Getting started

This section includes the following topics:

- About Arctera Personal Archive
- Prerequisites
- Latest documentation, compatibility list, and release notes
- Known Issues
- Accessing the new Arctera Personal Archive portal
- Logging in
- About Email Continuity
- About legacy data
- Configuring user preferences
- Resetting a forgotten password
- About Personal Archive user interface

About Arctera Personal Archive

Arctera Unified Platform is a cloud-based archiving service that lets your organization store, manage, and discover email messages and other business-critical information. Once your organization enables the service, it journals a copy of all emails and collaboration messages you send and receive to Arctera Unified Platform. Using Arctera Personal Archive, you can work with emails and collaboration messages archived using Arctera Unified Platform.

> **Note:** Arctera Unified Platform currently does not archive calendar items, contacts, or notes.

> Arctera Personal Archive lets you perform the following actions:

- Read archived messages.
- Search for archived messages.
- Reply to and forward archived messages.

- Restore archived messages to your inbox.
- Save archived messages to your computer.
- Download message attachments.
- Print archived messages.
- Tag archived messages.
- Send new messages.

> **Note:** Your administrator may choose to make some of these actions unavailable in Arctera Personal Archive.

> By default, the message list in Arctera Personal Archive displays only your own archived messages. If your organization subscribes to Arctera eDiscovery, your administrator can assign you the reviewer role, which lets you monitor the emails and collaboration messages of other archive accounts.

For recent updates to the Arctera Personal Archive application, see Latest documentation, compatibility list, and release notes

To verify Microsoft Windows and web browsers compatibility, see Compatibility and the latest updates.

To view release wise updates, see Arctera Unified Platform Release Notes.

Prerequisites

To use Arctera Personal Archive, you need the following:

- Your Arctera Personal Archive URL or a Arctera Personal Archive web folder accessible from the Microsoft Outlook Folders pane.
- Your Arctera Unified Platform user name.
- Your Arctera Unified Platform password.
- Access permission to use Arctera Personal Archive.

> **Note:** Contact your administrator if you do not have this information or you need access permission for Arctera Personal Archive.

Latest documentation, compatibility list, and release notes

To access help documentation for Arctera Unified Platform applications (service suite), refer to Arctera Unified Platform Platform Documentation

To access the updates in the latest release, refer to the Release Notes

To confirm compatibility of the supported Microsoft Outlook versions and web browsers, refer to the Arctera Unified Platform Compatibility List.

Known issues

This section provides information about the known issues with Arctera Personal Archive.

- You may see duplicate archived messages in Arctera Personal Archive if the messages were journaled and imported as legacy data to Arctera Unified Platform.
- The Arctera Personal Archive splash screen may display indefinitely.

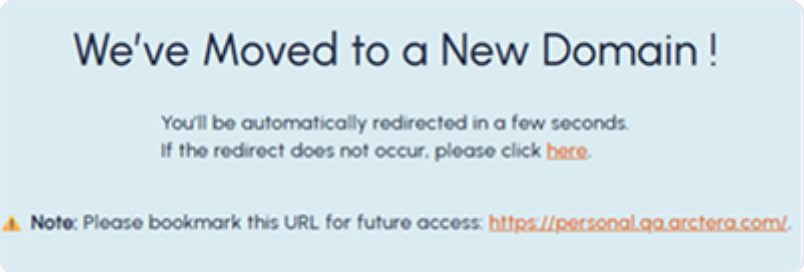
  Workaround - You can enable native XML HTTP support for your web browser if this issue occurs. For Microsoft Internet Explorer, you can find this option on the Advanced tab in the Internet Options menu.
- Some Arctera Personal Archive functionality may not be available from the Safari browser on iOS devices. We recommend that you contact your administrator about Arctera Personal Archive Mobile Web Access if you want to access your archived messages from a mobile device.

Accessing the new Arctera Personal Archive portal

Before you can access your archived messages, you must sign in to Arctera Personal Archive using your Arctera Unified Platform credentials.

To access Arctera Personal Archive, open your Arctera Personal Archive URL in a supported browser. For information about supported browsers, see Arctera Unified Platform Compatibility List.

The Arctera Personal Archive application has been available on a new domain since the April 2026 release. If you use the previous-domain URL to access the application, a redirection page appears and automatically redirects you to the current Arctera Personal Archive URL.



If the automatic redirection does not occur, click the link provided on the redirection page to continue to Arctera Personal Archive.

Do not bookmark the URL accessed through the *click here* link. Instead, bookmark the new Arctera Personal Archive URL displayed on the redirection page to avoid future access issues.

Contact your administrator if you do not know your Arctera Personal Archive URL or need permission to access the application. For more information about the domain change, see FAQs: Arctera Unified Platform SaaS URL Updates.

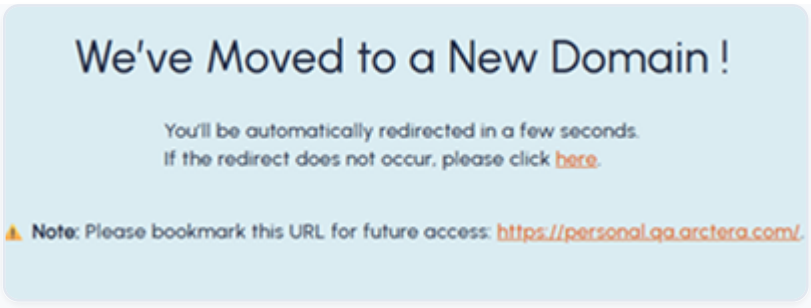
Logging in

Before you access your archived messages, you must log in to Arctera Personal Archive using your Arctera Unified Platform credentials.

To log in:

1. In a supported browser, navigate to your Arctera Personal Archive URL.

   > **Note:** Starting with this release (April 2026), the application is available on a new domain. If you access the application using a URL with the previous domain, an informational page appears.

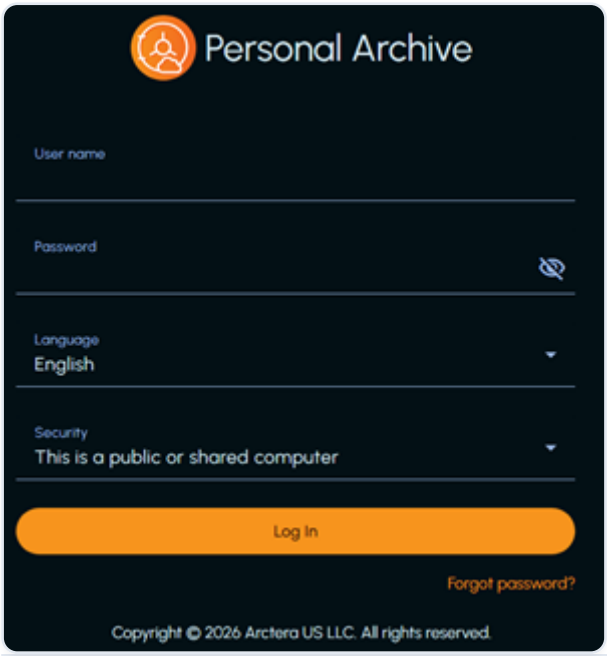
   The previously used URL is expected to automatically redirect you to the current application URL. If the automatic redirection does not occur, click the link provided on the page to continue. Do not bookmark the URL accessed through the *click here* link. To avoid future access issues, bookmark the new application URL provided in the note on the page.

Contact your administrator if you do not know your Arctera Personal Archive URL or you need access permission for Arctera Personal Archive.

For more information on supported browsers, see Arctera Unified Platform Compatibility List.

In addition, refer to FAQs: Arctera Unified Platform SaaS URL Updates.

2. On the **Login** page, do the following:



OPTION	DESCRIPTION
User name	Enter your Arctera Unified Platform user name.
Password	Enter your Arctera Unified Platform password.
Language	To change the language for the Login page, select a language from the Language drop-down menu. This setting applies only to the Login page.To change the language of the entire application user interface, update your localization settings on the **Settings** page. See Setting application preferences.
Security	- This is a public or shared computer : This option is selected by default. The application prompts you to enter your credentials each time you access the Login page and

OPTION	DESCRIPTION
	automatically signs you out after 20 minutes of inactivity.- This is a private computer : The application caches your credentials for 10 hours after a successful login, allowing you to bypass the Login page. To clear the cached credentials, log out of the application.

3. Click **Log In**.
4. If the multi-factor authentication (MFA) is enabled for you, the **OTP** field appears on the authentication screen.

   This email-based authentication and the Time-based One Time Password (TOTP) authentication enhances the access and data security of Arctera Personal Archive. Administrators have the permission to enable or disable multi-factor authentication at the user and tenant level.

   - If the **email-based authentication** (EML) is enabled for you, a one-time password (OTP) is sent to your registered email address for authentication and access to the application. This OTP remains valid for 5 minutes from the time of receiving the email.

     Manually enter the OTP on the authentication screen within 5 minutes. Copy-pasting the OTP is not allowed. If you fail to provide OTP within 5 minutes of receiving it, the application displays a message that the OTP has expired. To obtain a new OTP, click **Resend OTP**. The application sends a new OTP.
   - If the **Time-based One Time Password authentication** (TOTP) is enabled for you, the application redirects you to an **Authenticator Setup** page.

     Scan the QR Code using the Google or Microsoft **Authenticator** app on your mobile phone at the time of your first login.

     Configure the Authenticator app on your mobile phone.

     Click **Continue** to get a time-based OTP in the Authenticator app.

     Enter that OTP in the **OTP** field of the Authentication page, and click **Continue**.

Configuring the Authenticator app on your mobile phone

If you have previously created an account for same user, please remove that entry and attempt to complete the setup again.

To install the Microsoft Authenticator app on your phone:

1. While installing the app, if prompted, allow notifications about the app.
2. Upon installation, open the app and click the plus (+) icon at top and select **Work or School account** or **Other account**.
3. Add your work account by using any of the following methods:
    - Use the installed authenticator app to scan the QR Code provided on the authentication page of Arctera Unified Platform application.
    - Sign in with your application credentials and follow the screen instructions.

Upon successful scanning or signing in, your account gets connected to Microsoft Authenticator.

To install the Google Authenticator app on your phone:

1. While installing the app, if prompted, allow notifications about the app.
2. Upon installation, log in with your Google account credentials. Scroll down and click the plus (+) icon.
3. Scan the QR Code with the Google Authenticator app. Your account gets connected to the Google Authenticator app.

Resetting the Authenticator device

If you accidentally remove the account from authenticator app or misplace the device on which the app is installed, you can contact your administrator to request for resetting the Authenticator device for you.

About the New Features updates

Upon successful sign-in, the New Features window appears, presenting the latest release updates for Arctera Management Console, Arctera eDiscovery, Arctera Personal Archive, Arctera Capture, and Arctera Surveillance.

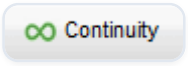
- To temporarily hide this window, click **Close**.
- To access this window later, click the profile icon and choose **Show New Features**.

- To permanently hide this window, click **Do Not Show Again**. Subsequently, upon next login, this window will no longer appear. To enable its visibility, contact your system administrator. However, it will reappear automatically with the next release updates.
- To access the updates in the latest release, refer to the Release Notes.

About email continuity

Email Continuity is an add-on feature of Arctera Unified Platform that lets you access new archived messages in Arctera Personal Archive if your mail server becomes unavailable. Since your administrator configures and manages Email Continuity, you do not need to enable the feature in Arctera Personal Archive. In the event that your mail server becomes unavailable, Email Continuity starts up automatically so you can continue to work with your archived messages.

The **Email Continuity** icon in the toolbar at the top of the browser window shows the current status for Email Continuity. A green Email Continuity icon indicates the feature is active.



About legacy data

Your organization can import legacy data that includes the messages you sent and received before your Arctera Unified Platform account was created. Arctera Unified Platform supports the import of legacy data that includes the following email message formats:

- .PST
- .EML
- .MSG
- .NSF

If your legacy data includes .PST files, Arctera Personal Archive can display the folder structure from those files. You can view the folder structure from imported .PST files in the Folders tab in the left pane of Arctera Personal Archive.

Configuring user preferences

You can change your password and customize your session, appearance, language, and regional preferences from the user profile menu. The preferences that you configure apply to your user account.

To configure user preferences:

1. In the upper-right corner of the application screen, click the **User Profile** icon.
2. To change your password, click **Change Password**.

   In **Current password**, enter your current password. In **New password**, enter your new password. In **Confirm password**, re-enter the new password, and then click **Change Password**.

   The password must contain at least eight characters. It cannot include the words **admin**, **evctestcompany**, or **onmicrosoft** because these words are part of your user name.
3. To configure your preferences, click **User Preferences**, and use the following options:

OPTION	DESCRIPTION
General	Lets you enable or disable automatic session saving.- Turn the **Auto Save** toggle on or off.- If **Auto Save** is turned on, select the required interval from the **Interval** list, and then click **Save**.Enabling Auto Save can increase the time required to load the application when you sign in. The loading time depends on the time required to open your saved session.- To restore the default Auto Save settings, click **Default**.
Appearance	Lets you customize how application content is displayed.- **Theme:** Select one of the following display themes: - **Dark** - **Light** - **System:** Uses the theme configured for your operating system.- **Icon display mode:** Select how navigation options are displayed: - **Icons and labels** - **Icons only**- **Data density:** Select the amount of spacing between displayed items: - **Default** - **Comfortable** - **Compact**- **Preview pane:** Select where the preview pane is displayed: - **Below** - **Right** - **None**- **Text size:** Select the preferred text size: - **Small** - **Default** - **Large**- Click **Save** to apply your selections.- Click **Default** to restore the default appearance settings.

OPTION	DESCRIPTION
Language and region	Lets you configure the language and regional display formats used in the application.- **Default Language:** Select the language in which application content is displayed.- **Number Format:** Select the format used to display numbers.- **Date Format:** Select the format used to display dates.- **Time zone:** Select the time zone used to display date and time information.- Click **Save** to apply your selections.- Click **Default** to restore the default language and region settings.

Resetting a forgotten password

If you forget your password and need help resetting it, Arctera Personal Archive can help you by sending a Reset Password link to your authenticated user name (email address).

To reset your forgotten password:

1. On the authentication screen, click the **Forgot your password** link.
2. In the **User Name** field, provide your user name (email address).
3. In the **Validation Code** field, enter the correct captcha from the image, without spaces. Letters are not case-sensitive.

   You cannot sign in if your archive fails to authorize your location or computer. You can contact system administrator for assistance.
4. Click **Send**.

   The application sends you an email with a reset password link. Check your email inbox, including the spam or junk folder, for this message. This link expires after 30 minutes from you receive the email.
5. Open the password reset email and click on the provided **Reset Password** link.

   The application directs you to a **Reset Password** page.
6. Type your user name, a new password, retype to confirm it, and click **Submit**.

   After successful reset, you receive an email notification that your password has been changed successfully.

About Personal Archive user interface

The Personal Archive user interface provides a consistent way to access features, browse available locations, search for content, and work with displayed results. The options and actions available in the interface can vary depending on the selected node, your permissions, and the selected content.

The application navigation pane appears on the left side of the screen. It provides access to the following nodes:

- **Global search**. See Managing global searches
- **Archives**. See Managing Archives
- **Collaboration**. See Managing collaboration messages
- **InsightBooks**. See Managing InsightBooks
- **Exports**. See Managing exports

Select a node to open its corresponding workspace.

Managing global searches

This section includes the following topics:

- Global search FAQs
- Understanding search fundamentals
  - Hit highlighting
  - Boolean operators
  - Wildcard characters
  - Proximity searches
  - Stop words
  - Special characters and double-byte character searches
  - Searchable attachment types
  - Search syntax
- Performing an advanced search
- Performing a query search
- Updating or deleting Saved Searches
- Working with the search result
  - Composing a new email
  - Replying to and forwarding emails
  - Restoring emails
  - Applying or removing tags
  - Saving emails
  - Printing emails
  - Deleting emails
  - Creating an InsightBook from a search
  - Moving emails to an InsightBook

Global search FAQs

The following frequently asked questions provide information about searching archived content in Arctera Personal Archive.

Q: Which messages can I search in Arctera Personal Archive?

Ans: You can search any message available in your Personal Archive, including messages that you deleted from Microsoft Outlook after they were archived.

If you are a reviewer, you can search email messages in the archives of the accounts that you manage.

If you have delegate access to an archive, you can also search email messages available in that archive.

Q: Can I search contacts, tasks, or calendar items?

Ans: No. Arctera Unified Platform does not archive contacts, tasks, or calendar items. Therefore, these items are not searchable in Arctera Personal Archive.

Q: Does capitalizing a search term affect the search results?

Ans: No. Search terms are not case-sensitive. Capitalizing a search term does not affect the search results.

Q: Does Arctera Personal Archive ignore commonly used words or special characters?

Ans: Yes. Arctera Personal Archive ignores specified stop words and special characters when processing searches.

For more information, see **About stop words** and **About special characters and double-byte character searches**.

Q: How can I search for an attachment?

Ans: To search for a specific attachment, enter the attachment file name in Query Search. You can also use Advanced Search to find messages that contain a specific attachment type.

For information about the supported file formats, see **About searchable attachment types**.

Q: How can I search for two terms at the same time?

Ans: Use the `AND` operator between two search terms to return items that contain both terms.

For example:

```
cloud AND computing
```

You can also use the `OR` operator between two search terms to return items that contain either term or both terms.

For example:

```
cloud OR computing
```

For more information, see **About Boolean operator search syntax**.

Q: How can I exclude a term from the search results?

Ans: Use the `NOT` operator between two search terms to include the first term and exclude the second term.

For example:

```
cloud NOT computing
```

This search returns items that contain *cloud* but do not contain *computing*.

For more information, see **About Boolean operator search syntax**.

Q: Can I perform a wildcard search?

Ans: Yes. Use a question mark (`?`) or an asterisk (`*`) at the end of a search term:

- Use `?` to represent one unspecified character.
- Use `*` to represent one or more unspecified characters.

The search term must contain at least three characters before the wildcard character.

For example:

- `appl?` can find terms such as *apple* or *apply*.
- `comp*` can find terms such as *computing*, *computer*, or *company*.

For more information, see **About wildcard search syntax**.

Q: How can I perform a proximity search?

Ans: Enclose two search terms in double quotation marks, followed by a tilde (`~`) and a numeric value.

For example:

```
"cloud computing"~5
```

The numeric value specifies the maximum number of words that can occur between the two search terms.

For more information, see **About proximity search syntax**.

Q: How can I search within a specific email domain?

Ans: Enter the domain name in the **To** field of Advanced Search to find messages associated with that domain.

You can also use a wildcard to search across multiple domains that share the same beginning.

For example:

```
mycloud*
```

This search returns email messages for domains whose names begin with *mycloud*.

Understanding search fundamentals

This section helps you use **Global Search** effectively and understand how search processes and returns matching content. This section provides information about the following:

- Hit highlighting
- Searchable attachment types
- Stop words
- Special characters and double-byte character searches
- Boolean operators
- Wildcard characters
- Proximity searches
- Search syntax

Hit highlighting

Hit highlighting visually identifies relevant terms in the item preview pane. It highlights terms that match the search criteria and terms associated with tags, helping you quickly scan the email content and locate relevant information. Highlighting applies to the subject line, message body, attachment name, and text or HTML preview of attachments. However, navigation between occurrences is available only within the message body.

Search terms are highlighted in orange, and terms associated with tags are highlighted in green. Hover over a highlighted term to determine whether it originated from a search query or a tag.

Capabilities

Hit highlighting provides the following capabilities:

- Supports stop words and special characters.
- Handles multi-byte characters. Currently, it supports only Japanese language.
- Highlights terms that extend across line breaks.
- Applies highlighting in Native Viewer.
- Works for tenants where stop-word indexing is enabled.
- Supports proximity-based searches.
- Provides navigation between highlighted terms.

Limitations

Hit highlighting has the following limitations:

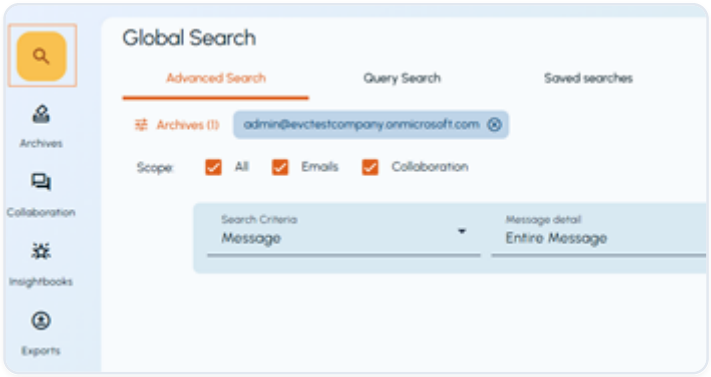
- Search terms that contain leading or trailing special characters are not highlighted.
- Stop words are included in the highlighting and occurrence count in Native Viewer.
- Hit highlighting is not supported in Query Search.
- Non-visible metadata, such as image information and indexed item metadata, cannot be highlighted.

Using hit highlighting

The preview pane provides a drop-down list that displays each matched term and its number of occurrences. You can use this list to review all highlighted terms or focus on a specific term.

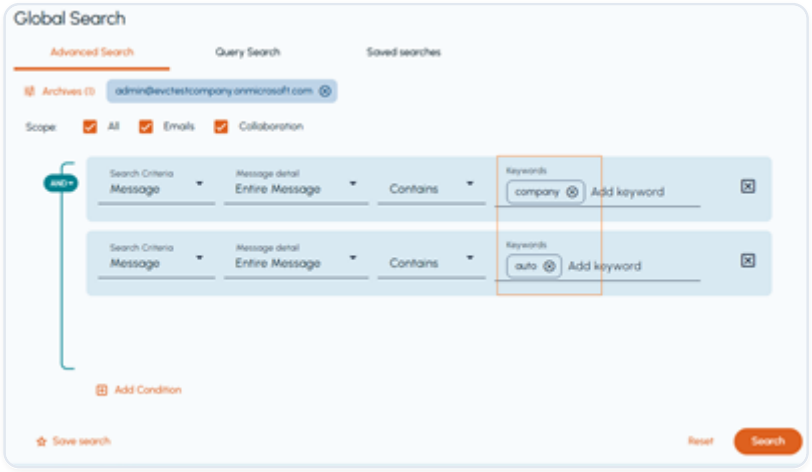
To view highlighted terms:

1. In the left navigation pane, select **Search**.



2. Perform a search by using one of the following methods:

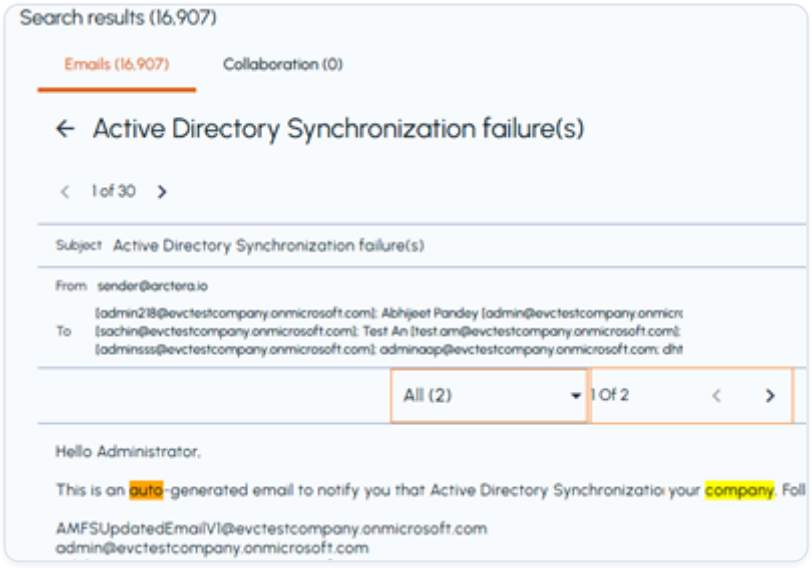
   - In **Query Search** or **Advanced Search**, enter the required keywords while configuring the search criteria. After entering the keywords, click anywhere outside the **Keywords** field to enable the **Search** button, and then click **Search**.



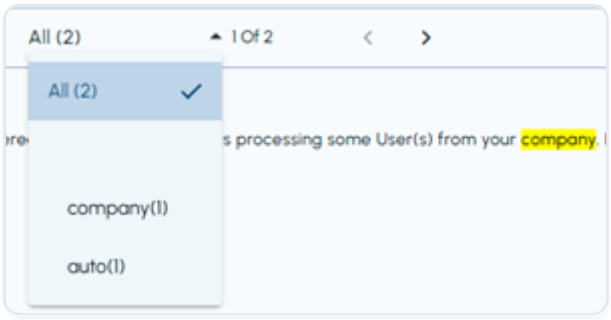
   - Open **Saved Searches**, enter a keyword in the search field, and then press **Enter**.

3. In the items grid, click the item that you want to review.

   The item opens in the preview pane, and the keywords used in the search are highlighted.



4. In the preview pane, do the following as required:



- Click **All** to open the list of highlighted terms and view the number of occurrences of each term.
- Select **All** to highlight every matched term, or select a specific term to highlight only its occurrences. The occurrence indicator displays the current occurrence and the total number of occurrences for the selected term.
- Click the *previous or next arrow* to navigate between occurrences in the message body.

Searchable attachment types

Arctera Personal Archive lets you search message attachments to locate archived messages that contain a specific attachment or a supported attachment type.

Use **Query Search** to search for a specific attachment by entering its file name. Use **Advanced Search** to search attachment content or find messages that contain a particular attachment type. When searching by attachment type, select **Has Attachment**, and then specify the required type in the **Attachment Type** field.

> **Note:** Password-protected and encrypted attachments are not included in searches.

The following table lists the attachment types that Arctera Unified Platform can search.

FILE EXTENSION	SEARCHABLE ATTACHMENT TYPES
`.accdb`	Microsoft Access (text only) 1.0, 2.0, 95–2010
`.ai`	Adobe Illustrator
`.asf`	Windows Media ASF (metadata only)
`.avi`	AVI (metadata only)
`.csv`	Microsoft Excel for Windows
`.dbf`	Dbase III, IV, V; Enable Spreadsheet
`.doc`	Microsoft Word for Windows 1.0–2013; Microsoft Word 2003 XML (text only); Microsoft Word 98 (J)
`.docm`	Microsoft WordPad
`.docx`	Microsoft Word for Windows; Microsoft WordPad
`.dwg`	AutoCAD Drawing 9.0–14.0
`.emf`	Enhanced Metafile (EMF); Visio (Page Preview mode WMF/EMF)
`.eml`	Microsoft Outlook Express (EML)
`.htm`	HTML (CSS rendering not supported) 1.0–4.0
`.html`	HTML (CSS rendering not supported)
`.hwp`	Hangul 97–2010
`.ics`	vCalendar 2.1
`.keynote`	Apple iWork Keynote (MacOS, text, and PDF preview) 9
`.mht`	Encoded mail messages

FILE EXTENSION	SEARCHABLE ATTACHMENT TYPES
`.mp3`	MP3 (ID3 metadata only)
`.mp4`	MPEG-4 (metadata only)
`.mpp`	Microsoft Project (table view only) 98–2003, 2007, 2010
`.msg`	Microsoft Outlook (MSG) 97–2013
`.numbers`	Apple iWork Numbers (MacOS, text, and PDF preview) 9
`.odg`	OpenOffice Draw
`.odp`	IBM Lotus Symphony Presentations 1.x
`.ods`	Oracle Open Office Calc 3.x; StarOffice Calc
`.odt`	OpenOffice Writer 1.1–3.0; Oracle Open Office Writer 3.x; StarOffice Writer
`.oft`	Microsoft Outlook Forms Template (OFT) 97–2013
`.one`	Microsoft OneNote (text only) 2007, 2010
`.ots`	Oracle Open Office Calc; StarOffice Calc
`.ott`	OpenOffice Writer; Oracle Open Office Writer
`.pages`	Apple iWork Pages (MacOS, text, and PDF preview) 9
`.pdf`	Adobe PDF 1.0–1.7 (Acrobat 1–10); Adobe PDF Package 1.7 (Acrobat 8–10); Adobe PDF Portfolio 1.7 (Acrobat 8–10); Graphic embeddings in PDF
`.pot`	Microsoft PowerPoint for Windows Template 2007–2013
`.potx`	Microsoft PowerPoint for Windows Template

FILE EXTENSION	SEARCHABLE ATTACHMENT TYPES
`.pps`	Microsoft PowerPoint for Windows slide show 2007–2013
`.ppsx`	Microsoft PowerPoint for Windows slide show
`.ppt`	Microsoft PowerPoint for Windows 3.0–2013
`.pptx`	Microsoft PowerPoint for Windows
`.rtf`	IBM DCA/RFT; Microsoft WordPad; Rich Text Format (RTF)
`.stc`	Oracle Open Office Calc
`.stw`	Oracle Open Office Writer
`.swf`	Flash (text extraction only) 6.x, 7.x, Lite
`.sxw`	Oracle Open Office Writer; StarOffice Writer 5.2–9.0
`.txt`	ANSI Text 7- and 8-bit; Unicode Text 3.0, 4.0
`.vcf`	vCard 2.1
`.vcs`	vCalendar
`.vsd`	Visio 5.0–2007
`.wav`	WAV (metadata only)
`.wk1`	Lotus 1-2-3
`.wk3`	Lotus 1-2-3
`.wma`	Windows Media Audio (metadata only)
`.wmf`	Visio (Page Preview mode WMF/EMF) 4; Windows Metafile
`.wml`	Wireless Markup Language

FILE EXTENSION	SEARCHABLE ATTACHMENT TYPES
`.wmv`	Windows Media Video WMV (metadata only)
`.xhtml`	XHTML (file ID only)
`.xls`	Microsoft Excel for Windows 3.0–2013
`.xlsb`	Microsoft Excel for Windows 2007–2013 (Binary)
`.xlsm`	Microsoft Excel for Windows
`.xlsx`	Microsoft Excel for Windows
`.xlt`	Microsoft Excel for Windows
`.xltm`	Microsoft Excel for Windows
`.xml`	Extensible Markup Language files; Microsoft Excel for Windows 2003 XML (text only); XML (text only)
`.xmp`	Adobe Illustrator XMP CS1–6
`.xps`	Microsoft XPS (text only)
`.zip`	Compressed file

Searching supported attachment types helps you narrow the results to messages that contain the required attachment content or file format.

Stop words

Stop words are commonly used words that Arctera Personal Archive ignores when processing a search. Because these words are excluded from search matching, including them in a query does not help narrow the search results.

Understanding stop-word processing helps you determine why some words in a query do not affect the returned results.

Arctera Personal Archive treats the following English words as 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

Stop-word support is available for English searches. Support for Japanese stop words is available only if your organization subscribes to enhanced Japanese search.

Stop words in Boolean searches

The words `AND`, `OR`, and `NOT` function as operators when they are used in a Boolean operator search. In this context, Arctera Personal Archive processes them as Boolean operators instead of ignoring them as stop words.

For example:

```
cloud AND computing
```

In this search, `AND` instructs the application to return items that contain both *cloud* and *computing*.

Stop words in proximity searches

Proximity search results can contain stop words. However, Arctera Personal Archive excludes stop words when calculating the number of words between the specified search terms.

For example:

```
"cloud computing"~5
```

The application calculates the proximity between *cloud* and *computing* without including any stop words that occur between them in the proximity word count.

Stop words in hit highlighting

Hit highlighting supports stop words for tenants where stop-word indexing is enabled.

In Native Viewer, stop words are included in the highlighted terms and their occurrence counts.

Understanding how stop words are processed helps you create effective search queries and interpret search and hit-highlighting results correctly.

Special characters

Arctera Personal Archive omits the following special characters from searches:

```
* @ % ^ - + = _ { } [ ] , < > ; : / / ?
```

Special cases

- The words AND, OR, and NOT act as operators in a Boolean operator search. See Boolean operators.
- Question marks and asterisks act as wildcard characters in a wildcard search. See Wildcard characters.

Special characters and double-byte character searches

Arctera Personal Archive processes special characters and double-byte characters differently when performing searches. Understanding these rules helps you create valid queries and determine how characters in a query affect the search results.

Special characters:

Arctera Personal Archive omits the following special characters when processing search queries:

```
* @ % ^ - + = _ { } [ ] , < > ; : / \ ?
```

When a special character is omitted, the remaining terms must still form a valid search expression.

Special cases for wildcard characters:

Question marks (`?`) and asterisks (`*`) function as wildcard characters when used at the end of a search term in a wildcard search.

For example:

- `appl?` uses the question mark to represent one unspecified character.

- `comp*` uses the asterisk to represent one or more unspecified characters.

In phrase searches, question marks and asterisks are treated as special characters rather than wildcard characters.

Special characters in Boolean searches:

A special character used as a search term in a Boolean expression can result in an invalid search. Arctera Personal Archive removes the special character while processing the query, which can leave an incomplete Boolean expression.

For example:

`cloud OR +`

The application removes the plus sign (`+`). As a result, the `OR` operator does not have a second search term, and the search is invalid.

Consider the following example:

`cloud AND – AND computing`

The application removes the special character (`–`). As a result, two `AND` operators remain next to each other, and the search is invalid.

Special characters in hit highlighting:

Hit highlighting supports special characters. However, search terms with leading or trailing special characters are not highlighted.

Double-byte character searches:

Arctera Personal Archive provides the ability to search languages that contain double-byte characters, such as Japanese and Chinese.

Use phrase search syntax to search for an exact phrase that contains double-byte characters. Enclose the complete phrase in double quotation marks.

For example:

`"敏捷的棕色狐狸" AND 3515431`

This query searches for the specified double-byte character phrase together with the term `3515431`.

Enhanced Japanese searches:

Enhanced Japanese search is available as an optional feature. It uses a Japanese-language analyzer to provide improved search results across different Japanese scripts.

To determine whether enhanced Japanese search is available for your organization, contact your Arctera Unified Platform administrator. Administrators can contact Arctera Services & Support for information about configuring this feature.

When enhanced Japanese search is enabled, the following capabilities and conditions apply:

- Searches support any combination of hiragana, kanji, katakana, and romaji scripts.
- Searches apply to text in the message subject and message body.
- Searches apply to attachment extensions and attachment content.
- Query Search requires a minimum of two English or Japanese characters.
- For any search, the wildcard character limit is one English or Japanese character.

Double-byte characters in hit highlighting:

Hit highlighting handles multi-byte characters, allowing matched terms containing Japanese or Chinese characters to be highlighted in supported item content.

Understanding how special characters and double-byte characters are processed helps you avoid invalid queries and create searches that return the intended results.

Boolean operators

Boolean operators let you combine or exclude search terms to refine the results returned by Quick Search and Advanced Search. Arctera Personal Archive supports the `AND`, `OR`, and `NOT` operators.

> **Note:** Boolean operators are supported in English only unless your organization subscribes to enhanced Japanese search.

> **AND operator:**

Use the `AND` operator between two search terms to return items that contain both terms.

For example:

```
cloud AND computing
```

This search returns items that contain both *cloud* and *computing*.

Arctera Personal Archive treats a space between two search terms as the `AND` operator. The following searches produce the same results:

```
cloud computing
```

```
cloud AND computing
```

OR operator:

Use the `OR` operator between two search terms to return items that contain either term or both terms.

For example:

```
cloud OR computing
```

This search returns items that contain *cloud*, *computing*, or both.

NOT operator:

Use the `NOT` operator between two search terms to return items that contain the first term but not the second term.

For example:

```
cloud NOT computing
```

This search returns items that contain *cloud* but do not contain *computing*.

You can also begin a search with the `NOT` operator.

For example:

```
NOT "cloud computing"
```

This search attempts to return every item that does not contain the phrase *cloud computing*.

> **Note:** A search that begins with the `NOT` operator might not complete because it can return a large number of matching items, particularly when searching a large archive.

> **Using multiple Boolean operators:**

You can combine multiple Boolean operators to create more complex searches.

For example:

```
cloud AND computing OR public
```

In this expression, `cloud AND computing` is processed as one term. The search returns the following items:

- Items that contain both *cloud* and *computing*
- Items that contain *cloud*, *computing*, and *public*
- Items that contain *public*

You can also use parentheses to group terms for Boolean processing.

For example:

```
(cloud (computing OR public)) NOT software
```

The space between `cloud` and `(computing OR public)` is treated as the `AND` operator. The search returns the following items:

- Items that contain both *cloud* and *computing* but do not contain *software*
- Items that contain both *cloud* and *public* but do not contain *software*

A search can contain a maximum of 249 Boolean operators.

Using Boolean operators with phrase searches:

Boolean operators can be used with phrases enclosed in double quotation marks.

For example:

```
"cloud computing" OR "public cloud" NOT software
```

This search returns the following items:

- Items that contain the phrase *cloud computing* but do not contain *software*
- Items that contain the phrase *public cloud* but do not contain *software*
- Items that contain both phrases but do not contain *software*

Boolean operators and special characters:

Do not use a special character as a search term in a Boolean expression. Arctera Personal Archive removes special characters while processing a search, which can leave an incomplete or invalid Boolean expression.

For example:

`cloud OR +`

The application removes the plus sign (`+`). As a result, the `OR` operator has no second search term, and the search is invalid.

Consider the following example:

`cloud AND – AND computing`

The application removes the special character (`–`). As a result, two `AND` operators remain adjacent to each other, and the search is invalid.

Understanding Boolean operators helps you construct precise searches that return items containing the required terms.

Wildcard characters

A wildcard search uses a wildcard character at the end of a search term to represent one or more unspecified characters. Arctera Personal Archive supports the following wildcard characters:

- A question mark (`?`) represents a single unspecified character.
- An asterisk (`*`) represents one or more unspecified characters.

Using a single-character wildcard:

Place a question mark (`?`) at the end of a search term to represent one unspecified character.

For example:

`appl?`

This search returns archived messages containing terms such as *apple* or *apply*.

Using a multiple-character wildcard:

Place an asterisk (`*`) at the end of a search term to represent one or more unspecified characters.

For example:

`comp*`

This search returns archived messages containing terms such as *computing*, *computer*, or *company*.

Conditions for using wildcard characters:

The following conditions apply when using wildcard characters:

- Place the wildcard character at the end of the search term.
- Enter at least three characters before the wildcard character.
- In phrase searches, `?` and `*` are treated as special characters, not wildcard characters.

Understanding wildcard characters helps you search for variations of a term when the exact ending is unknown.

Proximity searches

A proximity search finds two words that occur within a specified distance of each other. To perform a proximity search, enclose the two words in double quotation marks, follow them with a tilde (`~`), and then enter a numeric value.

For example:

`"cloud computing"~5`

The numeric value specifies the maximum number of words that can occur between the two words in the search.

Conditions for using proximity searches:

Note the following when using proximity searches:

- The returned results are not highlighted.
- The proximity word count cannot exceed 49 words.
- Wildcard characters cannot be used in a proximity search.
- Proximity search results can contain stop words, but stop words are excluded from the proximity word count.

Understanding proximity searches helps you find related terms that occur near each other even when other words appear between them.

Search syntax

Search syntax defines how search terms, operators, and special characters must be entered to produce the required search results. Arctera Personal Archive supports phrase, Boolean operator, wildcard, and proximity search syntax in Advanced Search and Query Search.

> **Note:** Search terms are not case-sensitive. Capitalizing a search term does not affect the search results.

> **Phrase search syntax:**

Phrase search syntax lets you find an exact sequence of one or more words in archived content. Use a phrase search when the order and grouping of the words are important, such as when searching for a product name, project name, or commonly used expression.

To perform a phrase search, enclose the complete phrase in double quotation marks. Phrase searches are supported in Query Search and Advanced Search.

For example:

```
"cloud computing"
```

This search returns archived messages that contain the exact phrase *cloud computing*. It does not return messages in which *cloud* and *computing* occur separately or in a different order.

Phrase search syntax helps narrow the search results to items that contain the specified words together in the required sequence.

Boolean operator search syntax:

Boolean operator search syntax lets you combine search terms or exclude specific terms from the search results. Use a Boolean operator search when you want to find items that contain multiple terms, either of two terms, or one term without another term.

Boolean operator searches are supported in Query Search and Advanced Search. The supported Boolean operators are `AND`, `OR`, and `NOT`.

> **Note:** Boolean operators are supported in English only unless your organization subscribes to enhanced Japanese search.

> **Using the AND operator:**

Use the `AND` operator between two search terms to find items that contain both terms.

For example:

`cloud AND computing`

This search returns archived messages that contain both *cloud* and *computing*.

Arctera Personal Archive treats a space between two search terms as the `AND` operator. Therefore, the following searches produce the same results:

`cloud computing`

`cloud AND computing`

Using the OR operator:

Use the `OR` operator between two search terms to find items that contain either term or both terms.

For example:

`cloud OR computing`

This search returns archived messages that contain *cloud*, *computing*, or both terms.

Using the NOT operator:

Use the `NOT` operator between two search terms to include the first term and exclude the second term.

For example:

`cloud NOT computing`

This search returns archived messages that contain *cloud* but do not contain *computing*.

You can also begin a search with the `NOT` operator.

For example:

`NOT "cloud computing"`

This search attempts to return every item that does not contain the phrase *cloud computing*.

> **Note:** A search that begins with the `NOT` operator might not complete because it can return a large number of matching items, particularly when searching a large archive.

> **Using multiple Boolean operators:**

You can use multiple Boolean operators to create more complex searches.

For example:

```
cloud AND computing OR public
```

In this expression, `cloud AND computing` is processed as one term. The search returns the following items:

- Items that contain both *cloud* and *computing*
- Items that contain *cloud*, *computing*, and *public*
- Items that contain *public*

A search can contain a maximum of 249 Boolean operators.

Grouping search terms:

Use parentheses to group terms for Boolean processing.

For example:

```
(cloud (computing OR public)) NOT software
```

The space between `cloud` and `(computing OR public)` is treated as the `AND` operator. The search returns the following items:

- Items that contain both *cloud* and *computing* but do not contain *software*
- Items that contain both *cloud* and *public* but do not contain *software*

Combining Boolean operators with phrase searches:

You can use Boolean operators with phrases enclosed in double quotation marks.

For example:

```
"cloud computing" OR "public cloud" NOT software
```

This search returns the following items:

- Items that contain the phrase *cloud computing* but do not contain *software*
- Items that contain the phrase *public cloud* but do not contain *software*
- Items that contain both phrases but do not contain *software*

Using the Boolean operators and special characters:

Do not use a special character as a search term in a Boolean expression. Arctera Personal Archive removes special characters while processing a search, which can leave an incomplete or invalid Boolean expression.

For example:

`cloud OR +`

The application removes the plus sign (`+`). As a result, the `OR` operator does not have a second search term, and the search is invalid.

Consider the following example:

`cloud AND – AND computing`

The application removes the special character (`–`). As a result, two `AND` operators remain next to each other, and the search is invalid.

Boolean operator search syntax helps you refine search results by specifying which terms must be included, which terms can be included, and which terms must be excluded.

Wildcard search syntax:

Wildcard search syntax lets you search for variations of a term by replacing one or more characters at the end of the term with a wildcard character. Use a wildcard search when you know the beginning of a term but its ending can vary.

Wildcard searches are supported in Query Search and Advanced Search. Arctera Personal Archive supports the following wildcard characters:

- A question mark (`?`) represents one unspecified character.
- An asterisk (`*`) represents one or more unspecified characters.

Using a single-character wildcard:

Place a question mark (`?`) at the end of a search term to represent one unspecified character.

For example:

`appl?`

This search can return archived messages containing terms such as *apple* or *apply*.

Using a multiple-character wildcard:

Place an asterisk (`*`) at the end of a search term to represent one or more unspecified characters.

For example:

`comp*`

This search can return archived messages containing terms such as *computing*, *computer*, or *company*.

The following conditions apply when using wildcard search syntax:

- Place the wildcard character at the end of the search term.
- Enter at least three characters before the wildcard character.
- In phrase searches, question marks (`?`) and asterisks (`*`) are treated as special characters rather than wildcard characters.

Wildcard search syntax helps you find related terms that share the same beginning but have different endings.

Proximity search syntax:

Proximity search syntax lets you find two words that occur within a specified distance of each other. Use a proximity search when the words do not need to appear next to each other but must occur within a defined number of words.

Proximity searches are supported in Query Search and Advanced Search. Search terms are not case-sensitive; therefore, capitalization does not affect the search results.

To perform a proximity search, enclose the two words in double quotation marks. After the closing quotation mark, enter a tilde (`~`) followed by a numeric value. The numeric value specifies the maximum number of words that can occur between the words enclosed in quotation marks.

For example:

`"cloud computing"~5`

This search returns archived messages in which *cloud* and *computing* occur within five words of each other.

The following conditions apply when using proximity search syntax:

- The proximity word count cannot exceed 49 words.
- Wildcard characters cannot be used in a proximity search.
- Proximity search results can contain stop words, but stop words are excluded from the proximity word count.
- Terms returned by a proximity search are not highlighted.

Proximity search syntax helps you find related words that occur near each other even when other words appear between them.

Performing an advanced search

Advanced Search lets you configure one or more search conditions to search emails and collaboration messages within the selected archives.

To perform an advanced search:

1. On the **Global Search** page, select the **Advanced Search** tab.
2. Click **Archives**.

   The **Select Archives** dialog box appears.
3. Select the **All**, **Personal**, **Review**, or **Delegate** tab to display the corresponding archives.
4. Search for and select the archives in which you want to perform the search.

   - Use the pagination controls to move between pages and view the archives listed on each page.
   - To display only the selected archives, click **Show selected**. The option changes to **Show all**, which you can click to display both selected and unselected archives.
5. Click **Apply**.

   The selected archives appear in the **Archives** section.
6. Under **Scope**, select one of the following options:

   - **All:** Searches emails and collaboration messages in the selected archives.
   - **Emails:** Searches only emails in the selected archives.

- **Collaboration:** Searches only collaboration messages in the selected archives.

7. Configure the search criterion.

   One search condition is displayed by default.

   - To define an additional search condition, click **Add Condition**.
   - To remove a condition, click the **Remove** icon in the corresponding row.
   - When multiple conditions are configured, select **AND** to return items that match all conditions or **OR** to return items that match at least one condition.
   - To clear the configured search criteria and start again, click **Reset**.

8. Click **Search**.

   The **Advanced Search** section collapses, and the matching items appear in the **Search results** section. For more information, see Working with the search result

   - To revisit the **Advanced Search** section and review the configured search criteria, click the **Expand** icon in the upper-right corner of the page. The icon changes to **Collapse**.
   - To minimize the **Advanced Search** section, click the **Collapse** icon.
   - To adjust the height of the **Advanced Search** or **Search results** section, drag the resize handle between the sections up or down.

Performing a query search

Query Search lets you search selected archives by entering a query. You can search emails, collaboration messages, or both content types.

To use Query Search:

1. On the **Global Search** page, select the **Query Search** tab.
2. Click **Archives**.

   The **Select Archives** dialog box appears.

3. Select the **All**, **Personal**, **Review**, or **Delegate** tab to display the corresponding archives.
4. Search for and select the archives in which you want to perform the search.

   - Use the pagination controls to move between pages and view the archives listed on each page.

- To display only the selected archives, click **Show selected**. The option changes to **Show all**, which you can click to display both selected and unselected archives.

5. Click **Apply**.

   The selected archives appear in the **Archives** section.

6. Under **Scope**, select one of the following options:

   - **All:** Searches emails and collaboration messages in the selected archives.
   - **Emails:** Searches only emails in the selected archives.
   - **Collaboration:** Searches only collaboration messages in the selected archives.

7. Enter the query.
8. Click **Search**.

   The **Query Search** section collapses, and the matching items appear in the **Search results** section. For more information, see Working with the search result

   - To revisit the **Query Search** section and review the configured query, click the **Expand** icon in the upper-right corner of the page. The icon changes to **Collapse**.
   - To minimize the **Query Search** section, click the **Collapse** icon.
   - To adjust the height of the **Query Search** or **Search results** section, drag the resize handle between the sections up or down.

Updating or deleting Saved Searches

While performing an Advanced Search or a Query Search, you can define the search criteria and save the search. Saved Searches let you find the new archived messages that meet your search criteria as they are archived using Arctera Unified Platform. You can restore and delete these saved searches when needed.

To update a saved search:

1. In the left navigation pane, click **Searches** (search icon).
2. Access the **Saved Searches** tab. A list of saved searches appears.
3. Search for and select the saved search that you want to update.
4. Click the **More options** icon (kebab icon) in the corresponding row, and then select **Save/ Update Search**. Modify the search as needed.

To delete a saved search:

1. In the left navigation pane, click **Searches** (search icon).
2. Access the **Saved Searches** tab. A list of saved searches appears.
3. Search for and select the saved search that you want to delete.
4. click the **More options** icon (kebab icon) in the corresponding row, and then select **Delete this search**. Modify the search as needed.

   The confirmation dialog box appears.
5. Click **Yes** to delete the saved search, or click **No** to abort deleting it.

   A notification is displayed to confirm that the saved search is deleted successfully.

Working with the search result

After performing (executing) a search, you can perform various actions from the search results pane. These includes:

- Composing a new email
- Replying to and forwarding emails
- Restoring emails
- Applying or removing tags
- Saving emails
- Printing emails
- Deleting emails
- Creating an InsightBook from a search
- Moving emails to an InsightBook

Composing a new email

After you perform an advanced search or query search, or access a saved search, you can compose a new email from the **Search results** pane. This allows you to:

- Communicate with relevant stakeholders while reviewing search results without navigating to another page or mail application.
- Share information identified in the search results with colleagues or other recipients.
- Follow up on findings that require clarification, confirmation, or further action.

To compose a new email:

1. In the **Search results** pane, click **New** to open the **New Mail** pane.
2. Specify the recipients and subject, add attachments if required, enter your message, and then click **Send**.

Replying to and forwarding emails

You can reply to the sender, reply to all recipients, or forward an email only when the corresponding action is enabled by your administrator. If an action is disabled, the associated Reply, Reply All, or Forward option remains inaccessible.

To reply to or forward an email:

1. On the **Search result** pane, search for and select the email that you want to reply to or forward.
2. Do any of the following:
    - Double-click the email to open it, and then select **Reply**, **Reply All**, or **Forward** from the toolbar.
    - Hover over the email, click the **More options** icon (kebab icon), and then select **Reply**, **Reply All**, or **Forward**.
3. Verify or specify the recipients in the To, Cc, and Bcc fields, as applicable.
4. Compose your message.
5. To add an attachment, click **Attachment**, and then select the required file. You can attach files up to **4 MB**.
6. Click the **Send** icon.

Restoring emails

Important!

Before restoring emails from Arctera Personal Archive to your Outlook mailbox, it is important to understand how timestamps are displayed in classic Outlook for Windows and new Outlook for Windows.

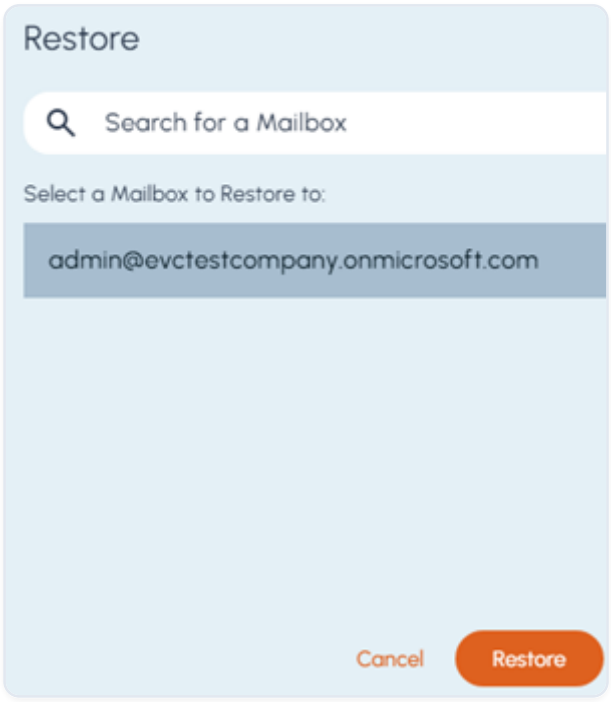
When an email is restored from Personal Archive to your inbox, the date displayed for the restored email differs between classic Outlook for Windows and new Outlook for Windows. When an email is restored to classic Outlook for Windows, the email retains its original sent date, and the

restoration date is not displayed. In new Outlook for Windows, the date and time of restoration are displayed as the email timestamp. This difference is expected and results from Outlook behavior.

Restoring an individual email

To restore an individual email:

1. On the **Search result** pane, search for and select an email you want to restore.
2. Hover over an email and click the **Restore this message** icon. The **Restore** window appears.

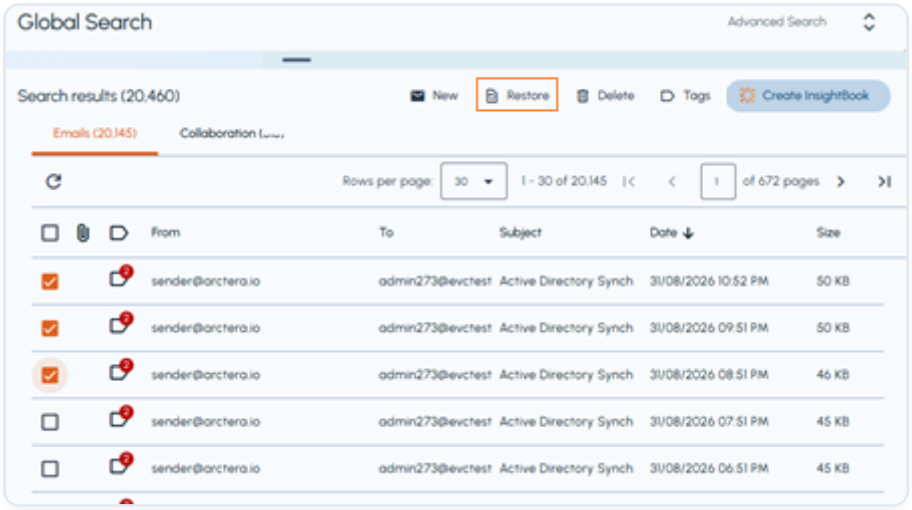


3. Search for and select the required mailbox, and click **Restore**.

Restoring multiple emails

To restore multiple emails:

1. On the **Search result** pane, search for and select one or more emails you want to restore.



2. On the toolbar, click **Restore**.
3. After restoring, verify that the expected result is reflected.

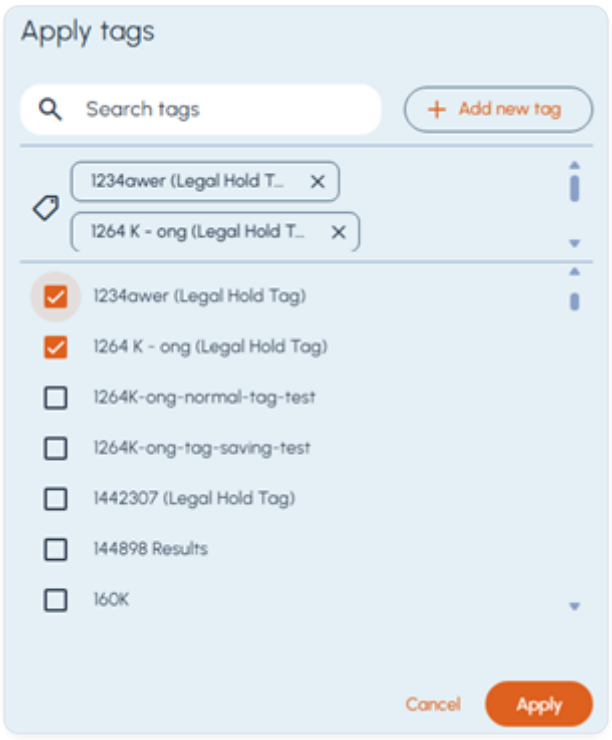
Applying or removing tags

You can apply tags to individual emails, selected emails, or all emails on the current page or across the search results. If needed, you can remove previously applied tags.

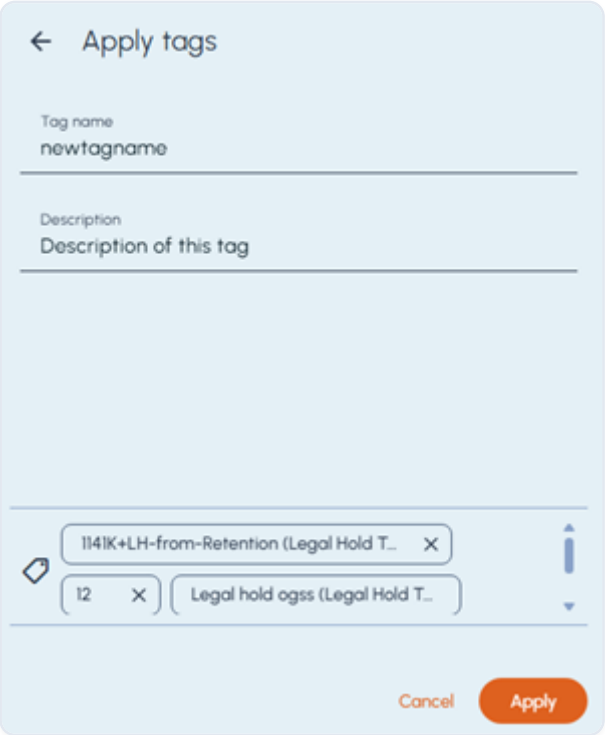
Applying tags to individual email

To apply tags to individual email:

1. On the **Search result** pane, search for and select an email to which you want apply tags.
2. Hover over an email and click the **Tag** icon. The **Apply Tags** window appears.



3. Search for and select one or more tags, then click **Apply**.
4. If you do not find a required tag, therefore, want to add a new tag, click **Add new tag**.

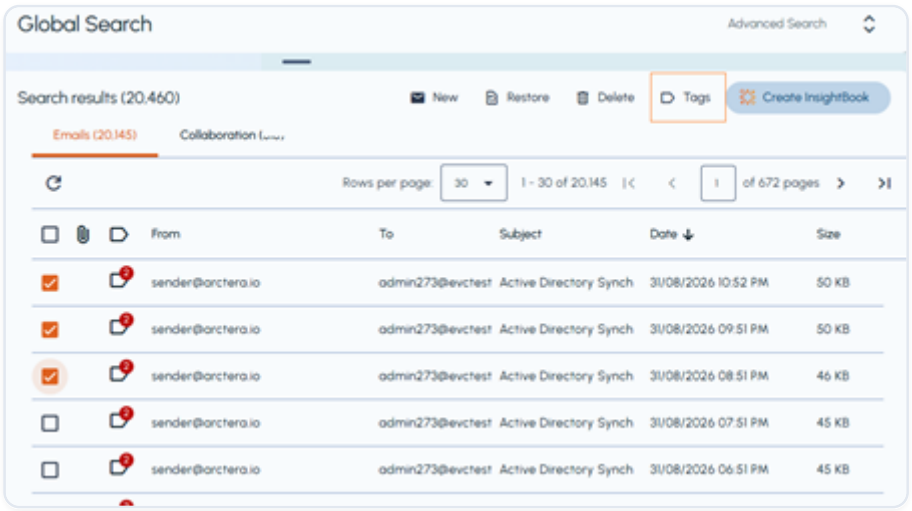


Specify a unique name in the **Tag name** field. Specify a description in the **Description** field. Then, select **Apply**.

Applying tags to multiple emails

To apply tags to multiple emails:

1. On the **Search result** pane, search for and select one or more emails to which you want apply tags.



2. On the toolbar, click **Tags** and do any of the following as needed:

OPTION	DESCRIPTION
View tagged emails	Lets you view the emails associated with a selected tag. Select a tag from the list, and then click **View** to display the tagged emails.
Tag current page	Lets you apply tags to all emails displayed on the current page. You can apply one or more existing **Saved tags** or **Retention tags**, or create a new tag and apply it to the emails on the current page.To create a new tag while applying tags to the current page, select the **New Tag** check box, and then specify the tag name (max 50 characters) and comments (max 200 characters).The **Legal Hold Tag** check box is enabled only after you select the **New Tag** check box. Select **Legal Hold Tag** if you want to create the new tag as a legal hold tag. Otherwise, leave the check box cleared. You cannot mark an existing **Saved tag** or **Retention tag** as a legal hold tag from this window.To apply the selected or newly created tag to all emails displayed on the current page, click **Tag**.
Tag selected emails	Lets you apply tags to specific emails that you select on the current page. Before using this option, select one or more emails that you want to tag. You can apply one or more existing **Saved tags** or **Retention tags**, or create a new tag and apply it to the selected emails.To create a new tag while applying tags to the selected emails, select the **New Tag** check box, and then specify the tag name and comments. The **Legal Hold Tag** check box is enabled only after you select the **New Tag** check box. Select **Legal Hold Tag** if you want to create the new tag as a legal hold tag. Otherwise, leave the check box cleared.To apply the selected or newly created tag to the selected emails, click **Tag**.You cannot mark an existing **Saved tag**

OPTION	DESCRIPTION
	or **Retention tag** as a legal hold tag from this window.
Tag all emails	Lets you apply tags to all emails in the current result set. You do not need to select individual emails before using this option. You can apply one or more existing **Saved tags** or **Retention tags**, or create a new tag and apply it to all emails.To create a new tag while applying tags to all emails, select the **New Tag** check box, and then specify the tag name and comments. The **Legal Hold Tag** check box is enabled only after you select the **New Tag** check box. Select **Legal Hold Tag** if you want to create the new tag as a legal hold tag. Otherwise, leave the check box cleared.To apply the selected or newly created tag to all emails, click **Tag**.You cannot mark an existing **Saved tag** or **Retention tag** as a legal hold tag from this window.
Delete tag	Select the tag that you want to permanently delete, and then click **Delete tag**. You can delete only one tag at a time.
Update tag	Lets you modify an existing saved tag. Select the tag that you want to update. You can update only one tag at a time. Use **Search tags** to locate a specific tag, if required.After selecting a tag, modify the tag name or description as required. To convert the selected tag to a legal hold tag, select the **Legal Hold Tag** check box.Click **Update** to save the changes.

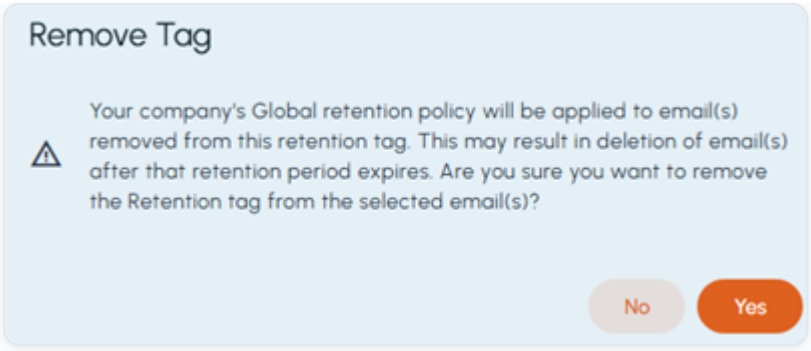
3. After completing the required action, verify that the expected result is reflected—for example, the selected tags are applied to the intended emails, the tag is updated or deleted, or the tagged emails are displayed.

Removing tags of an email

To remove tags of an individual email:

1. On the **Search result** pane, search for and select an email of which you want remove tags.
2. Hover over an email and click the **Remove Tag** icon.

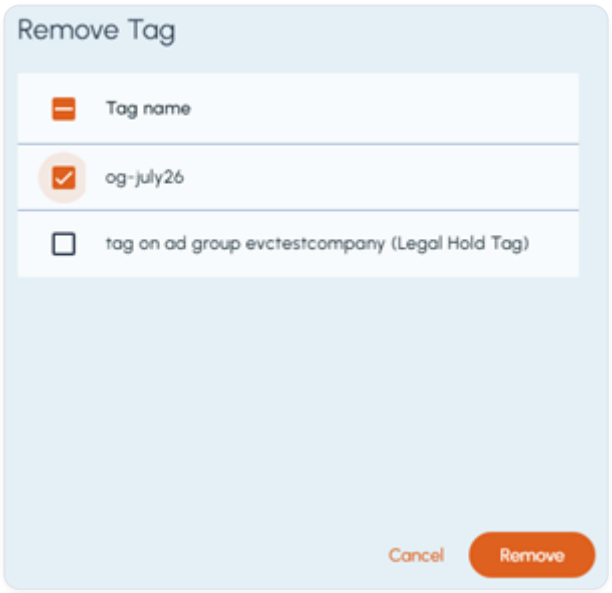
> **Note:** If you are removing a retention tag, the **Remove Tag** confirmation message appears.



Understand the warning. It states that when you remove a *Retention tag* from an email, the email starts following your company's Global retention policy. For example, if the Retention tag keeps the email for 7 years but the Global retention policy keeps emails for only 3 years, removing the tag may cause the email to become eligible for deletion after 3 years.

If you are sure of removing a tag, click **Yes**. Else, click **No** to abort the operation.

- If you are removing a normal tag, the **Remove Tag** window appears displaying the tags applied to this email.



Select the tags that you want to remove. Then, click **Remove**.

Saving emails

You can save an email to your local computer only when the corresponding action is enabled by your administrator. If the action is disabled, the **Save this message** option remains inaccessible.

To save an email:

1. On the **Search result** pane, search for and select the email.
2. Hover over the email, click the **More options** icon (kebab icon), and then select **Save this message**.

   The email is downloaded to the default **Downloads** folder, or you can choose a different location to save it.

Printing emails

You can print an email when the corresponding action is enabled by your administrator. If an action is disabled, the print option remains inaccessible.

To print an email:

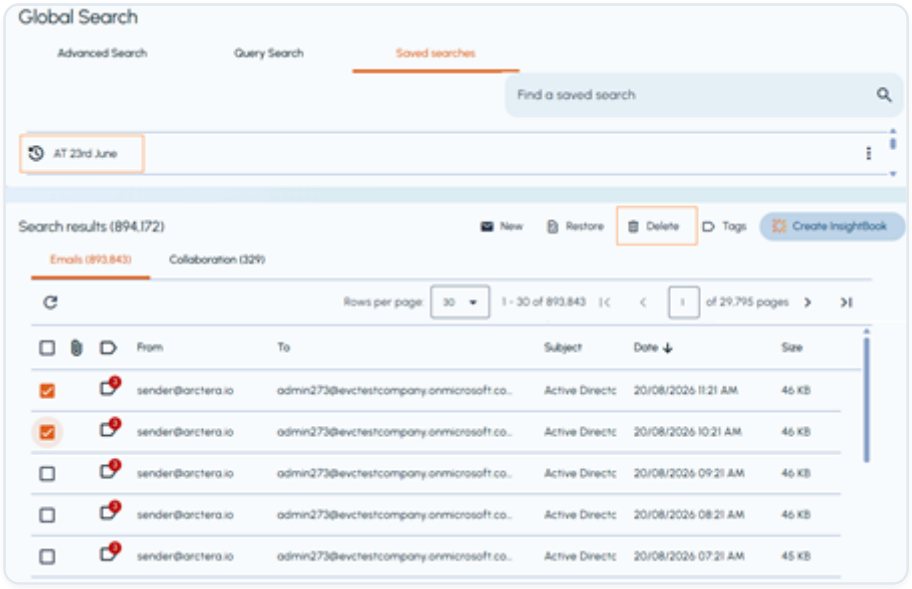
1. On the **Search result** pane, search for and select the email that you want to print.
2. Do any of the following:
   - Double-click the email to open it, and then click the **Print** icon from the toolbar.
   - Hover over the email, click the **Print** icon.
3. In the Print dialog box, select the required printer, configure the print settings as needed, and then click **Print**.

Deleting emails

You can permanently delete emails from the search result if these are no longer required.

To delete emails from search result:

1. On the **Search result** pane, select one or more emails you want to delete.
2. On the toolbar provided on the Search result pane, and click **Delete**.



A warning appears, informing you that the items will be permanently deleted and cannot be restored, and prompting you to confirm whether you want to continue.

3. Click **Yes** to permanently delete the saved searches. (To abort deletion, click **No**.)

Creating an InsightBook from a search

After performing an Advanced Search or Query Search, or opening a saved search, you can create a new InsightBook from the emails in the search results.

To create an InsightBook from a search result:

1. On the **Search result** pane, click **Create InsightBook**.
2. In the dialog box, enter a unique name and description for the InsightBook.
3. Click **Configure InsightAI** to select the content sources from the search results that you want to include in the InsightBook.

   The **InsightAI Configuration** dialog box appears and displays the following options:

   - **Emails:** Selected by default to include emails in the InsightBook. Clear this option to exclude emails.
   - **Include Attachments:** Not selected by default. Select this option to include email attachments in the InsightBook.
   - **Collab:** Selected by default to include collaboration messages in the InsightBook. Clear this option to exclude collaboration messages.

4. Click **Save**.
5. Verify that the newly created InsightBook appears on the dashboard.

To add an individual email to an existing InsightBook, see Moving emails to an InsightBook

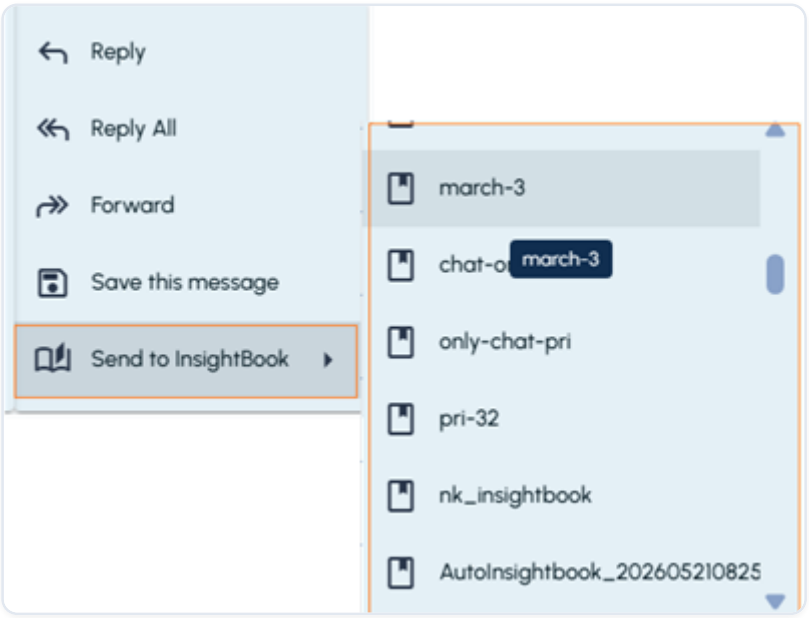
Moving emails to an InsightBook

You can move only one email at a time to an existing InsightBook.

To move an email to InsightBook:

1. On the **Search result** pane, search for and select the email.
2. Hover over the email, click the **More options** icon (kebab icon), and then select **Send to InsightBook**.

   The list of InsightBooks is displayed.



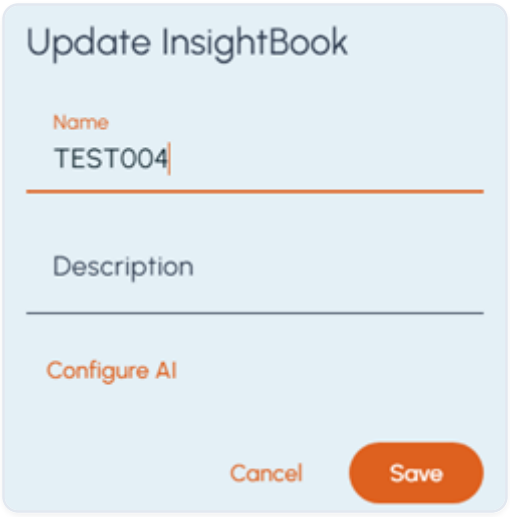
3. Select the required InsightBook. A notification confirms that the email was successfully moved to the selected InsightBook.

Managing Archives

This section includes the following topics:

- Understanding the role of Folder Sync in Personal Archive
- Viewing synchronized folders in Personal Archive
- About the Archives workspace
- Monitoring archive accounts
- Working with archived emails
  - Composing new emails
  - Viewing archived emails
  - Replying to and forwarding emails
  - Restoring emails
  - About tags
  - Creating new tags
  - Updating tags
  - Deleting tags
  - Applying tags to archived emails
  - Removing tags from archived emails
  - Saving emails
  - Printing archived emails
  - Sending archived email to InsightBook
- Exporting archived folder items

This is for testing purposes.



Understanding the role of Folder Sync in Personal Archive

Folder Sync is an add-on feature of Arctera Unified Platform that provides a read-only view of your Microsoft Outlook folder structure in Arctera Personal Archive. You cannot modify the folder structure or move archived messages between folders in the Arctera Personal Archive application.

After an administrator enables Folder Sync for your account in the Arctera Insight Management Console, your Outlook folder structure is replicated in the Arctera Personal Archive application. Subsequent synchronization events replicate folder changes made in Outlook according to the synchronization frequency configured by the administrator. Therefore, changes might take some time to appear in Arctera Personal Archive.

The following information addresses common questions about using Folder Sync in Arctera Personal Archive.

How often do synchronization events occur?

Your administrator configures the frequency of synchronization events. Contact your administrator for more information about the synchronization frequency.

How many folders can Folder Sync synchronize to Arctera Personal Archive?

Folder Sync can synchronize up to 10,000 folders per mailbox to Arctera Personal Archive.

Why is the Active Folders tab blank?

If the **Active Folders** tab is blank, Folder Sync might not be configured for your account. Contact your administrator for more information about configuring Folder Sync.

Why do the folders that I create in Microsoft Outlook not appear in Arctera Personal Archive?

Your administrator configures the frequency of synchronization events. Therefore, changes might take some time to appear in Arctera Personal Archive. Contact your administrator for more information about the synchronization frequency.

Where can I find my Microsoft Outlook contacts, tasks, and calendar items in Arctera Personal Archive?

Folder Sync does not synchronize contacts, tasks, or calendar items from Microsoft Outlook to Arctera Personal Archive.

Can I search for archived messages within a synchronized folder in Arctera Personal Archive?

No. You cannot search for archived messages within a synchronized folder because Folder Sync is intended only for viewing your Outlook folder structure.

Can I find the synchronized folder location of archived messages in search results?

No. Search results do not include the synchronized folder location of archived messages. To view the messages in a synchronized folder, select the folder in the **Active Folders** tab.

Why are my messages in different folders in Microsoft Outlook and Arctera Personal Archive?

Your administrator configures the frequency of synchronization events. Therefore, folder changes might take some time to appear in Arctera Personal Archive. Contact your administrator for more information about the synchronization frequency.

Do I receive a notification each time a synchronization event occurs?

No. Arctera Personal Archive does not notify you when a synchronization event occurs. However, the last synchronization time appears at the top of the **Active Folders** tab.

Viewing Synchronized Folders in Arctera Personal Archive

After an initial synchronization event, you can view your Microsoft Outlook folder structure in Arctera Personal Archive. During subsequent synchronization events, Folder Sync replicates any changes you make to your Outlook folder structure in Arctera Personal Archive.

> **Note:** Folder Sync does not synchronize the contacts, tasks, or calendar items from Microsoft Outlook to Arctera Personal Archive.

To view your synchronized folders:

1. In the left navigation pane, select **Archives**.
2. Select the archive accounts you want to view.

> **Note:** To view the delegate archive accounts folder structure, ensure that you have enabled the View *Delegate Folder Structure* option in the Arctera Management Console.

3. To hide the archive accounts folder that do not have data, click the **Hide Empty Folders** check box.
4. Click the sync icon to refresh the active folders view.
5. In the left pane, select the Active Folders tab to view the monitored and delegate archive accounts folder structure.

> **Note:** If you have over 4,000 synchronized monitored and delegate archive folders, the loading time in the Active Folders tab might take up to five minutes.

6. In the **Active Folders** tab, select a synchronized folder to view the archived messages inside that monitored or delegate archive folder in the message list.

About the Archives workspace

Archives are the collections of archived email messages that you can access and work with, based on your role and assigned permissions. The Archives workspace provides the following archive views:

VIEW	DESCRIPTION
All	This tab opens by default and displays the archive accounts available across the Personal, Review, and Delegate views in a single list.A label next to each archive account identifies whether it is a Personal, Review, or Delegate archive.Select **Refresh view** to reload the archive account list and view corresponding active folders.Upon selecting the required archive accounts, their folder structure is displayed under **Active**

VIEW	DESCRIPTION
	Folders.Select **Show selected** to display only the selected archive accounts and hide the others. The option changes to **Show all**. Select **Show all** to display all archive accounts.Use the pagination controls to navigate through multiple pages when the archive account list is extensive.
Personal	This tab displays your own archived email messages. You do not need any special permission to access the emails.Use the pagination controls to navigate through multiple pages when the archive account list is extensive.
Review	This tab appears only when you have the **Reviewer** role and at least one archive account is available for review.It provides you with the list of archive accounts that you are authorized to monitor as a reviewer.Use the pagination controls to navigate through multiple pages when the archive account list is extensive.Upon selecting the required archive accounts, their folder structure is displayed under **Active Folders**.
Delegate	This tab appears only when you have the **Synchronized delegate access** permission to at least one archive account.It provides you with the list of archive accounts that are delegated to you.Use the pagination controls to navigate through multiple pages when the archive account list is extensive.Upon selecting the required archive accounts, their folder structure is displayed under **Active Folders**.Delegate access is supported for both Office 365 and Exchange on-premises archive accounts.**Note:** If more than 4000 delegate archive folders are getting synchronized, the folders might take up to five minutes to load in

VIEW	DESCRIPTION
	the **Active Folders** section. Please wait for the folder list to appear.

After selecting the required archive accounts and browsing the required Active Folders, you can:

- Working with archived emails
- Export archived folder emails
- Review and download exports

Monitoring archive accounts

Use the **Archives** workspace to select the archive accounts that you want to monitor. The archive accounts are organized under the **All**, **Personal**, **Review**, and **Delegate** tabs.

The **Review** tab appears only when you have the **Reviewer** role and at least one archive account is available for review. The **Delegate** tab appears only when you have the **Synchronized delegate access** permission to at least one archive account.

After you select the required archive accounts, their folder structure is displayed under **Active Folders**.

To monitor archive accounts:

1. In the **Archives** workspace, select one of the following tabs:
    - **All**: Displays the archive accounts available across the **Personal**, **Review**, and **Delegate** tabs.
    - **Personal**: Displays your personal archive account.
    - **Review**: Displays the archive accounts that you are authorized to monitor as a reviewer.
    - **Delegate**: Displays the archive accounts that are delegated to you.
2. To locate an archive account, enter its name in the **Find name** box.
3. Select the archive accounts that you want to monitor.

> **Note:** You can exclude your personal archive only after selecting at least one other archive.

4. To display only the selected archive accounts, select **Show selected**. Select **Show all** to return to the complete archive account list.
5. Use the pagination controls to navigate through multiple pages when the archive account list is extensive.
6. To reload the archive account list, select **Refresh view**. The folder structures of the selected archive accounts appear under **Active Folders**.
7. Select a folder to view its archived email messages in the item grid.

Working with archived emails

Before you start working with emails, it is recommended to know about email grid controls. The email grid displays the archived emails available in the selected archive folders. The toolbar and navigation controls let you work with the email list.Access to these controls depend on the configuration set by your administrator for you. Some actions, such as tagging and restoring from the toolbar, support multiple selected emails.

Refer to the controls-specific description below.

Image image

CONTROLS	DESCRIPTION
Toolbar	Lets you compose a new email and perform actions on selected archived emails, such as restoring, deleting, and applying tags.
Search box	Lets you quickly search for archived emails by entering keywords. Enter the keywords, and then press **Enter**. Turn on **Filters** to refine the search results. Select **Filters**, expand the required filter categories, select the appropriate values, and then select **Apply**. Enabling search filters might affect search performance.
Advanced Search icon in the Search box	Lets you open the **Global Search** > **Advanced Searches** page, view the saved advanced searches available to you, and apply additional filters to refine the results.

CONTROLS	DESCRIPTION
Saved Searches icon in the Search box	Lets you open the **Global Search** > **Saved Searches** page and view the saved searches available to you. Select a saved search to display the corresponding emails and collaboration messages.
Toggle preview icon	Lets you show or hide the item preview pane.
Preview menu icon	Lets you position the item preview pane on the right or at the bottom.
Reload icon	Lets you reload the email list.
Pagination controls	Let you navigate through the available pages of emails. They also display the emails shown on the current page and the total number of emails.

You can perform the following actions:

- Composing new emails
- Viewing archived emails
- Replying to and forwarding emails
- Restoring emails
- About tags
- Creating new tags
- Updating tags
- Deleting tags
- Applying tags to archived emails
- Removing tags from archived emails
- Saving emails
- Printing archived emails
- Sending archived email to InsightBook

Changing your message view

By default, the email grid (emails list) displays all your messages archived using Arctera Unified Platform. You can change your message view to display only incoming or outgoing archived messages.

To change your message view:

1. Click the **All Email** drop-down that is located above the emails list.
2. Select one of the following options:

OPTION	DESCRIPTION
All Email	Select to display all archived messages.
Incoming	Select to only display archived messages you received.
Outgoing	Select to only display archived messages you sent.

Composing new emails

You can compose and send a new email only when the Send action is available. If your administrator disables this action, the **New** option is hidden.

To compose a new email:

1. On the email grid toolbar, select **New**.
2. In the new email tab, enter the recipients' email addresses in the **To**, **Cc**, or **Bcc** fields.
3. To include an attachment, select **Attach a file**, and then select the required file.

> **Note:** You can attach files of up to 4 MB.

4. Enter the subject and body text of the email.
5. Click the **Send** icon.

   If a recipient does not receive the email, ask them to check their junk mail folder.

Viewing archived emails

You can view any email that is listed in your Arctera Personal Archive archived folders.

To view archived emails:

1. On In the email list, select the archived email that you want to view.

   The email details appear in the item preview pane.
2. To adjust the preview pane, do any of the following:

   - Select the **Toggle preview** icon to show or hide the preview pane.
   - Select the **Preview menu** icon to position the preview pane on the right or at the bottom.

Replying to and forwarding emails

You can reply to the sender, reply to all recipients, or forward an email only when the corresponding action is enabled by your administrator. If an action is disabled, the associated Reply, Reply All, or Forward option remains inaccessible.

To reply to or forward an email:

1. On the email grid, search for and select the email that you want to reply to or forward.
2. Do any of the following:

   - Double-click the email to open it, and then select **Reply**, **Reply All**, or **Forward** from the toolbar.
   - Hover over the email, click the **More options** icon (kebab icon), and then select **Reply**, **Reply All**, or **Forward**.
3. Verify or specify the recipients in the To, Cc, and Bcc fields, as applicable.
4. Compose your message.
5. To add an attachment, click **Attachment**, and then select the required file. You can attach files up to **4 MB**.
6. Click the **Send** icon.

Restoring emails

Important!

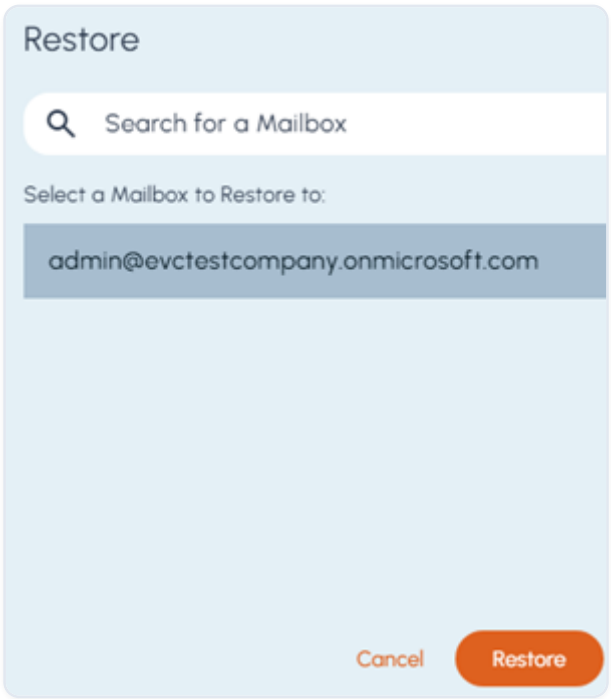
Before restoring emails from Arctera Personal Archive to your Outlook mailbox, it is important to understand how timestamps are displayed in classic Outlook for Windows and new Outlook for Windows.

When an email is restored from Personal Archive to your inbox, the date displayed for the restored email differs between classic Outlook for Windows and new Outlook for Windows. When an email is restored to classic Outlook for Windows, the email retains its original sent date, and the restoration date is not displayed. In new Outlook for Windows, the date and time of restoration are displayed as the email timestamp. This difference is expected and results from Outlook behavior.

Restoring an individual email

To restore an individual email:

1. On the email grid, search for and select an email you want to restore.
2. Hover over an email and click the **Restore this message** icon. The **Restore** window appears.

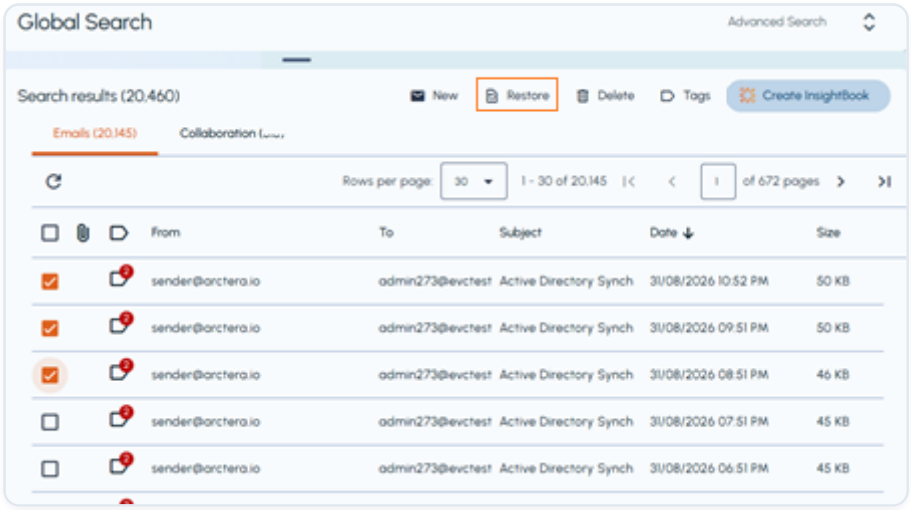


3. Search for and select the required mailbox, and click **Restore**.

Restoring multiple emails

To restore multiple emails:

1. On the email grid, search for and select one or more emails you want to restore.



2. On the toolbar, click **Restore**.
3. After restoring, verify that the expected result is reflected.

About tags

You can apply the following types of tags to archived messages in Arctera Personal Archive:

TAG TYPE	DESCRIPTION
Personal tag	Lets you identify archived messages or group related archived messages by applying a single tag. You can create, edit, and delete personal tags in Arctera Personal Archive. See Creating new tags
Legal hold tag	Lets reviewers or administrators place archived messages on legal hold. See Creating Legal Hold tags
Retention tag	Lets you or your administrator prevent archived messages from being deleted from Arctera Unified Platform. Your administrator creates and manages retention tags, so you cannot create, edit, or delete them in Arctera Personal Archive. You can use only the retention tags that your administrator has granted you permission to use. For detailed instructions on creating, applying, deleting, and modifying the retention policy for managed tags, refer to the *About Managed Tags* section in the Arctera Management Console Help.

Creating new tags

You can create a new personal tag only while applying it to an archived email.

To create a new tag:

1. On the email grid, hover over the archived email, and then select the **Tag** icon.
2. In the **Apply tags** pane, select **Add new tag**.
3. Enter a name in the **Tag name** field.
4. Enter a description in the **Description** field.
5. Select **Apply**.

   The personal tag gets created and applied to the selected email.

Creating Legal Hold tags

You can create a legal hold tag to place relevant archived messages on legal hold only if you are a reviewer or administrator with the required permissions.

To create a legal hold tag:

1. On the email grid toolbar, select **Tags**, and then select **Update tag**.
2. Search for and select the tag that you want to convert to legal hold tag.

   The Legal Hold Tag checkbox is enabled only after you select a tag.
3. Update the tag name and description.
4. Select the **Legal Hold Tag** checkbox.
5. Select **Update**.

   The selected tag is converted to a legal hold tag.

Updating tags

You can update a tag when its name or description no longer clearly represents its purpose or the archived messages associated with it.

To update a tag:

1. On the email grid toolbar, select **Tags**, and then select **Update tag**.
2. Search for and select the tag that you want to update.
3. Update the tag name.

> **Note:** The tag name can contain up to 50 characters.

4. Update the description.

> **Note:** The description can contain up to 200 characters.

5. To make this tag a legal hold tag, select the **Legal Hold Tag** check box.
6. Click **Update**.

Deleting tags

You can delete the tags that you no longer need in Arctera Personal Archive.

To delete a tag:

1. On the email grid toolbar, select **Tags**, and then click **Delete Tag**.
2. In the Delete Tag window, select the tag you want to delete.
3. Click **Delete**.
4. In the **Delete Tag** confirmation window, click **Yes**.

Applying tags to archived emails

You can apply tags to identify archived emails, categorize emails by a common subject or purpose, place them on legal hold, or prevent their deletion, depending on the tag type. You can apply an existing tag or create and apply a new personal tag while working with the emails.

Applying a tag to an individual email

You can apply a tag directly from an email row.

1. On the email grid, hover over the required email.
2. Select the **Tag** icon.
3. Search for and select the required tag.
4. Select **Apply**.

The tag is applied to the email.

Applying a tag to one or more selected emails

You can apply the same tag to one or more emails selected On the email grid.

1. Select the required emails, if applicable.
2. On the toolbar, select **Tags**.
3. Search for and select the required tag.
4. Select one of the following options:
    - **Tag selected emails**—Applies the tag to the selected emails.
    - **Tag current page**—Applies the tag to all emails on the current page.
    - **Tag all emails**—Applies the tag to all emails in the search results.

The tag is applied to the specified emails.

Removing tags from archived emails

You can remove one or more tags, which are no longer required, from an archived email.

To remove tags from an archived email:

1. On the email grid, hover over the tagged email, and then select the **Remove Tag** icon.
2. In the **Remove Tag** pane, select the tags that you want to remove.
3. Select **Remove**.
4. In the confirmation dialog, select **Yes**.

The selected tags gets removed from the archived email.

Saving emails

You can save a copy of an archived email to your computer unless your administrator disables the Save action. You can save only one email at a time. If you select multiple emails and then select Save this message for a specific email, only that email is saved.

To save an archived email:

1. On the email grid, hover over the archived email. The toolbar appears.
2. Select the kebab icon, and then select **Save this message**.
3. In the **File Download** window, select **Save**.

> **Note:** You can select **Open** to open the email before saving it to verify it.

> The archived email is saved to your **Downloads** folder.

Printing archived emails

You can print an archived email unless your administrator disables the Print action. You can print only one email at a time. If you select multiple emails and then select Print this message for a specific email, only that email is printed.

To print an archived email:

1. On the email grid, hover over the archived email.
2. Select the **More options** icon (kebab icon), and then select **Print this message**.

Sending archived email to InsightBook

You can send an archived email to an InsightBook to include it in a curated collection for contextual analysis. The **Send to InsightBook** option is available only when Personal Archive InsightBooks option is enabled for the application and configured for your account.

Within the InsightBook, you can analyze the email with related communications, use AI-powered queries, summarize key topics, extract action items, and review trends.

To send archived email to InsightBook:

1. On the email grid, select the archived email. Only one email ayt a time can be moved to InsightBook.
2. Hover over the email row to display the available actions.
3. Select the **More actions** icon (kebab icon), and then select **Send to InsightBook**.
4. From the list, select the required InsightBook.

   The archived email is sent to the selected InsightBook.

Exporting archived account items

You can export items of folders from the selected archives. Upon successful export, the exported items will be downloaded in one or more file segments. For detailed procedure, see Exporting archived folder emails

Managing collaboration messages

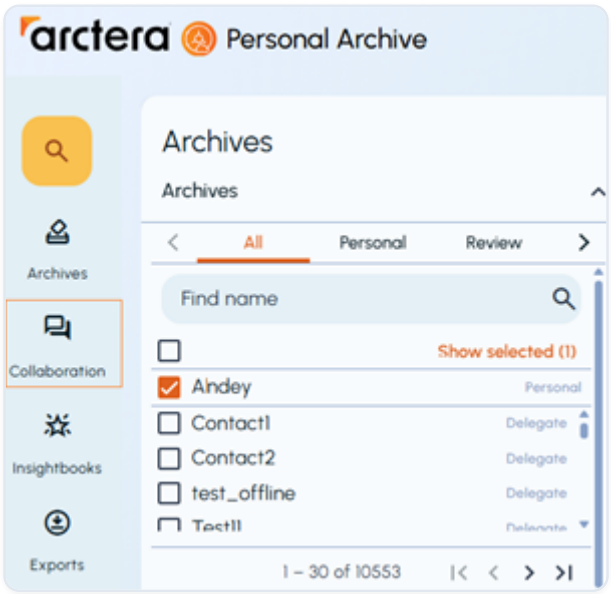
This section includes the following topics:

- Viewing collaboration messages

Viewing collaboration messages

Users can view collaboration messages in Personal Archive only when the following conditions are met in Arctera Management Console:

- The *Enable Collaboration View for Personal Archive* service is enabled for customer/tenant.
- Collaboration tools such as Microsoft Teams, Slack, or other supported platforms are integrated and their services are enabled for customer/tenant.

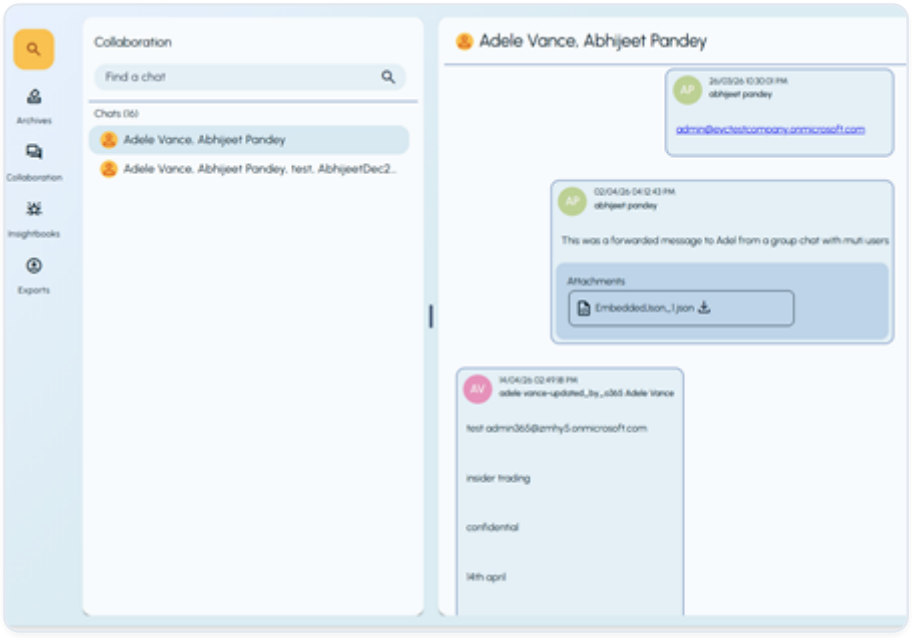


For any assistance about this, contact your system administrator.

To view collaboration messages:

1. In the left pane, select the **Collaboration** tab.
2. In the chatroom list, select the chat you want to view.

   Chat messages are displayed in the right pane as shown in the sample image below.



3. If the chatroom list is extensive, enter keywords in the **Search Chat Names** field, and click the **Search** icon to locate the required chatroom. Click it to view the messages.

Managing InsightBooks

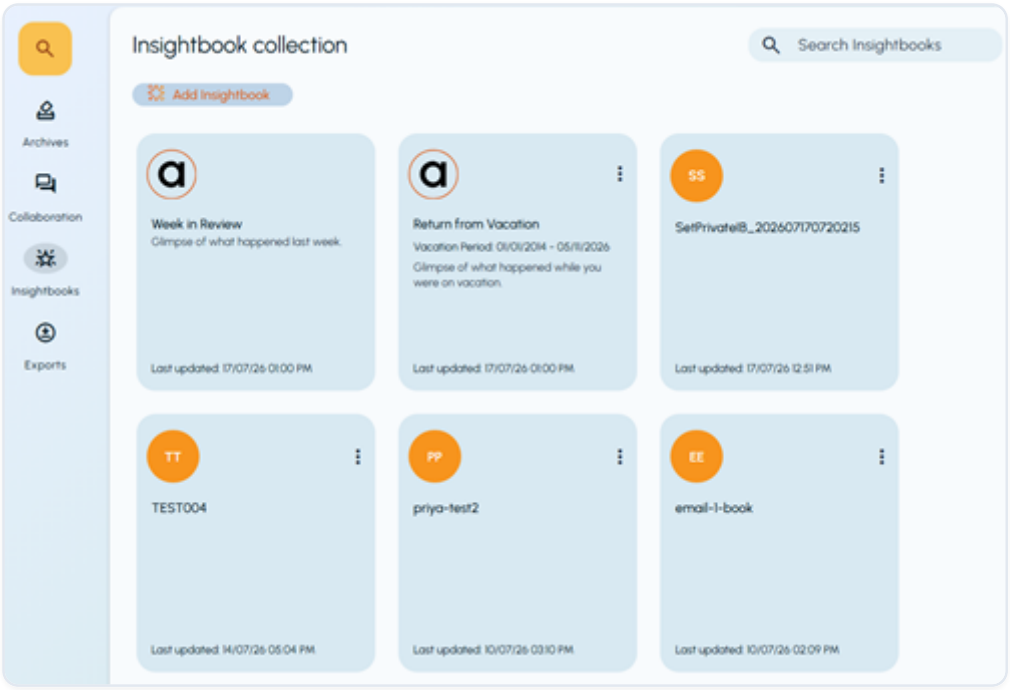
This section includes the following topics:

- About InsightBooks
- Accessing InsightBooks
- Creating InsightBooks
- Updating InsightBooks
- Deleting InsightBooks
- Sharing InsightBooks
- Creating Notes in InsightBooks
- Unsubscribing InsightBooks
- Setting a vacation period

About InsightBooks

Overview

The **InsightBooks** feature organizes emails and collaboration messages into curated collections based on search criteria. It enables contextual analysis and targeted responses through AI-powered queries. Users can create new InsightBooks or access default ones, such as Week in Review and Return from Vacation, for quick review and insights. Refer to the sample image below.



InsightAI analysis is limited to Emails and Collaboration messages analysis within an InsightBook. The InsightBooks feature streamlines the process of analyzing communications by allowing users to apply GenAI prompts (as it is integrated with InsightAI) to summarize key topics, extract action items, or review trends. It improves productivity by consolidating relevant messages into one place that enables users to catch up efficiently after a break or review past activity with minimal effort. Sharing and collaboration options allow teams to use common filters and notes for consistent understanding. Shared InsightBooks can be updated or deleted only by their creators, and AI-generated notes are read-only.

Prerequisites

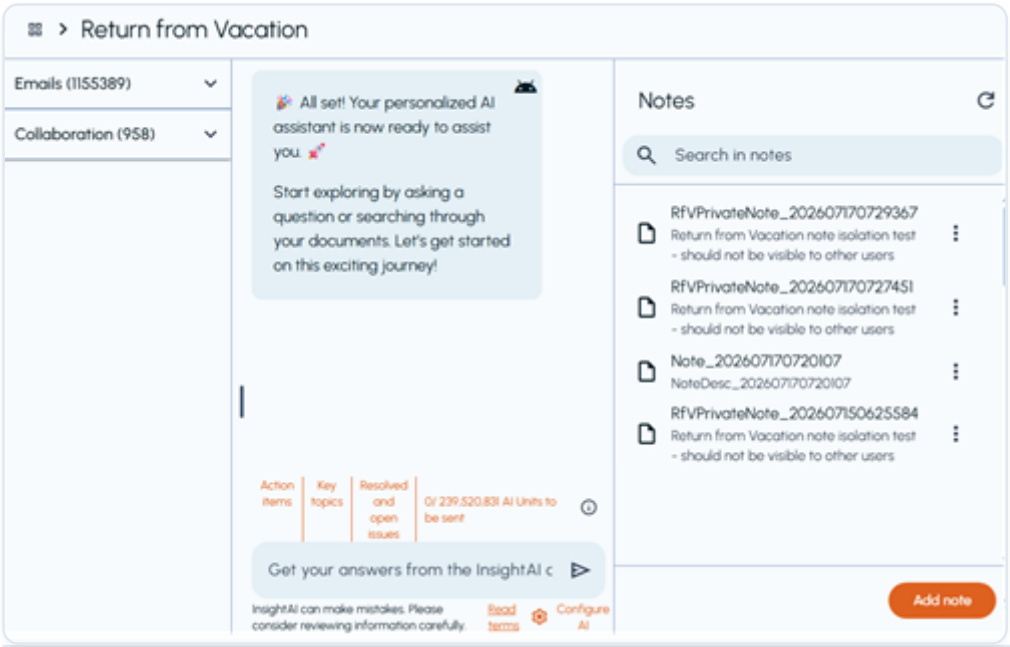
The InsightBooks feature is available if:

- Application level setting: The Arctera Management Console administrator enables the Personal Archive InsightBooks archive option in **Management Console** > **Policy Management** > **Archive Options**.
- User account level setting: After application level setting is enabled, the Manage InsightBooks setting is configured in **Management Console** > **Configuration** > **Manage InsightBooks**.

  For more details, refer to the Arctera Management Console Help.

Understanding InsightBook interface

When you open an InsightBook, the following primary panels are displayed:



PANE	DESCRIPTION
Left pane	Displays the emails and collaboration items included in the InsightBook. The items are grouped under **Emails** and **Collaboration**, with the corresponding item counts displayed for quick reference.
Middle pane	Displays the default prompts, including **Summarize**, **Summarize by speakers**, **Topics**, **Sentiment**, **Timeline**, and **Timeline Table**. You can also enter custom prompts in the input box at the bottom, save AI-generated responses as notes, and view the number of AI units consumed.
Right pane	Lets you add, view, and search for notes related to the InsightBook. You can save AI-generated responses as notes for future reference and mark notes as private.

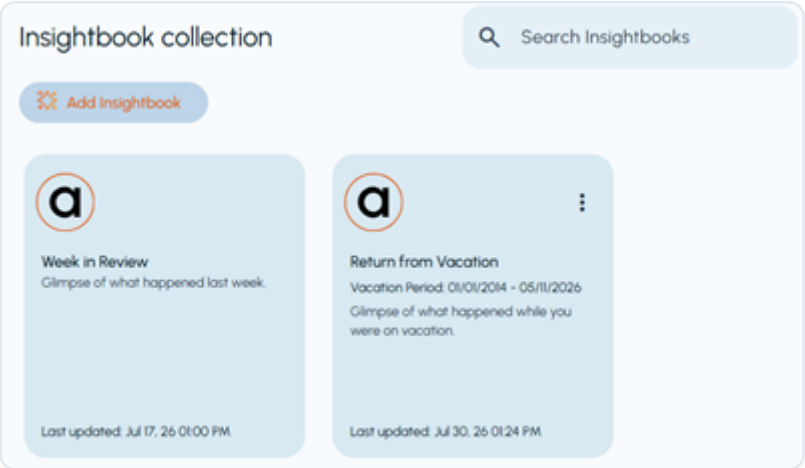
Accessing InsightBooks

You can access InsightBooks that either you created or that others shared with you. The InsightBooks Collection page lets you access the default InsightBooks and search the a specific InsightBook from the collection.

To access and search InsightBooks:

1. In the left navigation pane, select **InsightBooks**.

   The **InsightBooks Collection** page appears. When you access the collection for the first time, the following InsightBooks are available by default:



DEFAULT INSIGHTBOOK	DESCRIPTION
Week in Review	Automatically collects emails and collaboration messages received during the previous week, from Monday through Sunday. It helps you review recent communications and identify important discussions or updates without manually filtering individual items.
Return from Vacation	Collects emails and collaboration messages received during a vacation period that you specify. When you return, it provides a consolidated summary of communications received while you were away, helping you identify important or urgent items before reviewing individual messages. See Setting a vacation period.

2. In the **Search InsightBooks** field, enter the InsightBook name or a related keyword.

   The collection is filtered to display matching InsightBooks.

3. Select the required InsightBook from the filtered results.

Creating InsightBooks

You can create a new InsightBook to collect and analyze emails and collaboration items based on specific search criteria.

To create a new InsightBook:

1. In the left navigation pane, select **InsightBooks**.
2. On the **InsightBook Collection** page, click **Add InsightBook**.

   The **Global Search** page appears and displays the following tabs:

   - **Advanced Search:** Lets you configure search conditions and specify whether to search emails, collaboration messages, or both.
   - **Query Search:** Lets you enter a query and specify whether to search emails, collaboration messages, or both.
   - **Saved Searches:** Lets you search for and select from the available saved searches.
3. Use one of the following search methods:

   Advanced Search

   a. On the **Advanced Search** tab, click **Archives**.

   ```
   The **Select Archives** dialog box appears.
   ```

   b. Select the **All**, **Personal**, **Review**, or **Delegate** tab to display the corresponding archives.

   c. Search for and select the archives in which you want to perform the advanced search.

   ```
   - To move between pages and view the archives listed on each page, use the pagination controls.

   - To view only the selected archives, click **Show selected**. The option changes to **Show all**, which you can click to display both selected and unselected archives.
   ```

   d. Click **Apply** to add the selected archives to the **Archives** section.

e. Under **Scope**, select **All** to search both emails and collaboration messages, **Emails** to search only emails, or **Collaboration** to search only collaboration messages in the selected archives.

f. Configure the search criterion.

```
One search condition is displayed by default.



- To define an additional search condition, click **Add Condition**.

- To remove a condition, click the **Remove** icon in the corresponding row.

- When multiple conditions are configured, select the Boolean operator **AND** to return items that match all conditions or **OR** to return items that match at least one condition.

- To clear the configured search criteria and start again, click **Reset**.
```

g. Click **Search**.

```
The **Advanced Search** section collapses, and the matching items appear in the **Search results** section.



- To open an email and view its complete contents, double-click it.

- To reopen the section and review the configured search criteria, click the **Expand** icon in the upper-right corner of the page. The icon changes to **Collapse**.

- To minimize the search criteria again, click the **Collapse** icon.

- To adjust the height of either section manually, drag the resize handle between the **Advanced Search** and **Search results** sections up or down.
```

Query Search

a. Select the **Query Search** tab.

b. Click **Archives**.

```
The **Select Archives** dialog box appears.
```

c. Select the **All**, **Personal**, **Review**, or **Delegate** tab to display the corresponding archives.

d. Search for and select the archives in which you want to perform the query search.

```
- To move between pages and view the archives listed on each page, use
the pagination controls.

- To view only the selected archives, click **Show selected**. The
option changes to **Show all**, which you can click to display both
selected and unselected archives.
```

e. Click **Apply** to add the selected archives to the **Archives** section.

f. Under **Scope**, select **All** to search both emails and collaboration messages, **Emails** to search only emails, or **Collaboration** to search only collaboration messages in the selected archives.

g. Enter the query.

h. Click **Search**.

```
The **Query Search** section collapses, and the matching items appear
in the **Search results** section.



- To open an email and view its complete contents, double-click it.

- To reopen the section and review the configured query, click the
**Expand** icon in the upper-right corner of the page. The icon changes
to **Collapse**.

- To minimize the query again, click the **Collapse** icon.

- To adjust the height of either section manually, drag the resize
```

```
handle between the **Query Search** and **Search results** sections up
or down.
```

Saved Searches

a. Select the **Saved Searches** tab.

```
A list of saved searches appears.
```

b. Search for and select a saved search to view its items in the **Search results** section.

```
- To modify a saved search, click the **Kebab** icon in the
corresponding row, and then select **Save/Update Search**.

- To delete a saved search, click the **Kebab** icon in the
corresponding row, and then select **Delete Search**.



The **Saved Searches** section collapses, and the matching items appear
in the **Search results** section.



- To open an email and view its complete contents, double-click it.

- To reopen the section and review the selected saved search, click the
**Expand** icon in the upper-right corner of the page. The icon changes
to **Collapse**.

- To minimize the section again, click the **Collapse** icon.

- To adjust the height of either section manually, drag the resize
handle between the **Saved Searches** and **Search results** sections
up or down.
```

4. Click **Create InsightBook**.
5. In the dialog box, enter a unique name and description for the InsightBook.
6. Click **Configure InsightAI** to select the content sources from the search results that you want to include in the InsightBook.

The **InsightAI Configuration** dialog box appears and displays the following options:

- **Emails:** Selected by default to include emails in the InsightBook. Clear this option to exclude emails.
- **Include Attachments:** Not selected by default. Select this option to include email attachments in the InsightBook.
- **Collab:** Selected by default to include collaboration messages in the InsightBook. Clear this option to exclude collaboration messages.

7. Click **Save**.
8. Verify that the newly created InsightBook appears on the dashboard.

Updating InsightBooks

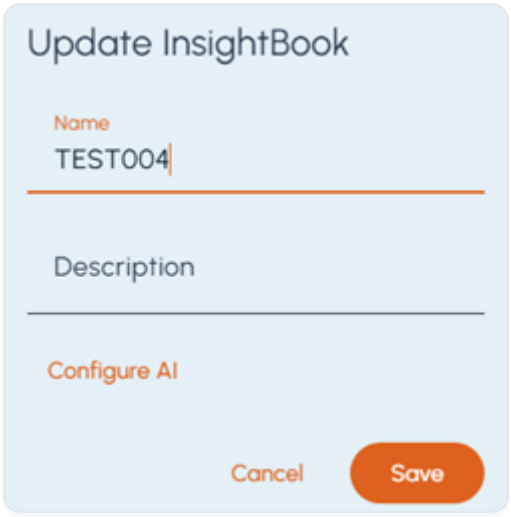
Only the InsightBook owner can update it; shared users cannot perform this action. Updating an InsightBook lets the owner modify its name, description, and InsightAI configuration.

To update an InsightBook:

1. In the left navigation pane, select **InsightBooks**.

   The **InsightBooks Collection** page appears.
2. Locate the InsightBook that you want to update.
3. Click the **More options** icon (kebab icon) on the InsightBook card, and then select **Update**.

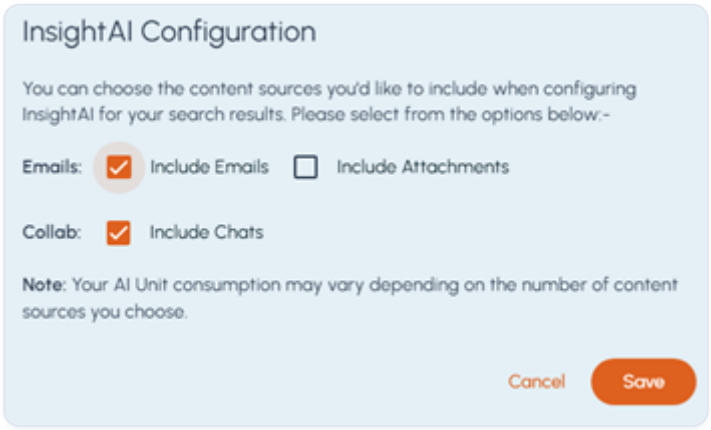
   The **Update InsightBook** dialog box appears.



4. Modify the InsightBook name and description as required.

5. To update the content sources included in the InsightBook, click **Configure InsightAI**.

   The **InsightAI Configuration** dialog box appears.



6. Select or clear the following options as required:

   - **Emails:** Selected by default to include emails in the InsightBook. Clear this option to exclude emails.
   - **Include Attachments:** Not selected by default. Select this option to include email attachments in the InsightBook.
   - **Collab:** Selected by default to include collaboration messages in the InsightBook. Clear this option to exclude collaboration messages.

7. Click **Save** in the **InsightAI Configuration** dialog box.
8. Click **Save** in the **Update InsightBook** dialog box.

   A notification is displayed to confirm that the InsightBook is updated successfully.

Deleting InsightBooks

Only the InsightBook owner can delete it; shared users cannot perform this action. Deleting an InsightBook permanently removes it.

To delete an InsightBook:

1. In the left navigation pane, select **InsightBooks**.

   The **InsightBooks Collection** page appears.

2. Locate the InsightBook that you want to delete.
3. Click the **More options** icon (kebab icon) on the InsightBook card, and then select **Delete**.

The confirmation dialog box appears.

4. Click **Yes** to delete the InsightBook, or click **No** to abort deleting it.

   A notification is displayed to confirm that the InsightBook is deleted successfully.

Sharing InsightBooks

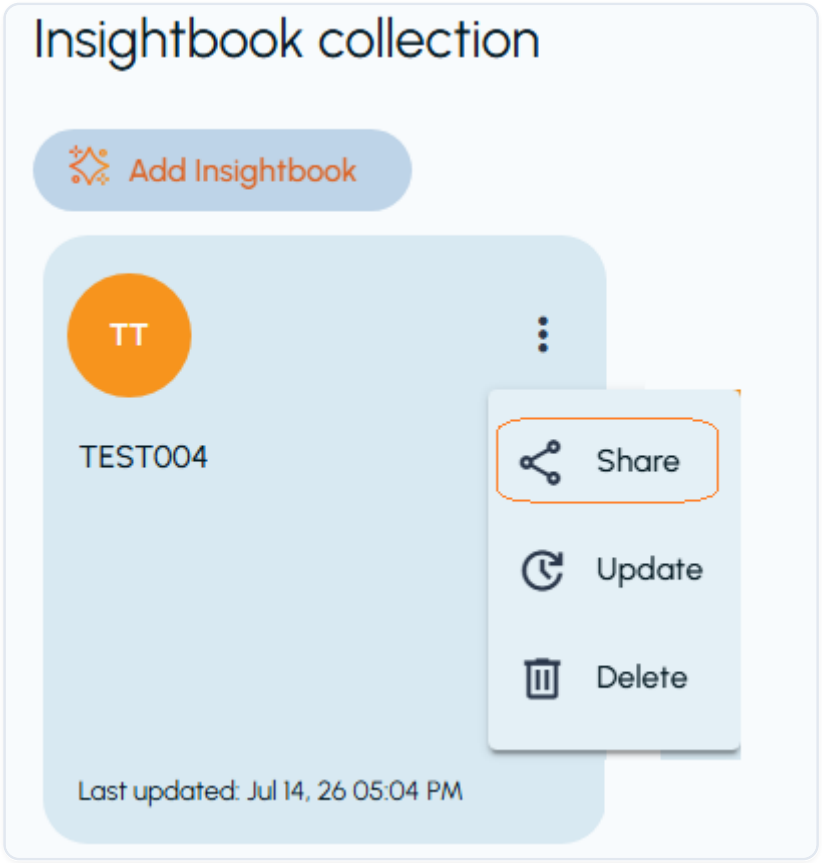
You can share an InsightBook with other users to provide them access to the same collection of emails, collaboration messages, and analysis. The shared InsightBook appears in the recipients' InsightBooks Collection, while the original creator remains its owner. Recipients can view notes associated with the shared InsightBook unless those notes are marked as private. Only the note-author can delete a shared note or change its privacy setting.

To share an InsightBook:

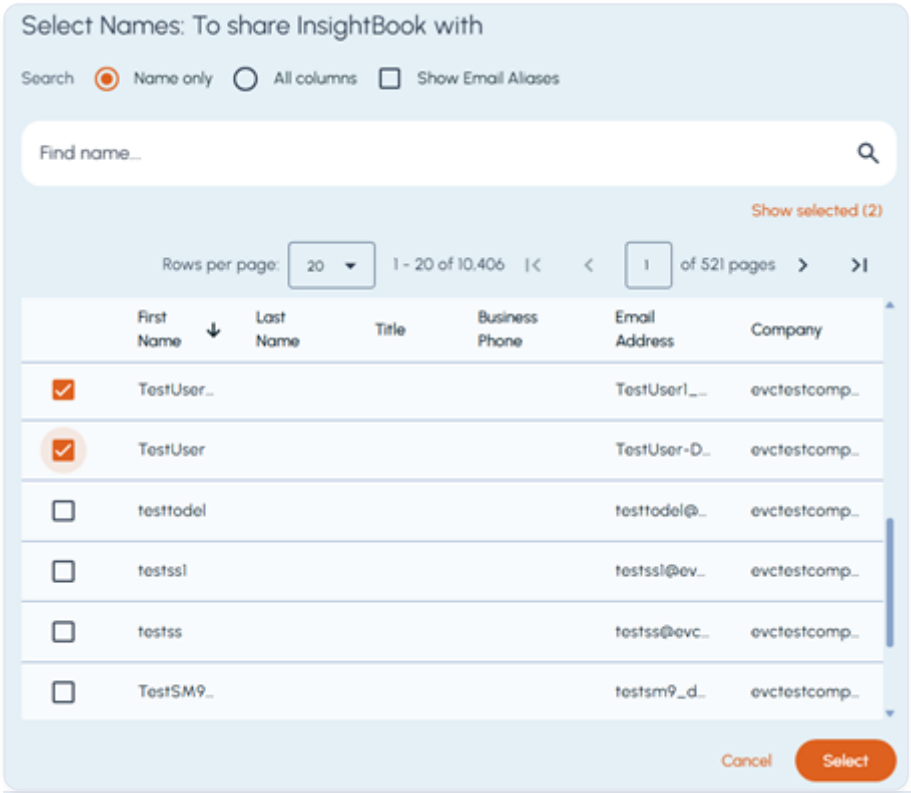
1. In the left navigation pane, select **InsightBooks**.

   The **InsightBooks Collection** page appears.

2. Locate the InsightBook you want to share.
3. Click the **More options** icon (kebab icon) on the InsightBook card, and then select **Share**.



The **Select Names: To share InsightBook with** dialog box appears.



FIELD	DESCRIPTION
Search field	Lets you enter a name or other user information and click the **Search** icon to find matching users based on the selected search option.
Name only	Limits the search to the **First Name** and **Last Name** columns.
All columns	Searches information from the search field across all columns displayed in the user list.
Show Email Aliases	Displays email aliases in the user list and includes them when searching across all columns.
Show selected	Displays only the selected users. The number in parentheses indicates the total number of selected users. The option changes to **Show all**, which you can click to display both selected and unselected users.

FIELD	DESCRIPTION
Pagination controls	Let you specify the number of rows displayed per page, move between pages, and view the current range and total number of users.

4. Click **Select**.

   The confirmation dialog box appears.

5. Click **Yes** to share the InsightBook with the selected users, or click **No** to abort sharing.

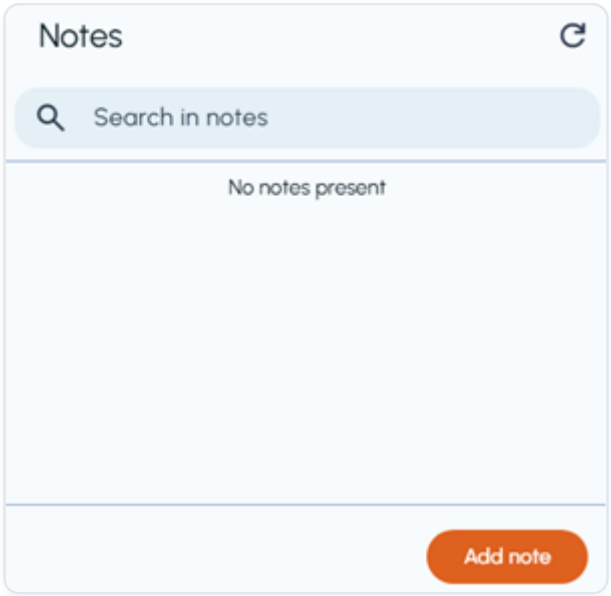
Creating Notes in InsightBooks

You can create notes in an InsightBook by manually adding a note or by saving an InsightAI-generated response as a note.

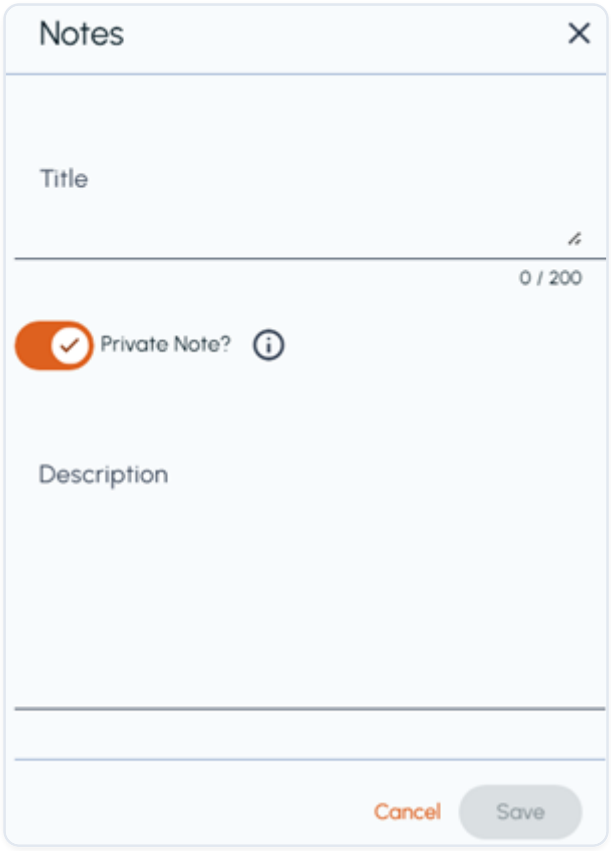
In a shared InsightBook, co-workers can view notes added by the author unless the notes are marked as private. Only the author can delete a shared note or change its privacy setting. Notes in the default folders, **Week in Review** and **Return from Vacation**, cannot be marked as private.

To create a note manually:

1. Open the InsightBook and navigate to the **Notes** pane.



2. In the **Notes** pane, click **Add note**.

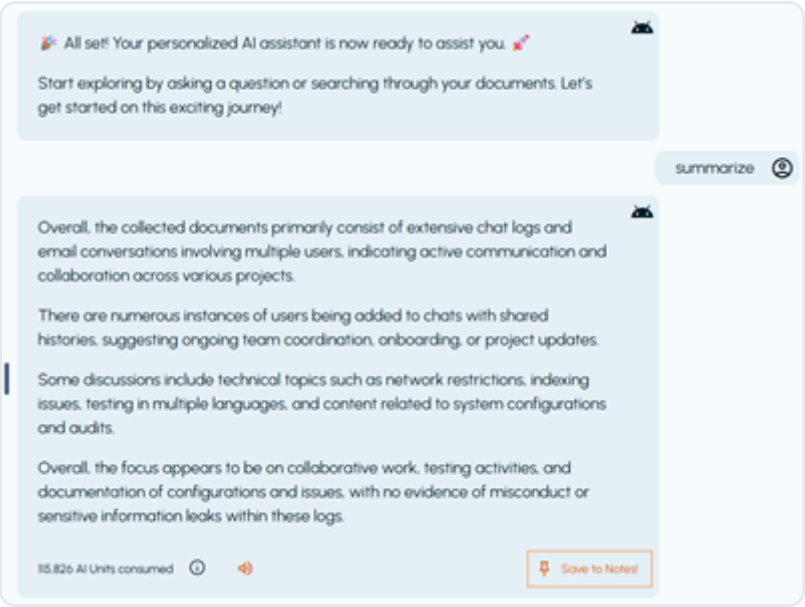


3. Enter a unique title of up to 200 characters.
4. Enter a description for the note.
5. To make the note private, turn on the **Private Note?** switch.
6. Click **Save**.

   The note appears in the **Notes** pane.

To create a note from an InsightAI-generated response:

1. Open the InsightBook.
2. In the middle pane, enter a prompt for the information that you want InsightAI to analyze.



3. After InsightAI generates the response, click **Save to Notes!** in the response pane.
4. To make the note private, turn on the **Private Note?** switch.

> **Note:** Notes in the default folders, **Week in Review** and **Return from Vacation**, cannot be marked as private.

5. Click **Save**.

   The generated response is saved as a note and appears in the **Notes** pane.

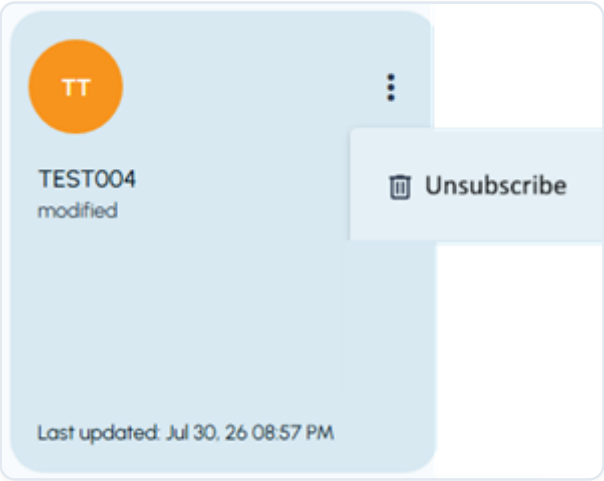
Unsubscribing InsightBooks

Only the user with whom an InsightBook is shared can choose to unsubscribe it. This action removes the shared InsightBook from their list, but it remains available to other users and the author.

To unsubscribe an InsightBook:

1. In the left navigation pane, select **InsightBooks**.

   The **InsightBooks Collection** page appears.
2. Locate the InsightBook that is shared with you but you want to unsubscribe it.
3. Click the **More options** icon (kebab icon) on the InsightBook card, and then select **Unsubscribe**.



The confirmation dialog box appears.

4. Click **Yes** to unsubscribe the shared InsightBook, or click **No** to abort unsubscribing it.

   A notification is displayed to confirm that the InsightBook is unsubscribed successfully.

Setting a vacation period

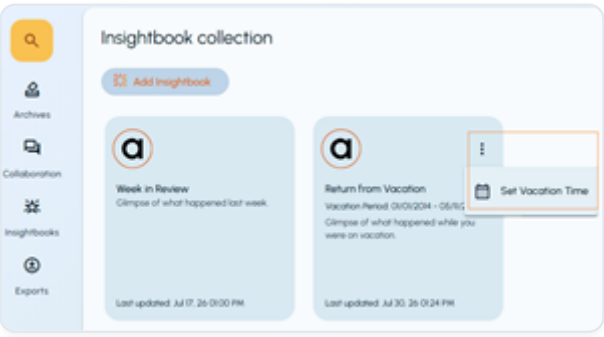
You can configure a vacation period in the **Return from Vacation** InsightBook before you leave. When you return, this InsightBook provides a consolidated summary of the emails and collaboration messages received during that period. It lets you identify important or urgent conversations, decisions, and follow-up actions before reviewing and responding to individual items.

To set a vacation period:

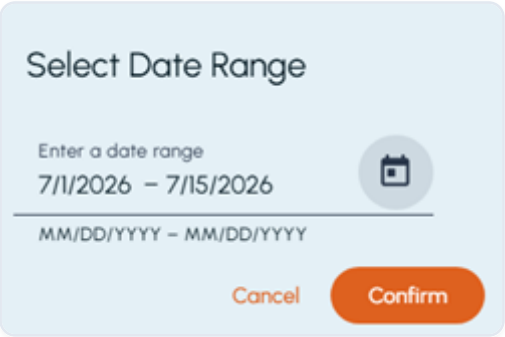
1. In the left navigation pane, select **InsightBooks**.

   The **InsightBooks Collection** page appears.

2. Locate the **Return from Vacation** InsightBook.
3. Click the **More options** icon (kebab icon) on the InsightBook card, and then select **Set Vacation Time**.



4. Specify the start and end dates of your vacation period.



5. Click **Confirm**.

Managing exports

This section includes the following topics:

- Exporting archived folder emails
- Reviewing exports and downloading items

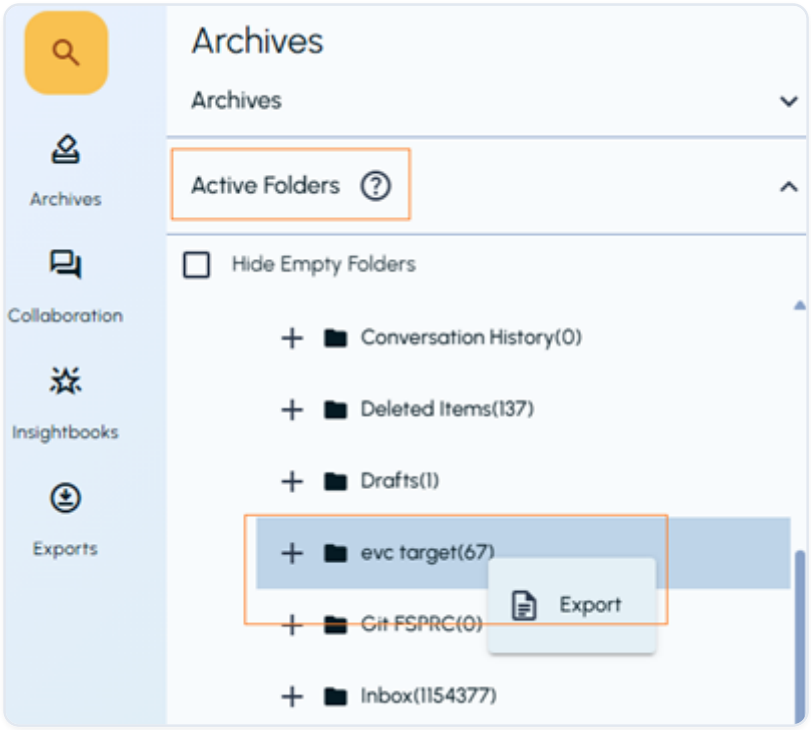
Exporting archived folder emails

You can export items of folders from the selected archives. Upon successful export, the exported items will be downloaded in one or more file segments.

To export archive folder items:

1. In the left navigation pane, select **Archives**.
2. Search for and select the required Archive. For more details about global search options, see Managing global searches
3. Expand the **Active Folders** or **Folders** sections to view all the folders from the selected archives.

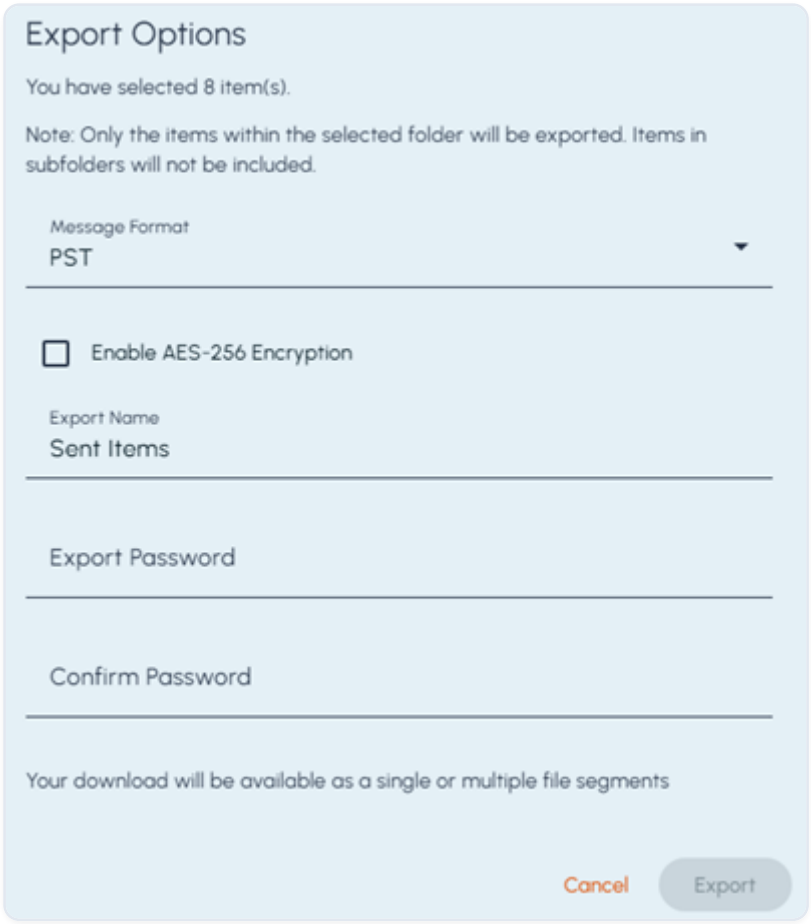
   Ensure that the folders should not be empty if you want to export them. To hide empty folders, select the **Hide Empty Folders** check box.
4. Right-click on the folder name and click **Export**.



The **Select Date Range** dialog box appears

5. Click the **Calender** icon to specify the date range to export items exchanged between these dates.

   The **Export Options** dialog box appears.



6. Specify the following information:

FIELD	DESCRIPTION
Message Format	Select the format in which you want to export the items. By default, **PST** is selected.
Enable AES-256 Encryption	Select this option to encrypt the exported files using AES-256 encryption. You must then enter and confirm an export password.
Export Name	Enter a name for the export.
Export Password	Enter the password to protect the encrypted export.
Confirm Password	Re-enter the export password. The value must match the password entered in the **Export Password** field.

7. Click **Export**.
8. Save the export file to the required location on your computer.

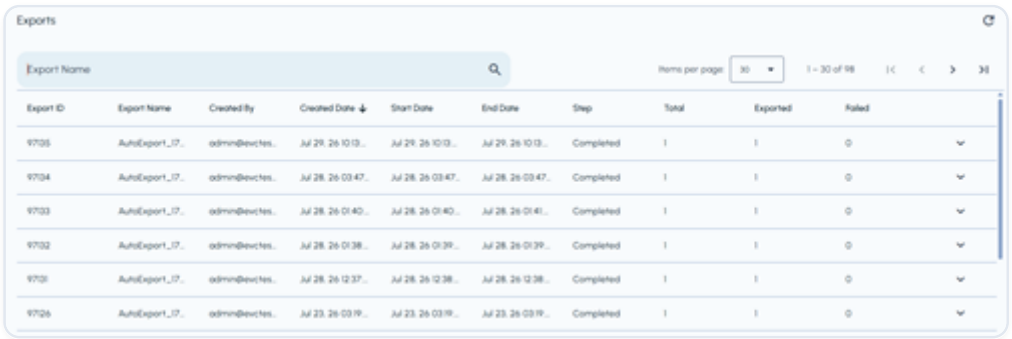
Reviewing exports and downloading items

You can review the export details and download items (emails and collaboration messages) of the exports.

To review export details and download items:

1. In the left navigation pane, select **Exports**.

   A list of created exports and corresponding details appears.



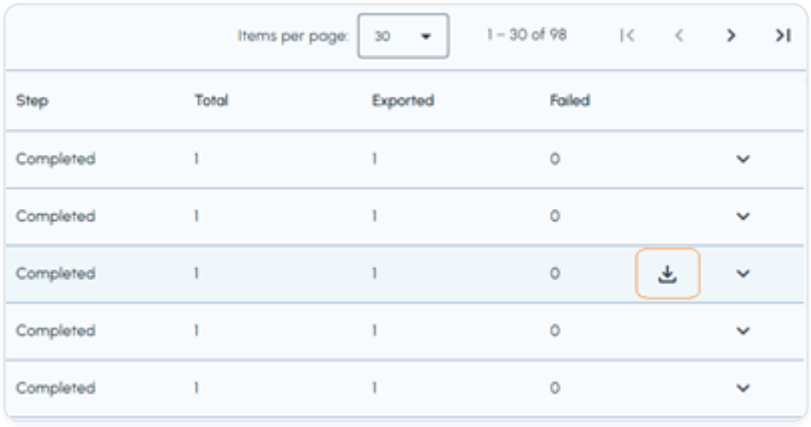
- Use the column headings to identify each export, review who created it and when it ran, track its status, and compare the total, exported, and failed item counts.
- Hover over a sortable column heading, and then click the column heading to arrange the records in ascending or descending order.
- Click the **Refresh** icon in the upper-right corner to reload the page and display the latest export information.

2. Search for and select the export you want to review.
3. To view export details, click the **Expand** icon in the corresponding export batch row.

   (To hide the displayed details, click the **Collapse** icon.)

   The **Export Details** section appears below the row and displays information such as the export status, type, archive, date range, item counts, download size, folder path, encryption status, creator, and relevant dates.
4. To download items from active folders, hover over the required export row and click the **Download** icon.

   The **Download** icon appears only when you hover over the row.



   Save the downloaded file in the appropriate folder on your computer.