# Symantec Enterprise Vault™

## Guide for Mac OS X Users

10.0

Symantec

# Symantec Enterprise Vault: Guide for Mac OS X Users

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Chapter 1

# Introducing Symantec Enterprise Vault

This chapter includes the following topics:


- About Enterprise Vault
- Prerequisite software for the Enterprise Vault Client for Mac OS X
- Installing the Enterprise Vault Client for Mac OS X
- About shortcuts to archived items
- About the Enterprise Vault toolbar and menu commands
- Entering your login details for Enterprise Vault
- Viewing and amending your Enterprise Vault login password
- How grouping similar folders in Outlook 2011 for Mac affects Enterprise Vault Client behavior


## About Enterprise Vault

Enterprise Vault archives the contents of all the folders in your mailbox to a special storage area that is called a *vault*. Enterprise Vault runs automatically and usually does its archiving at off-peak times. You may also be able to archive items manually.

Most administrators set up Enterprise Vault so that there is a shortcut in your mailbox to each archived item. You can access the archived item by clicking the shortcut and then clicking the Enterprise Vault toolbar buttons and menu commands.

# Prerequisite software for the Enterprise Vault Client for Mac OS X

You can install the Enterprise Vault Client for Mac OS X on any computer that meets the following requirements:

- Mac OS X version 10.5 (Leopard) through 10.8 (Mountain Lion).
- One of the following email clients:
  - Entourage 2008 version 12.1.5 or later
  - Entourage 2008 Web Services Edition
  - Outlook 2011 for Mac version 14.0.0 or later
- Safari version 3.2.1 or later.

The installer kit for the Enterprise Vault Client for Mac OS X is supplied as a disk image (`.dmg`) file.

# Installing the Enterprise Vault Client for Mac OS X

The installation package for the Enterprise Vault Client for Mac OS X is a standard disk image (`.dmg`) file that you can run in the normal way.

**To install the Enterprise Vault Client for Mac OS X**

1. Quit any applications that are running, as they might interfere with the installation.
2. Make sure that your computer meets the minimum system requirements.

3 Double-click the supplied `SymantecEnterpriseVaultClient.version.dmg` file.

The **Symantec Enterprise Vault Client** window appears.

4 Double-click **Symantec Enterprise Vault Client.mpkg** to start the installation.

5 Follow the on-screen instructions.

# About shortcuts to archived items

When Enterprise Vault archives an item, it normally leaves a shortcut to the item in your mailbox. This shortcut is a direct link to the archived item in a vault.

An archived item looks like any other item in your mailbox. For example, if the item is an email message, your email client displays the title of the original message, the date on which you received it, and the author.

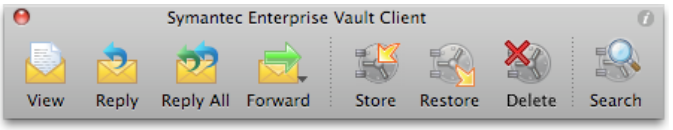
By clicking the Enterprise Vault toolbar buttons and menu commands, you can work with the items in your vault. You can also manually archive the items that Enterprise Vault has yet to archive.

# About the Enterprise Vault toolbar and menu commands

By default, after you install the Enterprise Vault Client, an Enterprise Vault toolbar appears when you start your email client. This toolbar provides facilities with

which you can store items in your archive, restore them, and interact with your archive in other ways.

**Figure 1-1** The Enterprise Vault toolbar




The following buttons may be available on the Enterprise Vault toolbar, depending on how your administrator has set up Enterprise Vault. Similar facilities may also be available on the Enterprise Vault Client application menu.

**Table 1-1** Enterprise Vault toolbar buttons and menu commands

| Toolbar button | Menu command | Description |
|---|---|---|
| – | Hide/Show Toolbar | Turns the Enterprise Vault toolbar on and off. |
| | View | Downloads the selected item from the vault and opens it in its original form.<br>See "Viewing an archived item in its original form" on page 13. |
| | Reply | Lets you reply to the sender of the selected item.<br>See "Replying to or forwarding an archived item" on page 14. |
| | Reply to All | Lets you reply to the sender and all recipients of the selected item. |
| | Forward | Lets you forward the selected item to one or more recipients. The forwarded item includes any attachments that arrived with the original item. |
| – | Forward as Attachment | Lets you create a new email message with the selected item as an attachment to it. |

**Table 1-1** Enterprise Vault toolbar buttons and menu commands *(continued)*

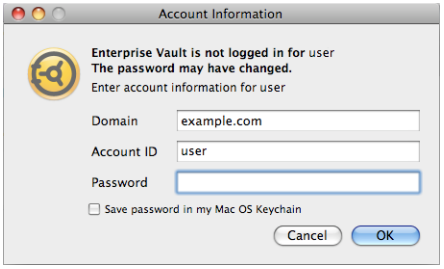
| Toolbar button | Menu command | Description |
|---|---|---|
| | Store in Vault | Archives the selected item when Enterprise Vault next performs an archiving operation on your mailbox.<br>See "Manually archiving items and folders" on page 15. |
| | Restore from Vault | Restores the item that is associated with the selected Enterprise Vault shortcut.<br>See "Restoring archived items from shortcuts" on page 15. |
| | Delete from Vault | Deletes the selected item from the vault.<br>See "Deleting archived items" on page 15. |
| | Search Vaults | Searches for archived items in the available vaults.<br>See "Searching for archived items" on page 16. |
| – | Login | Lets you submit your user credentials for communicating with the Microsoft Exchange server. |
| – | Enterprise Vault Preferences | Lets you set your preferences for the Enterprise Vault toolbar.<br>See "Customizing Enterprise Vault" on page 17. |
| – | Enterprise Vault Help Topics | Displays online Help for Enterprise Vault. |
| – | About Enterprise Vault | Provides version information on Enterprise Vault. |

# Entering your login details for Enterprise Vault

Before you can use the facilities on the Enterprise Vault toolbar and application menu, you may need to log in to Enterprise Vault.

**To enter your login details for Enterprise Vault**

1. On the Enterprise Vault Client application menu, choose **Login**.
2. In the Account Information dialog box, enter the credentials for your Microsoft Exchange account.




   Depending on how you have configured your Microsoft Exchange account, some of the fields in this dialog box may contain information that Enterprise Vault has retrieved from your email client.

3. Choose whether to save the password in your Mac OS X keychain.

   When the Enterprise Vault toolbar connects to the Exchange server, your keychain can provide the password so that you do not have to type it each time.

4. Click **OK**.

# Viewing and amending your Enterprise Vault login password

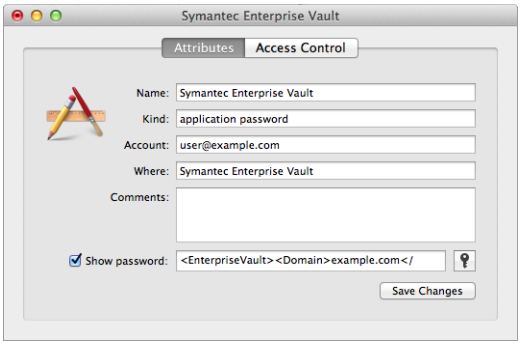
If you choose to save your password in the Mac OS X keychain when you first log in to Enterprise Vault, you can later view and amend the password by using the Keychain Access application.

**To view and amend your Enterprise Vault login password**

1. Open Keychain Access.
2. If keychains are hidden, choose **View** > **Show Keychains**.
3. Double-click the **Symantec Enterprise Vault** item.

4 Click **Show password**, and then enter the keychain password if you are asked for it.

Keychain Access displays your Enterprise Vault login password in the **Show password** field.




Note that Enterprise Vault stores your password in XML format, like this:

```
<EnterpriseVault>
  <Domain>domain_name</Domain>
  <UserId>user_id</UserId>
  <Password>password</Password>
</EnterpriseVault>
```

5 Amend the password, if necessary, and then click **Save Changes**.

# How grouping similar folders in Outlook 2011 for Mac affects Enterprise Vault Client behavior

Outlook 2011 for Mac lets you configure as many email accounts as you need, and, by default, it groups all the accounts' Inboxes under a single heading in the folder list. Outlook also consolidates Drafts, Sent Items, Deleted Items, and Junk E-mail folders. This feature can make it easier to read all your messages at once, but it affects the behavior of the Enterprise Vault Client in the following ways:

- You cannot log in to Enterprise Vault if you are working in an empty grouped folder or a grouped folder in which you have yet to select any items. You must select at least one item in the folder before you try to log in.
- While you work in a grouped folder, every button on the Enterprise Vault Client toolbar appears to be available. This is the case even if you have yet to

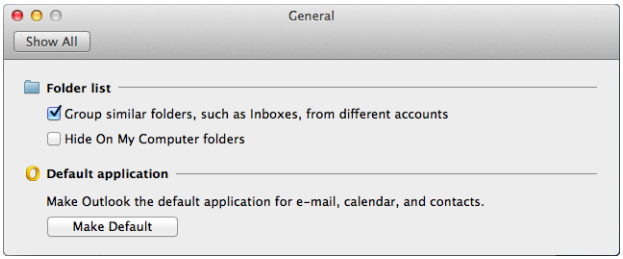
log in to Enterprise Vault and even if your administrator has set up Enterprise Vault to hide certain buttons on the toolbar.

- You cannot archive a grouped folder.

If this behavior causes you any issues, you may prefer to display separate folders for each email account.

**To display separate folders for each account**

1. On the **Outlook** menu, click **Preferences**.
2. Under **Personal Settings**, click **General**.
3. Under **Folder list**, uncheck **Group similar folders, such as Inboxes, from different accounts**.



Chapter 2

# Using Symantec Enterprise Vault

This chapter includes the following topics:


- Viewing an archived item in its original form
- Replying to or forwarding an archived item
- Manually archiving items and folders
- Restoring archived items from shortcuts
- Deleting archived items
- Searching for archived items
- Customizing Enterprise Vault
- Setting up a mailbox rule to manage your Enterprise Vault shortcuts
- Uninstalling the Enterprise Vault Client for Mac OS X


## Viewing an archived item in its original form

When Enterprise Vault archives an item, it may leave a shortcut in your mailbox. The shortcut is a direct link to the archived item in your vault. To retrieve an archived item and open it in its original form, follow the procedure below. This procedure does not restore the original item back to your mailbox.

### To view an archived item in its original form

1. Select the item that you want to view.
2. Click **View** on the Enterprise Vault toolbar or application menu.

   If the item is not immediately available, Enterprise Vault shows the shortcut contents instead. You can then choose to restore the item to your mailbox.

# Replying to or forwarding an archived item

If you want to reply to or forward an archived item, use the facilities on the **Enterprise Vault** toolbar or application menu to do so. Clicking the standard **Reply** and **Forward** buttons in your email client opens the shortcut for the archived item instead of retrieving and opening the original item.

If you use Outlook 2011 for Mac, note the following limitations on the Enterprise Vault **Reply**, **Reply to All**, and **Forward** facilities when you select more than one item at once in your mailbox:

- The **Reply** and **Reply to All** facilities are not available. You must select one item only to use these facilities.
- The **Forward** command on the Enterprise Vault Client application menu is not available. The **Forward** button on the toolbar is available but performs the same function as the **Forward as Attachment** option.

These limitations do not affect Entourage users.

### To reply to or forward an archived item

1. Select the items that you want to reply to or forward.
2. Click the appropriate option on the **Enterprise Vault** toolbar or application menu.

| | | |
|---|---|---|
| | Reply | Lets you reply to the sender of the selected item. |
| | Reply to All | Lets you reply to the sender and all recipients of the selected item. |
| | Forward | Lets you forward the selected item to one or more recipients. The forwarded item includes any attachments that arrived with the original item. |
| — | Forward as Attachment | Lets you create a new email message with the selected item as an attachment to it. |

# Manually archiving items and folders

Enterprise Vault performs automatic archiving in the background and does not require any action from you, but there may be occasions when you want to archive items manually. You can perform this operation if your administrator has set up Enterprise Vault to permit it.

**To archive items and folders manually**

1. Select one or more items or folders that you want to archive.

   Note that you cannot archive a complete mailbox.
2. Click **Store** on the toolbar or, on the Enterprise Vault Client application menu, choose **Store in Vault**.
3. If you want to archive a folder, choose whether to archive its subfolders as well.

# Restoring archived items from shortcuts

You do not normally need to restore items to your mailbox because you can easily open them by clicking the **View** button on the Enterprise Vault toolbar. If you do restore items, they are restored in their original form. For example, if a restored item is an email message, you can still reply as normal.

Enterprise Vault may take some time to restore any items that are stored offline.

If there is no shortcut to an item that you want to restore, use the Enterprise Vault Browser Search to find and restore the item.

**To restore archived items from shortcuts**

1. In your mailbox, select the shortcuts to items that you want to restore.

   Use the normal facilities in your email client to select single or multiple shortcuts. You can include any items that are not shortcuts; Enterprise Vault ignores such items.
2. Click **Restore** on the toolbar or, on the Enterprise Vault Client application menu, choose **Restore from Vault**.

# Deleting archived items

If your Enterprise Vault administrator has given you permission to delete items from a vault, there are several ways to do so. You can also delete archived items from within the Enterprise Vault search applications.

**To use shortcuts to delete archived items**

1. Select the shortcuts to the archived items that you want to delete.

   You can include any items that are not shortcuts. Enterprise Vault ignores such items.
2. Click **Delete** on the toolbar or, on the Enterprise Vault Client application menu, choose **Delete from Vault**.
3. Click **Yes** to confirm that you want to delete both the shortcuts and the archived items.

**To delete an item that you have opened from a shortcut**

1. Click **Delete** on the toolbar of the opened item's window.
2. Click **Yes** to confirm that you want to delete the item.
3. Choose to delete the shortcut only or both the shortcut and the archived item.

   If you delete the shortcut only, you can later perform a search to retrieve the item.

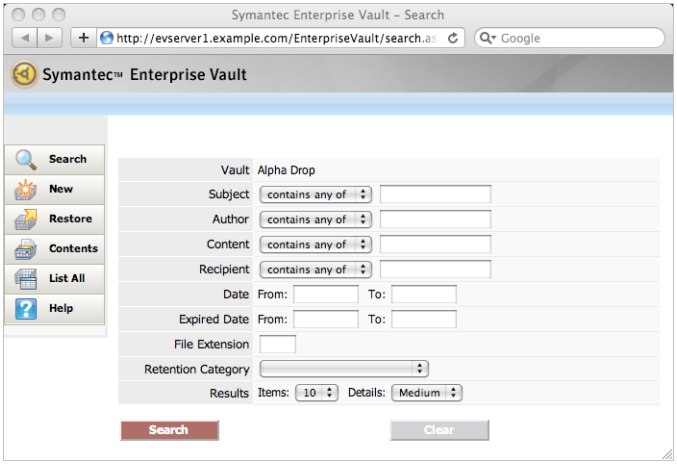
# Searching for archived items

If you have an Enterprise Vault shortcut to an archived item, you can easily use it to view or restore the item. However, if you do not have a shortcut, you can use the Enterprise Vault search facility.

**To search for archived items**

1. Click **Search** on the toolbar or, on the Enterprise Vault Client application menu, choose **Search Vaults**.
2. If Enterprise Vault prompts you for your logon details, type them and then click **OK**.

   If the logon dialog box does not have a separate **Domain** field, you must type your user name in the form *domain_name**user_name*.
3. Enter the search criteria, and then start the search.




# Customizing Enterprise Vault

You can customize the appearance of the Enterprise Vault toolbar by changing its horizontal or vertical orientation and hiding the text labels on it. You can also set your system preferences for Enterprise Vault, such as choosing whether to hide or show the Enterprise Vault Client application menu on the menu bar.

**To customize the appearance of the Enterprise Vault toolbar**

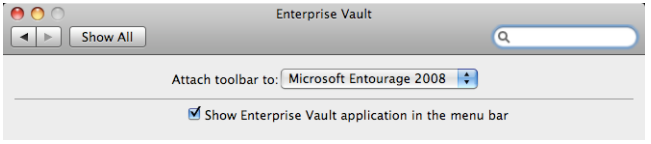
1 Click the settings icon at the top right of the Enterprise Vault toolbar.

2 Set the orientation of the toolbar to horizontal (**Wide**) or vertical (**Tall**), and choose whether to show the text labels on the toolbar.

3 Click **OK**.

**To set your system preferences for Enterprise Vault**

1 On the Enterprise Vault Client application menu, choose **Enterprise Vault Preferences**.




2 In the **Attach toolbar to** box, select the email client with which to associate the Enterprise Vault toolbar.

3 Check or uncheck **Show Enterprise Vault application in the menu bar**.

If you choose to hide the Enterprise Vault Client application menu, you can restore it later by clicking **Apple menu** > **System Preferences** and then clicking **Enterprise Vault**.

# Setting up a mailbox rule to manage your Enterprise Vault shortcuts

In the list of email messages in your mailbox, Enterprise Vault shortcuts look like unarchived messages. Shortcuts do not have a special icon or other identifying feature to make them more distinguishable. Therefore, to determine whether a message has been archived or not, you must open it or display a preview of it.

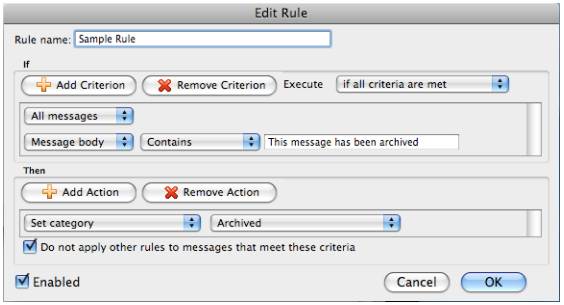
By setting up a mailbox rule, you can manage your shortcuts in ways that give them more prominence in the message list. For example, you can instruct the client to apply a color-coded category to each message that Enterprise Vault has archived. Then you can tell at a glance whether an email message is a shortcut or an unarchived message.

See the documentation that accompanies your email client for more information on how to perform the following steps.

### To set up a mailbox rule to apply color-coding to your shortcuts

1. Do one of the following:
   - If you use Entourage, point to **Categories** on the **Edit** menu and then click **Edit Categories**. Then click **New**.
   - If you use Outlook, click **Categorize** on the **Home** tab and then click **Add New**.
2. Create a category that is called, for example, "Archived", and choose a color to associate with it.
3. On the **Tools** menu, click **Rules**.
4. Click the **Mail (Exchange)** option if you use Entourage, or **Exchange** if you use Outlook.
5. Click the option to add a new rule.

   The **Edit Rule** dialog box appears.



6 Set up a rule that has the following characteristics:

| | |
|---|---|
| If this criterion is met | The message body contains the text in the banner of the shortcut (typically, "This message has been archived"). |
| Then take this action | Set the message category to the category that you created in step 2. |

7 Select all the items in the message list and then do one of the following:

- If you use Entourage, point to **Apply Rule** on the **Message** menu and then click the name of your rule.
- If you use Outlook, point to **Rules** on the **Message** menu, and then click **Apply** and the name of your rule.

# Uninstalling the Enterprise Vault Client for Mac OS X

When you have no further use for the Enterprise Vault Client for Mac OS X, you can uninstall it.

### To uninstall the Enterprise Vault Client for Mac OS X

1 In the Finder, browse to the following folder:

```
/Library/Application Support/Symantec Enterprise Vault
```

2 Run the `UnInstaller.app` application.

3 Open Keychain Access.

4 If keychains are hidden, choose **View** > **Show Keychains**.

5 Delete the **Symantec Enterprise Vault** item.