

## Hosted Mail Archiving (HMA) User Guide

### Log in to Personal Archive

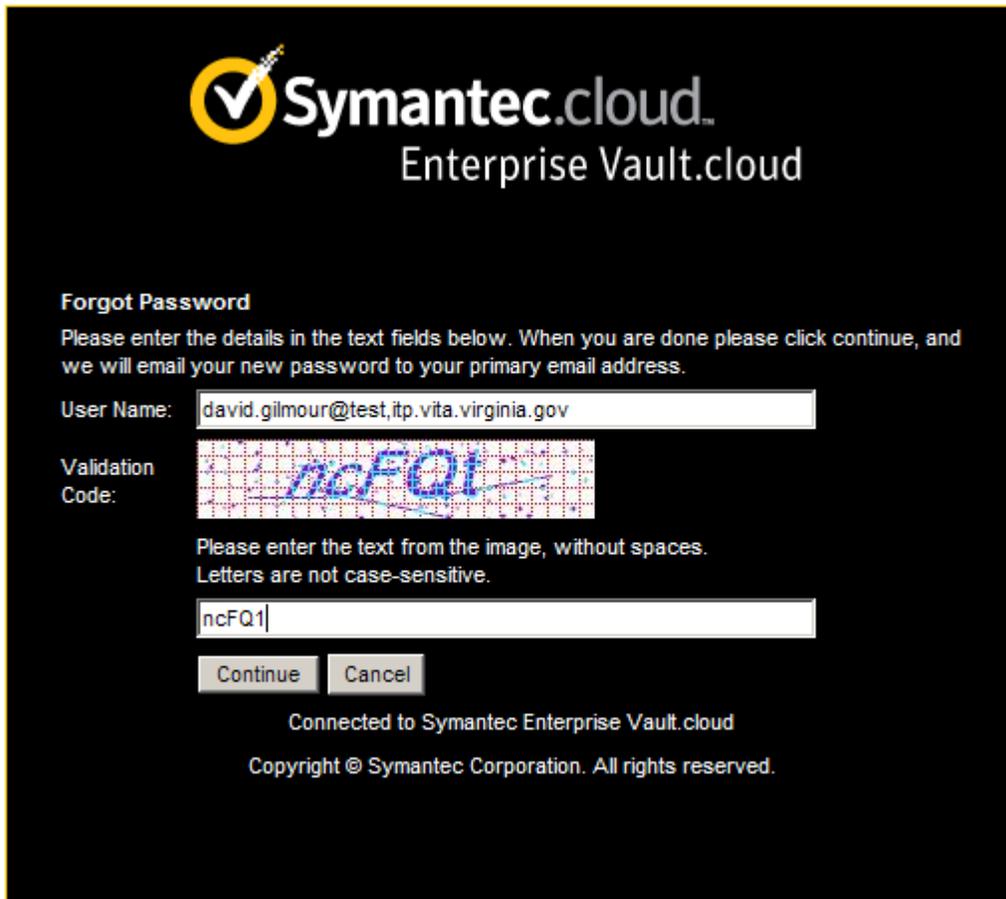
To log in to Personal Archive

1. Please click on the archive link in your HMA activation confirmation email to access your archive. Once you click on the link, the below page should pop-up.



The screenshot shows the Symantec.cloud Enterprise Vault.cloud login interface. At the top left is the Symantec logo (a yellow checkmark in a circle). The text "Symantec.cloud" and "Enterprise Vault.cloud" is displayed in white. Below this, there is a "Security" section with a "(Show Explanation)" link. Two radio buttons are present: "This is a public or shared computer" (selected) and "This is a private computer". Below the security options are three input fields: "User Name:", "Password:", and "Language:" (with a dropdown menu showing "English"). A "Log In" button is located below the language dropdown. A "Forgot Password" link is positioned below the "Log In" button. At the bottom of the form, it says "Connected to Symantec Enterprise Vault.cloud" and "Copyright © Symantec Corporation. All rights reserved."

2. You will then need to click on "Forgot Password" and enter your email address for your password to be emailed to you.



**Symantec.cloud**  
Enterprise Vault.cloud

**Forgot Password**

Please enter the details in the text fields below. When you are done please click continue, and we will email your new password to your primary email address.

User Name:

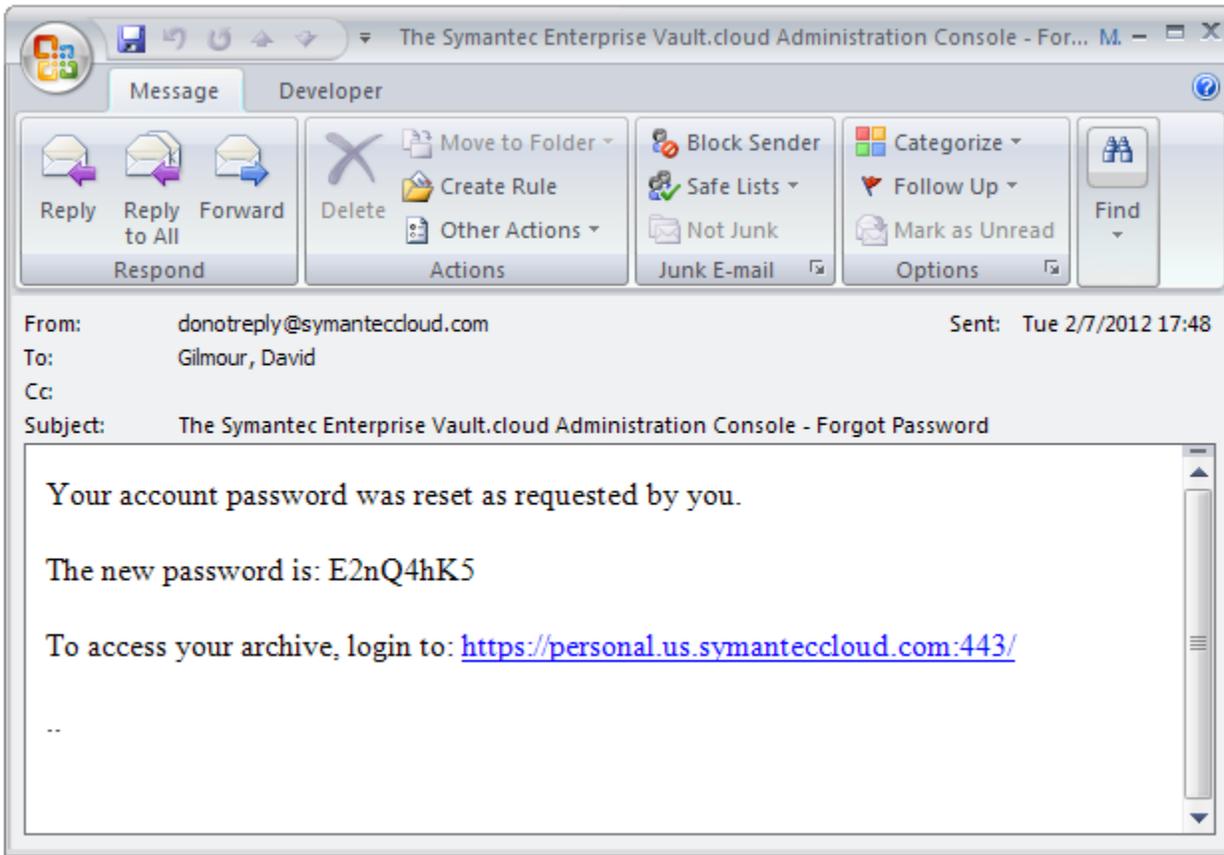
Validation Code: 

Please enter the text from the image, without spaces.  
Letters are not case-sensitive.

Connected to Symantec Enterprise Vault.cloud

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3. The email with your password will look similar to the screen shot below. Once you receive this email, please click on the link and enter your password to access the archive.



You will once again be prompted to change your password to characters of your choosing once you login to the archive.

Select a Security option

Refer to the following table for more information:

<p>This is a public or shared computer</p>	<p>Personal Archive prompts you for your user name and password each time you access the login screen and automatically logs you out after 20 minutes of inactivity. Default option selected</p>
<p>This is a private computer</p>	<p>Personal Archive stores your credentials in your browser's local profile cache for 10 hours allowing you to bypass the login screen after your initial successful login.</p>

	 You can clear this setting by logging out of Personal Archive.
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3. Enter your user name and password.
4. Select a Language setting.
5. Click Log In.

Using Personal Archive

Personal Archive's easy-to-use interface allows you to quickly and easily access your archived emails. You can view emails and attachments, restore emails deleted from your Outlook Inbox, or tag groups of emails for quicker access.

About Archived Emails

Once your organization enables your Personal Archive account, the service begins journaling a copy of all emails you send and receive to your archive in real time. This archival process allows your organization to store copies of all emails sent and received by users in accordance with retention requirements defined by your agency. By providing you access to Personal Archive, your organization provides you access to the copies of the emails stored in your archive. Using Personal Archive to access the emails stored in your archive also allows you to access emails deleted from your Outlook Inbox. However, since Personal Archive stores emails in accordance with your organization's retention policy, you cannot delete any emails from your archive. Personal Archive only deletes emails from your archive when the retention period expires.

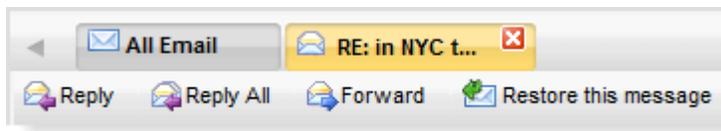
View Emails

You can display your emails in Personal Archive in the following views.

View	Description
All Email	Displays sent and received emails. This is the default view.

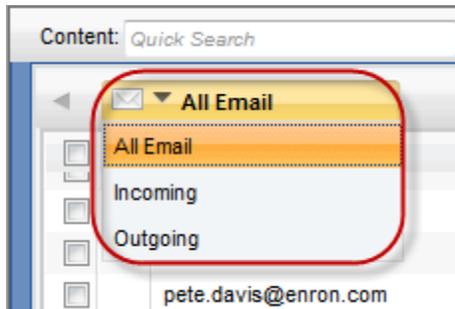
Incoming	Displays only received emails.
Outgoing	Displays only sent emails.

✔ You can open and view multiple emails in Personal Archive in tabbed view; each email you open appears in a new tab. After you open an email in a new tab, you can select the All Email tab or the tab for another open email at any time during your session.



### To change views

To limit your view of your mailbox by the message direction, click the All Email tab above the message pane and select an option.

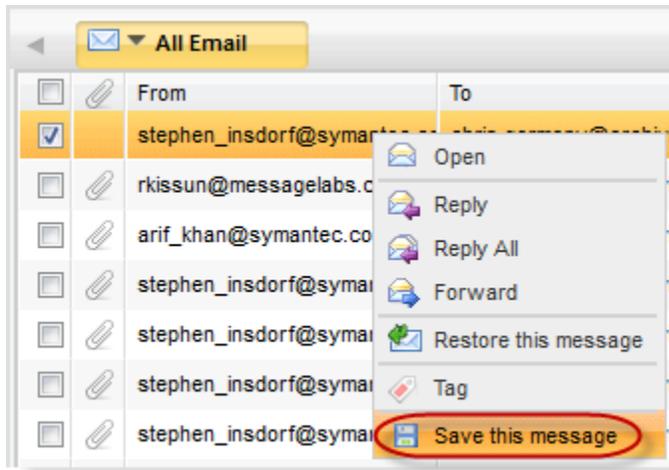


### Save Emails

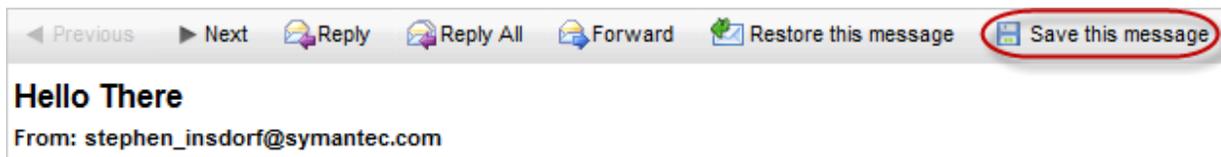
You can download and save the copies of your email stored in Personal Archive in Outlook (.msg) file format.

To save an email

1. Right-click on the email you want to save and select Save this message.



✔ You can also save an email from the message preview pane.



2. Select an option to Open or Save the email in the File Download dialog that displays for your web browser.

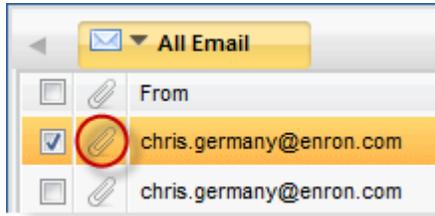
### Download Attachments

You can open or save attachments from the copies of your email stored in Personal Archive.

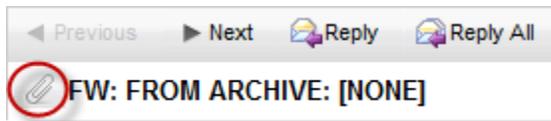
To download an attachment

1. Select an email with an attachment.

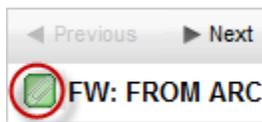
❗ Emails with attachments are denoted by  in the message list.



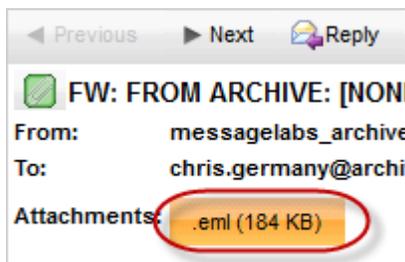
2. Click  in the message preview pane to display attachments.



 The Attachment icon turns green when attachments are displayed.



3. Select the attachment you want to download.



4. Select an option to Open or Save the attachment in the File Download dialog that displays for your Web browser.

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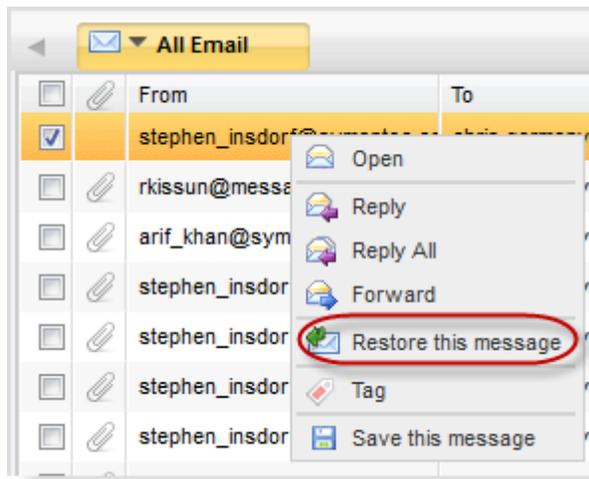
### Restore Emails

While working with the copies of your emails in the archive, you may find an email that you want to see in Outlook. You can use the Restore feature in Personal Archive to send an exact copy of the email back to your Inbox. The restoration process only takes a few seconds to complete. The restored email

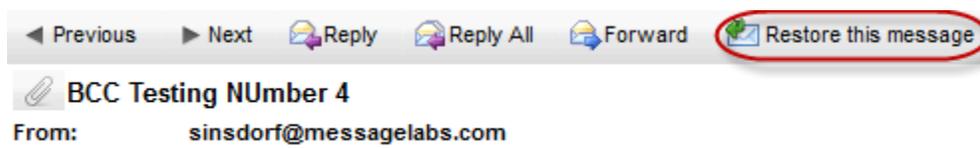
appears in the top of your Inbox with the date and time you restored the email. You can see the original timestamp of the email by opening it in your Outlook Inbox.

### To restore an email

Right-click on the email you want to restore and select Restore this message.



✔ You can also restore an email from the message preview pane.



✔ If the message you restored does not appear in your Inbox, check your other message folders if you use mail rules or check your junk email folder.

### Tag Emails

You can use tags to identify specific types of emails. You can also use saved tags as search filters. When you enable search filters, saved tags display in the Search Filter pane. See Filter Search Results for more information.

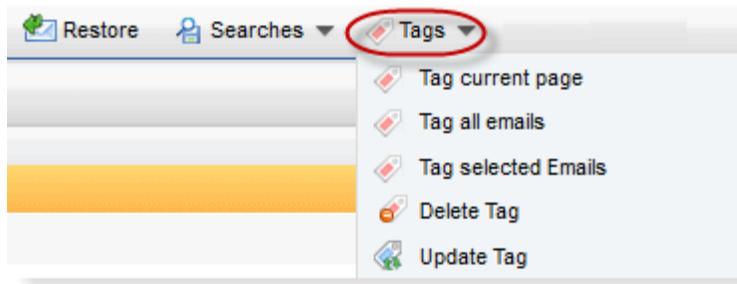
**i** Tags do not alter the original email; Personal Archive only uses tags within the archive to help you find emails more quickly at a later time.

To tag an email

1. Select an email.

**✓** You can also select multiple emails to apply the tag to those emails.

2. Click Tags in the toolbar.



3. Select one of the following options. The Add Tag window displays.

Option	Description
Tag current page	Applies a tag to all emails on the current page.
Tag all emails	Applies a tag to all emails.
Tag selected	Applies a tag to emails with checkboxes selected.
Delete Tag	Allows you to delete existing tags.
Update Tag	Allows you to edit existing tags.

4. Select an existing tag to update or create a new tag in the Add Tag window.

✖
Add Tag

Saved Tags

Retention Tags

New Tag

Comments

Refer to the following table for more information:

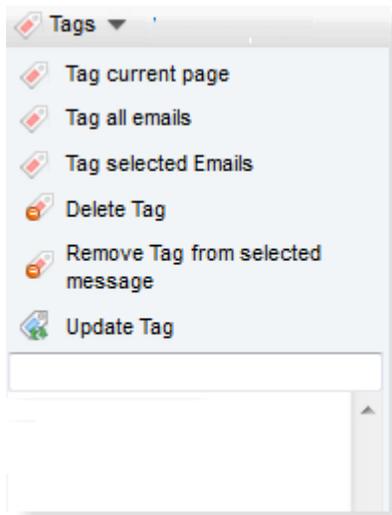
Saved Tags	Select this option to update a saved tag.
Retention Tags	This option is not available for individual updates.
New Tag	Select this option to create and apply a new tag. Enter a name for the new tag after you select this option.
Comments	Enter a comment for the new tag.

Legal Hold Tag	This option is not available to individual users.
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⚠ When you select Saved Tags or Retention Tags, Personal Archive updates the tags by applying it to the selected emails. The selected tag will no longer be applied to emails selected previously if they are not currently selected.

5. Click Add.

✔ To view emails with a tag applied, click Tags in the toolbar and select the tag.



### Using Personal Archive Search

Personal Archive's Quick Search and Advanced Search features allow you to quickly and easily search your archive for emails or attachments. Quick Search allows you to search your archive for specific emails using a variety of search terms including names and email addresses. Advanced Search allows you to customize your search using a variety of search criteria including subject, sender, recipient, mail direction, attachment type, or date. Additionally, you can use Search Filters to further refine your search results or save searches for use at a later time.

### To use Quick Search

Enter a search term in the Content field of the toolbar and click .

Content:   

✔ You can include "OR," "NOT" or wildcard phrases to create a more detailed search. See Search Tips for more information.

ℹ Similarly to most search engines, the Personal Archive search engine automatically adds "AND" conditions between search terms entered to help limit the number of search results returned.

To use Advanced Search

1. Click  in the toolbar. The Advanced Search filters display.

Content:   

2. Enter your search criteria. You can use any combination of the search criteria fields.

Content:      New  Restore  Searches  Tags

Subject:  Mail Direction:  Sent Date:

From...  Has Attachment:

To...  Attachment Type: 

Refer to the following table for more information:

Search Criteria	Description
Content	Enter a keyword or phrase.
Subject	Enter the subject of the email.
From	Enter the name or email address of the email sender.

To	Enter the name or email address of the email recipient. You can enter a name or an email address.
Mail Direction	Click ▼ and select an option. You can select to search all emails, incoming emails, or outgoing emails.
Has Attachment	Select the checkbox to search for an email with an attachment.
Attachment Type	Enter the attachment type if you selected the Has Attachment checkbox. See Search Guidelines for a list of supported attachment types.
Sent Date	Click ▼ and select a date option. Select Custom Date to enter a date range.

3. Click  .

### Search Guidelines

Search terms are not case sensitive.

You do not need to enter “and” between search terms.

Common words, also called stop words, are dropped from searches.

Stop Words
a, an, and, are, as, at
be, but, by
for, if
in, into, is, it
no, not

of, on, or  
 such  
 that, the, their, then, there, these, they, this, to  
 was, will, with

Special characters and punctuation are interpreted as plain text and omitted from searches.

Personal Archive indexes the contents of attachments and allows you to search for specific attachments and/or search terms contained within attachments.

Refer to the following table for a list of supported attachment types:

File Extension	Attachment Type
.xls	Microsoft Excel Spreadsheet 2000-2003
.xlsx	Microsoft Excel Spreadsheet 2007-2010
.doc	Microsoft Word document 2000-2003
.docx	Microsoft Word document 2007-2010
.pdf	Adobe Acrobat files
.ppt	Microsoft PowerPoint presentation 2000-2003
.pptx	Microsoft PowerPoint presentation 2007-2010
.txt	Text files
.htm	HTML files
.html	HTML files

.pps	Microsoft PowerPoint slides
.zip	ZIP archives

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### Search Tips

Enter multiple search terms to find more relevant results — search for employee benefits sent from hr@acme.com instead of benefits to narrow search results.

Enter an upper case OR between two search terms to find emails with either search term — enter sick OR vacation to find emails that contain the words sick or vacation.

Use quotation marks to find an exact phrase — enter "cloud computing" to find emails with this exact phrase.

Enter an asterisk at the end of search terms to find similar words — enter comp\* to find emails with the words computer, computing, or company.

Enter a question mark in the middle of search terms to find similar words — enter te?t to find emails with the words test or text.

Enter NOT between search terms to exclude specific words — enter compliance NOT laws to find emails with the word compliance that do not include the word laws. You cannot begin a search term with NOT because Personal Archive does not return negative searches.

Enter two search terms in quotation marks followed by a tilde and a numerical value to perform a proximity search — enter "sick approved"~5 to find emails with the words sick and approved within five words of each other. An example result for this search would be Your requested sick day from October 31 is approved.

Enter full email addresses to narrow search results — enter sallybrown@acme.com in the From field of the Advanced Search filters to find emails sent by Sally Brown.

Use quotation marks to find full names — enter "Sally Brown" in the To field of the Advanced Search filters to find emails sent to Sally Brown.

## Filter Search Results

After you use a Quick Search or Advanced Search to find emails in your archive, you can enable Search Filters to further refine your search results. Search Filters that you can apply to search results include Sender, Years, Tags, or Attachments.

To use Search Filters

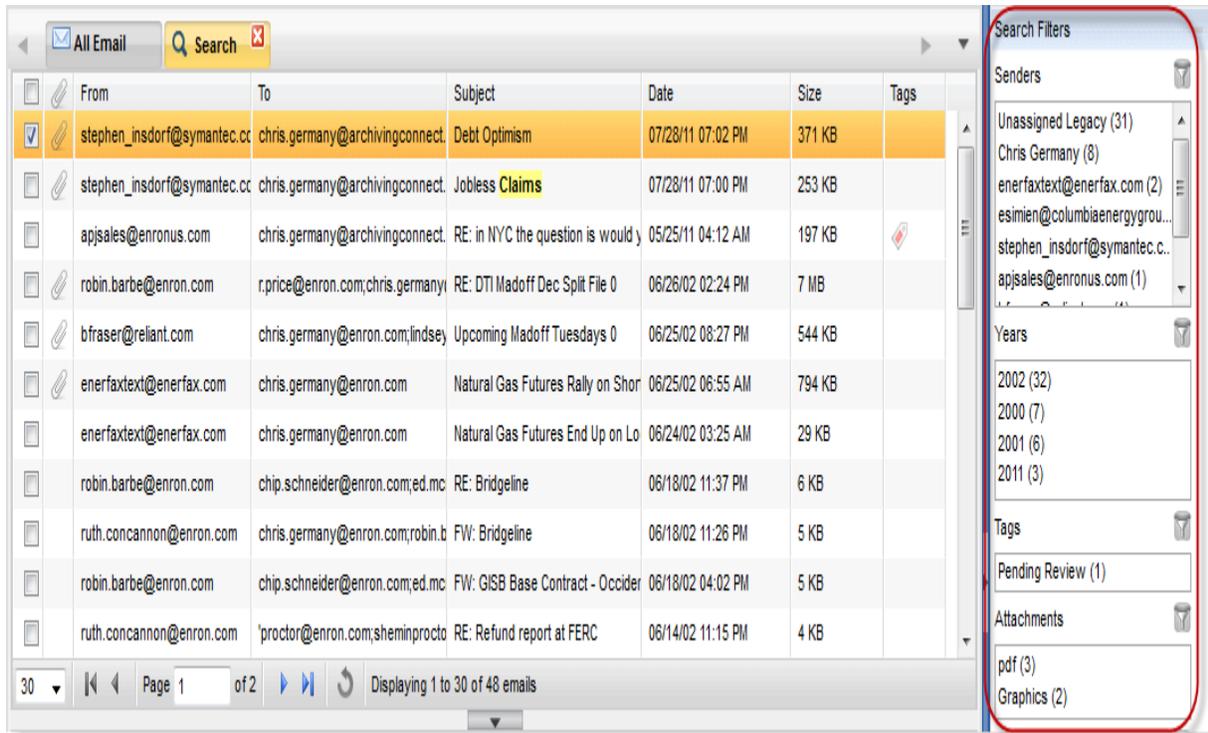
1. Click  in the toolbar.



-  The Search Filter icon turns green when enabled.



2. Enter a search term in the Content field of the toolbar and click . The Search Filter pane displays.



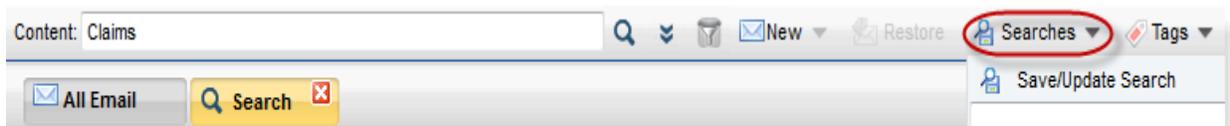
3. Click  for a category in the Search Filter pane to apply the filter to your search results.

### Save Search Results

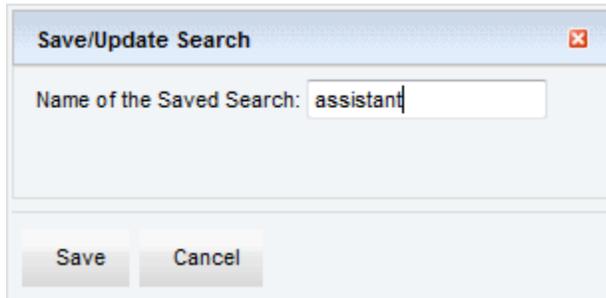
You can save searches to help you quickly find new items that match the search criteria you specified.

To create a Saved Search

1. Click Searches in the toolbar and select Save/Update Search. The Save/Update Search window displays.

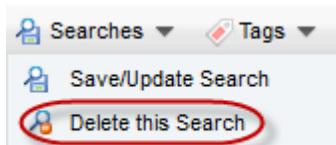


2. Enter a name for the search and click Save.



✔ You can update a Saved Search by entering the name of the search in the Save/Update Search window and clicking Save.

✔ Click Searches and select Delete this Search to delete a Saved Search. This option only displays when you have a Saved Search opened.



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To reply to an email

Click Reply or Reply All in the toolbar above the message pane. A new email opens in its own tab.



✔ You can also right-click on a message and select Reply or Reply All to reply to emails.

To forward an email

Click Forward to forward an email in Personal Archive. A new email opens in its own tab.

✔ You can also right-click on a message and select Forward to forward emails.

✔ You can also reply to or forward an email from the message preview pane.

