Metalogix

Metalogix Software

User Manual for

Outlook:mac & Entourage Extension of Archive Manager Exchange Edition

6.0

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1 Prerequisites

Before installing the Outlook:mac/Entourage Extension of Archive Manager Exchange Edition, please check the following prerequisites:

- Outlook:mac 2011 or Entourage installed on the machine

- Archive server (Archive Manager Exchange Edition) installed in the environment; Archive Server IP address has to be specified as the Archive server name in the Enterprise Manager:

    1) On the Archive Manager server open **Start** / **All programs** / **Metalogix** / **Archive Manager Exchange Edition** / **Enterprise Manager**
    2) On the **Manager view** / **Locations** tab unfold the tree view down to your Archive server. Right-click it and select **Properties**.
   3) In the pop-up dialog enter the Archive server IP address in the **Name** text box. Click **Apply**, then **OK**.
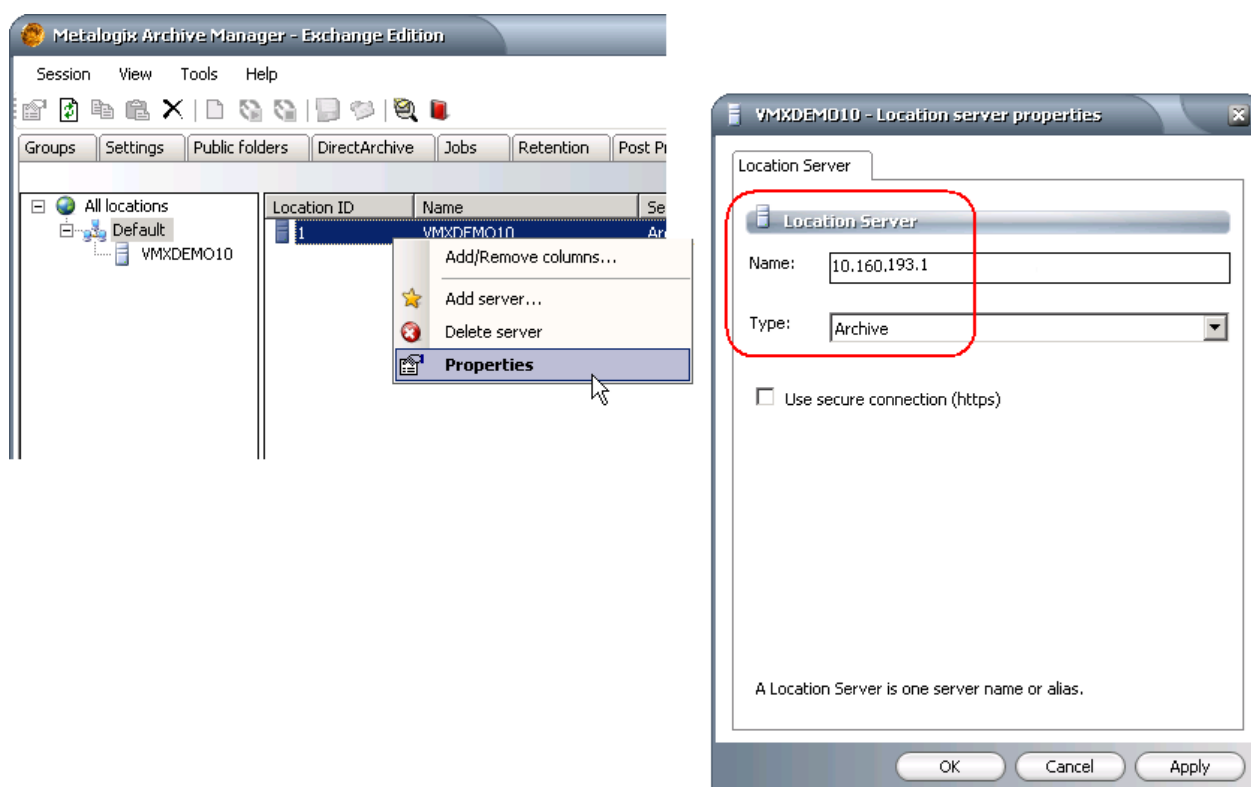
- HTML shortcuts creation has to be configured for Mac users
    It is possible to configure HTML shortcut creation globally or just for Mac users group. In this manual we configure global HTML shortcut creation.
    NOTE: If you want to configure HTML shortcut creation just for the Mac users group, see the "Shortcut template" and "Shortcut user assignment" section of *the Administrator manual for Archive Manager Exchange Edition.*

    1) On the Archive Manager server open **Start** / **All programs** / **Metalogix** / **Archive Manager Exchange Edition** / **Enterprise Manager**

2) On the **Manager view** / **Settings** / **Shortcut templates** node right-click the **Default shortcut template** and select **Properties**.

3) In the pop-up dialog check the **Generate an HTML shortcut form template** check box. From the combo box select **Default** as an HTML shortcut template. Click **Apply**, then **OK**.
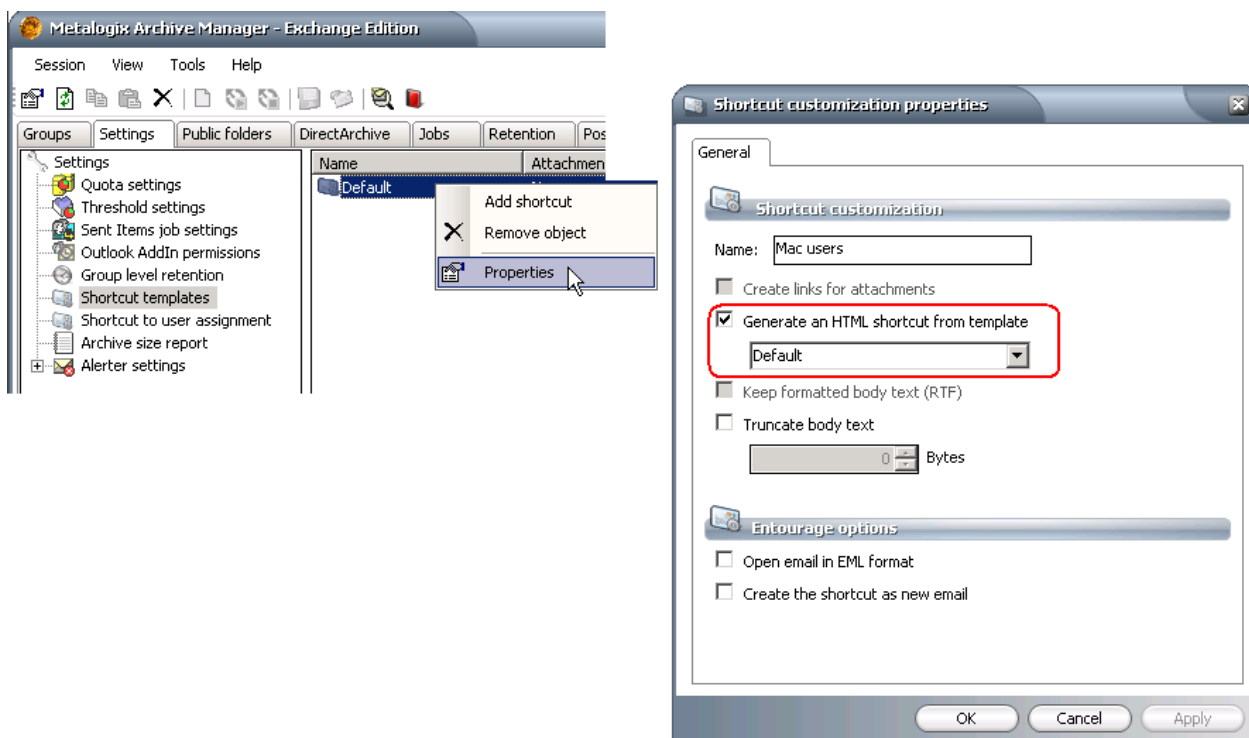
4) On the **Enterprise Manager** / **Tools** / **Options** / **Archiving settings** / **Shortcut** tab select the **Default** shortcut template modified in the previous step. Click **OK**, then **Apply**.
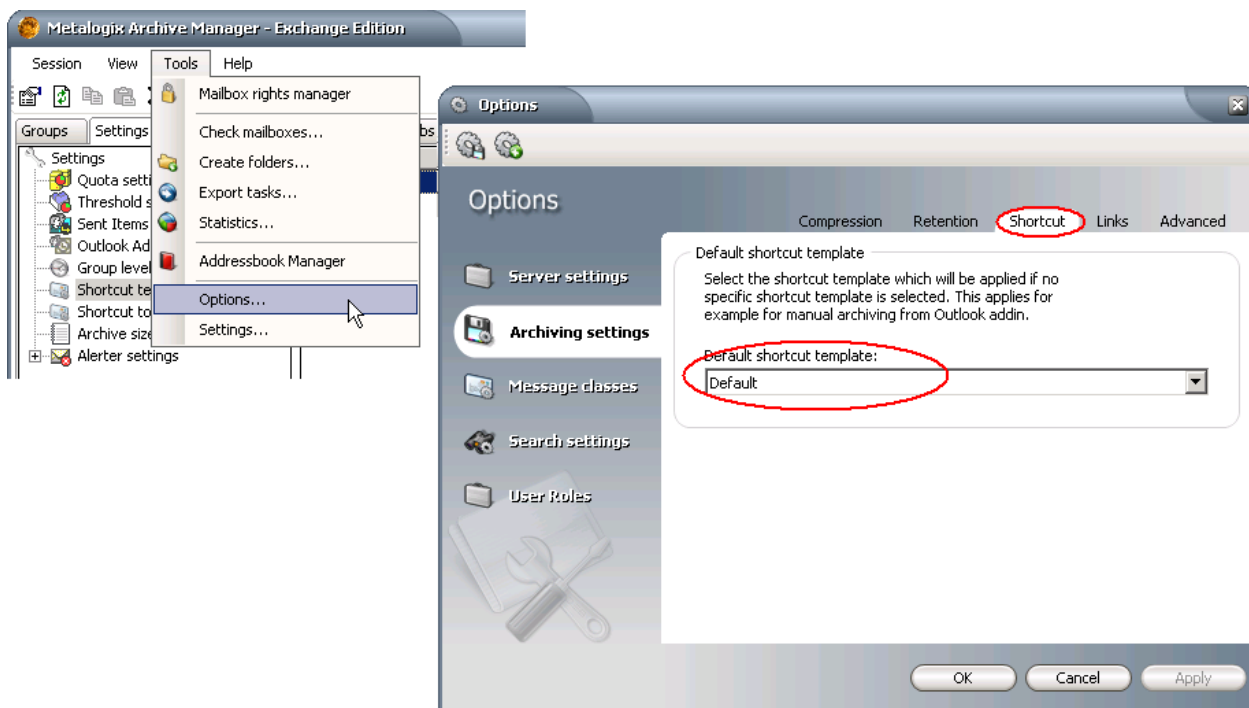
- HTML default shortcut template must be edited
To do so, open **<installdir>\ Metalogix \ MAM4Exchange \ Tools \ Templates** \ **Default** and enter the following string:

%PROPERTIES%

in the <head> section.
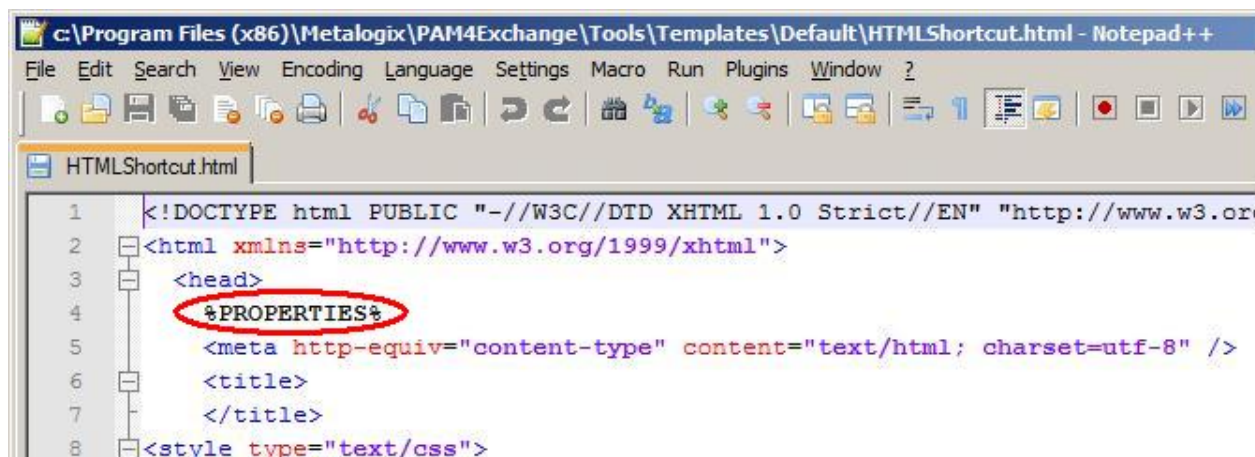
- Manage Addin permissions for users under **Enterprise Manager** / **Manager view** / **Settings** / **Outlook Addin permissions** tab
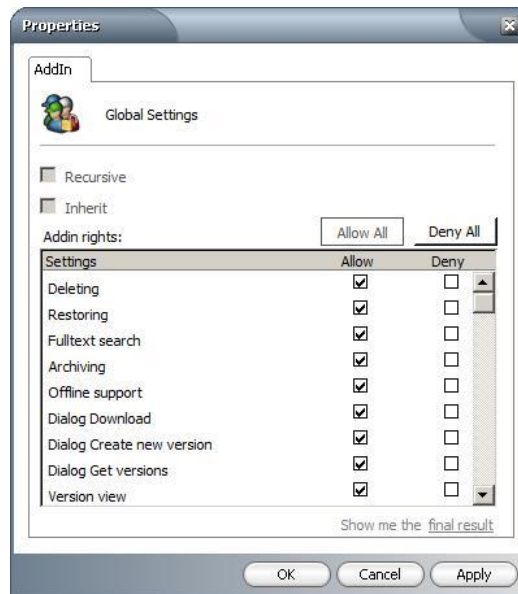
2 Installation

Archive Manager Mac Extension can be used with both Outlook:mac as well as its predecessor – Entourage. We go through both installations – first Outlook:mac installation, then Entourage installations.

Please note that there are different installation files:

- **ArchiveManagerMacAddinForOutlookSetup.dmg** setup file for Outlook:mac installation
- **EntourageAddin.zip** file for Entourage installation

2.1 *Outlook:mac Installation*

To install Outlook:Mac Extension for Archive Manager Exchange Edition:

1. Double click the **ArchiveManagerMacAddinForOutlookSetup.dmg** setup file. A pop-up opens.
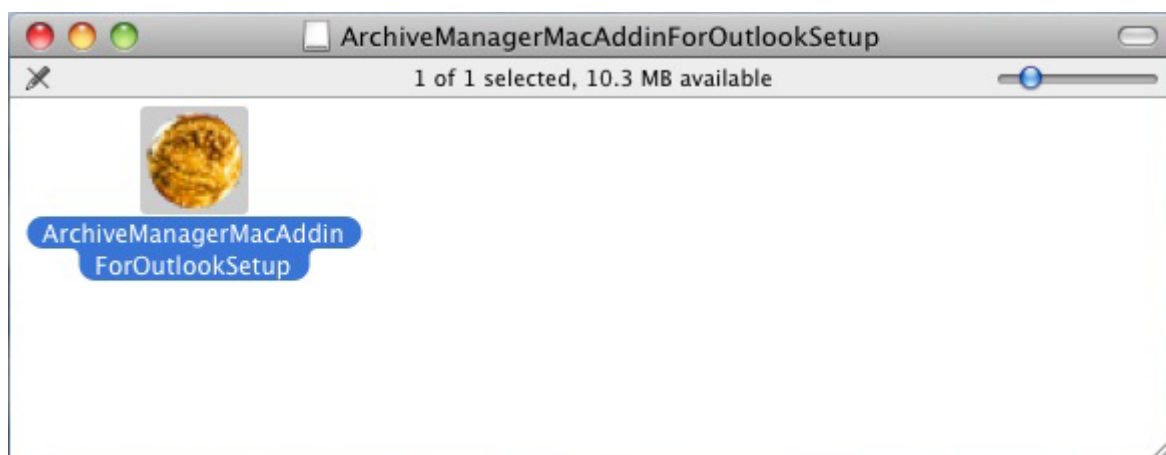
Figure 1: Running the setup file

2. Copy the content to the Applications store.
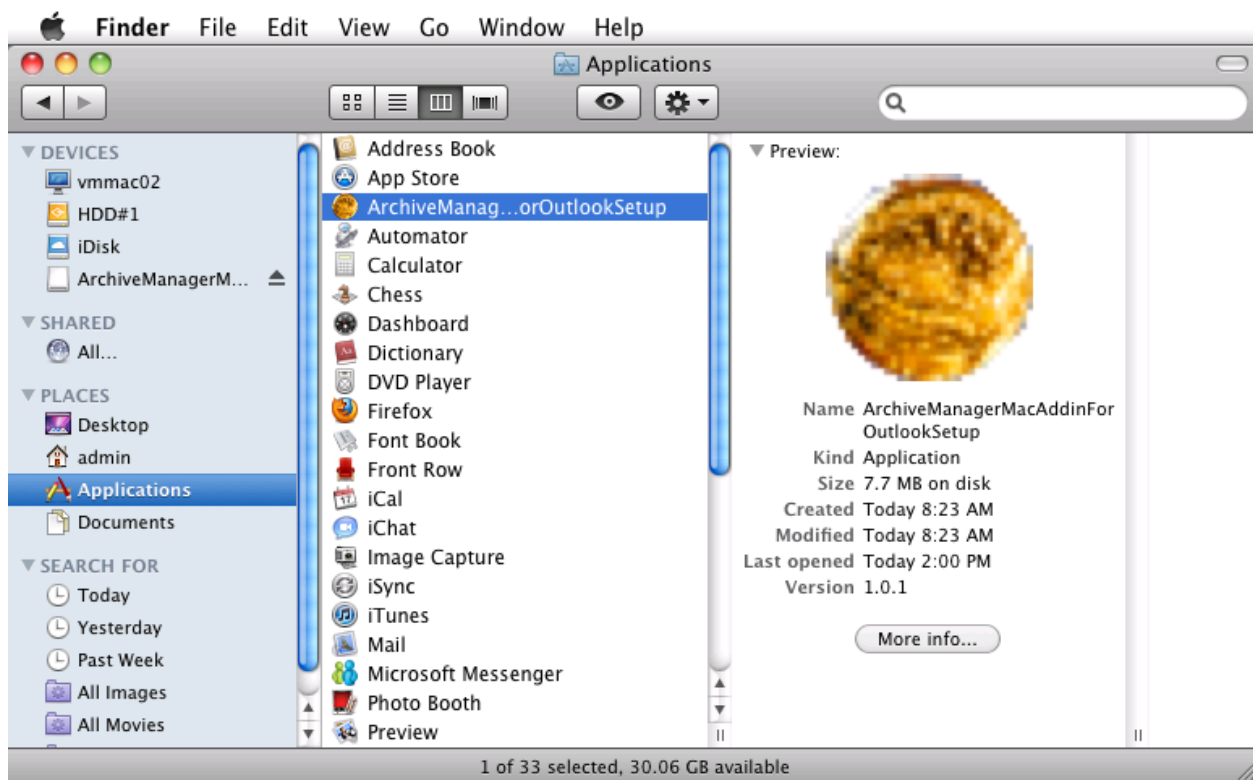
Figure 2: Client in the Application store

3. Launch the installation by double-clicking again in the ArchiveManagerMacAddin pop-up window. You will be asked to specify the Archive Manager **Retrieve** and **Archive Server**. If it is the same machine, enter one IP or Name in both fields. Click **OK**.
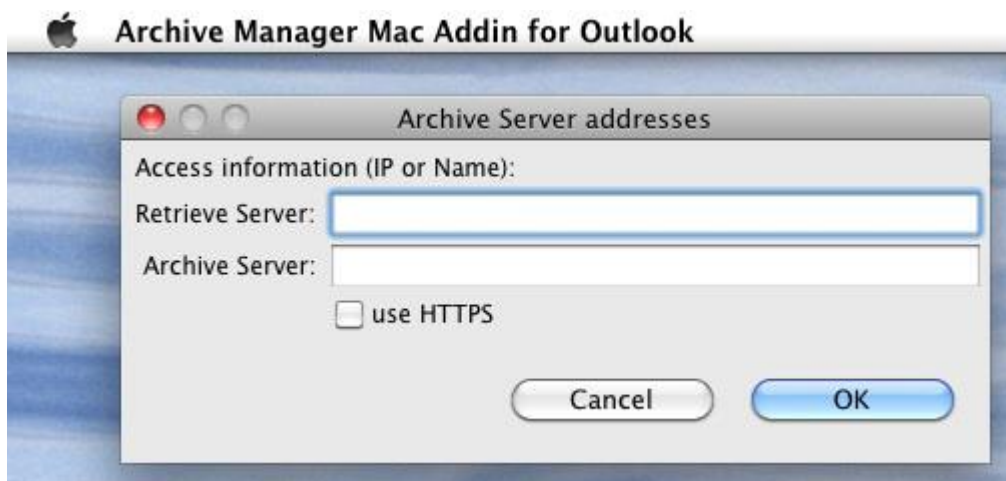
Figure 3: Archive and Retrieve Server specification

4. Click **OK** again to install script menu items for Outlook. Finally you need to restart the Outlook to complete the installation.
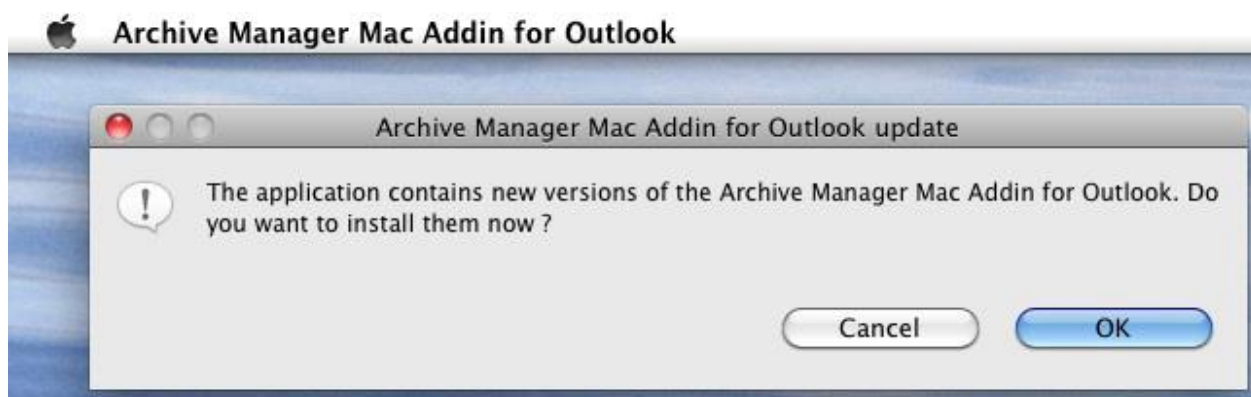
Figure 4: Archive menu installation

NOTE: Outlook:Mac users must have HTML shortcuts creation set in order to preview archived emails in their Outlook. It can be set in Archive Manager Exchange Edition Enterprise Manager under **Manager view** / **Settings** tab / **Shortcut templates** and **Shortcut to user assignment**.

2.2 Entourage Installation

When installing Archive Manager Extension for Entourage, please use the EntourageAddin.zip file. It contains all necessary installation files for Entourage. Files from the zip (script files, the Archive Manager Search application and settings files) has to be copied to the user's home directories on the Mac. The process is described further.

2.2.1 Installing AppleScripts

The scripts "Archive Message show\cO.scpt", "Archive Message delete\cL.scpt", "Archive Message restore\cW.scpt" and „Archive Message search\cF.scpt" should be copied to the folder: "Documents/Microsoft User Data /Entourage Script Menu Items/" in the home directory.
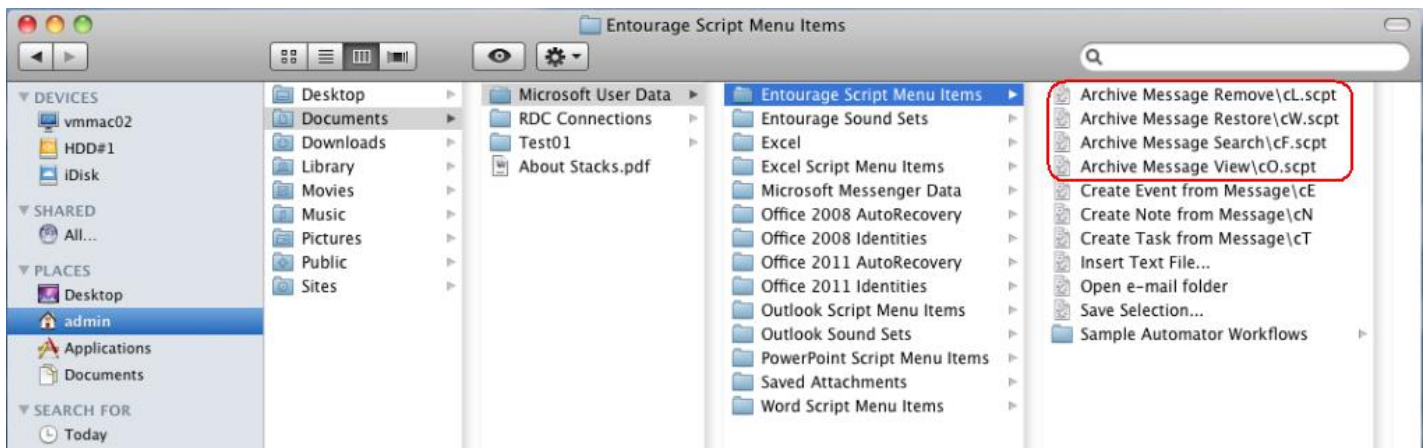

Figure 1: Entourage extensions by AppleScript

When starting Entourage you will get immediately 4 new entries in the Menu:
"Archive Message View", "Archive Message Remove", "Archive Message Restore" and "Archive Message Search".
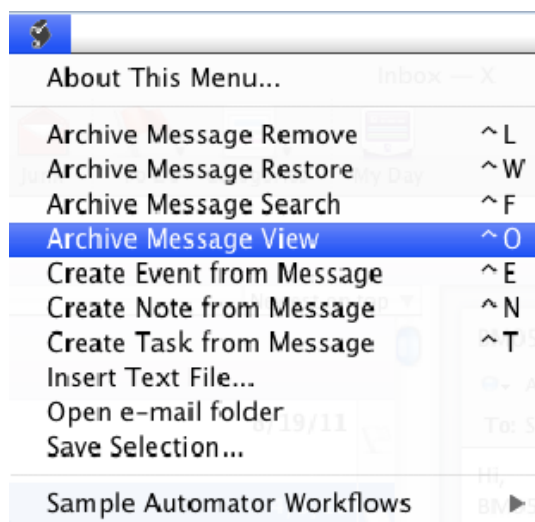

Figure 2: Menu

Manage, *Migrate*, *Archive*, *Store*, *Protect*

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ATTENTION: It is important that the Script file has "Skript"-Resource-Fork. Otherwise Entourage does not recognize the script so they will not appear in the Script Menu.
In case that the Resource-Fork has been lost, you can open the script with Scripteditor and save it once again.

2.2.2 Installing Fulltext Search

The Archive Manager Search (PAMFulltextSearch) is an executable file. It has to be copied in the "Applications/PAMEntourage" folder.
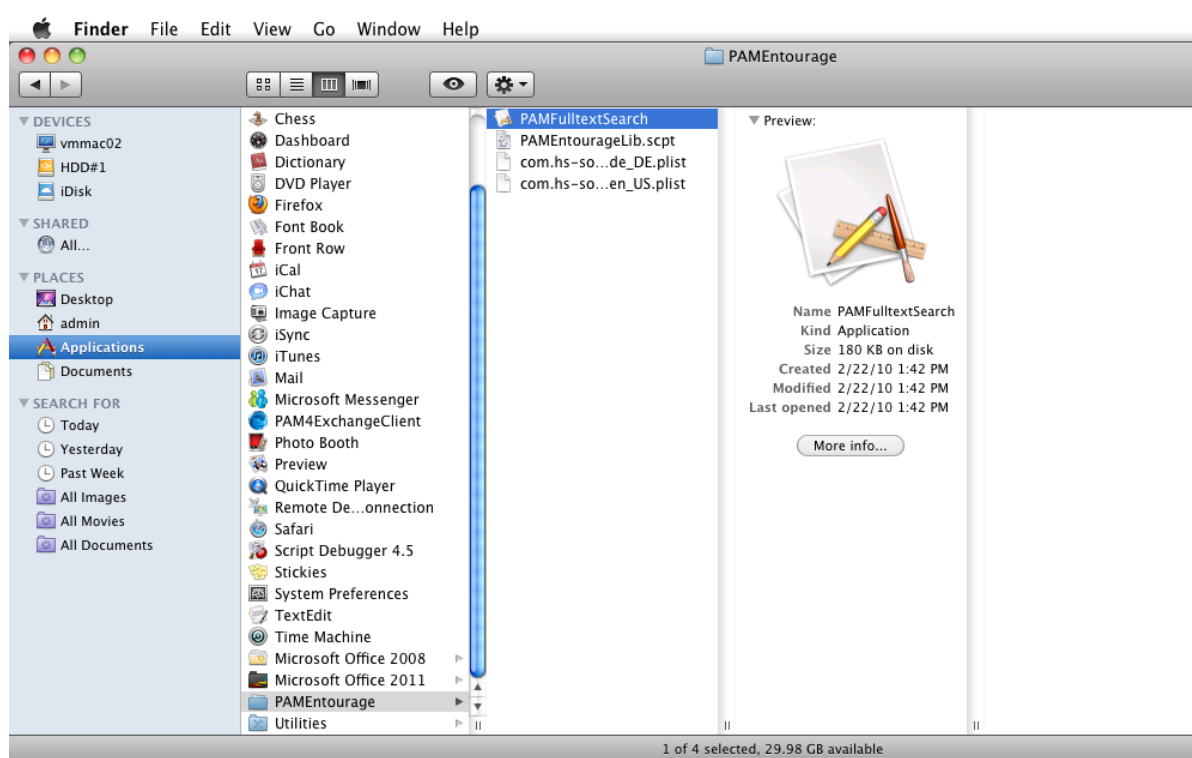
Figure 3: Applications folder for the Fulltext search

2.2.3 Installing the Settings file

The file "com.hs-soft.PAMEntourage.plist" contains the address of the Archive Manager server. This file can be edited and set up with "Property List Editor" or with a Text-Editor. The key "PAMServerAddress" has to contain the IP Address or the FQDN, e.g. "192.168.11.188" or "server.metalogix.com".

The Settings file "com.hs-soft.PAMEntourage.plist" has to be copied to the folder: "Library/Preferences/" in the user's home directory.
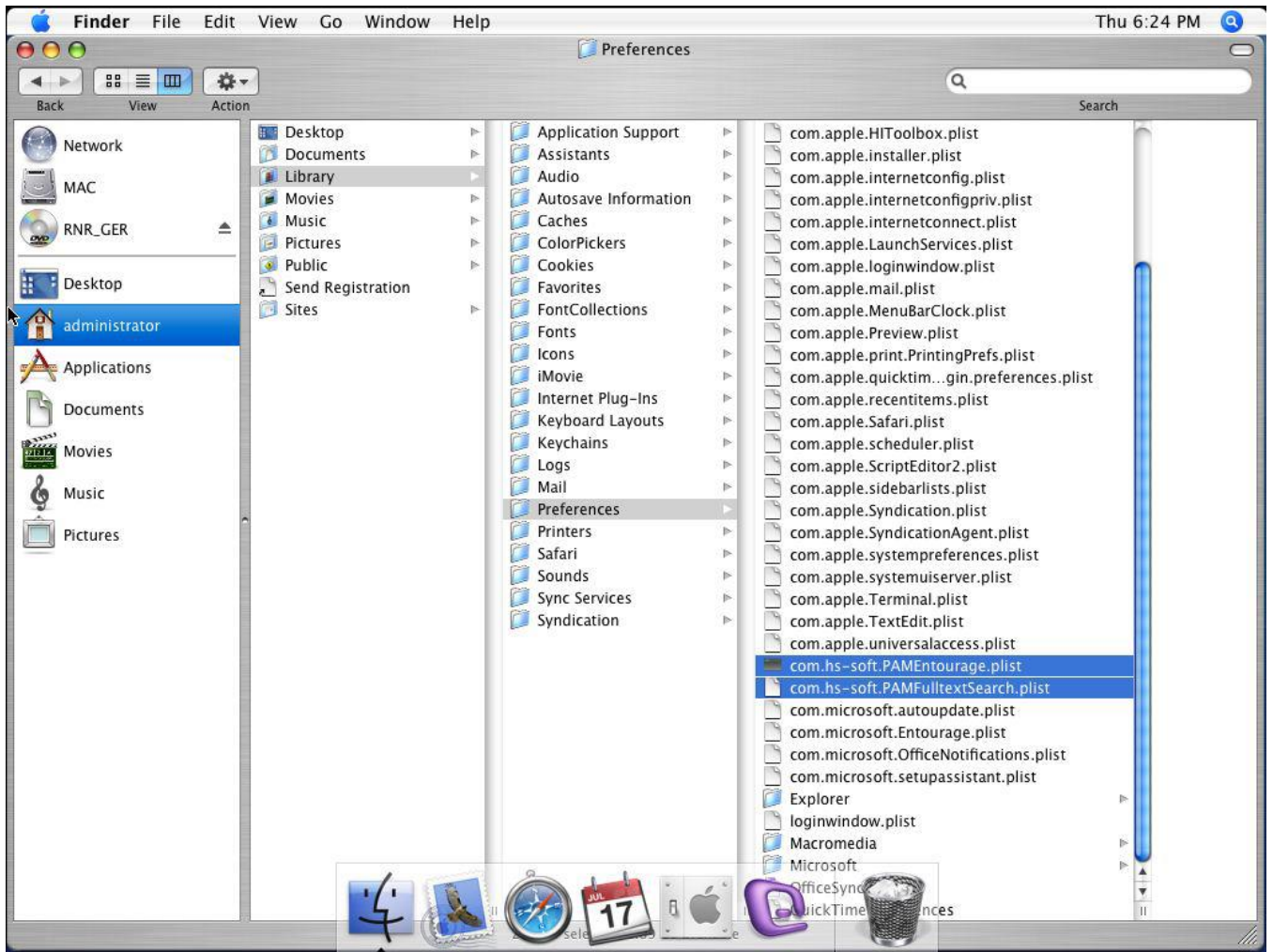
Figure 4: Preferences folder for the Settings file

3 Feature usage

It is not possible in the Outlook:Mac to change the icon for an archived item, i.e. you cannot distinguish between archived and non-archived items. It can be recognized in the preview pane.
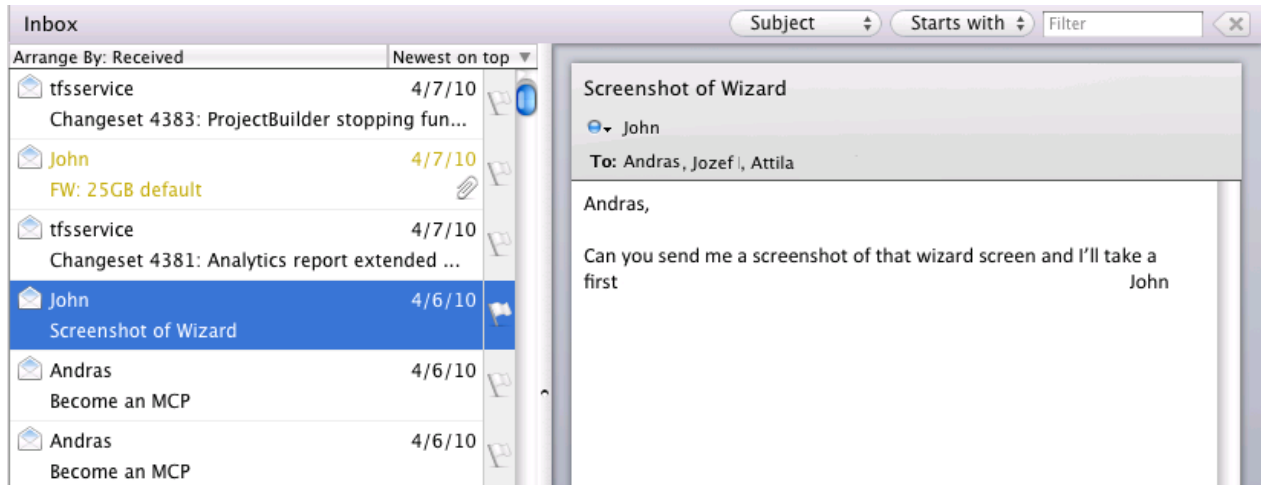
Figure 5: Non-archived message
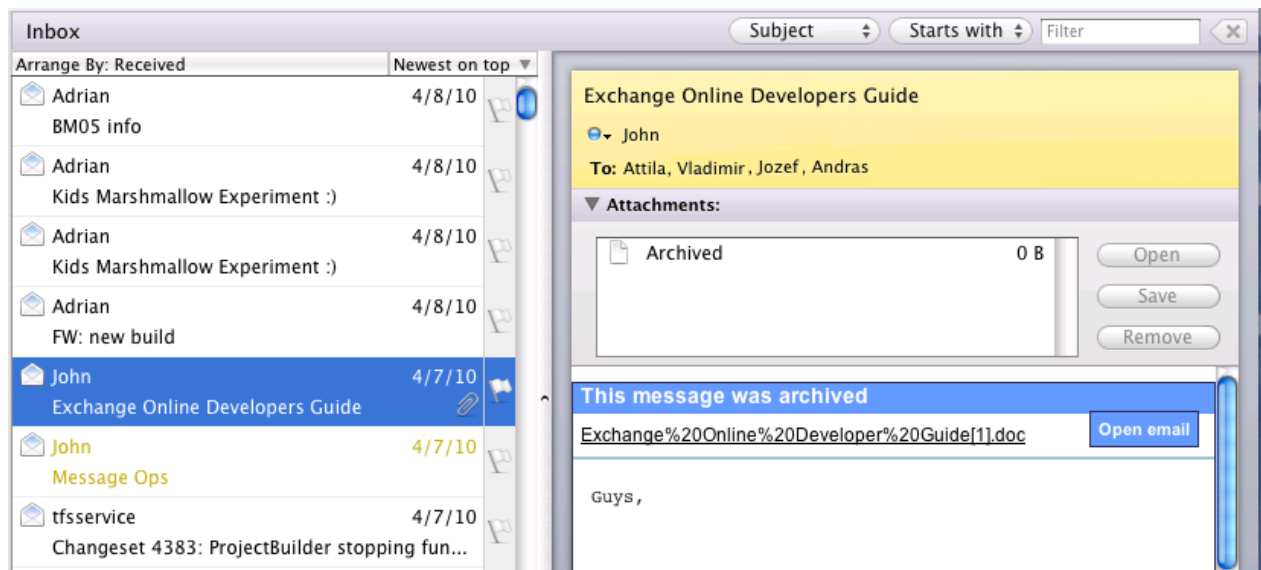
Figure 6: Archived message

3.1 Opening an archived item (retrieve)

An archived email in the Outlook:mac can be opened as any other email. Just double-click the email and a new window appears with the content of the archived item.
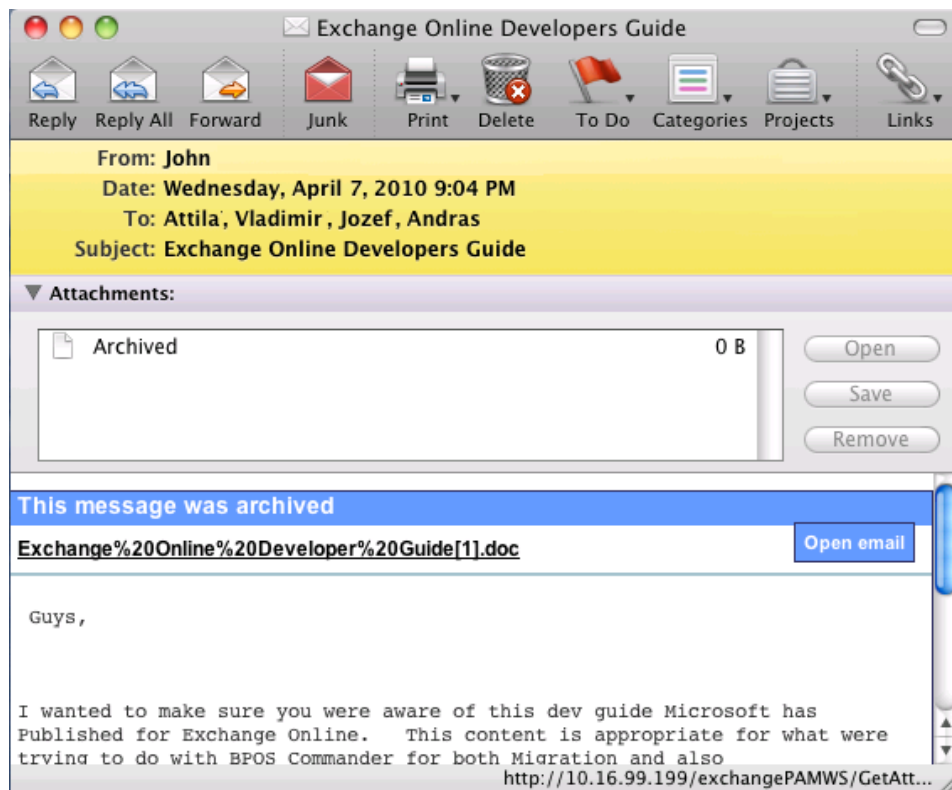
Figure 7: Opening an archived item

You can also open an archived email via menu command "Archive - Show Archived Message". If you select a non-archived message, you will get the following dialog window:
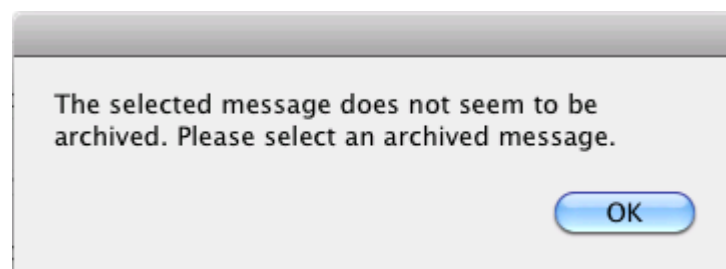
Figure 8: Error dialog

If choosing more messages for opening via menu command "Archive - Show Archived Message", only the archived messages will be shown.

3.2 Restoring of archived messages

Here you can select more messages, it does not matter if they have been archived or not. Of course, only mails the content of which can be found in the archive will be restored.
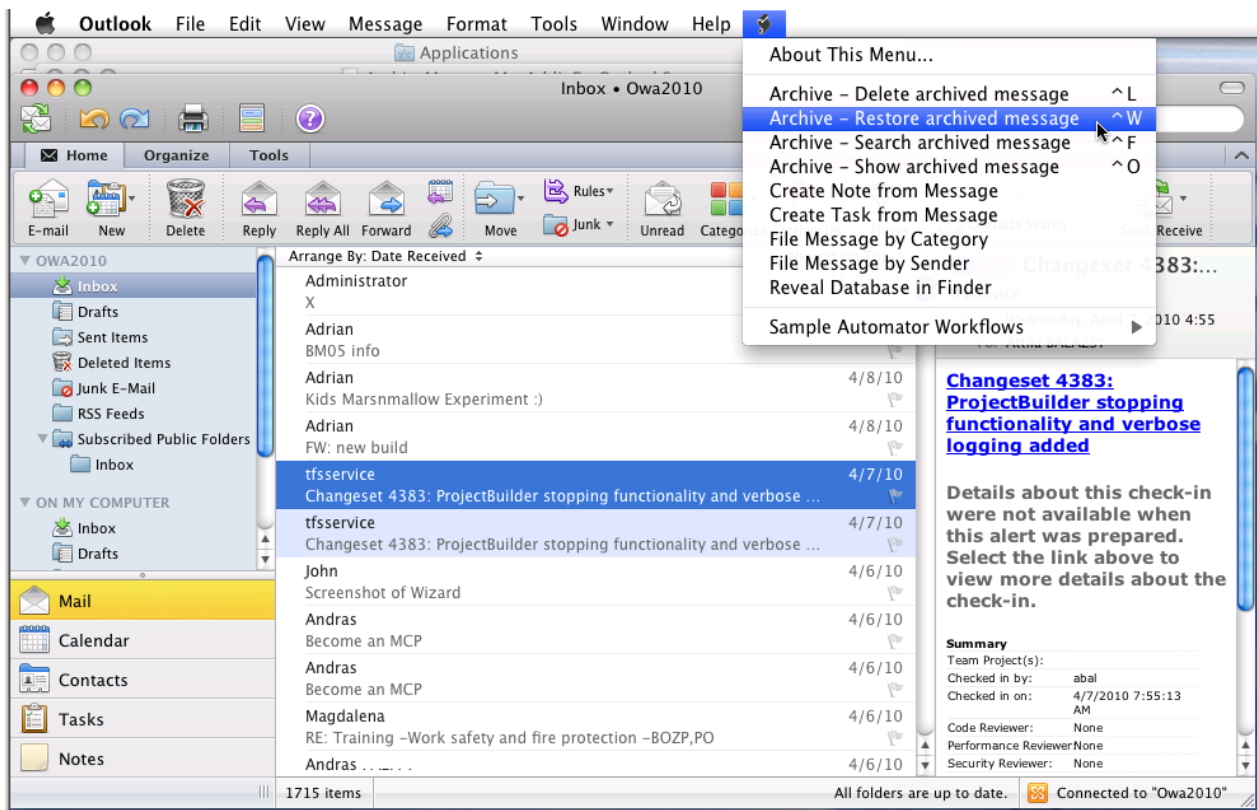
Figure 9: Starting the scripts for restoring

Before running the scripts, the user must confirm it once more. Please notice that the process of restoring can last a bit longer if restoring more messages at once. If you click the Cancel button, the process will terminate.
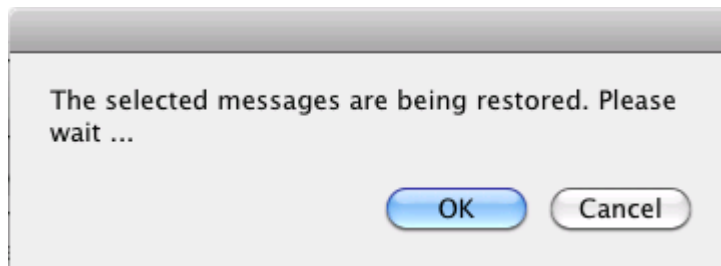
Figure 10: Confirming the restoring

When the desired messages have been restored, the user can see a status notification.
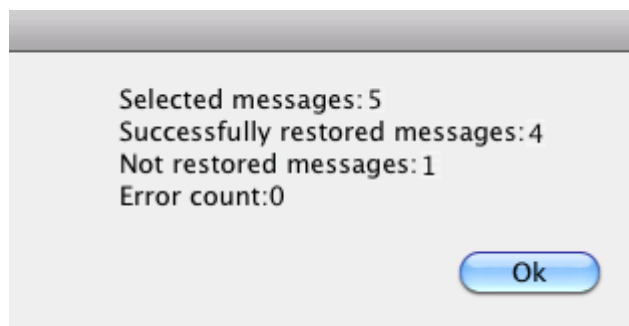
Figure 11: Status of the restoring process

When the messages are restored, they are displayed as new messages in Outlook:mac and the HTML-Shortcuts are deleted. However, the messages will not be deleted from the archive.

When restoring an archived message which has been moved in the mailbox, an error can occur. In this case "Detail" button appears in the status report window.

The Exchange-Server changes the identificator after every operation with the archived message. When the HTML-Shortcut is created this identificator is included as hidden field. Meanwhile it was changed, so we cannot restore the message with the old identificator. However, your administrator can repair the shortcut and the restore function will work again.
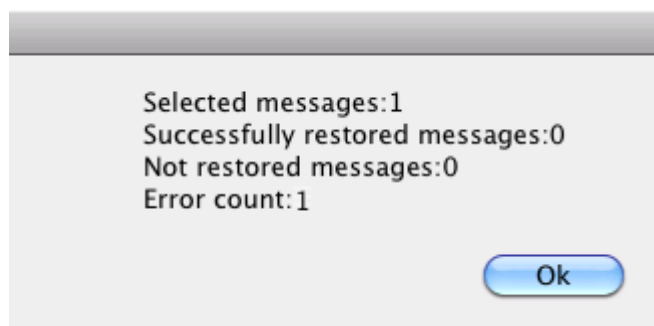
Figure 12: Error when restoring

By clicking on the **Details** button, the technical description of the error is displayed.
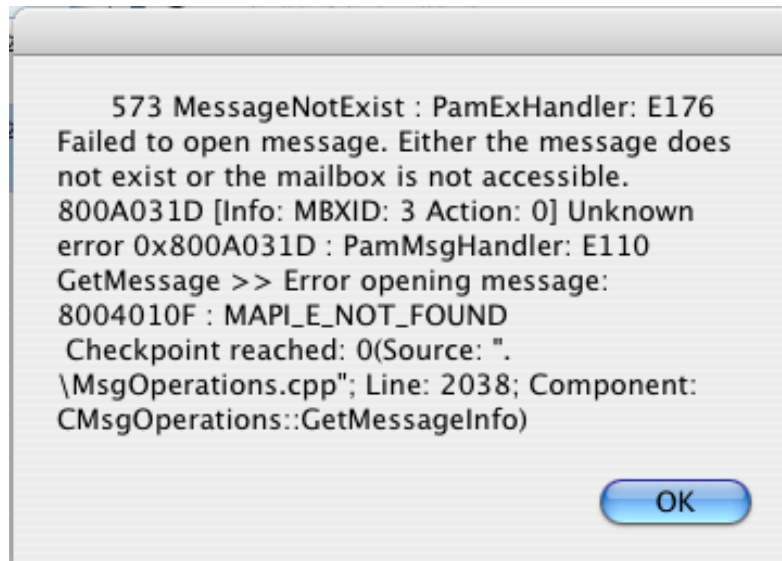
Figure 13: Technical error message

3.3 Deleting of archived items

More messages can be selected for this function and it does not matter if they are archived or not. However, only those mails will be deleted, which can be found in the archive.
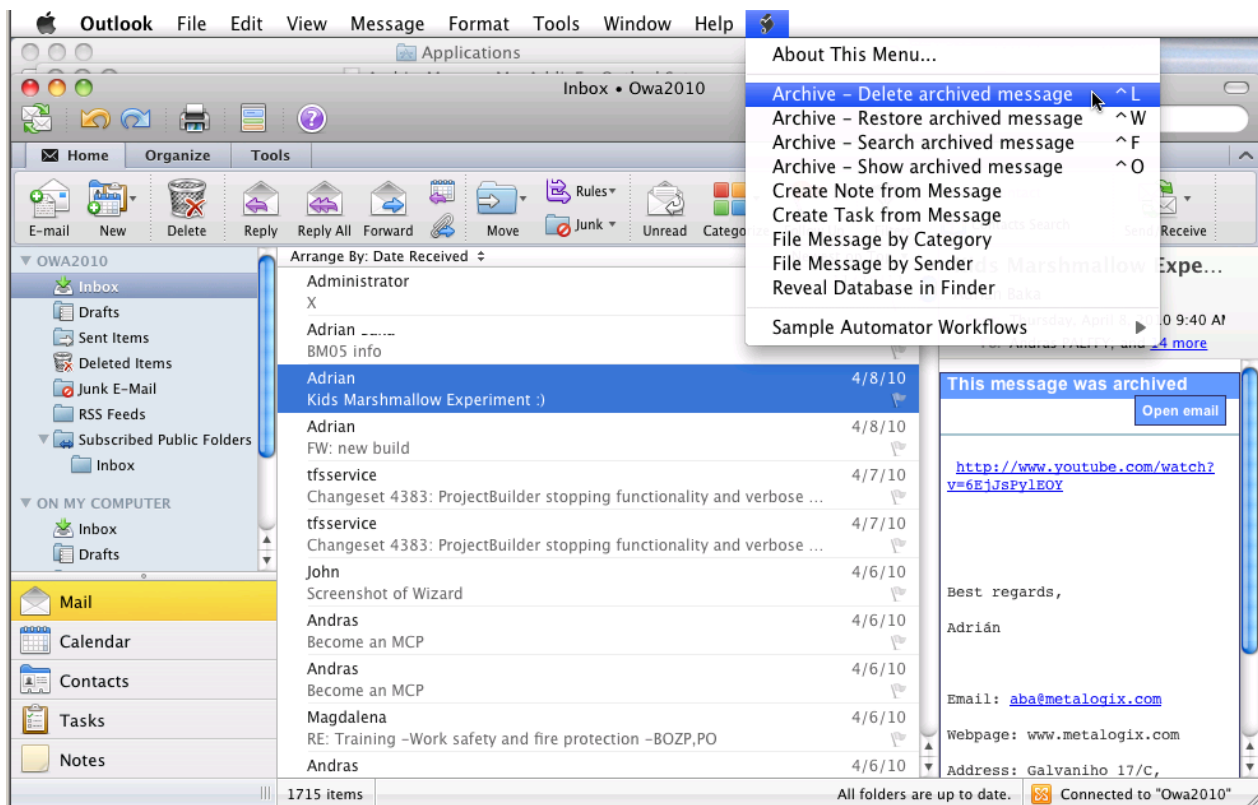
Figure 14: Deleting of messages

Before running the scripts, the user must confirm it once more. Please notice that the process of deleting can last a bit longer if more messages are deleted at once. To terminate the process, click the *Cancel* button.
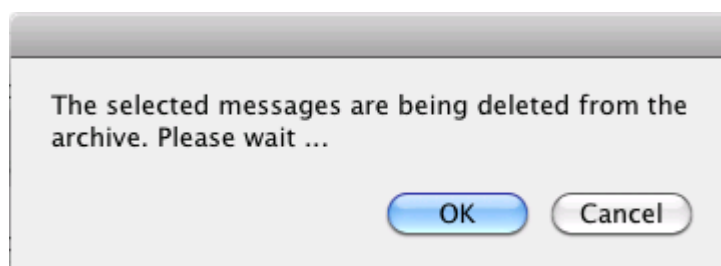
Figure 15: Confirming the deleting

As the messages and the HTML-Shortcuts are deleted, the user will get a status message.
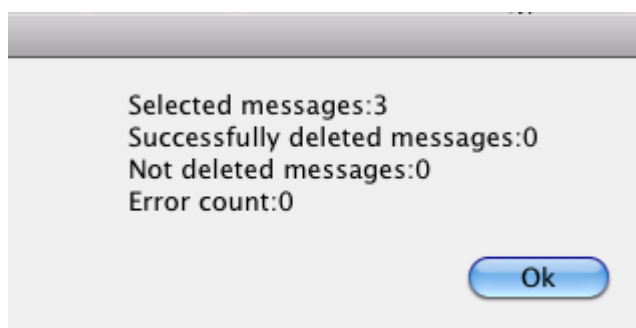
Figure 16: Status report after deleting

Outlook has the cache that saves only the most basic changes regarding the message, e.g. deleting. Moving which is also change in the email is not saved. This is the reason why messages being archived in the background still appear as non-archived.

All messages that are not displayed as HTML-Shortcuts are not deletable messages via this menu item.

In the case of deleting an archived message, which has been moved e.g. to different folder, the deleting of HTML-Shortcut does not work, because of the changed mail identificator. In this case the Detail button will appear in the window.
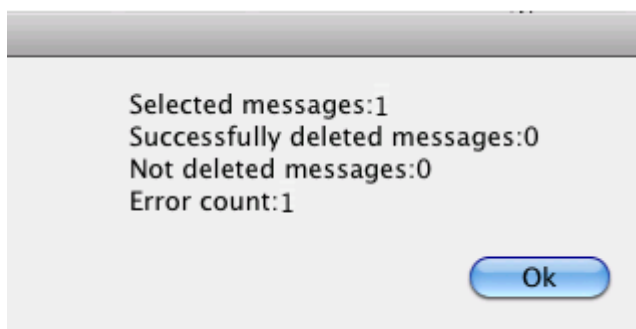
Figure 17: Error while deleting

After clicking on the Details button, you get the technical description of the error.
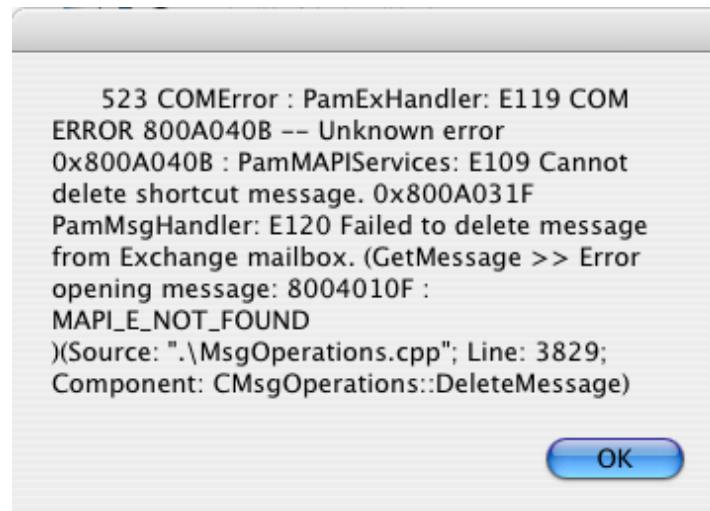
Figure 18: Technical error message

3.4 Fulltext search

Fulltext search is a very important tool, which helps us to search in the archived messages. It is possible to search not only in emails, but also in attachments (except pictures) if they are archived by Archive Manager Exchange Edition. It can search even in the emails which were restored or marked as deleted.

Like the other Archive Manager features, fulltext search can be started from the Scriptmenu as well.
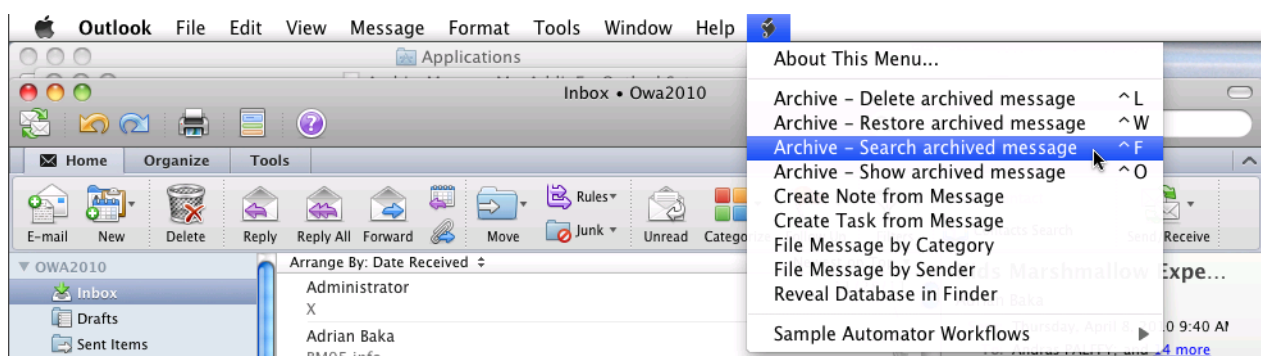
Figure 19: Starting the Fulltext search

After launching the fulltext search a window appears. Just enter the text and search for it. It searches in all the contents, i.e. in the emails and in attachments, too.
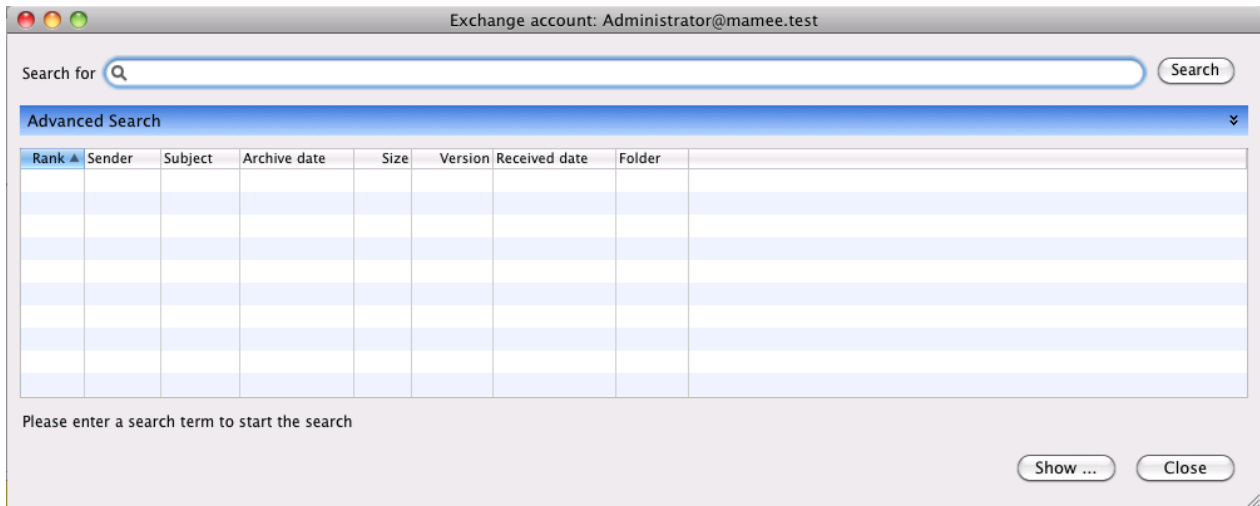
Figure 20: The fulltext search is ready

After filling in the text, the fulltext search can be launched by clicking on the **Show** button. As a result, you get the list of emails which contain the searched text. Open the mail by double-clicking.
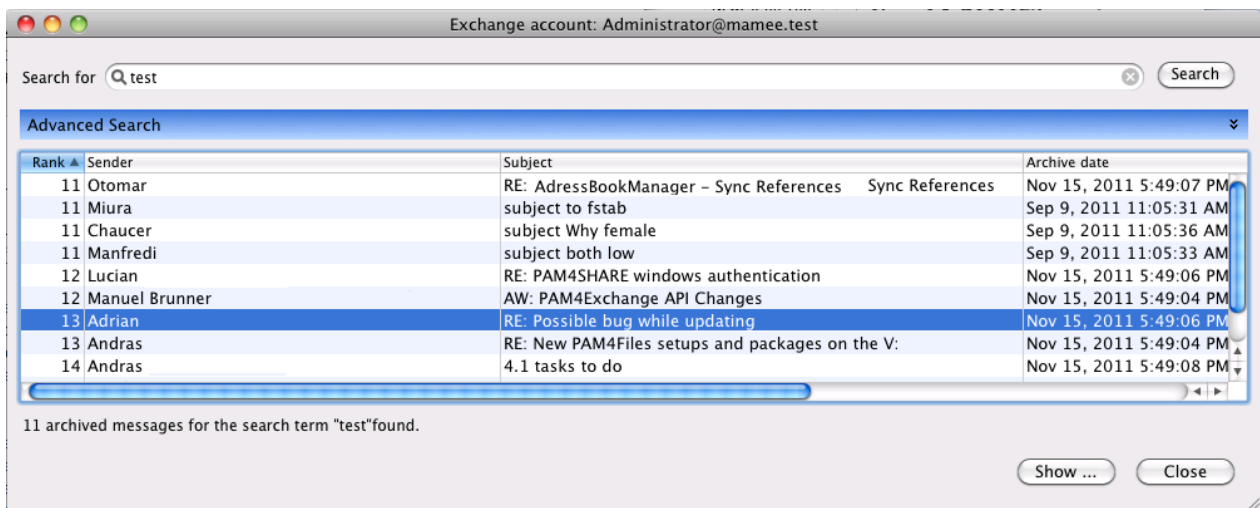
Figure 21: List of results
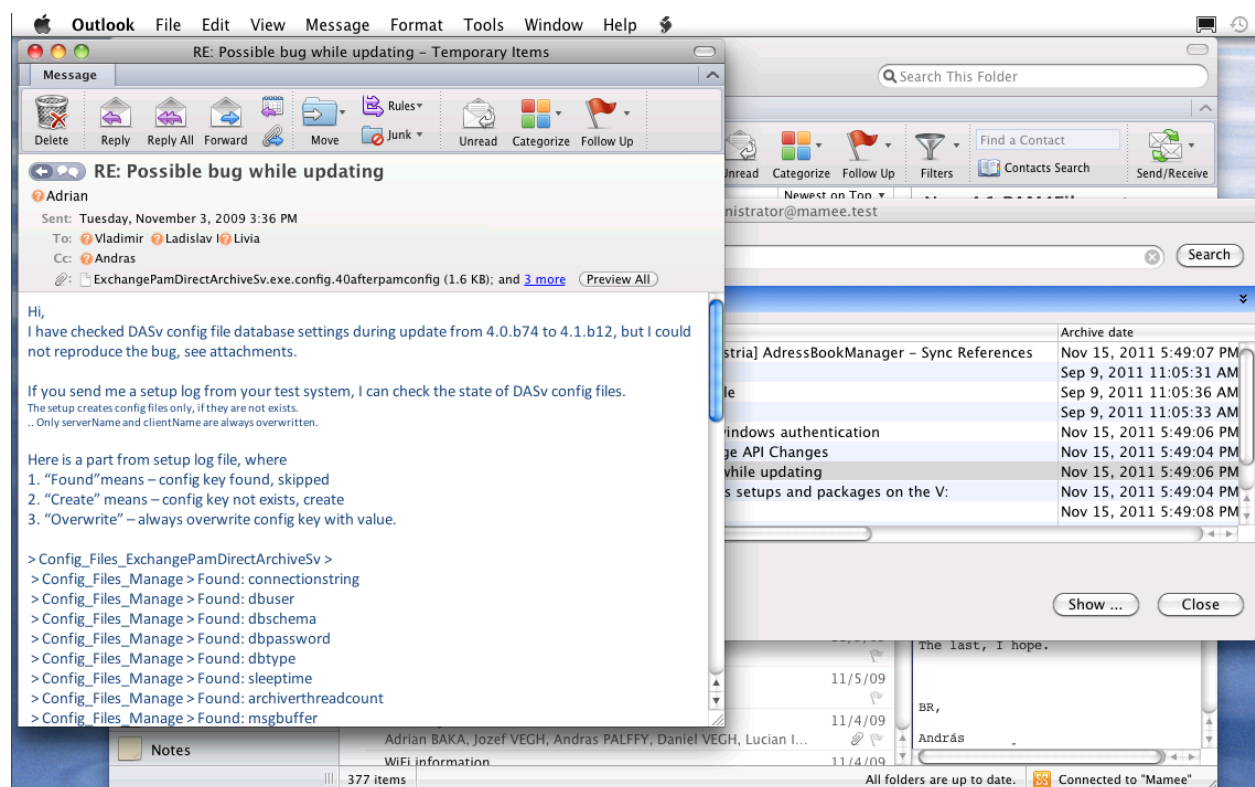
Figure 22: Showing the desired message

3.4.1 Advanced fulltext search

The entered words can be combined using logical operators AND, OR. The operator AND is not mandatory. In the case no logical operator is included, the full-text search query engine searches for documents containing all the given words.
Fulltext search is not case sensitive.

Example: search for 'test AND fulltext' is the same as search for the string 'test fulltext' or 'fulltext test'.

Archive Manager Search supports also other operators: NOT, "+" and "-". Single and multiple character wildcard searches are supported as well (for detailed information see Appendix).

Further advanced search options are available when the **Advanced Search** section is unfolded. Here it is possible to search in **Subject**, **From** and also **Recipients** fields.
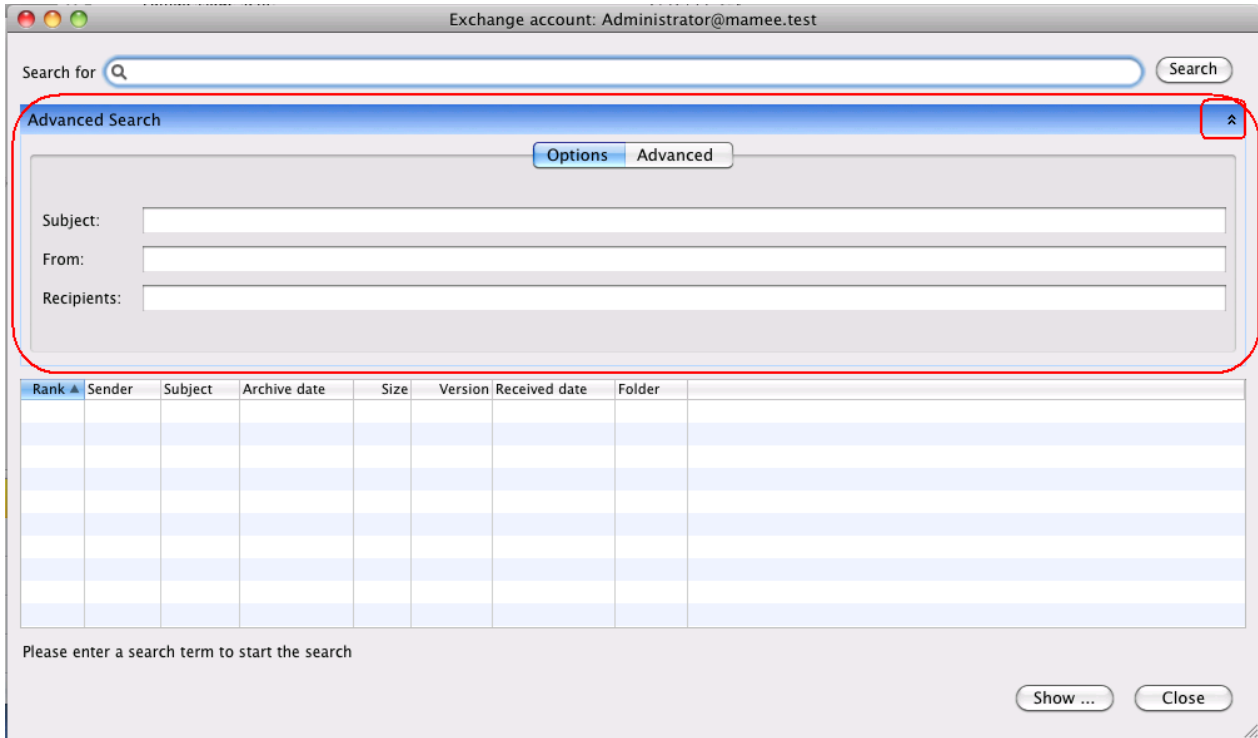
Figure 23: Advanced search section unfolded

Click **Advanced** button to enter more detailed search query specifications. In the **Field** dropdown menu select the desired specification. Then in the **Operation** and **Value** fields enter the details. When finished click **Add** to add the query specification to the search.
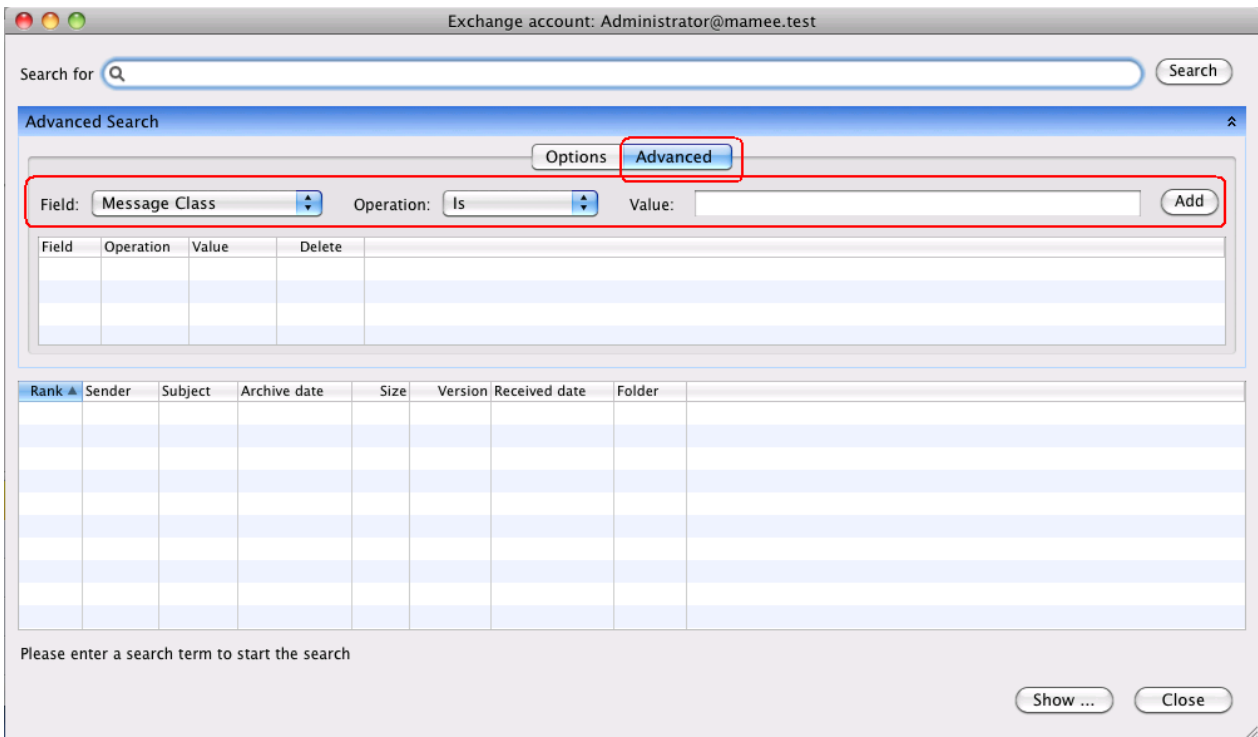
Figure 24: Detailed search query specifications

4 Appendix

4.1 Regular Expression Basic Syntax Reference

4.1.1 Terms

A search query can consist of terms and operators. There are two types of terms:

- **Single Term** is a single word such as "test" or "hello".
- **Phrase** is a group of words surrounded by double quotes such as "hello dolly" (the word order specified by the query is relevant).

Multiple terms can be combined together with Boolean operators to form a more complex query (see below).

4.1.2 Wildcard Searches

Archive Manager Search supports single and multiple character wildcard searches.

| Characters		
Character	**Description**	**Example**
?	single character wildcard; replaces any single character	te?t matches text, test etc.
*	multiple character wildcard; replaces 0 or more characters	test* matches test, tests, tester etc.

NOTE: The first 2 characters of the search phrase cannot contain any of the above mentioned wildcard specification characters, i.e. ? or *.

4.1.3 Boolean operators

Boolean operators allow terms to be combined through logic operators. Archive Manager Search supports AND, "+", OR, NOT and "-" as Boolean operators.
NOTE: Boolean operators must be ALL CAPS.

Characters		
Character	**Description**	**Example**
OR	links two terms and finds a matching document if either of the terms exist in a document. This is equivalent to a union using sets. The symbol || can be used in place of the word OR.	"test data" OR test searches for documents that contain either "test data" or just "test"
AND	It is the default conjunction operator. This means that if there is no Boolean operator between two	"test data" AND "test server"

	terms, the AND operator is used. The AND operator matches documents where both terms exist anywhere in the text of a single document. This is equivalent to an intersection using sets. The symbol && can be used in place of the word AND.	searches for documents that contain "test data" and "test server"
+	requires that the term after the "+" symbol exist somewhere in a single document	+test data searches for documents that must contain "test" and may contain "data"
NOT	excludes documents that contain the term after NOT. This is equivalent to a difference using sets. The symbol ! can be used in place of the word NOT Note: The NOT operator cannot be used with just one term. For example, the following search will return no results: NOT "test server".	"test data" NOT "test server" searches for documents that contain "test data" but not "test server"
-	excludes documents that contain the term after the "-" symbol	"test data" -"test server" searches for documents that contain "test data" but not "test server"

4.1.4 Grouping

Archive Manager Search supports using parentheses to group clauses to form sub queries. This can be very useful if you want to control the boolean logic for a query.

To search for either "test" or "server" and "data" use the query:
(test OR server) AND data

This eliminates any confusion and makes sure that "data" must exist and either term "test" or "server" may exist in the document.

4.1.5 Escaping Special Characters

Archive Manager Search supports escaping special characters that are part of the query syntax.

The current list special characters are: + - && || ! ( ) { } [ ] ^ " ~ * ? : \

To escape these character and suppress their special meaning use the "\" (backslash) before the character. For example to search for "(1+1):2" use the query:

\(1\+1\)\:2

5 Troubleshooting

Issue 1: There are no items in Entourage/Outlook script menu or no effect when they are selected.

Solutions:
- Check whether the script files are physically copied into the
    a) *[User Home] / Documents / Microsoft User Data / Entourage Script Menu Items* folder in case of **Entourage 2004/2008**
    b) *[User Home] / Documents / Microsoft User Data / Outlook Script Menu Items* folder in case of **Outlook 2011**

- Check whether the script files have the correct format. They should be editable using **AppleScript Editor** tool. By default the script files are the following:
    a) For Entourage 2004/2008
        - Archive Message Remove\cL.scpt
        - Archive Message Restore\cW.scpt
        - Archive Message Search\cF.scpt
        - Archive Message View\cO.scpt
    b) For Outlook 2011
        - Archive - Delete archived messages \cL.scptd
        - Archive - Restore archived messages \cW.scptd
        - Archive - Search archived messages \cF.scptd
        - Archive - Show archived messages \cO.scptd

- For an Entourage script if there's no effect when clicked, it must be opened in **AppleScript Editor** tool, then **compiled** and finally **saved**.

Issue 2: Retrieve doesn't work, an error message appears.

Solutions:
- Check the accessibility of the Archive Manager Web Service. Open the following URL in **Apple Safari** browser:
http://[ArchiveServerIP]:[Port]/exchangepamws/exchangepamws.asmx
Browsing the above URL should return the list of Web Service methods.

- Addin configuration file is missing, corrupt or it is not configured correctly
    a) For Entourage 2004/2008 check the following file:
    [User Home] / Library / Preferences / com.hs-soft.PAMEntourage.plist
    b) For Outlook 2011 check the following file:
    [User Home] / Library / Preferences / com.hs-soft.PAMOutlook.plist
    c) Check config keys and values for configuration files above. Server names must be here specified via **IP addresses**.

- Selected Entourage/Outlook item is **not an archived item**. By default an archived item has a shortcut on Exchange server which should have HTML body format. Check prerequisites and settings for archive server.

<u>**Issue 3:**</u> Restore doesn't work, an error message appears.

<u>**Solutions:**</u>
- Check the **Issue 2** troubleshooting solutions.

- Check whether the **Restoring** Addin permission is **Allowed** on the Archive server for the selected mailbox.

<u>**Issue 4:**</u> Delete doesn't work, an error message appears.

<u>**Solutions:**</u>
- Check the **Issue 2** troubleshooting solutions.

- Check whether the **Deleting** Addin permission is **Allowed** on the Archive server for the selected mailbox.

<u>**Issue 5:**</u> Fulltext search doesn't work or the Fulltext-Search application is not starting.

<u>**Solutions:**</u>
- Check the **Issue 2** troubleshooting solutions.

- Check whether the **Fulltext search** Addin permission is **Allowed** on the Archive server for the selected mailbox.

- Check fulltext-search application for Entourage 2004/2008 in *Applications / PAMEntourage* folder for the following items:
  - PAMFulltextSearch
  - PAMEntourageLib.scpt
  - com.hs-soft.PAMEntourage.LanguageResource_xx_YY.plist

- Check fulltext-search application for Outlook 2011 in *Applications* folder: The name is ArchiveManagerMacAddinForOutlookSetup by default.

www.metalogix.com
Mail Support: www.metalogix.com/Support