



Welcome to Websense Email Archive Quick Start Guide

Nearly nine out of ten Internet users spend seven hours a week managing email. Yet, studies show that 95% of the email sitting in our inboxes will never be looked at again.

Websense Email Archive gives you an unlimited mailbox and allows you to quickly and easily access your archived email directly from Microsoft Outlook or Lotus Notes. With our cached sign-on technology, you don't have to worry about forgotten usernames and passwords.

- **Get a cleaner, smaller inbox**—there's no need to file and save everything, so you don't have to worry about mailbox quotas.
- **Delete email with confidence**—you can access anything you need in your archive, because it captures everything you send and receive.
- **Stop wasting time managing your inbox**—Email Archive's indexing function helps you find messages and attachments quickly and easily
- **Restore lost emails**—you can easily recover emails you may have lost or deleted deleted—from their desktop, laptop or BlackBerry® device

Websense Email Archive seamlessly integrates with Outlook and Notes, so it's easy to complete the most common day-to-day tasks, using a variety of familiar shortcut buttons. In addition to restoring lost or deleted emails back to your inbox, Email Archive also allows you to compose, reply to, and forward messages directly from your archives, just as you would in Outlook or Notes.

Additional features include the ability to save searches, so you can re-run them as needed, and custom tagging, to group certain emails together for future reference. You can also access your archives from Outlook Web Access, the IBM Lotus Notes Web Client, BlackBerry® devices, and through a browser-based, secure Web site, offering a convenient option for employees working from home or on the go.

Getting Started

After the Web folders are deployed, you can access your personal email archive by simply opening Microsoft Outlook (or Lotus Notes), clicking on the folder once to open it, and entering your username and password when prompted (provided to you by your system administrator). **NOTE:** With single sign-on, you are automatically logged in on all visits to your Email Archive (when accessing it via Outlook) after your initial login.

Email Archive Quick Start Guide

Email Archive allows you to easily store, search and retrieve your emails. This Quick Start Guide shows step-by-step how to use some of the key features of your archive.

1. Knowing your Role
2. Logging on to your Email Archive
3. Working in your Email Archive
4. Restoring email to your Active Mailbox
5. Searching your Email Archive
6. Filtering Search Results

At the end of the guide, we provide additional tips on searching, FAQs, best practices, and support options.

1. Knowing your role

Websense Email Archive supports customized user roles, each with a unique and customizable set of permissions. The following built-in roles are included by default:

User Accounts: All new users of the archive can be granted access to their own Email Archive, which gives them the ability to search their own historical emails.

Account Manager: This role can be customized to set up new accounts, reset passwords, and use additional privileges.

Policy Manager: The Policy Manager can view and update policy settings (for example, set time zones, specify storage of emails based on email direction).

Role Manager: The Role Manager can view and modify the privileges of other users.

Administrators: The Administrator role has all the above/available permissions.

Most likely you have been set up as a User Account. Check with your System Administrator if you require additional access.

2. Logging in to your Email Archive

To log in into your Email Archive, follow these steps:

1. Open Microsoft Outlook on your computer.
2. Click on your Email Archive folder once to open the archive. Your folder is located on the left-hand side of the screen.
3. Enter your username and password when prompted.
4. Your archived messages appear in a familiar, Outlook-like interface.

 You enter your username and password only one time when opening Email Archive through Outlook. After one successful login, you are automatically logged on on all subsequent visits to the archive.

3. Working in your Email Archive

You can view messages and attachments in your archive, as well as compose, reply to, and forward messages—just as you would in Outlook.

There are several features in Email Archive to make your experience easier, including the ability to change the organization of your messages and customize your settings.

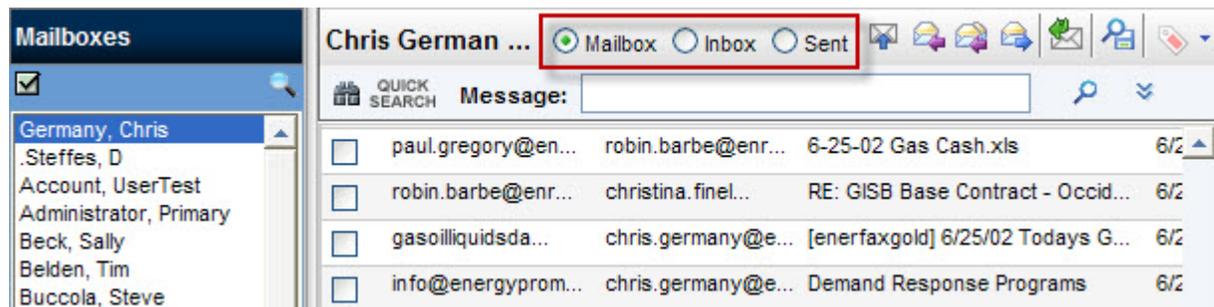
Views

You have three views to choose from:

1. **Mailbox:** displays all of your sent and received email
2. **Inbox:** displays all of your received email
3. **Sent:** displays all of your sent email

You can select your view by clicking on the circle next to the view of your choice in the upper, left-hand side of the Email Archive toolbar. A green dot appears in the circle of the current view, as seen in Figure 1 below.

Figure 1: Selecting the View of your archive



As with Outlook, your messages are displayed in a list, with the To/From, Subject, and Date information visible. You have the option to view a previous pane—regardless of which view you select.

Toolbar

The Email Archive toolbar is similar to your Outlook toolbar. Like Outlook, the toolbar is located at the top of the page and is always visible, regardless of which view you select or action you are taking.

Click on a shortcut button to complete the associated task, including:

1. Compose a new email

Click on the  icon to draft new messages to send, just as you compose and send emails in your active mailbox.

2. Reply to sender

Click on the  icon to respond to a message you received, just as you reply to an email in your active mailbox.

3. Reply to all

Click on the  icon to respond to a message you received and copy all recipients on your outgoing response, just as you reply to All in your active mailbox.

4. Forward an email

Click on the  icon to forward a message you received to additional recipients, just as you forward a message in your active mailbox.

5. Restore selected email(s)

Click on the  icon to restore an email you deleted from your active mailbox. Restoring the email sends the original message back to your Outlook inbox.

6. Save as Saved Search

Click on the  icon to save specific search criteria -- and results -- for future reference. To learn how to conduct a search, see the [Search your Email Archive](#) section below.

7. View Saved Search

Click on the  icon to review a list of your saved searches.

8. Configuration

Click on the  icon, located on the right-hand side of the toolbar, to change your password, set your time zone, and change your reading pane position (for example, selected emails can appear on the bottom of the screen or on the left-hand side of the screen).

9. Logout of Email Archive

Click on the  icon, located on the right-hand side of the toolbar, to log out of your archive and return to your standard Outlook interface.

4. Restoring email to your active mailbox

You can quickly and easily restore email you deleted from your active mailbox. Restoring the email sends the message from your archive back into your Outlook inbox. The restored email reappears at the top of your inbox.

To restore an email, follow these steps:

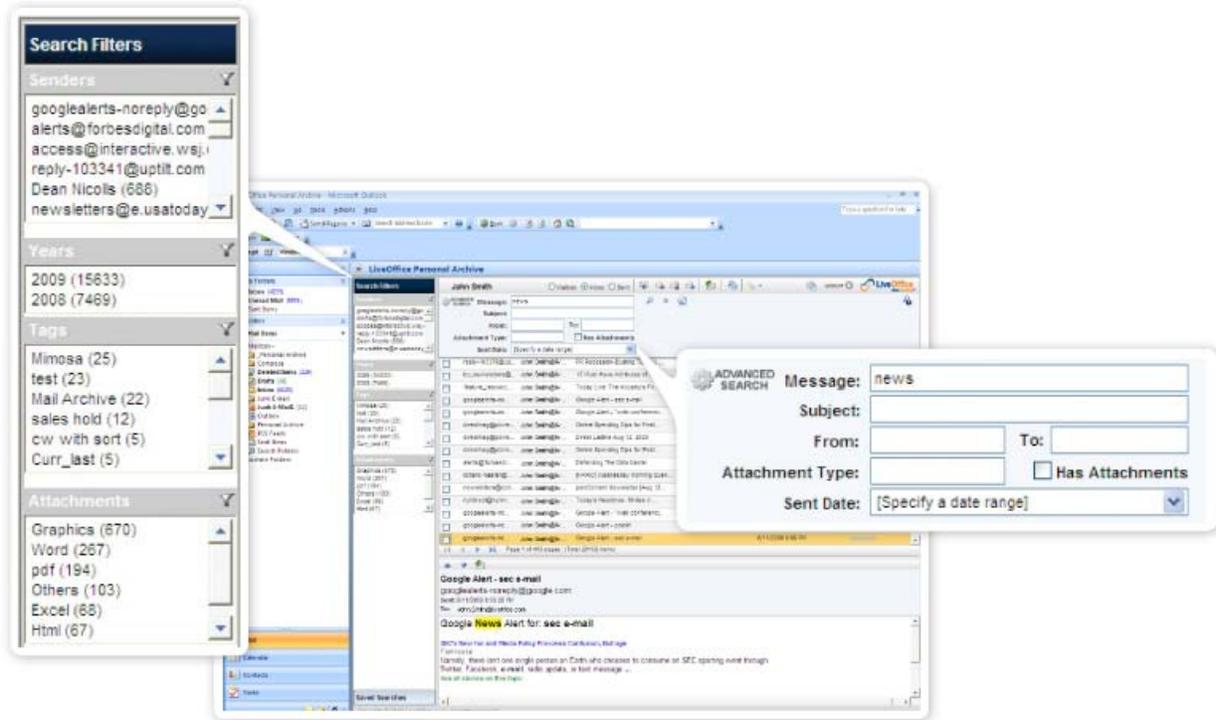
1. Open your Email Archive folder.
2. Find the email(s) you wish to restore.
3. Check the box to the left of the email(s).
4. Click the Restore Selected Email(s) icon once in the Email Archive toolbar.
5. The email(s) you selected are automatically sent back to your Outlook inbox.

5. Searching your Email Archive

You can search for specific emails and attachments two ways: Quick Search and Advanced Search.

With Quick Search, simply typing desired search terms into the Message field and clicking on the magnifying glass icon begins the search. The search results appear in a list of messages, and the search terms are highlighted in yellow in the preview pane.

The Advanced Search option gives you the ability to fine-tune your searches based on a variety of criteria, such as message keywords, to, from, subject, date(s), and attachments. Save searches for future reference by clicking on the Save as Saved Search icon in the Email Archive toolbar after completing a search.



Email Archive makes retrieving old or deleted email easy. The Advanced Search feature allows users to fine-tune their searches with key parameters. Plus, the Search Filters help further hone searches, allowing users to drill into specific categories, such as Senders, Years, Tags, and Attachments.

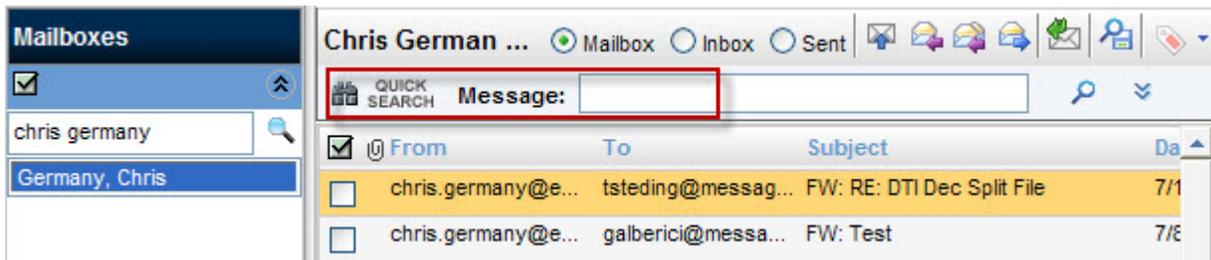
You can search for specific emails and attachments within your archive two different ways:

1. Quick Search
2. Advanced Search

Quick Search

A quick search allows you to easily and quickly search specific keyword(s) or term(s). The Quick Search field appears just under the Email Archive toolbar on the left-hand side of the screen, seen in Figure 2 below.

Figure 2: Quick Search Feature



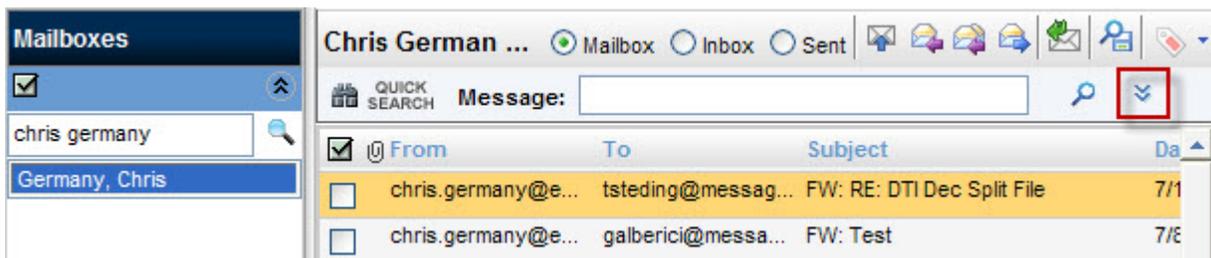
To perform a quick search, follow these steps:

1. Type your desired search terms into the Message field and click on the magnifying glass icon to begin the search.
2. The search results appear in a list of messages.
3. Your search terms, within the email message(s), are highlighted in yellow in the preview pane.

Advanced Search

An advanced search allows you to fine-tune your searches by choosing specific search criteria, such as the subject of a message or date a message was sent. The advanced search feature appears beside the quick search field, just under the Email Archive toolbar on the left-hand side of the screen, as seen in [Figure 3](#) below.

Figure 3: Advanced Search Feature



To complete an advanced search, follow these steps:

1. Click on the down arrow icon , located on the right side of the Quick Search field.
2. Fill in the criteria you want to search in the fields provided.
3. Click on the magnifying glass icon to begin the search.
4. The search results appear in a list of messages.
5. Your search terms, within the email message(s), are highlighted in yellow in the preview pane.

Filtering your Search Results

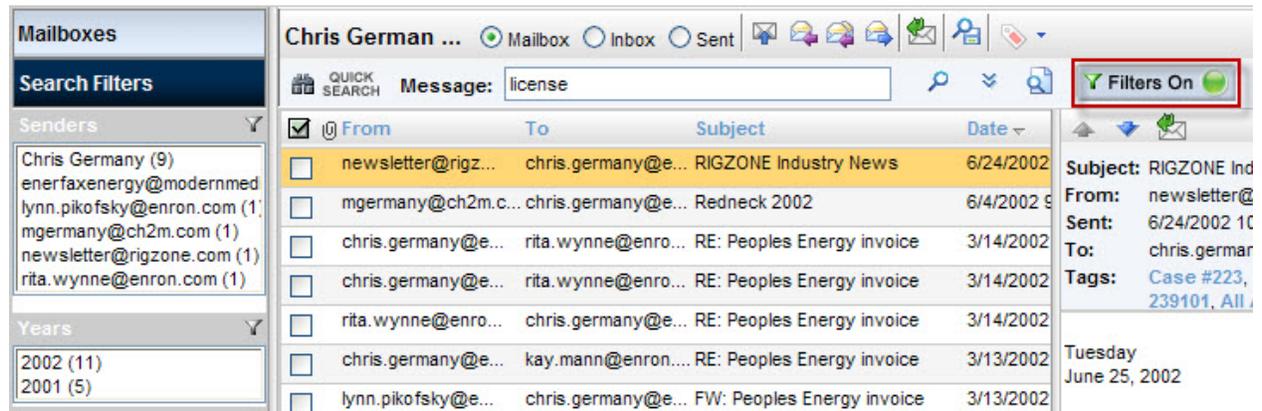
Email Archive's Search Filters offer advanced functionality to help you quickly and easily fine-tune your searches. Whether you are conducting a Quick Search or Advanced Search, overall search results are displayed (based on your search terms) along with a comprehensive Search Filter list, featuring a variety of categorized criteria, including: senders, years, tags, and attachment types.

Whether you conduct a quick search or an advanced search, both overall search results and filtered search results appear on your screen.

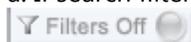
To turn on the Search Filters feature, follow these steps:

1. Conduct either a quick search or an advanced search.
2. Once search results are returned, in list form, click on the Filters icon, located on the right-hand side of the search field, as seen in Figure 4 below.

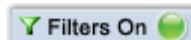
Figure 4: Turning on the Search Filter



a. If search filters are currently turned OFF, the button will be gray and read "Filters Off."



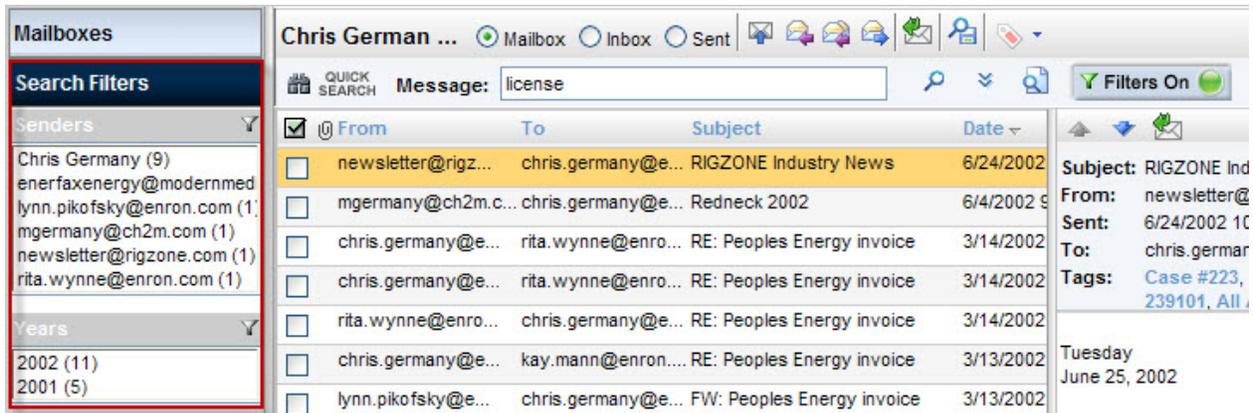
b. If search filters are currently turned ON, the button will be green and read "Filters On."



3. Suggested search filters appear in a list on the left-hand side of the page, as seen in [Figure 5](#) below. Search filters are automatic and cannot be changed. They include:

- Senders
- Years
- Tags
- Attachments
- Graphics
- Word
- PDFs
- Excel
- PowerPoint
- HTML

Figure 5: List of Search Filter criteria



4. Select any of the resulting Search Filter criteria, by selecting the "Filter" icon , located on the right-hand side of the filtered results column. You'll receive a new list of search results according to this filter.
5. You can continue to filter the subsequent results. Each new list of results will provide a new list of possible filters.
6. If you wish to select multiple suggested filters for your search results, hold down your control key while you click each individual desired filter icon.

 Once a search is completed, you can save your search criteria and results for future reference by clicking on the "Save as Saved Search" icon, located on the Email Archive toolbar.

To recall previous searches, click on the "View Saved Search icon", located on the Email Archive toolbar, and then select your Saved Search from the resulting list.

Email Archive Search Frequently Asked Questions

What content does Email Archive Search?

Email Archive searches through all of your imported mail, including attachments.

Do I need to include "and" between search terms?

There is no need to include "and" between your search terms. However, the order in which you type your search terms does affect the results. If you wish to restrict a search further, just include more search terms.

Does search automatically exclude some words?

Very common words (often called "stop words"), such as "the," "and" or "of," are usually dropped from searches because they typically don't convey much information compared to the other words in a search.

Can I search for an exact phrase?

Sometimes you may want only the results that include an exact phrase. In this case, simply put quotation marks around your search terms.

Can I conduct a wildcard search?

Use the asterisk at the end of any word to include any combination of letters that follow the prefix. For instance, the search term "herb*" will search for words such as "herbatologist", "herby", "herbs", or any other combinations following herb found in your emails and attachments.

Can I search for a specific type of document?

You can add the document extension to a search to focus on emails that contain certain kinds of attachments (such as .doc, .pdf, .xls). Additionally, Email Archive provides suggested filters to help make your searches more specific; *document types* is one of the suggested filters.

Can I search for two terms?

To find pages that include either of two search terms, add an uppercase "OR" between the terms.

Can I include "not" in a search?

A "NOT" search helps you eliminate unwanted content from your search results. For example, if you're looking for information about "compliance," but want to avoid anything about "software," you can specify your search criteria as "Compliance NOT software."

Can I use Boolean Search Logic?

By using a combination of AND, OR, and NOT, along with Phrase searches, you can construct more complicated search conditions. Here are some examples:

- Contracts: search for 'contract OR agreement AND "Acme Company" AND doc AND pdf'
- Appointments: search for 'Meeting AND "Acme Company" OR "Beta Company"'

 Email Archive Search is based on the open source Lucene index framework. Please review these Web sites for more information on Lucene searches.

http://lucene.apache.org/java/2_3_2/queryparsersyntax.html

<http://darksleep.com/lucene/>

Note that some search methods such as Fuzzy, Wildcard, and Pattern Matching are **not** supported with Email Archive at this time.

Recommended Practices

- Search times improve significantly after the first search performed by the user. This is because the indexes are kept in memory during the time the user is active.
- When Email Continuity is activated, the Restore/Reply/Reply to All/Forward/Compose options deliver messages directly and bypasses any encryption such as TLS, DLP, and the like.
- There are three views in Email Archive:
 1. The Mailbox
 2. Inbox
 3. Sent Items

The default is the Mailbox view, which looks at both Sent and Inbox (received) views. Remember which view you're on when troubleshooting a problem.

Need Help?

If you have any questions regarding your service or are experiencing an issue, please visit Websense eSupport 24 hours a day at:

<http://support.websense.com>

The Websense Support site offers access to all technical resources, including opening a case via the Service Request portal.

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