

Enterprise Vault™

Guide for Notes Users

12.3

Enterprise Vault™: Guide for Notes Users

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Introducing Veritas Enterprise Vault

This chapter includes the following topics:

- [About Veritas Enterprise Vault and your Notes mail database](#)
- [Enterprise Vault commands in Notes](#)
- [Enterprise Vault icons in Notes](#)
- [About retention of archived items](#)

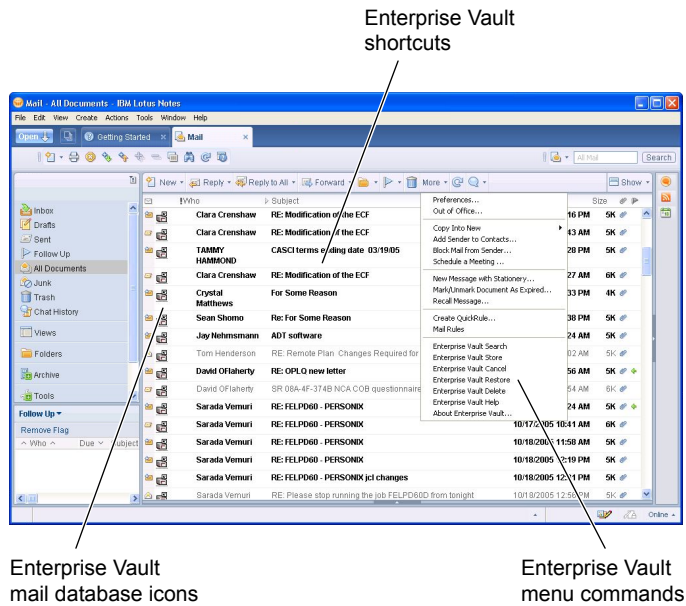
About Veritas Enterprise Vault and your Notes mail database

Enterprise Vault automatically moves items from the folders in your Notes mail database to a 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 items, they remain available to you in Notes. Most administrators set up Enterprise Vault so that there is a *shortcut* in your mail database to each archived item. A shortcut replaces the item in the mail folder and provides instant access to the archived item.

For example, [Figure 1-1](#) shows a mail database that contains multiple shortcuts to archived items.

Figure 1-1 Enterprise Vault features in Notes



A shortcut looks like the original item and behaves in a similar way. So, you can open an email from its shortcut, forward and reply to the email, and copy or move it to another folder. You can double-click the shortcut to view the contents of the original item.

Although archiving is automatic, your administrator may have set up Enterprise Vault so that you can choose to do one or both of the following:

- 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.
- Restore archived items; that is, move or copy archived items back into your mail database in their original format. You do not need to restore archived items to forward them or reply to them, or to perform other actions.

Normally, items are archived from all folders in your mail database except the Trash folder. As Enterprise Vault does not archive the Trash folder, you should empty this folder regularly.

If you have a local mail replica for offline work, Enterprise Vault can create a Vault Cache database for you locally, in addition to your online vault. By double-clicking a shortcut in the local mail replica, you can fetch the associated archived item from your Vault Cache.

Enterprise Vault commands in Notes

Depending on how your administrator has set up Enterprise Vault, the following commands may be available on the **Tools** menu or **More** menu.



Table 1-1 Enterprise Vault commands in Notes

Command	Description
Enterprise Vault Search	Searches for archived items in the available vaults. See “Searching for your archived items” on page 10.
Enterprise Vault Store	Instructs Enterprise Vault to archive the selected items when it next performs an archiving operation on your mail database. See “Storing your items manually” on page 9.
Enterprise Vault Restore	Restores the items that are associated with the selected Enterprise Vault shortcuts. See “Restoring your archived items” on page 10.
Enterprise Vault Delete	Deletes archived items. See “Deleting your archived items” on page 11.
Enterprise Vault Cancel	Stops Enterprise Vault while it is in the process of archiving items in your vault. See “Canceling an Enterprise Vault archiving operation” on page 9.
Enterprise Vault Cache Options	If available, lets you configure Enterprise Vault so that you can access archived items while you use Notes offline. See “Setting up your Vault Cache” on page 12.
Update Vault Cache	If available, starts the downloading of items from your local mail replica to an offline Vault Cache database. See “Downloading items manually to your Vault Cache” on page 14.
Enterprise Vault Search Cache	If available, lets you search the items in an offline Vault Cache.

Enterprise Vault icons in Notes

The items in your Notes mail database may be marked with the following icons.

Table 1-2 Enterprise Vault icons in Notes

Icon	Description
	<p>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 Notes. Or you can select the shortcut and then restore the item to your mail database.</p> <p>Your administrator may have set up Enterprise Vault so that, when you double-click a shortcut, Enterprise Vault displays the properties of the archived item rather than its contents.</p>
	<p>Pending archive. Enterprise Vault has marked the item for storage in a vault.</p>

About retention of 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. For example, your administrator may specify a retention period of five years from the date on which Enterprise Vault archived the items. Alternatively, your administrator may specify that the retention period ends on a particular date, such as December 31 2021, or even specify that the items are retained forever.

Enterprise Vault deletes items in your vault when their retention period has ended.

Your administrator can set up different retention categories for different types of data, such as Business or Legal.

You can use Enterprise Vault Search to find items in your vault that have a particular retention category. Depending on how your administrator has set up Enterprise Vault, you may be able to choose the retention category that you want to assign to an item when you manually store it in your vault. You may also be able to use Enterprise Vault Search to change the retention category that is assigned to an item in your vault.

Working with your archived items

This chapter includes the following topics:

- [Viewing your archived items](#)
- [Replying to and forwarding your archived items](#)
- [Storing your items manually](#)
- [Canceling an Enterprise Vault archiving operation](#)
- [Restoring your archived items](#)
- [Searching for your archived items](#)
- [Deleting your archived items](#)

Viewing your archived items

When Enterprise Vault archives an item, it may leave a shortcut to the item in your mail database. The shortcut is a direct link to the archived item in a vault. You can easily view or restore an item from a shortcut.

Note: If there is no shortcut to an archived item, you can use the Enterprise Vault search applications to find and open the item.

See [“Searching for your archived items”](#) on page 10.

To view an archived item

- ◆ Double-click the shortcut to open its contents in the appropriate application.

Replying to and forwarding your archived items

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

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.

To store items manually

- 1 Select one or more items to store in the vault.
- 2 Click **Enterprise Vault Store** on the **Tools** menu or **More** menu, depending on your setup.
- 3 Click **OK** to confirm that you want to store the selected items in your vault.

Enterprise Vault first marks the items with the following icon to indicate that archiving is pending:



Enterprise Vault does not fully archive the items until it performs the next archiving run. Enterprise Vault then marks the items with the following icon:



Canceling an Enterprise Vault archiving operation

If an item in your mail database has a status of Pending Archive, you may be able to stop Enterprise Vault from completing the operation. However, because of the speed with which Enterprise Vault archives items, you must act quickly to cancel the operation.

To cancel an Enterprise Vault operation

- 1 Select the items that Enterprise Vault is processing.
You can include any items that Enterprise Vault is not processing. Enterprise Vault ignores such items.
- 2 Click **Enterprise Vault Cancel** on the **Tools** menu or **More** menu, depending on your setup.

Restoring your archived items

You do not normally need to restore archived items to your mail database, as you can view them easily by double-clicking their shortcuts. 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.

If you do not have a shortcut to an item that you want to restore, use the Enterprise Vault search applications to find and restore the item

To restore an archived item from an Enterprise Vault shortcut

- 1 In your mail database, select the shortcuts to the items that you want to restore. Use the normal Notes techniques to select single or multiple shortcuts. You can include any items that are not shortcuts. Enterprise Vault ignores such items.
- 2 Click **Enterprise Vault Restore** on the **Tools** menu or **More** menu, depending on your setup.
- 3 Click **OK** to confirm that you want to restore the selected items to your mail database.

The items that you restore by using shortcuts are always restored to the original folder (where the shortcuts are).

Searching for your archived items

If you have an Enterprise Vault shortcut to an archived item, you can easily use it to view or restore the item. However, if you do not have a shortcut, you can use the search facilities in Enterprise Vault to find and open the item.

To search for your archived items

- 1 Click **Enterprise Vault Search** on the **Tools** menu or **More** menu, depending on your setup.
- 2 In the logon box, type your Notes user name, Domino Web/Internet password, and Domino domain, and then click **OK**.
- 3 Enter the search criteria, and then start the search.

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.

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 **Enterprise Vault Delete** on the **Tools** menu or **More** menu, depending on your setup.

To delete an item that you have opened from a shortcut

- 1 On the toolbar of the opened item's window, click **Delete**.
- 2 If prompted, 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 vault and you can later perform a search to retrieve it.

Working offline with Enterprise Vault

This chapter includes the following topics:

- [Setting up your Vault Cache](#)
- [Downloading items manually to your Vault Cache](#)

Setting up your Vault Cache

When Enterprise Vault archives an item from your mail database, it normally leaves a shortcut that links directly to the archived item. Replacing items with shortcuts saves space in your mail database. However, when you work in a local mail replica and are disconnected from the network, double-clicking a shortcut cannot open the associated archived item. Enterprise Vault can solve this issue by retaining copies of archived items in an offline *Vault Cache*. When you are offline, you can retrieve the archived items in your Vault Cache by double-clicking the shortcuts in your local mail replica.

Your administrator can configure the Vault Cache in one of three ways:

- So that you have the option to set up the Vault Cache yourself.
- So that the Vault Cache is set up automatically, without any action by you.
- So that the Vault Cache is disabled.

When you try to open an archived item that is not available in the Vault Cache, and you are connected to the network, Enterprise Vault downloads the item from the online vault and displays it. However, if you have disconnected from the network when you try to open an archived item, Enterprise Vault prompts you to download the item when you are next online.

If your administrator has not chosen to enable Vault Caches automatically, you can set one up as follows.

To set up your Vault Cache

- 1 Start Notes.
- 2 Open your mail database.
- 3 Do the following, if you have not yet done so. For instructions on how to perform these activities, consult the Help system for Notes.
 - Create an offline copy (replica) of the mail database.
 - Open the replica of the mail database.
 - Enable scheduled local agents so that, when you start Notes, Enterprise Vault can run agents to download items to the Vault Cache.
- 4 Click **Enterprise Vault Cache Options** on the **Tools** menu or **More** menu, depending on your setup.

The **Vault Cache Options** dialog box appears.

Vault Cache Options

Vault Cache
Vault Cache Options

☐ Enable Vault Cache

Disk Usage

Disk:

☒ Percentage of Free Disk Space to use: 20 %

☐ Maximum disk space to use: 20 MB

Background Checking

Start checking after: 3 minutes

Downloading

☒ Download items automatically when online

☐ Start download manually

OK Cancel

- 5 Select **Enable Vault Cache**.

- 6 Set the remaining options, and then click **OK**.

Disk Usage	Controls the amount of disk space available for the Vault Cache. If space runs out, Enterprise Vault deletes the oldest items in the Vault Cache to make space for new items. You can modify the amount of space available as required.
Background Checking	Specifies the number of minutes to wait after Notes starts before it checks for items to download to your Vault Cache. If you have a slow connection, you may want to increase this value so that you can read mail before checking starts.
Downloading	Controls whether, when there are some items that Enterprise Vault must download to update your Vault Cache, they are automatically downloaded when you are next online. Alternatively, you can choose to start the download manually.

- 7 Click **Start** to search for items to add to your Vault Cache.

Downloading items manually to your Vault Cache

Your administrator may have set up Enterprise Vault to check automatically for new items to download to your Vault Cache when you have a network connection to your mail server. If automatic checking is not enabled, you can manually update your Vault Cache while you use your local mail replica.

To download items manually to your Vault Cache

- 1 Open your local mail replica.
- 2 Click **Update Vault Cache** on the **Tools** menu or **More** menu, depending on your setup.