Netmail Search for Outlook® 2010
Quick Reference Guide

Messaging Architects™

Netmail Search is an easy-to-use web-based electronic discovery tool that allows you to easily search, sort, retrieve, view, and manage your archived items. The tool offers advanced search features and allows you to build your own customized searches, meaning you're never limited to default search criteria.

Accessing Netmail Search

Netmail Search can be accessed through your Outlook client or Outlook Web App account.

To access Netmail Search through your Outlook client:

1. Log in to your Outlook client.

2. In Outlook, click the **Add-Ins** tab.

3. On the **Add-Ins** tab, select **Netmail Archive** from the dropdown. The Netmail Search archive overview screen is displayed directly in your Outlook client. To return to your mailbox, simply click the **Inbox** folder.

To access Netmail Search through Web App:

1. In your web browser, navigate to your Outlook Web App login screen, and log in to your Outlook Web App account.

2. In your Outlook Web App mailbox, click the **Netmail Archive** link located in the lower left-hand side of your screen. You're redirected to Netmail Search, and your archive overview is displayed. To return to Outlook Web App, simply log out of Netmail Search, and you'll be redirected back to Outlook Web App.

Add-Ins tab

Netmail Archive dropdown

Netmail Archive link
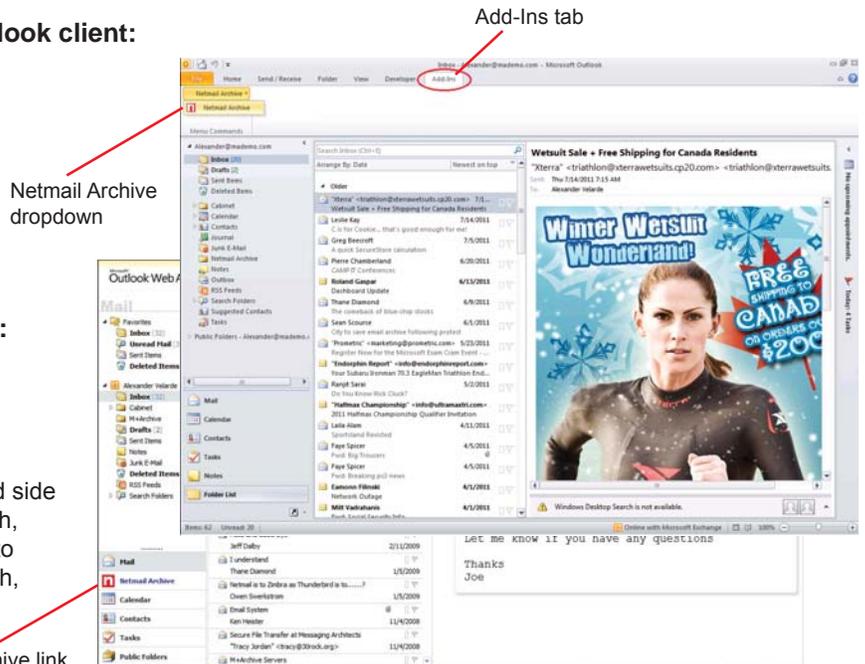
Netmail Search Archive Overview

The main Netmail Search screen presents an overview of your archived messages. From here, you can select, view, and manage your archived messages. By default, three mail window panes appear on the screen: **Folder view**, **Filter view**, and **Message view**.

Folder view
Lists the archive stores in which your archived data is located.

Filter view
Lists the available filters you can use to narrow down the data shown in your message view. When you apply these filters, only those messages selected through the filters are shown in the message view.
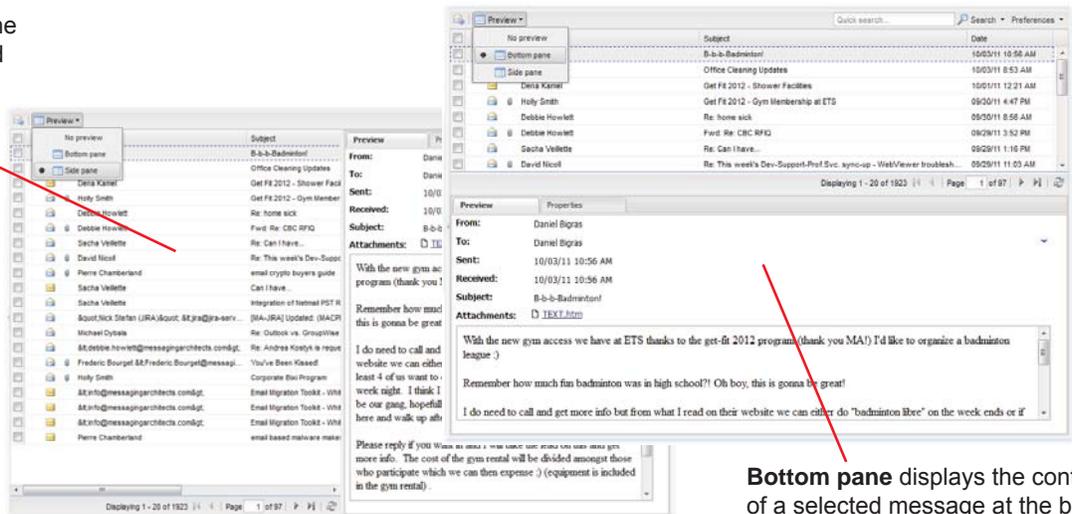
Message view
Is the main portion of the archive overview. It provides a list of all your archived messages.
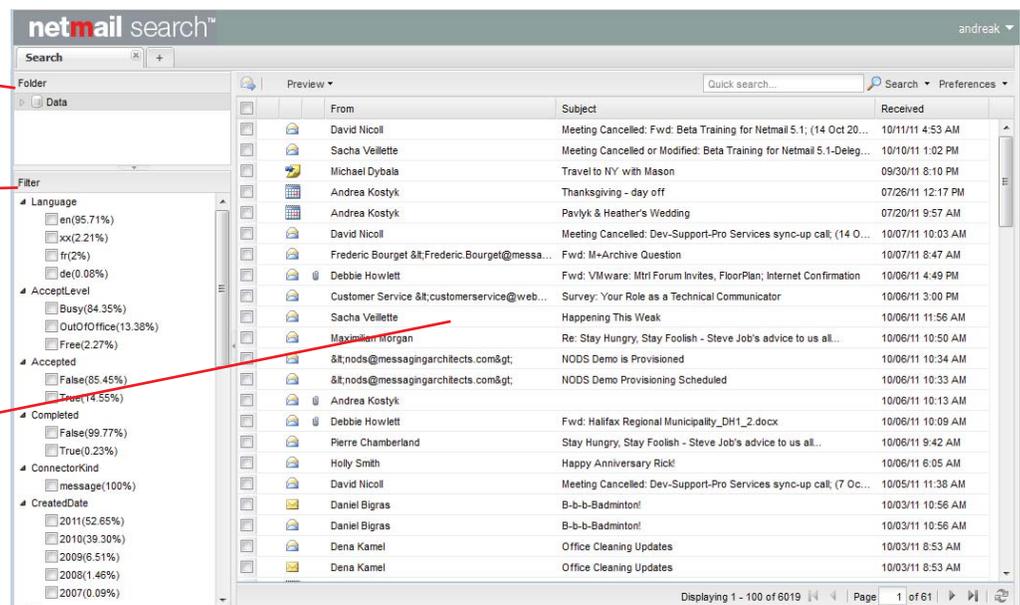
Previewing Messages

The default message view simply lists the messages located in your archive. You can, however, choose to preview individual messages within the message view. To preview messages, click **Preview**, and select either **Bottom pane** or **Side pane** from the dropdown list.

Side pane displays the contents of a selected message on the right side of the screen.

Bottom pane displays the contents of a selected message at the bottom of the screen.

Both the **Bottom pane** and **Side pane** views display two tabs: the **Preview** tab and the **Properties** tab.

Properties tab displays the main properties of the selected message, such as the message ID, the message type, the sender's name, the message subject, the number of attachments, etc.
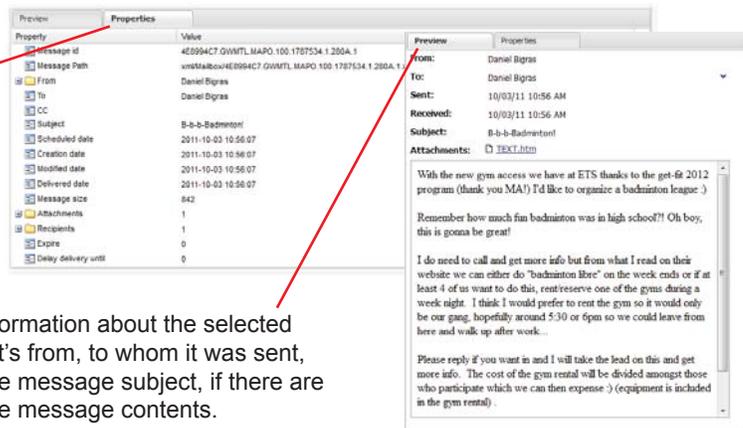
Preview tab displays information about the selected message, such as who it's from, to whom it was sent, when it was received, the message subject, if there are any attachments, and the message contents.

Sorting Messages

To sort your displayed messages in alphabetically ascending or descending order, position your mouse over a column heading, click the arrow, and select either **Sort Ascending** or **Sort Descending** from the dropdown list. Alternatively, you can simply click the column heading to toggle between sorting the messages in ascending order or descending order.
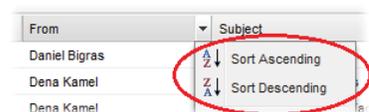
Displaying Columns

To select what columns you want displayed in the message view, position your mouse over a column heading, click the arrow, select **Columns**, and choose the columns you want displayed in the message view.
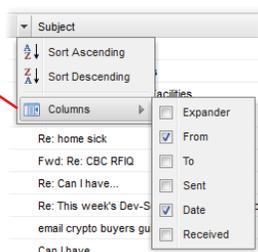
Expander: Adds a **+** icon next to each message. Click the icon to expand the message to reveal its contents.
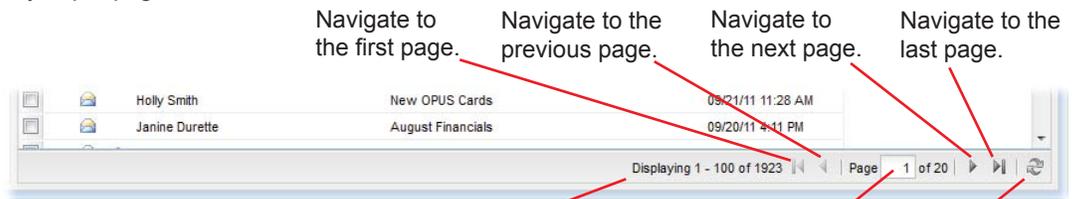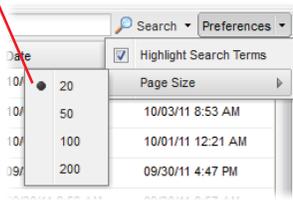
From: Displays who sent the message.

To: Displays to whom the message was sent.

Sent: Displays the date and time when the message was sent.

Received: Displays the date and time the message was received.

Selecting Page Size

To select the number of messages displayed on each page in the message view, click **Preferences** > **Page Size**, and select the number of messages you want displayed per page.

Navigate to the first page.

Navigate to the previous page.

Navigate to the next page.

Navigate to the last page.

Shows the range of messages currently being displayed and the number of messages there are in all.

Shows which page of messages is being displayed and the total number of pages.

Refresh the current page view.

Performing Actions on Messages

Once you have populated the message view with the list of messages you want to view, you can perform specific actions on the messages. More specifically, you can open, forward, and print messages.

Opening a Message

To open a message and view its contents in a separate dialog box, simply double-click it.

Just as with the **Bottom pane** and **Side pane** views, the **Preview** and **Properties** tabs are available. You also have the option of forwarding and/or printing the message.
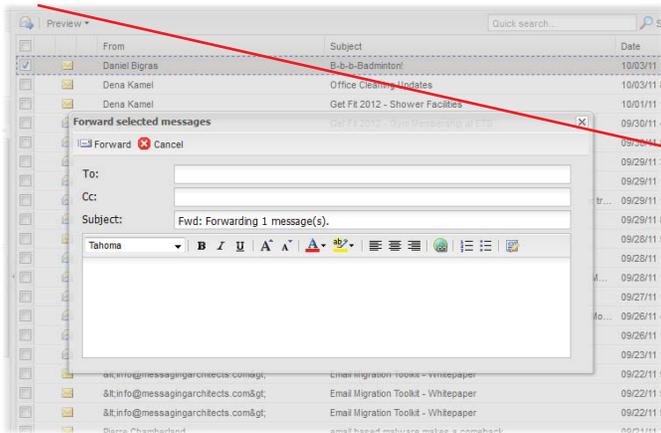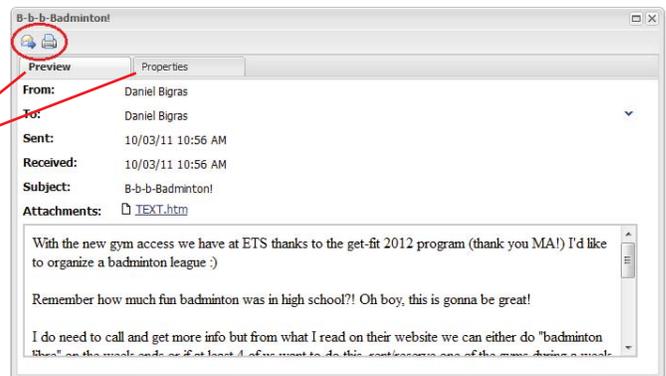
Forwarding Messages

To forward one or more selected messages, click **Forward** in the top left-hand corner of the message view. In the **Forward selected messages** dialog box, enter the email address(es) of the person(s) to whom you're forwarding the message, and click **Forward**. You can also simply double-click a message to open it, and click **Forward** .

Printing Messages

To print a message to PDF, double-click the message to open it, and then click **Print** in the top left-hand corner of the message window. A **Print Options** dialog box opens. Select any additional message information that you want to include in the PDF, including attachments, audit file information, and email metadata. Click **Print**. A new window in Netmail Search opens. The selected message, along with any optional information you selected, is printed in PDF format. The PDF file can also be saved for future use.
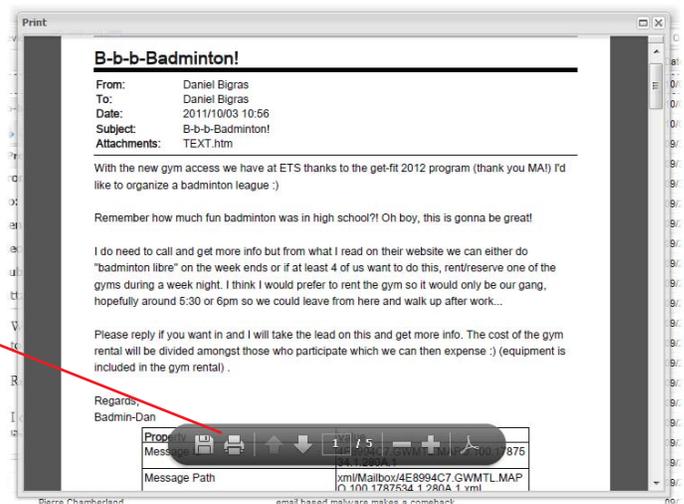
Calendar View

The calendar view allows you to display archived calendar items, such as appointments, notes, and tasks, in a calendar. To do so, click on the **Calendar** folder located in the folder view.

There are four modes in which calendar items may be viewed: **Day view**, **Week view**, **Month view**, and **List view**.
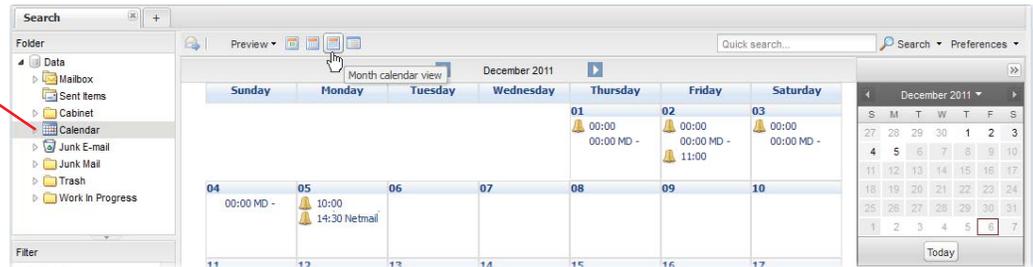
It's possible to preview your calendar items. To quickly preview a calendar item, simply hover your mouse over the item. A popup appears, showing the time, subject, location (if any), and part of the message body (if any) of the item. Just as in message view, you can also preview calendar items in **Bottom pane** or **Side pane** view. To fully view the details of a specific calendar item, double-click the item to open it and view its contents in a separate dialog box.

Filters

Netmail Search has an advanced set of filters that make it easy for you to locate the precise information you are looking for. The search tab on the left-hand side of the archive overview screen lets you apply filters to your archived items.
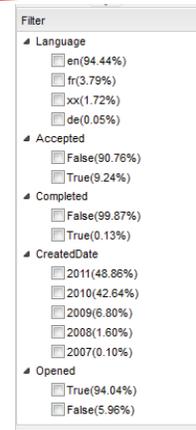
Filtering by Archive Folder

The **Folder** filter lists the folders located in your archive.
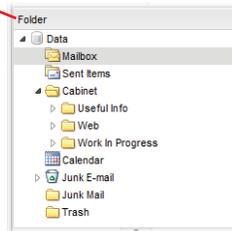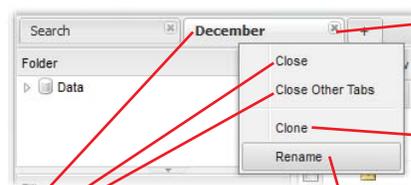
Using Filters

There are a number of filters you can use to help you quickly sort through data. You can enable any of the following filter components for your search: **Language**, **Item Type**, **Opened**, **Read**, **Created Date**, and **Received Date**.

Conducting Multiple Filtered Searches

By default, one search pane is open on the main archive overview screen. You can open additional search panes to run multiple searches with different filters applied to each search.

Adding Searches:
To add another search pane, click the **+** icon to the right of the **Search** tab.

Cloning Searches:
To replicate the results of an existing search in a new search pane, right-click on the tab of the search you want to replicate, and select **Clone**.

Deleting Searches:
To delete a search, click the **x** on the **Search** tab of the search you want to delete, or right-clickthe **Search** tab, and select **Close**. To keep only one search and delete all others, select **Close Other Tabs**.

Renaming Searches:
To rename a search, right-click its **Search** tab, and select **Rename**. Enter the new name for your search, and click **OK**.

Advanced Searching

Netmail Search allows you to perform keyword searches as well as advanced searches on messages and attachments. Advanced searching allows you to apply various search criteria to help you narrow down your search and cull through your data quickly and efficiently.

Keyword Search

The top right-hand side of the archive overview features a **Quick search** box, which allows you to apply a specific keyword filter to the messages displayed in the message view.
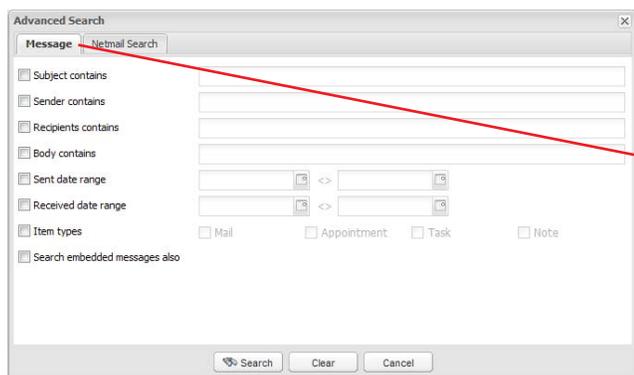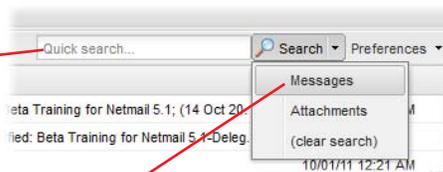
Message Search

To conduct a message search, click the arrow to the right of the **Search** button, and select **Messages**. The **Advanced Search** dialog box opens, displaying the **Message** tab. Here, you can search through your messages by subject, sender, recipient, body contents, date range, and item type. You can also apply your search to embedded messages.

The **Netmail Search** tab allows you to build custom search queries. You can apply one or more of the following attributes: **Exact phrase**, **Forbidden terms**, **Words starting with**, **Approximate spelling**, and **Proximity search**. You can also build custom search queries. To do so, select an attribute, enter a word(s) you want to include in your query, and click **Apply**. Use the **AND** and **OR** Boolean operators to add more attributes to your query.
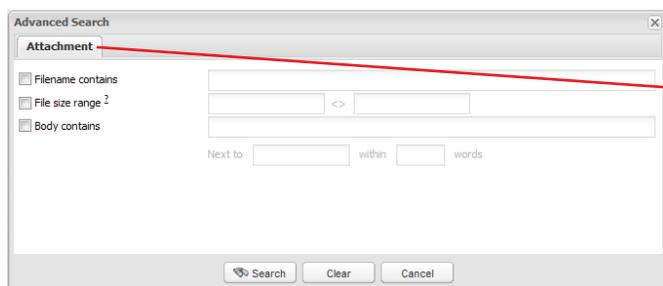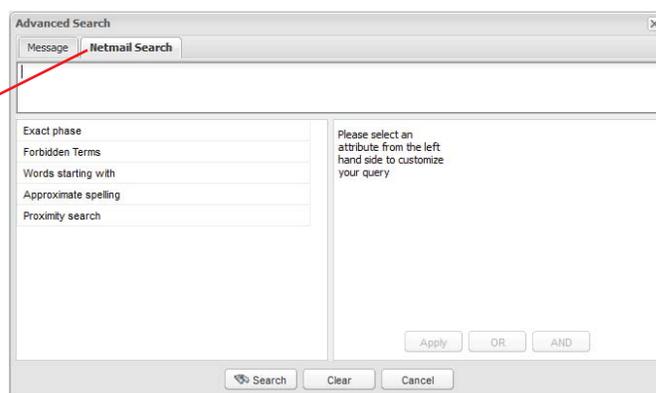
Attachment Search

To conduct an attachment search, click the arrow to the right of the **Search** button, and select **Attachments** from the dropdown list. The **Advanced Search** dialog box opens, displaying the **Attachment** tab. An **Attachment** search allows you to search through your attachments by filename, file size, and attachment body contents.

Viewing Search Terms

Netmail Search's highlighting tool makes it easy for you to quickly locate your search terms in your search results. When enabled, the highlighting tool highlights your search terms in yellow in the list of search results.

This tool is enabled by default. To disable it, click **Preferences > Highlight Search Terms** to remove the checkmark next to it. Note that the highlighting tool applies only to message searches, not to attachment searches.