SCRIPT
LOGIC

E-Mail Archive

User Guide

E-MAIL ARCHIVE

- County E-mail is a public record.

- Alexander County is now Archiving all inbound and outbound e-mail.

- This has become necessary to comply with existing Public Record Laws and for the legal protection of Alexander County.

- E-mail will be **Archived** per retention policy that is being developed (projected time will be 5 years).

- Users will have access to these Archive Messages through Archive Manager software.

- Archive Manager will also help user's who regularly reach the quota limit in there mailboxes.

E-MAIL ARCHIVE (cont.)

Currently Users have <u>200MB</u> of e-mail storage.

At <u>150MB</u> users would receive a message about being over quota.

At <u>175MB</u> users were prohibited in sending any e-mails.

At <u>200MB</u> users could not receive any e-mails.

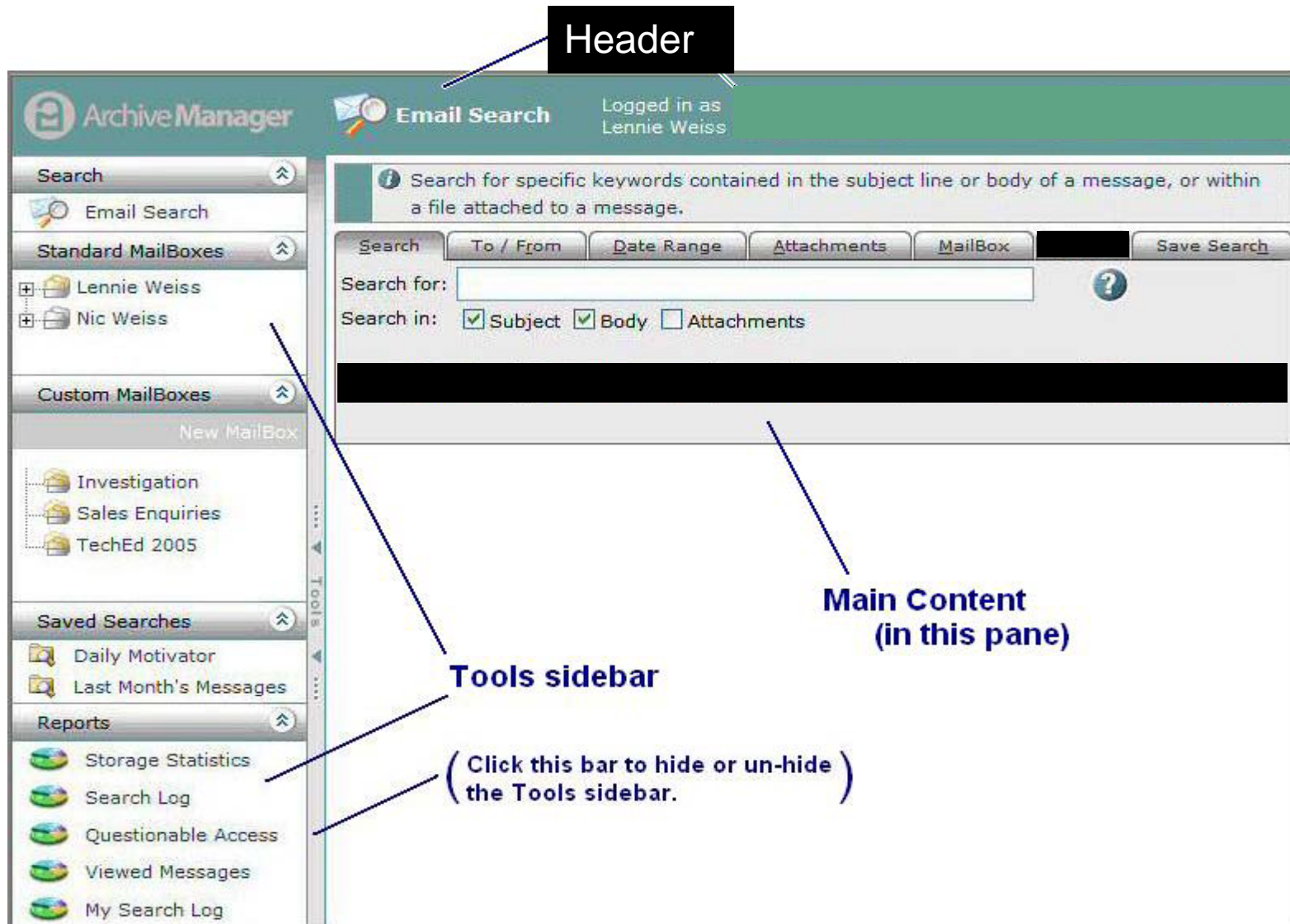Also some users are ***<u>Archiving E-mail on their local machines</u>**.

***<u>Problems and issues of this type of Archiving:</u>**

- Potential e-mail data lost from computer failure.
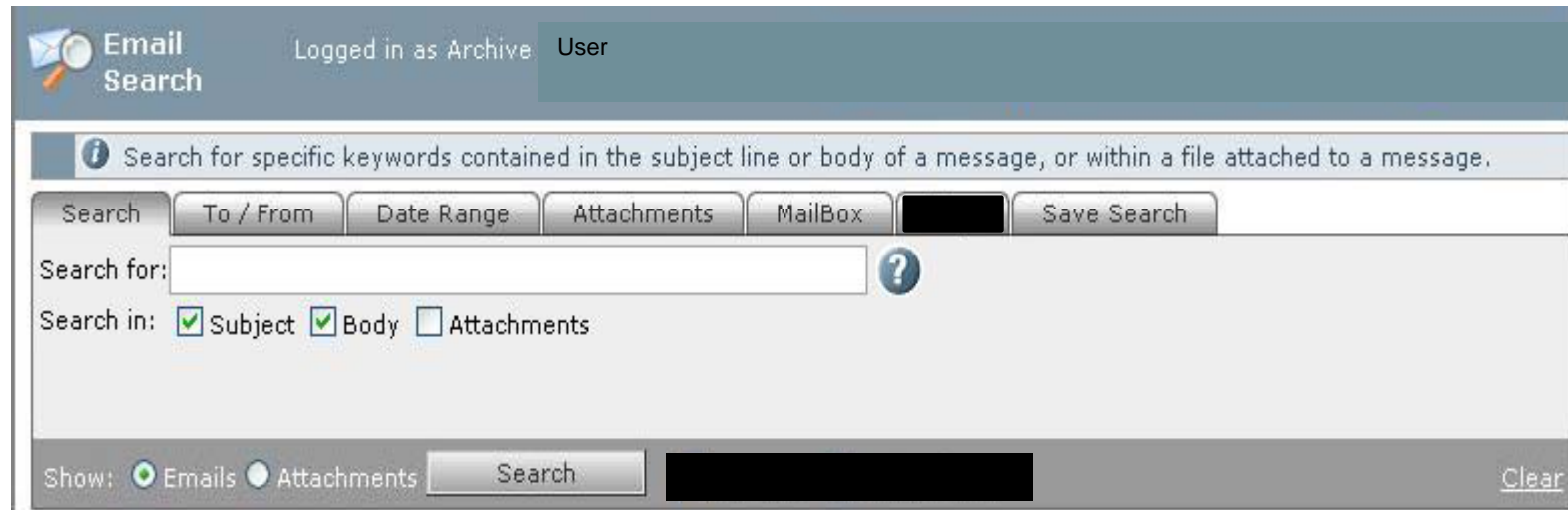- Difficult for the IT staff to move.
- E-mail not backed up, etc.

E-Mail Archive (cont.)

• New users will have access to all e-mails in one place which is regularly backed up.

• We will also be implementing an e-mail stripping policy to reduce the size of the users e-mail boxes.

• All e-mail over 6 months old will be removed from the users **Inbox** and **Sub- folders**.

• Users can still access removed e-mail through **Archive Manager**.

• Attachments will be removed after 30 days and stored in **Archive Manager**.

• E-mails with attachments 6 months old will still look the same in Outlook, however, when you click on the attachment it will be pulled from the **Archive Manager**.

Archive Manager's main screen display appears when you log in:

Header

Tools sidebar

Main Content
(in this pane)

(Click this bar to hide or un-hide)
  the Tools sidebar.

Email Search Form

A search can be in a combination of requested information entered on one or more tabbed panels: **Search (for a text string), To/From, Date Range, Attachments, and MailBox.**

A search is executed by clicking the **<u>Search button</u>** that appears below the tabbed panels.

Searching Emails vs. Attachments

Because both email messages and attachments to messages are indexed, **Archive Manager** lets you search for either messages or attachments. The choice is determined by your selection of a radio button, to the left of the **Search** button:

• Show **Emails: Sets the Search feature to search only the message** bodies and subject lines of emails that meet the criteria specified in the tabbed panels.

• Show **Attachments: Sets the Search feature to search only in** message attachments that meet the criteria specified in the tabbed panels.

You can use the same search criteria to search either email messages or attachments, and then search the other type without having to re-enter the criteria.

Using Search in Archive Manager

To perform a search:

- 1. Define search criteria in one or more of the tabbed panels
- 2. Choose whether you want to Show **Emails or Show Attachments in the search results:**

  - **Click a radio button below the tabbed panels to indicate your choice.**

- 3. Click the **Search button to execute the search.**

Viewing Search Results:

- Messages matching your search criteria will be displayed and an Archive Manager information panel will indicate what search criteria have been used.

- **(Please note that Archive Manager returns only the top 5000 results).**

Using Search (cont.)

Within Search results:

- Column widths can be resized by dragging the boundary on the right side of the column heading until the column is the width you want.

- Messages can be sorted by clicking once on the title of the column by which you want to sort.

- To preview a message, click the **Preview tab** on the right side of the screen. **With the preview screen open, the only columns visible are Importance, Icons, Attachments, and Subject. The first message in the list of search results is displayed by default. Click another message to display it in the preview pane.**

- To close the message preview, click the **Preview tab.**

Working with Messages:

Once you have located a message within **Archive Manager**, there are several options available to you.

You can **view**, **forward**, or **reply to a message**, or **send a message** to the email address associated with your login.

Using Search (cont.)

View Message :

To <u>view a message</u> you have found using the Email Search tools:

Double-click the message (to open and View Message).

       – OR –

Right-click the message and select <u>View Message</u> from the menu.

Search Controls

Tabbed Panels for Search Criteria

The criteria for different types of searches are defined on different tabbed panels within the Search form:

• **Search: Simple text-based searching.**

• **To/From: Search for messages that have been sent to or received** from a particular person or persons.
(Note: The To/From tab is visible only if the user has Person Search permission.)

• **Date Range: Search for messages received on a specific date or** between specific dates.

• **Attachments: Search for email messages containing a specific** attachment or for the attachment itself.
Lets you specify the File Name, Size and Type.

# The initial message screen displays the following information

• **From: Whom the message is from.**

• **To: The persons to whom the message was addressed.**

• **CC: Any persons copied on the message.**

• **Subject: The subject of the message.**

• **Sent: The date and time that the message was sent, based on the computer clock on the sender's computer.**
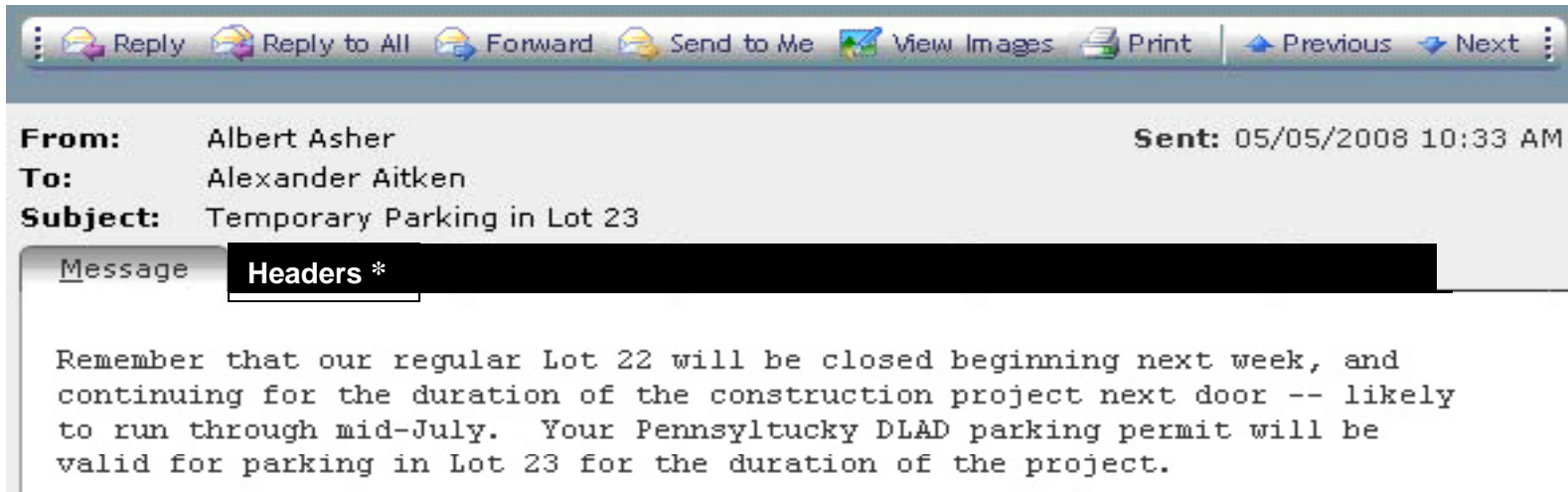
Headers
Message headers provide a list of technical details, such as the message ID, who it came from, the date and the thread index. These details can be useful for identifying problems with email or identifying sources of unsolicited commercial email messages.

To Print an E-Mail
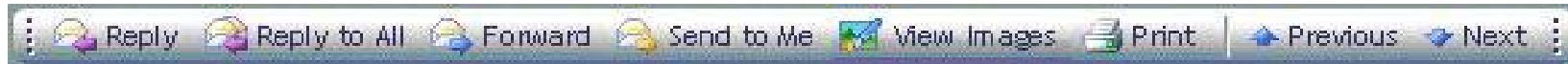
Highlight the e-mail message then **double click** to open in a new window. Click the **printer icon** on the **Toolbar** as shown above to print the message.

OR

The e-mail message can also be printed by **right clicking** in any part of the **Highlighted** area using your mouse for a menu, then go to **Print Message**.

Without opening the e-mail message all the way you will be able to print the message.

WildCard Searches Using (*) :

Archive Manager supports **wildcard searches** with an **asterisk (*) character**. An **asterisk(*) stands for <u>zero</u> (0)** or more unspecified characters, and can occur in the middle or at the end of a search string. Any other symbols are recognized in a search only the asterisk (*) character.

For example:

To search for a person(s) that sent you an e-mail place the last name (Doe*) with the asterisk at the end of their name. Their name should be placed in the **From:** search to locate the e-mail. Below are other examples:

- **test*:** will find and return **"test"** and **"tests"** and **"testing"** and **"testimonial"**
- **te*n:** will find and return **"ten"** and **"teen"** and **"tern"** and **"television"** and **"temptation".**

An **(*) asterisk** may not occur as the first character of a search string.

- All or part of an email address may be used (for example: **fred.jones@domain.com or *@domain.com).**
- All or part of a display name may also be used (for example: **John Smith or *Smith).**

Toolbar
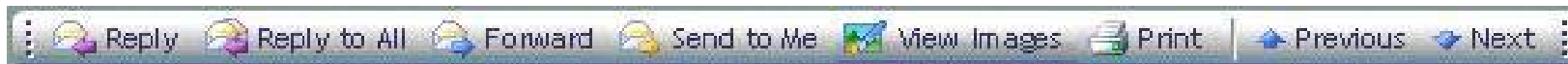
Archive Manager provides a set of email client functionalities similar to what you have been using with your regular e-mail.

The Toolbar shown above allows you to work with a message after it has been located in the Archive Manager database.

The Toolbar is displayed at the top of the message window as shown. Use the toolbar buttons to perform any of the following tasks:

• **Reply: Reply to the sender of the message.**

• **Reply to All: Reply to the sender and all other addressee(s) of the** message.

• **Forward: Forward the message to the addressee(s) you specify.**

• **Send to Me: Send the message to the email address associated with** your login.

• **View Images: Display any linked images in the message that may** have been suppressed by Archive Manager. This button is visible only for HTML messages, not for text messages.

• **Print: Print the message using the standard browser printing** functionality.

• **Tags: Displays any tags associated with the message and lets you** define tags for the message. Exact values will depend on how Archive Manager has been configured, but tags can be used to associate

messages with particular projects or job codes, for example.

• **Previous: Moves to the previous message (up) in the page of your**

current set of search results.

• **Next: Moves to the next message (down) in the page of your current** set of search results.

Preview Pane
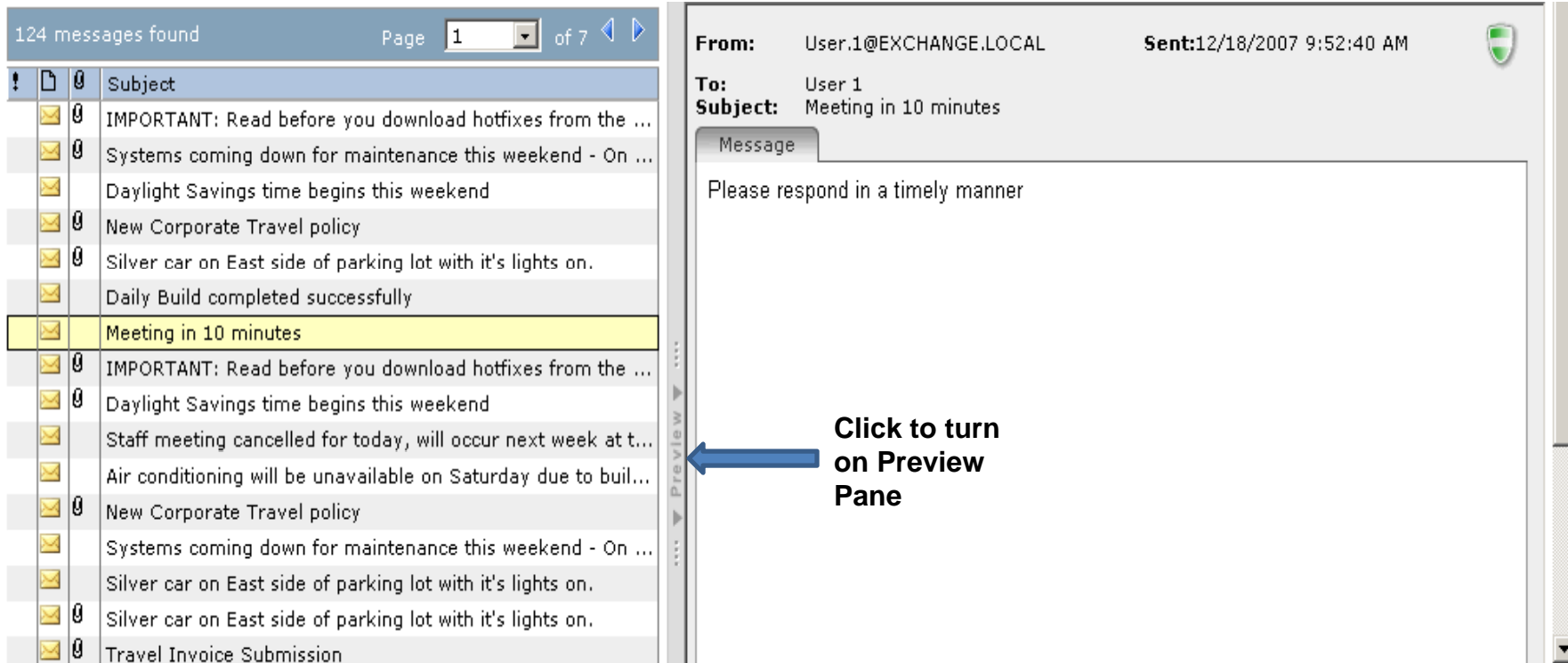
The **Preview Pane lets you preview an item without opening it. The Preview Pane, on the right side of the screen, displays the body of the message that is highlighted in the list on the left side of the screen.**

*To turn on the Preview Pane * :*

• **Click** the **Preview bar on the right side of the Archive Manager screen.***

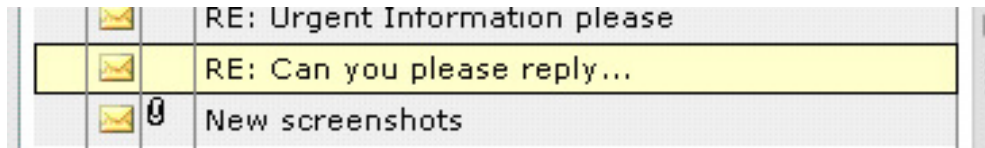*To turn off the Preview Pane * :*

• Click the **Preview bar on the left side of the preview pane.***

To display a message in the Preview Pane

1. Locate a message to display using the Email Search tools.
2. With the **Preview Pane turned on, click the message as shown below.**

To view a message, simply select it in the list, and its content will be displayed in the preview pane.

You can change the position of the preview pane or turn it off using the **View | Reading Pane menu in the Archive Manager Find dialog.**
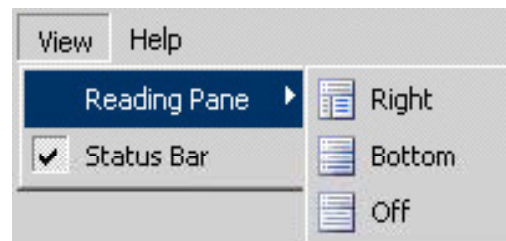
This concludes our Presentation on the E-Mail Manager.