
User's Manual for

exchange@PAM

MS Outlook AddIn

version 3.6

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Introduction

With the **exchange@PAM MS Outlook AddIn** (for MS Outlook 2000/2003/2007/XP) installed the user can administer all archived and non-archived e-mails directly and can use full-text search in e-mails and attachments.

This manual describes all features of **exchange@PAM MS Outlook AddIn**. No special previous knowledge is needed.

Overview

Prerequisites

As for terminal servers, *Visual Basic Scripting Support* for MS Outlook should be installed. Further information about the **exchange@PAM MS Outlook AddIn** Setup program will be given in the “Installation” chapter.

Appearance – exchange@PAM MS Outlook AddIn

Following installation, the **exchange@PAM** menu appears on the MS Outlook menu bar. This menu relates to archived and non-archived e-mail management. (Figures 2.1 and 2.2)

Detailed information about menu items can be found in the following chapters.

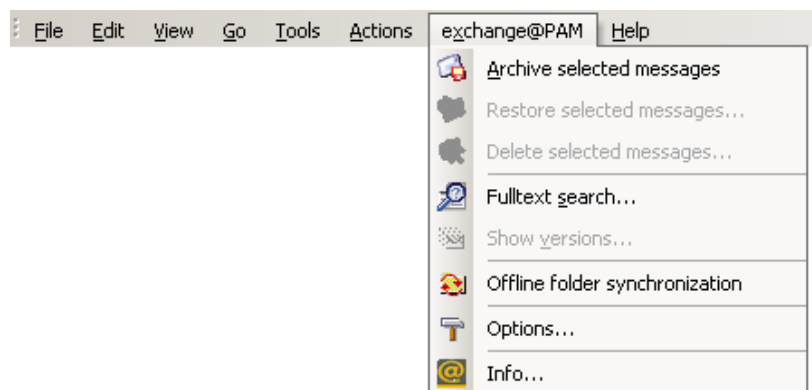


Figure 2.1

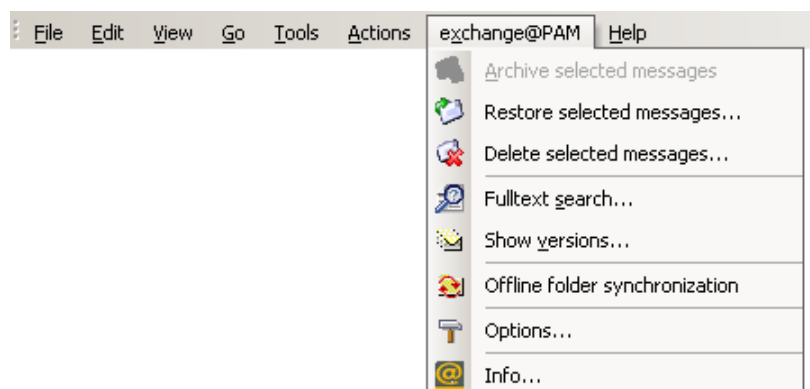


Figure 2.2

E-mail icons displayed on the toolbar indicate whether an e-mail is archived or not (Figure 2.3)

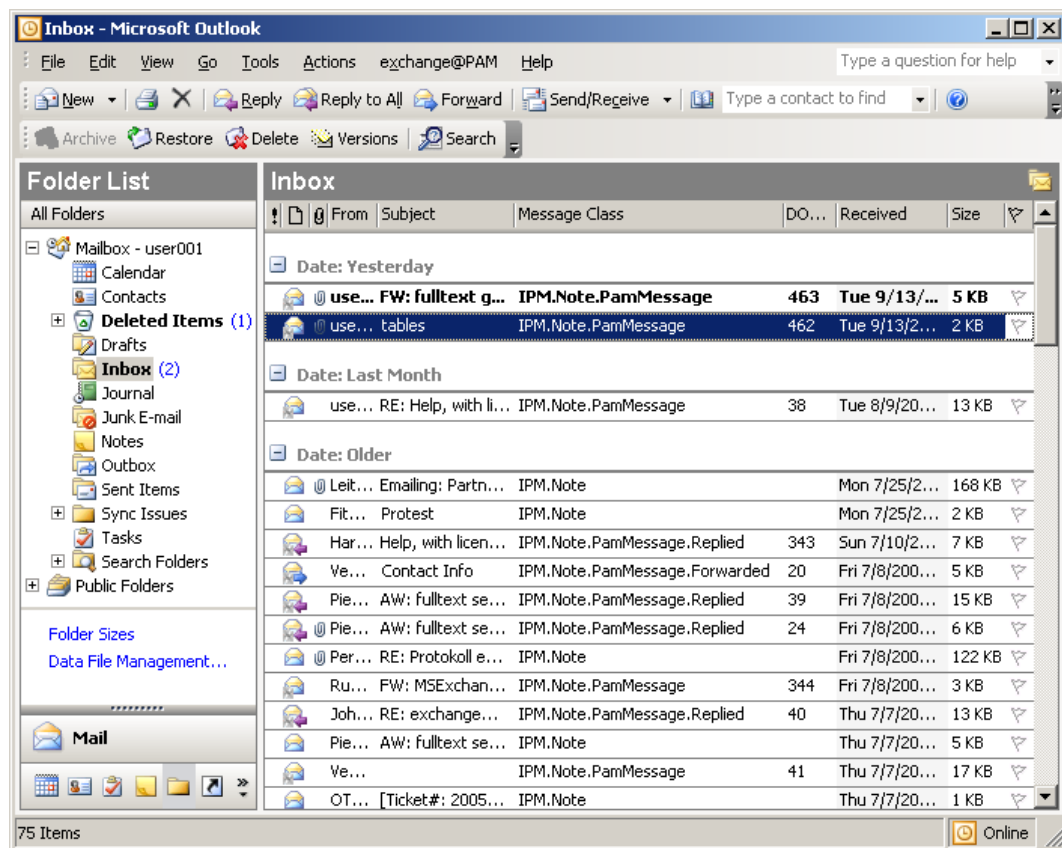


Figure 2.3

Examples:

-  this icon indicates archived e-mails.
-  this icon along with **bold message headers** indicates that e-mails are archived and unread
-  this icon indicates that e-mails are archived and have been answered (replied)
-  this icon indicates that e-mails are archived and have been forwarded

Installation

Before installing, please close all running applications and make sure that the process **Outlook.exe** has been terminated in **Task Manager**. After running the Setup program, you will be asked to choose the language (Figure 3.1). **Exchange@PAM MS Outlook AddIn** supports English, German and Italian. Choose the preferred language and step forward by clicking **OK**.



Figure 3.1

During the setup you will be asked to specify the exchange@PAM Retrieve and Archive Server names (Figure 3.2). Please enter the names of **exchange@PAM Archive** and **Retrieve** servers. If Archive and Retrieve Servers are installed on the same computer, enter the computer name in the **Retrieve Server** text box. If you do not know this computers' names please contact your system administrator.

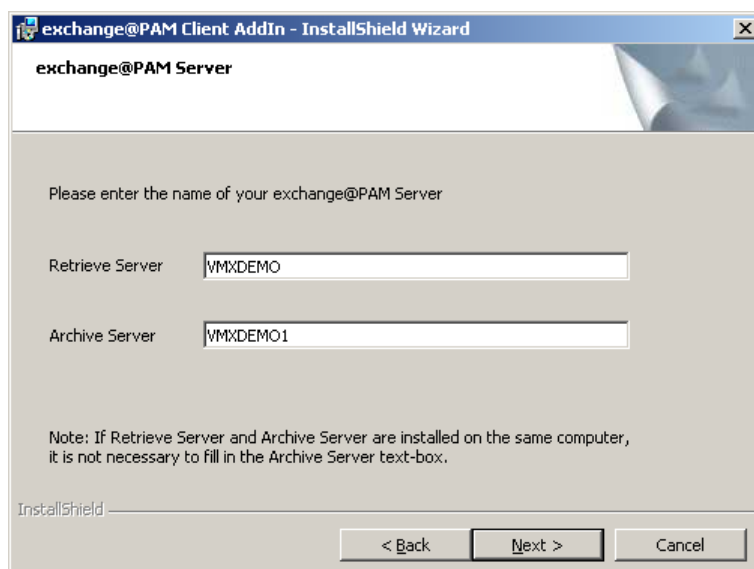


Figure 3.2

End the **exchange@PAM MS Outlook AddIn** Setup program by clicking on the **Finish** button.

Upon installing **exchange@PAM MS Outlook AddIn**, open your MS Outlook. Opening Outlook for the first time after installing exchange@PAM MS Outlook AddIn, will take longer than usual as the AddIn must be loaded. When you open MS Outlook the next time, the interval will be shorter.

exchange@PAM MS Outlook AddIn features

The exchange@PAM menu varies, depending on the selected item.

When a non-archived e-mail is selected you can see the following list of commands and menu-items listed in the **exchange@PAM** menu. (Figure 4.1)

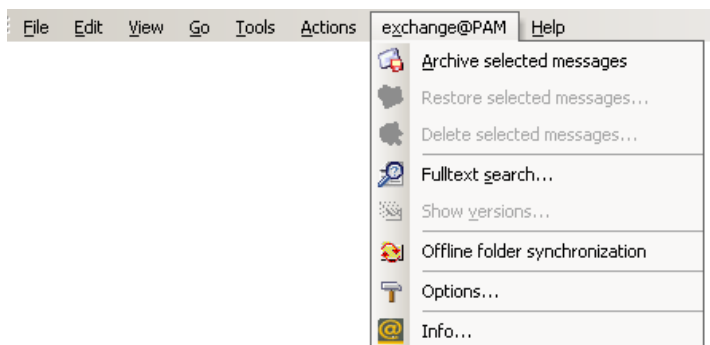


Figure 4.1

When an archived e-mail is selected, the **exchange@PAM** menu will have the following commands and menu-items. (Figure 4.2)

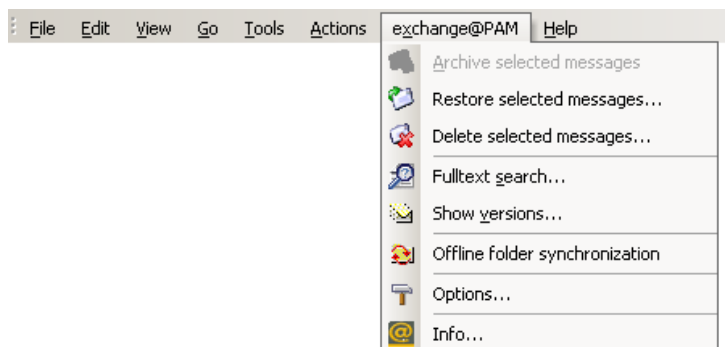


Figure 4.2

You may also display the **H&S Toolbar**. In order to do so, just right-click any toolbar, and then select **H&S Toolbar** from the shortcut menu (Figure 4.3).

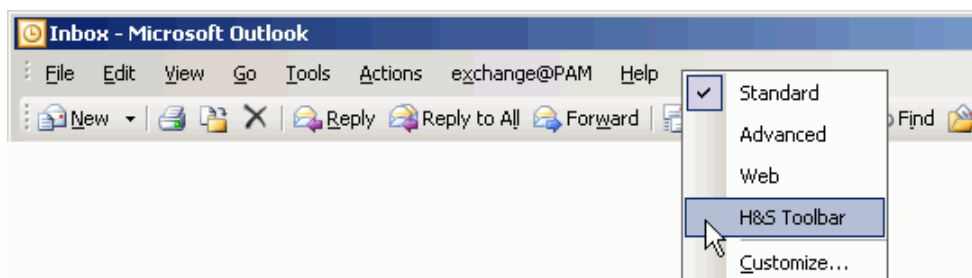


Figure 4.3

The **H&S Toolbar** can be found on the **View** menu, under **Toolbars**. (Figure 4.4)

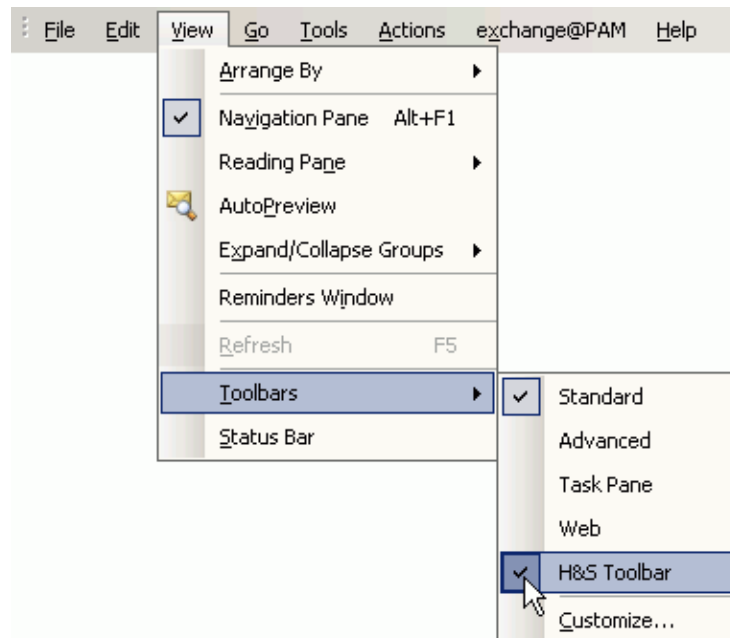


Figure 4.4

The displayed toolbar varies, depending on the type of e-mail selected (an archived or a non-archived e-mail).

The **H&S Toolbar** can be displayed in two ways: with an active or inactive **Archive** icon. (Figure 4.5 a), b))



Figure 4.5 a)



Figure 4.5 b)

In the following chapters you will find additional information about menu items and functions.

Archiving selected e-mails

You may choose to archive several e-mails or documents at a time. Selected e-mails and documents are archived by clicking the **Archive** command on the **exchange@PAM** menu or the respective icon on the **H&S Toolbar**. (Figure 4.6 and 4.7)

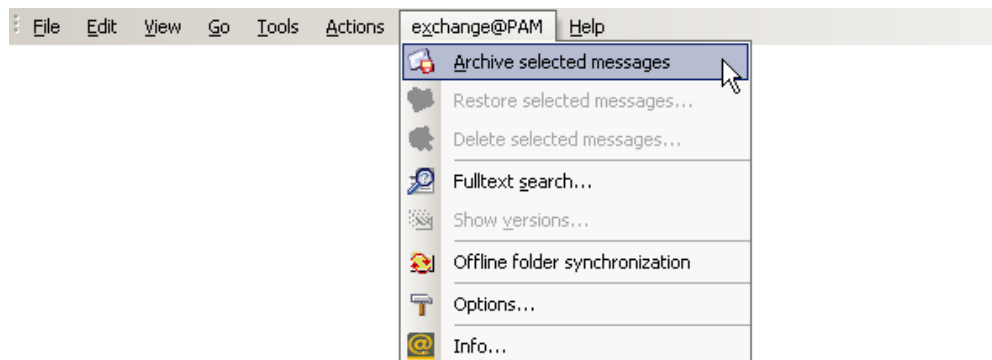


Figure 4.6

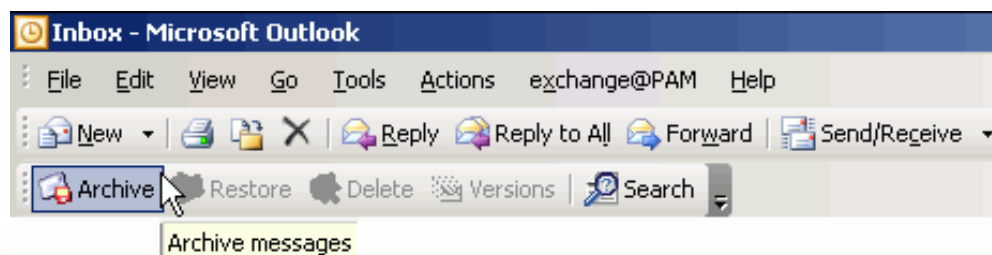


Figure 4.7

You may also archive e-mails and documents from a **Public Folders** folder. For that, however, you need to be assigned certain rights. Those rights can be assigned in **exchange@PAM Enterprise Manager**.

The **Archiving messages** box appears during the archiving process. (Figure 4.8)



Figure 4.8

An archived e-mail can be opened simply by double-clicking it. It can take some time while MS Outlook retrieves respective e-mails from the HSM Store (Figure 4.9).

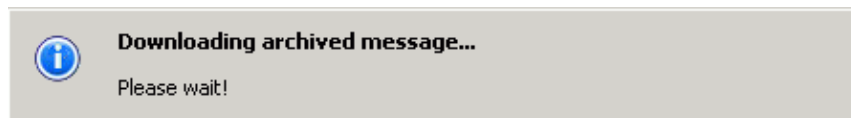


Figure 4.9

Restoring selected e-mails

By using the **Restore selected messages** command on the **exchange@PAM** menu, or by using the **Restore** button on the **H&S Toolbar**, you can restore selected archived e-mails from the HSM Store. (Figures 4.10 and 4.11)

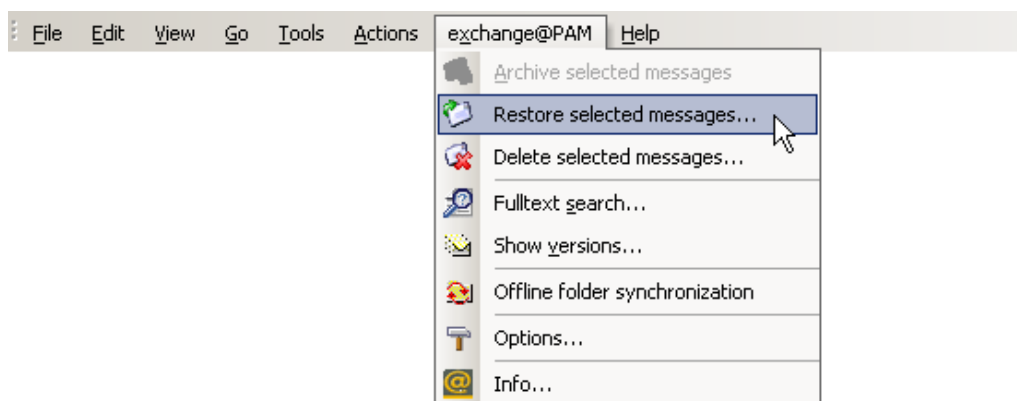


Figure 4.10

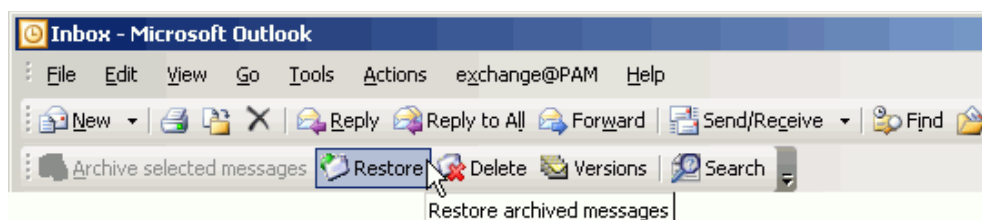


Figure 4.11

Upon clicking on the **Restore** icon, the following dialog box appears. (Figure 4.12)

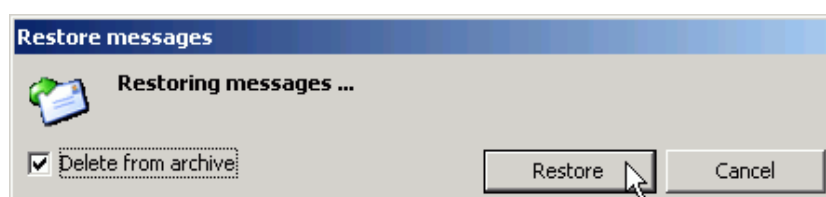


Figure 4.12

By selecting the **Delete from archive** check-box you will mark the selected e-mails in the HSM Store for deletion and they will be deleted when their retention period expires. Full-text search is still available in these archived mails and documents until they are physically deleted upon expiration of their retention period.

By not selecting the **Delete from archive** check-box, the respective e-mail will be restored only and it will not be marked in the HSM store for deletion. Its shortcut will be replaced on the MS Exchange Server with the original e-mail.

NOTE: If you delete archived e-mails from your mailbox using the **Delete** key on your keyboard only the administrator of exchange@PAM can restore them.

Deleting selected e-mails from archive

With this menu option (Figure 4.13) the archived e-mails are deleted from the Exchange Server. They can also be marked for deletion from the HSM Store and consequently, they will be deleted when the retention period expires.

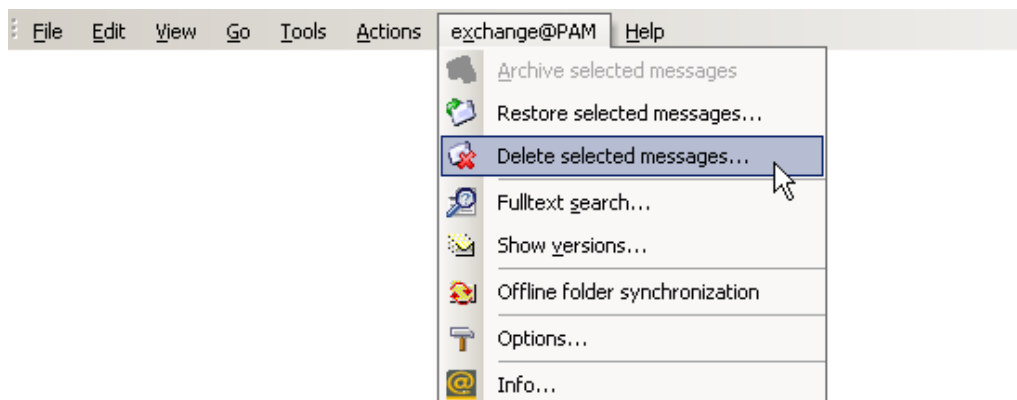


Figure 4.13

By not selecting the **Delete from archive** check box the respective e-mail/shortcut will be deleted from the Exchange Server. However, it will not be marked for deletion in the HSM store. Such item is displayed as lost in the **exchange@PAM Enterprise Manager**. It can be restored by the administrator during its retention period until the Shortcut synchronization job runs (see the *Administrator Manual for exchange@PAM*).

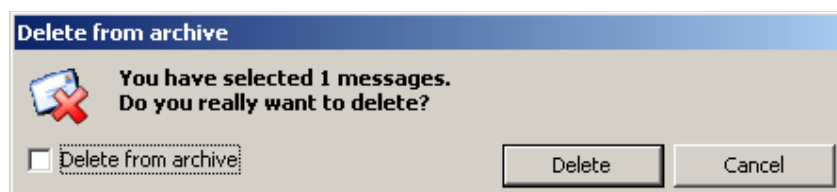


Figure 4.14

Full-text search

Full-text search is used for searching through archived e-mails and attachments. It can be used even for searching through archived and subsequently restored mails and also through archived e-mails having been marked in the HSM store for deletion. Full-text search is accessible either from the **exchange@PAM** menu or from the **H&S Toolbar**, if it is displayed. (See Figures 4.15 and 4.16)

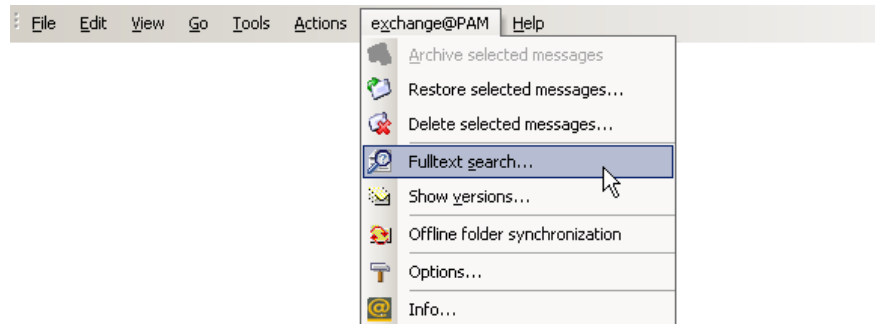


Figure 4.15

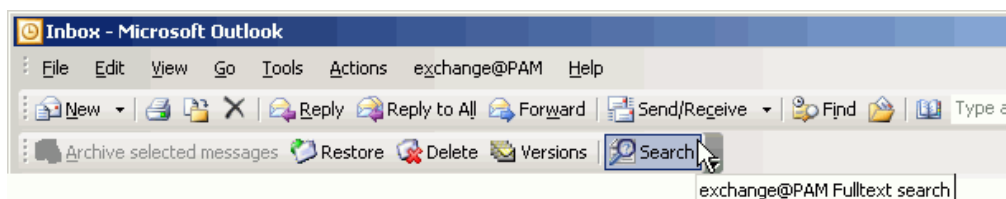


Figure 4.16

By clicking on **Fulltext search** command on the **exchange@PAM** menu, or by clicking on the **Search** icon on the toolbar, the following window will be displayed. (Figure 4.17)

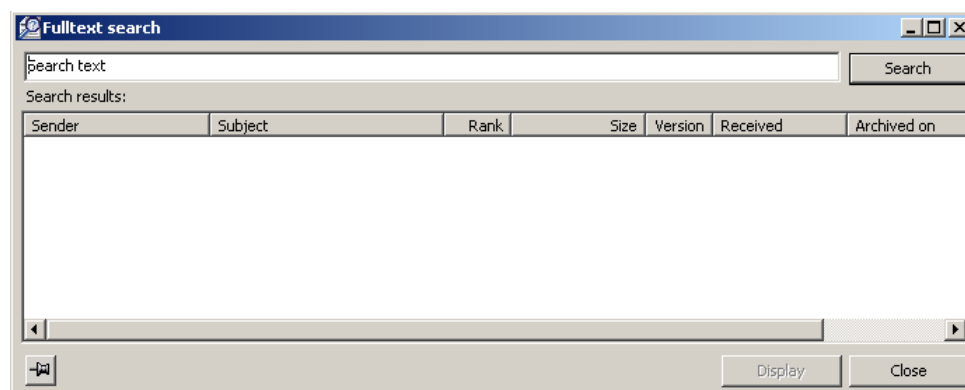


Figure 4.17

The entered keyword is subsequently looked for in the:

- subject
- bodytext
- attachments

The result of the search is then displayed in the **Search results** window, where you can retrieve e-mails by simply selecting them and clicking on the **Display** button (Figure 4.18) or by double-clicking them.

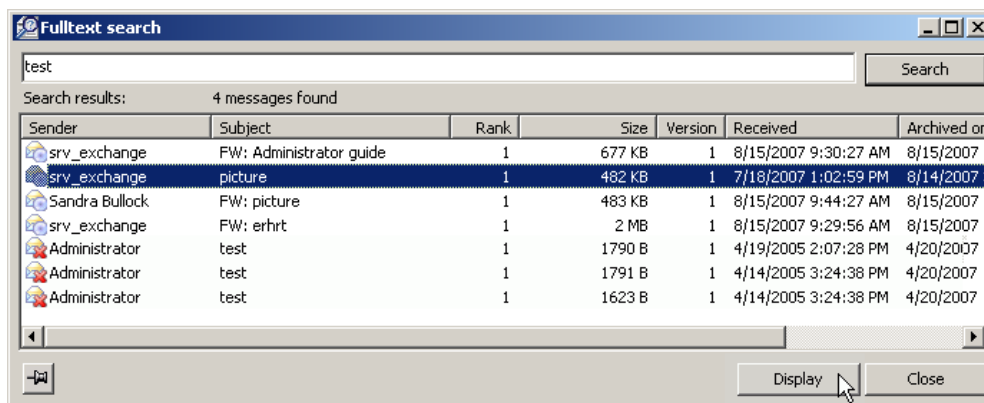


Figure 4.18



this icon indicates that archived e-mails match the search criteria



this icon indicates that archived e-mails match the search criteria, but have been marked in the HSM store for deletion, and will be deleted when their retention period expires

The entered words (Figure 4.19) can be used in combination with the logical operators AND, OR. The operator AND is not mandatory. If no logical operator is included, the full-text search query engine searches for documents containing all the given words.

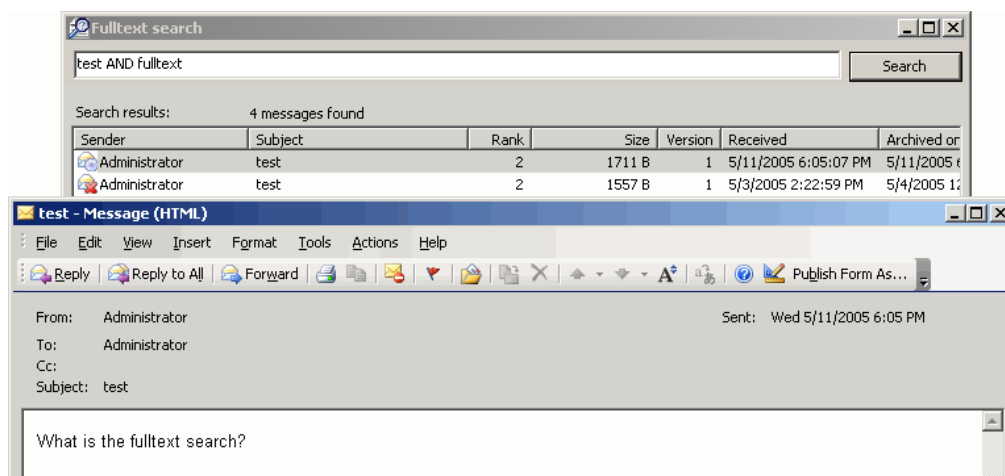


Figure 4.19

Example: Search results for 'test AND fulltext' are the same as search results for the string 'test fulltext' or 'fulltext test'.

The word (or string) to be searched for can also be specified by pattern, using the LIKE operator. (Figure 4.20)

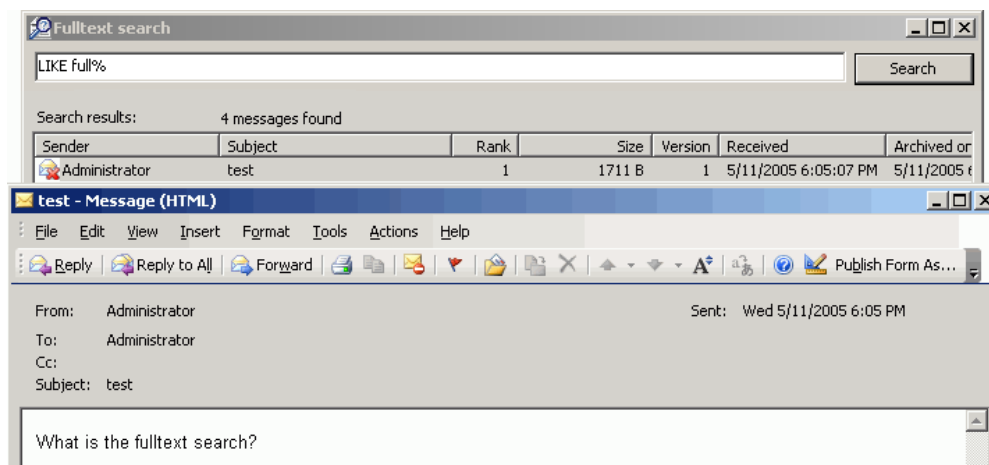


Figure 4.20

The pattern contains the character string to search for and can contain any combination of the following four wildcards.

Wildcard character	Description	Example
%	Any string with a zero or more characters.	'LIKE data%' finds all words beginning with 'data', e.g. database.
_ (underscore)	Any single character.	'LIKE ste_' finds all four-letter words that begins with ste (step, stem etc.).
[]	Any single character within the specified range ([a-f]) or set ([abcdef]).	'LIKE ta[n-s]k' finds words beginning with 'ta', ending with 'k' and where the 3 rd letter is any single character between n and s, e.g. tank, talk etc.
[^]	Any single character not within the specified range ([^a-f]) or set ([^abcdef]).	'LIKE de[^l]%' all words beginning with de and where the following letter is not l.

NOTE: The first 2 characters after LIKE cannot contain one of the above mentioned wildcard specification characters, i.e. %, _ or []. This is a fulltext search restriction which prevents a database timeout error.

NOTE: Full-text search is not case sensitive. The same applies to logical operators: AND, OR and LIKE.

When you intend to look for a phrase (e.g. a group of words that functions as a single unit within a sentence), use quotation marks " ".

Example: When searching for the phrase “text search”, mails containing just the phrase “fulltext search” will not be returned as search results.

There is a counter that shows the number of occurrences of each search word. The number of occurrences is shown in the **Rank** column. The outcome of the full-text search is listed in descending order, as can be seen on the following screenshot. (See Figure 4.21)

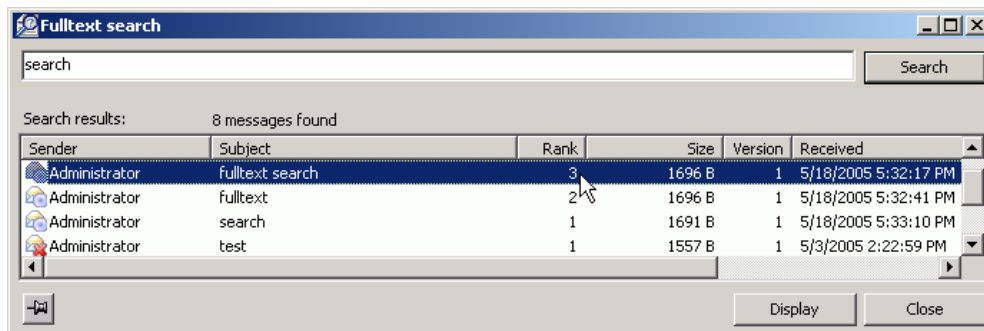


Figure 4.21

Versions

Each time you edit an archived e-mail a new version of that e-mail is created in the HSM Store.

Different versions of an archived e-mail can be checked in the **Versions** window. To do so just click the **Show versions** command on the **exchange@PAM** menu or the **Versions** button on the **H&S Toolbar**. (Figures 4.22 and 4.23)

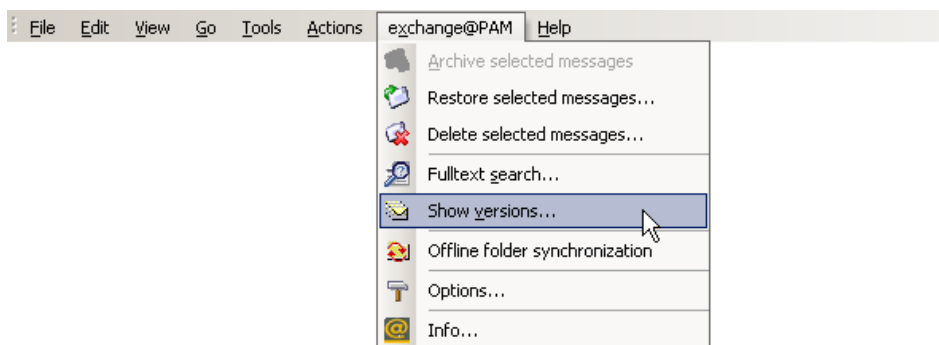


Figure 4.22

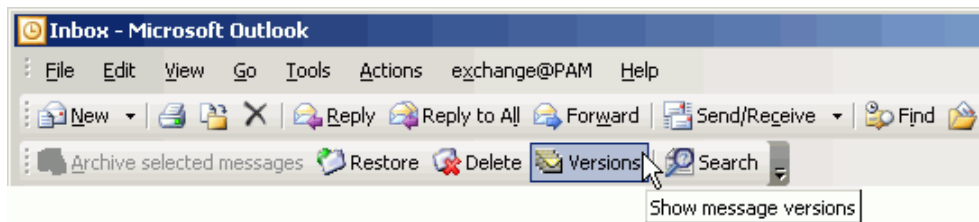


Figure 4.23

The **Versions** window appears, showing all the versions of the respective archived e-mail (Figure 4.24). You can choose to display each version (by clicking on the **Display** button), restore them or create a new e-mail from the selected version. By restoring a selected version, the respective version of that e-mail will be retrieved and deleted (optional) from the archive. By selecting a version and then clicking on the **Create new** button you create a new e-mail based on that respective version. This newly created e-mail is not archived.

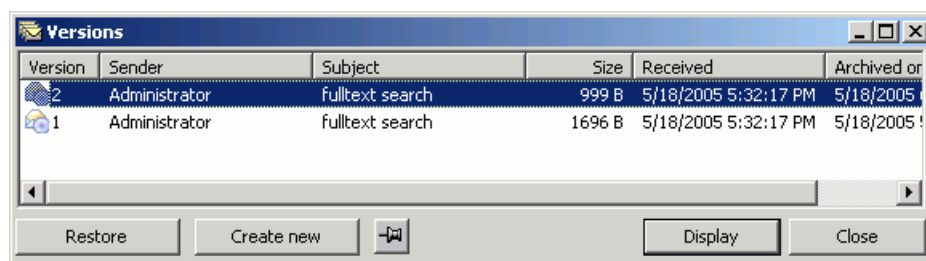


Figure 4.24

If you want to make a new version of an archived e-mail, just open it for editing (Figure 4.25). After saving the changes, a new version is saved in the HSM Store.

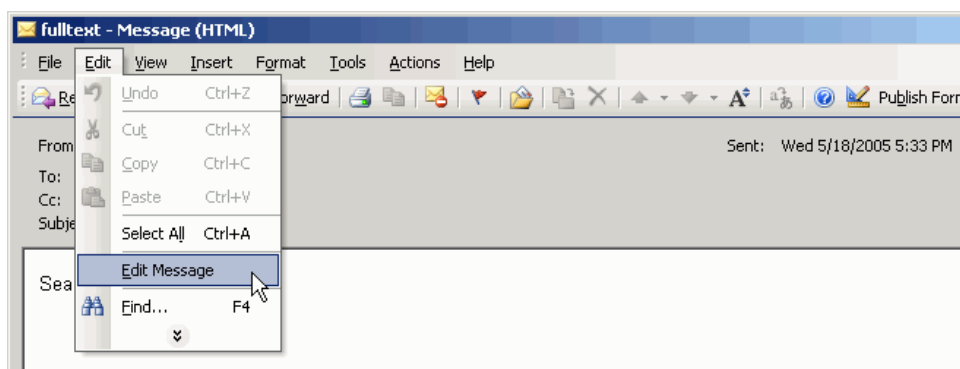


Figure 4.25

The full-text search engine searches for keywords in every version of an e-mail. Therefore search results may contain more than one version of the same e-mail. (Figure 4.26)

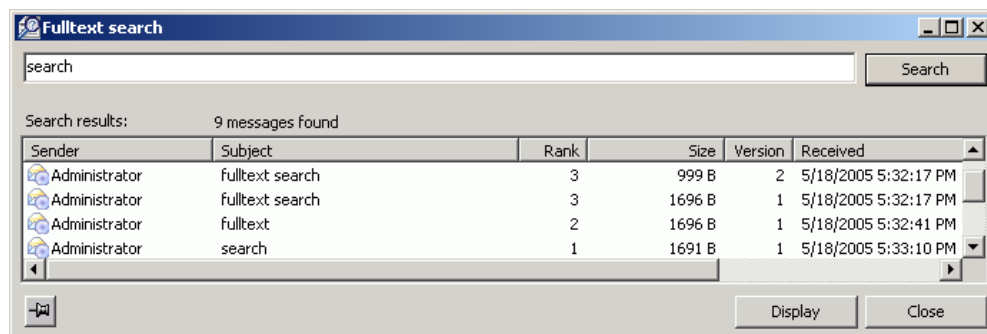


Figure 4.26

Offline synchronization

Working with archived e-mails is possible even when you use your MS Exchange Server mailbox offline.

Before switching to offline mode you must synchronize your Outlook mailbox with the MS Exchange Server. If you also plan to work with your archived e-mails you need to synchronize in exchange@PAM as well.

To work offline with archived e-mails:

1. run Outlook synchronization
2. synchronize offline with exchange@PAM (click on the **exchange@PAM** menu and then on **Offline Folder Synchronization**) (Figure 4.27)

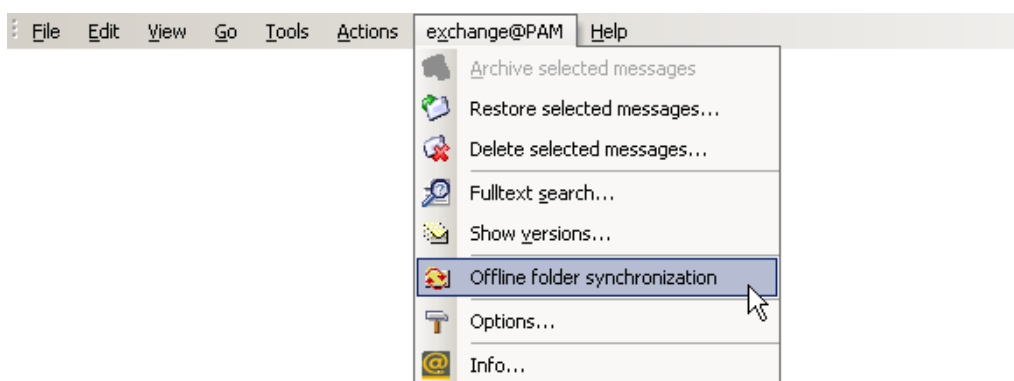


Figure 4.27

NOTE: Auto synchronization is also possible. See the “Cache settings” section.

After working offline and reconnecting to your MS Exchange Server, first you need to synchronize your Outlook mailbox with MS Exchange Server. Then you need to synchronize your Outlook mailbox with exchange@PAM Server as well – by doing so you will update your Outlook mailbox with its current status on the MS Exchange Server.

Options

The **Options** window has two tabs - **Archive** and **Other**.

On the **Archive** tab (Figure 4.28) you can set additional archiving of messages. If you select the **Archive message body** check box, the body of your emails archived via Addin will be saved as a text or an HTML file besides the usual archiving.

In the bottom part of the window the location of Retrieve and Archive servers can be verified. To achieve load balancing, more than one exchange@PAM server could be configured during installation. In that case the Retrieve server is used only for retrieving. However, retrieve and archive server can be the same machine.

When AddIn is installed the primary retrieve server and archive server are defined. The AddIn loads the list of available servers from the primary archive server. When retrieve is performed, the primary retrieve server is used, if this is not available, the next server on the list is used.

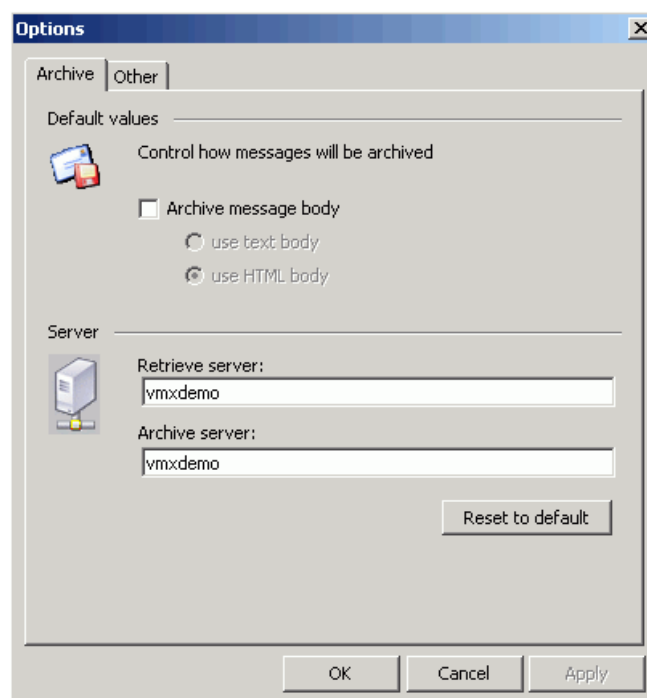


Figure 4.28

Cache settings

On the **Other** tab you can set the time for automatic offline synchronization. Just select either the **Auto synchronize when Outlook starts** or the **Auto synchronize when Outlook exits** option.

You can even schedule offline synchronization to run every “x” minutes which is useful e.g. in case of unexpected network breakdown. To do so, check **Schedule offline synchronization every** check box and enter the desired time interval in the **minutes** text box. If you check the **Show progress dialog** check box, the dialog will pop up whenever the scheduled offline synchronization is running.

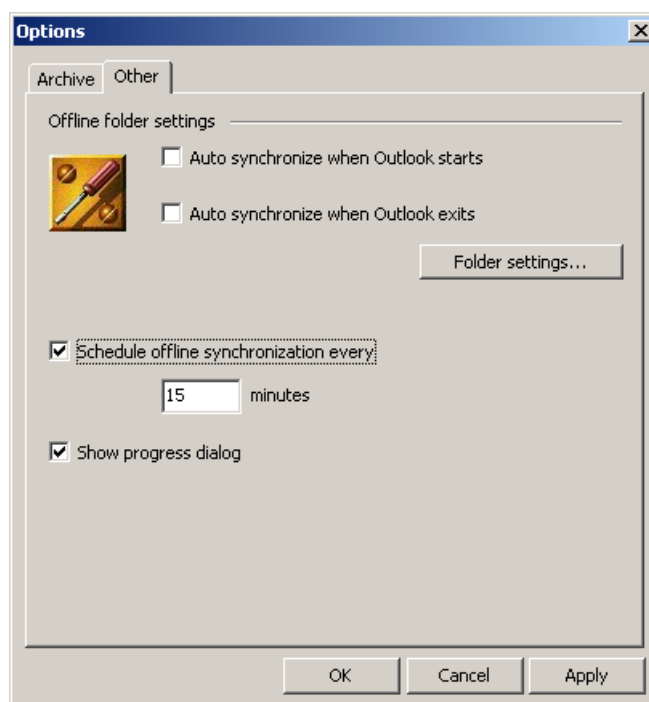


Figure 4.29

When clicking on the **Folder settings** button, the **Offline and cache settings** window is displayed. Here you may check the current location of the AddIn Cache.

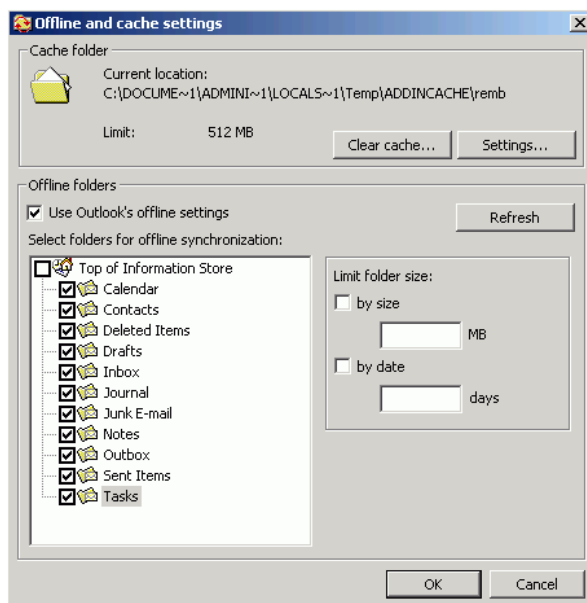


Figure 4.30

You may also clear this cache folder when clicking on the **Clear cache** button. By clicking on the **Settings** button the **Cache folder settings** window appears. Here you can set the size and the global date limit for the cache folder. (Do not forget to check the **Limit cache by date** check box for date limit.)

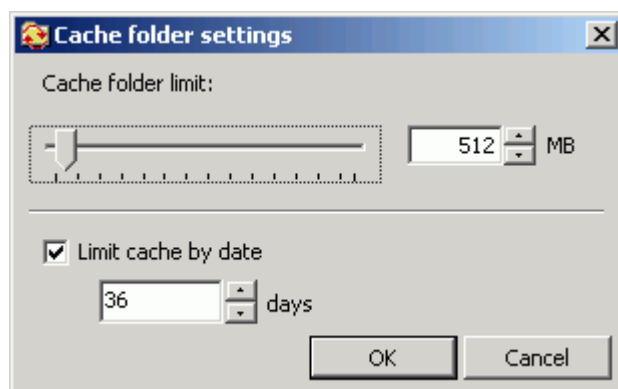


Figure 4.31

In our example (Figure 4.31) the maximum size of the cache is 512 MB and the global date limit is 36 days, i.e. emails older than 36 days will not be cached at offline folder synchronization. User working offline will be able to see the shortcuts of all archived emails but will be able to work only with those which were received in last 36 days.

IMPORTANT NOTE: If the global date limit is set, the cache size limit is ignored.

On the **Offline and cache settings** window you can even select folders for offline synchronization. For each selected folder you may choose if you want to set a limit value for its size or limit it by date, e.g. *items received within last 15 days will be cached*. (Figure 4.32)

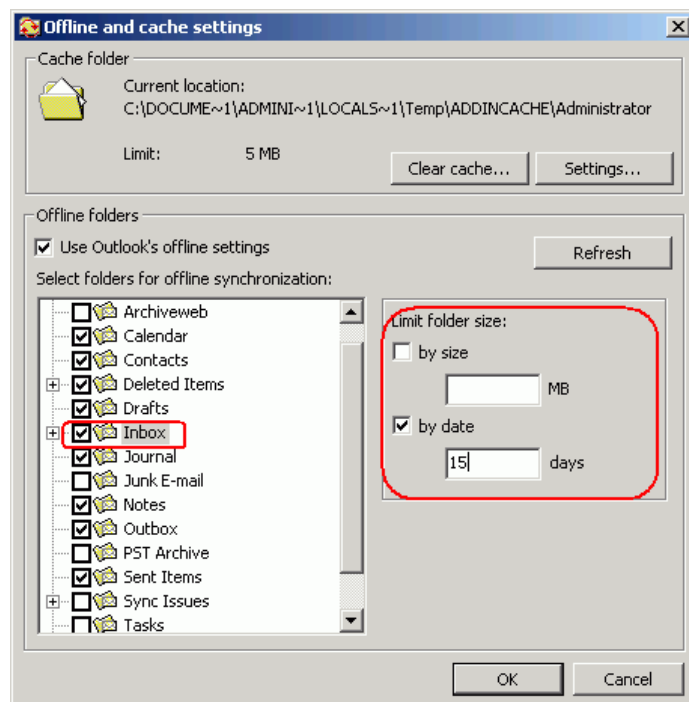


Figure 4.32

IMPORTANT NOTE: To select your own folders for synchronization you have to unselect the **Use Outlook's offline settings** check box. However, the limit for Outlook selected folders can be set also when **Use Outlook's offline settings** check box is selected.

To handle all subfolders of individual folders comfortably right-click the desired folder to unfold its context menu (Figure 4.33):

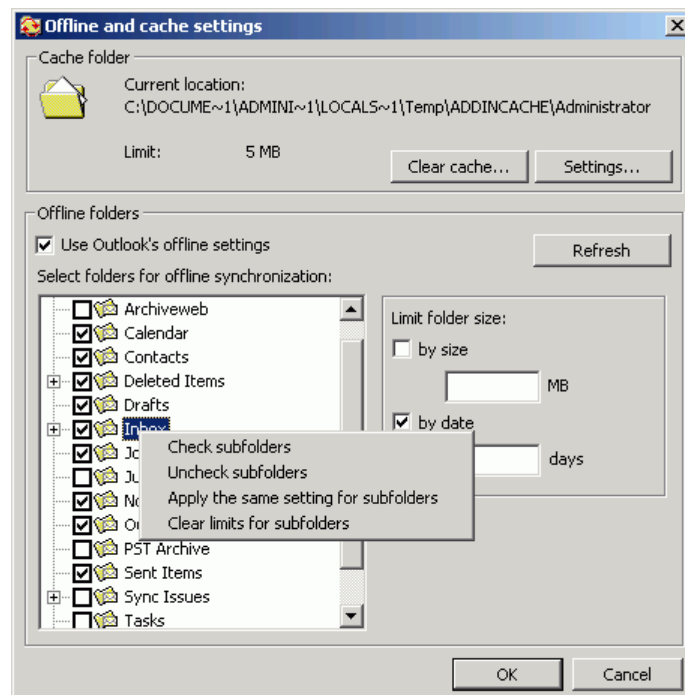


Figure 4.33

Click **Apply the same settings for subfolders** command to copy folder settings to its subfolders.

NOTE: If you have set the size limit (e.g. to 100MG for Inbox) and clicked **Apply the same settings for subfolders** command on the context menu of the selected folder, this size limit is set for every subfolder (i.e. 100MG for Subfolder1, 100MG for Subfolder2, ...).

Info

The last menu item on the **exchange@PAM** menu is the **Info**.

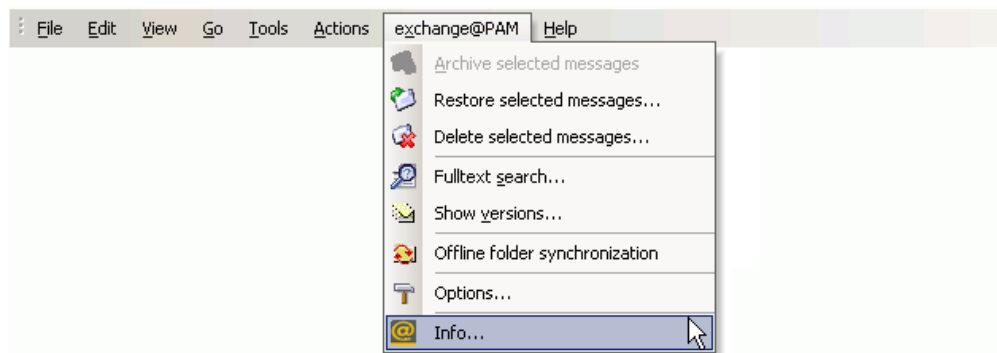


Figure 4.34

This displays the current version as well as the current status of the AddIn. If you want to disable (enable) the **AddIn**, just click on the **Disable (Enable)** button. In case your **AddIn** settings have been changed by the administrator (in the **Enterprise Manager**) in the meantime, make these changes active by reconnecting to the exchange@PAM server. To do so, just click on the **Reconnect** button and click **OK**.

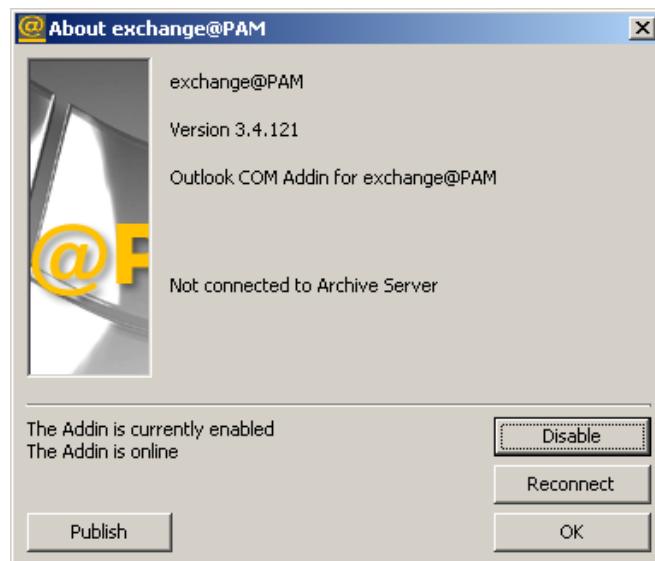


Figure 4.35