to accept IMAP over SSL connections.

**Auth. Method**

Use MD5 if it is enabled, otherwise choose None.

**Account**

**Username**

This is the user name associated with the mailbox name. This is for authorization only.

**Password**

Navigate to the archive service Administration Collectors tab and click **Add Exchange/IMAP collector**. The Add IMAP or Exchange Collector page displays, shown in [Figure 27](#).

To add an Exchange Collector for Microsoft Exchange mail servers, select the **Collector Type Exchange Journal** radio button.

- 1 Populate **Server Name** field with unique label for this mail system.
- 2 Populate **Mailbox** with the mail systems' mailbox name.
- 3 Toggle **Interval** dropdown box and choose Nightly, Weekly, or Monthly.
- 4 Populate **IP/DNS** field with public IP address or fully qualified domain name (FQDN).

- 5 Populate **Port** field with port number to establish an IMAP session from the archive service to the mail system. IETF IMAP well-known port numbers are 143 and 993, verify and enter port used on the mail system.
- 6 Select **Use SSL** checkbox if the mail server is configured for SSL.
- 7 Toggle **Authentication Method** dropdown box and select MD5 if enabled on the mail system. Default value is None.
- 8 Populate **Username** field with mailbox account username used to authorize archive service access.
- 9 Populate **Password** field with mailbox account username's password to authorize archive service access.
- 10 Toggle **Max message size** and select one of these values: 5MB, 10MB, 20MB, 30MB, 40MBs, 50MBs or 75MBs

**Figure 28 Add Exchange/IMAP Collector Options and Test**

The screenshot displays the 'Add Exchange/IMAP Collector' configuration window. It is divided into three main sections: 'Folders', 'Options', and 'Collect by Date'.

- Folders:** This section contains a 'Folder mode' dropdown set to 'Include'. Below it, a list of folders is shown with checkboxes: 'Include INBOX', 'Include [Gmail]/All Mail', 'Include [Gmail]/Drafts', 'Include [Gmail]/Sent Mail', 'Include [Gmail]/Spam', 'Include [Gmail]/Starred', 'Include [Gmail]/Trash', 'Include lisa only', 'Include lisaonlysent', and 'Include test' (which is checked). To the right, explanatory text states: 'Folder mode gives you control over data collection. Exclude: Collects from all folders EXCEPT the folders selected below. Include: Collects ONLY from the folders selected below.'
- Options:** This section has two radio buttons: 'Test mode' (checked) and 'Inactive'. Below 'Test mode' is the text 'Use test mode to collect data without deleting from the source.' Below 'Inactive' is the text 'Inactive collectors will not collect data.'
- Collect by Date:** This section has three radio buttons: 'All messages' (selected), 'Collect data older than' (with a '7 days' dropdown), and 'Begin: [calendar icon] End: [calendar icon]'. Below the last option is the text 'Collects mail between date range entered.'

At the bottom, there are two buttons: 'Test Config' and 'Add Collector'. A note next to 'Test Config' says 'Test results tell you if the settings are correct. If an error occurs possible causes are identified.'

Figure 28 displays Add Exchange/IMAP Collector UI for steps delineated below:

- 11 To explicitly define folders to collect from for a new or existing IMAP Collector, use the IMAP Collector's Folder fields. **Folder mode** dropdown field allows two options:
  - Choose **Exclude** to explicitly define folders not to be archived and check the desired folders to exclude.

- Choose **Include** to explicitly define folders to include and check the desired folders to include.

---

**NOTE** You cannot include or exclude folders unless you are properly connecting to a mailbox through IMAP.

---

- 12 Check Options **Test mode** checkbox to test connectivity and not flag the email messages as archived, a best practice. Deselect when you are ready to move from staging to production.
- 13 Check Options **Inactive** checkbox to test, a best practice. Deselect when you are ready to move from staging to production.
- 14 When a configured IMAP collector has been tested, remember to de-select the **Test mode** checkbox when you are ready to move to production. If **Test mode** remains selected, the status of the collector will be moved to an Inactive state. **Collect by Date** offers three mutually exclusive options:
  - All messages
  - Collect data older than <x days>, range is 7 days to 510 days. For example, use this option if IT wants to manage mail system resources and network utilization during initial setup and incrementally pull data.
  - Begin: and End: fields must be set with calendar applet. For example, use this option if IT wants to manage mail system resources and network utilization during initial setup and incrementally pull data stipulated by date range.
- 15 Click **Test Config**
  - If parameters are correct a congratulations message is displayed. Click Add Collector to add the new IMAP Collector. The new Exchange IMAP Collector is then displayed in the Available Collectors UI.
  - If parameters are incorrect an error message is displayed with possible solutions.

## Google Apps and SSL connection requirement

While configuring IMAP on a Google Apps instance, **Test Config** is successful only when the port is specified as 993 and the SSL checkbox is checked. Gapps only allows SSL connections.

**Figure 29 Add IMAP or Exchange Collector and Available Collectors UI for Exchange Journal**

**HP Demo > Administration > New IMAP Collector** [Logout](#)

**DASHBOARD USERS COLLECTORS SETTINGS REPORTS IMPORT/EXPORT**

### ADD IMAP OR EXCHANGE COLLECTOR

**Collector Type**

☒ Exchange Journal ☐ IMAP Journal

Select Exchange Journal if you are using Exchange Envelope Journaling.  
Select IMAP Journal for all other mail servers ([More information](#)).

**Server Information**

**Server Name**   
This can be any unique value to identify the server in the archive.

**Mailbox**   
This could be different from the user name used to access the mailbox.

**Interval**   
Collection time interval.

**IP/DNS**   
Enter the public IP address or DNS name for this server.

**Port**   
Port number to communicate with the server. IMAP is typically 143 or 993.

☐ Use SSL  
Use SSL if your mail server has been configured to accept IMAP over SSL connections.

**Auth. Method**   
Use MD5 if it is enabled, otherwise choose None.

**Account**

**Username**   
This is the user name associated with the mailbox name. This is for authorization only.

**Password**   
Password for the user name account.

**Messages**

**Max message size**   
Messages greater than the maximum value will not be collected.

**Folders**

**Folder mode:**   
Folder mode gives you control over data collection.  
Exclude: Collects from all folders EXCEPT the folders selected below.  
Include: Collects ONLY from the folders selected below.

**Only archive these folders:**

Figure 29 displays an example of an 'Add IMAP or Exchange Collector - Exchange Journal' UI. Figure 30 shows an example of a new Exchange collector type displayed in Available Collectors UI after successfully adding an Exchange IMAP Collector.

**Figure 30 A new Exchange Collector type displayed**

HP Demo > Administration > [Logout](#)

DASHBOARD USERS **COLLECTORS** SETTINGS REPORTS IMPORT/EXPORT

SMTP Collection is enabled but you have not added any SMTP Trusted Networks.  
The Archive will not receive SMTP data until you define your SMTP Trusted Network.

**AVAILABLE COLLECTORS**

Collectors gather your data for archive storage.

Mailbox name  Start typing to filter names in the list.

Mailbox Name ▲	Server/PO Name	Type	Status	
test mailbox	test mailbox server	Exchange	Active	<a href="#">Edit</a> · <a href="#">History</a>
test mailbox	test mailbox server	IMAP	Inactive	<a href="#">Edit</a> · <a href="#">History</a>
test mailbox	test mailbox server	Exchange	Active	<a href="#">Edit</a> · <a href="#">History</a>

## Adding SMTP collector and trusted network — Exchange SMTP

Make sure you are logged in as Account Owner Administrator, then navigate to Administration - Account Options.

**Figure 31 Account Options Enable SMTP integration**

**OPTIONS**

- ☒ Enable IMAP/Exchange integration
- ☒ Enable SMTP integration
- ☒ Enable end user access to the archive
- ☒ Enable Outlook Client Integration

Password expires in  Days

Intrusion lock

Account locked for

Account Options **Enable SMTP integration** is enabled by default, see [Figure 31](#). To disable SMTP collections, log on to archive service Administration Account UI and deselect the Enable SMTP Integration checkbox. Click **Update account** at the bottom of the page to confirm modification.

The archive service queues and processes the SMTP integration request and automatically generates a unique mailbox name hash. The mailbox SMTP address is then displayed on the Collectors UI. The mailbox SMTP alias is the address

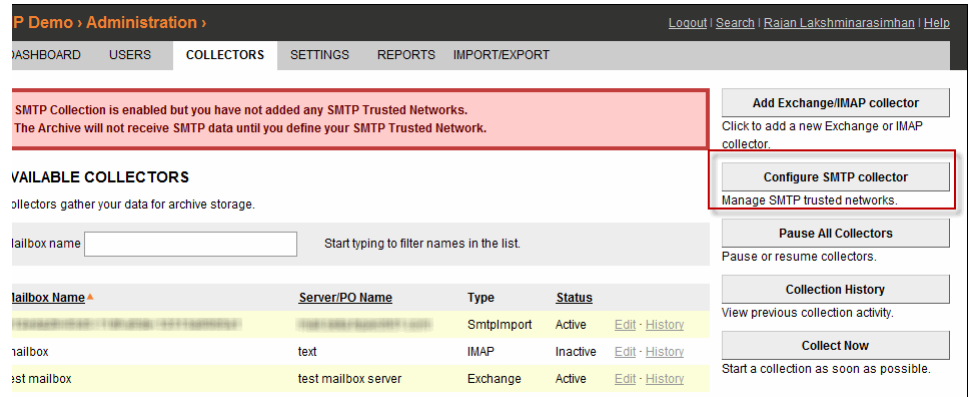


used to configure Microsoft Exchange Envelope Journaling as the recipient of forwarded messages from Exchange envelope journaled mailbox to the archive service Collector mailbox via SMTP.

When SMTP Collection is enabled for the first time, the following message appears at the top of the Account page:

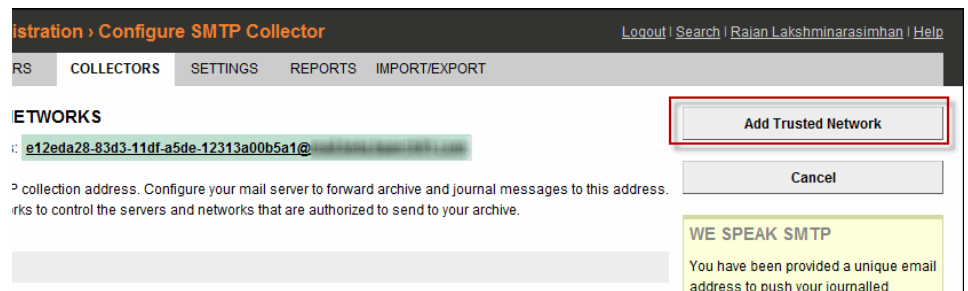
'SMTP Collection is enabled but you have not added any SMTP Trusted Networks. The Archive will not receive SMTP data until you define your SMTP Trusted Network.'

**Figure 32 Configure SMTP collector**



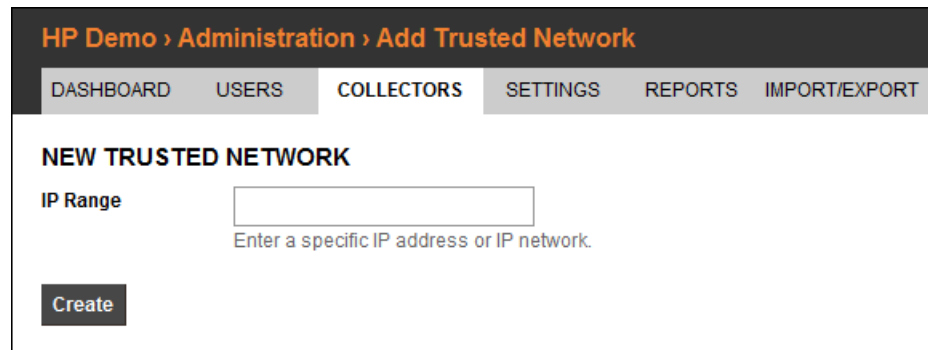
Click **Configure SMTP collector** (see [Figure 32](#)) button to begin setup of the archive service to establish SMTP sessions between the archive service network and organization's email server network.

**Figure 33 Add Trusted Network - SMTP**



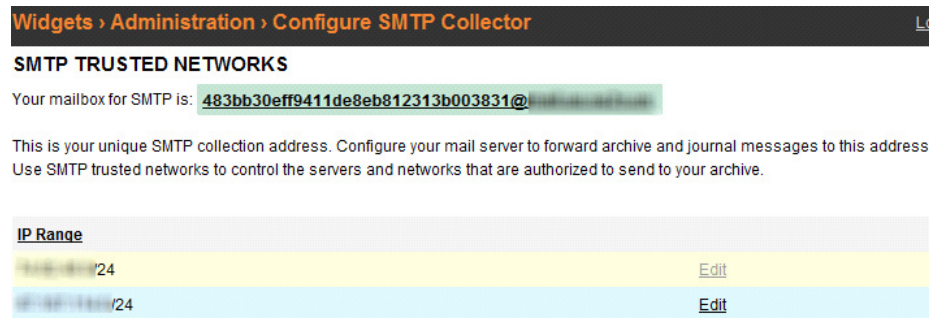
Click **Add Trusted Network** shown in [Figure 33](#).

**Figure 34 New Trusted Network IP Range**



In the NEW TRUSTED NETWORK UI (shown in [Figure 34](#)) IP Range field enter the unique public IP address of your mail system, or IP subnetwork address of the segment where your email system resides, in standard Classless Interdomain Routing (CIDR) IPv4 format, e.g. dotted decimal address/# of subnetmasked bits. Click **Create**.

**Figure 35 SMTP Trusted Networks**



IP Range	Edit
192.168.1.1/24	Edit
10.10.10.1/24	Edit

[Figure 35](#) shows the SMTP TRUSTED NETWORK UI that now displays the new trusted network you just added (and any other previously configured SMTP trusted networks).

## SMTP and encryption as a best practice

HP ECS Archive for E-Mail supports secure SMTP over TLS using STARTTLS. While this is not required, it is recommended as a best practice, and it is available for those who wish to take advantage of the additional security. By configuring your SMTP sending server with a preference to SMTP/TLS when delivering journal email, the TCP session will be encrypted.

## IMAP security with SSL as a best practice

Whenever possible, it is recommended as a best practice to use SSL to encrypt the connection between the archive and your email server. If SSL encryption is not possible, please consider using SMTP instead of IMAP.

Use SSL certificates created by reputable certificate of authorities (CA) to ensure the best possible secure connection. Try to avoid self-signed certificates since they may not pass tests to verify the true owner.

You can create your own firewall rules to accept only inbound IMAP connections from the archive's published IP address ranges. You can also use NAT and port redirection to obscure your public IMAP port (143 or 993) to a random high number.



- In this chapter:*
- [Policies](#)
  - [Settings](#)

In this chapter you will learn how to create, define and configure archive system policies, settings, rules and login messages.

The concept of HP ECS Archive for E-Mail policies is very broad. [Chapter 1, Introduction](#) lists several well-known U.S. and international regulations that are the bases of email compliance and e-discovery corporate and non-profit policies. For example, the Sarbanes-Oxley, SEC, NASD, and FIPPA organizations regulate journaling and email litigation rules.

The email archive system accommodates multiple aspects of any organization's email archival needs. This comprehensive email archive software provides Account, User, Collector configuration and more, over a Secure Socket Layer (SSL) and file encryption system.

The objectives of this chapter are:

- To identify and configure Policy attributes for automatic message removal.
- To identify and configure Setting attributes for your personal account settings, rules for your end users, and system-wide login messages.

## Policies

### Email retention policies—automatically removing items older than X days

The **Policies** tab is used for configuring email retention policies. An email retention policy sets a system-wide attribute to remove email messages from the archive based on timestamp.

The automatic retention policy feature may be enabled or disabled globally across the whole archive account. When the automatic retention policy is enabled, messages older than the specified number of days will be purged from the archive. Messages will cease to be discoverable through search within 24 hours of the policy threshold being reached.

The default setting is disabled (meaning that the automatic retention policy is turned off).

Items with legal hold status are always preserved. If legal hold is removed, the message(s) that are older than the specified retention period will be removed upon the next purge event.

**Figure 36 Policies page**

The screenshot shows the 'Policies' page in an administration interface. At the top, there is a navigation bar with 'Sample > Administration > Policies' and user information 'Logout | Search | Steven Smith | Help'. Below this is a tabbed interface with tabs for 'DASHBOARD', 'ACCOUNT', 'USERS', 'COLLECTORS', 'POLICIES' (which is active), 'SETTINGS', 'REPORTS', and 'IMPORT'. The main content area is titled 'AUTOMATIC POLICY'. It contains a checkbox for 'Enable Automatic Policy:' which is currently unchecked. Below this is a text input field for 'Remove items older than X days:' with the value '2555'. A small text block explains that items with a legal hold status are preserved. There is an 'Update' button. To the right of the main form is a 'Cancel' button and an 'Automatic Purge History' button. On the far right, there is a yellow box titled 'EMAIL RETENTION POLICIES' which contains instructions to create automatic retention policies and a list of example values: 3 Years = 1095 days, 5 Years = 1825 days, and 7 Years = 2555 days.

Navigate to the Administration Policies tab, shown in [Figure 36](#).

Select the **Enable Automatic Policy** checkbox.

In the field **Remove items older than X days**, enter the desired value, then click **Update**.

---

**NOTE** There is no upper value boundary to this field.

---

Here are a few example values for three-, five- and seven-year periods expressed in terms of days:

- 3 Years = 1095 days
- 5 Years = 1825 days
- 7 Years = 2555 days

## Purge history

For every purge event, there will be an entry on the **Purge History** page. To access the **Purge History** page, select the **Automatic Purge History** button from the **Policies** page.

**Figure 37 Automatic Purge History page**

rainy > Administration > Automatic Purge History

Logout | Search | My Archive

DASHBOARDACCOUNTUSERSCOLLECTORSPOLICIESSETTINGSREPORTSIMPORT

AUTOMATIC PURGE HISTORY

Cancel

Date	Eligible Messages	Purged	On Legal Hold	Not Purged	
Wed Nov 17 14:08:00 +0000 2010	44	40	4	0	<a href="#">Details (zip file)</a>
Wed Nov 17 11:36:25 +0000 2010	465	461	4	0	<a href="#">Details (zip file)</a>

Show max10▼

The Purge History contains the following information:

- **Date:** A timestamp for the purge event.
- **Eligible Messages:** Messages eligible to be purged (the original date of the message met the retention criteria).
- **Purged:** Number of messages actually purged.
- **On Legal Hold:** Number of messages not purged due to legal hold status.
- **Not Purged:** Number of messages not purged due to some other issue (unable to determine eligibility or legal hold status; rare, if network issues when querying or some environmental issue such as this - these messages would be purged at the next purge event).
- **Details** (download link): Link to a .csv file containing a list of messages purged and not due to legal hold.

### Purge Details

For every purge, a summary report is available and may be downloaded from the **Automatic Purge History** page by clicking on the **Details** download link. The download contains a .csv file containing information about what was and was not purged.

For auditing purposes, the original message date and message-ID is provided. The original message date is included as proof that the message was in fact rightly purged based on the retention policy.

## Settings

### Your Settings

The HP ECS Archive for E-Mail HTTPS Administration Settings features provide the ability to fine tune individual personal settings, end user access rules and login messages.

**Figure 38 Administration - Settings - Your Settings**

HP Demo > Administration >

DASHBOARD USERS COLLECTORS **SETTINGS** REPORTS IMPORT/EXPORT

Your Settings [End User Access Rules](#) [Login Messages](#)

**ACCOUNT**

User name

First name

Last name

Password

Retype Password

Email

Retype Email

**GENERAL**

Items per page

Default page

Time zone

Default View

Log on to your email archive system as an administrator and from the default Administration Dashboard click Settings - Your Settings tab, shown in [Figure 38](#). You may also navigate to the Settings UI if already logged into the archive service Administration UI by simply clicking the Settings tab then Your Settings tab.

Modify User Account field with unique personal criteria. User Account standard parameters are maintained: The User name and email address fields must be unique system wide, and passwords must be alphanumeric with at least three numbers. If given field value is not valid, an error message displays citing an incorrect parameter, review and correct inputs.

Modify User **General** fields with preferred personal criteria to customize personal user interfaces. Use the drop-down menus to set each attribute value. Available selections are as follows:

- 1 **Items per page:** Sets End User and Search items per page: 10, 25, or 50.
- 2 **Default page:** Sets your default login page: Admin dashboard, Search dashboard, Search list. The available selections will vary depending on user permissions.
- 3 **Time zone:** Sets your personal time zone.
- 4 **Default View:** Sets your preferred search view.
  - Normal View - Default view that displays SMTP message header and snippet of body content.



- Mini View - Displays SMTP message header content only.
- Text View - Displays SMTP message header and full body content with option to Expand Extra headers to expand SMTP header and X-Arc\* type message headers.

Click **Update** to apply settings. When successful, the message 'Your settings have been successfully updated' displays at the top of the page. General settings are effective immediately except for the Default page setting, which takes effect the next time the user logs into the system.

## End user access rules

The concept of End User Access Rules is to impose restrictions on SMTP domains for end users that self-register to the archive service via an HTTPS browser session (<https://<instancename>.hpecsarchive.com/user/signup/new>). Restrictions limit end user access and system vulnerability and improve security.

**Figure 39 Administration - Settings - End User Access Rules**

The screenshot shows the 'HP Demo Administration Settings' interface. At the top, there's a navigation bar with 'DASHBOARD', 'USERS', 'COLLECTORS', 'SETTINGS' (highlighted), 'REPORTS', and 'IMPORT/EXPORT'. Below this, there are three tabs: 'Your Settings', 'End User Access Rules' (selected), and 'Login Messages'. The main content area is titled 'CONTROL WHO IS ALLOWED TO SELF-REGISTER AN ACCOUNT'. It explains that allow and deny rules control email addresses for self-registration. Under 'Allow rules:', it provides instructions on using wildcards and lists a text input field. Under 'Deny rules:', it provides similar instructions and lists another text input field. At the bottom left, there is an 'Update' button.

Logon to your email archive system as an administrator and from the default Administration Dashboard click Settings - End User Access Rules tab, shown in [Figure 39](#).

The End User Access Rules concept is based on typical allow and deny rules-based policy and all SMTP aliases are denied by default. Allow rules explicitly define SMTP aliases to allow access. Deny rules explicitly define SMTP aliases to deny access.

For example, to allow access from all locations except free email sites such as Yahoo, Hotmail, and Gmail, add an allow rule for `*@*` and a Deny rule for `*@gmail.com`, `*@yahoo.com`, and `*@hotmail.com`.

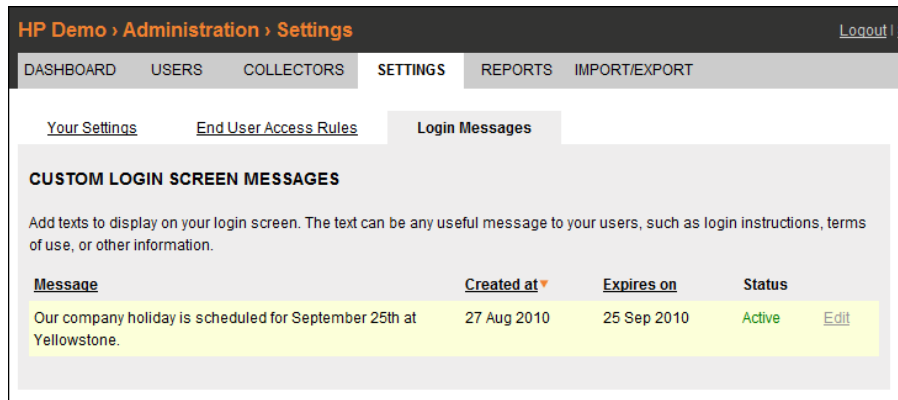
Click **Update** to apply settings. The message 'The access lists have been updated.' displays at the top of the page.

If an end user registers with an invalid or denied SMTP alias, the archive service system does not send an email notification to the SMTP alias. Therefore, the email notification reply cannot be sent to the invalid or denied SMTP alias and the self-registered account never activates.

# Login messages

The concept of Login Messages is to conveniently display messages on your archive system login HTTPS URL to communicate with all end users.

**Figure 40 Administration - Settings - Login Messages**



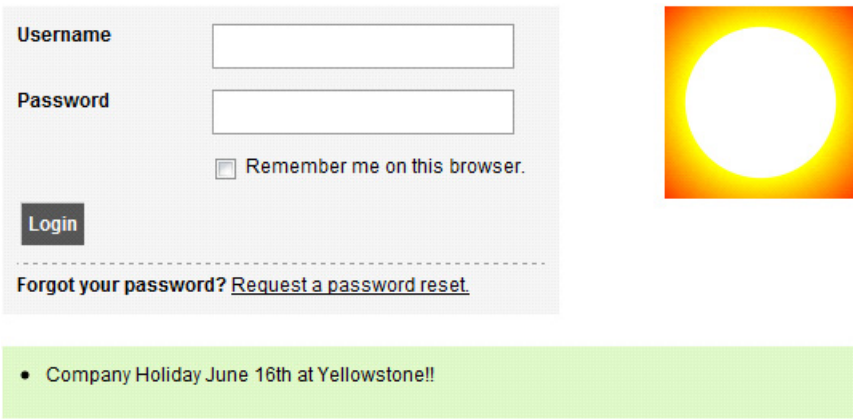
Log on to your email archive system as an administrator and navigate to Administration - Settings - Login Message tab, shown in Figure 40.

Click **New message** and define:

- **Message:** Enter Text to display on your archive service login screen.
- **Starts On:** Click calendar applet and select start date for your message.
- **Expires On:** Click calendar applet and select date for your message to expire.

The archive service posts an update “Message was successfully created” at the top of the Login Messages UI. Log out and navigate to your archive service default HTTPS URL and verify message appears if date falls within range defined. One option is to define your message with current date setting to verify correct message text appears as desired and then modify date range after test.

**Figure 41 Login Message example**



For example, Figure 41 displays Customer Login Screen Message 'Company Holiday June 16th at Yellowstone!!'



- In this chapter:*
- [Report builder options](#)
  - [Sample report](#)

The objectives of this chapter are as follows:

- 1 Identify archive service user accounts allowed to run reports.
- 2 Identify and describe several available Report types:
  - Activity by User
  - Activity by UI Action
  - Activity by Date
  - ECI Activity by User
  - Collection by Mailbox
  - Collection by Date
- 3 Identify and describe format options
- 4 Identify and describe date range options
- 5 Identify and describe sort options

## Report builder options

The following archive service user roles have permission to run reports:

- Account Owner
- Account Administrator
- Search Admin Plus

Reports can be generated in PDF or CSV format and are sent directly to the designated user's inbox.

Navigate to the Reports tab and stipulate Report Builder options.

**Figure 42 Report Builder Options**

The screenshot displays the 'HP Demo > Reports' interface. At the top, there is a navigation bar with links: DASHBOARD, SEARCH, SETTINGS, POLICIES, and REPORTS. The 'REPORTS' link is highlighted. Below this, the 'REPORT BUILDER' section contains several configuration options:

- Choose report:** A dropdown menu currently showing 'Activity by User'. Below it, the text 'Choose report type.' is visible.
- Format option:** Two radio buttons are present: 'PDF' (which is selected) and 'CSV'. Below them, the text 'Download report in PDF or CSV format.' is displayed.
- Date Range:** A dropdown menu currently showing 'Last Week'. Below it, the text 'Date range controls information for your report.' is visible.
- Begins on:** A text input field containing 'August 09, 2010'.
- Ends on:** A text input field containing 'August 15, 2010'.
- Sort options:**
  - Order by:** A dropdown menu currently showing 'User'.
  - Sort order:** Two radio buttons are present: 'Ascending' (which is selected) and 'Descending'.

At the bottom of the form, there is a dark button labeled 'Create Report'.

Configure your archive service with your desired Report Builder Options, displayed in [Figure 42](#).

- 1 From the **Choose report:** drop-down menu, select one of the following report types:
  - Activity by User - reports actions executed by user, for example, UserLogin, SearchCreation, SearchAccess, ExportAvailable.
  - Activity by UI Action - reports User Interface activity, for example, BulkTagActivity, CollectNowRequested, CollectNowCompleted, CollectorEdit, EciLogin, etc.
  - Activity by Date - reports activity sorted by date
  - ECI Activity by User - reports email client integration activity
  - Collection by Mailbox - reports collections per mailbox
  - Collection by Date - reports collection by date
- 2 Stipulate a format option:
  - PDF
  - CSV (Comma Separated Values)
- 3 From the **Date Range** drop-down menu, select one of the following date range options:
  - Last Week

- This Week
- Last Month
- This Month
- Last Quarter
- This Quarter
- Last Year
- This Year
- All
- Custom

---

**NOTE** Except for the **Date Range** choices *All* and *Custom*, each selection populates the date range fields with pre-defined dates. These pre-defined date ranges cover most reporting needs. Selecting *All* leaves the **Begins on** and **Ends on** fields empty and will place no date restrictions on the report. Selecting *Custom* causes a date selection tool to display next to the **Begins on** and **Ends on** fields. Use the date selection tools to choose a custom date range.

---

4 Sort options:

- From the **Order by** drop-down menu, select from these criteria:
  - User, Date, Activity
- For **Sort order**, select the Ascending or Descending radio button.

Click **Create Report**. A confirmation message appears at the top of the page stating that the report will be sent by email.

---

**NOTE** When viewing a report that is generated with the CSV format option, a string of “#####” symbols in the date column indicates that the date column is too narrow to display the date correctly. To fix this, widen the date column in the spreadsheet until the date displays correctly.

---

## Sample report

**Figure 43 Sample Report**

<i>HP Demo, Activity By User</i> Generated at 23:48 on 2010-08-27			
User	Date	Action	Times
Joe Fajen	2010-08-19	UserCreation	1
	2010-08-19	UserLogin	1
Rajan Lakshminarasimhan	2010-08-17	UserLogin	1
	2010-08-18	UserLogin	7
	2010-08-19	UserLogin	6
	2010-08-19	CollectorCreation	1
	2010-08-19	CollectorEdit	2
	2010-08-19	SearchCreation	1
	2010-08-19	SearchAccess	1
	2010-08-20	UserLogin	8
	2010-08-20	SearchAccess	1

Figure 43 displays a sample Report from the large variety of archive service Report options available.



*In this chapter:*

- [High-level summary of the data import work flow](#)
- [Creating the import job](#)
- [Preparing data for import](#)

The concept of the archive service Import function is to process bulk data import requests. When you subscribe to the archive service, HP offers the option of importing legacy email archives into HP ECS Archive for E-Mail.

## High-level summary of the data import work flow

- 1 Customer creates an import job.
- 2 HP is notified by email.
- 3 HP ships a storage device to the customer; alternatively, the customer may provide its own device.
- 4 Customer prepares and encrypts the data.
- 5 Customer places the data onto the device and ships it to HP at the following address:

HP Enterprise Cloud Services Archive for E-Mail Support  
19091 Pruneridge Ave.  
Cupertino, CA 95014

- 6 HP receives the device, inspects it for integrity and object size, then imports the data.
- 7 After the data has been imported, HP electronically shreds the data on the device. The data shred option is built into the archive service, and it is enabled by default. In the event that the customer uses their own storage device, they will have the option to not shred the data following the import.

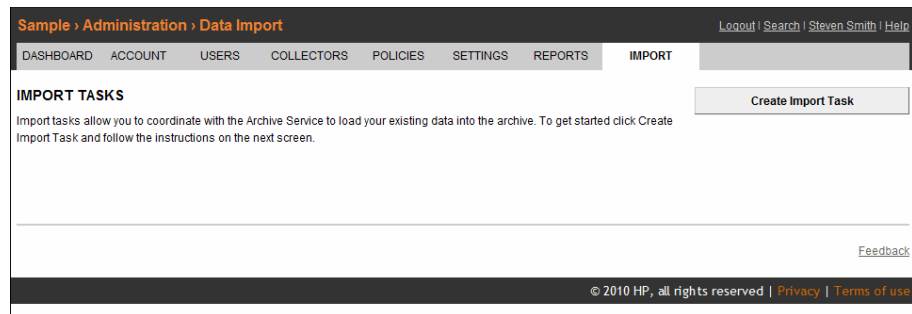
After shredding, the data is not recoverable and the files on it display as containing zero bytes. The device will require reformatting before it can be re-used.

- 8 Customer refers to the Import Task list for status.

## Creating the import job

To request a legacy email data import, select the **Admin** link, then the **Import** tab. The **Import Tasks** page displays.

**Figure 44** The Import Tasks page



From the **Import Tasks** page, select **Create Import Task**. The **New Import Task** page displays.

By filling out the New Import Task form, you are providing contact information on who is requesting the import and where the drive should be shipped after the data has been transferred at the data center.

**Figure 45 The New Import Task page**

**Sample > Administration > New PST Import**

DASHBOARD ACCOUNT USERS COLLECTORS POLICIES SETTINGS REPORTS **IMPORT**

### NEW IMPORT TASK

**Name**   
Your first and last name

**Telephone**   
Telephone number to contact you for this task

**Email**   
Email Address to contact you for this task

**Your shipping address to receive express packages:**

**Company**   
The company name to use for deliveries

**Street**   
The physical address to receive a delivery

**Other**   
Mailstop, routing code, or other address information

**City**   
Shipping address city

**State**   
Shipping address state or province

**Country**   
Shipping address country

**Post code**   
Postal code for this address

**Describe this import task**

**Task name**   
Brief description for this import. Ex: "June 2010 PST files"

**Size of data**   
Approximate total size in gigabytes

☐ **Individual files are larger than 5 Gb**  
The Archive Services needs to know if any individual file is larger than 5 Gb. This is not the total size of all files.

☒ **My files are encrypted**  
I have encrypted files and need to tell you the password(s).

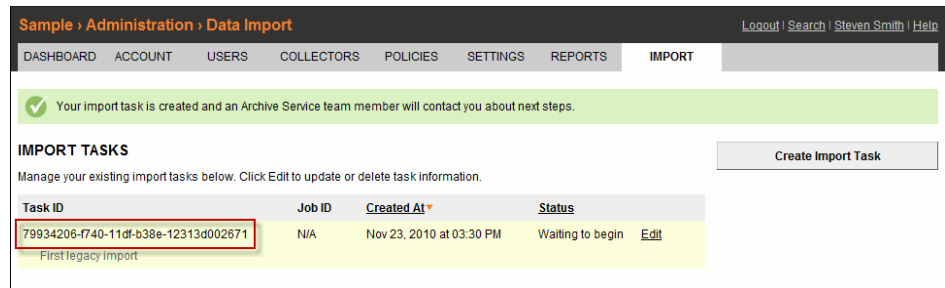
**Additional details**  
Any other information that will be helpful for the Archive Service to know about this task.

**Submit Import Task**

After you have completed the form, select **Submit Import Task**. The **Import Tasks** page displays showing the import task that you just submitted. It is now waiting to begin.

**NOTE** Make a note of the Import Task ID outlined in red in [Figure 46](#). You will need this number for the data encryption process.

**Figure 46 Import Task waiting to begin**



Your legacy email data can be successfully imported using the popular PST mail file format. The following section provides guidance on how to work with the PST format, commonly used by Microsoft Outlook.

## Preparing data for import

When preparing your data for processing, you will be responsible for encrypting the data that will be placed on the portable storage media device.

**WARNING!** In order to be uploaded into your archive, all file objects on the portable media device must be below 5 GBs.

HP recommends using the program 7-zip (<http://www.7-zip.org/>) which allows for AES-256 bit encryption. You must use your Import Task ID (see [Figure 46](#)) as your password for encrypting your files.

## PST Format

The PST (Personal Storage) folder format is used by Microsoft Outlook to store messages on local desktops. The PST format is a single file that holds all folders and messages. You will need to provide each PST file as a separate file which must not be secured with any password protection. Name the PST file and copy it onto the hard drive you will be shipping.

PST files may be generated in a couple of ways.

- Directly by users; or
- Through an automated application such as exmerge, which extracts messages from your Exchange Server into a collection of PST files.

The PST file format can hold information other than just messages, such as tasks, notes and contacts. This additional information is stored as a message and can, if required, be imported into the archive. However, there will be no differentiation between these various information types since imported data is searchable by email and/or attachment.

## Requirements for naming PST files

As part of the PST import process, we will need to know the primary email address of the user for each PST file in order to assign ownership of the message after being imported into the archive system.

If you have used a utility such as exmerge, this will typically name the PST files based on the nickname of the user in your Active Directory configuration. We ask that you rename each PST file generated to match the individual to whom the PST belongs.

For example, user Simon Bloggs' mailbox has been extracted from the Exchange server, and the exmerge utility is likely to call the PST file whatever his alias is (SBloggs.pst). The file must be renamed to sbloggs@domain.com.pst (retain the PST file extension). Where you have multiple PST files for an individual, please simply add a number to the end of the address:

- sbloggs@domain.com.1.pst
- sbloggs@domain.com.2.pst
- sbloggs@domain.com.3.pst

If, however, you have acquired PST files created directly from your end users who have copied messages to them from Outlook, then it is likely that they will be arbitrarily named. Since there is no way to accurately ascertain who each PST file belongs to in the organization, we will need you to ensure that the naming convention cited here is upheld.

**Table 1      Supported physical media**

<b>ITEM</b>	<b>REQUIREMENT</b>
Power for External Devices	US wall socket plug 120 Volts @60 Hertz Max Power Consumption 2,000 Watts
Interface Type	eSATA USB 2.0; 2.5 inch and 3.5 inch internal SATA
Dimensions	Max device size is 14 inches high by 19 inches wide by 36 inches deep (8Us in a standard 19 inch rack)
Weight	Maximum is 50 pounds
File System Type	NTFS, ext2, ext3, FAT32
Device Capacity	Up to 4 TB

*In this chapter:*

- Bulk export of archive data

If you decide at any point in time to unsubscribe from the archive service, you may request bulk export of your data. Please contact HP directly for more details regarding the export of archived data and options.

## Bulk export of archive data

You may request bulk export of all your archived email data, or a large subset such as a monthly or quarterly archived data set. The archive service processes the export in one of two ways:

- 1 From the Import tab, you will be able to access an export wizard. The wizard will prompt you to provide answers for several questions similar to the ones you were asked when a bulk import job was created (see [Figure 45](#)). Subsequently, HP will ship to you a storage device containing your bulk export data. As an option the data can be encrypted before shipment at the customer's request using the program 7-zip (<http://www.7-zip.org/>) which allows for AES 256-bit encryption.
- 2 Alternatively, HP will provide you with a link you can use to download your bulk export.

All file formats and utilities described for bulk imports are supported for bulk exports.

---

**NOTE** Export of Search results is a uniquely different archive service process than bulk export. Refer to [Chapter 10, Searching](#), for more information regarding Search result export options.

---





*In this chapter:*

- [Search basics](#)
- [Starting a new search](#)
- [Original mail client view and search results view](#)
- [Editing a saved search](#)
- [Viewing search summaries](#)
- [Viewing searches](#)
- [Exporting search results](#)
- [Auditing search activity](#)
- [Working with saved search results](#)

In this chapter, you will learn how to fully leverage your HP ECS Archive for E-Mail search functionality, with which you can create, execute, manage, view and export searches.

The archive service search functionality is based on the concept of providing corporate IT administrators the capability to efficiently and effectively query archived email message data within a secure environment.

When searching, carefully consider the reason for your search and the criteria necessary to yield the best search results. For example, you may need to search your HP ECS Archive for E-Mail to comply with eDiscovery legal compliance requirements, to investigate allegations of sexual harassment, or to query for all correspondence from a given business partner.

After carefully defining your search criteria, locate the desired type of search from the many examples in this chapter and follow the configuration instructions provided.

To select from among the available search configuration options clearly, this chapter presents step-by-step instructions on how to configure and run your archive service searches.

The objectives of this chapter are:

- To identify and describe search attributes;
- To describe the range of search configuration options and their correct usage.

## Search basics

**Figure 47 Search Archive User Interface**

Name	Modified	User	Accessed	Hits	Res	Exp
Test Search 1	19 Aug 10	accountadmin	20 Aug 10	1	0 (n/a)	<a href="#">Edit</a> · <a href="#">Summary</a> · <a href="#">Views</a> · <a href="#">Audit</a>
Test Search 2	30 Aug 10	accountadmin	30 Aug 10	1	0 (n/a)	<a href="#">Edit</a> · <a href="#">Summary</a> · <a href="#">Views</a> · <a href="#">Audit</a>
Test Search 3	30 Aug 10	accountadmin	30 Aug 10	1	0 (n/a)	<a href="#">Edit</a> · <a href="#">Summary</a> · <a href="#">Views</a> · <a href="#">Audit</a>

To access your archive service search features and capabilities, log on to your archive service with proper search permissions and select the Search tab (see [Figure 47](#)).

A second option is to access the archive service search functions from the Dashboard tab (see [Figure 48](#)).

The following user accounts have administrative search permissions:

- Search Admins (SA) can create new searches and manage search settings.
- Search Admin Plus (SAPLUS) users can create new searches, manage search settings and access reports.
- Search Users (SU) are limited to accessing searches created by Search Admins. Search Users must also be granted access to searches by Search Admins.

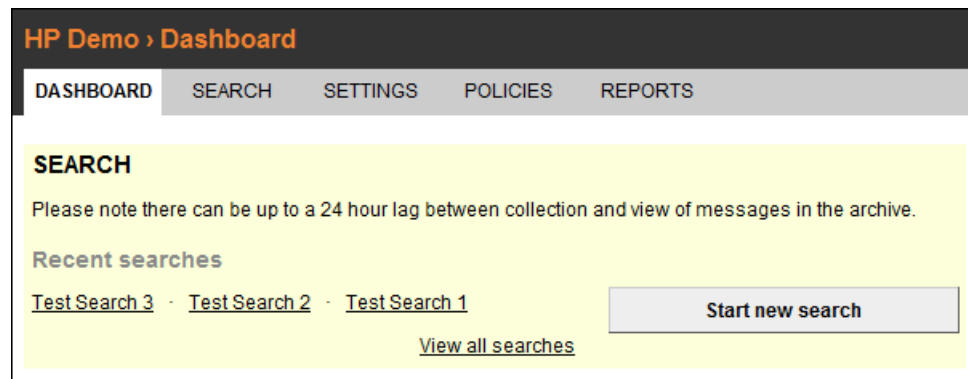
**NOTE** Archive service administrators may enable end user access to the archive system-wide and permit End Users (EUs) to access only their archived email data. EUs access and query their archived data via the My Archive Message Archive user interface. My Archive is an End User interface only with no administrator capabilities or functionality.

Time required to execute a search depends on the number of GB or TB of data to search and criteria, ranging from milliseconds upwards.

If you initiate a collection cycle (Collect Now), please allow at least 24 hours for the archive service to archive and index the data before executing a search against new archived data. This is typically the longest window of time experienced in the field for the archive service to queue your collection request, execute collection request, index data, and await new search queries.

For each search capability, the steps clearly outline options specific to each search topic. Follow the steps that match your desired results.

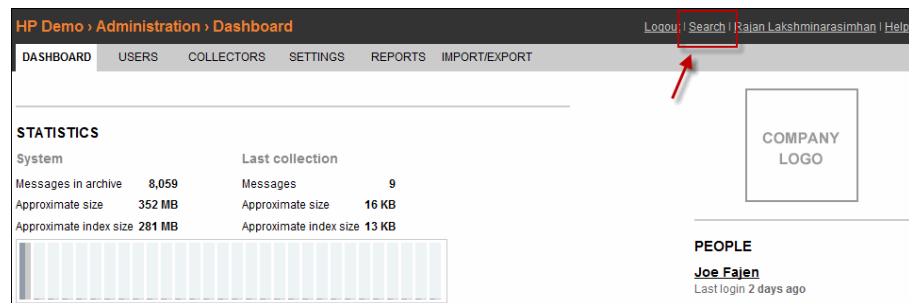
**Figure 48 Archive Service Dashboard Search page**



From the Dashboard, you can quickly view search-specific hyperlinks to relevant content and high-level statistical data points as follows:

- **Recent searches:** Displays recent searches in the format of <searchname> hyperlinks; click a given link to jump to that saved search.
- **View all searches:** Links to the Search page Displaying All Saved Searches page (see [Figure 50](#)).
- **Start new search:** Links to the New Search page (see [Figure 50](#)).

**Figure 49 Administration Dashboard Search link**



A third option is to access the Search page from any of your archive service Administration pages (see [Figure 49](#)); click the Search hyperlink.

# Starting a new search

Figure 50 Start new search: Dashboard and Search pages

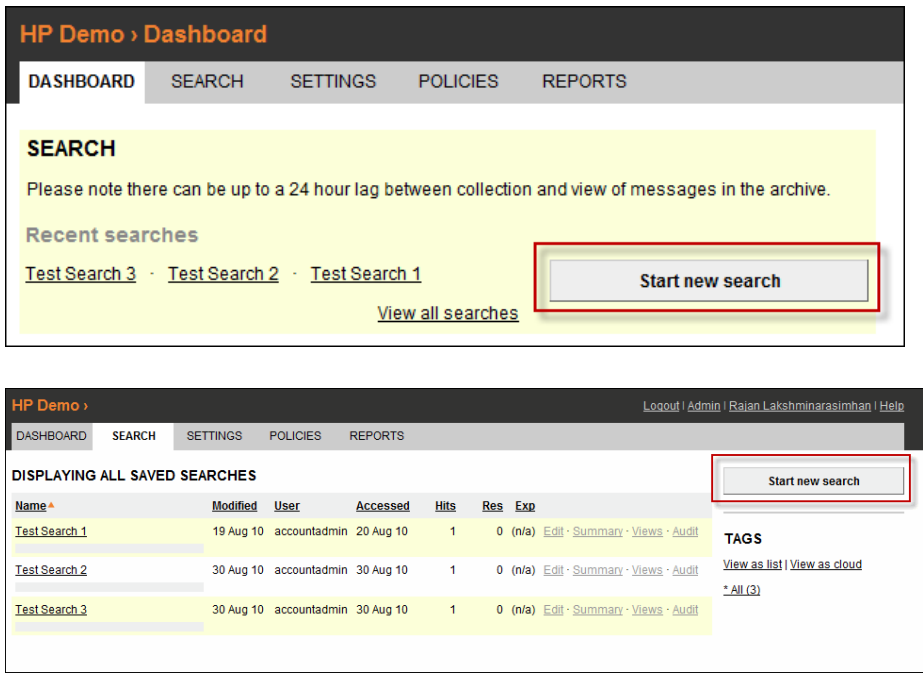


Figure 50 displays two archive service page options to start a new search. Two options to initiate a new search are:

- 1 Log on to the archive service, select the Dashboard tab, and click **Start new search**.
- 2 Log on to the archive service, select the Search tab, and click **Start new search**.

## Simple search

A Simple search is the easiest method to run a search with basic criteria.

- 1 Log on as Account Admin, Search Admin, or Search Admin Plus. Select the Search tab to view the Displaying All Saved Searches page (see [Figure 50](#)).

**Figure 51 Start New Search - Simple tab**

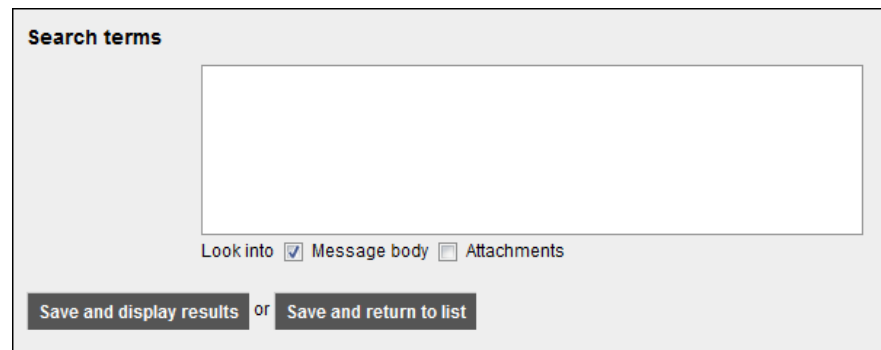
The screenshot shows the 'HP Demo > Search Archive > Add New Search' page. The 'SEARCH' tab is selected in the top navigation bar. The 'NEW SEARCH' section has three tabs: 'Simple' (selected), 'Wizard', and 'Advanced'. The 'Simple' tab contains the following fields and links:

- Name:** A text input field with the placeholder text 'Give your search a unique name.'
- Tags:** A text input field with the placeholder text 'Tags are optional and help to categorize searches.'
- Permissions:** A link to view and assign permissions.
- Note:** A large text area with the placeholder text 'Describe the search with an optional note.'
- Limit search within a date range:** A section with a 'Range' dropdown menu set to 'Custom'. Below it are two rows: 'Begins on' and 'Ends on', each with a text input field and a calendar icon.

- 2 The Create New Search – Simple tab is selected (see [Figure 51](#)).
  - a Populate the Name field to give your search a unique name.
  - b Populate the Tags field or click the Tags link to view previously created Tags. Tags are used to categorize searches. You use tags to expeditiously review searches associated with a given tag, for example, “CompanyACorrespondence.”
  - c Click the Permissions link and assign user permissions:  
Options: Access, Change Scope, Export
  - d Enter a note in the Note field to describe your new search.
  - e Click the Range drop-down menu to select a predefined date range.
  - f Click the calendar icon to define a custom date range for the “Begins on” parameter.
  - g Click the calendar icon to define a custom date range for the “Ends on” parameter. If this parameter is left blank, every time the saved search is executed it will have the most up to date results.

Again, as mentioned earlier in this chapter, you may select a unique permutation of these steps described above to fit your own unique search criteria needs.

**Figure 52 Start New Search - Simple tab - Search terms**



- h** Populate the Search terms field with search criteria. Separate multiple search terms with a comma delimiter (see [Figure 52](#)).
- i** Select the checkbox Look into Message body to enable message body searching.
- j** Select the checkbox Look into Attachments to enable attachment searching.
- k** Click **Save and display results** or **Save and return to list**. **Save and display results** executes your search and displays results. **Save and return to list** saves your search and returns to **Displaying All Saved Searches** search list with your newly created search added to the saved search list.

## Wizard search

A Wizard search provides predefined search fields that expand the Simple Search basic criteria, and the ability to add or remove new search conditions.

- 1** Log on as Account Admin, Search Admin, or Search Admin Plus and navigate to the Search tab to view the **Displaying All Saved Searches** page (see [Figure 50](#)).
- 2** Click the Start New Search - Wizard tab.  
Execute all steps delineated in [Simple search](#) task [step 2](#), [step a](#) through [step j](#)).

**Figure 53 Start New Search - Wizard tab - search conditions**

add new condition

To/cc/bcc Contains

remove

Save and display results or Save and return to list

- 3 Toggle the drop-down boxes and select preconfigured parameters to define a conditional search (see [Figure 53](#)).
- 4 Click the link **add new condition** to add more search conditions. Click the **remove** link to remove a search condition.

Click **Save and display results** or **Save and return to list**. **Save and display results** executes your search and displays results. **Save and return to list** saves your search and returns to **DISPLAYING ALL SAVED SEARCHES** search list with your newly created search added to the saved search list.

Again, as mentioned earlier in this chapter, you may select a unique permutation of the steps just described to fit your own unique search needs.

## Advanced search

An Advanced search features additional fields and the ability for you to enter custom criteria separated by a comma delimiter that expands upon the Simple Search basic criteria.

- 1 Log on as Account Admin, Search Admin, or Search Admin Plus and navigate to the Search tab to view the **Displaying All Saved Searches** page (see [Figure 50](#) or [Figure 56](#)).
- 2 Click Start New Search – Advanced tab.

**Figure 54 Start new search - Advanced tab - Search Options**

**Search Options**

Subject

Sender   
Full or partial email address to find messages from a specific sender.

Recipients   
Full or partial recipient addresses. All recipient types (To, CC, BCC) are searched. Separate multiple addresses with a space. Wildcards '\*' and '?' are allowed.

Has words   
Find messages with specific terms in the message body or attachments.  
Look into ☒ message body ☐ attachments

Do not have words   
You can refine the search results to messages that do not have specific terms. At least one must be checked if using this field.  
Look into ☐ message body ☐ attachments

Figure 54 displays the Advanced Search Options which are described below.

- 3 Populate the Subject field as a search parameter to search message subject fields.

---

**NOTE** To find an exact match for a Subject field search, put your Subject field search terms within double quotes.

---

- 4 Populate the Sender field as a search parameter with full or partial names (wildcard requires 5 or more characters appended).
- 5 Populate the Recipients field as a search parameter with full or partial names (wildcard requires 5 or more characters appended).
- 6 Populate the Has words field as a search parameter with full or partial words (wildcard requires 5 or more characters appended).
- 7 Select the Look into message body checkbox to enable message body searching.
- 8 Populate the Do not have words field as a search parameter with full or partial words (wildcard 5 character limit).
- 9 Select the Look into message body checkbox to enable message body searching.



- 10 Click **Save and display results** or **Save and return to list**. Save and display results executes your search and displays results. Save and return to list saves your search and returns to DISPLAYING ALL SAVED SEARCHES search list with your newly created search added to the saved search list.

Again, as mentioned earlier in this chapter, you may select a unique permutation of steps described above to fit your own unique search needs.

## Original mail client view and search results view

Your message has been archived faithfully and is unchanged from its original content. Sometimes, translating that content into different formats may cause the message to display slightly differently than how you viewed that message originally in your mail client.

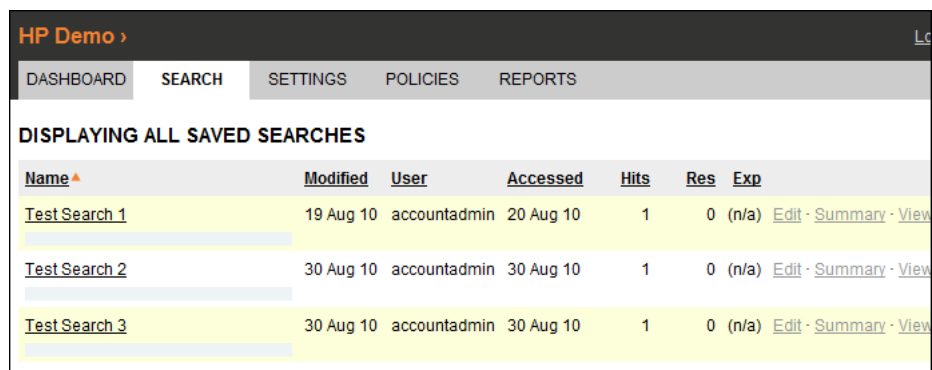
In order to view the message in the format that most closely matches the original content, download a message from a search page in MIME/RFC822 format and then view that file in your mail client.

### More details

Your view of a message in search results may not appear exactly the way it did when you received the message with your mail client, because the message is translated into HTML and browsers differ significantly in how they display HTML. Browsers differ in interpreting the standards for HTML, extensions they provide, and errors they contain. Differences between browsers are often seen for e-mail containing HTML and e-mail with content pasted from other applications, because those other applications may have used fonts that are not available on your computer. Also, some applications generate non-standard HTML that may cause problems for certain browsers. Furthermore, as a security precaution when displaying HTML content, the archiving service removes JavaScript from the message and that may affect the way the message is displayed.

## Editing a saved search

**Figure 55** Displaying all saved searches



HP Demo >							
DASHBOARD SEARCH SETTINGS POLICIES REPORTS							
DISPLAYING ALL SAVED SEARCHES							
Name ▲	Modified	User	Accessed	Hits	Res	Exp	
<a href="#">Test Search 1</a>	19 Aug 10	accountadmin	20 Aug 10	1	0	(n/a)	<a href="#">Edit</a> · <a href="#">Summary</a> · <a href="#">View</a>
<a href="#">Test Search 2</a>	30 Aug 10	accountadmin	30 Aug 10	1	0	(n/a)	<a href="#">Edit</a> · <a href="#">Summary</a> · <a href="#">View</a>
<a href="#">Test Search 3</a>	30 Aug 10	accountadmin	30 Aug 10	1	0	(n/a)	<a href="#">Edit</a> · <a href="#">Summary</a> · <a href="#">View</a>

- 1 Log on as Account Admin, Search Admin, or Search Admin Plus and navigate to the Search tab to view the **Displaying All Saved Searches** page (displayed in [Figure 55](#)).

**Figure 56 Edit Search**

HP Demo > Search Archive > Edit Search Logout | Admin | Rajan Lakshminarasimhan | Help

DASHBOARD SEARCH SETTINGS POLICIES REPORTS

**EDIT SEARCH**

Simple **Advanced**

Delete this Search

Cancel

**SEARCH EDIT**

Modify an existing search to change the scope and the results. Use the SAVE category to preserve items that may be excluded when the scope changes. All categories are dynamic except for the special SAVE tag. Delete the search if the results are no longer useful. Deleting also removes the LEGAL HOLD status from all messages previously saved. The deletion of a search also removes all exports associated to that search.

**Simple**

Use simple search to look for text in messages or attachments.

**Advanced**

Advanced allows you to find items by sender, recipient, subject, body, attachment with greater fine-tuning control. In an advanced search, there is an implied "AND" between fields and between terms in the "has words" and "doesn't have words" fields. (ex. picnic party boat would provide all emails that contain the words picnic and party and boat in the message.

Wildcards ("\*" and/or "?") are required for partial addresses (ex. "doe@acme.", johndoe" or "xyzcorp com - minimum of 5 additional characters with wildcards).

Name: Test Search 3  
Give your search a unique name.

Tags:   
Tags are optional and help to categorize searches.

Permissions:

Note:   
Describe the search with an optional note.

**Limit search within a date range**

Range: Custom   
Select a common date range or enter a custom range below.

Begins on: July 01, 2010   
Ends on: July 31, 2010

**Search terms**

Look into ☒ Message body ☐ Attachments

Save and display results or Save and return to list

- 2 From the **Displaying All Saved Searches** page, click the Edit link associated with a given saved search to view the Edit Search Simple page as displayed in [Figure 56](#).
- 3 Edit the search criteria as desired. Click **Save and display results** to save your edits, run the search, and display the results. Or click **Save and return to list** to save and return to the Search list.

## Editing advanced search criteria

You can edit search criteria on a more granular level. Click the Edit link associated with a given search. From the Edit Search page, click the Advanced tab. Refer to the [Advanced search](#) (page 85) description for more details.

## Deleting a saved search

Click **Delete this Search** if you wish to delete a saved search. A prompt displays indicating that this will permanently remove this search. Click **OK** or **Cancel**. Selecting **Cancel** returns you to the original **Displaying All Saved Searches** page.

## Viewing search summaries

- 1 Log on as Account Admin, Search Admin, or Search Admin Plus and navigate to the Search tab to view the **Displaying All Saved Searches** page (displayed in [Figure 55](#)).

**Figure 57 Search summary**

HP Demo > Search Archive > Search Summary Logout | Admin | Rajan Lakshminarasimhan | Help

DASHBOARD SEARCH SETTINGS POLICIES REPORTS

**SUMMARY FOR HP DEMO ARCHIVE SYSTEM 2010-08-31**

Search criteria for Test Search 1  
Date range 2010-07-01 through  
Search results for "" in message body

☒ Include search results in report

Search Results  
2 items matching search criteria.

☒ Include tags in report

Search Tags

Generate PDF  
Cancel

- 2 Click the Summary link associated with a given saved search to view its summary, as shown in [Figure 57](#).

## Selecting summary report options

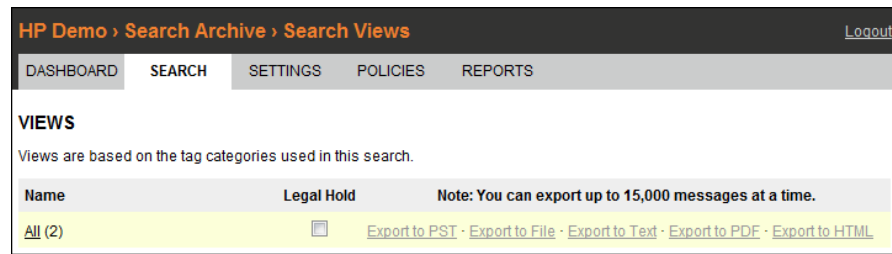
From the Search summary page, you have options for reports you can generate for search summaries. For example, you can include or not include the search results. You can also decide whether or not to include tags.

Once you have determined which options you want to include, click **Generate PDF**. Select “Open with” or “Save File” in the Opening summary.pdf dialog box, then click **OK**. View the report as a PDF file either by viewing it in Adobe Reader or Adobe Acrobat if you selected “Open with.” If you selected “Save File,” navigate to the saved file to open it.

## Viewing searches

- 1 Log on as Account Admin, Search Admin, or Search Admin Plus and navigate to the Search tab to view the **Displaying All Saved Searches** page (displayed in [Figure 55](#)).

**Figure 58 Search views**



- 2 Click the Views link associated with a given saved search to view it.

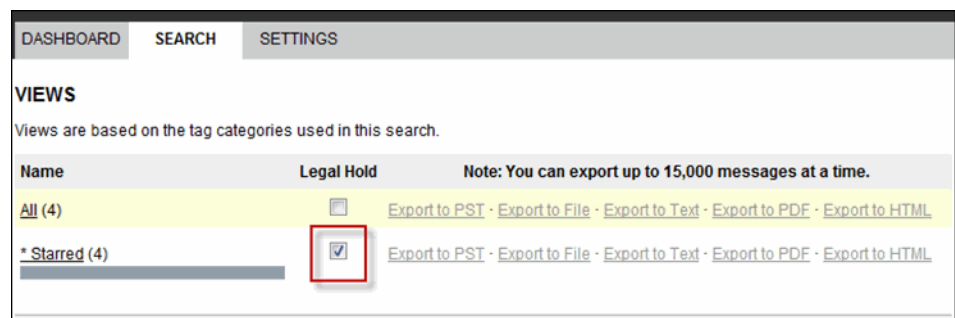
## Placing a legal hold on a search

You can place a legal hold status to all items in a given search. A legal hold will prohibit items from being removed during automatic maintenance routines. Legal holds are typically used when legal action is taking place for the pertinent searches.

Any file tagged with the legal hold attribute is not purged from the archive service system even if an automatic policy is configured to remove those items.

To place a legal hold on a search, select the corresponding **Legal Hold** checkbox. The following confirmation message displays: “The Legal Hold status was added to all messages successfully.”

**Figure 59 The legal hold status checkbox**



## Removing a legal hold

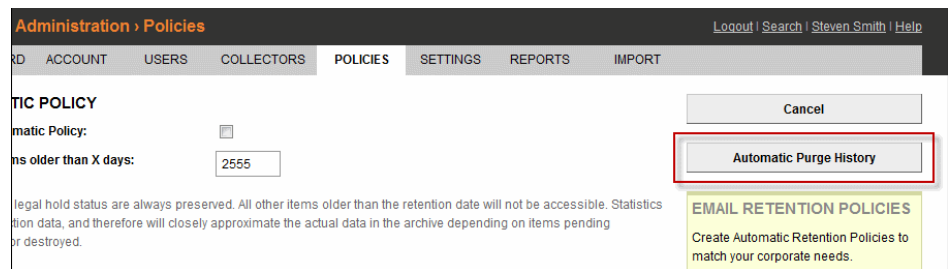
To remove the legal hold, deselect the **Legal Hold** checkbox for the relevant search. The following confirmation message displays: “The Legal Hold status was removed from all messages successfully.”

## Automatic purge history

To confirm items have been left on legal hold after the nightly purge, a Search Admin Plus or Account Owner Administrator can access the **Automatic Purge History** from the **Policies** page (Administration > Policies). See [Figure 60](#).

Click the **Details** link from the **Automatic Purge History** page to download a CSV file containing the items that have been purged or put on legal hold. The Message ID (full or partial) can be used to search against specific messages.

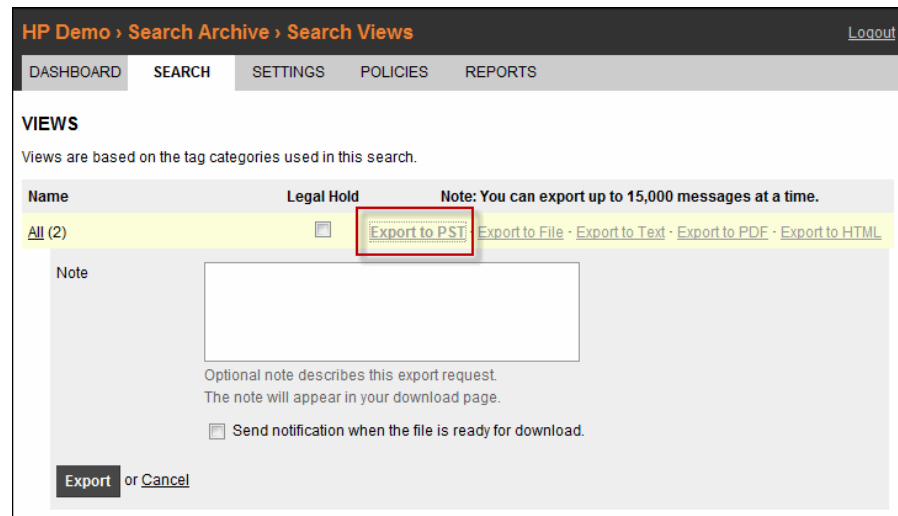
**Figure 60** Automatic Purge History button on Administration > Policies page



## Exporting search results

- 1 Log on as Account Admin, Search Admin, or Search Admin Plus and navigate to the Search tab to view the **Displaying All Saved Searches** page (displayed in [Figure 55](#)).

**Figure 61 Search - Views - Exports. Note the message “You can export up to 15,000 messages at a time.”**



- 2 Under the Name heading, click the name of the search you want to export. The search results are displayed.
  - 3 Select the button **Export My Results**. The Views page displays as shown in Figure 61. You now have the following five export options available:
    - Export to PST
    - Export to File
    - Export to Text
    - Export to PDF
    - Export to HTML
  - 4 Select the link corresponding to the export type you want; for example, “Export to PST,” as shown in Figure 61.
  - 5 Enter an optional note to yourself as an administrative reminder in the Note field.
  - 6 If you like, you can select the checkbox for “Send notification when the file is ready for download.” This option instructs the archive system to send an SMTP message to your assigned email address when this search export is ready for download.
- Otherwise, you can retrieve your export request by going to the Export page where all the exports are listed. When the Status column indicates “ready” next to your export request, click its file name to begin downloading.
- 7 Click **Export** to execute the export request, or click **Cancel** to return to the previous page without exporting. After clicking **Export**, you will return to the previous page.
  - 8 When the archive service Export email notification is received, open it and click the URL link in the message body to download your exported search.

## Auditing search activity

- 1 Log on as Account Admin, Search Admin, or Search Admin Plus and navigate to the Search tab to view the **Displaying All Saved Searches** page (displayed in [Figure 62](#)).

**Figure 62 Search – Audit**

HP Demo ›

Logout | Admin

DASHBOARD

SEARCH

SETTINGS

POLICIES

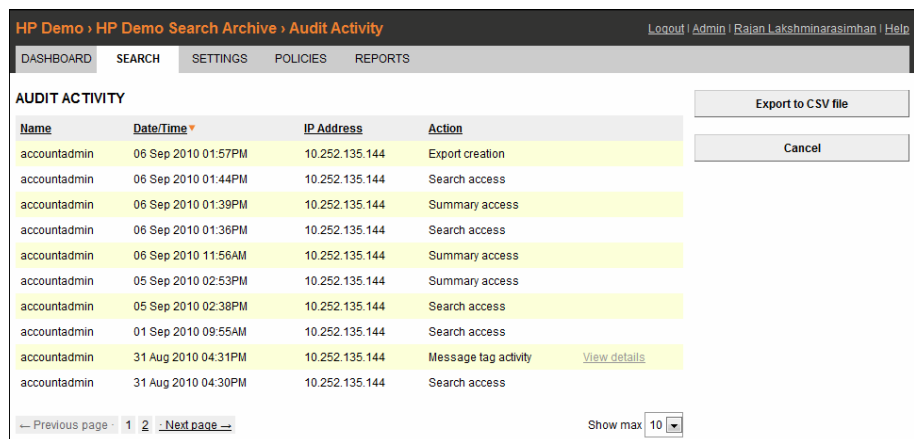
REPORTS

DISPLAYING ALL SAVED SEARCHES

Name ▲	Modified	User	Accessed	Hits	Res	Exp	
<a href="#">Test Search 1</a>	19 Aug 10	accountadmin	20 Aug 10	1	0 (n/a)	<a href="#">Edit</a> · <a href="#">Summary</a> · <a href="#">Views</a> · <a href="#">Audit</a>	
<a href="#">Test Search 2</a>	30 Aug 10	accountadmin	30 Aug 10	1	0 (n/a)	<a href="#">Edit</a> · <a href="#">Summary</a> · <a href="#">Views</a> · <a href="#">Audit</a>	
<a href="#">Test Search 3</a>	30 Aug 10	accountadmin	30 Aug 10	1	0 (n/a)	<a href="#">Edit</a> · <a href="#">Summary</a> · <a href="#">Views</a> · <a href="#">Audit</a>	

- 2 Click the Audit link associated with a given saved search. The Audit Activity page displays for your chosen search (see [Figure 63](#)).

**Figure 63 Audit Activity page**



HP Demo › HP Demo Search Archive › Audit Activity Logout | Admin | Rajan Lakshminarasimhan | Help

DASHBOARD SEARCH SETTINGS POLICIES REPORTS

**AUDIT ACTIVITY**

Name	Date/Time ▼	IP Address	Action
accountadmin	06 Sep 2010 01:57PM	10.252.135.144	Export creation
accountadmin	06 Sep 2010 01:44PM	10.252.135.144	Search access
accountadmin	06 Sep 2010 01:39PM	10.252.135.144	Summary access
accountadmin	06 Sep 2010 01:36PM	10.252.135.144	Search access
accountadmin	06 Sep 2010 11:56AM	10.252.135.144	Summary access
accountadmin	05 Sep 2010 02:53PM	10.252.135.144	Summary access
accountadmin	05 Sep 2010 02:38PM	10.252.135.144	Search access
accountadmin	01 Sep 2010 09:55AM	10.252.135.144	Search access
accountadmin	31 Aug 2010 04:31PM	10.252.135.144	Message tag activity <a href="#">View details</a>
accountadmin	31 Aug 2010 04:30PM	10.252.135.144	Search access

Export to CSV file

Cancel

Previous page: 1 2 Next page: — Show max 10

The Audit Activity page lists the name, date and time, IP address, and action for every instance that there was activity for the chosen saved search. This allows you to see how the search is being used.

Each column can be sorted in ascending or descending order.

Note also that you can export the audit activity in a CSV (comma separated value) file by clicking **Export to CSV file**. CSV files are ideal for importing into a spreadsheet.



# Working with saved search results

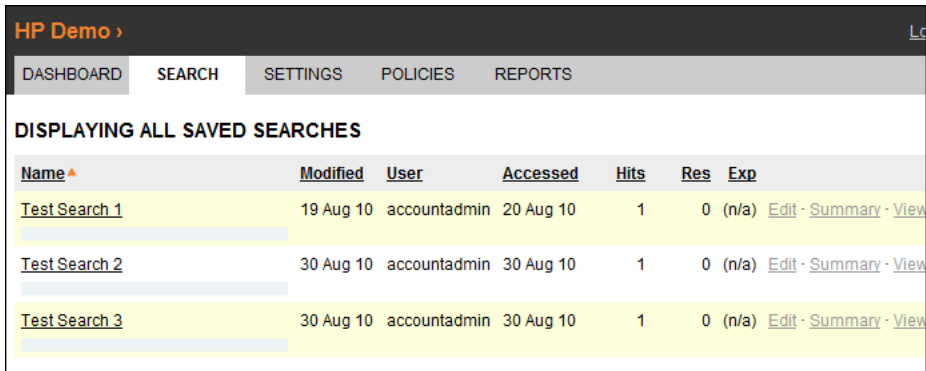
This topic lists several archive service search features and capabilities working with existing search results. The archive service is fully featured and flexible. The topics presented clearly delineate steps to leverage a given feature. Keep in mind these steps can be combined to produce multiple permutations.

This section covers the following topics:

- [How to view and parse an existing search result with more granular criteria](#)
- [How to edit an existing search to generate new results](#)
- [How to sort an existing search result](#)
- [Preconfigured tags: Save, Reviewed, Starred, Attention](#)
- [How to create search tags](#)
- [Working with search tags](#)

## How to view and parse an existing search result with more granular criteria

Figure 64 Search - Displaying All Saved Searches

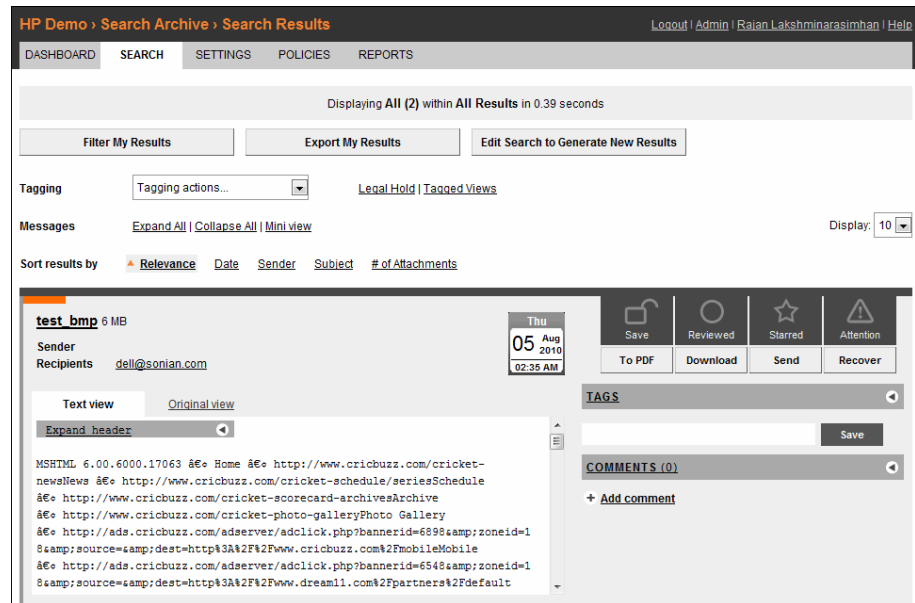


The screenshot shows the HP Demo interface with the 'SEARCH' tab selected. The page title is 'DISPLAYING ALL SAVED SEARCHES'. Below the title is a table with columns: Name, Modified, User, Accessed, Hits, Res, and Exp. There are three rows of saved searches, each with a link to 'Edit', 'Summary', and 'View'.

HP Demo						
DASHBOARD SEARCH SETTINGS POLICIES REPORTS						
DISPLAYING ALL SAVED SEARCHES						
Name	Modified	User	Accessed	Hits	Res	Exp
Test Search 1	19 Aug 10	accountadmin	20 Aug 10	1	0	(n/a)
Test Search 2	30 Aug 10	accountadmin	30 Aug 10	1	0	(n/a)
Test Search 3	30 Aug 10	accountadmin	30 Aug 10	1	0	(n/a)

- 1 Log on as Account Admin, Search Admin, or Search Admin Plus and select the Search tab to view the **Displaying All Saved Searches** page, shown in [Figure 64](#).

**Figure 65 Search UI displaying a given saved search result**



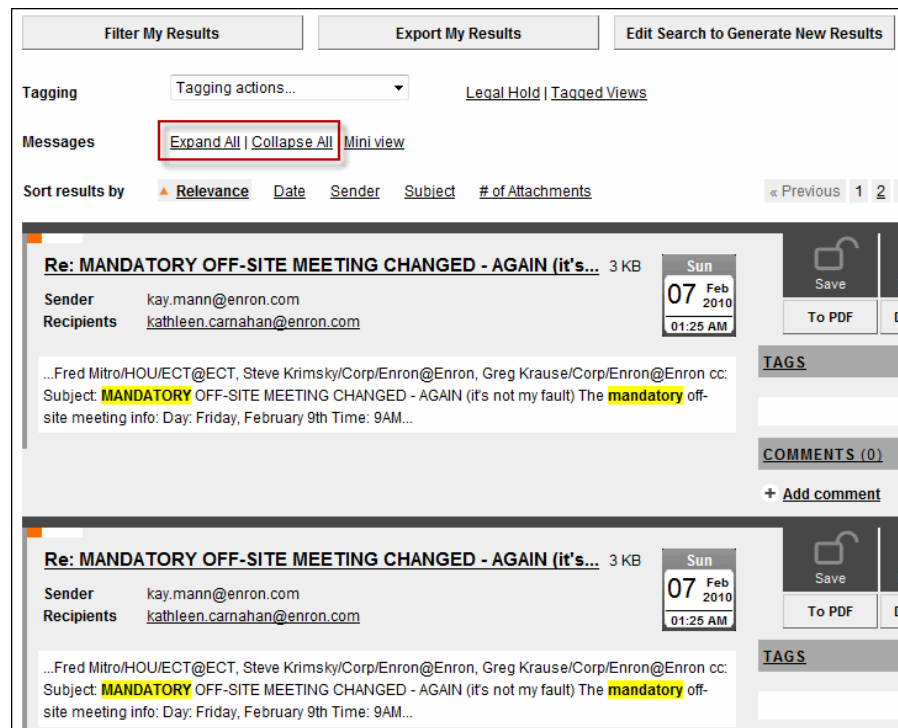
- 2 Click a given Search name to open search result set, as shown in [Figure 65](#). This default saved Search UI is the normal view and displays SMTP header and SMTP body text for each archived message contained in the search result.
  - a Click Expand All to display 'Text View'. Text View displays SMTP message header and body content with the option to Expand the header.
  - b Click Original View to display original SMTP body content as rendered by email clients.
  - c Click Collapse All to return to brief display of information for each item.
  - d Click Mini view to display SMTP message header content only.

### Expand All and Collapse All options are present only with snippet view

The **Expand All** and **Collapse All** options are present only when the search results are displaying in snippet view. Snippet view is when you enter a search term or phrase that is found and highlighted within the search results.

To see a snippet view, enter a search term or phrase in the **Search terms** box of the New Search or Edit Search page. Click **Save and display results**. If the search terms are found, they will be highlighted in the search results. This is snippet view. Note the presence of **Expand All** and **Collapse All** in [Figure 66](#).

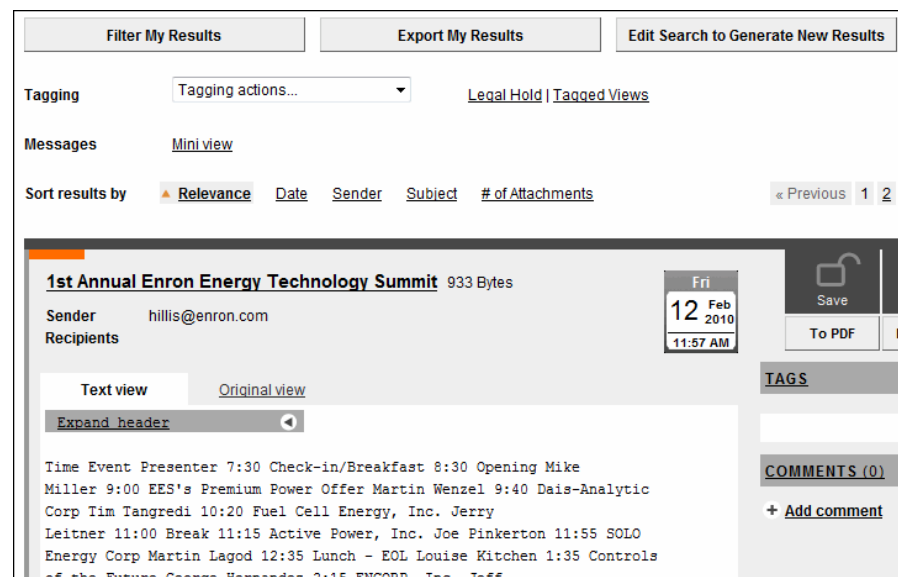
**Figure 66 Expand All and Collapse All available with snippet view**



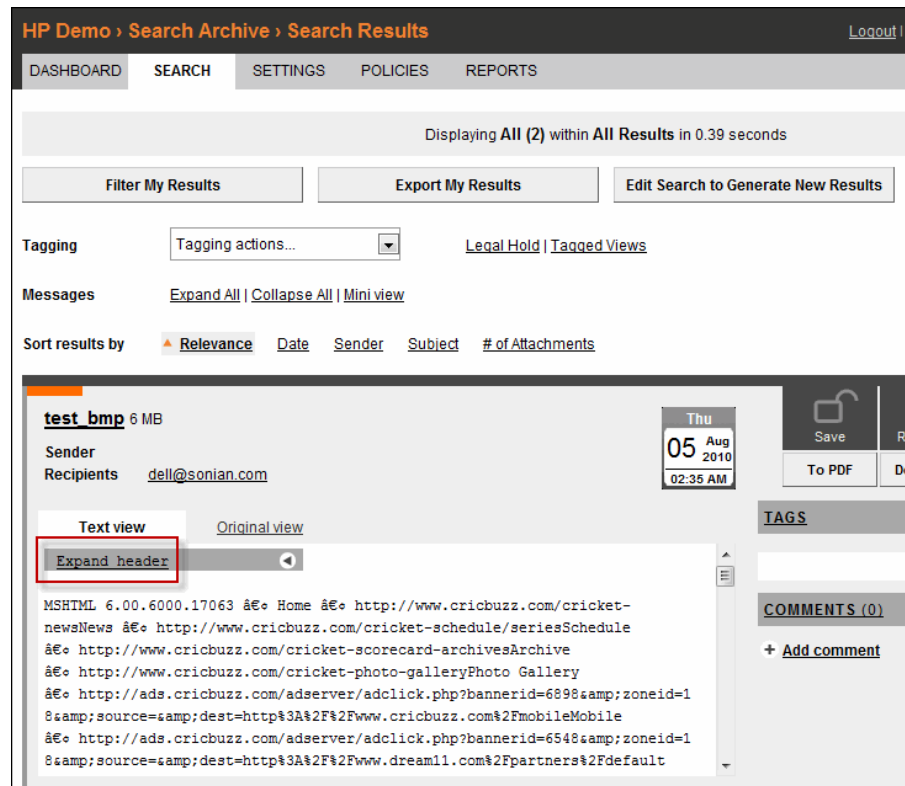
**Collapse All** reduces the size of each search result item. **Expand All** shows a larger view of each search result.

In contrast, when a more general search is done without search terms entered in the Search terms box, there will not be a snippet view, and **Expand All** and **Collapse All** do not appear on the search results page, as shown in Figure 67.

**Figure 67 No snippet view and Expand All and Collapse All are not present**

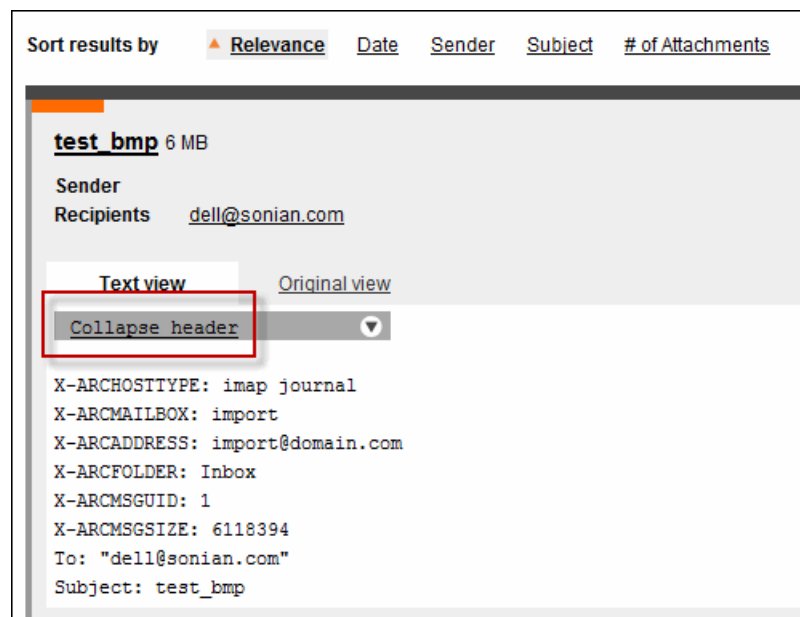


**Figure 68 Expand Extra Headers**



- e If you wish to view more SMTP header information, click **Expand header** shown in Figure 68. Figure 69 shows the expanded SMTP header details including X-Arc\* headers. X-Arc\* type message headers are created by the archive service.

**Figure 69 Expanded SMTP header details including X-Arc\* headers created by the archive service**



**Figure 70 Find in Results UI**

The screenshot displays the 'HP Demo > Search Archive > Search Results' interface. At the top, there is a navigation bar with links for 'Logout', 'Admin', 'Rajan Lakshminarasimhan', and 'Help'. Below this is a secondary navigation bar with tabs for 'DASHBOARD', 'SEARCH', 'SETTINGS', 'POLICIES', and 'REPORTS'. The main content area shows a status message: 'Displaying All (2) within All Results in 0.46 seconds'. The 'Find in Results' section is divided into three main filter categories: 'Date range', 'Sender and recipients', and 'Body and attachments'. The 'Date range' section includes 'Begins on' and 'Ends on' date pickers, with a 'Clear dates' link. The 'Sender and recipients' section has input fields for 'Sender' and 'Recipients (To, cc and bcc)'. The 'Body and attachments' section includes a 'Subject' input field, a 'Has words' text area, and checkboxes for 'Message Body' and 'Attachments'. Below these is a 'Does not have words' section with another text area and checkboxes for 'Message Body' and 'Attachments'. At the bottom left of the filter section, there are 'Find' and 'Cancel' buttons.

- 3 Click **Filter My Result** to display the Find in Results page as shown in [Figure 70](#).
- 4 Populate the Find in Results page with your criteria to refine and parse search results with iterations of:
  - a Enter Date range values using calendar applet.
  - b Enter Sender and Recipient email alias values.
  - c Enter body and attachments Subject/Has words/Message/Attachments/ Does not have words criteria.
  - d Click Find.
  - e Review results returned.

## How to sort an existing search result

**Figure 72 Search UI displaying a given saved search result**

HP Demo | Search Archive | Search Results

[Logout](#) | [Admin](#) | [Rajan Lakshminarasimhan](#) | [Help](#)

DASHBOARD

SEARCH

SETTINGS

POLICIES

REPORTS

Displaying All (2) within All Results in 0.39 seconds

Filter My Results

Export My Results

Edit Search to Generate New Results

Tagging

Tagging actions...

Legal Hold | Tagged Views

Messages

Expand All | Collapse All | Mini View

Display: 10

Sort results by

Relevance

Date

Sender

Subject

# of Attachments

test.bmp 6 MB

Thu 05 Aug 2010 02:35 AM

Save

Reviewed

Starred

Attention

To PDF

Download

Send

Recover

TAGS

Sender

Recipients

Text view

Original view

Expand header

```

MSHTML 6.00.6000.17063 &#x000A; Home &#x000A; http://www.cricbuzz.com/cricket-news&#x000A; http://www.cricbuzz.com/cricket-schedule/seriesSchedule&#x000A; http://www.cricbuzz.com/cricket-scorecard-archivesArchive&#x000A; http://www.cricbuzz.com/cricket-photo-galleryPhoto Gallery&#x000A; http://ads.cricbuzz.com/adserver/adclick.php?bannerid=6898&amp;zoned=1&amp;source=&amp;dest=http%3A%2F%2Fwww.cricbuzz.com%2FmobileMobile&#x000A; http://ads.cricbuzz.com/adserver/adclick.php?bannerid=6548&amp;zoned=1&amp;source=&amp;dest=http%3A%2F%2Fwww.dream11.com%2Fpartners%2Fdefault

```

COMMENTS (0)

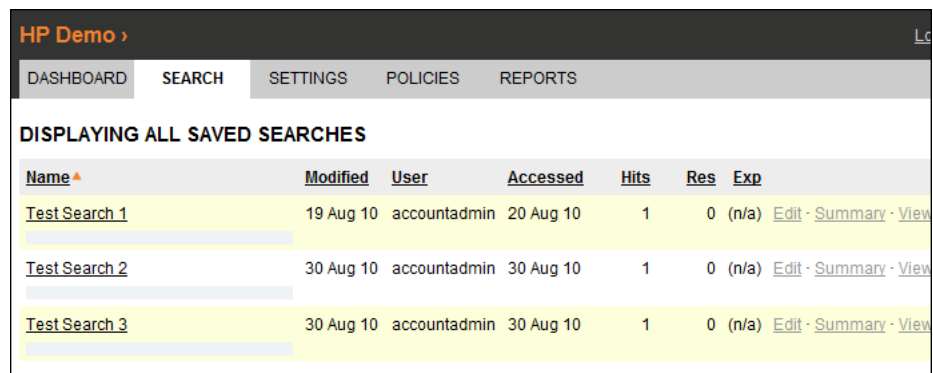
+ Add comment

- Click a given Search name to open search result set, as shown in [Figure 72](#).
- Click **Edit Search to Generate New Results**. Your archive service displays Edit Search UI. Please refer to [Simple search](#) (page 83) and [Advanced search](#) (page 85) to execute your choice of edits and generate new results.

- 2 Click a given Search name to open search result set, as shown in [Figure 72](#). This default saved Search UI is the normal view and displays SMTP header and SMTP body text for each archived message contained in the search result.
- 3 Next to **Sort results by**, select one of the following links according to how you want to sort the search results:
  - a Relevance
  - b Date
  - c Sender
  - d Subject
  - e # of Attachments

## Preconfigured tags: Save, Reviewed, Starred, Attention

**Figure 73 Search - Displaying All Saved Searches**

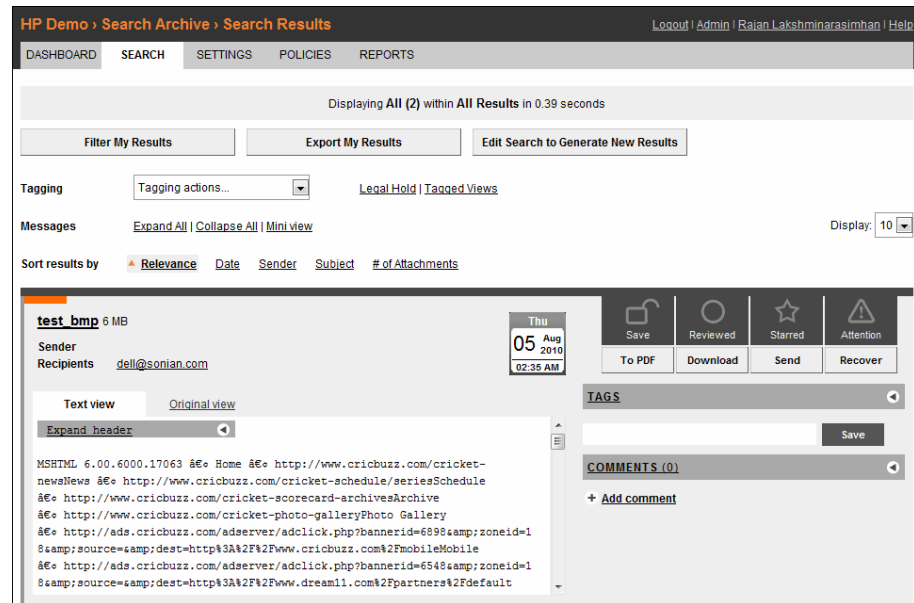


The screenshot shows the HP Demo Search interface. At the top, there is a navigation bar with tabs: DASHBOARD, SEARCH (selected), SETTINGS, POLICIES, and REPORTS. Below the navigation bar, the title "DISPLAYING ALL SAVED SEARCHES" is displayed. A table lists three saved searches: Test Search 1, Test Search 2, and Test Search 3. Each row includes columns for Name, Modified, User, Accessed, Hits, Res, and Exp. The table also includes links for Edit, Summary, and View for each search.

Name	Modified	User	Accessed	Hits	Res	Exp
<a href="#">Test Search 1</a>	19 Aug 10	accountadmin	20 Aug 10	1	0	(n/a) <a href="#">Edit</a> · <a href="#">Summary</a> · <a href="#">View</a>
<a href="#">Test Search 2</a>	30 Aug 10	accountadmin	30 Aug 10	1	0	(n/a) <a href="#">Edit</a> · <a href="#">Summary</a> · <a href="#">View</a>
<a href="#">Test Search 3</a>	30 Aug 10	accountadmin	30 Aug 10	1	0	(n/a) <a href="#">Edit</a> · <a href="#">Summary</a> · <a href="#">View</a>

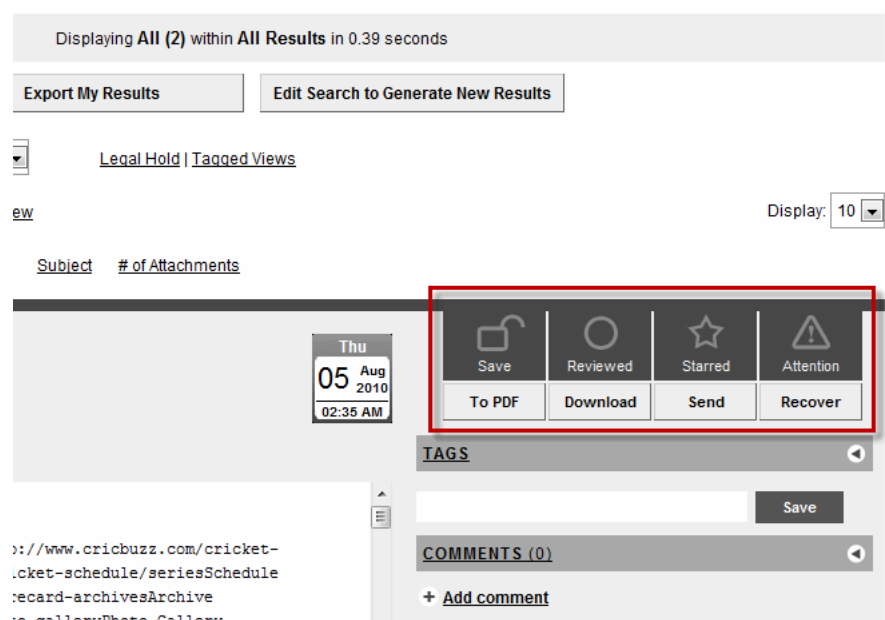
- 1 Log on as Account Admin, Search Admin, or Search Admin Plus and navigate to the Search tab. The Displaying All Saved Searches page displays, shown in [Figure 73](#).

**Figure 74 Search UI displaying a given saved search result**



2 Click a given Search name to open search result set, as shown in [Figure 74](#).

**Figure 75 Preconfigured TAGS: Save, Reviewed, Starred, Attention**



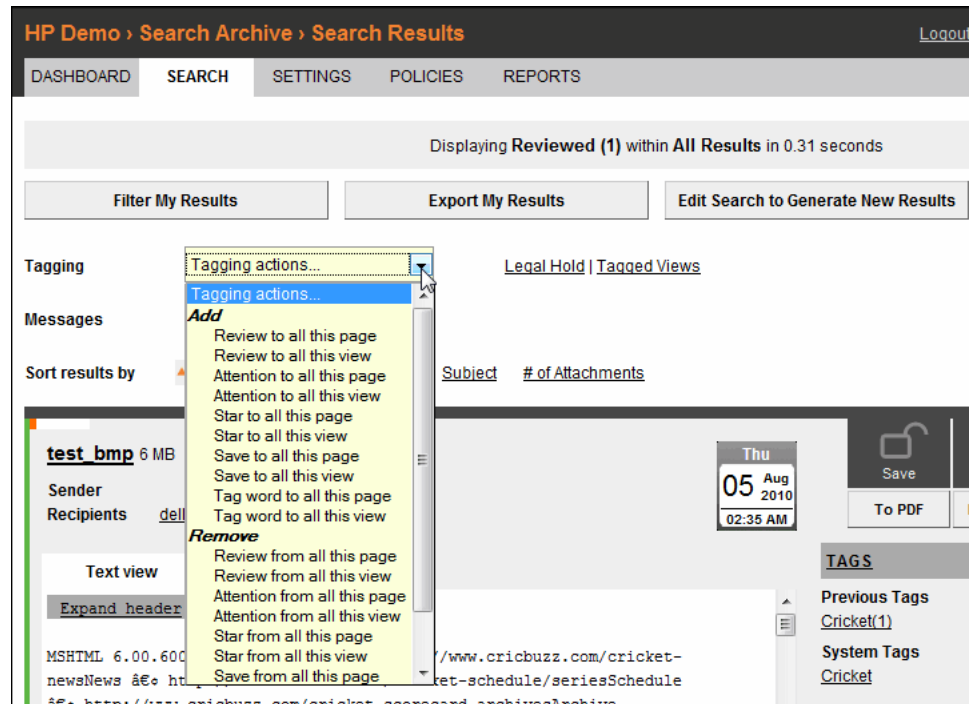
- 3 Click Save, Reviewed, Starred and/or Attention to apply predefined tags to search result (see [Figure 75](#)).
- 4 Click 'To PDF' to download PDF of search result message and attachment file names sent.
- 5 Click Download to download search result message in MIME/RFC82 format.
- 6 Click Send to forward search results to email recipient as attachment.



- 7 Click Recover to send message to recover in user active mailbox.
- 8 Click Tags link to view system wide tags, apply, and save.

The archive service is very flexible and another option to leverage is to apply a tagging option to result set displayed in your given Search UI with 'Tagging' dropdown field to apply a tagging action.

**Figure 76 Tagging actions dropdown options**

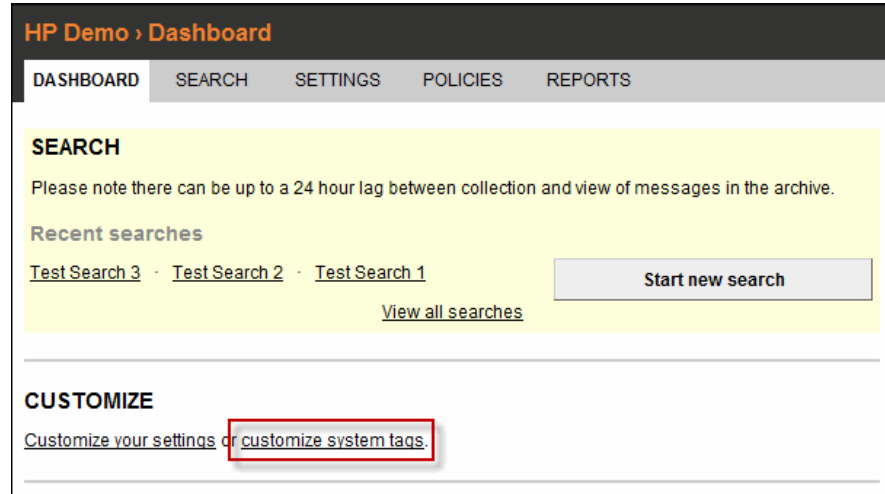


- 9 Click the **Tagging** field dropdown box and select **Add** or **Remove** (see Figure 76).
  - Review to all this page
  - Review to all this view
  - Attention to all this page
  - Attention to all this view
  - Star to all this page
  - Star to all this view
  - Save to all this page
  - Save to all this view
  - Tag word to all this page
  - Tag word to all this view

## How to create search tags

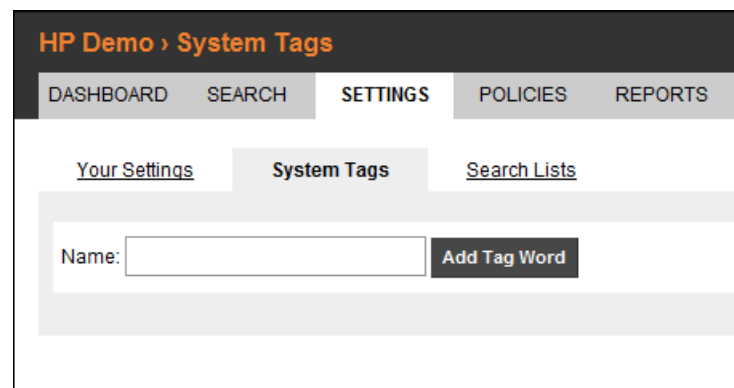
A tag is an online industry standard term used to label data such as a file or image. The archive service system features tags as terms or keywords attached to email archived metadata. You can create and use a tag to quickly categorize and browse your email archive to find archived messages. You can even add a tag to an individual message. For example, in [Figure 75](#) you may add a tag in the TAGS field shown to the right of the message body to uniquely tag that message.

**Figure 77 Customize system tags from Dashboard**



- 1 Two options to create archive system tags from initial logon or non-Search UI are displayed in [Figure 77](#) and [Figure 78](#):
  - a Log on as Account Admin, Search Admin, or Search Admin Plus to your archive system default Dashboard and click **customize system tags**.
  - b If already logged in select Search link and select Search tab - **System tags**.

**Figure 78 Add Tag Word from Settings > System Tags**



- 2 Populate the Name field by entering your new, custom, system-wide tag and click **Add Tag Word**. Your newly-created system tag is displayed under Name. Click a delete link next to a given tag name to delete.

## Working with search tags

**Figure 79 Search - Displaying All Saved Searches - Tags**

The screenshot shows the 'HP Demo Search Archive' interface. At the top, there's a navigation bar with 'DASHBOARD', 'SEARCH', 'SETTINGS', 'POLICIES', and 'REPORTS'. Below this, a section titled 'DISPLAYING ALL SAVED SEARCHES' contains a table with columns: Name, Modified, User, Accessed, Hits, Res, and Exp. The table lists three searches: 'Test Search 1', 'Test Search 2', and 'Test Search 3'. To the right of the table is a 'TAGS' pane with a red border. It contains links for 'View as list' and 'View as cloud', and a summary '\* All (3)'.

Name	Modified	User	Accessed	Hits	Res	Exp
Test Search 1	31 Aug 10	accountadmin	31 Aug 10	2	0 (n/a)	<a href="#">Edit</a> · <a href="#">Summary</a> · <a href="#">Views</a> · <a href="#">Audit</a>
Test Search 2	30 Aug 10	accountadmin	30 Aug 10	1	0 (n/a)	<a href="#">Edit</a> · <a href="#">Summary</a> · <a href="#">Views</a> · <a href="#">Audit</a>
Test Search 3	30 Aug 10	accountadmin	30 Aug 10	1	0 (n/a)	<a href="#">Edit</a> · <a href="#">Summary</a> · <a href="#">Views</a> · <a href="#">Audit</a>

- 1 Log on as Account Admin, Search Admin, or Search Admin Plus and navigate to the Search tab. The Displaying All Saved Searches page displays. The TAGS pane is displayed in the upper right hand corner as shown in Figure 79.
- 2 Click View as list to view linear list. Click 'View as cloud' to view tag cloud.

**Figure 80 Search - select specific Tag**

The screenshot shows the 'HP Demo Search Archive' interface. At the top, there's a navigation bar with 'DASHBOARD', 'SEARCH', 'SETTINGS', 'POLICIES', and 'REPORTS'. Below this, a section titled 'DISPLAYING ALL STANFORD SEARCHES' contains a table with columns: Name, Modified, User, Accessed, Hits, Res, and Exp. The table lists one search: 'Stanford Freedom Speech'. To the right of the table is a 'TAGS' pane with a red border. It contains links for 'View as list' and 'View as cloud', and a summary '\* All (8)'. Below the summary, there's a list of tags, with 'Stanford (1)' highlighted in a red box.

Name	Modified	User	Accessed	Hits	Res	Exp
Stanford Freedom Speech	03 Feb 10	mary	08 Jun 10	0	0 (n/a)	<a href="#">Edit</a> · <a href="#">Summary</a> · <a href="#">Views</a> · <a href="#">Audit</a>

- 3 Click a previously defined TAGS link (as shown in Figure 80) to view all saved search results with that tag. This example displays all saved searches assigned 'Stanford' tag, for example, Stanford Freedom Speech.



## On-premise email server platforms

The archive service currently supports two Collector object types: IMAP and SMTP. This is true for Microsoft Exchange 2003, 2007, and 2010 for on-premise email servers.

## Hosted email platforms

The archive service supports Google Apps E-Mail, but limited to individual mailbox collections. IMAP journaling is not supported. Collection through SMTP is limited without third-party routing of outbound internet email.

## Email client integration

Microsoft Outlook 2003 and 2007 are supported. Both have the ability to access the search functionality of the archive system through the email client.

## Supported web browsers

- Internet Explorer 7.x
- Internet Explorer 8.x
- Firefox 3 and above
- Safari 4
- Safari 5

Both the 32- and 64-bit versions of the browsers are supported as applicable.



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