



Administrator Guide for Archiving
modusCloud

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Archive

In this chapter, you'll find the following topics:

- Configuring modusCloud Archive
- Using the Archive

Configuring modusCloud Archive

The modusCloud Archive leverages the journaling capability included in Microsoft Exchange. When enabled, journaling records a copy of all internal and external email communications for your company and sends them to a dedicated mailbox on an Exchange Server. modusCloud supports Envelope Journaling only on Microsoft Exchange Server 2007 and 2010.

Journaling copies the body of an email message and its transport envelope information (P2 header). The envelope information includes the sender and all recipients, including BCC recipients and recipients in distribution lists. Envelope journaling presents the information in a usable format so that the modusCloud Archive can retrieve the enveloped message and place it in the archive whereby it can then be subjected to the search and discovery functionality required.

This guide assumes you have Journaling configured for the Exchange Server in question. For more information on Journaling configurations see:

[http://technet.microsoft.com/en-us/library/aa997525\(EXCHG.65\).aspx](http://technet.microsoft.com/en-us/library/aa997525(EXCHG.65).aspx)

To confirm archive is enabled:

1. Click on the Company Settings tab.
2. Click on the Features tab.
3. Ensure Enable modusCloud Archive checkbox is enabled.
4. Click Save.

Once the modusCloud Archive has been enabled you now need to add a Microsoft Exchange Server to start archiving email.

To add MS Exchange Server

1. Click on the Archive tab.
2. Click on the Cog button in the top right hand side of the screen.
3. Navigate to the MS Exchange Servers section.
4. Click on Add New Connection.
5. Enter details about your environment.
 - *Server Name: The IMAP host name that modusCloud should connect to.*
 - *Port: The value should be 143 (IMAP).*
 - *SSL Port: The value should be 993 (IMAP over SSL).*
 - *Username: This account that should have permissions to access the journal account.*
 - *Password: The password that belongs to the account.*
 - *Connection Mode: Select SSL.*
6. Click Save.

To test MS Exchange Server instance:

1. Click on the Archive tab.
2. Click on the Cog in the top right hand side of the screen.
3. Navigate to the MS Exchange Servers section.
4. Click Test.

To edit an MS Exchange Server instance:

1. Click on the Archive tab.
2. Click on the Cog in the top right hand side of the screen.
3. Navigate to the MS Exchange Servers section.
4. Click Edit.

To stop MS Exchange Server instance:

1. Click on the Archive tab.
2. Click on the Cog in the top right hand side of the screen.
3. Navigate to the MS Exchange Servers section.
4. Click Stop.

To delete MS Exchange Server instance:

1. Click on the Archive tab.
2. Click on the Cog in the top right hand side of the screen.
3. Navigate to the MS Exchange Servers section.
4. Click Delete.

To verify connectivity to MS Exchange Server:

1. Click on the Archive tab.
2. Click on the Cog in the top right hand side of the screen.
3. Navigate to the MS Exchange Servers section.
4. Locate the Active icon (checkmark).

A “checkmark” identifies proper connectivity with the MS Exchange Server. An “X” identifies a connectivity issue with the MS Exchange Server.

Using the modusCloud Archive

Once the modusCloud Archive has been enabled and an MS Exchange Server has been added successfully the archive will automatically start to collect emails from the remote server.

Who can search the archive?

Organization administrators have permission to search the archive for all users across the company. End users have permission to search their own archive. This means they can only search emails where they are the sender or a recipient (either directly or as a member of a group).

To search the archive:

1. Click on the Archive tab.
2. Enter the appropriate criteria for your search.
 - *Date / From: Select the FROM date of the range you are interested in. Date / To: Select the TO date of the range you are interested in.*
 - *Date Type: Choose either send date, received date or archived date.*
 - *Search By: Choose the location of the message area you wish to search; includes: Subject, Body, To, From, CC, BCC, attachment body, and attachment name.*
 - *Matches: Choose the relationship between the terms defined; includes: Any of these words (OR), All of these words (AND), and None of these words (NOT).*
3. Click Search.

Viewing Search Results

Once you perform a search the system will execute the criteria against your archived data and return search results to the screen. You can further refine search criteria if necessary. There is a 1,000 record limit for search results.

Search results are displayed in a table and detailed information about each message is displayed including:

- Size (Kb)
- Sent date
- Received date
- Archive date
- From
- To
- Subject

To view a message:

1. Click on the **View** link next to the message in question.

To download a message:

1. Click on the **Download** link next to the message in question.

Downloaded emails are in EML format.

When viewing a message you can perform multiple actions for the message in question.

To view the list actions:

1. Click on the Actions drop down.
2. Select desired Option.

Redeliver

Provides users with the ability to have an archived email submitted to the modusCloud email relay service for redelivery to each of the messages original recipients. The email will show up in the inbox of the original recipients in a matter of moments.

Forward to

Provides users with the ability to have an archived email forwarded to a desired email address. The email will show up in the inbox as an attachment from the modusCloud Archive system.

Export

Provides users with the ability to have an archived email exported in an email format, which can then be managed by a Microsoft Outlook client as desired.