

Symantec Enterprise Vault™

Guide for Microsoft Outlook 2003/2007
Users

9.0

Symantec Enterprise Vault: Guide for Microsoft Outlook 2003/2007 Users

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Symantec Corporation
350 Ellis Street, Mountain View, CA 94043

<http://www.symantec.com>

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Introducing Symantec Enterprise Vault

This chapter includes the following topics:

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

About Enterprise Vault and your Outlook mailbox

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, forward and 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 forward them or reply to them, or to perform other actions.

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 for Outlook users

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.

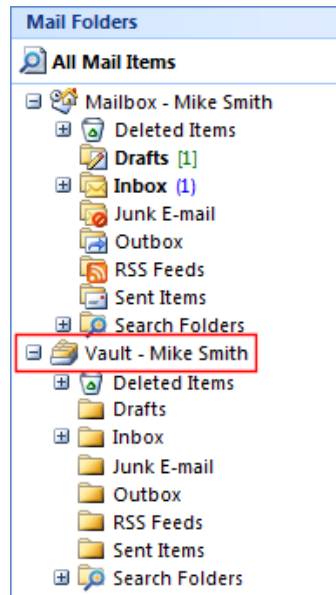
If your Vault Cache stores partial archived items, Enterprise Vault retrieves the full content from your online vault when it is required. For example, Enterprise Vault retrieves the full content of an archived item when you open the item from Virtual Vault. The type of Vault Cache (that is, whether 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 for Outlook users

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.

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.

Depending on how your administrator has set up Enterprise Vault, you may be able to move items into your vault for archiving. If you have permission to move items into your vault, the Virtual Vault 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 or changing a flag for follow up, and so on.
- All items in your Virtual Vault have a status of read.
- 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 with Enterprise Vault

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.
- Display or change the Enterprise Vault properties for a folder or item.

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 administrator can lock the setting that controls the archiving strategy so that you cannot change it.

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.

Enterprise Vault may prompt you to choose from a list of available retention categories when you store items in a vault. If none of the categories is appropriate, ask your administrator to create a new one for you.

How Enterprise Vault calculates the start of the retention period for an item normally depends on the type of item. The start of the retention period is typically the received date for mail messages and the last-modified date for documents. However, your administrator may have set up Enterprise Vault so that the start of the retention period is the date on which the item was archived.

Setting up Enterprise Vault

This chapter includes the following topics:

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

About setting up Enterprise Vault in Outlook

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 your 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.

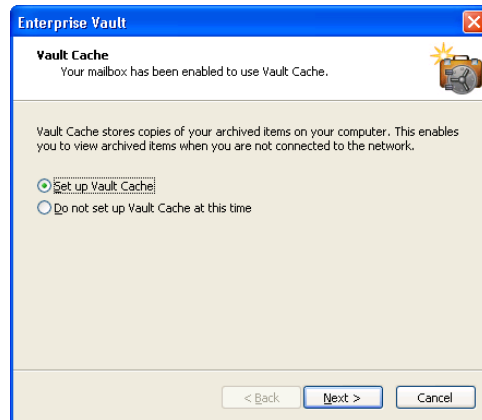
You do not need to perform any further setup for Virtual Vault. When the first synchronization is complete, your Virtual Vault normally appears in the Outlook Navigation Pane. If it does not appear, you can choose an option to display it.

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

To set up a Vault Cache

- 1 On the **Tools** menu, click **Enterprise Vault > Enable Vault Cache**.

The Vault Cache wizard appears.



- 2 On the first page of the Vault Cache wizard, select **Set up Vault Cache**, and then click **Next**.
- 3 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**.

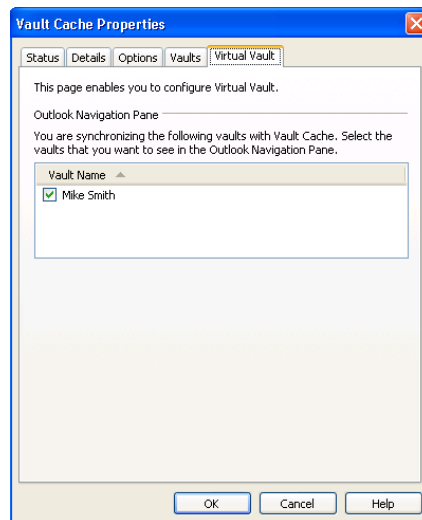
- 4 On the final page, click **Finish** to start synchronization.

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 On the **Tools** menu, click **Enterprise Vault > Vault Cache Properties**.
- 2 On the **Virtual Vault** tab, check or uncheck your vault name to show or hide it in the Outlook Navigation Pane.



- 3 Click **OK**.

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

Turning off your 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 In Outlook, click **Tools > Options**.
- 2 Click the **Other** tab.
- 3 Click **AutoArchive**.
- 4 Uncheck **Run AutoArchive every *n* days**.
- 5 Click **OK** twice.

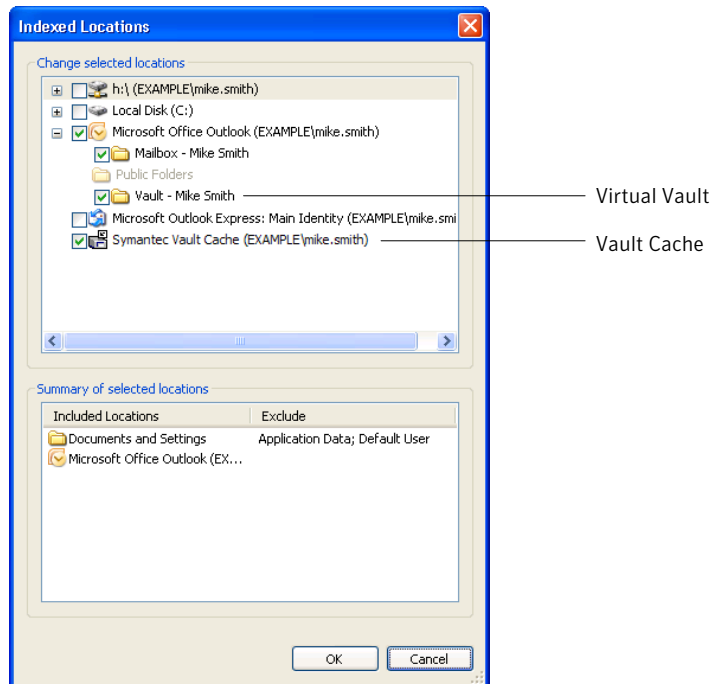
Configuring your Windows Search

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 commands and mailbox icons

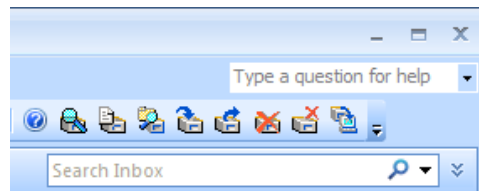
This chapter includes the following topics:

- [Enterprise Vault commands and toolbar buttons](#)
- [Enterprise Vault Outlook mailbox icons](#)

Enterprise Vault commands and toolbar buttons









Depending on how your administrator has set up Enterprise Vault, a number of commands may be available on the **Tools > Enterprise Vault** menu in Microsoft Outlook. These commands may also be available as buttons on the Outlook Standard toolbar.

Figure 3-1 Enterprise Vault toolbar buttons



[Table 3-1](#) lists all the available commands and toolbar buttons.



Table 3-1 Enterprise Vault commands and toolbar buttons

Command	Button	Description
Search Vaults		Search for archived items in the available vaults. See “Searching for your archived items” on page 22.
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.
Archive Explorer		Display a tree view of the items in your vault.
Store in Vault		Archive the selected items. You can only use this command or button on items in the mailbox, and not on items in Virtual Vault. See “Storing your items manually” on page 25.
Restore from Vault		Restore the items that are associated with the selected Enterprise Vault shortcuts. You can only use this command or button on items in the mailbox, and not on items in Virtual Vault. See “Restoring your archived items” on page 28.
Delete from Vault		Delete archived items. You can only use this command or button on items in the mailbox, and not on items in Virtual Vault. See “Deleting your archived items” on page 22.
Cancel Archiving		Cancel an archiving operation that is currently in progress. You can only use this command or button on items in the mailbox, and not on items in Virtual Vault. See “Canceling your archiving operations” on page 30.
Synchronize Vault Cache		Synchronize your Vault Cache with your online vault. See “Synchronizing your Vault Cache” on page 31.

Enterprise Vault Outlook mailbox icons

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

Table 3-2 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.

Working with archived items

This chapter includes the following topics:

- [Viewing your archived items](#)
- [Searching for your archived items](#)
- [Replying to and forwarding your archived items](#)
- [Deleting your archived items](#)
- [Sharing the items in your vault](#)

Viewing your 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 your 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 Click **Search Vaults** on the toolbar or, on the **Tools** menu, click **Enterprise Vault > 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 your 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 or forward an archived item

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

Note that you can forward multiple archived and non-archived items at once.
- 2 Use any of the normal Outlook actions to reply to or forward the items.

Deleting your 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 Click **Delete from Vault** on the toolbar or, on the **Tools** menu, click **Enterprise Vault > Delete from Vault**.
- 3 Click **Yes** to confirm that you want to delete both the shortcuts and the archived items.

To delete an item that you have opened from a shortcut

- 1 Click **Delete** on the toolbar of the opened item's window.
- 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 toolbar or on the right-click menu, click the Outlook option **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 toolbar, click the Outlook option **Delete**. Or, on the right-click menu, click the Outlook option **Delete "folder name"**.
- 3 In the prompt window that appears, click **Yes** to confirm the deletion or **No** to cancel it.

Sharing the items in your vault

Unless you specify otherwise, your vault is not accessible to other users. Only you can store items in your vault, search for items in it, and restore items from it. However, you can grant other users access to your vault or to selected folders in the vault. To do this, you must set access permissions on your Outlook folders. Enterprise Vault then automatically applies the same permissions to the folders in the vault.

To share the items in your vault

- 1 In your mailbox, right-click the required folder and then click **Properties**.
- 2 Click the **Permissions** tab, and then add the user to whom you want to give access.
- 3 Assign the required permissions to the user as follows:

To let the other user see your vault in Virtual Vault or Archive Explorer	Give the user Folder Visible permission on your mailbox (top level).
---	--

To let the other user use Virtual Vault or Archive Explorer to browse to a folder	Give the user Folder Visible permission on any parent folders and on your mailbox as a whole.
---	---

If you give another user delegate access to your mailbox, you may want to let the user archive and restore items. If so, you must give the user Editor permissions on the folders in your mailbox.

Storing and restoring items

This chapter includes the following topics:

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

Storing your 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 the Enterprise Vault options 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 options. You can only store these items if your administrator has enabled archiving of Exchange managed folders.

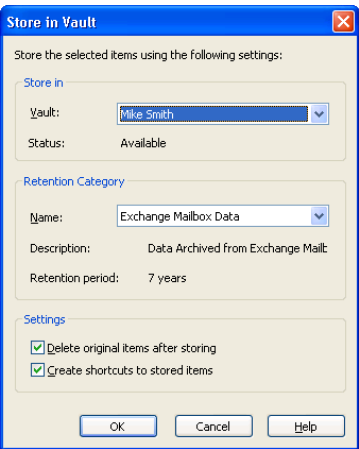
Note that you cannot modify the contents of Exchange managed folders in your Virtual Vault.

The vault, retention category, and settings in the first procedure that is described here apply to all the selected items. If any of these settings is unavailable, your administrator has locked it.

To store items using Enterprise Vault options

- 1
- In your mailbox, select one or more items to store.
- 2
- Click **Store in Vault** on the toolbar or, on the **Tools** menu, click **Enterprise Vault > Store in Vault**.

The Store in Vault dialog box appears.



- 3
- Click the **Vault** arrow, and then select the vault in which to store the items.
- 4
- Click the Retention Category **Name** arrow, and then select a retention category.
- 5
- Check or uncheck the following settings:

Delete original items after storing

Deletes the original item from your mailbox after it has been stored. We recommend that you select this option to keep as much free space as possible in your mailbox.

Create shortcuts to stored items

If you also select **Create shortcuts to stored items**, an Enterprise Vault shortcut to the original item is created when the item has been stored. The original is deleted from your mailbox. You can view or restore the original item from the Enterprise Vault shortcut.

Specifies whether an Enterprise Vault shortcut to each of the stored items is created.

- 6
- Click **OK**.

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 to Folder** and select a Virtual Vault folder in the Move Items dialog box.
- To copy the items, hold down **Ctrl** and drag them into the Virtual Vault folder where you want to store them.

Storing your 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 Enterprise Vault options in Outlook to store a folder. You can also move or copy a folder to your Virtual Vault to store it.

The following Enterprise Vault folder settings are obeyed when you store a complete folder:

- Vault
- Retention Category
- Create shortcut to archived item after archiving
- Delete original item after archiving
- Archive unread items

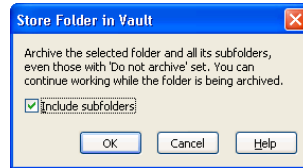
The following settings are ignored when you store a complete folder:

- Do not archive this folder
- Do not archive this item

To store a folder using Enterprise Vault options

- 1 Select the folder to store.
- 2 Click **Store in Vault** on the toolbar or, on the **Tools** menu, click **Enterprise Vault > Store in Vault**.

The Store Folder in Vault dialog box appears.



- 3 Check or uncheck **Include subfolders**.
- 4 Click **OK**.

To store a folder using Virtual Vault

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

Restoring your 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. You can restore items from shortcuts to the current folder (where the shortcuts are) or to a special Enterprise Vault folder that is called Restored Items. If the Restored Items folder does not exist, Enterprise Vault automatically creates it. You can also choose to delete the shortcuts when the items have been restored.

- By using the normal Outlook actions to copy or move the items from your Virtual Vault to your mailbox.

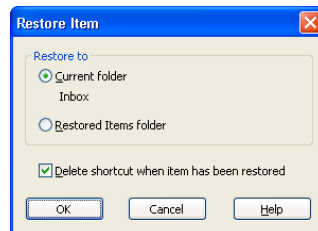
If you want to restore items to a public folder, you must have Owner access to the folder. If you do not have Owner access, you can copy a shortcut from a public folder to your mailbox. Then you can restore the item to your mailbox.

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 Click **Restore from Vault** on the toolbar or, on the **Tools** menu, click **Enterprise Vault > Restore from Vault**.

The Restore Items dialog box appears.



- 4 Select the settings that you require. For details of the settings, click **Help** in the Restore Item dialog box.
- 5 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.

Canceling your archiving operations

If an item in your mailbox has a status of pending archive, you may be able to stop Enterprise Vault from archiving it.

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

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

To cancel an archiving operation

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

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

- 2 Click **Cancel Archiving** on the toolbar or, on the **Tools** menu, click **Enterprise Vault > Cancel Archiving**.

Managing Enterprise Vault archiving

This chapter includes the following topics:

- [Synchronizing your Vault Cache](#)
- [Viewing and changing your Vault Cache properties](#)
- [How Enterprise Vault sets your folder properties](#)
- [Setting the Enterprise Vault properties of a mailbox or folder](#)
- [Setting the Enterprise Vault properties of an item](#)
- [Suspending or enabling archiving for your mailbox](#)
- [Suspending archiving for an item](#)

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.

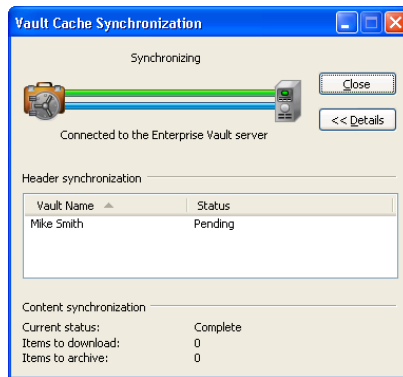
- Synchronize your Vault Cache with additional vaults to which you have access.

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

To synchronize your Vault Cache

- ◆ Click **Synchronize Vault Cache** on the toolbar or, on the **Tools** menu, click **Enterprise Vault > Synchronize Vault Cache**.

The Vault Cache Synchronization dialog box appears.

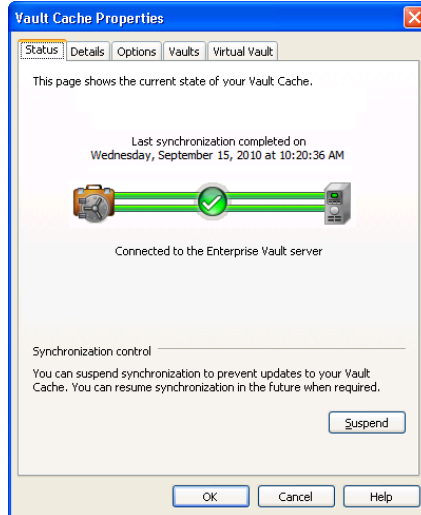


The Vault Cache Synchronization dialog box provides summary information about the synchronization process. You can close the dialog box while synchronization is in progress, and continue to work with Outlook.

To suspend or resume synchronization

- 1 On the **Tools** menu, click **Enterprise Vault > Vault Cache Properties**.

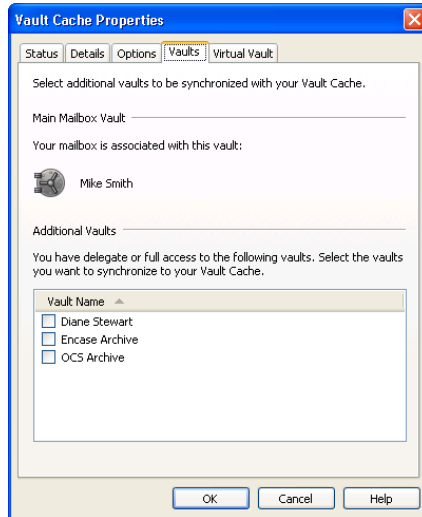
The Vault Cache Properties dialog box appears.



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

To choose additional vaults to synchronize with

- 1 On the **Tools** menu, click **Enterprise Vault > Vault Cache Properties**.
- 2 In the Vault Cache Properties dialog box, click the **Vaults** tab.



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

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

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

Viewing and changing your 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

- ◆ On the **Tools** menu, click **Enterprise Vault > Vault Cache Properties**.

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.

How Enterprise Vault sets your folder properties

By default, all folders in your mailbox have the Enterprise Vault property **Use parent folder settings** selected. This means that all folders inherit the Enterprise Vault archiving settings, retention category, and vault that are set up for your mailbox. Until you change the values for a particular folder, Enterprise Vault archives all items with the same retention category and stores them in the same vault.

You can override the parent folder settings by changing the Enterprise Vault properties for a folder. If a folder contains other folders, those folders also inherit the properties of the parent folder unless you change them.

For example, you may have a folder called Accounts Paid with a retention category of Finance. By default, all subfolders in Accounts Paid use the same retention category. To use a different retention category for one of the subfolders in Accounts Paid, you must change the Enterprise Vault properties for that subfolder.

Setting the Enterprise Vault properties of a mailbox or folder

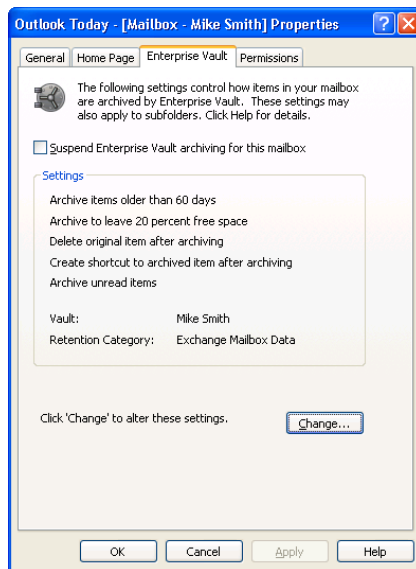
You may be able to change the archiving settings for a mailbox, mailbox folder, or public folder. Among the settings that you can change, if you have the required permissions, are the following:

- The vault in which Enterprise Vault stores items.
- Whether Enterprise Vault archives the items in this mailbox or folder.

- The default retention category to assign to the items in your mailbox or the specified mailbox folder.
- The criteria that Enterprise Vault uses to select items to archive.
- Whether Enterprise Vault automatically creates shortcuts to the items that it archives.

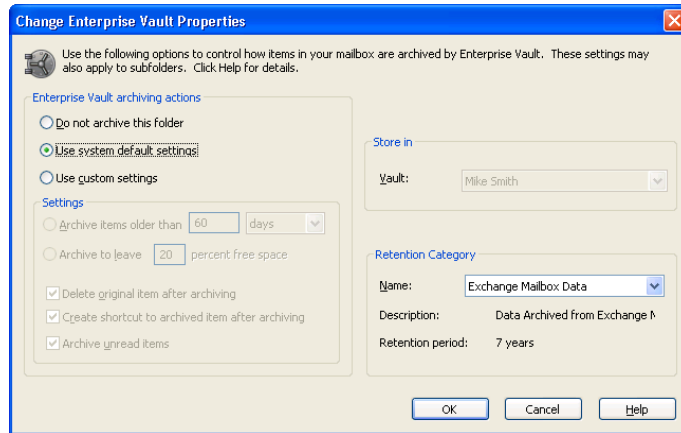
To set the Enterprise Vault properties of a mailbox or folder

- 1 In the Outlook Navigation Pane, right-click the mailbox or folder and then click **Properties**.
- 2 In the properties dialog box, click the **Enterprise Vault** tab to display the current settings.



3 Click **Change.**

The Change Enterprise Vault Properties dialog box appears.



4 Choose the required options. The available options vary according to the selected mailbox or folder. Your administrator may have locked the settings to prevent you from changing them.

For a description of each option, click **Help** in the Change Enterprise Vault Properties dialog box.

5 Click **OK.**

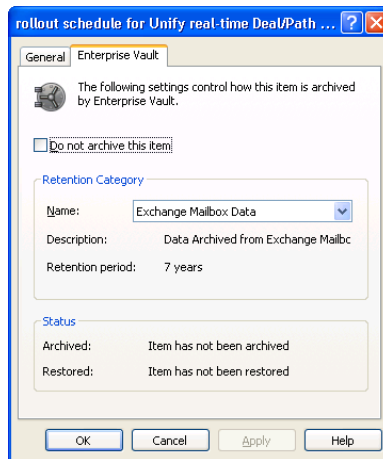
Setting the Enterprise Vault properties of an item

Depending on how your administrator has set up Enterprise Vault, you may be able to change the properties of archived items. In particular, you may have the option to change the retention category that Enterprise Vault assigns to the item. You may even be able to prevent Enterprise Vault from archiving individual items.

To set the Enterprise Vault properties of an item

- 1** Open the item whose properties you want to set.
- 2** Do one of the following:
 - If you use Outlook 2003: On the item's **File** menu, click **Properties**.
 - If you use Outlook 2007: Click the Office button in the upper-left corner of the item, and then click **Properties**.

- 3 In the properties dialog box, click the **Enterprise Vault** tab.



- 4 Do one or more of the following:
 - To suspend or enable archiving for the item, check or uncheck **Do not archive this item**.
 - To change the retention category that is assigned to the item, choose the required category in the **Retention category** list.

We recommend that you keep items with the same retention category in the same folder. Keeping them in the same folder lets you assign the retention category to the folder. The retention category then applies to all the items in the folder.
- 5 Click **OK**.

Suspending or enabling archiving for your mailbox

When you first use Enterprise Vault, everything is usually set up so that Enterprise Vault archiving can start immediately. If you choose to suspend this automatic archiving, you can still choose to store items yourself.

If you want to suspend archiving for an individual mailbox folder, you can do so by editing the Enterprise Vault properties of the folder.

Administrators who want to prevent suspension of archiving may lock the setting that is described here.

To suspend or enable archiving for your mailbox

- 1 In the Outlook Navigation Pane, right-click your mailbox and then click **Properties**.
- 2 In the properties dialog box, click the **Enterprise Vault** tab.
- 3 Check or uncheck **Suspend Enterprise Vault archiving for this mailbox**.
- 4 Click **OK**.

Suspending archiving for an item

In some circumstances, you may want to prevent Enterprise Vault from archiving a particular mailbox item.

To suspend archiving for an item

- 1 Open the item by double-clicking it.
- 2 Do one of the following:
 - If you use Outlook 2003: On the item's **File** menu, click **Properties**.
 - If you use Outlook 2007: Click the Office button in the upper-left corner of the item, and then click **Properties**.
- 3 In the properties dialog box, click the **Enterprise Vault** tab.
- 4 Select **Do not archive this item**.

If this setting is unavailable, your administrator has locked it.

- 5 Click **OK**.

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