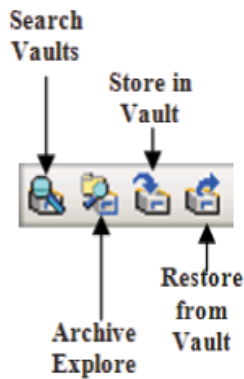


## Enterprise Email Vault

### What does Enterprise Email Vault do?

Enterprise Email Vault archives items from your mailbox. Older email, calendar items and attachments are moved to a **Vault**, which can be searched if you need to view or retrieve an item that has been archived. This will replace your current method of Archiving to exchange Large Personal Folders (.PST files). This solution keeps older items out of your mailbox in order to minimize the size of your mailbox.

### What does this mean to me?



New icons are added to Outlook. These are located in the upper right hand corner.

1. **Search Vaults:** Allows User to search all information in the vault.
2. **Archive Explorer:** Opens a browser to view information in the vault
3. **Store in Vault:** Moves selected items from the live mailbox to the vault.
4. **Restore from Vault:** Restores information from the vault to the live mailbox.

### Default User Setting:

1. Click on Archive Explore
2. Click on "Settings"
3. Verify that your correct mailbox information is loaded
4. Verify that Microsoft Outlook is selected
5. Once verified select OK

- All Mail Items and Calendar entries in your mailbox older than 60 days will be automatically archived to the Vault. Shortcuts will replace the items in the Outlook mailbox.
- Each item archived to your vault is fully indexed for easy searching; this includes most attachments.
- All mail folders and calendar entries are subject to being archived into the vault; with the exception of the Deleted Items folder. The Deleted Items folder will not be moved to the Vault.
- The Deleted Items folder will be administratively purged after fourteen days. Move anything you want to keep into another folder.

### Why are we doing this?

- Centralized archiving solution for users
- Journaling solution for emails entering and exiting the system
- Reduce storage
  - Reduce the size of mailbox
  - Eliminate Storage of (PST) files on File Servers
- Reduce backup times and costs
- View archived email via Outlook Web Access
- Central Vault search capability
- Increase management and reporting capabilities

Distinguishing between an archived email and non-archived is fairly easy by looking at the icon on the left of the message.

- Email that has **not** been read
- Email that has been read
- Email that has been moved to vault (read and unread)

### Enterprise Email Vault is replacing Large Personal Files/Archive Folders:

- The default mailbox size is 150 mb. Information stored in Large Personal Files/Archive Folders in the Outlook client will now count toward the 150 mb allotment. Once the information is moved to the vault, it will no longer count against the 150 mb limit. Specific directions for moving information to the vault are contained in the user manual.

### What does Enterprise Email Vault archive?

- Email Messages**
- Attachments**
- Calendar Entries**

## Why are we moving away from Personal Store Table (PST) files?

PST files are also known as Large Personal Folders or Archive folders and located within Microsoft Outlook. The PST files are located on users personal drives or other locations outside of the users Outlook Mailboxes. They were not designed to handle the rigorous demands of today's large-scale corporate email requirements. Ultimately, these files create more problems than they solve and are one of the main reasons why organizations eventually seek an enterprise archiving solution.

### Migrating your PST files:

CMS will migrate your PST files shortly after you have been enabled for Enterprise Vault. This process begins in the evening hours and will possibly run through the next business day. During the migration, you will not have access to your Large Personal Folders or Archive Folders until it is complete. Once migrated, you will have full access to the archived emails from within your vault. A folder structure will be created within Outlook and within Archive Explorer that matches your archive structure. You may see empty folders within Outlook but the folders within Archive Explorer will contain your archived messages. You can continue to copy messages to the folders within Outlook and after 60 days those messages will be automatically copied to your vault.

**Note:** The vault is viewed in an Internet browser: if a message or folder is not displaying try a Refresh (F5).

**Tip:** Any view or edit rights that were previously granted will not apply to the vault. To request rights submit an ESR by contacting BCCS CSC 217.524.4784 / 800.366.8768.



**Tip:** Once an email has been moved to the vault it cannot be moved directly to a different file folder within the vault.

**Tip:** Deleted items will not be archived. Any items placed in this folder are automatically deleted after 14 days.

## When does Enterprise Vault archive items?



### Archiving by Size of an item

Large items are archived first to recover mailbox space while archiving relatively few items.



### Archiving by Age of an item

Once the Vault has archived large items, it archives by **age**. The age of a mail message is taken from the date it was received or last modified.

Enterprise Vault runs automatically during off-peak hours so no user intervention is necessary.

## Archive Explorer - Right Click Options

If you are in view Archived items using MS Outlook mode, you have all of the options available; however, in Web Browser mode you will not have "Save as...", Reply, Reply to All, and Forward" options available.

**Open** – will open the item in the mode selected in settings

**Save** – will allow you to save the mail item in multiple formats

**Reply** - will open the email in Outlook and place it into Reply message window

**Reply to All** – will open the email in Outlook and place it into a Reply to All message window

**Forward** - will open the email in Outlook and place it into Forward message window

**Search** – will open the Search window across the top of the Archive Explorer (same as clicking the Search button at top of screen).

**Copy to Mailbox** – you have the option to copy to the Original Location within your mailbox or to a special Restored Items folder in your mailbox. This is same as the "restore to mailbox" function found in other areas. It leaves the original in your Vault / Archive Explorer. Selected Folder option is not available for our users.

**Move to Mailbox** – you have the option to move to the Original Location within your mailbox or to a special Restored Items folder in your mailbox. This function removes the item(s) from the Vault / Archive Explorer. This accomplishes a restore/copy and then a delete.

**Delete** – this will delete the highlighted items from the Vault. To not see these items again you may need to press F5 button or perform a right click Refresh.

**Display Options** – there are 3 options, all can be toggled on or off and can be used simultaneously.

**1. Retention Category** – adds a column and displays the retention category of mail items, the names provided are generic and mean little to the user.

**2. Auto Preview** – provides you a view of the 1<sup>st</sup> line of each item listed.

**3. Preview Pane** – provides same function as in Outlook. It displays the highlighted message in a separate pane below the item list area.

**Refresh** – as discussed above this refreshes the internet explorer cache for the section of the page your mouse is highlighted on. Pressing F5 accomplishes a refresh also.

**Help** - provides you help on the Archive Explorer. Please note: the help discusses several features concerning retention categories that are not available to Users. Retentions are an administrative function.