Enterprise Vault Outlook 2010 end user configuration (including Virtual Vault)

Hands-On Lab

Description
This lab will provide a hands-on opportunity to experience the archive industry’s leading end user interface. Configure and use Virtual Vault and see how end users can easily use this tool to access their archived messages with little or no training. Also see how Enterprise Vault integrates into the end users search experience meaning archived messages are just another content source that they can seamlessly search against.

This lab assumes a basic knowledge of Symantec Enterprise Vault and Microsoft Outlook 2010.

At the end of this lab, you should be able to
- Explain how Enterprise Vault integrates into Outlook 2010.
- Configure the Enterprise Vault Outlook add-in for Outlook 2010
- Configure and enable Virtual Vault.
- Explain how Virtual Vault integrates into Outlook 2010.
Notes

- A brief presentation will introduce this lab session and discuss key concepts
- You can perform this lab at your own pace
- Be sure to ask your instructor any questions you may have
- Thank you for coming to our lab session.

Setup Overview

Please ensure the virtual machines is started in the correct order as outlined below.

- VM_SERV1_x64 (DC, SQL, Exchange) - Start first. Log in as “admin”.
- VM_SERV2_x64 (EV Server)
- VM_CLIENT_x32 (Windows 7 Client)

<table>
<thead>
<tr>
<th>User Name</th>
<th>Password</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin</td>
<td>symc4now</td>
</tr>
<tr>
<td>Mike.Smith</td>
<td>symc4now</td>
</tr>
<tr>
<td>Vivian.Vance</td>
<td>symc4now</td>
</tr>
</tbody>
</table>

- If your VMware images are not already started in the lab, please reset to the “Start Here” snapshot before powering up the virtual machines.
- Start VMSERV1_x64 first, wait for the Windows Logon screen to appear and log in as “admin”. Allow the command-line startup script to complete before starting VM_SERV2_x64 and log in as user “admin”.
- Start the VM_CLIENT_x32 image.

Part 1 – Using Virtual Vault to access archived items

1. Logon to VM_CLIENT_x32 as user “Mike.Smith”.
2. Open Outlook.
   - Note: Mike Smith is a Virtual Vault user. This means that he doesn’t have any shortcuts in his mailbox. He uses Virtual Vault to access archived items instead.
   - Virtual Vault functionality is built into the standard Enterprise Vault Outlook Add-in package (MSI) installed on workstations, and is enabled via Enterprise Vault policy.
3. In the left-hand Outlook pane you should see the “Vault – Mike Smith” node. Expand the node.
4. Select Inbox in Virtual Vault. Note that when you click on items in the folder they display as standard emails with no change to icon or functionality.

5. Find an item with an attachment and open it. The attachment can be opened either via the preview or via the opened message.

6. Close the item. Now select another item and click reply button. Note that the full message is included in the reply including any attachments.

7. The same applies to forwarding items from Virtual Vault.
   Note how all user actions are performed on the full item, and the end user is not aware that the item is archived.

8. Click on the Inbox folder in Mike Smith’s Mailbox. Select an item, and drag it into the Virtual Vault Inbox folder.

9. Select the Inbox folder in Virtual Vault and show the message has been copied (archived). Open to prove it.
   At this point the item is waiting to be uploaded to the user’s archive on Enterprise Vault. The upload will take place automatically in the background.

10. Select the Outlook “File” tab and then select “Enterprise Vault” option in the backstage view.

11. Select the “Configure Vault Cache” option from the view. Select the “Details” tab
    Under Content Synchronization the “Items to archive” now shows 1 (the message we just dragged into the Virtual Vault).

12. Select the “Options” tab.
    Note the Background Processing setting on this tab where you are able to adjust the time to check for items that needs to be synchronized.

13. Select the “Virtual Vault” tab. If the user has access to other archives they can be added to display the Virtual Vault for those archives. Note that additional archives are provided with read-only access in Virtual Vault.

14. Now go back to the Details tab and click “Synchronize Now”.
    This will force a synchronization of the item we just dragged into the Virtual Vault, and may take a few minutes to complete in the lab environment.

15. Note that the number of items to archive is now 0. Click OK to close the window.

16. Click on Mike Smith’s Mailbox on the Inbox folder. Initiate an instant search by clicking on Search Inbox as indicated in the screenshot.

17. Search for the word “backup”.

18. Click on “Try searching again in all Outlook items”
19. Notice how the search found items in both the Mailbox and Vault for Mike Smith, as indicated in the From column, grouped by Data File.

20. Items found in the Virtual Vault and Mailbox are actionable as per normal Outlook functions, the archived items are transparent to the end user.

21. Now click on the Start menu and type the word “backup” in the search window. Results will show items that have been found in the file system, mailbox and Virtual Vault.

   Documents (4) 
   - Move_Archive.pdf
   - Monitoring_and_Reporting_Enterprise_Vault_Environments.pdf
   - Waupaca County RFP IT Disaster Recovery.pdf
   - Copy of Jan 1 2008 Oracle Pricelist EU.xls

   Microsoft Outlook (81)
   - CIO Record Management Guide
   - CIO record management guide.pdf (CIO Record Management G.
   - Old NetBackup Admin Guide

22. Click on the heading “Microsoft Outlook (81)”.

23. Note the locations in the Folder column, showing where items were found in both the mailbox and Vault. Open one of the items in Inbox (Vault - Mike Smith). Normal Outlook operations such as reply and forward can be applied to the archived item found in a search.

24. Log off Mike Smith

Part 2 – Using Shortcuts to access archived items

1. Logon to VM_CLIENT_x32 as user “Vivian.Vance”.

2. Open Outlook.
   Note that Vivian is a shortcut user and does not use Virtual Vault.

3. The older items in the Inbox will show the archived icon. Click on one of these items. Depending on the policy assigned to the user, the contents of the preview pane will vary – in this particular example the policy will show a link to open the archived item in a web browser, and the shortcut body is restricted to only show the first 350 characters.
4. Double-click and open a shortcut. The original item is retrieved directly from the Enterprise Vault server.

5. Perform Reply and Forward actions on the shortcut, notice how the original item is being used.

6. Right-click on an archived item and choose Delete. Depending on the policy assigned to the user they can choose to delete both the shortcut and the archived item.

7. Click on the Enterprise Vault ribbon tab. Click the Search Vaults button.

8. Perform simple search and open an archived item from the results page

The following 7 steps will demonstrate some of the enhancements offered in the EV 10.0.1 Outlook Add-in.

9. Click on Inbox in Vivian’s mailbox. Select a standard un-archived item in the inbox. On the Enterprise Vault tab, click on the drop-down menu under the “Store” button, and select “Store selected items”

10. Choose the appropriate retention category (Exchange Mailbox) and click OK.

11. After a short delay the item will change from a clock to an archived icon. The original item is now deleted from the mailbox, and replaced with a shortcut to the item stored in the Vault.

12. Now select another shortcut and click Restore.

13. Click on “Other Folder” and click on Change. Choose an alternative folder, or create a new folder to restore the item to. Confirm the original unarchived item was restored to the chosen folder.

14. Right-click on the Inbox folder, and select the Properties tab. Click on the Enterprise Vault tab. Click on Change.

15. Un-tick the “Use parent folder settings” checkbox. Note that it is possible to allow end users to adjust the retention category for folders, change shortcut behavior or prevent any archiving from taking place on that folder. Options on this page can be restricted or overridden by policies define by the administrator.
It is possible to move Vivian from being a shortcut user to using Virtual Vault. The following section will explain the process.

16. The first step in the process is to enable Virtual Vault for Vivian’s mailbox. Click on the File tab in Outlook and select Enterprise Vault.

17. Click on Configure Vault Cache.

   Vault Cache can be used to give access to shortcuts when offline but it is also used to present Virtual Vault in Outlook. Vault Cache is a mandatory requirement for Virtual Vault.

   Click on the Virtual Vault tab, and tick the box next to Vivian Vance. Click OK.

18. In the Outlook folder list, click on the Inbox folder in Vivian’s Vault. Archived items can now be opened from here instead of using shortcuts.

   Note: We can now educate Vivian that he can access all of his archived items via Virtual Vault and no longer needs shortcuts. Therefore we can do two things to change Enterprise Vault behavior; delete all shortcuts in his mailbox and stop creating shortcuts for any future archived items.

19. Log in on the EV server VM_SERV2_x64 as Admin.

20. Open the Enterprise Vault Administration Console.

   We are going to find the policies assigned to Vivian’s mailbox and modify them to a) delete old shortcuts and b) no longer create shortcuts for newly archived items.


22. Leave the search field blank and click Find.

23. Click Yes to the pop-up.

24. In the resulting list find Vivian Vance and make a note of:

   Exchange Policy: _______________
   Desktop Policy: _______________


26. Select the Shortcut Deletion tab. Select the “Delete Shortcuts in Folders” check box, and Click Yes to the warning box. Change the period to 1 day.

27. Now select the Archiving Actions tab.

28. Deselect the “Create shortcuts to archived items after archiving”.

29. Click OK to save the policy changes.


31. Right-click the Select the Exchange Mailbox Archiving Task for EV1 and choose properties.

32. Click on the Synchronization tab, and click Synchronize to push the updated mailbox policy to users. Click OK to close the window.
33. Now right-click on the Mailbox Archiving Task for EV1, and choose “Run Now”.
34. Select Shortcut processing from the drop down menu.
35. Click on “Select mailbox” -> Search for and choose Vivian Vance’s mailbox.
36. Switch back to the Client virtual machine.
37. Select the Inbox folder in Vivian’s mailbox. All shortcuts should now be deleted.
38. Click on the Inbox in the Virtual Vault.
39. All items are still in the archive and are accessible when the user is online or offline.

You have completed this lab exercise