

About customer administration

This section includes the following topics:

- [About Arctera Insight Archiving customer administration](#)
- [Revision history](#)
- [Obtaining the customer and partner administration documentation](#)
- [About customers, partners, and provisioning](#)

About Arctera Insight Archiving customer administration

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Note: This guide is for Arctera internal use only.

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This guide describes how members of Arctera Arctera Insight Archiving client services can provision and manage customers in Arctera Insight Archiving.

Customer provisioning and management are performed using the Customer Service tool (CST), which is part of the Arctera Insight Management Console web application.

This guide does not describe how to provision and manage partners. For information on how to use the Partner Management tool (PAC) to create and manage partners, see the *Partner Administration Guide* which can be downloaded from the Arctera Support website.

See [Obtaining the customer and partner administration documentation](#).

Revision history

The following table lists the revision history for this guide.

Table: Customer Administration Guide revision history

DOCUMENT ISSUE DATE	CHANGE
March 2023	This guide has been updated to reflect information about Reseller Portal and Distributor Portal.
July 2018	This guide has been updated to describe the new Alta Classification secondary service. This service enables customers to integrate Arctera Insight Archiving with the Veritas Information Classifier.
	For information on classification, see the Archive Administration Help and the Insight eDiscovery User Guide .
November 2017	This guide has been updated to reflect the removal of the Salesforce ID field from the Company Details.
	The guide has also been updated to describe the new location in Odyssey Service Cloud for downloading the customer and partner administration documentation.
March 2023	This guide has been updated to reflect information about Reseller Portal and Distributor Portal.
May 2017	This guide has been updated to reflect the following change, which was made in the March 2017 release. TheAlternate Indexing Optionsfeature that was previously available only for the Sydney data center has now been rolled out to all data centers. This setting determines if indexing is performed for any languages in addition to English. Additional indexing is currently available for Japanese.
	- When you provision a new customer in any data center you must now set the indexing languages, even if English only is required.

DOCUMENT ISSUE DATE	CHANGE
	See Configuring the indexing languages for the new customer .
	- For existing customers you cannot change the indexing options from the Arctera Insight Management Console. Any changes require the assistance of the Arctera Insight Archiving Operations Team.
March 2017	The guide has been updated for the support of Google G Suite Enterprise edition Gmail archiving, as follows\:
	- The sections on Provisioning Customers and Managing Customers have been updated to add some notes regarding the configuration of domains and journaling addresses for Google G Suite Gmail archiving,
	- A new section describes the bulk provisioning of Gmail archive accounts, which uses a CSV file of users downloaded from the Google Admin console as a starting point. A new tool converts the CSV file into a format that is compatible with the user import process. See Creating Google G Suite Gmail archive accounts in bulk from a downloaded Google user list .
December 2016	For the Sydney (APJ) data center a newAlternate Indexing Optionssetting was added under theArchiving Optionstab of theCustomer Details. This setting determines if indexing is performed for any languages in addition to English. Additional indexing is currently available for Japanese. Japanese indexing enables the search facilities in Insight eDiscovery, Insight Personal Archive, and Mobile Web Access to provide better search results for different Japanese scripts.

DOCUMENT ISSUE DATE	CHANGE
	- When you provision a new customer you must set the indexing languages, even if English only is required.
	- For existing customers you cannot change the indexing options from the Arctera Insight Management Console. Any changes require the assistance of the Arctera Insight Archiving Operations Team.
November 2016	Updates for the November 2016 release of the Arctera Insight Management Console:
	- The user upload list template no longer includes a password column. Users who are provisioned from an upload list must reset their password or have it reset for them before they can access Arctera Insight Archiving. See Creating and updating archive accounts in bulk from a user upload list.
	- The assignment of an Oracle ID is now mandatory when you provision a customer or edit a customer's company details. If you enter an Oracle ID that is already assigned to another customer, a Confirm dialog lists the existing assignments and lets you choose whether to continue.
August 2016	A change has been made to the user interface option that creates archive accounts from a client's user upload list. The option no longer includes an Is Partial Import check box. Previously unless you selected this check box, the process deleted any existing archive accounts for users not on the list. Now, existing archive accounts for unlisted users always remain unchanged.
	See Creating and updating archive accounts in bulk from a user upload list .

DOCUMENT ISSUE DATE	CHANGE
December 2015	Minor updates for the release of the rebranded Arctera Insight Management Console user interface.
October 2015	Updates to describe the new Transaction ID Confirmation tab for ERP billing in Customer Details.
	Rebranding for Arctera.
August 2015	- Updates for the August 2015 release of the Arctera Insight Management Console: The Export to Excel option on the Accounts tab of the Customer Details page has been modified. The output file no longer includes any password information. You no longer have the option to reset the passwords for users who have not logged on to their archive accounts.
	- The description in this guide of the Customers page now indicates that Archive size is shown in MB.
May 2015	- Updates for the May 2015 release of Arctera Insight Management Console: Description of the new Lync On-Premise Archiving secondary service, and the new Lync OnPrem mail server type for journal addresses.
	- Removal of the information on using the Bulk Import tab on the Customer Details page. The Domino Bulk Import feature is now deprecated.
	- Revised instructions on how to obtain the customer and partner administration documentation.
February 2015	First publication in this format.

Obtaining the customer and partner administration documentation

The documentation for Arctera Insight Archiving customer and partner administration is available to download in PDF format from the internal channel of the Arctera Support website.

To obtain the customer and partner administration documentation

1. Go to the following URL:

https://isearch.veritas.com/internal-search/en_US/article.100040223.html

1. If you are prompted, log on to the Arctera Single Sign-On portal.
2. The customer and partner administration guides are provided as attachments to the displayed article.

About customers, partners, and provisioning

About customers, partners, and provisioning

The terms customer, partner, and provisioning all have specific meanings in the context of Arctera Insight Archiving:

- Provisioning refers to the creation of new instances of email archives, and the configuration of primary and secondary services in Arctera Insight Archiving. Provisioning also encompasses providing all of the necessary archive software and access permissions.
- A customer is a company that receives an Arctera Insight Archiving archive and archive services for its own use.

A customer can access the Archive Administration tab in the Arctera Insight Management Console, from where it can manage its own users and services, and generate reports.

- A partner resells Arctera Insight Archiving services, and has the rights to manage customer archives created under the partner group on behalf of customers. A partner may or may not also be a customer. A child partner resells archive services, and is managed by its parent partner. A partner customer is the customer of a child partner.

A partner cannot create child partners or customers under its own instance, and it cannot add or remove services. These actions require an order to be placed through Arctera.

A partner or child partner can access the following tabs of the Arctera Insight Management Console, subject to the services it is licensed for.

Table: Arctera Insight Management Console tabs and their purpose

TAB IN ARCTERA INSIGHT MANAGEMENT CONSOLE	DESCRIPTION
Partner Management tab	Provides access to the Partner Management tool, for provisioning and managing child partners.
Customer Service tab	Provides access to the Customer Service tool, for provisioning and managing customers.
Archive Administration tab	Provides access to the Archive Administration tool, for managing your own company's archive.

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Note: The tools and options that are available to you also depend on the administration roles that are assigned to the Arctera Insight Archiving administrator account with which you access the Arctera Insight Management Console.

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Using the Customer Service tool

This section includes the following topics:

- [About the Customer Service tool](#)
- [Accessing the Customer Service tool](#)

About the Customer Service tool

The Customer Service tool of Arctera Insight Management Console lets you provision and manage Arctera Insight Archiving customers. The tool enables you to do any of the following, if you have the required privileges:

- Create, manage, enable, and disable Arctera Insight Archiving customers.
- Upload lists of user accounts for the provisioning of archive accounts for a customer.
- Configure the initial archiving options for a customer.
- Configure additional options if required, such as trusted networks to control from where a customer can access its archive.
- View reports on customer archive usage, and set up customer subscriptions to the reports.
- View details about resellers and distributors, and generate their billing report.
- Configure and assign Customer Service roles, to manage your company's access to the Customer Service tool.

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Note: Activities that are performed in the Customer Service tool are not logged, and are not available for review.

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Accessing the Customer Service tool

To access the Customer Service tool, use Mozilla Firefox and Google Chrome. Event though, it is recommended to refer to the [Arctera Insight Archiving Compatibility List](#).

To access the Customer Service tool you require the credentials of an administrator account that is assigned a Customer Service administration role. The Customer Service administration roles allow access to the areas of Customer Service that are required to perform a particular administration function.

See [About Customer Service administration roles](#).

To access the Customer Service tool

1. In a supported web browser, enter your Arctera Insight Archiving administration URL.

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Note: Ask your Enterprise Vault company administrator if you do not know the administration URL, or if you need access permission.

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2. On the Login page, select a security option:

THIS IS A PUBLIC OR SHARED COMPUTER	THE MANAGEMENT CONSOLE PROMPTS YOU FOR YOUR CREDENTIALS EACH TIME YOU ACCESS THE LOGIN PAGE AND AUTOMATICALLY LOGS YOU OUT AFTER 20 MINUTES OF INACTIVITY.
	THIS OPTION IS THE DEFAULT OPTION.
This is a private computer	The Management Console caches your credentials for one year and lets you bypass the Login page for the current browser session after you log in successfully.
	To clear your credentials from the cache, log out of the Management Console.

3. Enter your Arctera Insight Archiving administrator account user name and password.
4. Click **Log In**.

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Note: After five consecutive incorrect password tries, an account is locked out of the Management Console. You can reset your password at any time with the [Forgot Password](#) link on the login screen. Arctera Insight Archiving emails a new password to the account's primary email address.

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5. You may have access to multiple areas of the Management Console, depending on your account permissions. If the Customer Service tool is not your default view in the Management Console, click the Customer Service tab at the bottom of the left navigation pane.

My Config

This section includes the following topics:

- [Viewing your company's configuration details](#)

Viewing your company's configuration details

The My Config page of Customer Service provides information on your own company's Arctera Insight Archiving archive configuration. The information includes the company's archiving options, the accounts it has created, and other details such as the networks that are trusted for archive access.

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Note: The information on the My Config page is read-only and is for information only, except where stated.

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To view your company's configuration details

1. In the left navigation pane of Archive Administration Console, select **Customer Service>My Config**.
2. The My Config page displays your company's configuration details on a series of tabs. Some of the tabs are hidden if your Arctera Insight Archiving configuration does not support the associated features.

Company Details tab

The Company Details tab provides details your own company's core Arctera Insight Archiving configuration settings.

The information on this tab is displayed in a number of sections as follows:

- Company Details lists the company name, the parent partner name if applicable, the billing number, and Oracle ID. This section also shows whether the company can perform retention

management. Other information includes the company archive creation date, the last update time, the last access time, and the default time zone settings.

Click Admin Account details to view the details of the company's primary administrator account.

- Services contains information about the primary Arctera Insight Archiving services and the secondary Arctera Insight Archiving services that your company has purchased.
- Domains contains information about the domains that are enabled for your company.
- Email Continuity Options contains information about the optional Email Continuity service, if it is configured for your company. Email Continuity provides a back-up email system if your company's primary mail server fails.
- Journal Addresses lists the email addresses and the associated mail server types that are configured for the journaling of your company's mail. The emails that you journal from your servers to these addresses are available to store in your company's archive.

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Note: To view the Arctera Insight Archiving archive access and management URLs for your company, click Archive Access URLs in the button bar at the top of the page.

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Archiving Options tab

The Archiving Options tab shows details of the archiving options for your own company archive. The information includes the type of email that is saved, and for which users it is saved.

The displayed information is divided into a number of sections as follows:

- Archiving Options contains details including whether users can send, reply, and forward emails within the archive. It also shows whether BlackBerry messages are saved, the number of days to store email, and whether new archive accounts are auto-generated.
- Exclusion Options contains information about users who are excepted from archiving or specifically selected for archiving.
- Email Direction indicates whether inbound emails, outbound emails, and internal emails are archived.

- Active Folder Synchronization indicates whether the Folder Sync tool is enabled to provide folder synchronization from users' Outlook accounts to their Insight Personal Archive. If folder synchronization is configured, this section also shows the number of users that Folder Sync has synchronized, and the time of the last folder synchronization run.

Accounts tab

The Accounts tab shows details of all of the accounts that are assigned to your own company's archive, including the following information:

- Email Address
- Role \- whether the account has the Account, Reviewer, or Admin role in Archive Administration.
- Last name
- First name
- Aliases for the account, if applicable.
- Archive Active \- whether Arctera Insight Archiving currently archives emails for the account.
- Personal Archive \- whether the account can access Insight Personal Archive.
- Insight eDiscovery \- whether the account can access Insight eDiscovery.
- \- whether the account can access

Authentication Management tab

The Authentication Management tab shows the Arctera Insight Archiving authentication service settings for your company.

This tab is editable if you have the required privileges.

For more information about authentication management, see the Arctera Insight Archiving [Authentication Management Guide](#), which is included in the Arctera Insight Archiving Archive Administration Help.

Trusted Networks tab

The Trusted Networks tab provides details of any trusted networks that your own company has configured to limit access to the company's archive.

For each trusted network the tab shows:

- The starting and ending IP address for the network
- Whether the network has access to Manage, that is the Arctera Insight Management Console.

- Whether the network has access to DA/PA, that is Insight Personal Archive and Insight eDiscovery.

Mail Monitoring tab

The Mail Monitoring tab displays information about hourly mail volumes and sample emails for your own company's archive.

The Hourly Mail Volume chart and table indicate the quantity of mail that Arctera Insight Archiving received during each hour, within the last few hours.

The Today's Sample Emails table lists the sample emails for examination.

Retention tab

The Retention tab is available if your parent company or provisioner allows access to the archive's mail retention settings.

The Retention tab shows:

- Default Retention Period: The retention period for the company-wide retention policy.
- Storage Expiry: How often the checks are run to look for any items that are due for removal.
- Retention Policies: A table of retention policies that are configured for your company.

For more information on configuring the mail retention settings, see the [Retention Management](#) section of the *Archive Administration Help*.

Provisioning customers

This section includes the following topics:

- [About provisioning a customer](#)
- [Stages of customer provisioning](#)
- [Arctera Insight Archiving customer provisioning prerequisites](#)
- [Provisioning a customer](#)
- [Configuring the MYOK feature](#)
- [Configuring the indexing languages for the new customer](#)
- [Configuring the archiving options for a new customer](#)
- [Obtaining the credentials of a customer's primary administrator account](#)
- [About creating additional administrator accounts for a customer](#)
- [Creating and updating archive accounts in bulk from a user upload list](#)
- [Creating Google G Suite Gmail archive accounts in bulk from a downloaded Google user list](#)
- [Confirming the completion of the new customer order](#)

About provisioning a customer

To add a customer to Arctera Insight Archiving you must create the customer's archive instance and set up the customer's administrator accounts. To complete the provisioning you can create the customer archive accounts from the client's user upload list, and configure the initial archiving options.

When you have completed the provisioning of a customer, the customer can assume all the administrative and managerial responsibilities for its archive.

Stages of customer provisioning

[Table: Steps to provision a customer in Arctera Insight Archiving](#) lists the process for provisioning a new customer in Arctera Insight Archiving.

Table: Steps to provision a customer in Arctera Insight Archiving

STEP	ACTION	REFERENCE
Step 1	Obtain the prerequisite information.	See Arctera Insight Archiving customer provisioning prerequisites .
Step 2	Create the archive instance for the customer.	See Provisioning a customer .
Step 3	Set the indexing languages for the new customer.	See Configuring the indexing languages for the new customer .
Step 4	Configure the archiving options for the new customer.	See Configuring the archiving options for a new customer .
Step 5	Obtain the details of the customer's primary administrator account.	See Obtaining the credentials of a customer's primary administrator account .
Step 6	Create additional administrator accounts for the customer, if required.	See About creating additional administrator accounts for a customer .
Step 7	Create bulk archive accounts from the client's user upload list.	See Creating and updating archive accounts in bulk from a user upload list .
Step 8	Confirm that you have completed the ERP system order to provision the new customer.	See Confirming the completion of the new customer order .

Arctera Insight Archiving customer provisioning prerequisites

Before you can provision a customer you must distribute the following documents to the client for completion and return:

- Onboarding checklist. The client completes this Microsoft Word document to provide an overview of their email environment, including mail server information and usage statistics. The

answers to these questions help to ensure that the correct settings are configured during the implementation of the archive.

The onboarding checklist template file can be downloaded from the Arctera Support website.

- User upload list. The client uses this Excel spreadsheet to provide details of the mail accounts for which archive accounts are required. You can use this list to perform the bulk creation or update of archive accounts for the client. The bulk process creates an archive account for each user in the list who does not already have one. If a listed user already has an archive account, the archive account is updated with any changed details that the list specifies. Any existing archive accounts for unlisted users remain unchanged.

See [Creating and updating archive accounts in bulk from a user upload list](#).

The client can choose to provision a subset of their mail accounts if they want. Make sure that the client understands that if an archive account does not exist then Arctera Insight Archiving archives the mail to the Unassigned Legacy account .

The required information for each account includes the user's first name, last name, primary email address, and any alias email addresses. A template file for the user upload list contains annotations to explain the required content for each column. The user upload template file can be downloaded from the following article on our Support website:

<http://www.veritas.com/docs/000075300>

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Note: For Google G Suite Gmail users we can bulk-provision from a user list that the customer has exported from G Suite. See [Creating Google G Suite Gmail archive accounts in bulk from a downloaded Google user list](#).

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When you provision a customer you need the ERP billing system transaction ID for the customer order. You enter the transaction ID when you confirm that the transaction has been completed, at the end of the provisioning process.

Provisioning a customer

You must create an archive instance for a customer as an initial provisioning step.

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Note: Only provisioners with the required administrator permissions can create new customers.

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To create the archive instance for a customer

1. In the left navigation pane of Archive Administration Console, select **Customer Service>Customers**.
2. On the Customers page, click **Add Customer**.
3. In **Company Details**, select the **Parent Partner** :
 - To provision a direct customer, select **Symantec Hosted Exchange (SHS)**.
 - To provision a customer for a partner, select that partner as the parent partner.
4. Complete the remainder of the options in the Company Details section, as follows:

COMPANY STATUS	THIS OPTION SHOULD BE SET TO ENABLE .
Company Type	Select from the following\:
	- Production : Customer has purchased the service.
	- Trial : Customer has chosen to trial the service.
	- Demo : Use for internal or test accounts only.
Organization Size (Trial Companies Only)	If you chose Trial as the company type, indicate the number of trial users.
Number of Days Trial (Trial Companies Only)	If you chose Trial as the company type, enter the number of days for the trial period.
Company Name	Enter the name for the new customer company.

COMPANY STATUS	THIS OPTION SHOULD BE SET TO ENABLE .
Parent Partner	Select the parent partner or upstream partner who created the current partner.
	If you are creating a partner, this field allows you to create a new partner on behalf of a downstream partner.
Advanced Service Contract	Select this check box only if the customer purchased through the advanced service provider. This field indicates the customer purchases through or is an advanced service provider.
Oracle ID	Enter the Oracle ID for the customer. This field is mandatory.
	If you enter an Oracle ID that is already assigned to one or more customers, a Confirm dialog shows the details of those assignments. You can then choose whether to continue with the specified Oracle ID.
Storage Capacity	Specify the storage space (in TB) to be provided to the customer.
Manage Retention Settings	Select this option only if you want the customer to be able to configure its retention management settings.
	Note: For more information about setting up retention management, see the section about retention management in the Archive Administration help.
Manage WORM Settings	Select this check box if the customer has purchased a 7 year or a 10 year Veritas Insight eDiscovery Suite option.
	By default, this option is disabled. To enable this option, under Services > Primary

COMPANY STATUS	THIS OPTION SHOULD BE SET TO ENABLE .
	Services , you must select the Insight eDiscovery check box.
	Note: WORM stands for Write Once Read Many. It is a non-rewritable and non-erasable data storage media that -
	- Prevents accidental or intentional erasure of data
	- Authenticates time and date of data storage
	- Protects stored data for a specific retention period
WORM Policy Period	This option appears only after you select the Manage WORM Settings check box.
	You can configure the retention time for which the customer data must be retained after it is committed to WORM storage.
	- Select the 7 Years option if the customer has purchased a 7 year Veritas Insight eDiscovery Suite.
	- Select the 10 Years option if the customer has purchased a 10 year Veritas Insight eDiscovery Suite.
	The data committed to WORM storage cannot be deleted till the retention period expires. Once the retention duration has expired, the storage system allows the deletion of the file.
	Note: After specifying the WORM Policy Period and the Services for which you want to manage WORM settings, the Stock Keeping Units (SKUs) are available for the customer. The SKUs can be released for -

COMPANY STATUS	THIS OPTION SHOULD BE SET TO ENABLE .
	- Primary services - Personal Archive, Insight eDiscovery, and Email Continuity
	- Secondary service - Alta Classification
	When you provision a customer, the following SKUs are available:
	- A SKU for 7 years retention period, if you select the 7 Years option.
	- A SKU for 10 years retention period, if you select the 10 Years option.
	- A SKU without any WORM policy, if you do not select the Manage WORM Settings option.
Enable Import Data	Select this check box to enable administrators of the customer to view the Import Data option.
Enable File Collector	Select this check box to enable administrators of the customer to enable files collection using archive collectors.
Manage Your Own Encryption Keys (MYOK)	Select this check box to enable customer administrator to manage its own encryption key, instead of using the Microsoft Azure encryption key.
	Note: After enabling this feature, when the customer administrator logs in to the Arctera Insight Management Console for the first time, the customer can see the Service Alert window. The window displays the steps to complete the MYOK configuration on the Microsoft Azure portal. To understand the configuration process in detail, the customer administrator can access the link provided on the same window. Until the MYOK

COMPANY STATUS	THIS OPTION SHOULD BE SET TO ENABLE .
	configuration is completed, the Arctera Insight Management Console restricts the customer administrator from using any other features.
Default Time Zone	Select a default time zone for the customer. The customer administrator can change the time zone if they want.
Default Date Format	Select a default date format for the customer. The customer administrator can change the date format if they want.

5. In the Services section, under Primary Services, do as follows:

- Select each primary service that the customer requires:

PERSONAL ARCHIVE	ALLOWS AN ADMINISTRATOR TO DEPLOY INSIGHT PERSONAL ARCHIVE AND CREATE NEW ARCHIVES.
Insight eDiscovery	Allows an administrator to designate Insight eDiscovery reviewers.
Email Continuity	Lets you configure the optional Arctera Insight Archiving Email Continuity service. If you select this service, the Email Continuity Options section becomes available on the Company Details tab to enable you to configure settings for this service.
	For more information about provisioning the Email Continuity service, see the Arctera Insight Archiving Email Continuity Provisioning Guide , which is available from the our internal Support website.
	See Obtaining the customer and partner administration documentation .

PERSONAL ARCHIVE	ALLOWS AN ADMINISTRATOR TO DEPLOY INSIGHT PERSONAL ARCHIVE AND CREATE NEW ARCHIVES.
-	Allows an administrator to designate reviews.

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Note: For more information about any primary service, point to its name in theProductcolumn.

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- For each selected primary service, in the Add # Users (Minimum) box, enter the number of users. This column does not apply for Demo company types.

6. In the Services section, under Secondary Services, select which secondary Arctera Insight Archiving services the customer requires:

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Note: The selections you made in step5determine which secondary services are available.

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PERSONAL ARCHIVE FOR BLACKBERRY	ENABLES SUPPORT FOR PERSONAL ARCHIVE FOR BLACKBERRY. IF YOU SELECT THIS SERVICE, ADDITIONAL OPTIONS APPEAR IN THE ARCHIVING OPTIONS SECTION OF THE ARCHIVING OPTIONS TAB TO LET YOU CONFIGURE WHETHER AND HOW BLACKBERRY MESSAGES ARE ARCHIVED.
Exchange Folder Synchronization	Enables support for the optional ArchiveTools Folder Sync application. If you select this service, the Active Folder Synchronization options become available on the Archiving

PERSONAL ARCHIVE FOR BLACKBERRY	ENABLES SUPPORT FOR PERSONAL ARCHIVE FOR BLACKBERRY. IF YOU SELECT THIS SERVICE, ADDITIONAL OPTIONS APPEAR IN THE ARCHIVING OPTIONS SECTION OF THE ARCHIVING OPTIONS TAB TO LET YOU CONFIGURE WHETHER AND HOW BLACKBERRY MESSAGES ARE ARCHIVED.
	Options tab to let you enable or disable Folder Sync.
SharePoint Archiving	Enables support for the optional ArchiveTools for SharePoint feature, which lets users of Insight eDiscovery direct SharePoint documents to their archive. This option requires the Insight eDiscovery primary service to be selected.
Salesforce Chatter Archiving	Enables support for archiving of Salesforce Chatter messages. This option requires the Insight eDiscovery primary service to be selected.
Office 365 Personal Archive Collection	This feature is no longer supported.
Box File Archiving	Enables support for the archiving of files from specified Box accounts.
Lync On-Premise Archiving	Enables support for the archiving of conversations from a Microsoft Lync on-premises server, using the Arctera Insight Archiving Lync Connector on-premises application.
	Note: If you select this option then under Journal Addresses you must configure at least one journal address with the mail server type Lync OnPrem.
Alta Classification	Enables support to analyze the emails to assign classification tags.

PERSONAL ARCHIVE FOR BLACKBERRY	ENABLES SUPPORT FOR PERSONAL ARCHIVE FOR BLACKBERRY. IF YOU SELECT THIS SERVICE, ADDITIONAL OPTIONS APPEAR IN THE ARCHIVING OPTIONS SECTION OF THE ARCHIVING OPTIONS TAB TO LET YOU CONFIGURE WHETHER AND HOW BLACKBERRY MESSAGES ARE ARCHIVED.
Bloomberg Archiving	Enables support for the archiving of Instant Bloomberg and Bloomberg messages.
Microsoft Teams	Enables support for the archiving of Microsoft Teams messages (chats, public channels, and private channels).
OneDrive for Business	Enables support for the archiving of files and folders of OneDrive for Business.

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Note: For more information about any secondary service, point to its name in theProductcolumn.

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7. Under Domains, specify one or more domains for the company as follows:

- In the Domain box, type in a domain name, omitting the "www" prefix. The domain name cannot include any special characters.

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Note: For Google G Suite Gmail archiving, enter the domain name that the customer has registered with Google.

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- Click **Add**.

- To specify more domains, repeat the first two steps. You can specify as many domains as required.
- If you specify more than one domain, choose which domain is the primary domain by selecting the **Primary Domain** check box next to that domain.

8. If you selected Email Continuity as a primary service in step 5, then in the Email Continuity Options section, specify the following:

- **EC Method** : Select the AV/AS provider from the drop-down menu.
- **Mail Server** : Type in the IP address of the mail server for the Email Continuity service.
- **Domain Name** : Select the domain name from the drop-down menu.

Then click **Add** to add the continuity options.

1. In the Journal Addresses section, enter the journaling information as follows:

- In the Address box, type in the journal address for the customer, without the "www" prefix. The journal address cannot include any special characters, other than a dash.

Then, from the drop-down menu that is adjacent to the Address box, select the journaling domain. The menu lists any custom journal domains for the partner, its child customers, and child partners.

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Note: For Google G Suite Gmail journaling, the journal address should match the journal address that you provide to the customer for specifying in the Google Admin console.

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- In the Mail Server Type box, select the mail server type from the drop-down menu.

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Note: For Google G Suite Gmail journaling, select Google Journal.

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- Click **Add** to add the journal address details.

- To add another journal address, repeat the above steps. Bear in mind that customers typically journal to one address only for each mail server type.

1. Click **Save** at the top of the page to save the configuration and create the customer archive instance.

The Company Details page refreshes and a message appears at the top of the page confirming that the customer has been added successfully.

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Note: You must set the customer's indexing languages to complete the initial setup. See [Configuring the indexing languages for the new customer](#).

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Configuring the MYOK feature

Configuring the MYOK feature is a multi-stage process that involves actions from both, the Arctera Insight Management Console administrator and the customer administrator.

- Firstly, the Arctera Insight Management Console administrator enables the customer administrator to configure MYOK feature independently.
- Later, the customer administrator logs in to the Arctera Insight Management Console and completes the configuration process solely.

When the customer administrator logs in to the Arctera Insight Management Console, the Service Alert window appears and instructs the customer administrator to complete the MYOK configuration on the Microsoft Azure portal. To understand the configuration process, the customer administrator can access the link provided on the same window. Until the MYOK configuration is completed, the Arctera Insight Management Console restricts the customer administrator from using any other features.

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Note: For detail information, refer to [Arctera Insight Archiving Key Management](#).

“ ”

The entire MYOK feature configuration process involves the following stages:

- Stage 1: Enabling the MYOK feature for a customer
- Stage 2: Installing the Azure App and assigning role to it
- Stage 3: Creating a storage account with customer's managed key

Stage 1: Enabling the MYOK feature for a customer

During the initial provisioning of a new customer, the Arctera Insight Management Console administrator can access the MYOK feature on the Company Details page. After the customer has been created, this option becomes unavailable.

“ ”

Note: The non-MYOK enabled customers can contact Veritas support to avail this option, however, the process incurs additional time and cost.

“ ”

To enable the MYOK feature for a customer

1. In the left navigation pane, select **Customer Service>Customers**.
2. On the **Company Detail**stab, while specifying the required customer details, select the**Manage Your Own Encryption Keys** check box as shown in the sample image below.

Company Details

Company Name *
Enter the company name

Parent Partner *
LiveOffice

☐ Advanced Service Contract

Oracle ID *
Enter the oracle ID

Storage Capacity
TB

☐ Manage Retention Settings

☐ Manage WORM Settings

☐ Enable Import Data

☐ Enable File Collector

☒ **Manage Your Own Encryption Keys**

Default Timezone
(GMT-08:00) Pacific Time (US & Canada)

Default Date Format
mm/dd/y

Save

3. Click **Save**.

The application enables the customer to use the MYOK feature.

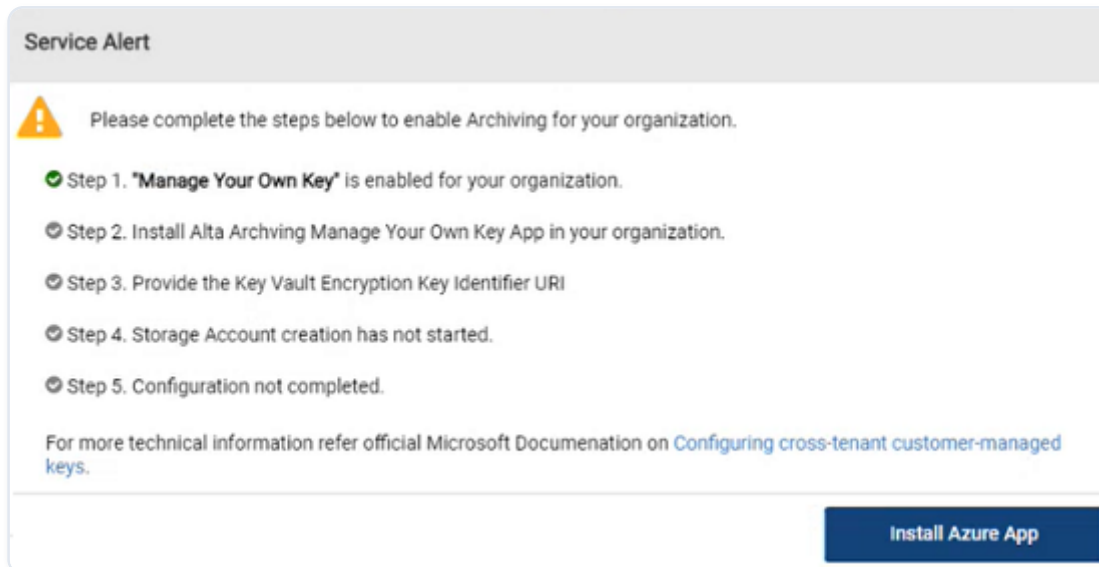
Stage 2: Installing the Azure App and assigning role to it

Prerequisites

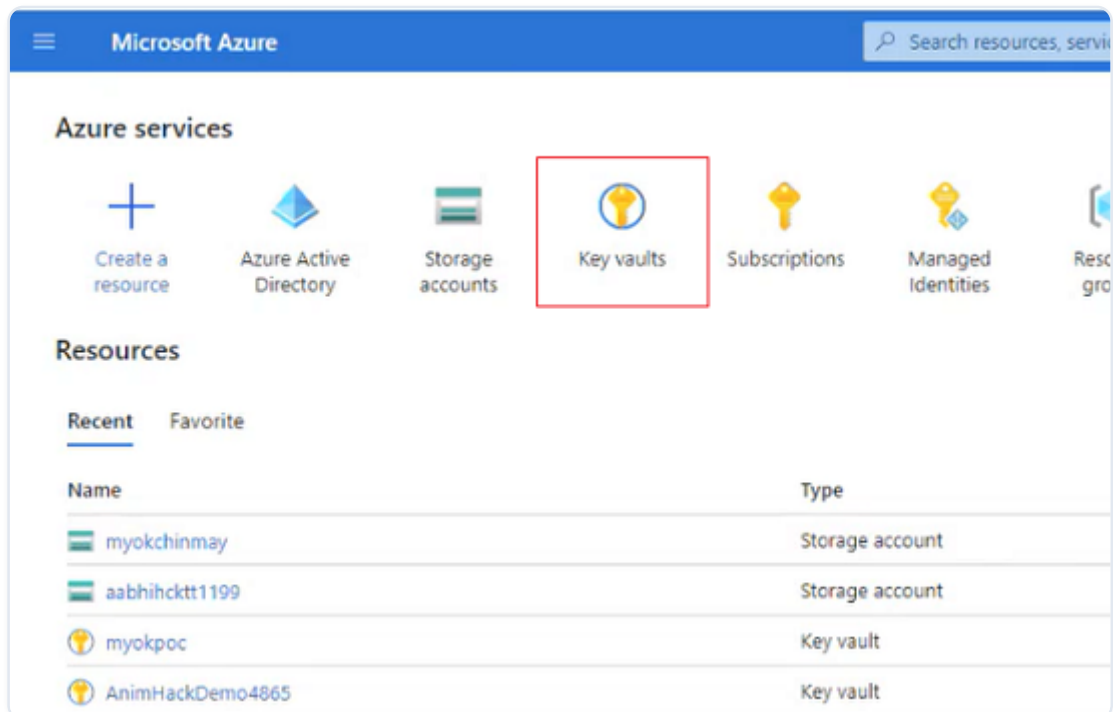
- The customer administrator must log in using *Azure Org User* credentials to install the Azure app and create the encryption keys. The Microsoft user on the tenant cannot perform these activities.
- The customer administrator requires both, the *Application Administrator* role to install the Azure app and the *Subscription Owner* role to create encryption keys.
- The customer administrator needs to create a Key Vault in the Azure subscription, prior to the Azure app installation.

To install the Azure App and assigning role to it

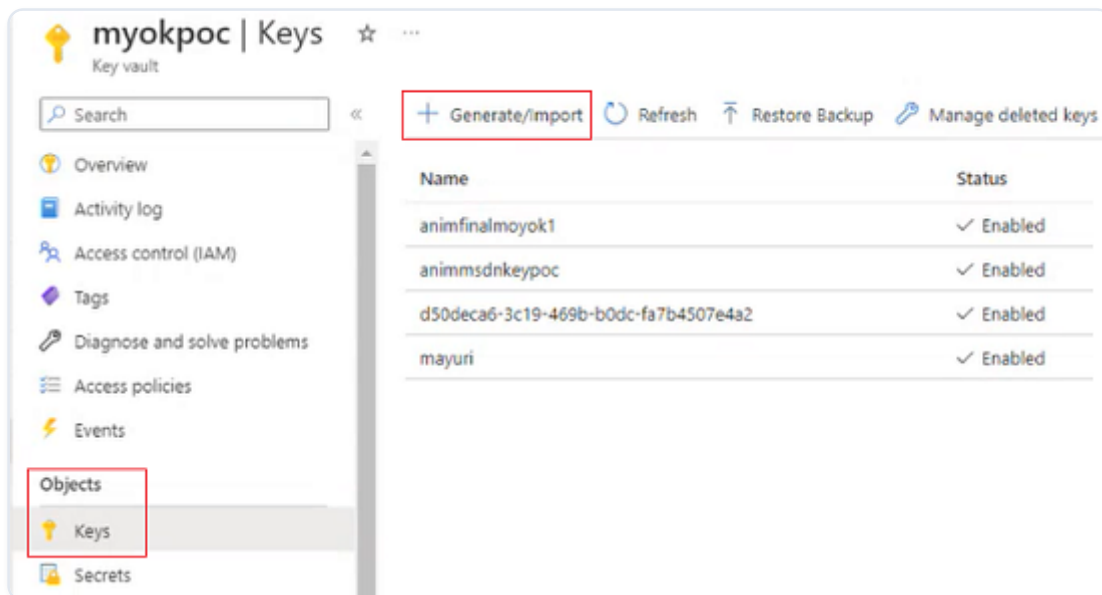
1. Ensure that the **Service Alert** window appears after you log in to your Arctera Insight Management Console.



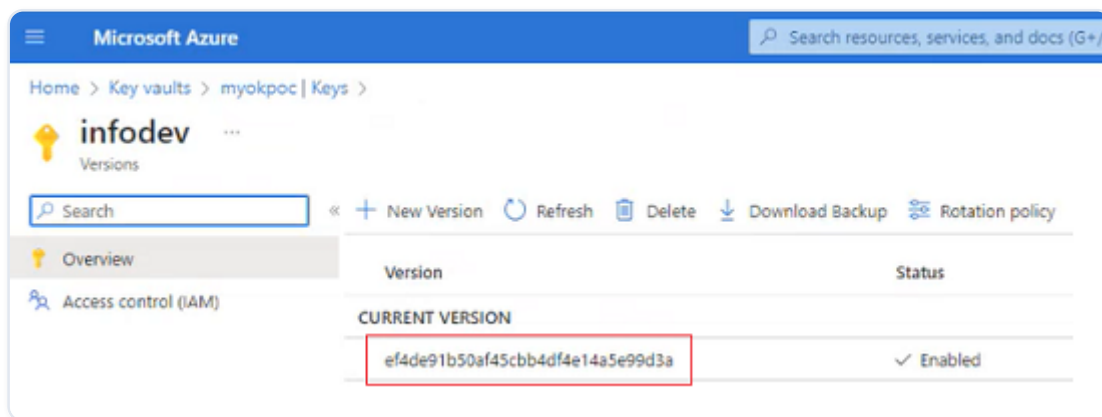
2. Click **Install Azure App** to initiate installation on your Microsoft Azure subscription. The application redirects you to log in to your Microsoft Azure subscription.
3. After login, select **Home>Key Vault** to access your key vault.



4. In the left navigation pane of the **Key Vault** page, select **Objects>Keys**, and click **Generate/Import**.

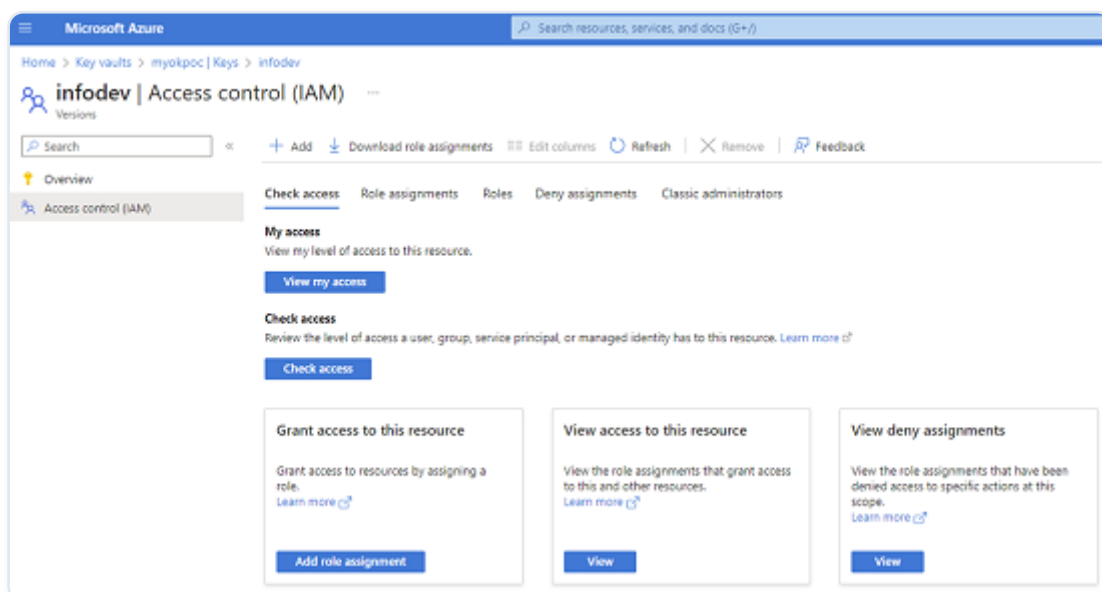


5. On the **Create a key** page, select the required key configuration, and click **Create**.

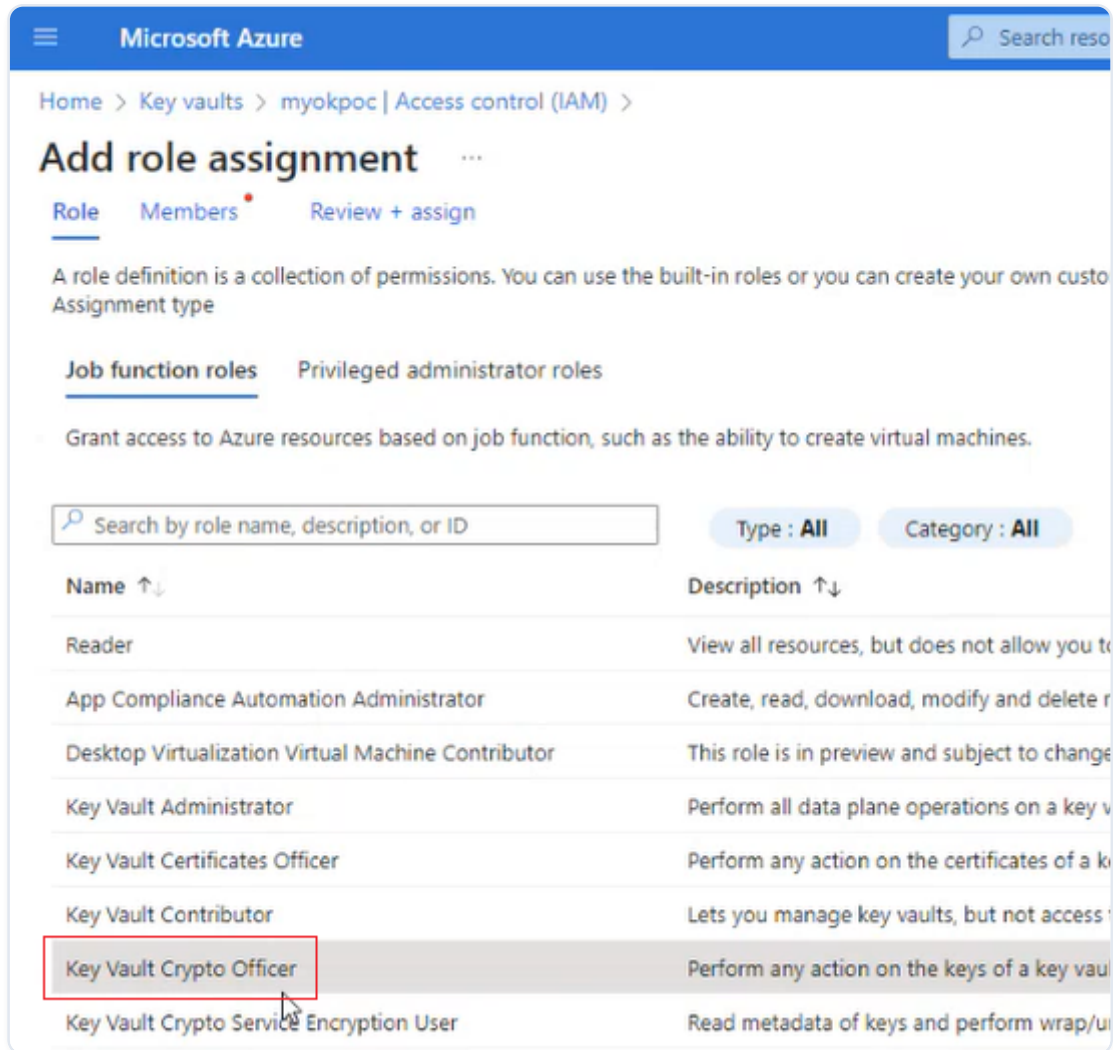


The application generates the encryption key. Click the key value to view its details.

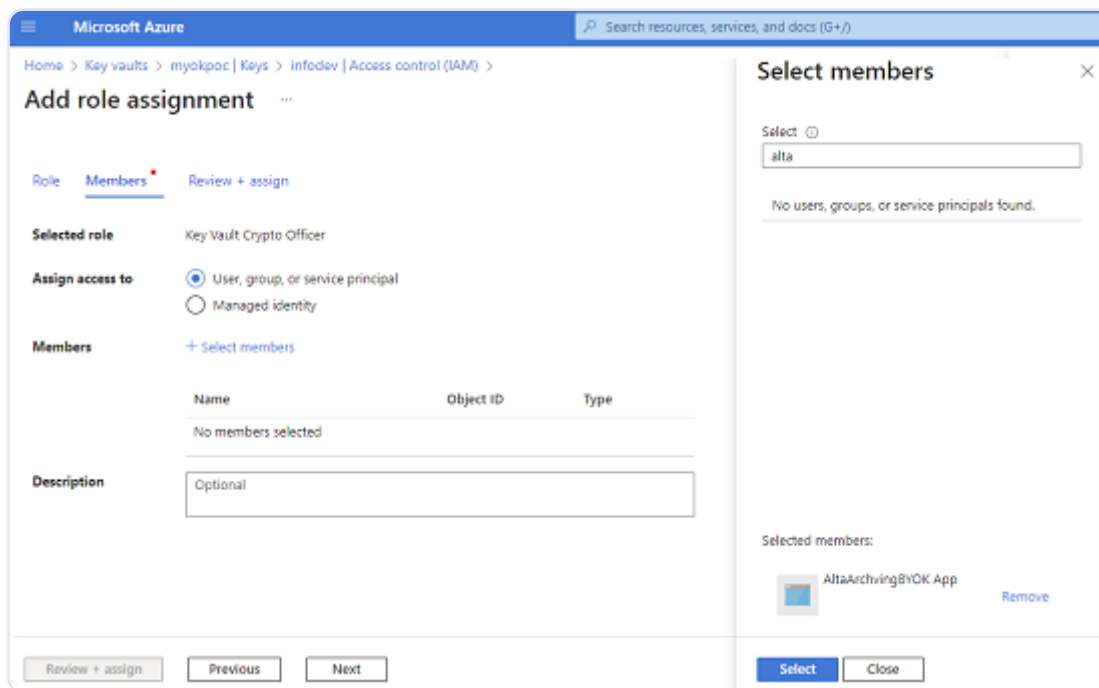
1. On the key details page, select **Access Control** > **Check Access** tab, and click **Add Role Assignment**.



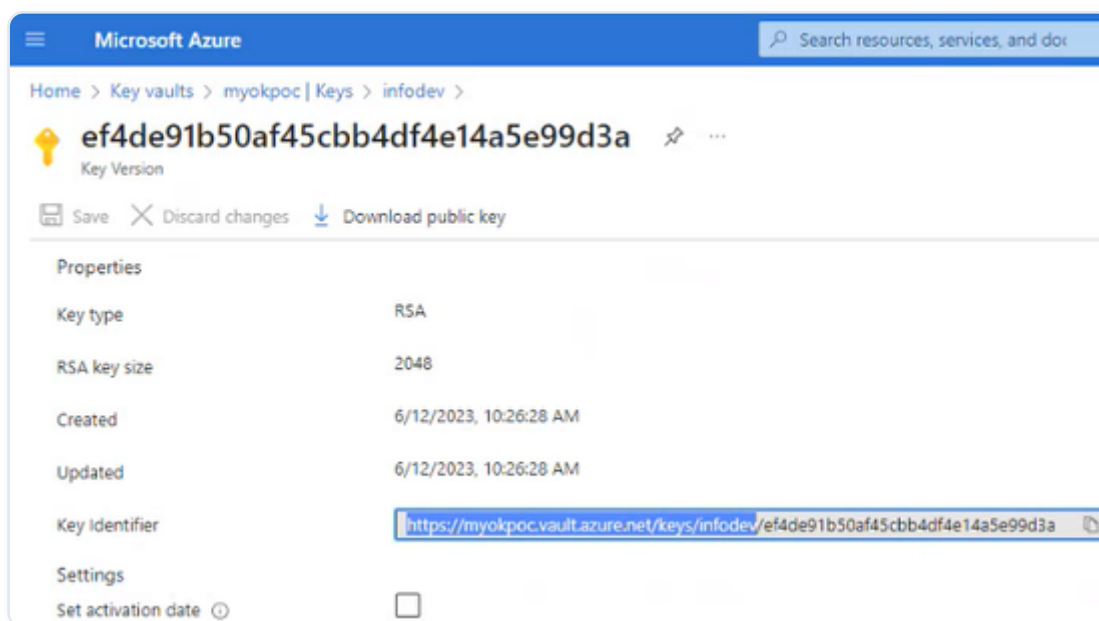
- On the **Role** tab, assign the **Key Vault Crypto Officer** role to the installed Azure app.



- On the **Member** tab, click **Select Members** and select the Azure app as a member. Then, click **Review + assign**.



4. From the key vault, copy the key from the **Key Identifier** field.



Stage 3: Creating a storage account with customer's managed key

To create a storage account with customer's managed key

1. Paste the key Identifier URI into the **Key Vault Encryption Key Identifier URI** field on the **Service Alert** window, and click **Save Storage Uri**.

Service Alert

 Please complete the steps below to enable Archiving for your organization.

 Step 1. "Manage Your Own Key" is enabled for your organization.

 Step 2. Alta Archiving Manage Your Own Key App has been successfully installed in your organization.

 Step 3. Provide the Key Vault Encryption Key Identifier URI

Key Vault Encryption Key Identifier URI

<https://myokpoc.vault.azure.net/keys/infodev/ef4de91b50af45cbb4df4e14a5e99d3a>

 Step 4. Storage Account creation has not started.

 Step 5. Configuration not completed.

For more technical information refer official Microsoft Documenation on [Configuring cross-tenant customer-managed keys](#).

Save Storage Uri

The storage account creation process with your managed encryption key initiates in the background.

- After successfully creating the storage account, verify that the **Service Alert** window displays completion of all steps, and click **Acknowledge** to confirm successful configuration of the MYOK feature.

Service Alert

 You have completed the steps to enable Archiving on your organization. Click "Acknowledge" to not see this message again, Else click "Skip".

 Step 1. "Manage Your Own Key" is enabled for your organization.

 Step 2. Alta Archiving Manage Your Own Key App has been successfully installed in your organization.

 Step 3. Key Vault Encryption Key Identifier URI has been successfully added.

 Step 4. Storage Account created.

 Step 5. Configuration completed.

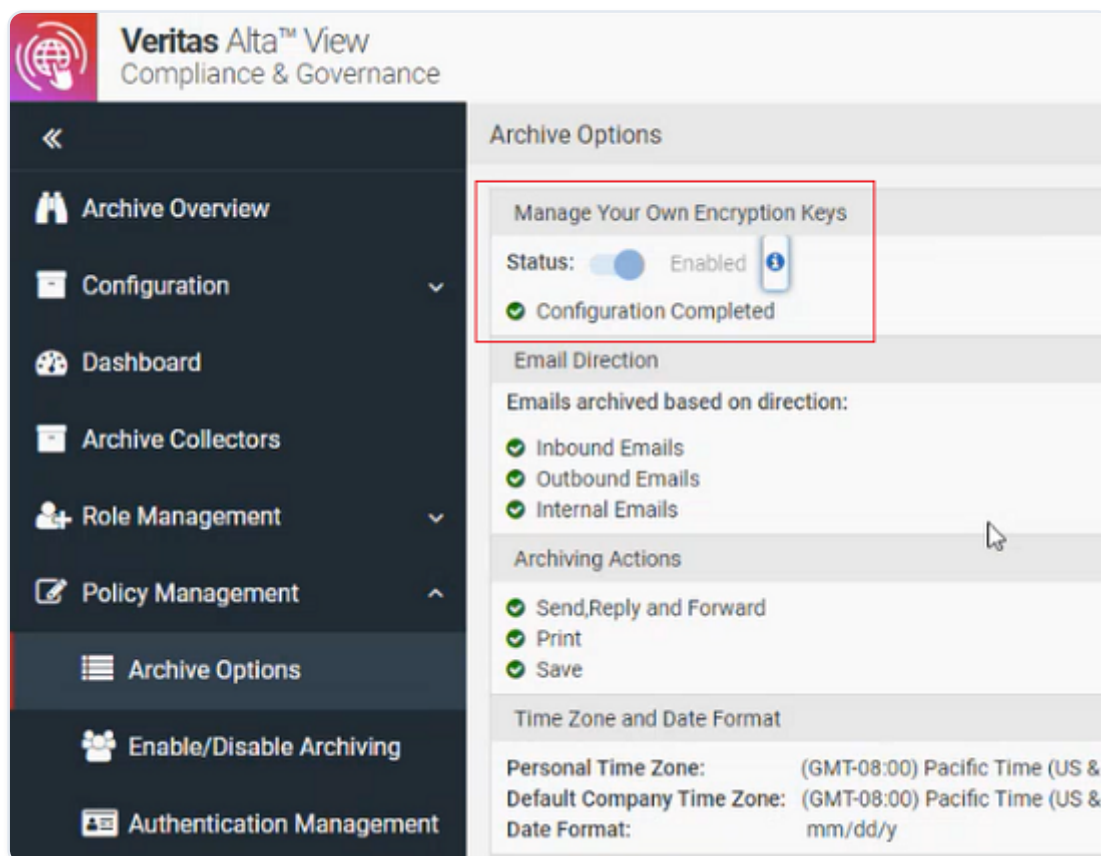
For more technical information refer official Microsoft Documenation on [Configuring cross-tenant customer-managed keys](#).

Skip

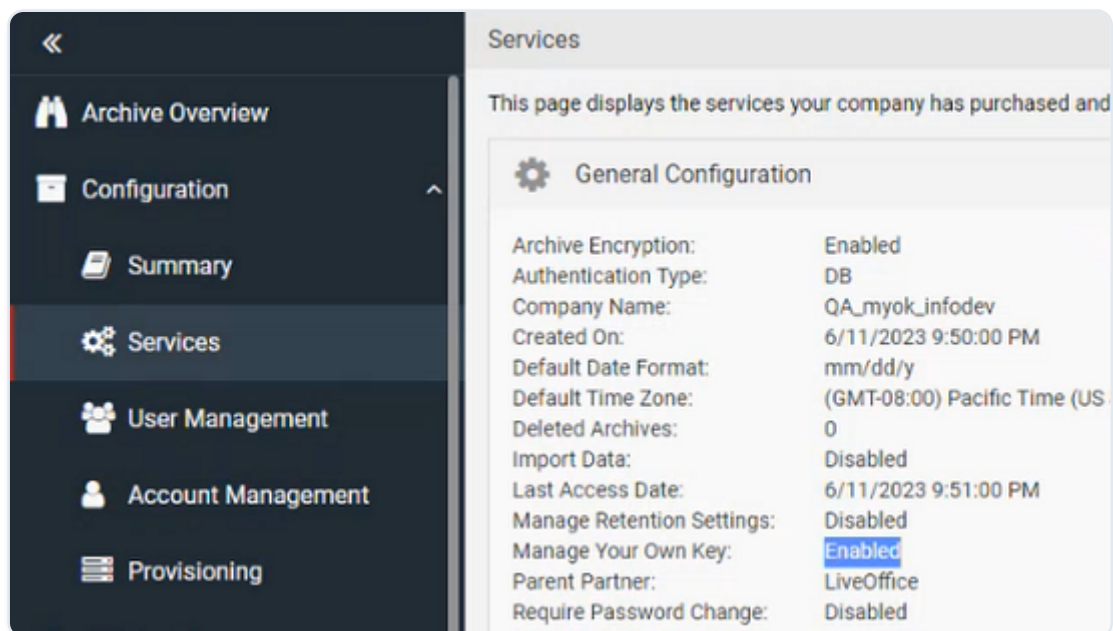
Acknowledge

If you skip to acknowledge, the window reappears again.

- To confirm if the MYOK feature is enabled, in the left navigation pane of the Arctera Insight Management Console, do any of the following:
 - Select **Policy Management > Archive Options**, and ensure that under the **Manage Your Own Keys** section, the status is set to *Enabled*.



- Select **Configuration>Services**, and ensure that under the **General Configuration** section, the **Manage Your Own Keys** status is set to *Enabled*.



Configuring the indexing languages for the new customer

For new customers you must configure the languages for which Arctera Insight Archiving performs indexing.

“ ”

Note: You must perform this procedure even if the customer requires no additional indexing languages.

“ ”

By default, Arctera Insight Archiving performs indexing in English only. Indexing can be configured for additional languages to enable Insight eDiscovery, Insight Personal Archive, and Mobile Web Access to more fully support searches in those languages.

Additional language indexing is currently available for Japanese. Japanese indexing uses a Japanese language analyzer, which provides better search results for different Japanese scripts.

“ ”

Note: The indexing languages are set on the first occasion that you save the settings on the Archiving Options tab of the new customer's details. You cannot change the indexing languages from the Management Console once the first Save has been performed. After the first Save, any changes to this option require assistance from the Arctera Insight Archiving Operations team.

“ ”

To set the indexing languages for a new customer

1. In the left navigation pane of Archive Administration Console, select **Customer Service > Customers**.
2. Select the customer for which you want to configure indexing languages.

By default, the Company Details tab is displayed.

1. Select the Archiving Options tab, under the Indexing Options section, select the languages you need.

Perform indexing in English only, or English and an additional language, to support searches in English and an additional language if selected.

“ ”

Note: Adding indexing languages can affect search results. You cannot easily remove an additional language once you have added it.

“ ”

1. Click **Save** to commit the language options to Arctera Insight Archiving. You must perform this step to set the English indexing option, even if you selected no additional indexing languages.

The Indexing options are now set and cannot be changed from the Management Console. You can continue to set the other options on the Archiving Options page.

See [Configuring the archiving options for a new customer](#).

Configuring the archiving options for a new customer

You can view the new customer's details from the Customers page, and modify the options on the Archiving Options tab as required.

“ ”

Note: The customer administrator can also configure some of these options from the Archive Administration component of the Arctera Insight Management Console.

“ ”

To configure the archiving options for a new customer

1. If you are not already on the Customer Service > Customers > Company Details page for the new customer, do as follows:
 - In the left navigation pane of Customer Service click **Customers**.
 - Select the new customer from the customer list, to display the Company Details page.
2. From the list of tabs along the top of the main pane, select the Archiving Options tab.
3. Edit the customer's archiving options as required.

“ ”

****Note:**** Some options are displayed or editable only if the customer is configured to use the related primary or secondary services. **Archiving Options** : These options let you configure some properties that relate to the customer's archive. Some of the options are hidden if the company has not purchased the associated feature.

“ ”

ENABLE SEND/REPLY/FORWARD	DETERMINES WHETHER USERS CAN SEND, REPLY, AND FORWARD EMAILS FROM WITHIN THE ARCHIVE.
Archive BlackBerry Messages	Determines whether messages from BlackBerry devices are archived, and whether to archive the messages individually or to a centralized mailbox.
Centralized Mailbox Name	If you chose to archive BlackBerry messages to a centralized mailbox, the mailbox name must be specified here.
EC Indicator Active	Determines whether the optional Email Continuity service is enabled.
Number of days to store Email	This setting is associated with the optional Arctera Insight Archiving Email Continuity service. For most customers this value should be set to 0, which sets an unlimited period. If the service is enabled, then by default it saves 7 days of historical emails. You can use this setting to change the number of days for which email can be searched for within the archive.
	Note: This setting does not constitute a retention policy. Items are not deleted after this period.
Is Account Auto Generated	If this setting is enabled, Arctera Insight Archiving creates archive accounts automatically for any accounts that have not

ENABLE SEND/REPLY/FORWARD	DETERMINES WHETHER USERS CAN SEND, REPLY, AND FORWARD EMAILS FROM WITHIN THE ARCHIVE.
	been added to the system. For example, if Arctera Insight Archiving encounters a journaled message that contains an address with the company's domain name but without an archive account, such as a proxy address, it automatically creates an archive account for that address.
	Enablement of this setting can result in a very large number of unwanted archive accounts for aliases and distribution groups.
	Note: This setting is disabled by default, and under most circumstances it should never be enabled. Enablement requires the client's written authorization, with an acknowledgement of the implications of this option relating to the billing for additional accounts.

INCLUDE INBOUND EMAILS	ARCHIVE THE EMAIL MESSAGES THAT ARE SENT TO EMAIL ADDRESSES WITHIN THE CUSTOMER DOMAIN FROM OUTSIDE THE DOMAIN.
Include Outbound Emails	Archive the email messages that are sent to email addresses outside the customer domain from inside the domain.
Include Internal Emails	Archive the email messages that are sent between email addresses within the customer domain.

Exclusion Options : These options let you choose whether to archive items for everyone, or to specify a list of users to archive or to exclude.

ARCHIVE EMAILS FOR ALL USERS	ARCTERA INSIGHT ARCHIVING ATTEMPTS TO ARCHIVE ALL OF THE ITEMS THAT IT RECEIVES.
Archive emails for all users, except anyone listed below	If you select this option you must enter the email addresses of any users for which Arctera Insight Archiving is not to archive messages.
Archive emails for the users listed below	If you select this option you must enter the email addresses of any users for which Arctera Insight Archiving is to archive messages.

Active Folder Synchronization : This option lets you enable or disable the synchronization of mailbox folders between Outlook and Arctera Insight Archiving.

“ ”

Note: This option requires the ArchiveTools Folder Sync application. The option is available only if the customer subscribes to the Folder Sync service and has the Folder Sync application configured.

“ ”

STATUS	ENABLED/DISABLED
Number of users Synchronizing	For information only: The number of mailboxes that Folder Sync is currently synchronizing.
Last Synchronized	For information only: The date and time that Folder Sync last performed a folder synchronization.

Alternate Indexing Options : These options control how Arctera Insight Archiving indexes archived items, which can affect search results.

ENABLE NATIVE SEARCH IN ALTERNATE LANGUAGES	THIS OPTION DETERMINES THE LANGUAGES IN ADDITION TO ENGLISH FOR WHICH ARCTERA INSIGHT ARCHIVING PERFORMS INDEXING.
	NOTE: AFTER THE INITIAL CONFIGURATION OF THIS OPTION, ANY CHANGES REQUIRE THE ASSISTANCE OF THE ARCTERA INSIGHT ARCHIVING OPERATIONS TEAM.
	SEE CONFIGURING THE INDEXING LANGUAGES FOR THE NEW CUSTOMER .

1. Click **Save** if you made any changes.

Obtaining the credentials of a customer's primary administrator account

You must obtain the details of the new customer's primary administrator account for your records. This information is required for the customer's welcome letter email.

To obtain the credentials of the customer's primary administrator account

1. In the left navigation pane of Archive Administration Console, select **Customer Service>Customers**.

Select the required customer from the customer list, to display the Company Details page.

See [Finding a customer in the customer list](#).

1. At the bottom of the Company Details section, click **Admin Account Details**.
2. The Admin Account Details dialog displays the email address and user name of the primary administrator. Make a note of these.
3. To obtain the password you must make the Arctera Insight Management Console reset it. Click **Reset Built-In Administrator Password**.
4. Make a note of the reset password that the dialog displays.

“ ”

Note: This password is temporary only. The primary administrator is forced to reset this password immediately after logging in with it.

“ ”

5. If you want to send a copy of the temporary password to your own account's email address, click **Send password to my e-mail account**.
6. Click **Close** to close the Admin Account Details dialog.
7. Log out of the Arctera Insight Management Console and log in again with the customer's primary administrator account and the new temporary password.
8. When you are prompted, reset the primary administrator account password to a value of your choosing.

About creating additional administrator accounts for a customer

The primary administrator account should be regarded as a service account that is not used for daily administration tasks. The account is normally hidden from view in the Accounts tab in Archive Administration, and as such it cannot be given additional administrator roles. For example, the primary administrator account cannot be given the Discovery Administrator role in Archive Administration, so it cannot access the E-Discovery tab in Insight eDiscovery.

You may want to assist the client in creating another administrator account for them to use in their production environment.

Creating and updating archive accounts in bulk from a user upload list

If the client has provided a user upload list, you can use the list to perform the bulk creation or modification of archive accounts for the client.

See [Arctera Insight Archiving customer provisioning prerequisites](#).

“ ”

Note: For Google G Suite Gmail customers, you can take a CSV file of Google users that the customer has downloaded from the Google Admin console and convert it to a format that is

suitable for use in this procedure. See [Creating Google G Suite Gmail archive accounts in bulk from a downloaded Google user list](#).



The user upload list may contain new users and existing users. The list is processed as follows:

- For each listed user an archive account is created if one does not exist. If the archive account already exists, its details are updated if the list specifies any different information.
- Archive accounts for unlisted users remain unchanged.
- The primary administrator account and the unassigned legacy account are never modified.

Newly provisioned users must reset their password or have it reset for them, before they can access Arctera Insight Archiving. More details are given at the end of the following procedure.

To create and update archive accounts in bulk from a client's user upload list

1. Review the user upload list, to ensure that the columns have been completed correctly. In particular, note the following:
 - A First Name is required for all general email accounts. The first name is a required field for resetting a user's password.
 - The Primary Email and User Name columns should have the same content for each user.
 - Any Domain Name included in the user upload list must be configured in the Domains section of the customer's company details before you proceed. Otherwise the creation of the related accounts fails.
 - Ensure that the Aliases column does not include the Primary Email and User Name address.
2. In the left navigation pane of Archive Administration Console, select **Customer Service>Customers**. Then select the required customer from the customer list, to display the Company Details page.

See [Finding a customer in the customer list](#).

1. From the list of tabs along the top of the main pane, click the Accounts tab.
2. Click **Import**.
3. In the Account Import dialog box, click **Browse**, and browse to the location of the client's user upload list file. Then select the file from its location and click **Import**.

4. The dialog box displays the results of the completed import including user names, account status, and details of the upload status such as Account successfully added.

Before you close the Account Import dialog box, click **Export to Excel** if you want to capture the information to an Excel spreadsheet.

1. Close the Account Import dialog box.

The newly imported accounts now appear in the list of accounts on the Accounts tab.

Note that the customer's unassigned legacy account and primary administrator account are not shown on the Accounts tab.

1. For each new account in the Accounts tab, check that any user alias email addresses are correct. If the alias email addresses are not entered for an account, any messages that are sent or received for those addresses go to the Unassigned Legacy account. Email reassignments to the correct archive accounts must be run manually by the Arctera Insight Archiving data management team.
2. The passwords for any newly provisioned users must be reset before the users can access Arctera Insight Archiving. Users can select the **Forgot Password** link on the Arctera Insight Archiving login page to request a temporary password, which is sent to their primary email address. Alternatively, an administrator can assign a password to the user's archive account as follows:
 - Log on to the Arctera Insight Management Console with the credentials of the customer's primary administrator.
 - In Archive Administration, select **Account Management**.
 - Select the user account.
 - On the Edit Account dialog, enter a new password.

Creating Google G Suite Gmail archive accounts in bulk from a downloaded Google user list

You can provision Google G Suite Enterprise edition Gmail archive accounts in bulk for a client, using a variation of the standard bulk archive account creation process. You can take a CSV file of Google users that the client has downloaded from the Google Admin console and convert it to a format that is suitable for use in the bulk import process.

[Table: Steps to create Google G Suite Gmail archive accounts in bulk](#) lists the steps you need to follow.

Table: Steps to create Google G Suite Gmail archive accounts in bulk

STEP	ACTION	REFERENCE
Step 1	Get the client to export a list of users in CSV format from G Suite, and provide the list to Arctera.	See Downloading a list of users from the Google Admin console .
Step 2	Run the Google user account CSV file converter tool to convert the list into a format that we can use in the import process.	See Converting a Google user list CSV file to the required format for the bulk import process .
Step 3	Use the Import feature of the Customer Service tool to create the archive account for each user in the converted list.	See Creating and updating archive accounts in bulk from a user upload list .

Downloading a list of users from the Google Admin console

Instruct the client to use the following procedure to create a CSV file that lists the users that they want us to provision for them in Arctera Insight Archiving.

“ ”

Note: The import process uses only the first three columns from the output Google CSV file, namely Email address, First name, and Last name.

“ ”

To download a list of users from the Google Admin console

1. Browse to the Google Admin console sign-in page at the following URL:

<https://admin.google.com>

1. Sign in to the Google Admin console with a Google administrator account name and password.

2. On the Google Admin console home page, select **Users**.
3. If necessary, filter the user list by type or organization.
4. At the top of the **Users** page, click the **Settings** icon (three vertical blocks) and choose **Download users**.
5. Choose **Download the filtered list of users** or **Download all users**, as required.
6. Clear the **Create a Google spreadsheet** check box. The import process requires a CSV file.
7. Click **OK** to generate the CSV file.

Converting a Google user list CSV file to the required format for the bulk import process

A CSV file of Google users that has been downloaded from the Google Admin console can be converted to a format that is suitable for use with the bulk user account creation process.

“ ”

Note: This procedure uses the Arctera Insight Archiving Google CSV Converter tool (version 1.0.0.2) to process the Google CSV file.

“ ”

To convert the Google user list CSV file to the required format for the bulk import process

1. Check the contents of the output Google CSV file that the client has supplied. Note the following:
 - The import process uses only the first three columns from the Google CSV file, namely Email address, First name, and Last name. These three columns must be present in the CSV file. The rest of the columns and their content are ignored for the purposes of the conversion.
 - The CSV file name must not contain any special characters.
2. Obtain the Arctera Insight Archiving Google CSV Converter tool, and double-click the file `Google CSV Converter.exe` to start it.

“ ”

Note: For more details of the conversion process, refer to the Transfer of Information (TOI) document that accompanies the converter tool.

“ ”

3. Click **Load File** and select the Google CSV file that you want to convert.

The CSV Input pane then displays the contents of the loaded CSV file.

1. Under Configuration, select the check boxes for the generic archive account configuration options.

“ ”

Note: These options are applied generically for all of the users, but you have the opportunity later in the procedure to edit the values manually for individual users.

“ ”

Choose the generic options as follows:

- Select **Is Archive** to enable archiving to the archive account.
- Select **Personal Archive** to enable login to Insight Personal Archive for the account.
- Under Role, select the role for each archive account. You can choose from **Account**, **Reviewer**, or **Administrator**.
- If you choose **Administrator** as the role, you can optionally select the **View All Accounts** check box, to add the ability to view all accounts.
- If you choose **Administrator** as the role, the **Enter Built-In Privilege** option becomes available. Select this option to specify a built-in privilege for the user, and then select the privilege from the **Built-In Privilege** radio buttons.

1. Click **Convert** to create the initial definition for the output file.

The Preview window shows the current definition for the content of the output file.

1. Examine the values in the Preview window, and if required make any manual changes to the values for any individual users.

“ ”

Note: You can change the generic configuration settings and rerun the Convert if you want, but this action overwrites any manual changes you have made in the Preview window.

“ ”

2. Click **Save** to save the output file content as currently defined in the Preview window.

When you name the output CSV file, do not include any special characters.

1. Close the Google CSV Converter tool.

You can now check the output CSV file, and use it as a user upload list for the bulk creation of users.

See [Creating and updating archive accounts in bulk from a user upload list](#).

Confirming the completion of the new customer order

For production customers you must submit a confirmation when you have completed the ERP order that is associated with the provisioning of the customer.

“ ”

Note: If the order is for both AdvisorMail and Arctera Insight Archiving, you must complete the AdvisorMail part of the order in addition to the Arctera Insight Archiving part, before you perform this confirmation step.

“ ”

To confirm the completion of the new customer order

1. In the left navigation pane of Archive Administration Console, select **Customer Service > Customers**. Then select the required customer from the customer list, to display the Company Details page.

See [Finding a customer in the customer list](#).

1. Select the Transaction ID Confirmation tab in the main pane.
2. Enter the ERP system Transaction ID for the completed customer order.
3. Enter the Arctera Insight Archiving user name for the customer.
4. If the order included AdvisorMail in addition to Arctera Insight Archiving, enter the AdvisorMail user name, otherwise leave the AdvisorMail user name box empty.
5. Click **Submit** to submit the transaction confirmation.

Managing customers

This section includes the following topics:

- [About the Customers page](#)
- [Finding a customer in the customer list](#)
- [Making a customer a favorite in the customer list](#)
- [Accessing customer details](#)
- [About the Customer Details page](#)
- [Disabling or enabling a customer's access to the archive](#)
- [Editing a customer's company details](#)
- [Resetting a customer's primary administrator password](#)
- [Editing a customer's archiving options](#)
- [Viewing and exporting the details of a customer's archive accounts](#)
- [Viewing and editing a customer's onboarding checklist information](#)
- [Configuring trusted networks for a customer](#)
- [Viewing a customer's email retention settings](#)
- [Viewing the mail monitoring details for a customer](#)
- [About configuring Authentication Management for a customer](#)
- [Confirming the completion of a customer order](#)

About the Customers page

The Customers page contains a customer list, which displays summary information for each Arctera Insight Archiving that your company has provisioned.

To display the page, click Customers in the left navigation pane of the Customer Service tool.

The customer list displays the following information for each customer:

- Customer Name
- Email Address
- Parent Partner

- Number of accounts
- Number of Insight Personal Archive users
- Archive size, in MB
- Date when created
- Date when last updated

From the customer list you can view and modify the provisioning settings for any customer in the list.

See [Finding a customer in the customer list](#).

Finding a customer in the customer list

You can use a variety of search and filter options to find a customer in the list of customers on the Customers page:

- See [“To search for a customer in the customer list using a keyword or phrase”](#).
- See [“To search for a customer alphabetically in the customer list ”](#).
- See [“To filter on recently searched customers in the customer list”](#).
- See [“To filter on favorite customers in the customer list”](#).
- See [“To filter the customer list by parent partner”](#).

To search for a customer in the customer list using a keyword or phrase

1. In the Search box above the customer list, type in a word or phrase to search on, and press **Enter** or click the Search icon.

Customer Service performs a search, and then shows all the customers whose search details match the search criteria you entered.

1. To view the details of a customer in the search results, click the required row.

“ ”

Note: To clear the search results, remove the text from the Searchbox, and press Enter.

“ ”

To search for a customer alphabetically in the customer list

1. From the alphabet in the Quick Sort bar, click the letter that matches the initial letter of the customer name.

The customer list then shows all the customers whose initial letter matches the one you selected.

1. To view the details of a customer in the search results, click the required row.



Note: To clear the search results, click **All** in the Quick Sort bar.



To filter on recently searched customers in the customer list

1. Under Custom Filters in the left navigation pane, select **Recent**.
2. Click the Filter icon next to Custom Filters.

The customer list then shows the results of the filter, which filters the last five accounts that you have searched in the **Customers** list.

1. To view the details of a customer in the filtered results, click the required row.



Note: To clear the filter results, ensure **Recent** is highlighted in the **Custom Filters** list, and click the stop filter icon next to the **Custom Filters** heading.



To filter on favorite customers in the customer list

1. Under Custom Filters in the left navigation pane, select **Favorites**.
2. Click the Filter icon next to Custom Filters.

The customer list then shows the results of the filter.

1. To view the details of a customer in the filtered results, click the required row.



Note: To clear the filter results, ensure that **Favorites** is highlighted in the **Custom Filters** list, and click the stop filter icon next to the **Custom Filters** heading.



To filter the customer list by parent partner

1. The Partner Filters area lists the parent partners that are associated with your company. If you want to search for a partner in the list, enter your search criteria in the Partner Filters search box.
2. Under Partner Filters in the left navigation pane, click the name of the parent partner on which you want to filter.
3. Click the Filter icon next to Partner Filters.

The customer list then shows the results of the filter.

1. To view the details of a customer in the filtered results, click the required row.



Note: To clear the filter results, click the stop filter icon next to the **Partner Filters** heading.



Making a customer a favorite in the customer list

You can mark a customer as a favorite in the customer list, to make the customer details quick to select from the list.

To make a customer a favorite in the customer list

- You can add customers as favorites in the customer list in either of the following ways:
 - In the **Select** column of the customer list, select the box for the customer or customers, and then click **Add to Favorites** at the top of the Customers page.

- Or click the row for the required customer in the list. Then on the Customer Details page, click **Add to Favorites** from the button bar at the top of the page. Finally, click **Save** to save the changes.

To remove a customer from the favorites list

- You can remove customers as favorites in the customer list in either of the following ways:
 - In the Select column of the customer list, select the box for the customer or customers, and then click **Remove from Favorites** at the top of the Customers page.
 - Or click the row for the required customer in the list. Then on the Customer Details page, click **Remove from Favorites** from the button bar at the top of the page. Finally, click **Save** to save the changes.

Accessing customer details

As an administrator, you can view and edit customer details.

To access a customer's details

1. In the left navigation pane of Customer Service, click **Customers**.
2. Search for and select the required customer from the displayed customers list.

See [Finding a customer in the customer list](#).

1. Click on the customer entry row in the customer list to view the Customer Details page.

About the Customer Details page

The Customer Details page displays the details for the selected customer. The details are organized on the tabs that are listed across the top of the page.

Table: [Tabs on the Customer Details page](#) describes the contents of each tab.

“ ”

Note: Some of the tabs are hidden if the customer is not configured to use the associated features.

“ ”

Table: Tabs on the Customer Details page

TAB ON CUSTOMER DETAILS PAGE	THIS TAB LETS YOU DO THE FOLLOWING	MORE INFORMATION
Company Details	Disable a customer, which excludes them from the archive and suspends archiving.	See Disabling or enabling a customer's access to the archive .
	View and edit a customer's details including its company settings, selected Arctera Insight Archiving services, registered domains, and journaling addresses.	See Editing a customer's company details .
	Reset the primary administrator password for a customer.	See Resetting a customer's primary administrator password .
Archiving Options	Determine whether users can send, reply, and forward messages from Arctera Insight Archiving.	See Editing a customer's archiving options .
	Specify a list of users to include in or to exclude from archiving.	
	Determine whether inbound, outbound, and internal messages are archived.	
	Enable or disable the synchronization of mailbox folders between Outlook and Arctera Insight Archiving. This option requires ArchiveTools Folder Sync.	
Accounts	View information about the accounts that are assigned to the customer's archive, and	See Viewing and exporting the details of a customer's archive accounts .

TAB ON CUSTOMER DETAILS PAGE	THIS TAB LETS YOU DO THE FOLLOWING	MORE INFORMATION
	output the account details to an .xls file.	
	Create archive accounts from a customer's upload list.	Creating accounts from the upload list is normally done as part of the provisioning process. See Creating and updating archive accounts in bulk from a user upload list .
Onboarding Checklist	View and edit the customer's onboarding checklist information.	See Viewing and editing a customer's onboarding checklist information .
IMAP4/POP3 Accounts	This tab is no longer used.	-
Legacy Import	This tab is not used.	-
Trusted Networks	View, configure, and edit trusted IP address ranges to control from where the customer's users can access the archive.	See Configuring trusted networks for a customer .
Retention	View email retention settings, if the customer has set up email retention policies for their archive.	See Viewing a customer's email retention settings .
Mail Monitoring	Check whether Arctera Insight Archiving currently receives journaling traffic from the customer, and view sample emails.	See Viewing the mail monitoring details for a customer .
Authentication Management	View and configure the Arctera Insight Archiving authentication service settings for the customer.	See About configuring Authentication Management for a customer .
Bulk Import	This tab is no longer used.	-

TAB ON CUSTOMER DETAILS PAGE	THIS TAB LETS YOU DO THE FOLLOWING	MORE INFORMATION
	Note: This tab is visible only if a journal address with the mail server type of Native Domino 8.x is defined in the Journal Addresses section of the Company Detail tab.	
Transaction ID Confirmation	Submit a confirmation when you have completed an order for a customer that was generated through the ERP order system.	See Confirming the completion of a customer order .

Disabling or enabling a customer's access to the archive

You cannot delete a customer from within the Customer Service tool. You can disable a customer. A disabled customer cannot access the archive, and new items for that customer are not stored in the archive. Emails that are already archived remain available for eDiscovery and cannot be deleted.

If you disable a customer, Arctera Insight Archiving makes no permanent deletions to the customer's Arctera Insight Archiving settings or to the customer's existing archived emails. The customer configuration remains unchanged including its domains, journal addresses, and trusted networks.

A disabled customer can be re-enabled at any time.

To disable or enable a customer's access to the archive

1. In the left navigation pane, select **Customer Service > Customers**.
2. Search for and select the required customer from the customer list.

See [Finding a customer in the customer list](#).

1. On the Company Details tab, in the Company Status drop-down list, select **Disable** or **Enable** as required.
2. Click **Save**.

Editing a customer's company details

You can view and edit the details of a customer's company from the Company Details tab of the Customer Details page.

To edit a customer's company details

1. In the left navigation pane, select **Customer Service>Customers**.
2. Search for and select the required customer from the customer list.

See [Finding a customer in the customer list](#).

1. On the Company Details tab, as required update the fields explained in the following section, and click **Save**.

Company Details section

The Company Details section of the Company Details tab shows settings for the company and its archive.

“ ”

Note: Some of these settings cannot be changed.

“ ”

The settings are as follows:

COMPANY NAME	THE CUSTOMER COMPANY NAME.
	NOTE: NEVER CHANGE THE COMPANY NAME UNLESS YOU HAVE THE CLIENT'S REQUEST TO DO SO AND YOU HAVE PROVIDED THE REQUIRED NOTIFICATION TO OTHER INTERNAL TEAMS INCLUDING ORDER SERVICES, BILLING, AND PROVISIONING.
Total Storage Utilized	The amount of storage in gigabyte (GB) utilized by the customer. It includes the data of emails and collaboration messages.

COMPANY NAME	THE CUSTOMER COMPANY NAME.
	NOTE: NEVER CHANGE THE COMPANY NAME UNLESS YOU HAVE THE CLIENT'S REQUEST TO DO SO AND YOU HAVE PROVIDED THE REQUIRED NOTIFICATION TO OTHER INTERNAL TEAMS INCLUDING ORDER SERVICES, BILLING, AND PROVISIONING.
	The subscription renewal team can easily view the current storage utilization by the customer and take billing-specific decisions.
Parent Partner	The company name of the parent partner.
	Note: You cannot change the parent partner for a customer in the Customer Service tool.
Billing Number	The customer's Billing Number, displayed where applicable.
Oracle ID	The customer's Oracle database ID.
	An Oracle ID is now mandatory for all companies. If you edit the details of a company that previously had no Oracle ID assigned, you must assign an Oracle ID before you can save the changes.
	If you enter an Oracle ID that is already assigned to one or more customers, a Confirm dialog shows the details of those assignments. You can then choose whether to continue with the specified Oracle ID.
Manage Retention Settings	Lets the customer access the retention management settings in Archive Administration, to perform retention management for its company.
Created On	The date and time when the customer archive was established.

COMPANY NAME	THE CUSTOMER COMPANY NAME.
	NOTE: NEVER CHANGE THE COMPANY NAME UNLESS YOU HAVE THE CLIENT'S REQUEST TO DO SO AND YOU HAVE PROVIDED THE REQUIRED NOTIFICATION TO OTHER INTERNAL TEAMS INCLUDING ORDER SERVICES, BILLING, AND PROVISIONING.
Updated On	The date and time when the customer archive was last updated.
Last Access Date	The date and time when the customer archive was last accessed.
Default Time Zone	The default time zone for the customer.
Default Date Format	The default date format for the customer.
Admin Account Details	Click the link to view the Admin Account Details dialog. The dialog shows the email address and the user name for the company's primary administrator account.
	From the Admin Account Details dialog you can also reset the primary administrator password if required.
	See Resetting a customer's primary administrator password .

“ ”

Note: To view the Arctera Insight Archiving archive access and management URLs for the customer, click [Archive Access URLs](#) in the button bar at the top of the page.

“ ”

Services section

The Services section of the Company Details tab lists the primary Arctera Insight Archiving services and secondary Arctera Insight Archiving services that are registered for the customer. The section also shows the current number of users for each service.

“ ”

Note: For more information about any service, point to its name in the Product column.

“ ”

The Arctera Insight Archiving Order Services team processes client requests for additional primary services or secondary services, or for an increase the number of accounts.

To add a primary service or secondary service for the customer, select the check box for that service. Then complete any additional information that the Customer Service tool prompts you to provide.

“ ”

Note: The available secondary services depend on which primary services are selected.

“ ”

Primary Services:

PERSONAL ARCHIVE	ALLOWS AN ADMINISTRATOR TO DEPLOY INSIGHT PERSONAL ARCHIVE AND CREATE NEW ARCHIVES.
Insight eDiscovery	Allows an administrator to designate Insight eDiscovery reviewers.
Email Continuity	Lets you configure the Arctera Insight Archiving email continuity feature. If you select this service, the Email Continuity Options section becomes available on the Company Details tab to enable you to configure settings for this feature.

PERSONAL ARCHIVE	ALLOWS AN ADMINISTRATOR TO DEPLOY INSIGHT PERSONAL ARCHIVE AND CREATE NEW ARCHIVES.
	For more information about provisioning the Email Continuity service, see the Arctera Insight Archiving Email Continuity Provisioning Guide , which is available from our internal Support website.
	See Obtaining the customer and partner administration documentation .
-	Allows an administrator to designate reviews.

Secondary Services:

PERSONAL ARCHIVE FOR BLACKBERRY	ENABLES THE SUPPORT FOR THE PERSONAL ARCHIVE FOR BLACKBERRY SERVICE. IF YOU SELECT THIS SERVICE, ADDITIONAL OPTIONS APPEAR IN THE ARCHIVING OPTIONS SECTION OF THE ARCHIVING OPTIONS TAB TO LET YOU CONFIGURE HOW BLACKBERRY MESSAGES ARE ARCHIVED.
Exchange Folder Synchronization	Enables the support for the optional ArchiveTools Folder Sync application. If you select this service, the Active Folder Synchronization options become available on the Archiving Options tab to let you enable or disable Folder Sync.
Exchange Online Folder Synchronization	Exchange Online folder synchronization is an add-on service to personal Archive. Before you select this secondary service, ensure that you have selected the Personal Archive check box under Primary Services . This feature is useful for Exchange Online folder synchronization on cloud.
	Enables you to synchronize mailbox folders natively from the Arctera Insight Management

PERSONAL ARCHIVE FOR BLACKBERRY	ENABLES THE SUPPORT FOR THE PERSONAL ARCHIVE FOR BLACKBERRY SERVICE. IF YOU SELECT THIS SERVICE, ADDITIONAL OPTIONS APPEAR IN THE ARCHIVING OPTIONS SECTION OF THE ARCHIVING OPTIONS TAB TO LET YOU CONFIGURE HOW BLACKBERRY MESSAGES ARE ARCHIVED.
	Console, while the Archive Tool synchronizes on-premise Exchange Online mailbox folders.
SharePoint Archiving	Enables the support for the optional ArchiveTools for SharePoint feature, which lets users of Insight eDiscovery direct SharePoint documents to their archive. This option requires the Insight eDiscovery primary service to be selected.
Salesforce Chatter Archiving	Enables the support for archiving of Salesforce Chatter messages. This option requires the Insight eDiscovery primary service to be selected.
Office 365 Personal Archive Collection	This feature is no longer supported.
Box File Archiving	Enables the support for file archiving from specified Box accounts.
Lync On-Premise Archiving	Enables support for the archiving of conversations from a Microsoft Lync on-premises server, through the Arctera Insight Archiving Lync Connector on-premises application.
	Note: If you select this option then under Journal Addresses you must configure at least one journal address with the mail server type Lync OnPrem.
Alta Classification	Enables support to analyze the emails to assign classification tags.

PERSONAL ARCHIVE FOR BLACKBERRY	ENABLES THE SUPPORT FOR THE PERSONAL ARCHIVE FOR BLACKBERRY SERVICE. IF YOU SELECT THIS SERVICE, ADDITIONAL OPTIONS APPEAR IN THE ARCHIVING OPTIONS SECTION OF THE ARCHIVING OPTIONS TAB TO LET YOU CONFIGURE HOW BLACKBERRY MESSAGES ARE ARCHIVED.
Bloomberg Archiving	Enables support for the archiving of Instant Bloomberg and Bloomberg messages.

Domains section

The Domains section of the Company Details tab contains information about the domains that are specified for the customer's company.

You can add additional domains if required, as follows:

- In the Domain box, type in a domain name, omitting the "www" prefix. The domain name cannot include any special characters.

“ ”

Note: For Google G Suite Gmail archiving, enter the domain name that the customer has registered with Google.

“ ”

- Click Add.
- If you specify more than one domain, choose which domain is the primary domain by selecting the Primary Domain check box next to that domain.

Email Continuity

The Email Continuity section of the Company Details tab contains information about the optional Email Continuity feature, if it is configured. Email Continuity provides a back-up email system if the customer's primary mail server fails.

“ ”

Note: This section appears only if the Email Continuity service was selected for the customer.

“ ”

The Email Continuity section specifies the following information:

- EC Method: The AV/AS provider, which must be selected from the drop-down menu.
- Mail Server: The IP address of the mail server for the continuity service.
- Domain Name: The domain name, which must be specified from the drop-down menu.

Journal Addresses section

The Journal Addresses section of the Company Details tab lists the email addresses that are configured for journaling, and the associated mailbox type. All emails that journal from the customer's servers to these addresses are available to archive, if journaling is configured appropriately. You can specify multiple journal addresses if required.

If you need to add a journal address for the customer, you can do so as follows:

- In the Address box, type in the journal address for the customer, without the "www" prefix. The journal address cannot include any special characters, other than a dash.

Then, from the drop-down menu that is adjacent to the Address box, select the journaling domain. The menu lists any custom journal domains for the partner, its child customers, and child partners.

“ ”

Note: For Google G Suite Gmail journaling, the journal address should match the journal address that you provide to the customer for specifying in the Google Admin console.

“ ”

- In the Mail Server Type box, select the mail server type from the drop-down menu.

“ ”

Note: For Google G Suite Gmail journaling, select Google Journal.

“ ”

- Click Add to add the journal address details.
- To add another journal address, repeat these steps. Bear in mind that customers typically journal to one address only for each mail server type.

Resetting a customer's primary administrator password

You can reset the primary administrator password for a customer, if required. The primary administrator is also known as the built-in administrator.

To reset a customer's primary administrator password

1. In the left navigation pane, select **Customer Service>Customers**.
2. Search for and select the required customer from the customer list.

See [Finding a customer in the customer list](#).

1. On the Company Details tab, click **Admin Account Details**.

The Admin Account Details dialog displays the email address and user name of the primary administrator account.

1. Click **Reset Built-In Administrator Password**.
2. The dialog displays a new temporary password. Make a note of the new password.

“ ”

Note: The user is forced to reset the password immediately after logging in with this new password.

“ ”

3. To send a copy of the new password to your own login email account, click **Send password to my e-mail account**.
4. Click **Close** to close the Admin Account Details dialog.

Editing a customer's archiving options

You can view and edit the archiving options for a customer from the Archiving Options tab of the Customer Details page.

“ ”

Note: Customer administrators can configure some of these options themselves from the Archive Administration component of the Management Console.

“ ”

To edit a customer's archiving options

1. In the left navigation pane, select **Customer Service>Customers**.
2. Search for and select the required customer from the customer list.

See [Finding a customer in the customer list](#).

1. On the Archiving Options tab, modify the options for the customer, as required.

“ ”

****Note:**** Some options are displayed or editable only if the customer is configured to use the related primary or secondary services. **Archiving Options** : These options let you configure some properties that relate to the customer's archive. Some of the options are hidden if the company has not purchased the associated feature.

“ ”

ENABLE SEND/REPLY/FORWARD	DETERMINES WHETHER USERS CAN SEND, REPLY, AND FORWARD EMAILS FROM WITHIN THE ARCHIVE.
Archive BlackBerry Messages	Determines whether messages from BlackBerry devices are archived, and whether to archive the messages individually or to a centralized mailbox.

ENABLE SEND/REPLY/FORWARD	DETERMINES WHETHER USERS CAN SEND, REPLY, AND FORWARD EMAILS FROM WITHIN THE ARCHIVE.
Centralized Mailbox Name	If you chose to archive BlackBerry messages to a centralized mailbox, the mailbox name must be specified here.
EC Indicator Active	Determines whether the optional Email Continuity service is enabled.
Number of days to store Email	This setting is associated with the optional Arctera Insight Archiving Email Continuity service. For most customers this value should be set to 0, which sets an unlimited period. If the service is enabled, then by default it saves 7 days of historical emails. You can use this setting to change the number of days for which email can be searched for within the archive.
	Note: This setting does not constitute a retention policy. Items are not deleted after this period.
Is Account Auto Generated	If this setting is enabled, Arctera Insight Archiving creates archive accounts automatically for any accounts that have not been added to the system. For example, if Arctera Insight Archiving encounters a journaled message that contains an address with the company's domain name but without an archive account, such as a proxy address, it automatically creates an archive account for that address.
	Enablement of this setting can result in a very large number of unwanted archive accounts for aliases and distribution groups.
	Note: This setting is disabled by default, and under most circumstances it should never be enabled. Enablement requires the client's written authorization, with an

acknowledgement of the implications of this option relating to the billing for additional accounts.

INCLUDE INBOUND EMAILS	ARCHIVE THE EMAIL MESSAGES THAT ARE SENT TO EMAIL ADDRESSES WITHIN THE CUSTOMER DOMAIN FROM OUTSIDE THE DOMAIN.
Include Outbound Emails	Archive the email messages that are sent to email addresses outside the customer domain from inside the domain.
Include Internal Emails	Archive the email messages that are sent between email addresses within the customer domain.

Exclusion Options : These options let you choose whether to archive items for everyone, or to specify a list of users to archive or to exclude.

ARCHIVE EMAILS FOR ALL USERS	ARCTERA INSIGHT ARCHIVING ATTEMPTS TO ARCHIVE ALL OF THE ITEMS THAT IT RECEIVES.
Archive emails for all users, except anyone listed below	If you select this option you must enter the email addresses of any users for which Arctera Insight Archiving is not to archive messages.
Archive emails for the users listed below	If you select this option you must enter the email addresses of any users for which Arctera Insight Archiving is to archive messages.

Active Folder Synchronization : This option lets you enable or disable the synchronization of mailbox folders between Outlook and Arctera Insight Archiving.

“ ”

Note: This option requires the ArchiveTools Folder Sync application. The option is available only if the customer subscribes to the Folder Sync service and has the Folder Sync application configured.

“ ”

STATUS	ENABLED/DISABLED
Number of users Synchronizing	For information only: The number of mailboxes that Folder Sync is currently synchronizing.
Last Synchronized	For information only: The date and time that Folder Sync last performed a folder synchronization.

Alternate Indexing Options : These options determine how Arctera Insight Archiving indexes archived items.

ENABLE NATIVE SEARCH IN ALTERNATE LANGUAGES	THIS OPTION DETERMINES THE LANGUAGES IN ADDITION TO ENGLISH FOR WHICH ARCTERA INSIGHT ARCHIVING PERFORMS INDEXING.
	ARCTERA INSIGHT ARCHIVING PERFORMS INDEXING IN ENGLISH BY DEFAULT. INDEXING CAN BE CONFIGURED FOR ADDITIONAL LANGUAGES TO ENABLE THE SEARCH FACILITIES IN INSIGHT EDISCOVERY, INSIGHT PERSONAL ARCHIVE, AND MOBILE WEB ACCESS TO MORE FULLY SUPPORT SEARCHES IN THOSE LANGUAGES.
	ADDITIONAL LANGUAGE INDEXING IS CURRENTLY AVAILABLE FOR JAPANESE. THE INDEXING USES A JAPANESE LANGUAGE ANALYZER, WHICH PROVIDES BETTER SEARCH RESULTS FOR DIFFERENT JAPANESE SCRIPTS.
	NOTE: FOR EXISTING CUSTOMERS ANY CHANGES TO THIS OPTION REQUIRE THE ASSISTANCE OF THE ARCTERA INSIGHT ARCHIVING OPERATIONS TEAM.

1. Click **Save** if you made any changes.

Viewing and exporting the details of a customer's archive accounts

You can view details of the accounts that are assigned to a customer's archive.

You can also export a list containing details of all of the customer's archive accounts to a file in Excel format. The file does not include any password information.

To view the details of a customer's archive accounts

1. In the left navigation pane of Customer Service click **Customers**. Then select the required customer from the customer list, to display the Customer Details page.

See [Finding a customer in the customer list](#).

1. From the list of tabs along the top of the main pane, select the Accounts tab.

The table on this tab lists the details of each archive account including any email aliases, whether the archive is active, and whether Insight Personal Archive access and Insight eDiscovery access are enabled.

To export the details of a customer's archive accounts

1. With the Accounts tab selected on the Customer Details page, click **Export to Excel**.
2. Choose a location for the output file.

Viewing and editing a customer's onboarding checklist information

A potential client is normally required to complete an onboarding checklist questionnaire as a prerequisite to provisioning. The information from this checklist can be recorded in the Arctera Insight Management Console. The answers to the questions help to ensure that the correct settings are configured during the implementation of the archive. You can view or edit the checklist information, for example if you want to record a change in the customer's email environment.

To view or edit a customer's onboarding checklist information

1. In the left navigation pane of Customer Service click **Customers**. Then select the required customer from the customer list, to display the Customer Details page.

See [Finding a customer in the customer list](#).

1. From the list of tabs along the top of the main pane, select the Onboarding Checklist tab.

2. The checklist contains editable fields for each checklist question. Edit the entries, if required.

“ ”

Note: The Journaling Estimator function in step 5 of the checklist no longer works.

“ ”

3. If you make changes to the checklist, click **Save** to save the changes.

Configuring trusted networks for a customer

You can configure trusted IP address ranges for a customer to control from where the customer's users can access the archive.

You can add a new trusted network, or edit or delete the trusted networks that are already defined.

To define a trusted network for a customer

1. In the left navigation pane of Customer Service click **Customers**. Then select the required customer from the customer list, to display the Customer Details page.

See [Finding a customer in the customer list](#).

1. From the list of tabs along the top of the main pane, select the Trusted Networks tab.
2. In Starting and Ending enter the starting and ending IP address for the trusted address range.
3. Select the check boxes to indicate whether the IP address range has access to Manage (the Arctera Insight Archiving Arctera Insight Management Console), and to Personal Archive and Discovery Archive.
4. Click **Add**.
5. When you have finished making changes on the Trusted Networks, click **Save**.

To view, edit, or delete a trusted network for a customer

1. In the left navigation pane of Customer Service click **Customers**. Then select the required customer from the customer list, to display the Customer Details page.

See [Finding a customer in the customer list](#).

1. From the list of tabs along the top of the main pane, select the Trusted Networks tab.

The table lists the specified trusted networks.

1. In the table of trusted networks, click **Edit** or **Delete** for the appropriate network, if required.
2. If you clicked **Edit**, make the required changes to the entry and click **Update**.
3. When you have finished making changes on the Trusted Networks tab, click **Save**.

Viewing a customer's email retention settings

If your customer has set up email retention policies for their archive, you can view the retention settings from the Retention tab of the customer's details.

“ ”

Note: The **Retention** tab is displayed only if the **Manage Retention Settings** check box is selected on the **Company Details** tab.

“ ”

To view a customer's email retention settings

1. In the left navigation pane, select **Customer Service > Customers**.
2. Search for and select the customer for which you want to configure email retention settings.

See [Finding a customer in the customer list](#).

1. From the list of tabs along the top of the main pane, select the **Retention** tab.

The **Retention** tab displays information about the retention settings in the following sections:

- **Default Retention Period:** The minimum number of days that items are retained in the archive.
- **Storage Expiry:** The current storage expiry setting.
- **Retention Policies:** A list of the customer's existing retention policies, which you can sort and search on.

Viewing the mail monitoring details for a customer

The **Mail Monitoring** page of a customer's details enables you to check the current status of journaling traffic for the customer, and to view sample emails.

To view the mail monitoring details for a customer

1. In the left navigation pane of Customer Service click **Customers**. Then select the required customer from the customer list, to display the Customer Details page.

See [Finding a customer in the customer list](#).

1. From the list of tabs along the top of the main pane, select the Mail Monitoring tab.

The Hourly Mail Volume chart and table indicate the quantity of mail that Arctera Insight Archiving received during each hour, within the last few hours.

The Today's Sample Emails table lists the sample emails for examination.

About configuring Authentication Management for a customer

The Authentication Management page of a customer's details lets you view and configure the Arctera Insight Archiving authentication service settings for the customer.

For more information about authentication management, see the Arctera Insight Archiving [Authentication Management Guide](#), which is included in the Arctera Insight Management Console Help.

Confirming the completion of a customer order

You must submit a confirmation when you have completed an order for the customer that was generated through the ERP order system.

“ ”

Note: If the order is for both AdvisorMail and Arctera Insight Archiving, you must complete the AdvisorMail part of the order in addition to the Arctera Insight Archiving part, before you perform the confirmation step.

“ ”

To confirm the completion of a customer order

1. In the left navigation pane of Customer Service select the **Customers** node. Then select the required customer from the customer list, to display the Customer Details page.

See [Finding a customer in the customer list](#).

1. Select the Transaction ID Confirmation tab in the main pane.
2. Enter the ERP system Transaction ID for the completed customer order.
3. Enter the Arctera Insight Archiving user name for the customer.
4. If the order included AdvisorMail in addition to Arctera Insight Archiving, enter the AdvisorMail user name, otherwise leave the AdvisorMail user name box empty.
5. Click **Submit** to submit the transaction confirmation.

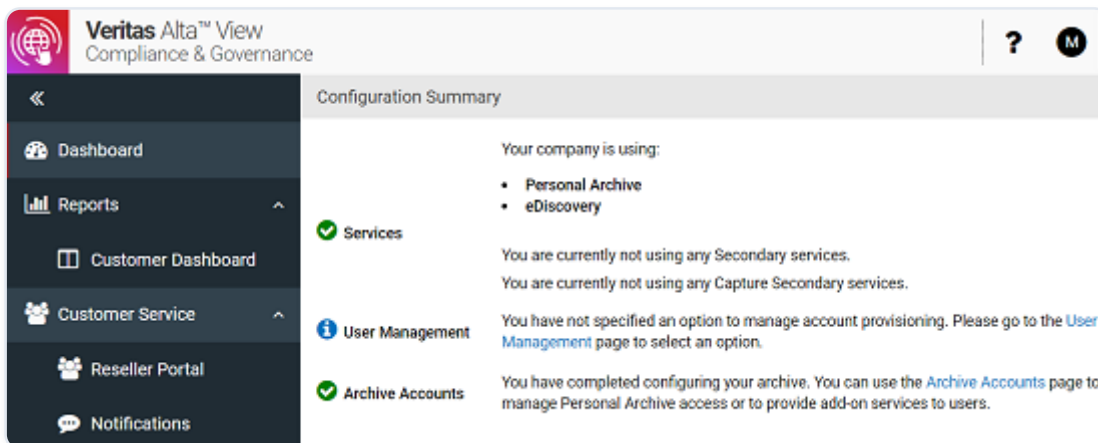
Reseller portal

This section includes the following topics:

- [About reseller portal](#)
- [Viewing reseller details](#)
- [Generating billing report](#)

About reseller portal

The reseller portal is accessible to both Arctera Insight Archiving administrators and resellers. Administrators have the privilege to view reseller details and generate billing reports for the resellers. On the other hand, resellers have restricted access to the Customer Services tool. When resellers log in using their reseller user accounts, they can view the portal interface similar to the sample image provided below.



Viewing reseller details

To view reseller details

1. In the left navigation pane, select **Customer Service>Reseller Portal**.

The **Reseller Portal View** page provides you with the following details of resellers:

COLUMN HEADING	DESCRIPTION
Customer Name	Lets you view customer name.

COLUMN HEADING	DESCRIPTION
Last Login	Lets you view the date of the last login to the services by the customers. This information provides the date when the customers most recently accessed or logged in to the provided services.
Admin Contact	Lets you view the contact email address of the administrator from customers side. This email address serves as the point of contact for administrative purposes and communication related to the customer accounts or services.
Primary Usage	Lets you view the percentage of primary services usage by the customer.
Secondary Usage	Lets you view the percentage of secondary services usage by the customer.
Storage Allocation(GB)	Lets you view the storage space (in GB) allocated to customer.
Storage Usage	Lets you view the ratio of allocated to utilized storage by customer.
Storage Overage(GB)	Lets you view additional storage space (in GB) utilized beyond allocated space by customers for data storage.
Transcription Allocation(GB)	Lets you view the space (in GB) allocated to customers for transcription-specific services.
Transcription Usage	Lets you view the space (in GB) actually utilized by customers for transcription-specific services.
Transcription Overage(GB)	Lets you view additional storage space (in GB) utilized beyond allocated space by customers for transcription services.
Renewal Date	Lets you view the Zuora subscription expiration date if the Zuora subscription service is

COLUMN HEADING	DESCRIPTION
	enabled for customers. If the service is disabled, this field remains blank.
PA Quota	Lets you know number of Alta Personal Archive licenses allocated to a customer.
\# of PA Accounts	Lets you know number of Alta Personal Archive accounts used by a customer.
PA % Used	Lets you know percentage of Alta Personal Archive licenses utilized by a customer.
Personal Archive Last Accessed	Lets you know the last access date of Personal Archive within the past six months.
eDiscovery Quota	Lets you know number of Alta eDiscovery licenses allocated to a customer.
\# of eDiscovery Accounts	Lets you know number of Alta eDiscovery accounts used by a customer.
eDiscovery % Used	Lets you know percentage of Alta eDiscovery licenses utilized by a customer.
eDiscovery Last Accessed	Lets you know the last access date of Insight eDiscovery within the past six months
EC Quota	Lets you know number of Email Continuity licenses allocated to a customer.
\# of EC Accounts	Lets you know number of Email Continuity accounts used by a customer.
EC % Used	Lets you know percentage of Email Continuity licenses utilized by a customer.
Surveillance Quota	Lets you know number of Alta Surveillance licenses allocated to a customer.
\# of Surveillance Accounts	Lets you know number of Alta Surveillance accounts used by a customer.

COLUMN HEADING	DESCRIPTION
Surveillance % Used	Lets you know percentage of Alta Surveillance licenses utilized by a customer.
Surveillance Last Accessed	Lets you know the last access date of Alta Surveillance within the past six months
Last Journal	Lets you know when was the journal feed last active.
Usage Over Time	Lets you view user account wise usage overage of services.
	To access this report, locate the Usage Over Time column in the corresponding row and click Show Report link. Specify the duration and interval, then click Apply . This report is identical to the Service Usage Report > User Statistics Report .
User List	Lets you export the latest user list per customer.
	To access a list of users and their details, locate the User List column in the corresponding row and click Export .
Usage Notification Enabled	When your user account is enabled for usage notification, this field allows you to see a list of redacted email addresses for sending overage notification emails. Notifications are not sent to users with the user notification option disabled.
	Note: Only administrators have permission to enable usage notification for other user accounts.
	To access a list of email addresses for sending the overage notification emails, locate the Usage Notification Enabled column in the corresponding row and click Show Emails link.

COLUMN HEADING	DESCRIPTION
Capacity Trend Report	Presents data for each user account, showing their allocated and utilized storage capacity for a specified duration.
	This report helps in gauging proximity to licensed and utilized storage limits to proactively decide on acquiring extra storage or receiving advance notifications to prevent overage charges.
	To access a report for a specific user account, locate the Capacity Trend Report column in the corresponding row and click Show Report link. Specify the duration and interval, then click Apply .
Transcription Trend Report	Presents data for each user account, showing their allocated and utilized transcription service for a specified duration.
	This report helps in gauging proximity to licensed and utilized transcription service limits to proactively decide on acquiring extra storage or receiving advance notifications to prevent overage charges.
	To access a report for a specific user account, locate the Transcription Trend Report column in the corresponding row and click Show Report link. Specify the duration and interval, then click Apply .

1. By default, the application displays a fewer columns. To view additional columns and access more details on the page, do the following:

- Click the **Column** icon in the top-right corner of the page as shown in the sample image below.

Reseller Portal View

Search... [Billing Report](#)

Customer Name	Primary Usage	Secondary Usage	Storage Usage	Renewal Date	Last Login	Admin Contact	
5479_Other_VAS_DA_migrat...	233%				n/a	admin@liveoffice.com	
5479_unlimit_Standalone_N...	245%				n/a	admin@liveoffice.com	
5479_unlimit_Suite_Migrated	338%				n/a	admin@liveoffice.com	
5479_unlimit_Suite_New	338%				n/a	admin@liveoffice.com	
5479_unlimit_VAS_DA_Migra...	188%				n/a	admin@liveoffice.com	
5p	2%				n/a	admin@liveoffice.com	

- Select the column you want to see on page and click **Apply** as shown in the sample image below.

☐ PA Quota
☐ # of PA Accounts
☐ PA % Used
☒ eDiscovery Quota
☐ # of eDiscovery Accounts
☐ eDiscovery % Used
☒ EC Quota
☐ # of EC Accounts
☒ EC % Used
☐ Surveillance Quota
☐ # of Surveillance Accounts
☐ Surveillance % Used
☐ eDiscovery Last Accessed
☐ Surveillance Last Accessed
☐ Personal Archive Last Accessed
☐ Last Journal
☐ Usage over Time
☐ User List
☐ Usage Notifications Enabled

Apply

2. To search for and select the reseller to view its details, perform any of the following steps:

- Use navigation arrows at the bottom of the page for easy access to the first, previous, next, and last pages.
- To find the required reseller, in the **Search** field, enter the keywords that characterize the reseller name that you want to search for, and then press ENTER on a keyboard or click the **Search** icon.

Generating billing report

To generate a billing report

1. In the left navigation pane, select **Customer Service>Reseller Portal**.

A list of available resellers appears.

1. On the **Reseller Portal Viewpage**, click **Billing Report**.

The application generates a reseller wise one day service usage report as on previous date as shown in the sample image below.

One Day Service Usage Report

Choose a date: 3/12/2023

Note: The data in this report can take up to 24 hours to refresh.

Billing Report Date: 12.03.23

Customer Name	PA Quota	PA Usage	PA % Used	eDiscover Quota	eDiscover Usage	eDiscover % Used	EC Quota	EC Usage	EC % Used	FS Quota	FS Usage	FS % Used	Surveillance Quota	Surveillance Usage	Surveillance % Used
LiveOffice	0	457	0%	0	15	0%	0	0	0%	0	0	0%	0	64	0%
QA_QA/RTOffice365	5	9	100%	5	10	200%	5	9	100%	5	0	0%	3	25	833%
QA_AutoIndexing	0	20	0%	0	20	0%	0	0	0%	0	0	0%	0	0	0%
QA_Netix001	100	36	36%	100	38	38%	0	0	0%	0	0	0%	0	0	0%
QA_AutoManageRegres	5	35	700%	5	0	0%	5	35	700%	5	0	0%	0	0	0%

Items per page: 5 1 - 5 of 919

1. To get the one-day service usage report, click the **Calendar** icon, and select the date. Then, click **Apply**.
2. Click the **Download** icon to download this report.

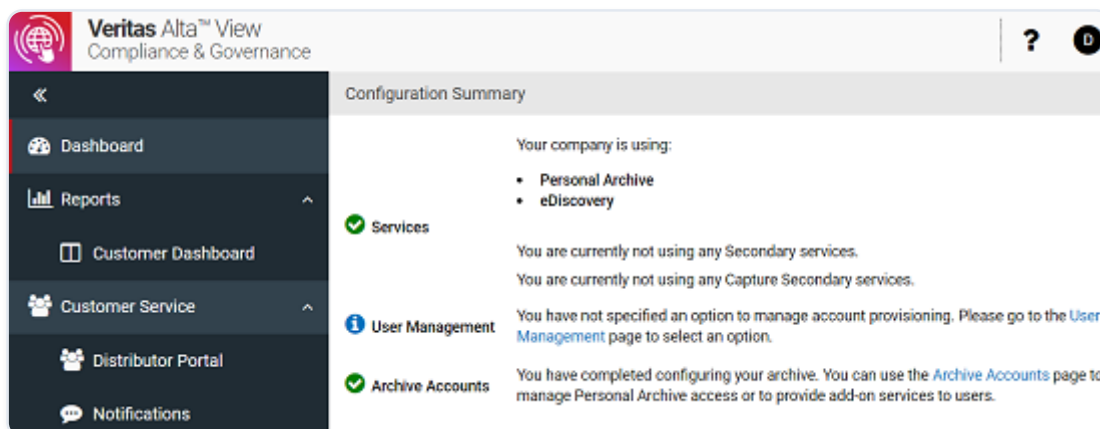
Distributor portal

This section includes the following topics:

- [About distributor portal](#)
- [Viewing distributor details](#)
- [Generating billing report](#)

About distributor portal

The distributor portal is accessible to both Arctera Insight Archiving administrators and distributor. Administrators have the privilege to view distributor details and generate billing reports for the distributors. On the other hand, distributors have restricted access to the Customer Services tool. When distributors log in using their reseller user accounts, they can view the portal interface similar to the sample image provided below.



Viewing distributor details

To view distributor details

1. In the left navigation pane, select **Customer Service>Distributor Portal**.

The **Distributor Portal View** page provides you with the following details of distributors:

COLUMN HEADING	DESCRIPTION
Customer Name	Lets you view customer name.

COLUMN HEADING	DESCRIPTION
Reseller Name	Lets you view the name of the reseller associated with the customer.
Last Login	Lets you view the date of the last login to the services by the customers. This information provides the date when the customers most recently accessed or logged in to the provided services.
Admin Contact	Lets you view the contact email address of the administrator from customers side. This email address serves as the point of contact for administrative purposes and communication related to the customer accounts or services.
Primary Usage	Lets you view the percentage of primary services usage by the customer.
Secondary Usage	Lets you view the percentage of secondary services usage by the customer.
Storage Allocation(GB)	Lets you view the storage space (in GB) allocated to customer.
Storage Usage	Lets you view the ratio of allocated to utilized storage by customer.
Storage Overage(GB)	Lets you view additional storage space (in GB) utilized beyond allocated space by customers for data storage.
Transcription Allocation(GB)	Lets you view the space (in GB) allocated to customers for transcription-specific services.
Transcription Usage	Lets you view the space (in GB) actually utilized by customers for transcription-specific services.
Transcription Overage(GB)	Lets you view additional storage space (in GB) utilized beyond allocated space by customers for transcription services.

COLUMN HEADING	DESCRIPTION
Renewal Date	Lets you view the Zuora subscription expiration date if the Zuora subscription service is enabled for customers. If the service is disabled, this field remains blank.
PA Quota	Lets you know number of Alta Personal Archive licenses allocated to a customer.
\# of PA Accounts	Lets you know number of Alta Personal Archive accounts used by a customer.
PA % Used	Lets you know percentage of Alta Personal Archive licenses utilized by a customer.
Personal Archive Last Accessed	Lets you know the last access date of Personal Archive within the past six months.
eDiscovery Quota	Lets you know number of Alta eDiscovery licenses allocated to a customer.
\# of eDiscovery Accounts	Lets you know number of Alta eDiscovery accounts used by a customer.
eDiscovery % Used	Lets you know percentage of Alta eDiscovery licenses utilized by a customer.
eDiscovery Last Accessed	Lets you know the last access date of Insight eDiscovery within the past six months
EC Quota	Lets you know number of Email Continuity licenses allocated to a customer.
\# of EC Accounts	Lets you know number of Email Continuity accounts used by a customer.
EC % Used	Lets you know percentage of Email Continuity licenses utilized by a customer.
Surveillance Quota	Lets you know number of Alta Surveillance licenses allocated to a customer.

COLUMN HEADING	DESCRIPTION
\# of Surveillance Accounts	Lets you know number of Alta Surveillance accounts used by a customer.
Surveillance % Used	Lets you know percentage of Alta Surveillance licenses utilized by a customer.
Surveillance Last Accessed	Lets you know the last access date of Alta Surveillance within the past six months
Last Journal	Lets you know when was the journal feed last active.
Usage Over Time	Lets you view user account wise usage overage of services.
	To access this report, locate the Usage Over Time column in the corresponding row and click Show Report link. Specify the duration and interval, then click Apply . This report is identical to the Service Usage Report > User Statistics Report .
User List	Lets you export the latest user list per customer.
	To access a list of users and their details, locate the User List column in the corresponding row and click Export .
Usage Notification Enabled	When your user account is enabled for usage notification, this field allows you to see a list of redacted email addresses for sending overage notification emails. Notifications are not sent to users with the user notification option disabled.
	Note: Only administrators have permission to enable usage notification for other user accounts.
	To access a list of email addresses for sending the overage notification emails, locate the

COLUMN HEADING	DESCRIPTION
	Usage Notification Enabled column in the corresponding row and click Show Emails link.
Capacity Trend Report	Presents data for each user account, showing their allocated and utilized storage capacity for a specified duration.
	This report helps in gauging proximity to licensed and utilized storage limits to proactively decide on acquiring extra storage or receiving advance notifications to prevent overage charges.
	To access a report for a specific user account, locate the Capacity Trend Report column in the corresponding row and click Show Report link. Specify the duration and interval, then click Apply .
Transcription Trend Report	Presents data for each user account, showing their allocated and utilized transcription service for a specified duration.
	This report helps in gauging proximity to licensed and utilized transcription service limits to proactively decide on acquiring extra storage or receiving advance notifications to prevent overage charges.
	To access a report for a specific user account, locate the Transcription Trend Report column in the corresponding row and click Show Report link. Specify the duration and interval, then click Apply .

- By default, the application displays a fewer columns. To view additional columns and access more details on the page, do the following:
 - Click the **Column** icon in the top-right corner of the page as shown in the sample image below.

Distributor Portal View

Search... [Billing Report](#)

Customer Name	Reseller Name	Primary Usage	Secondary Usage	Storage Usage	Renewal Date	Last Login
0_level3_partner	B_Level2_Partner	0%				n/a
001testdh1	Test123456mm	9%				n/a
002testdh	Test123456mm	0%				n/a
aa-partner3	Aa_partner	0%				n/a
add_view_cust_priv_only	Test123456mm	0%				n/a
addPat	Test123456mm	0%				n/a
adfs_test_new_sl	Test123456mm	29%				n/a
adfs-auth	Test123456mm	50%				n/a
adfstest_auth	Test123456mm	0%				4 months ago
Admin_Ar_01	Test123456mm	0%				n/a

Filters

- Select the column you want to see on page and click **Apply** as shown in the sample image below.

☐ PA Quota
☐ # of PA Accounts
☐ PA % Used
☒ eDiscovery Quota
☐ # of eDiscovery Accounts
☐ eDiscovery % Used
☒ EC Quota
☐ # of EC Accounts
☒ EC % Used
☐ Surveillance Quota
☐ # of Surveillance Accounts
☐ Surveillance % Used
☐ eDiscovery Last Accessed
☐ Surveillance Last Accessed
☐ Personal Archive Last Accessed
☐ Last Journal
☐ Usage over Time
☐ User List
☐ Usage Notifications Enabled

Apply

- To search for and select the distributor, perform any of the following steps:
 - Use navigation arrows at the bottom of the page for easy access to the first, previous, next, and last pages.
 - To find the required distributor, in the **Search** field, enter the keywords that characterize the distributor name that you want to search for, and then press ENTER on a keyboard or click the **Search** icon.
- To view the details of specific resellers, expand the **Filter by resellers** section located near the navigation pane, and select the required resellers as shown in the sample image below.

Distributor Portal View

Filter By Resellers

- ☐ Select All
- ☒ B_Level2_Partner
- ☐ 050320119domain
- ☒ Test123456mm
- ☐ QA_ARCHIVERS_PARTNER
- ☒ Aa_partner
- ☐ test_ishan01
- ☐ Abhi_Distributor
- ☐ CLEAN COMMUNICATIONS LTD

The page displays records for the selected resellers only.

Generating billing report

To generate a billing report

1. In the left navigation pane, select **Customer Service>Distributor Portal**.

A list of available distributors appears.

1. On the **Distributor Portal View** page, click **Billing Report**.

The application generates a distributor wise one day service usage report as on previous date as shown in the sample image below.

One Day Service Usage Report

Choose a date: 3/12/2023

Note: The data in this report can take up to 24 hours to refresh.

Billing Report Date: 12.03.23

Customer Name	PA Quota	PA Usage	PA % Used	eDiscover Quota	eDiscover Usage	eDiscover % Used	EC Quota	EC Usage	EC % Used	FS Quota	FS Usage	FS % Used	Surveillance Quota	Surveillance Usage	Surveillance % Used
LiveOffice	0	457	0%	0	15	0%	0	0	0%	0	0	0%	0	64	0%
QA_QA/RT/Office365	5	9	180%	5	10	200%	5	9	180%	5	0	0%	3	25	833%
QA_AutoIndexing	0	20	0%	0	20	0%	0	0	0%	0	0	0%	0	0	0%
QA_Next001	100	36	36%	100	38	38%	0	0	0%	0	0	0%	0	0	0%
QA_AutoManageRegres	5	35	700%	5	0	0%	5	35	700%	5	0	0%	0	0	0%

Items per page: 5 | 1 - 5 of 919

1. To get the one-day service usage report, click the **Calendar** icon, and select the date. Then, click **Apply**.
2. Click the **Download** icon to download this report.

Customer Service administration roles

This section includes the following topics:

- [About Customer Service administration roles](#)
- [Changing the permissions for a built-in Customer Service administration role](#)
- [Creating custom Customer Service administration roles](#)
- [Editing, renaming, or deleting custom Customer Service administration roles](#)
- [Assigning Customer Service administration roles](#)

About Customer Service administration roles

You can assign Customer Service administration roles to your company's administrator accounts. These administration roles allow access only to those areas of the Customer Service tool that are required to perform a particular set of administration functions. An account can be assigned more than one Customer Service administration role, if required.

Two types of administration role are available:

- **Built-in roles.** These roles are the supplied administration roles that are available for immediate use. Each built-in role is supplied with a set of default permissions that are appropriate for performing that role. The built-in roles for Customer Service are as follows:

CUSTOMER MANAGER	THE MOST POWERFUL CUSTOMER SERVICE ADMINISTRATION ROLE, IT PROVIDES ACCESS TO ALL OF THE AREAS OF THE CUSTOMER SERVICE TOOL.
Customer Role Manager	Allows the configuration of Customer Service roles and permissions.
Report Manager	Allows the generation and management of Customer Service reports.

- **Custom roles.** You create these roles as required, to provide tailored access to specific areas of the Customer Service tool. You can create as many custom roles as you want.

You can manage and assign Customer Service roles from the Customer Service Roles node in the left navigation pane of Customer Service. The Overview page of the Customer Service Roles node displays a list of all the Customer Service roles currently in use. The list also shows the number of accounts that are assigned to each role.

Changing the permissions for a built-in Customer Service administration role

You can modify some of the permissions of the built-in Customer Service administration roles, except for the Customer Manager role.

“ ”

Note: Any changes that you make to a role affect all of the accounts to which the role is assigned.

“ ”

To change the permissions for a built-in administration role

1. In the left navigation pane of Customer Service, expand the **Customer Service Roles** node, and click **Administration Roles**.
2. In the Built-in Roles section, click the role you want to edit.

The Administration Roles page displays the currently selected permissions that are granted to the role.

1. Select or clear the check boxes next to the permissions you want to grant or remove for the selected role.

“ ”

Note: Some permissions cannot be deselected for a built-in administration role.

“ ”

2. Click **Save**.

Creating custom Customer Service administration roles

If required, you can create custom Customer Service administration roles. Each custom administration role can have the complement of permissions that you require.

To create custom Customer Service administration roles

1. In the left navigation pane of Customer Service, expand **Customer Service Roles** and then click **Administration Roles**.
2. Right-click **Custom Roles** and on the shortcut menu click **Add**.
3. In the text box at the bottom of the list of custom roles, enter a name for the new custom role.
4. Select the check box for each permission that you want to grant to the custom role.
5. Click **Save**.

Editing, renaming, or deleting custom Customer Service administration roles

You can edit the permissions that are granted to a custom Customer Service administration role.

“ ”

Note: Any changes that you make to a role are applied to all of the accounts that are assigned to the role.

“ ”

You can also delete or rename custom Customer Service administration roles.

“ ”

Note: You cannot delete or rename the built-in roles.

“ ”

To edit a custom Customer Service administration role

1. In the left navigation pane of Customer Service, expand **Customer Service Roles** and then click **Administration Roles**.
2. Right-click **Custom Roles** and on the shortcut menu click **Edit**.
3. Select or clear the permissions check boxes to grant or remove permissions as required.
4. Click **Save**.

To rename a custom Customer Service administration role

1. In the left navigation pane of Customer Service, expand **Customer Service Roles** and then click **Administration Roles**.
2. Right-click **Custom Roles** and on the shortcut menu click **Edit**.
3. In the text box, enter the new name for the custom role.
4. Click **Save**.

To delete a custom Customer Service administration role

1. In the left navigation pane of Customer Service, expand **Customer Service Roles** and then click **Administration Roles**.
2. Right-click **Custom Roles** and on the shortcut menu click **Delete**.

Customer Service asks you to confirm that you want to delete the role.

Assigning Customer Service administration roles

You can assign the Customer Service built-in administration roles or custom administration roles to your company's archive accounts, as required.

“ ”

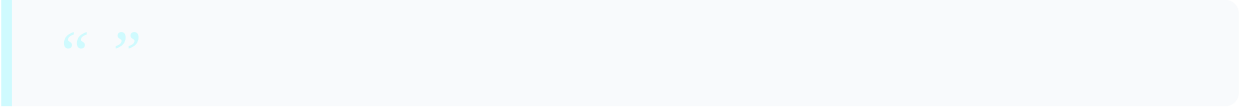
Note: You can assign multiple roles to an account if you want.

“ ”

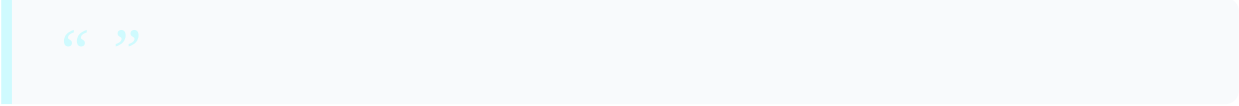
To assign Customer Service administration roles

1. In the left navigation pane of Customer Service, expand **Customer Service Roles** and then click **Assign Accounts**.
2. From the list of archive accounts, select the account to which you want to assign a role.

3. On the Role Change page, select the check box for each built-in role or custom role that you want to assign to the account.



Note: Click the name of a role to see a list of the permissions that are currently granted to that role.



4. Click **Save**.

Reporting

This section includes the following topics:

- [About reporting in Customer Service](#)
- [Viewing the Customer Service reports](#)
- [Creating subscriptions to the Customer Service reports](#)

About reporting in Customer Service

You can view the statistical reports on a customer's archive usage, and save these reports for future reference. You can export these reports as EXCEL, PDF, CSV, and WORD formats. You can also set up subscriptions to a weekly email that contains a selected report. A monthly report newsletter is also available.

Two main Customer Service reports are available for viewing or email subscription:

CUSTOMER WEEKLY SUMMARY	THIS REPORT SHOWS THE TRENDS IN THE MAIL VOLUME AND THE SIZE OF MAIL THAT HAS BEEN SAVED TO THE ARCHIVE. IT INCLUDES\:
	- 10-DAY ROLLING DATA FOR ARCHIVED MAIL VOLUMES SHOWING MAIL NUMBERS AND MAIL SIZE, IN BOTH CHART FORMAT AND TABLE FORMAT.
	- A LIST OF THE CUSTOMER'S TOP TEN UNPROVISIONED ACCOUNTS. FOR EACH ACCOUNT THE LIST SHOWS THE EMAIL ADDRESS AND THE NUMBER OF EMAILS THAT THE UNASSIGNED LEGACY ACCOUNT HAS RECEIVED FOR IT.
Summary of Unprovisioned Archive Accounts	A full list of the customer's unprovisioned accounts. In each case the report shows the email address and the number of emails that the unassigned legacy account has received for that address.

The following additional report is available for subscription only:

CUSTOMER JOURNAL WARNING	A CUSTOMER JOURNAL WARNING REPORT.

Viewing the Customer Service reports

You can view the Customer Service reports for any customer you select.

To view a Customer Service report

1. In the left navigation pane, click Reports and Notifications > Customer Reports.

The **Customer Service Reports** page appears.

1. In the Select Customer drop-down list, select the customer who is to be the subject of the report.
2. In the **Select Report** drop-down menu, select the required report.
3. Click **Apply**.
4. If required, click **Export** icon to export the report in EXCEL, PDF, CSV, or WORD format.

Creating subscriptions to the Customer Service reports

Customer Service reports can be delivered in a weekly email to the customer accounts that have the Archive Administration roles you select. You can also set up a subscription for a specified email address to a monthly email report.

To create subscriptions to Customer Service reports

1. In the left navigation pane of Customer Service, expand the **Reporting** node and click **Report Subscriptions**.
2. In the **Select Customer** drop-down menu, select the customer who is to be the subject of the report.
3. In the **Select Report** drop-down menu, select the report you want to send.
4. Select the **Send reports update** check box.
5. Under Administration Roles to Subscribe, choose which Archive Administration roles are to receive the subscription. For example, if you select **Policy Manager** all of the selected customer's accounts that hold the **Policy Manager** role are sent the report.

“ ”

Note: To see which of the selected customer's accounts currently belong to a particular role, click the role name in the role list.

“ ”

6. To subscribe someone who does not currently use the archive, enter that person's email address in the **Emailbox**, and click **Submit**.
7. Click **Save**.