

# Getting started

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## 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 messages you send and receive to Arctera Unified Platform. Using Arctera Personal Archive, you can work with 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 Insight eDiscovery your administrator can assign you the reviewer role, which lets you monitor the messages of other archive accounts.

Recent updates to Arctera Personal Archive

Recent updates to Arctera Personal Archive include the following:

- Your administrator can now control whether the options to print and save messages are available in Arctera Personal Archive.
- Delegate access now supports Office 365 archive accounts in addition to Exchange on-premises archive accounts.

A list of the updates that were included with previous releases of Arctera Personal Archive is provided separately.

See [Compatibility and the latest updates](#).

For details of all the updates in each release of the Arctera Unified Platform service suite, see the [Arctera Unified Platform Release Notes](#) on the Arctera support website.

## Prerequisites for Arctera Personal Archive

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.

## Compatibility and the latest updates

For supported Microsoft Outlook versions and web browser compatibility, refer to the [Arctera Unified Platform Compatibility List](#).

For details about all release notes and the latest product documentation of the Arctera Unified Platform service suite, see the [Arctera Unified Platform Platform Documentation](#).

## 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 XMLHTTP 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 Insight Archiving Mobile Web Access if you want to access your archived messages from a mobile device.

## Accessing new Arctera Personal Archive portal

To access the new Arctera Personal Archive portal, click on the new icon available on the title bar of the old Arctera Personal Archive application, as shown in the image below.

## Logging in

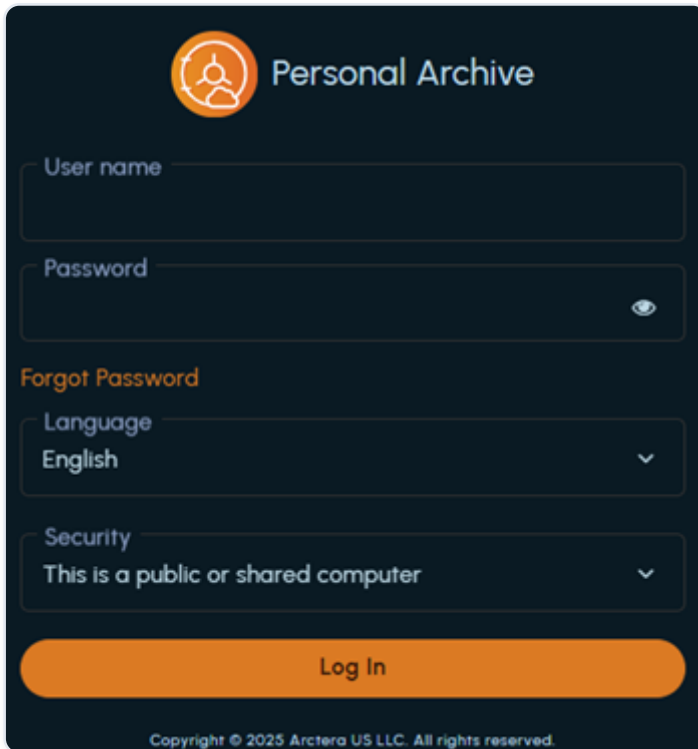
Before you can access your archived messages, you must log in to Arctera Personal Archive using your Arctera Unified Platform credentials.

To log in

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

**Note:** Contact your administrator if you do not know the Arctera Personal Archive URL or need help signing in. In addition, refer to FAQs: Arctera Insight SaaS URL Updates.

2. On the Login page, do the following:



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.
	<b>Note:</b> 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

USER NAME	ENTER YOUR ARCTERA UNIFIED PLATFORM USER NAME.
	prompts you to enter your credentials each time you access the Login page and 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 as shown in the sample image below.

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 clickContinue.**

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 orOther 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 Insight Management Console, Insight eDiscovery, Arctera Personal Archive, Insight Capture, and Insight 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 read the complete release notes document, click View Detailed 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.

## Setting application preferences

You can customize application preferences to match your language, date, number formats, page layout, and other user-specific options. These settings control how information is displayed and how the application behaves during your session.

To configure settings

1. In the top-right corner of the application header, click the **More settings** (Gear) icon.

The **Settings** tab appears.

1. Specify the following details as needed:

<b>INTERNATIONALIZATION</b>	<b>- LANGUAGE - SELECT THE DISPLAY LANGUAGE FOR THE APPLICATION USER INTERFACE.</b>
	<b>- DATE FORMAT - CHOOSE THE PREFERRED DATE FORMAT.</b>
	<b>- NUMBER FORMAT - SELECT HOW NUMBERS ARE DISPLAYED.</b>
	<b>- TIME ZONE - SET THE APPROPRIATE TIME ZONE.</b>
Page Layout	Select a layout option to define how content appears on the screen.
Change Password	Click Change password to update your login password.
	In the Current Password field, enter your existing password. In the New Password field, enter a new password that meets the requirements. In the Confirm New Password field, reenter the new password. Click Ok to save the new password, or click Cancel to cancel the operation.
Message notification options	Select when to display notifications:
	- Display warning message if user turns on search filters.

INTERNATIONALIZATION	- LANGUAGE - SELECT THE DISPLAY LANGUAGE FOR THE APPLICATION USER INTERFACE.
	- DATE FORMAT - CHOOSE THE PREFERRED DATE FORMAT.
	- NUMBER FORMAT - SELECT HOW NUMBERS ARE DISPLAYED.
	- TIME ZONE - SET THE APPROPRIATE TIME ZONE.
	- Display warning message if user logs off without saving information.
	- Display warning message if user closes new message before saving information.
Autosave options	Select the checkbox to save the work automatically. Select the time interval to autosave your work.
Display icons mode	- Minimal (only icons) - Select this option to view only icons and not its label.
	- Basic (Icons plus Labels) - Select this option to view icons and its labels.

2. Click **Save**.

**Note:** You can click **Default** to restore all your settings to their default values.

## 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.

1. 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.

1. Open the password reset email and click on the provided **Reset Password** link.

The application directs you to a **Reset Password** page.

1. 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.

## Changing your message view

By default, the message list in Arctera Personal Archive 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 tab that is located above the message list.
2. Select one of the following options:

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.

# Managing archives and archived messages

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This section includes the following topics:

- [About Folder Sync](#)
- [Folder Sync FAQ](#)
- [Viewing Synchronized Folders in Arctera Personal Archive](#)
- [Monitoring other accounts](#)
- [Viewing delegate archives](#)
- [Working with archived emails](#)
- [Viewing collaboration messages](#)

## About Folder Sync

Folder Sync is an add-on feature of Arctera Unified Platform that lets you view your existing Microsoft Outlook folder structure in Arctera Personal Archive. Once your administrator enables Folder Sync for your account, an initial synchronization event replicates your Outlook folder structure in Arctera Personal Archive. As you make changes to folders in Outlook, Folder Sync replicates these changes in Arctera Personal Archive during subsequent synchronization events. Since your administrator configures the frequency of synchronization events, it may take some time before changes you make appear in Arctera Personal Archive.

**Note:** Folder Sync is only intended for viewing your Outlook folder structure. You cannot make changes to your folder structure or move archived message between folders in Arctera Personal Archive.

## Folder Sync FAQ

The following frequently asked questions provide more information 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 frequency of synchronization events.

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

Folder Sync can synchronize up to 10000 folders per mailbox to Arctera Personal Archive.

- Why is my Active Folders tab in Arctera Personal Archive blank.

If your Active Folders tab is blank, your account may not be set up for Folder Sync. Contact your administrator for more information about setting up Folder Sync for your account.

- Why are the folders I create in Microsoft Outlook not appearing in Arctera Personal Archive?

Since your administrator configures the frequency of synchronization events, it may take some time before changes you make appear in Arctera Personal Archive. Contact your administrator for more information about the frequency of synchronization events.

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

Folder Sync does not synchronize the contacts, tasks, and 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 messages within a folder because Folder Sync is only intended 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. The only way to view the messages in a synchronized folder is to click on the folder in the Active Folders tab.

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

Since your administrator configures the frequency of synchronization events, it may take some time before changes you make appear in Arctera Personal Archive. Contact your administrator for more information about the frequency of synchronization events.

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

No, Arctera Personal Archive does not notify users each time a synchronization event occurs. However, you can see the last time that a synchronization event occurred 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. Log in to Arctera Personal Archive.
2. Select the monitored and delegate 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 Insight 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.

## Monitoring other accounts

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

To monitor other accounts

1. In the left pane of Arctera Personal Archive, select the Archives tab.
2. Select the check box for each archive whose content you want to view.
3. If you want to exclude the content of your own archive from the message list, uncheck the check box for your archive on the Archives tab.

**Note:** You cannot exclude your own archive unless the check box for at least one other archive is checked.

4. Click the **Refresh** icon.



The message list then shows the messages of the archives that are selected on the Archives tab.

## Viewing delegate archives

Arctera Personal Archive lets you view the archives for which you have the required synchronized delegate access permissions.

To view delegate archives

1. In the left pane of Arctera Personal Archive, select the Archives tab.
2. Under Delegate Archives, select the check box for each delegate archive you want to view.

**Note:** The Delegate Archives list appears only if you have delegate access to one or more archives.

3. If you want to exclude the content of your own archive from the message list, uncheck the check box for your archive on the Archives tab.

**Note:** You cannot exclude your own archive unless the check box for at least one other archive is checked.

4. Click the **Refresh** icon.



The message list then shows the messages of the archives that are selected on the Archives tab.

## Working with archived emails

This section describes various task that you can perform with the archived emails.

### Composing new emails

You can compose and send new emails from Arctera Personal Archive, unless your administrator makes the Send action unavailable.

**Note:** If your recipient does not receive your email, ask them to check their junk mail folder.

To compose a new email

1. In the toolbar at the top of the browser window, click **New**.

**Note:** This option is hidden if your administrator makes the Send action unavailable.

2. In the new email tab, enter the email addresses of the email recipients in the To, Cc, or Bcc fields.
3. If you want to attach a file to your email, click **Attach a file** and select the file.

**Note:** Attachments of up to 4 MB can be included in an email.

4. Compose your email.
5. Click **Send**.

### Viewing archived emails

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

To view archived emails

- Do any of the following:
  - If your Arctera Personal Archive page layout has two horizontal panes, select a email in the email list to view the email details in the lower pane.

You can then click **Previous** or **Next** on the toolbar to view the adjacent emails.



You can change the Arctera Personal Archive page layout from the **Settings** menu.

See [Setting application preferences](#).

- To display a email in a new tab, double-click the email in the email list, or right-click the email and click **Open**.

## Replying to archived emails

You can reply to archived emails from Arctera Personal Archive, unless your administrator makes the Reply action unavailable.

To reply to an archived email

1. In the email list, select an archived email.
2. Do one of the following:
  - In the email toolbar, click **Reply** or **Reply All**.
  - Right-click the email then click **Reply** or **Reply All**.

**Note:** These options are hidden if your administrator makes the Reply action unavailable.

3. In the new email tab, enter the email addresses of the email recipients in the To, Cc, or Bcc fields.
4. If you want to attach a file to your email, click **Attach a file** and select the file.

**Note:** Attachments of up to 4 MB can be included in an email.

5. When you have entered your reply, click **Send**.

## Forwarding archived emails

You can forward archived emails from Arctera Personal Archive, unless your administrator makes the Forward action unavailable.

To forward an archived email

1. In the email list, select an archived email.
2. Do one of the following:
  - In the email toolbar, click **Forward**.
  - Right-click the email then click **Forward**.

**Note:** These options are hidden if your administrator makes the Forward action unavailable.

3. In the new email tab, enter the email addresses of the email recipients in the To, Cc, or Bcc fields.
4. If you want to attach a file to your email, click **Attach a file** and select the file.

**Note:** Attachments of up to 4 MB can be included in an email.

5. Click **Send**.

## Restoring archived emails

While working with your archived emails, you may find one you need that is no longer in your inbox. Using Arctera Personal Archive, you can restore the archived email and send an exact copy of it back to your inbox. The restored email appears at the top of the email list in your inbox with the date and time you restored it. You can see the original timestamp of the email by opening it in your inbox.

Outlook on the web displays the restored timestamp by default. When replying to this email, the original timestamp is displayed properly in the Sent field.

To restore a single email

1. In the email list, select an archived email.
2. Do one of the following:

- In the email toolbar, click **Restore this email**.
- Right-click the email then click **Restore this email**.

**Note:** You can only restore one email at a time from the right-click menu. Even if you select multiple emails and click **Restore this email** in the right-click menu, Arctera Personal Archive only restores the email you right-clicked.

To restore multiple emails

1. In the email list, select the archived emails that you want to restore.
2. In the toolbar at the top of the browser window toolbar, click **Restore**.

## Applying tags

You can apply tags to one or more archived messages in Arctera Personal Archive directly from the message list. You can either apply existing tags or create new personal tags.

To apply tags to a single message

1. In the message list, select an archived message.
2. In the toolbar at the top of the browser window, click **Tags then click Tag Selected Emails**.
3. In the Add Tag window, do one of the following:
  - Select an existing personal, legal hold, or retention tag to apply.
  - Enter a tag name in the New Tag field to create a new tag.

**Note:** You can enter up to 50 characters for the tag name.

4. If you created a new tag, you can enter a comment in the Comment field.
5. If you created a new tag, you can check Legal Hold Tag to make the new tag a legal hold tag.

**Note:** You can only create legal hold tags if you are a reviewer or administrator with the required permissions.

6. Click **Ok**.

To apply tags to multiple messages

1. Do one of the following:

- In the message list, select the archived messages you want to tag, click **Tag** then **clickTag selected Emails**.
- In the toolbar at the top of the browser window, click **Tag** then **clickTag current page** to tag the current page of messages.
- In the toolbar at the top of the browser window, click **Tag** then **clickTag all emails** to tag all your messages.

2. In the Add Tag window, do one of the following:

- Select an existing personal, legal hold, or retention tag to apply.
- Enter a tag name in the New Tag field to create a new tag.

**Note:** You can enter up to 50 characters for the tag name.

3. If you created a new tag, you can enter a comment in the Comment field.

4. If you created a new tag, you can check Legal Hold Tag to make the new tag a legal hold tag.

**Note:** You can only create legal hold tags if you are a reviewer or administrator with the required permissions.

5. Click **Ok**.

## Removing tags

You can remove tags from one or more archived messages in Arctera Personal Archive.

To remove tags from a single message

1. In the message list, select an archived message with a tag applied.

**Note:** A tag icon in the Tag column of the message list indicates a message has a tag applied. The number next to the tag icon denotes the number of tags applied.

2. Right-click the message and click **Remove Tag**.

3. In the Remove Tag window, select the tags you want to remove.

**Note:** The Remove Tag window does not display if the message only has one tag applied.

4. Click **Remove**.

To remove tags from multiple messages

1. In the toolbar at the top of the browser window, click **Tag** and select the tag you want to remove.
2. In the new tab that lists all the messages with the selected tag applied, select the messages you want to remove the tag from.
3. In the toolbar at the top of the browser window, click **Tag then click Remove tag from selected message**.
4. In the Remove this Tag from the selected emails window, click **Yes**.

## Saving archived emails to your computer

You can save a copy of an archived email to your computer, unless your administrator makes the Save action unavailable.

To save an archived email

1. In the email list, select an archived email.
2. Do one of the following:
  - In the email toolbar, click **Save this email**.
  - Right-click the email then click **Save this email**.

**Note:** These options are hidden if your administrator makes the Save action unavailable.

**Note:** You can only save one email at a time. Even if you select multiple emails and click Save this email in the right-click menu, Arctera Personal Archive only saves the email you right-clicked.

3. In the File Download window, click **Save** to save the email to your Downloads folder.

**Note:** You can click **Open** in the File Download window if you want to open the email before you save it to your computer.

## Downloading email attachments

While working with archived emails, you may find an attachment you want to download. Using Arctera Personal Archive, you can download email attachments to your computer.

To download a email attachment

1. In the email list, select an archived email with an attachment.

**Note:** A Paperclip icon next to a email in the email list denotes a email with an attachment.

2. In the email window, click the Paperclip icon next to the email subject line to show attachments.

**Note:** Attachments are shown under the email recipient list.

3. Click on an attachment to download it to your computer.
4. In the File Download window, click **Save** to save the attachment to your Downloads folder.

**Note:** You can click **Open** in the File Download window if you want to open the attachment before you save it to your computer.

## Printing archived emails

You can print a copy of an archived email from Arctera Personal Archive, unless your administrator makes the Print action unavailable.

To print an archived email

1. In the email list, select an archived email.
2. Do one of the following:
  - In the email toolbar, click **Print this email**.
  - Right-click the email then click **Print this email**.

**Note:** These options are hidden if your administrator makes the Print action unavailable.

**Note:** You can only print one email at a time. Even if you select multiple email and click Print this email in the right-click menu, Arctera Personal Archive only prints the email you right-clicked.

## Sending archived email to InsightBook

You can send individual emails to the InsightBooks as needed.

To send archived email to InsightBook

1. In the email list, select an archived email.
2. Right-click the email and click **Send to InsightBook**.

The list of available InsightBooks appears.

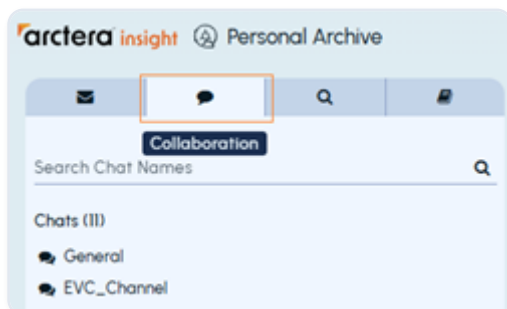
1. Select the InsightBook to which you want to send the selected email.

The notification is displayed that the email is sent to InsightBook.

## Viewing collaboration messages

Users can view collaboration messages in PA only when the following conditions are met in Arctera Insight 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.

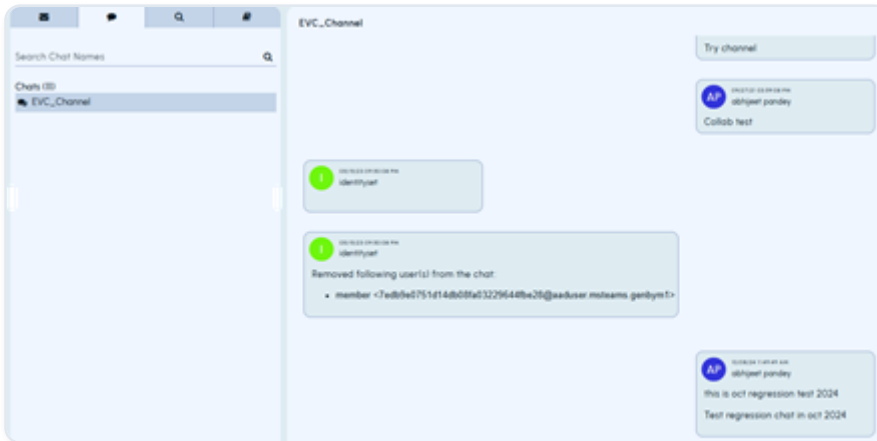


For any assistance about this, contact your system administrator.

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.



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

# Managing InsightBooks

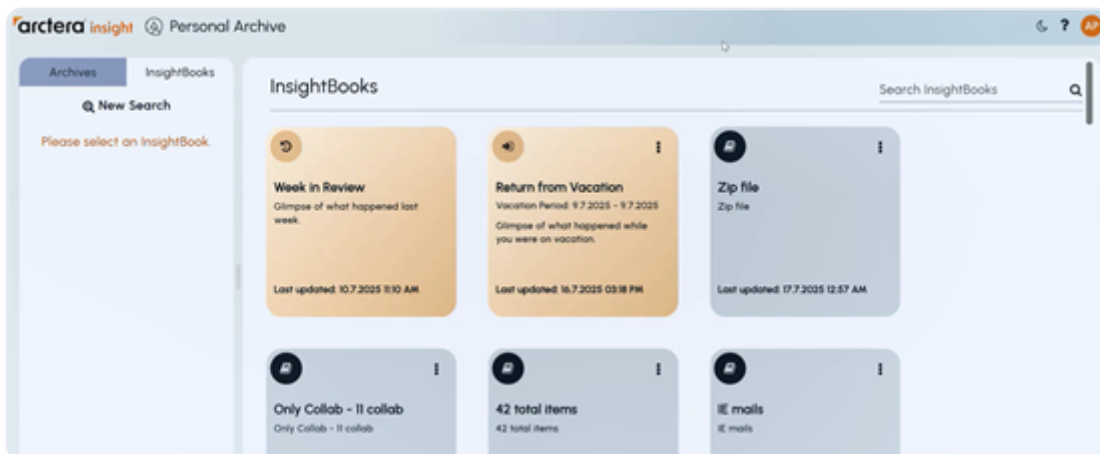
This section includes the following topics:

- [About InsightBooks](#)
- [Understanding InsightBooks dashboard](#)
- [Setting a vacation period](#)
- [Creating InsightBooks](#)
- [Creating Notes in InsightBooks](#)
- [Working with InsightBooks](#)

## About InsightBooks

### Overview

InsightBook in Personal Archive 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. InsightBooks streamline 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

InsightBooks feature is available if:

- Application level setting: The Arctera Insight 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 Insight Management Console help.

## Understanding InsightBooks dashboard

### Accessing the dashboard

To access the InsightBooks dashboard, open the Personal Archive application and navigate to the InsightBooks tab in the left pane. If you are accessing it for the first time, the following InsightBooks are displayed by default:



- Week in Review:

This Week in Review InsightBook automatically gathers all emails and collaboration messages received during the past week, from Monday through Sunday. It helps users quickly review recent communications and identify key discussions or updates without manually filtering content.

- Return from Vacation:

The Return from Vacation InsightBook allows users to set a custom vacation period. When the user returns, the InsightBook displays all emails and collaboration messages received during that timeframe, making it easier to catch up on missed communications. See [Setting a vacation period](#).

### Searching InsightBooks

You can search for a specific InsightBook using the Search field in the top-right corner of the dashboard. Enter a keyword, such as the InsightBook name or a related topic, and the list filters automatically to display matching InsightBooks. This helps users quickly locate a particular collection without scrolling through the entire list.

## Setting a vacation period

You can configure the vacation period for the Return from Vacation InsightBook to review all communications received while you were away.

To set vacation period

1. In the InsightBooks dashboard, select *Return from Vacation* InsightBook.
2. Click the **More options icon and select Set Vacation Time**.
3. Choose the start and end dates of your vacation period.
4. Click **Confirm**.

The vacation period is reflected on the book. The InsightBook automatically compiles emails and collaboration messages received during the selected period, ensuring a quick review upon your return.

## 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. On the **InsightBooks tab**, click **New Search**.
2. Create a query by using *Advanced Search* or *Query Search*, and click **Search**.

Based on the search criteria, the application displays the resulting emails and collaboration messages.

1. Click **Create InsightBook**.

5,197 search results found. Create InsightBook

Emails (5,191) Collaboration (6)

From	To	Subject	Date	Size
Adele Vance	Archana Pawar	Keyword Extraction - Load ...	16.7.2025 11:20 AM	4 KB
Adele Vance	Archana Pawar	Keyword Extraction - Load ...	16.7.2025 11:20 AM	4 KB
Adele Vance	Archana Pawar	Keyword Extraction - Load ...	16.7.2025 11:20 AM	4 KB
Adele Vance	Archana Pawar	Keyword Extraction - Load ...	16.7.2025 11:20 AM	4 KB
Adele Vance	Archana Pawar	Keyword Extraction - Load ...	16.7.2025 11:20 AM	4 KB
Adele Vance	Archana Pawar	Keyword Extraction - Load ...	16.7.2025 11:20 AM	4 KB
Adele Vance	Archana Pawar	Keyword Extraction - Load ...	16.7.2025 11:20 AM	4 KB

Rows per page: 30 1 - 30 of 5,191 Page: 1 of 174

The Create InsightBook dialog box appears.

## Create InsightBook ✕

**Name**

---

**Description**

---

**Configure InsightAI**

**Save**

1. Enter a unique name of the InsightBook and a description.
2. Click **Configure InsightAI** to configure InsightAI by selecting the content sources you want to include in your search results.

The *InsightAI Configuration* window appears. Select the required options and click **Save**.

## InsightAI Configuration ✕

You can choose the content sources you'd like to include when configuring InsightAI for your search results. Please select from the options below:-

**Emails:**  Include Emails  Include Attachments

**Collab:**  Include Chats

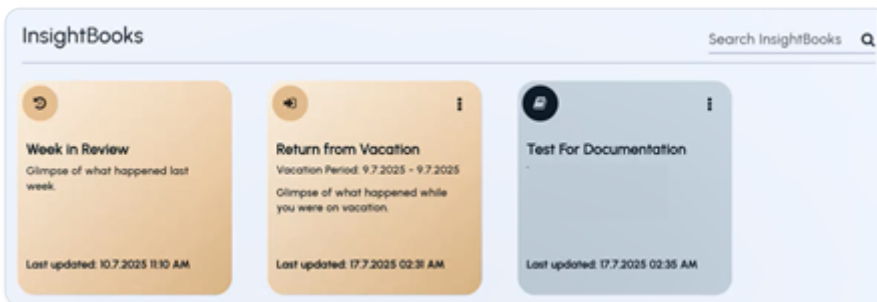
**Note:** Your AI Unit consumption may vary depending on the number of content sources you choose.

**Cancel** **Save**

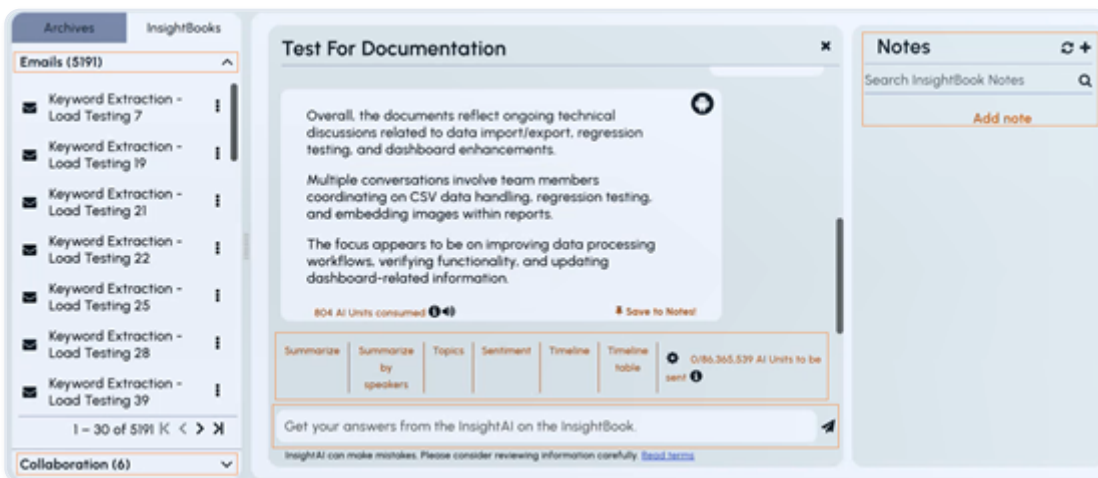
- **Emails** \- This option is selected by default. Select it to include emails in the search results, or clear it to exclude emails.
- **Include Attachments** \- This option is clear by default. Select it to include email attachments in the search results, or leave it clear to exclude attachments.
- **Collab** \- This option is selected by default. Select it to include collaboration messages in the search results, or clear it to exclude them.

1. Click **Save**.

The new InsightBook appears on the dashboard as shown in the sample image below.



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



- In the left panel, the list of emails and collaboration items included in this InsightBook are displayed. Items are categorized as Emails and Collaboration and display counts for quick reference.

Upon selecting an email or a collaboration message, click the More options icon. Click Preview to view the item in detail. Click Remove to remove that item from the list.

- In the middle panel, the default prompts such as Summarize, Summarize by speakers, Topics, Sentiment, Timeline, and Timeline Table are displayed. In the input box at the bottom, you can type prompts (queries) for InsightAI analysis. You can directly save the AI generated response as a note.

The middle pane also displays the AI units being consumed.

- In the right panel, you can add, view, or search for notes related to the InsightBook. AI-generated responses can also be saved as notes for later reference. You can set the notes as private.

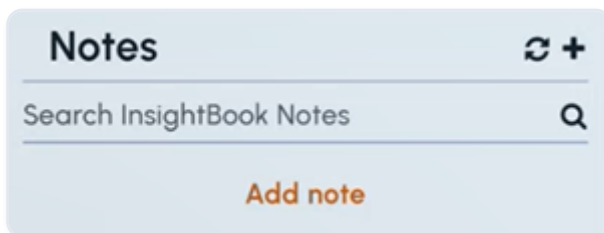
## Creating Notes in InsightBooks

You can create notes in an InsightBook in two ways:

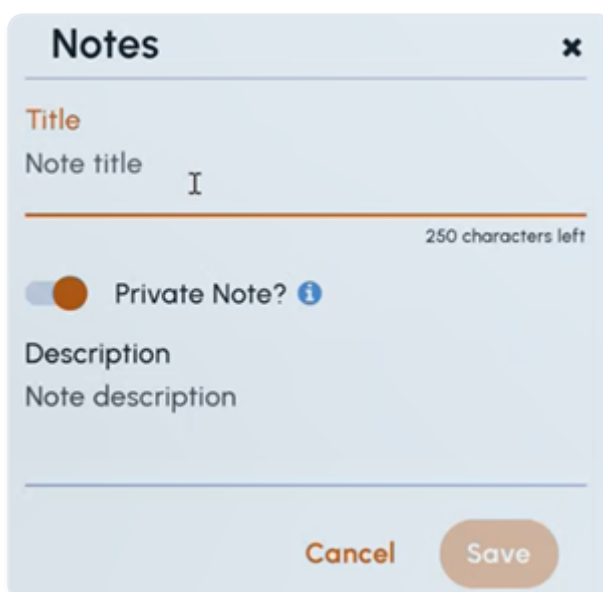
- By manually adding a note in the right panel.
- By saving AI-generated prompts and responses as notes.

To create a note manually

1. Open the InsightBook.
2. In the **Notes** panel, do any of the following:



- If you are adding a note for the first time, click **Add note**.
- Click the **Plus** icon.



- Enter a unique note title up to 250 characters.
- Enter a description for this note.

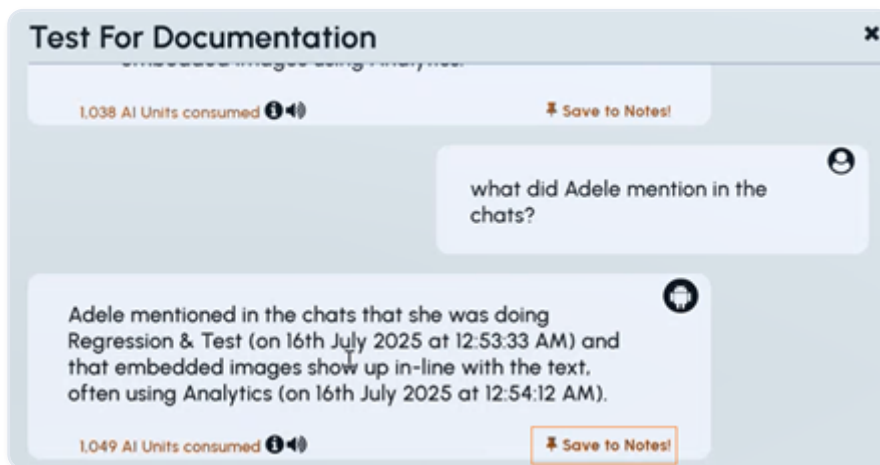
- Toggle the **Private Note?** switch to the right to make the note private.

**Note** : In a shared InsightBook, co-workers can view all notes added by the author unless they are marked as private. When notes are shared with an InsightBook, only the author can delete them or change their privacy setting. Notes in default folders (Week in Review and Return from Vacation) cannot be set as private.

1. Click **Save**.

To create a note from AI generated responses

1. Open the InsightBook.
2. In the middle panel, enter a prompt to query the information you need from InsightAI.
3. After receiving a response, click **Save to Notes!** in the response panel.



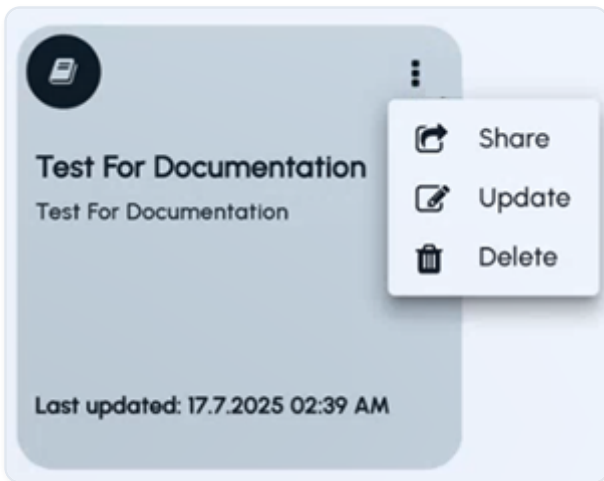
4. If required, Toggle the **Private Note?** switch to the right to make the note private.

**Note** : In a shared InsightBook, co-workers can view all notes added by the author unless they are marked as private. When notes are shared with an InsightBook, only the author can delete them or change their privacy setting. Notes in default folders (Week in Review and Return from Vacation) cannot be set as private.

1. Click **Save**.

## Working with InsightBooks

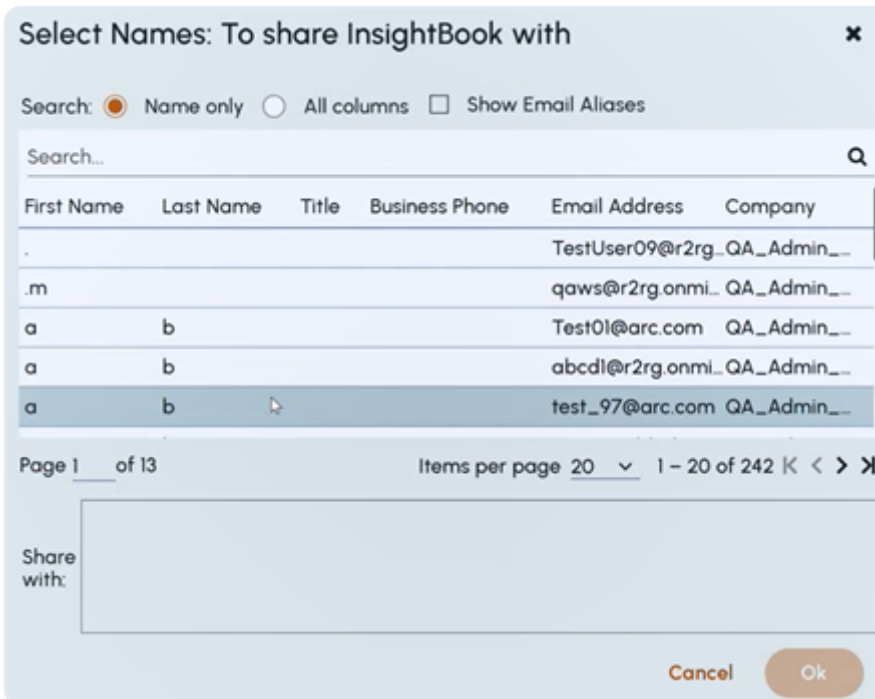
You can perform various actions on an InsightBook using the More options icon at the top-right corner of the book. These actions allow you to update content, share the InsightBook with others, or delete it when required as shown in the sample image below.



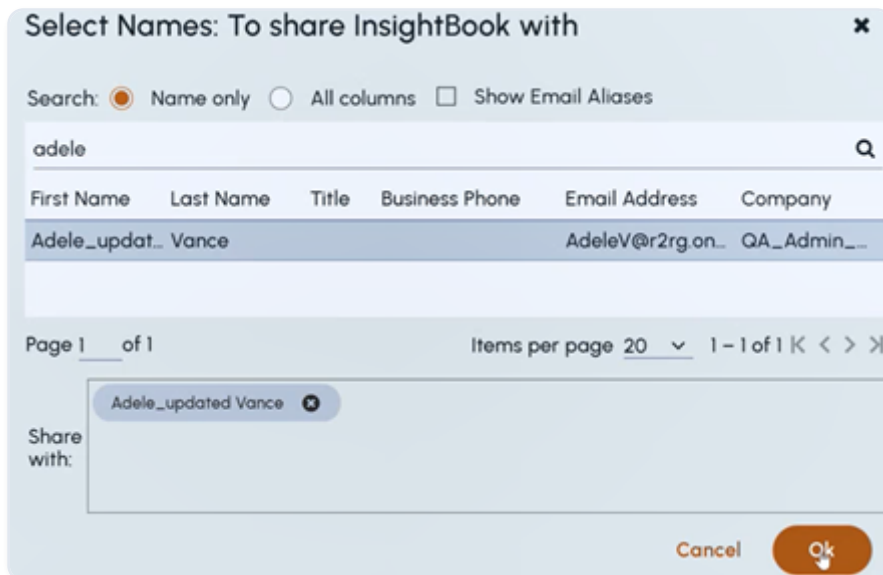
To share InsightBook

1. Click **Share** to select user accounts.

The **Select Names** dialog box appears as shown in the sample image below.



1. Select one or more names to share the InsightBook with, and click them to add to the sharing list. Then, click **OK**.



The application prompts you to confirm that you want to perform the operation. Click **Yes to complete the operation** or **clickNo** to cancel it.

The InsightBook gets shared with the selected users.

To update InsightBook

**Note:** Only the author of an InsightBook can update, while shared users cannot perform these actions.

1. Click **Update** to modify the InsightBook.
2. If needed, edit the InsightBook name, description, and InsightAI settings.
3. Click **Save**.

To delete InsightBook

**Note:** Only the author of an InsightBook can delete it, while shared users cannot perform these actions.

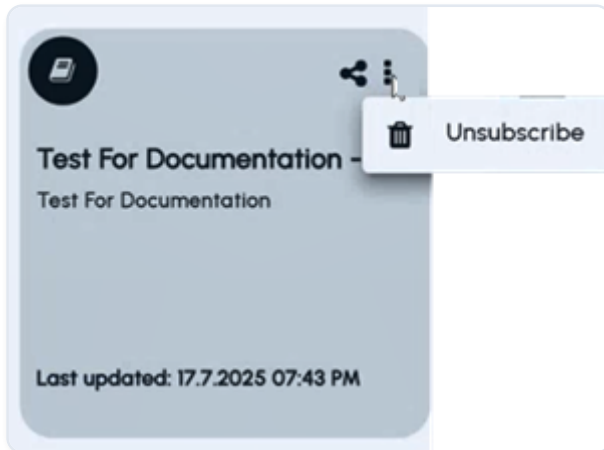
- Click **Delete**.

The application prompts you to confirm that you want to perform the operation. Click **Yes to complete the operation** or **clickNo** to cancel it.

To unsubscribe InsightBook

**Note:** 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.

- Click **Unsubscribe**.



The application prompts you to confirm that you want to perform the operation. Click **Yes to complete the operation or clickNo** to cancel it.

# Managing searches

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This section includes the following topics:

- [About Arctera Personal Archive Search](#)
- [Using Quick Search](#)
- [Using Advanced Search](#)
- [Using folder search](#)
- [Creating a new search](#)
- [About Hit Highlighting](#)
- [Search syntax](#)
- [About stop words and special characters in searches](#)
- [Boolean operator searches](#)
- [Wildcard searches](#)
- [Proximity searches](#)
- [Double-byte character set searches](#)
- [About enhanced searches in Japanese](#)
- [Using Search Filters](#)
- [Creating Saved Searches](#)
- [Updating Saved Searches](#)
- [Deleting Saved Searches](#)
- [Searchable attachment types](#)
- [Arctera Personal Archive Search FAQs](#)

## About Arctera Personal Archive Search

Arctera Personal Archive provides a range of search options and features:

- Quick Search provides a simple search for message content.

See [Using Quick Search](#).

- Advanced Search provides multiple search options to let you target a search on specific message components such as sender, recipient, or subject. You can also search on message attributes such as the sent date or attachment type.

See [Using Advanced Search](#).

- Both Quick Search and Advanced Search support phrase searches, Boolean searches, wildcard searches, and proximity searches.

See [Search syntax](#).

- Arctera Personal Archive drops some common words from searches. These words are known as stop words. Arctera Personal Archive also omits many special characters from searches.

See [About stop words and special characters in searches](#).

- You can use search result filters to narrow down the results.

See [Using Search Filters](#).

- You can save your favorite searches, to let you re-run them easily.

See [Creating Saved Searches](#).

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

See [Double-byte character set searches](#).

- You can perform enhanced searches in Japanese, if your company subscribes to this add-on feature.

See [About enhanced searches in Japanese](#).

## Using Quick Search

Quick Search provides a quick way to create a search for archived messages using criteria such as a user name, an email address, or a word or phrase.

Quick Search supports phrase searches, Boolean searches, wildcard searches, and proximity searches. Search terms are not case-sensitive.

To use Quick Search

1. In the toolbar at the top of the browser window, in the Content field, enter a user name, email address, or search term.
2. Click the **Magnifying Glass** icon to perform your search.

## Using Advanced Search

Advanced Search provides additional search options that let you focus a search within specific message components such as sender, recipient, or subject. You can also search on message attributes such as the sent date, mail direction, or attachment type.

Advanced Search supports phrase searches, Boolean searches, wildcard searches, and proximity searches. Search terms are not case-sensitive.

To use Advanced Search

1. In the toolbar at the top of the browser window, click the **Expansion** icon to show the Advanced Search options.
2. Specify your search criteria in the following fields:

CONTENT	ENTER A USER NAME, EMAIL ADDRESS, OR SEARCH TERM.
Subject	Enter the subject of the message, or part of the subject.
From	Enter the name or the email address of the message sender.
	<b>Note:</b> You can clickFromto select names or email addresses from the global address list.
To	Enter the name or the email address of the message recipient.
	This option produces search results from the To , CC , and BCC fields.
	<b>Note:</b> You can clickToto select names or email addresses from the global address list.

CONTENT	ENTER A USER NAME, EMAIL ADDRESS, OR SEARCH TERM.
Mail Direction	Select an option to search for all messages, only incoming messages, or only outgoing messages.
Has Attachment	Select to find only those messages that have attachments.
	<b>Note:</b> Password protected and encrypted attachments are not included in searches.
Attachment Type	If you selected the Has Attachment check box, specify an attachment type. Arctera Personal Archive search supports a wide range of attachment types.
	See <a href="#">Searchable attachment types</a> .
Sent Date	Select a predefined date range option or select Custom Date to enter a specific date range.

3. Click the **Magnifying Glass** icon to perform your search.

## Using folder search

This feature improves search efficiency by allowing users to search within specific folders and subfolders instead of across the entire archive. This is especially useful when similar content exists in multiple folders and the user wants to narrow results to a targeted location.

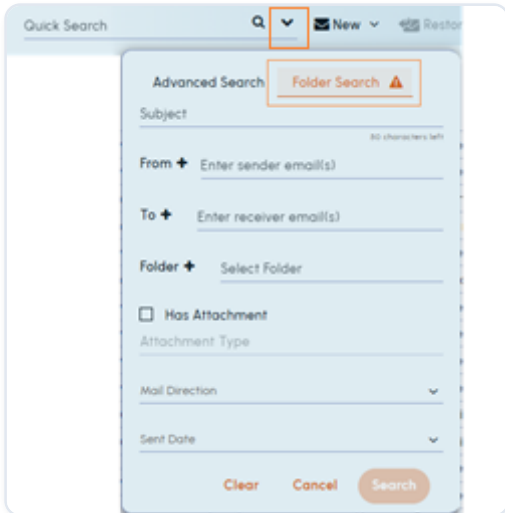
Users can view this feature in Arctera Personal Archive only when the system administrator enables the *Enable Folder Search in Personal Archive* service in Arctera Insight Management Console. This feature is disabled by default. Once enabled, users can perform folder-specific searches.

Users can save Folder Search queries in the same way as other saved searches.

To use folder search

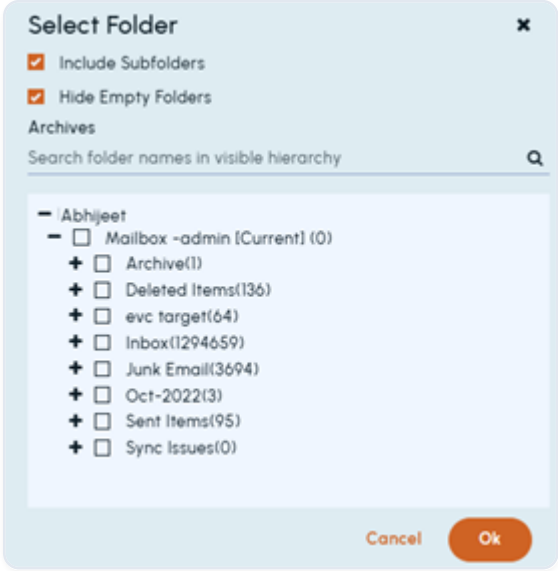
1. In the left pane, select the **Archives** tab.

2. On the toolbar, click the *Expansion* icon to show the **Folder Search** options. as shown in the sample image below.



3. Click the **Folder Search** tab and do the following:

SUBJECT	(OPTIONAL) ENTER KEYWORDS OR THE FULL SUBJECT LINE (UP TO 50 CHARACTERS) TO SEARCH FOR FOLDERS THAT CONTAIN EMAILS WITH MATCHING SUBJECTS.
From +	Enter the email address of the email sender (up to 50 characters) to search for folders that contain emails sent by that sender. Alternatively, you can follow the steps mentioned below:
	1. Click the Plus icon next to From . The Select Names: Global Address List dialog opens.
	2. Choose a search option (Name only, All columns, or Show Email Aliases) and enter a keyword in the Search box.
	3. Navigate through the results, then select one or more entries.
	4. Verify that the selected entries are displayed in the From field, and click Ok .

SUBJECT	(OPTIONAL) ENTER KEYWORDS OR THE FULL SUBJECT LINE (UP TO 50 CHARACTERS) TO SEARCH FOR FOLDERS THAT CONTAIN EMAILS WITH MATCHING SUBJECTS.
To +	Enter the email address of the email recipient (up to 50 characters) to search for folders that contain emails sent by that sender. Alternatively, you can follow the steps mentioned below:
	1. Click the Plus icon next to To . The Select Names: Global Address List dialog opens.
	2. Choose a search option (Name only, All columns, or Show Email Aliases) and enter a keyword in the Search box.
	3. Navigate through the results, then select one or more entries.
	4. Verify that the selected entries are displayed in the From field, and click Ok .
Folder +	 <p>1. Click the Plus icon next to Folder . The Select Folder dialog opens.</p>
	2. Select the Include Subfolders checkbox to include subfolders in the search.

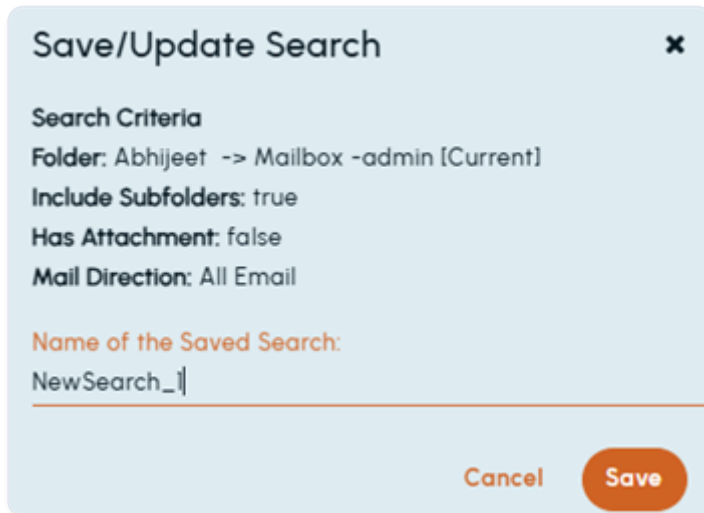
SUBJECT	(OPTIONAL) ENTER KEYWORDS OR THE FULL SUBJECT LINE (UP TO 50 CHARACTERS) TO SEARCH FOR FOLDERS THAT CONTAIN EMAILS WITH MATCHING SUBJECTS.
	3. Select the Hide Empty Folders checkbox to exclude folders that do not contain emails.
	4. Verify that the selected entries are displayed in the Folder field.
Has Attachment	Select this checkbox to search for folders that contain emails with attachments only.
Attachment Type	Specify the attachment type. This field is editable only when you select the Has Attachment checkbox.
Mail Direction	Select mail direction (All emails, Inbound or Outbound) to search for folders with emails matching that direction.
Sent Date	Select or customize the duration to search for folders that contain emails within that date range.

**Note:** Click Cancel to exit the dialog box, or click Clear to reset the fields.

- Click **Search**. The **Search** tab appears. The *Folder Name* column shows the folder name for each email.

From	To	Subject	Folder	Date
sender@arctera.io	akash.dhus@arctera.io.yas	Message Reconciliation Deta	Inbox	09/29/25 06:31 PM
sender@arctera.io	sasc@gmail.com.yash.rath	Message Reconciliation Deta	Inbox	09/29/25 06:31 PM
sender@arctera.io	sasc@gmail.com.yash.rath	Message Reconciliation Deta	Inbox	09/29/25 06:30 PM
sender@arctera.io	akash.dhus@arctera.io.yas	Message Reconciliation Deta	Inbox	09/29/25 06:30 PM
sender@arctera.io	test.test1@evctestc...	Office 365 Connection failure	Inbox	09/29/25 06:20 PM
sender@arctera.io	test.test1@evctestc...	Office 365 Connection failure	Inbox	09/29/25 05:21 PM
sender@arctera.io	Abhijeet Pandey	Export Summary for Batch: '1	Inbox	09/29/25 03:24 PM
sender@arctera.io	Abhijeet Pandey	Export Summary for Batch: '1	Inbox	09/29/25 03:17 PM
sender@arctera.io	Abhijeet Pandey:abhijeet.p	Policy QAC01-Alert has 32 ne	Inbox	09/29/25 01:00 PM
sender@arctera.io	admin827@qam1company	Enterprise Vault.cloud SCIM	Inbox	09/29/25 12:31 PM
sender@arctera.io	admin827@qam1company	Enterprise Vault.cloud SCIM	Inbox	09/29/25 12:30 PM

5. To save this result, on the toolbar, click **Searches>Save/Update Search**.
6. In the **Save/Update Search** dialog box, enter a unique name for this search.



**Save/Update Search** ✕

**Search Criteria**  
**Folder:** Abhijeet -> Mailbox -admin [Current]  
**Include Subfolders:** true  
**Has Attachment:** false  
**Mail Direction:** All Email

**Name of the Saved Search:**  
NewSearch\_1

**Cancel** **Save**

7. Click **Save**.

## Creating a new search

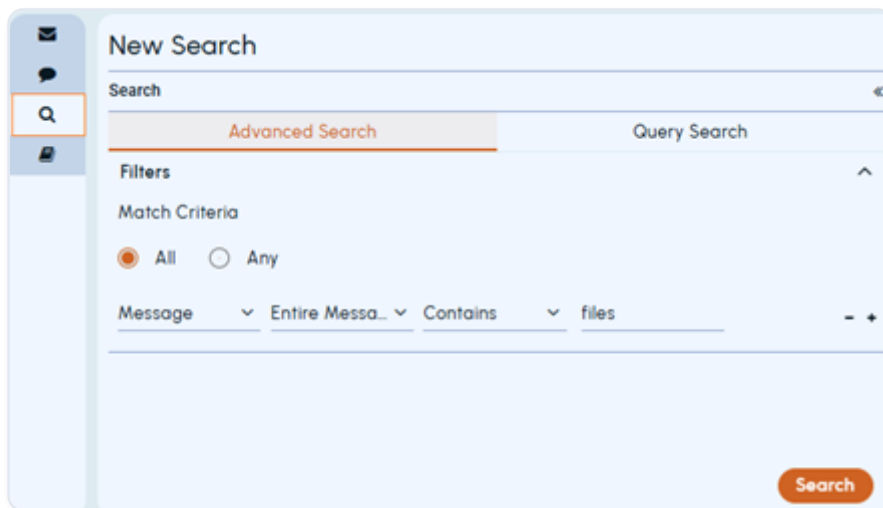
The Advanced Search feature provides a unified search experience across multiple data sources, helping you quickly locate relevant information in your personal archive. It delivers a consolidated, intuitive, and flexible search interface that enables faster retrieval of information across communication and content platforms.

After the results load, you can preview emails and collaboration items.

Note: If the InsightBook feature is enabled, you can also create a new InsightBook directly from this tab. See [About InsightBooks](#).

To create a new search

1. Select the **Advanced Search** tab.



2. To perform advanced search, specify the following inputs in the **Advanced Search** tab.

FILTERS	EXPAND FILTERS AND SET THE FILTER OPERATOR VALUES. THE OPERATORS ARE EXPLAINED IN A TABLE BELOW.
	- SELECT ALL TO MATCH ALL CONDITIONS YOU HAVE PROVIDED.
	- SELECT ANY TO MATCH ANY OF THE CONDITIONS YOU HAVE PROVIDED.
	- CLICK + TO ADD NEW SEARCH CLAUSES, AND COMPLETE A NEW ROW FOR EACH CLAUSE.
	- CLICK - TO REMOVE SEARCH CLAUSES THAT ARE NOT REQUIRED.
	- SEARCHES ARE NOT CASE-SENSITIVE. THE SEARCH SUPPORTS PHRASE SEARCH, BOOLEAN OPERATORS, PROXIMITY SEARCH, AND WILDCARD SEARCH. SEE <a href="#">SEARCH SYNTAX</a> .

The **Filter** operators are listed below:

MESSAGE	ENTIRE MESSAGE	CONTAINS / DOESN'T CONTAIN
Subject + Body	Contains / Doesn't Contain	-

MESSAGE	ENTIRE MESSAGE	CONTAINS / DOESN'T CONTAIN
Subject	Contains / Doesn't Contain	-
Body	Contains / Doesn't Contain	-
Inbound Message (AND)	Yes / No	-
Outbound Message (AND)	Yes / No	-
Is Hidden	Yes / No	-
IP Header	Contains / Doesn't Contain	-
Date Sent/Modified(AND)	Is Equal To	Select a date
Date Sent/Modified(AND)	Before	Select a date
Date Sent/Modified(AND)	After	Select a date
Date Sent/Modified(AND)	Within Range	Select a date range
Participants	All Senders and Recipients	Contains / Doesn't Contain
Participants	Senders Only	Contains / Doesn't Contain
Participants	Recipients Only	Contains / Doesn't Contain
Participants	To/Cc	Contains / Doesn't Contain
Participants	To	Contains / Doesn't Contain
Participants	Bcc	Contains / Doesn't Contain
Attachment	Has Attachment	Yes / No
Attachment	File/Attachment Name	Contains / Doesn't Contain
Attachment	File Attachment Type	Contains / Doesn't Contain
		See <a href="#">Searchable attachment types</a> .

MESSAGE	ENTIRE MESSAGE	CONTAINS / DOESN'T CONTAIN
Source Type	Is : Filters results that match the selected source type(s)	Select one or more sources as needed.
	Is Not : Excludes results that match the selected source type(s).	

- To perform query search, specify the following inputs in the **Query Search** tab.

**Note:** Use the scroll bar to view the lengthy queries.

## Guidelines for specifying queries

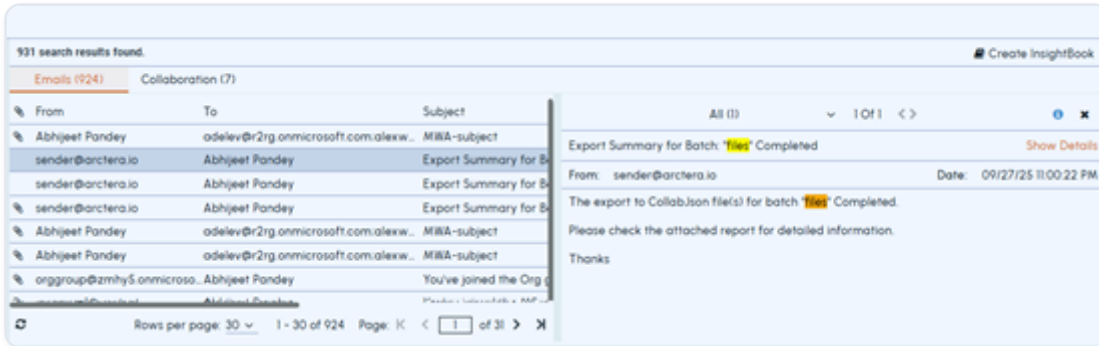
The application supports query searches only if the following necessary conditions are followed. Else, the application displays corresponding errors.

CONDITIONS	EXAMPLES
-	The search criteria must be used after the operator and before the query text.
-	The AND/OR/NOT operators must be written in capital letters.
-	The AND/OR logical operator is missing.
-	The extra space(s) between operators is not allowed.
-	The space after bracket is not allowed.
-	The space before colon is not allowed.

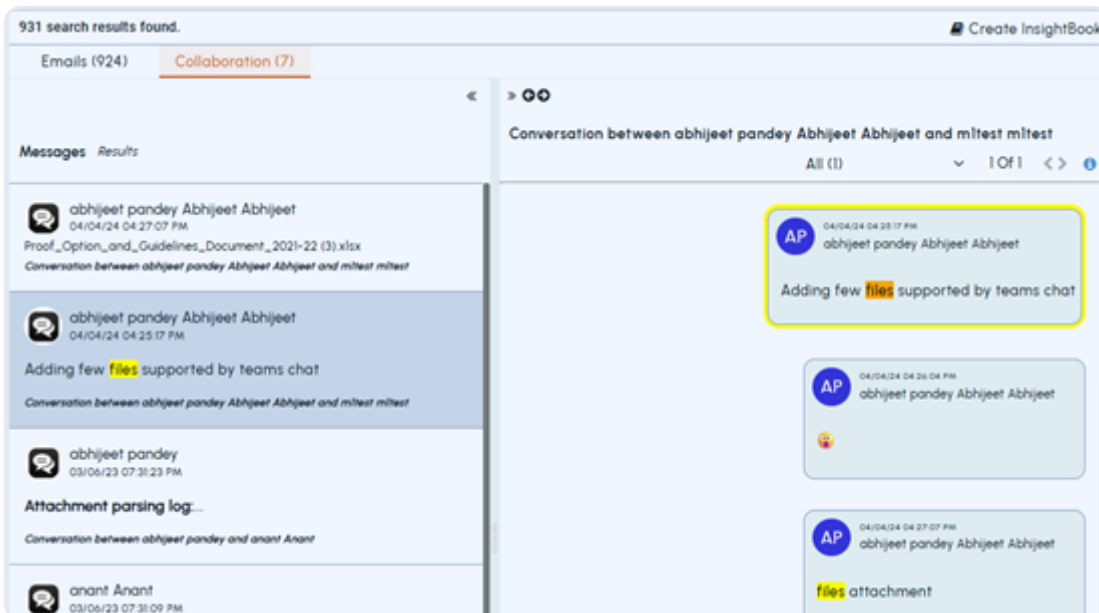
Operator-specific conditions Spaces-specific conditions

- Click **Search**.

- To review emails, access the **Email** tab and click the item you want to review. It supports hit highlighting functionality. See [About Hit Highlighting](#).



- To review collaboration messages, access the **Collaboration** tab and click the item you want to review. It supports hit highlighting functionality. See [About Hit Highlighting](#).



- (Optional) If you want to create a new InsightBook for this search result, click **Create InsightBook**.

The Create InsightBook pop-up appears as shown below.

## Create InsightBook

✕

**Name**

**Description**

**Configure InsightAI**

Save

Type a unique name and provide description of the Insightbook. Click **Save**. For more information, See [Creating InsightBooks](#).

**Note:** The\*\* InsightAI\*\* icon is visible only if this service is enabled for your account. Acting as your built-in AI assistant based on Open AI GPT-4.1 Nano model, it delivers faster, smarter, and more reliable answers from both new and saved searches by generating context from emails, collaboration messages, and files. You can use the predefined prompts or enter your own prompt (query) to generate context.

## About Hit Highlighting

Hit highlighting visually marks important terms within the item preview pane to quickly identify relevant content. These terms include the terms matched by your search criteria as well as terms in any associated tags.

Highlighting applies to the subject line, message body, attachment names, and the text or HTML preview of attachments. Search terms are highlighted in *orange*, while tags are highlighted in *green*. You can hover over a highlighted term to identify whether it originated from a query or a tag.

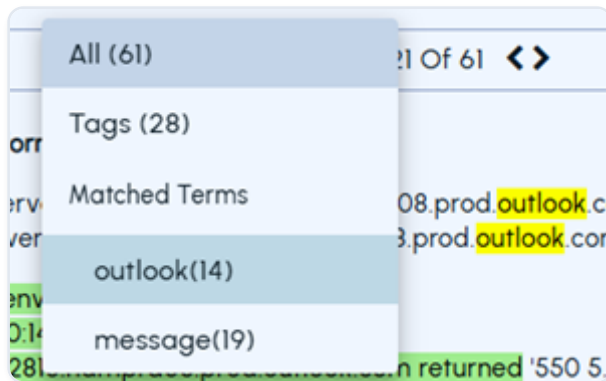
To help you review content efficiently, the preview pane includes a drop-down list showing all matched terms along with their occurrence counts. You can select *All* to view every highlighted term or choose a specific term to focus only on its instances. This targeted highlighting enables faster review of search results, especially when navigating through large message bodies or attachments.

To understand hit highlighting precisely, refer to the following scenario.

1. Create a new search or open an existing one by performing one of the following actions:
2. From the items grid, click the item you want to review. The selected item opens in the preview pane on the right.
3. In the preview pane, click the drop-down arrow to view a list of matched terms and the number of occurrences for each term.
  - Use the previous and next arrows to navigate between term hits in the message body.

**Note:** Though highlighting applies to the subject line, message body, attachment name, and the text or HTML preview of attachments, navigation is only available within the message body content.

- Select *All* to view all highlighted terms, or select a specific term to highlight only its occurrences.



### Capabilities

- Supports stop words and special characters
- Handles multi-byte characters
- Highlights terms across line breaks
- Applies highlighting in Native Viewer
- Works with tenants where stop word indexing is enabled
- Supports proximity-based searches
- Provides navigation between highlighted terms

### Known Limitations

- Does not highlight search terms with leading or trailing special characters
- Counts/includes stop words in highlights within Native Viewer
- Does not support highlighting in Query Search
- Cannot highlight non-visible metadata such as image information or indexed item metadata

## Search syntax

[Table: Arctera Personal Archive search methods and their syntax](#) describes the search methods that are available in both Quick Search and Advanced Search.

**Table: Arctera Personal Archive search methods and their syntax**

SEARCH METHOD	SYNTAX	EXAMPLE AND MORE DETAILS
Phrase search	Use double quotation marks around one or more words to search for the exact phrase.	"cloud computing" finds archived messages with this exact phrase.
AND operator search	Use the AND operator between two search terms to find items that contain both search terms.	cloud AND computing finds archived messages with both of the search terms cloud and computing .
		See <a href="#">Boolean operator searches</a> .
OR operator search	Use the OR operator between two search terms to find items that contain at least one of the search terms.	cloud OR computing finds archived messages with the search term cloud , or the search term computing , or both terms.
		See <a href="#">Boolean operator searches</a> .
NOT operator search	Use the NOT operator between search terms to exclude specific search terms.	cloud NOT computing finds archived messages with the search term cloud but not the search term computing .
		See <a href="#">Boolean operator searches</a> .
Single character wildcard search	Use a question mark at the end of a search term to represent a single unspecified character.	appl? finds archived messages with search terms such as apple or apply .
	<b>Note:</b> You must enter a search term with at least	See <a href="#">Wildcard searches</a> .

SEARCH METHOD	SYNTAX	EXAMPLE AND MORE DETAILS
	three characters before the wildcard character.	
Multiple character wildcard search	Use an asterisk at the end of a search term to represent one or more unspecified characters.	comp* finds archived messages with search terms such as computing , computer , or company .
	<b>Note:</b> You must enter a search term with at least three characters before the wildcard character.	See <a href="#">Wildcard searches</a> .
Proximity search	Place quotation marks around two search terms, followed by a tilde and a numerical value to indicate the maximum word count between them.	"cloud computing"~5 finds archived messages with the search terms cloud and computing within five words of each other.
	<b>Note:</b> Arctera Personal Archive limits the word count between the two search terms to under 50 words.	See <a href="#">Proximity searches</a> .

**Note:** Search terms are not case-sensitive. Capitalizing a search term has no effect on the search results.

## About stop words and special characters in searches

### Stop words

Stop words are a set of commonly used words that Arctera Personal Archive ignores when it performs a search. Arctera Personal Archive treats the following 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** > **Note:** The stop words are supported in English only, unless your company subscribes to the option to perform enhanced searches in Japanese.

Note the following special cases:

- The words AND, OR, and NOT act as operators in a Boolean operator search.

See [Boolean operator searches](#).

Special characters

Arctera Personal Archive omits the following special characters from searches:

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

Note the following special cases:

- Question marks and asterisks act as wildcard characters in a wildcard search.

See [Wildcard searches](#).

## Boolean operator searches

You can use the Boolean operators AND, OR, and NOT to include or exclude search terms in Quick Search and Advanced Search.

**Note:** The Boolean operators are supported in English only, unless your company subscribes to the option to perform enhanced searches in Japanese.

- See [AND operator search](#).
- See [OR operator search](#).
- See [NOT operator search](#).
- See [About using multiple Boolean operators](#).
- See [About using Boolean operators with phrase searches](#).
- See [About Boolean operators and special characters](#).

## AND operator search

The AND operator is inserted in between two search terms, for example:

**cloud AND computing**

The returned results contain both terms.

**Note:** Arctera Personal Archive treats a space between two search terms as an AND operator.

The following searches are treated identically:

**cloud computing****cloud AND computing****OR operator search**

The OR operator is inserted in between two search terms, for example:

**cloud OR computing**

The returned results contain either or both of the terms.

**NOT operator search**

The NOT operator can be inserted in between two search terms to specify that the first term must be present, and the second term must be absent. For example:

**cloud NOT computing**

Arctera Unified Platform also lets you begin a search with a NOT operator. For example:

**NOT "cloud computing"**

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

**Note:** Searches that begin with a NOT operator may fail to complete due to the large number of matching results, especially if you have a large message archive.

## About using multiple Boolean operators

You can use multiple Boolean operators in a search to create more complex searches. For example:

**cloud AND computing OR public**

In this example **cloud AND computing** represents one term.

The following items are returned:

- Items with *cloud* and *computing*
- Items with *cloud* , *computing* , and *public*
- Items with *public*

You can also use brackets to group multiple terms for Boolean processing. For example:

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

In this example, the space between **cloud** and **(computing OR public)** is treated as an AND operator.

The following items are returned:

- Items with both *cloud* and *computing* , with no reference to *software*.
- Items with both *cloud* and *public* , with no reference to *software*.

The maximum number of Boolean operators that is allowed in a search is 249.

## About using Boolean operators with phrase searches

Boolean operators can be used with phrase searches. For example:

**"cloud computing " OR "public cloud" NOT software**

This search returns the following:

- Items with *cloud computing* , with no reference to *software*.
- Items with *public cloud* , with no reference to *software*.
- Items with *cloud computing* and *public cloud* , with no reference to *software*.

## About Boolean operators and special characters

Boolean searches with special character search terms result in invalid searches. For example, if you enter the following:

**cloud OR +**

The special character + is dropped. The effect is a Boolean search with no second term, which is an invalid search.

Here is another example:

**cloud AND - AND computing**

The special character " - " is dropped. The effect is a Boolean search with two adjacent AND operators, which is an invalid search.

## Wildcard searches

A wildcard search uses a wildcard character at the end of a search term to represent one or more unspecified characters. The question mark **?** represents a single character, and the asterisk **\*** represents one or more characters.

For example:

- **app1?** finds archived messages with search terms such as *apple* or *apply*.
- **comp\*** finds archived messages with search terms such as *computing*, *computer*, or *company*.

**Note:** The wildcard character must be placed at the end of the search term. The search term must contain at least three characters before the wildcard character.

In phrase searches, the **\*** and **?** characters are treated as special characters, not wildcards.

## Proximity searches

Use a proximity search to find two words within a specified distance of each other. To create a proximity search, enclose the two words within quotation marks, and follow them with a tilde character (~) and a numerical value. For example:

## "cloud computing"~5

The numerical value specifies the maximum number of words that can exist between the words in quotes.

Note the following when using proximity searches:

- The returned results are not highlighted.
- Arctera Personal Archive limits the proximity word count to a maximum of 49 words.
- Wildcard characters cannot be used in a proximity search.
- The results from a proximity search can contain stop words, but the stop words are excluded from the proximity word count.

## Double-byte character set searches

Arctera Unified Platform provides some ability to search those languages that contain double-byte characters.

Phrase searches can be used to search for exact phrases with double-byte characters. For example:

## "敏捷的棕色狐狸" AND 3515431

An enhanced search is available for Japanese terms, if you subscribe to the option for enhanced searches in Japanese.

More Information

[About enhanced searches in Japanese](#)

## About enhanced searches in Japanese

An option is available to enable the ability to perform enhanced searches in Japanese. This option employs a Japanese language analyzer to provide better search results for different Japanese scripts.

To find out if your company's Arctera Unified Platform supports enhanced searches in Japanese, ask your Arctera Unified Platform administrator.

**Note:** Administrators can contact Arctera Services & Support for more information on the configuration of this option.

If your company's Arctera Unified Platform supports enhanced searches in Japanese, note the following about the enhanced search capabilities:

- Searches are supported in any combination of hiragana, kanji, katakana, and romaji scripts.
- Searches are valid for text in the message subject, the message body, attachment extensions, and attachment content.
- Arctera Personal Archive's Quick Search supports a minimum of two English or Japanese characters.
- The wildcard character limit for any search is one English or Japanese character.

## Using Search Filters

After you perform a Arctera Personal Archive Quick Search or Advanced Search, you can enable Search Filters to refine your search results. The Search Filter categories let you filter search results by message sender, year sent, associated tag, or attachment type.

To use Search Filters

1. Perform a Quick Search or an Advanced Search.
2. In the toolbar at the top of the browser window, click the **Filter** icon to open the Search Filters pane.
3. In the Search Filters pane, select the values in a category that you want included in your final search results.
4. Click the **Filter** icon next to the category name to apply the filter.

**Note:** You can apply more than one Search Filter to your search results. As you apply additional filters, the number of messages that are displayed in the message list continues to decrease.

## Creating Saved Searches

After you perform a Arctera Personal Archive Quick Search or Advanced Search, you can save the search criteria as a Saved Search. Saved Searches let you find the new archived messages that meet your search criteria as they are archived using Arctera Unified Platform.

To create a Saved Search

1. Perform a Quick Search or an Advanced Search.
2. In the toolbar at the top of the browser window, click **Searches then clickSave/Update Search**.
3. In the Save/Update Search window, enter a name in the Name of Saved Search field.
4. Click **Save**.

## Updating Saved Searches

After you created a Arctera Personal Archive Saved Search, you can update the search criteria that was associated with the Saved Search. You can also update the name of the Saved Search.

To update a Saved Search

1. In the toolbar at the top of the browser window, click **Searches** and select the Saved Search you want to update.
2. Update the search criteria.
3. Click **Searches then clickSave/Update Search**.
4. In the Save/Update Search window, enter a new name in the Name of Saved Search field if you want to change the Saved Search name.
5. Click **Save**.

## Deleting Saved Searches

You can delete a Arctera Personal Archive Saved Search if you no longer need it.

To delete a Saved Search

1. In the toolbar at the top of the browser window, click **Searches** and select the Saved Search you want to delete.
2. Click **Searches then clickDelete this Search**.
3. In the Delete Search window, click **Ok**.

## Searchable attachment types

Advanced Search lets you search the content of message attachments.

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

**Table:** [Searchable attachments](#) lists the attachment types that Arctera Unified Platform can search.

### Table: Searchable attachments

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)
.docx	Microsoft Word for Windows
	Microsoft WordPad
.docm	Microsoft WordPad
.dwg	AutoCAD Drawing 9.0 - 14.0

FILE EXTENSION	SEARCHABLE ATTACHMENT TYPES
.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
.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

FILE EXTENSION	SEARCHABLE ATTACHMENT TYPES
	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
.pps	Microsoft PowerPoint for Windows slide show 2007 - 2013
.ppsx	Microsoft PowerPoint for Windows slide show
.ppt	Microsoft PowerPoint for Windows 3.0 - 2013

FILE EXTENSION	SEARCHABLE ATTACHMENT TYPES
.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 & 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

FILE EXTENSION	SEARCHABLE ATTACHMENT TYPES
	Windows Metafile
.wml	Wireless Markup Language
.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
.xltn	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

## Arctera Personal Archive Search FAQs

The following frequently asked questions relate to Arctera Personal Archive search.

- Which messages can I search for in Arctera Personal Archive?

You can search for any messages in your Arctera Personal Archive archive, including messages you deleted from Microsoft Outlook.

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

See [Monitoring other accounts](#).

If you have delegate access to any archives, you can also search for email messages in those archives.

See [Viewing delegate archives](#).

- Can I search for contacts, tasks, or calendar items?

No, contacts, tasks, and calendar items are not archived using Arctera Unified Platform, so these items are not searchable in Arctera Personal Archive.

- Does capitalizing a search term affect search results?

No, search terms are not case-sensitive.

- Does Arctera Personal Archive drop any commonly used words or special characters from searches?

Yes, Arctera Personal Archive drops stop words and special characters from searches.

See [About stop words and special characters in searches](#).

- How can I search for an attachment?

To search for a specific attachment, enter the name of the attachment in the Quick Search text field. You can also search for messages with a particular attachment type using Advanced Search.

See [Using Advanced Search](#).

- How can I search for two terms at once?

Use the AND operator between the two search terms to search for both terms. You can also use the OR operator between two search terms to find items with at least one of the search terms.

See [Boolean operator searches](#).

- How can I exclude terms from my search results?

Use the NOT operator between two search terms to exclude the second term from your search results.

See [Boolean operator searches](#).

- Can I perform a wildcard search?

You can use **?** or **\*** at the end of a search term to represent one character or multiple characters, respectively. The search term must contain at least three characters before the wildcard character.

See [Wildcard searches](#).

- How can I perform a proximity search?

To perform a proximity search, place two search terms inside quotation marks, followed with a tilde and a numerical value. The numerical value you enter indicates the maximum number of words that can separate the two search terms.

See [Proximity searches](#).

- How can I search within specific email domains?

One way to search for items within a specific domain is to enter the domain name into the To field of Advanced Search.

You can use wildcards to search for a results from a group of similar domains. For example:

**mycloud\*** returns emails for the domains that begin with *mycloud*.

# Managing tags

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This section includes the following topics:

- [About Arctera Personal Archive tags](#)
- [Updating tags](#)
- [Deleting tags](#)

## About Arctera Personal Archive tags

The following tags can be applied to archived messages in Arctera Personal Archive:

PERSONAL TAG	PERSONAL TAGS LET YOU IDENTIFY ARCHIVED MESSAGES OR GROUP SEVERAL RELATED ARCHIVED MESSAGES TOGETHER BY APPLYING A SINGLE TAG TO THEM. YOU CAN CREATE, EDIT, OR DELETE PERSONAL TAGS IN ARCTERA PERSONAL ARCHIVE.
Legal hold tag	Legal hold tags let reviewers or administrators place archived messages on legal hold. The option to create legal hold tags in Arctera Personal Archive is only available to reviewers and administrators with the required permissions.
Retention tag	Retention tags are the tags that your administrator creates and let you or your administrator keep archived messages from being deleted from Arctera Unified Platform. Since your administrator manages retention tags, you cannot create, edit, or delete retention tags in Arctera Personal Archive.
	<b>Note:</b> You can only use the retention tags that your administrator 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 Insight Management Console user guide](#).

## Updating tags

You can update tags in Arctera Personal Archive by changing the tag name or tag comment.

To update a tag

1. In the toolbar at the top of the browser window, click **Tags** then **clickUpdate Tag**.
2. In the Update Tag window, select the tag you want to update.
3. Enter a new tag name in the New Tag name field.
4. Enter a new comment in the Comments field.
5. Click **Update**.

## Deleting tags

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

To delete a tag

1. In the toolbar at the top of the browser window, click **Tags** then **clickDelete 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**.