

Symantec Enterprise Vault™

Guide for Microsoft Outlook 2010 Users

9.0



Symantec Enterprise Vault: Guide for Microsoft Outlook 2010 Users

The software described in this book is furnished under a license agreement and may be used only in accordance with the terms of the agreement.

Last updated: October 24, 2010.

Legal Notice

Copyright © 2010 Symantec Corporation. All rights reserved.

Symantec, the Symantec Logo, Veritas, Enterprise Vault, Compliance Accelerator, and Discovery Accelerator are trademarks or registered trademarks of Symantec Corporation or its affiliates in the U.S. and other countries. Other names may be trademarks of their respective owners.

This Symantec product may contain third party software for which Symantec is required to provide attribution to the third party ("Third Party Programs"). Some of the Third Party Programs are available under open source or free software licenses. The License Agreement accompanying the Software does not alter any rights or obligations you may have under those open source or free software licenses. Please see the *Third Party Software* file accompanying this Symantec product for more information on the Third Party Programs.

The product described in this document is distributed under licenses restricting its use, copying, distribution, and decompilation/reverse engineering. No part of this document may be reproduced in any form by any means without prior written authorization of Symantec Corporation and its licensors, if any.

THE DOCUMENTATION IS PROVIDED "AS IS" AND ALL EXPRESS OR IMPLIED CONDITIONS, REPRESENTATIONS AND WARRANTIES, INCLUDING ANY IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR NON-INFRINGEMENT, ARE DISCLAIMED, EXCEPT TO THE EXTENT THAT SUCH DISCLAIMERS ARE HELD TO BE LEGALLY INVALID. SYMANTEC CORPORATION SHALL NOT BE LIABLE FOR INCIDENTAL OR CONSEQUENTIAL DAMAGES IN CONNECTION WITH THE FURNISHING, PERFORMANCE, OR USE OF THIS DOCUMENTATION. THE INFORMATION CONTAINED IN THIS DOCUMENTATION IS SUBJECT TO CHANGE WITHOUT NOTICE.

The Licensed Software and Documentation are deemed to be commercial computer software as defined in FAR 12.212 and subject to restricted rights as defined in FAR Section 52.227-19 "Commercial Computer Software - Restricted Rights" and DFARS 227.7202, "Rights in Commercial Computer Software or Commercial Computer Software Documentation", as applicable, and any successor regulations. Any use, modification, reproduction release, performance, display or disclosure of the Licensed Software and Documentation by the U.S. Government shall be solely in accordance with the terms of this Agreement.

Symantec Corporation
350 Ellis Street, Mountain View, CA 94043

<http://www.symantec.com>

Contents

| | | |
|-----------|--|----|
| Chapter 1 | Introducing Symantec Enterprise Vault | 5 |
| | About Enterprise Vault | 5 |
| | About Vault Cache | 6 |
| | About Virtual Vault | 7 |
| | About working offline | 8 |
| | How Enterprise Vault selects items to archive | 9 |
| | About the retention period for archived items | 10 |
| | About Enterprise Vault and Outlook conversations | 10 |
| Chapter 2 | Setting up Enterprise Vault | 11 |
| | Installing Enterprise Vault | 11 |
| | About setting up Enterprise Vault | 12 |
| | Setting up a Vault Cache and Virtual Vault | 12 |
| | Showing or hiding your Virtual Vault | 13 |
| | Turning off Outlook AutoArchive | 14 |
| | Configuring Windows Search | 15 |
| Chapter 3 | Enterprise Vault options and mailbox icons | 17 |
| | Enterprise Vault options | 17 |
| | Enterprise Vault mailbox icons | 20 |
| Chapter 4 | Working with archived items | 21 |
| | Viewing archived items | 21 |
| | Searching for archived items | 22 |
| | Replying to and forwarding archived items | 22 |
| | Deleting archived items | 23 |
| | Canceling deletion of archived items | 24 |
| Chapter 5 | Storing and restoring items | 25 |
| | Storing items manually | 25 |
| | Storing folders manually | 26 |
| | Restoring archived items | 26 |
| | Canceling archiving and restore operations | 28 |

| | | |
|-----------|---|----|
| Chapter 6 | Managing Enterprise Vault archiving | 29 |
| | Synchronizing your Vault Cache | 29 |
| | Viewing and changing Vault Cache properties | 32 |
| Index | | 35 |

Introducing Symantec Enterprise Vault

This chapter includes the following topics:

- [About Enterprise Vault](#)
- [About Vault Cache](#)
- [About Virtual Vault](#)
- [About working offline](#)
- [How Enterprise Vault selects items to archive](#)
- [About the retention period for archived items](#)
- [About Enterprise Vault and Outlook conversations](#)

About Enterprise Vault

Enterprise Vault automatically moves emails and their attachments from the folders in your Outlook mailbox to an online storage area that is called a *vault*. This process is called *archiving*. Enterprise Vault runs automatically and usually performs archiving at off-peak times.

After Enterprise Vault archives emails, they remain available to you in Outlook in the following ways:

- Most administrators set up Enterprise Vault so that there is a *shortcut* in your mailbox to each archived email. A shortcut replaces the email in the mailbox folder and provides instant access to the archived email. The shortcut has the following special icon in the Outlook item list:



A shortcut looks like the original email and behaves in a similar way. For example, you can open an email from its shortcut, reply to the email, and copy or move it to another folder. Your administrator can configure Enterprise Vault so that shortcuts expire after a certain time. An expired shortcut disappears from the mailbox, but the archived item is still in your vault.

- If your administrator has enabled it, Outlook displays your vault as a *Virtual Vault* in the Navigation Pane.

The administrator can set up Enterprise Vault so that it archives Outlook items other than emails. If so, you may see archived Outlook calendar items, tasks, contacts, or notes in your Virtual Vault in the appropriate folder view.

Although archiving is automatic, you can choose to store items in the vault yourself at any time. When you store an item, Enterprise Vault adds it to your vault as an archived item. Enterprise Vault treats the items that you have stored in the same way as any other archived item.

You can also choose to restore archived items; that is, to move or copy archived items back into your mailbox in their original format. You do not need to restore archived items to open them or reply to them, or to perform other actions.

If you have access to more than one Microsoft Exchange account, note that you can only use Enterprise Vault actions on items in the primary mailbox. The primary mailbox is the first Exchange mailbox that was added to your Outlook profile.

Enterprise Vault does not normally archive any information that is held in your personal folder (PST) files on your computer. However, your administrator can archive these items for you. Contact your administrator if you have items in any personal folder files that need to be archived.

About Vault Cache

Your administrator can make the *Vault Cache* feature available to you. A Vault Cache is located on your computer, and contains copies of the items that are in your online vault. You need a Vault Cache if you want to do the following:

- Access archived items from shortcuts when you are not connected to your corporate network.
- Use Virtual Vault.

Your administrator can choose whether your Vault Cache stores complete archived items or partial archived items. You cannot change this option. A partial archived item includes enough information for Virtual Vault to display it in the Outlook item list, but not the item's full content.

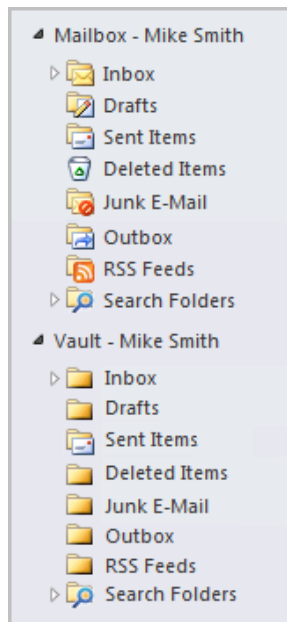
If your Vault Cache stores partial archived items, Enterprise Vault retrieves the full content from your online vault when it is required. For example, Enterprise Vault retrieves the full content of an archived item when you open the item from Virtual Vault. The type of Vault Cache (that is, whether it stores complete archived items or partial archived items) affects the accessibility of archived items when you work offline.

Enterprise Vault regularly synchronizes your online vault and your Vault Cache. Your administrator may also let you start the synchronization process yourself.

About Virtual Vault

If your administrator has enabled it, Outlook displays your vault in the Navigation Pane. This feature of Enterprise Vault is called *Virtual Vault*. A Virtual Vault appears like a mailbox folder or personal folder in the Outlook Navigation Pane. [Figure 1-1](#) shows a mailbox and a Virtual Vault.

Figure 1-1 Example of a Virtual Vault



The contents of the selected vault are shown in the Outlook Navigation Pane. You can open items in your vault and perform the normal Outlook actions on items, such as forward, reply, move, and delete. Depending on how your administrator

has set up Enterprise Vault, you may also be able to move items into your vault for archiving.

A Virtual Vault always shows you what is in your Vault Cache rather than what is in your online vault. A Virtual Vault may not be identical to your online vault if recent changes have not been synchronized.

A Virtual Vault always includes these two search folders:

| | |
|-------------------|--|
| Could Not Archive | Lists items that Enterprise Vault could not archive when it synchronized your Vault Cache with the online vault that is associated with your Outlook mailbox. |
| To Archive | Lists items that you have moved or copied into your Virtual Vault and that are awaiting archiving. The folder does not include items that Enterprise Vault could not archive for any reason. |

Note the following points about Virtual Vaults:

- You may be able to view the contents of shared archives, delegate archives, and Exchange managed folders in your Virtual Vault, but you cannot modify the contents in any of these cases.
- A Virtual Vault cannot contain public folder items.
- You cannot modify items by, for example, changing the content or read status, adding a flag for follow up, and so on.
- You may be able to move, delete, and rename Virtual Vault folders, but only if the folders do not exist in your mailbox.
- You cannot display the properties of a Virtual Vault folder.

About working offline

When Enterprise Vault archives an item from your mailbox, it normally leaves a shortcut that links directly to the archived item. Replacing items with shortcuts saves space in your mailbox. However, if you work offline or you are not connected to your corporate network, double-clicking a shortcut cannot open the item in your online vault.

A Vault Cache provides instant access to archived items, even when you work offline or are not connected to your corporate network. After you have set up a Vault Cache, you can retrieve archived items in the following ways:

- Open the items from the corresponding shortcuts in your mailbox.
- Open the items from your Virtual Vault.

Note that your administrator may have set up your Vault Cache so that it stores partial archived items. With this type of Vault Cache, the full content of archived items is inaccessible when you do not have a connection to your online vault.

Another possibility is that your Vault Cache stores both partial items and the full content of items that you have opened when you work online. In this case, you can open any previously opened items, even when there is no connection to your online vault.

If you have access to Archive Explorer when you work offline, it provides another way to access archived items in your Vault Cache.

When you work offline, you cannot perform the following actions using Enterprise Vault buttons or commands:

- Store items in a vault.
- Restore items from Enterprise Vault shortcuts.
- Delete items from a vault.

However, you can use your Virtual Vault to store, restore, and delete items. These actions take effect in the online vault after the next synchronization.

How Enterprise Vault selects items to archive

Enterprise Vault selects items to archive from your mailbox in one or both of the following ways:

- **Age of item.** Enterprise Vault archives items automatically as soon as they reach the specified age.
The age of a mail message is taken from the date you received it or sent it. The age of a document is taken from the date when it was last modified.
- **Mailbox size.** Enterprise Vault archives the oldest items in your mailbox until the mailbox contains a certain percentage of free space.

When both of these strategies apply, Enterprise Vault performs age-based archiving first. If age-based archiving does not free enough space in your mailbox, Enterprise Vault archives more items until the required percentage of space is free.

Archiving by age and archiving by percentage of mailbox size limit are the main strategies for selection of items to archive. The administrator may also have configured Enterprise Vault so that it archives large items first. Archiving large items first operates in addition to the main archiving strategy. Archiving large items first has the advantage that mailbox space is recovered by archiving relatively few items.

The archiving strategy is entirely under the control of the administrator. You cannot view or change the archiving strategy.

About the retention period for archived items

When Enterprise Vault archives an item, it automatically assigns a *retention category* to the item. The retention category specifies how long to keep the item. Your administrator can set up different retention categories for different types of data, such as Business or Legal. As Enterprise Vault monitors the vaults, it can then delete any item whose retention period has elapsed.

Retention categories are entirely under the control of the administrator. You cannot view or change retention categories.

About Enterprise Vault and Outlook conversations

You can perform Enterprise Vault actions on items that are arranged as Outlook conversations. The actions operate in the same way as in the normal folder view. You have to select items within the conversation to perform Enterprise Vault actions on them, rather than selecting only the conversation header.

Outlook conversations can include unarchived items, Enterprise Vault shortcuts, and archived items that are in Virtual Vault.

You might select items from one or more conversations and then choose an Enterprise Vault action that cannot be performed on some of the items. In this case, Enterprise Vault does the following:

- It performs the action on the items for which it is possible.
- It displays a dialog box that lists the items for which the action was unsuccessful and gives the reasons.

For example, you might select the following and try to store them in Enterprise Vault:

- Some unarchived items that are in your Inbox
- Some unarchived items that are in Personal Folders
- Some items that are already in Virtual Vault

Enterprise Vault stores the unarchived items, and lists the Personal Folder items and the items that are already archived.

Setting up Enterprise Vault

This chapter includes the following topics:

- [Installing Enterprise Vault](#)
- [About setting up Enterprise Vault](#)
- [Setting up a Vault Cache and Virtual Vault](#)
- [Showing or hiding your Virtual Vault](#)
- [Turning off Outlook AutoArchive](#)
- [Configuring Windows Search](#)

Installing Enterprise Vault

To install Enterprise Vault, run the installation from the file `Symantec Enterprise Vault HTTP-Only Outlook Add-in-en.msi`.

To install Enterprise Vault

- 1 Exit Outlook.
- 2 Double-click `Symantec Enterprise Vault HTTP-Only Outlook Add-in-en.msi`.
- 3 Follow the instructions on your screen.
- 4 Restart Outlook.
- 5 Turn off the AutoArchive facility in Outlook.

See [“Turning off Outlook AutoArchive”](#) on page 14.

About setting up Enterprise Vault

After Enterprise Vault is installed, it is immediately ready to use. However, if you want to use Vault Cache and Virtual Vault, you may need to do some further setting up.

If you can see your Virtual Vault in the Outlook Navigation Pane, you do not need to set up either the Virtual Vault or a Vault Cache. If a Virtual Vault does not exist, but your administrator has configured Enterprise Vault to let you use it, all you need to do is set up a Vault Cache.

Setting up a Vault Cache and Virtual Vault

If a Vault Cache is not already set up, you can run the Vault Cache wizard. The wizard may start automatically when you open Outlook. If the wizard does not start automatically, follow the procedure below.

You need to run the wizard once only. The wizard sets up your Vault Cache, and starts synchronization for the first time. Synchronization is the process that keeps your Vault Cache up to date with your online vault.

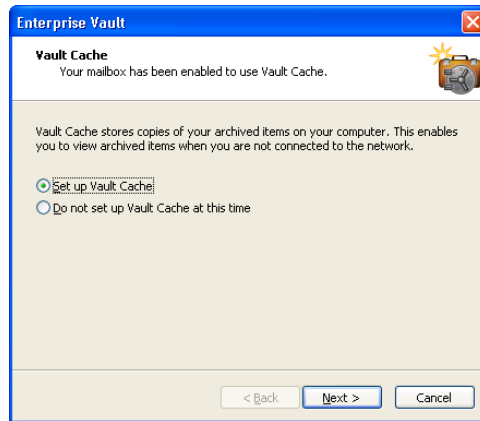
You do not need to perform any further setup for Virtual Vault. When the first synchronization is complete, your Virtual Vault normally appears in the Outlook Navigation Pane. If it does not appear, you can choose an option to display it.

See [“Showing or hiding your Virtual Vault”](#) on page 13.

To set up a Vault Cache

- 1 Click the **File** tab and then click **Enterprise Vault**.
- 2 Click **Enable Vault Cache**.

The Vault Cache wizard appears.



- 3 On the first page of the Vault Cache wizard, select **Set up Vault Cache**, and then click **Next**.
- 4 If the next page includes the **Apply age limit** option, choose the maximum age of archived items to download automatically to your Vault Cache. This page appears only if your administrator has configured certain Enterprise Vault options.

To apply an age limit, follow these steps:

- Check **Apply age limit**.
- Enter a value for the maximum age of archived items to download automatically to your Vault Cache.
- Click **Next**.

If you do not want to apply an age limit, uncheck **Apply age limit**.

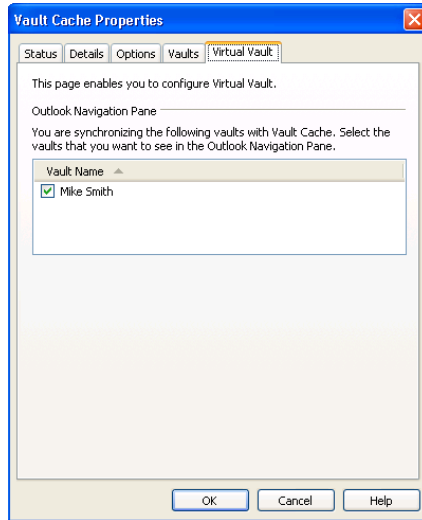
- 5 On the final page, click **Finish** to start synchronization.

Showing or hiding your Virtual Vault

Your Virtual Vault normally appears automatically in the Outlook Navigation Pane after your Vault Cache has been set up. However, in some circumstances, you may need to take the following steps to make it visible.

To show or hide your Virtual Vault

- 1 Click the **File** tab and then click **Enterprise Vault**.
- 2 Click **Configure Vault Cache**.
- 3 On the **Virtual Vault** tab, check or uncheck your vault name to show or hide it in the Outlook Navigation Pane.



- 4 Click **OK**.

You can also hide your Virtual Vault by right-clicking it in the Outlook Navigation Pane and then clicking **Close "Vault - name"**.

Turning off Outlook AutoArchive

Outlook AutoArchive is different from Enterprise Vault archiving. AutoArchive archives items to a personal folder (PST) file. Enterprise Vault archives items to a vault on your network. The archived items can be safely backed up, and you can view, search for, or restore them. Now that you use Enterprise Vault to archive items from your mailbox, we recommend that you turn off AutoArchive.

To turn off Outlook AutoArchive

- 1 Click the **File** tab and then click **Options**.
- 2 Click **Advanced**.
- 3 Under **AutoArchive**, click **AutoArchive Settings**.

- 4 Uncheck **Run AutoArchive every *n* days**.
- 5 Click **OK**.
- 6 To return to the previous view, close the **Outlook Options** dialog box.

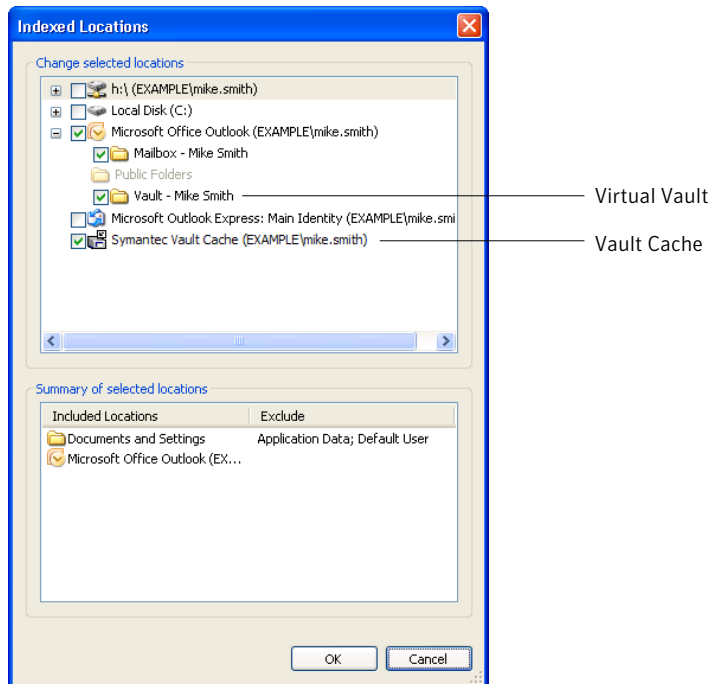
Configuring Windows Search

Follow the steps below to determine whether your administrator has set up Enterprise Vault so that Windows Search is enabled automatically for use with your Vault Cache and Virtual Vault. You can also use this procedure to configure Windows Search, if required.

To check the Windows Search options

- 1 In Outlook, open the Indexing Options dialog box. How you open this dialog box depends on which version of Windows you use. For example:
 - In Windows XP, right-click the **Windows Search** icon in the Windows taskbar, and then click **Windows Search Options**.
 - In Windows 7, click **Start > Control Panel**. In the search box, type **indexing options**, and then click **Indexing Options**.
- 2 In the Indexing Options dialog box, click **Modify**.

The Indexed Locations dialog box appears. (The following figure shows the Windows XP version of the dialog box.)



- 3 In the **Change selected locations** list, ensure that the entry for your Virtual Vault is selected. In addition, if the Symantec Vault Cache location appears in the list, ensure that it is selected.
- 4 Click **OK**.
- 5 Close the Indexing Options dialog box.

When your computer is idle, Windows Search updates its index to include the items in your Vault Cache.

Enterprise Vault options and mailbox icons

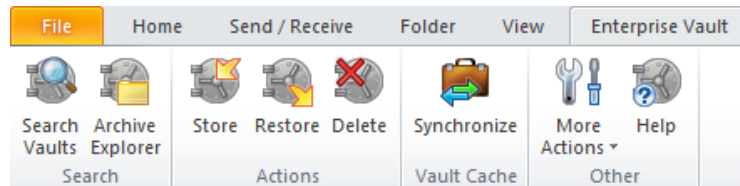
This chapter includes the following topics:

- [Enterprise Vault options](#)
- [Enterprise Vault mailbox icons](#)

Enterprise Vault options

Depending on how your administrator has set up Enterprise Vault, a number of buttons may be available on the Enterprise Vault tab on the Microsoft Outlook ribbon.

Figure 3-1 Enterprise Vault tab



The Other group may include a More Actions button. Your administrator can place Enterprise Vault options as commands on the More Actions menu, rather than directly as buttons on the Enterprise Vault tab. The following example shows the Cancel Operation command on the More Actions menu.

Figure 3-2 More Actions menu

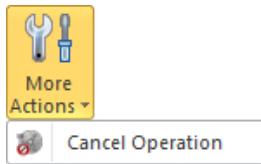





Table 3-1 lists all the options that may be on the Enterprise Vault tab or the More Actions menu. Some options have longer names when they are on the More Actions menu. The longer names are shown in brackets in this table. For example, the Store option appears on the More Actions menu as Store in Vault.

Table 3-1 Options on the Enterprise Vault tab or More Actions menu

| Option | Icon | Description |
|------------------------------|------|---|
| Search Vaults | | Search for archived items in the available vaults. See “Searching for archived items” on page 22. If the Search Vaults button is on the Enterprise Vault tab, it also appears on the Outlook Search tab. |
| Archive Explorer | | Display a tree view of the items in your vault. If the Archive Explorer button is on the Enterprise Vault tab, it also appears on the Outlook Search tab. |
| Store (Store in Vault) | | Archive the selected items. You can only use this option on items in the mailbox, and not on items in Virtual Vault. See “Storing items manually” on page 25. |
| Restore (Restore from Vault) | | Restore the items that are associated with the selected Enterprise Vault shortcuts. You can only use this option on items in the mailbox, and not on items in Virtual Vault. See “Restoring archived items” on page 26. |
| Delete (Delete from Vault) | | Delete archived items. You can only use this option on items in the mailbox, and not on items in Virtual Vault. See “Deleting archived items” on page 23. |

Table 3-1 Options on the Enterprise Vault tab or More Actions menu
(continued)

| Option | Icon | Description |
|---------------------------------------|---|---|
| Cancel (Cancel Operation) |  | <p>Cancel the Enterprise Vault operation that is currently in progress. You can cancel the following operations:</p> <ul style="list-style-type: none"> ■ Delete (Delete from Vault) ■ Store (Store in Vault) ■ Restore (Restore from Vault) <p>You can only use this option on items in the mailbox, and not on items in Virtual Vault.</p> <p>See “Canceling deletion of archived items” on page 24.</p> <p>See “Canceling archiving and restore operations” on page 28.</p> |
| Synchronize (Synchronize Vault Cache) |  | <p>Synchronize your Vault Cache with your online vault.</p> <p>See “Synchronizing your Vault Cache” on page 29.</p> |
| More Actions |  | <p>Display a menu containing one or more further Enterprise Vault commands.</p> <p>Your Enterprise Vault administrator controls whether options appear as buttons on the Enterprise Vault tab or as commands on the More Actions menu.</p> |

Enterprise Vault adds its own page to the Outlook Backstage view. (The Backstage view is displayed when you click the Outlook File tab.) The Enterprise Vault page includes system information, and may include more Enterprise Vault buttons.

[Table 3-2](#) lists the Enterprise Vault buttons that may be on the Enterprise Vault page in the Backstage view.

Table 3-2 Enterprise Vault buttons in the Backstage view




| Button | Icon | Description |
|--------------------|---|--|
| Enable Vault Cache |  | <p>Run the Vault Cache wizard.</p> <p>See “Setting up a Vault Cache and Virtual Vault” on page 12.</p> |





Table 3-2 Enterprise Vault buttons in the Backstage view *(continued)*

| Button | Icon | Description |
|-----------------------|---|--|
| Configure Vault Cache |  | Open the Vault Cache Properties dialog box. See “ Viewing and changing Vault Cache properties ” on page 32. |
| Expiry Report |  | List the items that Enterprise Vault will delete from your vault because their retention period is about to end. If necessary, you can restore selected items to your mailbox. |

Enterprise Vault mailbox icons

The items in your Outlook mailbox may be marked with the following icons.

Table 3-3 Enterprise Vault mailbox icons

| Icon | Description |
|---|---|
|  | Shortcut to archived item. You can double-click the shortcut to view the contents of the original item. You can forward or reply to the item, and perform other actions available in Outlook. Or you can select the shortcut and then restore the item to your mailbox. |
|  | Pending archive. Enterprise Vault has marked the item for storage in a vault. |
|  | Pending restore. You have chosen to restore the item from your vault. A restored item is the same as it was before it was archived. It has its original icon. A copy of the item remains in the vault. |
|  | Pending deletion. You have chosen to delete the item from your vault. Enterprise Vault also deletes the shortcut from your mailbox. |

Working with archived items

This chapter includes the following topics:

- [Viewing archived items](#)
- [Searching for archived items](#)
- [Replying to and forwarding archived items](#)
- [Deleting archived items](#)
- [Canceling deletion of archived items](#)

Viewing archived items

When Enterprise Vault archives an item, it may leave a shortcut in your mailbox. The shortcut is a direct link to the archived item.

If the item is not immediately available, Enterprise Vault shows the shortcut contents instead. You can then choose to restore the item to your mailbox.

You can also view archived items that are in your Virtual Vault.

To view an archived item

- 1 Select the shortcut to the item, or select the item in your Virtual Vault.
- 2 Use any of the normal Outlook actions to open the item.

Searching for archived items

After Enterprise Vault has archived an email or another Outlook item, you can find the item with Outlook Instant Search. Instant Search finds both archived items in your Virtual Vault and shortcuts in your mailbox.

If there is no shortcut to the archived item and you cannot find the item in Virtual Vault, you can use the Enterprise Vault Search Vaults feature.

To search for archived items with Search Vaults

- 1 On the **Enterprise Vault** tab, in the **Search** group or on the **More Actions** menu, click **Search Vaults**. Or click in the Outlook Instant Search box and then on the **Search** tab, in the **Enterprise Vault** group, click **Search Vaults**.
- 2 If Enterprise Vault prompts you for your logon details, type them and then click **OK**.

If the logon dialog box does not have a separate **Domain** field, you must type your user name in the form *domain_name\user_name*.

- 3 Enter the search criteria, and then start the search.
- 4 If required, restore one or more items to the Restored Items folder in your mailbox. The Restored Items folder is an Enterprise Vault folder that is automatically created when you first restore items.

For more information on how to use the search facilities, see the online Help that accompanies them.

Replying to and forwarding archived items

You can reply to or forward an archived item from its shortcut, or from your Virtual Vault. Outlook opens the item in its original form, exactly as it does when you reply to or forward any other item.

To reply to an archived item

- 1 Select the shortcut to the item, or select the item in your Virtual Vault.
See [“Restoring archived items”](#) on page 26.
- 2 Use any of the normal Outlook actions to reply to the item.

To forward an archived item

- 1 Select the shortcut to the item, or select the item in your Virtual Vault.

Note: You cannot use shortcuts to forward two or more archived items in their original form. If you select multiple shortcuts to forward, Enterprise Vault attaches the actual shortcuts to the forwarding email. To forward multiple archived items in their original form, select the items in your Virtual Vault. Alternatively, restore the archived items to your mailbox before you forward them.

See [“Restoring archived items”](#) on page 26.

- 2 Use any of the normal Outlook actions to forward the item.

Deleting archived items

If your Enterprise Vault administrator has enabled you to delete items from a vault, you can do so in the following ways. You can also delete archived items from within Enterprise Vault search applications.

You can only delete a folder from Virtual Vault if the folder does not exist in your mailbox.

To use shortcuts to delete archived items

- 1 Select the shortcuts to the archived items that you want to delete.
You can include any items that are not shortcuts. Enterprise Vault ignores such items.
- 2 On the **Enterprise Vault** tab, in the **Actions** group, click **Delete**. Or on the **More Actions** menu, click **Delete from Vault**.
- 3 Click **Yes** to confirm that you want to delete both the shortcuts and the archived items.

The icons next to the items change to indicate a status of pending deletion.

To delete an item that you have opened from a shortcut

- 1 On the **Message** tab of the opened item's window, in the **Delete** group, click **Delete**.
- 2 Click **Yes** to confirm that you want to delete the item.
- 3 If a further prompt appears, choose to delete the shortcut only or both the shortcut and the archived item.

If you delete the shortcut only, the item remains in your online vault and you can still retrieve the item from your Virtual Vault.

To delete items from a Virtual Vault

- 1 In a Virtual Vault folder, select the items that you want to delete.
- 2 On the **Home** tab, in the **Delete** group, click **Delete**. Or on the right-click menu, click **Delete**.

To delete a folder from a Virtual Vault

- 1 In your Virtual Vault, select the folder that you want to delete.
- 2 On the right-click menu, click **Delete Folder**.
- 3 In the prompt window that appears, click **Yes** to confirm the deletion or **No** to cancel it.

See [“About Enterprise Vault and Outlook conversations”](#) on page 10.

Canceling deletion of archived items

If an item has a status of pending deletion, you may be able to stop Enterprise Vault completing the operation.

To cancel deletion of an archived item

- 1 Select the items for which you want to cancel deletion.
You can include any items that Enterprise Vault is not processing. Enterprise Vault ignores such items.
- 2 On the **Enterprise Vault** tab, in the **Actions** group, click **Cancel**. Or on the **More Actions** menu, click **Cancel Operation**.

Storing and restoring items

This chapter includes the following topics:

- [Storing items manually](#)
- [Storing folders manually](#)
- [Restoring archived items](#)
- [Canceling archiving and restore operations](#)

Storing items manually

Enterprise Vault performs automatic archiving in the background, and does not require any action from you. However, there may be occasions when you want to store one or more items in your vault manually. You can store items manually if your administrator has set up Enterprise Vault to permit it.

You can use an option on the Enterprise Vault tab in Outlook to store items. You can also move or copy items to your Virtual Vault to store them. If you store an item by moving or copying it into your Virtual Vault, you cannot cancel the archiving operation.

To store items from an Exchange managed folder, you must use the Enterprise Vault option. You can only store these items if your administrator has enabled archiving of Exchange managed folders. Note that you cannot modify the contents of Exchange managed folders in your Virtual Vault.

To store items using an Enterprise Vault option

- 1 In your mailbox, select one or more items to store.
- 2 On the **Enterprise Vault** tab, in the **Actions** group, click **Store**. Or on the **More Actions** menu, click **Store in Vault**.
- 3 Click **OK** to confirm that you want to store the items.

To store items using Virtual Vault

- 1 Select one or more items to store.
- 2 Use any of the normal Outlook actions to move or copy the items into your Virtual Vault.

For example, you can store the items in the following ways:

- To move the items, drag them into the Virtual Vault folder where you want to store them. Or right-click them, and then click **Move** and select a Virtual Vault folder.
- To copy the items, hold down **Ctrl** and drag them into the Virtual Vault folder where you want to store them.

See “[About Enterprise Vault and Outlook conversations](#)” on page 10.

Storing folders manually

Enterprise Vault performs automatic archiving in the background, and does not require any action from you. However, there may be occasions when you want to store a complete folder in your vault manually. You can select the entire contents of the folder and store the items manually. Alternatively, you can store a folder if your administrator has set up Enterprise Vault to permit it. You cannot store a complete mailbox.

You can use the following procedure if you have Virtual Vault enabled.

To store a folder

- 1 Select a folder to store.
- 2 Use any of the normal Outlook actions to move or copy the folder into your Virtual Vault.

For example, you can store the folder in the following ways:

- To move the folder, right-click it. Then click **Move Folder** and select a Virtual Vault folder in the Move Folder dialog box.
- To copy the folder, right-click it. Then click **Copy Folder** and select a Virtual Vault folder in the Copy Folder dialog box.

See “[About Virtual Vault](#)” on page 7.

Restoring archived items

You do not normally need to restore archived items to your mailbox, as you can view them easily from their shortcuts or from Virtual Vault. If you do restore

items, they are restored in their original format. For example, if a restored item is a mail message, you can still reply as normal.

You can restore archived items in either of the following ways:

- By using their shortcuts. Items that you restore from shortcuts are always restored to the current folder (where the shortcuts are).
- By using the normal Outlook actions to copy or move the items from your Virtual Vault to your mailbox.

If you want to restore items to a public folder, you must have Owner access to the folder. If you do not have Owner access, you can copy a shortcut from a public folder to your mailbox. Then you can restore the item to your mailbox.

Enterprise Vault may take some time to restore any items that are stored offline.

To restore archived items from shortcuts

- 1 If the shortcuts are in a public folder or a PST file, copy them to a folder in your mailbox.
- 2 In your mailbox, select shortcuts to items that you want to restore. Use the normal Outlook selection to select single or multiple shortcuts. You can include any items that are not shortcuts. Enterprise Vault ignores such items.
- 3 On the **Enterprise Vault** tab, in the **Actions** group, click **Restore**. Or on the **More Actions** menu, click **Restore from Vault**.
- 4 Click **OK** to confirm that you want to restore the items. The original items are restored to your mailbox.

To restore archived items from a Virtual Vault

- 1 In your Virtual Vault, select the items that you want to restore. Use the normal Outlook selection to select single or multiple items.
- 2 Use any of the normal Outlook actions to move or copy the items into your mailbox.

For example, you can restore the items in the following ways:

- To move the items, drag them into the mailbox folder where you want to restore them. Or right-click them, and then click **Move to Folder** and select a mailbox folder in the Move Items dialog box.
- To copy the items, hold down **Ctrl** and drag them into the mailbox folder where you want to restore them.

See [“About Enterprise Vault and Outlook conversations”](#) on page 10.

Canceling archiving and restore operations

If an item in your mailbox has a status of pending archive or pending restore, you may be able to stop Enterprise Vault from completing the operation.

You do not normally need to cancel archiving and restore operations. If you want to open an item that has a status of pending archive or pending restore, you can double-click it.

You cannot cancel archiving and restore operations on items in your Virtual Vault.

To cancel archiving and restore operations

- 1 Select the items for which you want to cancel the operation.

You can include any items that Enterprise Vault is not processing. Enterprise Vault ignores such items.

- 2 On the **Enterprise Vault** tab, in the **Actions** group, click **Cancel**. Or on the **More Actions** menu, click **Cancel Operation**.

Managing Enterprise Vault archiving

This chapter includes the following topics:

- [Synchronizing your Vault Cache](#)
- [Viewing and changing Vault Cache properties](#)

Synchronizing your Vault Cache

Enterprise Vault keeps your Vault Cache up to date by synchronizing it with the online vault that is associated with your Outlook mailbox.

The administrator may also have configured Enterprise Vault so that you can do the following:

- Synchronize the Vault Cache yourself at any time.
- Suspend synchronization. When you suspend synchronization, any current synchronization process stops and Enterprise Vault does not perform any further updates to your Vault Cache.

Note: Synchronization remains suspended even if you stop and restart Outlook, until you choose to resume synchronization.

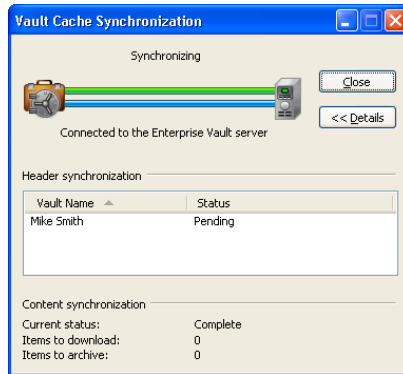
- Synchronize your Vault Cache with additional vaults to which you have access.

Enterprise Vault automatically determines which items to download to your Vault Cache.

To synchronize your Vault Cache

- ◆ On the **Enterprise Vault** tab, in the **Vault Cache** group, click **Synchronize**. Or on the **More Actions** menu, click **Synchronize Vault Cache**.

The Vault Cache Synchronization dialog box appears.

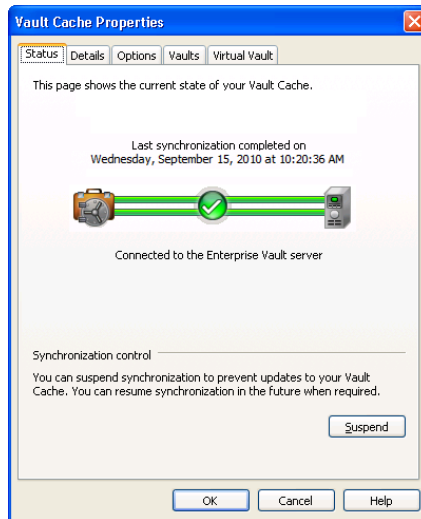


The Vault Cache Synchronization dialog box provides summary information about the synchronization process. You can close the dialog box while synchronization is in progress, and continue to work with Outlook.

To suspend or resume synchronization

- 1 Click the **File** tab and then click **Enterprise Vault**.
- 2 Click **Configure Vault Cache**.

The Vault Cache Properties dialog box appears.

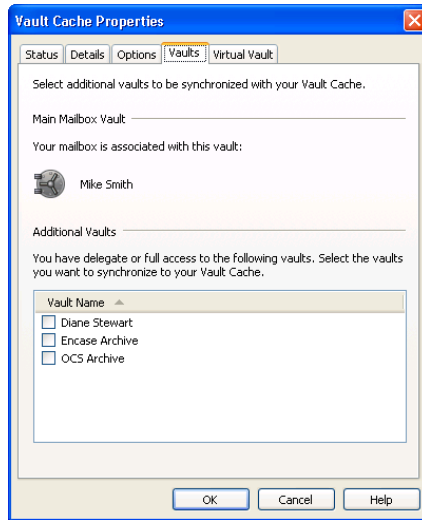


- 3 In the Vault Cache Properties dialog box, on the **Status** tab, click **Suspend** or **Resume**.

To choose additional vaults to synchronize with

- 1 Click the **File** tab and then click **Enterprise Vault**.
- 2 Click **Configure Vault Cache**.

- 3 In the Vault Cache Properties dialog box, click the **Vaults** tab.



If there is no **Vaults** tab, the administrator has not enabled this feature.

- 4 To choose an additional vault, check the box next to its name.
- 5 Click **OK**.

The additional vault appears in your Virtual Vault after the synchronization process has ended.

Viewing and changing Vault Cache properties

The Vault Cache Properties dialog box can contain up to five tabbed pages. The administrator controls which tabs are included in the dialog box.

If the appropriate tabs are available, the Vault Cache Properties dialog box lets you do the following:

- Suspend or resume synchronization.
- Start synchronization.
- View synchronization progress.
- Set the disk space to use for the content of items in your Vault Cache.
- Set the amount of time after Outlook starts before Enterprise Vault checks for items to be synchronized to your Vault Cache.

- Choose vaults to synchronize with your Vault Cache, in addition to the main vault that is associated with your mailbox.
- Select the vaults that you want to see as Virtual Vaults in the Outlook Navigation Pane.

To view and change Vault Cache properties

- 1 Click the **File** tab and then click **Enterprise Vault**.
- 2 Click **Configure Vault Cache**.

The Vault Cache Properties dialog box contains one or more tabs. For information about the currently selected tab, click **Help** in the Vault Cache Properties dialog box.

Index

A

- age of archived item 9–10
- archiving
 - canceling 28
 - manual 25–26
- archiving strategy 9
- AutoArchive
 - turning off 14

B

- Backstage view 19–20

C

- canceling an Enterprise Vault operation 24, 28
- conversation view 10

D

- deleting items from a vault 23

F

- finding archived items 22
- folders
 - archiving from Exchange Managed Folders 25
 - storing manually 26
- forwarding archived items 22

I

- icons 20
- installing Enterprise Vault 11
- introduction 5
- items
 - canceling archiving and restore operations 28
 - canceling deletion 24
 - finding 22
 - storing manually 25
 - viewing from shortcut 21
 - viewing from Virtual Vault 21

M

- mailbox
 - icons 20
- managed folders 25
- manual storing 26

P

- pending archive 20, 28
- pending deletion 20, 24
- pending restore 20, 28
- PST files 6, 27

R

- replying to archived items 22
- restoring items
 - from shortcuts 27
 - from Virtual Vault 27
- retention categories 10

S

- shortcuts
 - deleting items 23
 - overview 5
 - replying and forwarding 22
 - restoring items 27
 - viewing items 21
- storing items 25
- synchronizing a Vault Cache 29

V

- Vault Cache 6, 8
 - configuring Windows Search 15
 - properties 32
 - setting up 12
 - synchronizing 29
- vaults
 - deleting items 23
 - finding items 22
 - storing items 25–26
 - Vault Cache 6, 8, 12, 15, 29, 32

viewing archived items 21

Virtual Vault 6

- configuring Windows Search 15

- deleting items 23

- finding items 22

- hiding or showing 13

- replying and forwarding 22

- restoring items 27

- setting up 12

- viewing items 21

W

Windows Search 15

working offline 6, 8