

Netmail Search for Outlook® 2013

Quick Reference Guide



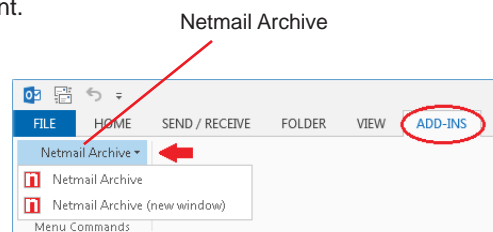
Netmail Search is an easy-to-use web-based electronic discovery tool that allows you to easily search, sort, retrieve, view, and manage your archived items. The tool offers advanced search features and allows you to build your own customized searches, meaning you're never limited to default search criteria.

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. In your web browser, navigate to your Outlook login screen, and log in to your Outlook email account.
2. In Outlook, click the **Add-Ins** tab and click **Netmail Archive**. You can choose to view your archives directly in Outlook or in a new window. Netmail Search (the application that gives you access to your archives) is displayed.



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 Outlook Web App mailbox, click the **Netmail** link located in the top right-hand side of the screen. You will be redirected to Netmail Search (the application that gives you access to your archives). Netmail Search will open in the same tab. To return to Outlook Web App, click **Mail** in the top right-hand corner of Netmail Search, and you'll be automatically redirected back to Outlook Web App.



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. Three mail window panes appear on the screen: **Folder view**, **Filter & Folder Stats view**, and **Message view**.

Folder view

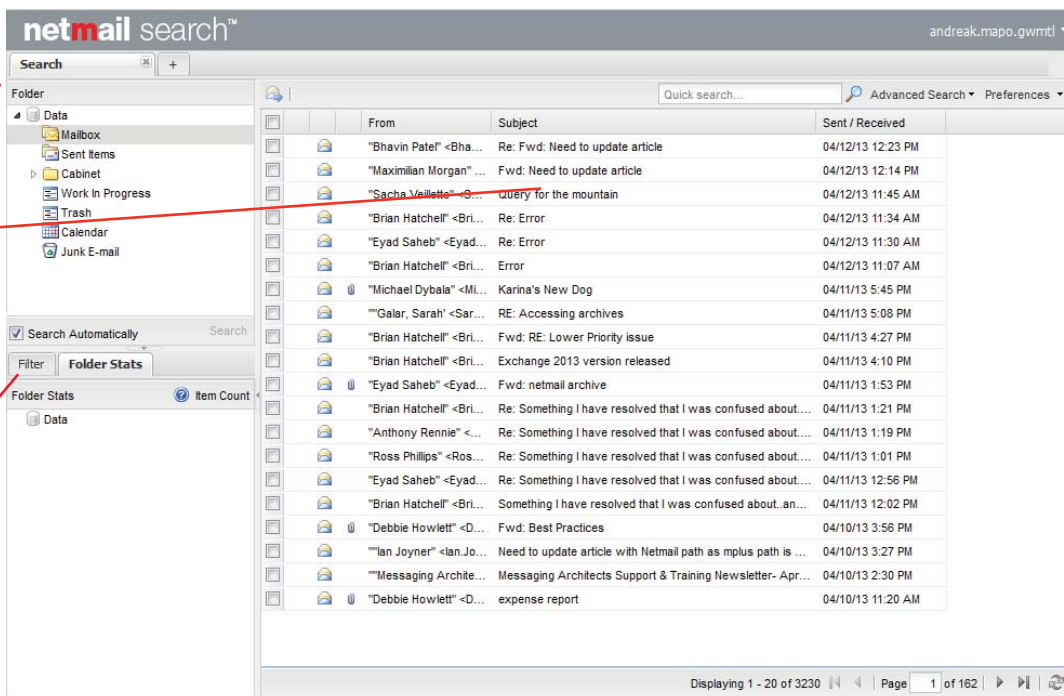
Lists the archive stores in which your archived data is located.

Message view

It is the main portion of the archive overview. It provides a list of all your archived messages.

Filter & Folder Stats view

The **Filter** tab 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 that are shown.



The **Folder Stats** tab displays the number of items found in each folder. More specifically, the **Item Count** represents the number of items at the root of a given account or folder, not including the number of items in subfolders. The Item Count is updated each time items from the live mail system are archived.

Proxy Access

The Proxy Access feature gives you proxy access to other users' archives. If you have been given proxy access to other archived accounts, the folder view on the left-hand side will list both the archive stores and folders in which your archived data is located as well as those of all users whose archives you have been granted proxy access to. Just as with your own archived messages, you can also view, filter, search, forward, and print the archived messages of those user accounts to which you have proxy access.

If you don't see any other archives other than your own, then you don't have proxy access rights to any archived accounts. Rights were either never granted or have been revoked.

The screenshot shows the netmail search interface. On the left, a folder tree lists 'alexander' and 'chrisse', each with an 'Inbox' folder. Red arrows point from text labels to these folders. The main area displays a table of messages with columns for From, Subject, Date, Sent / Received, and Folder. The messages are from 'Alexander Velarde' and 'Faye Spicer'.

Archives of user who is currently logged in

Archives of user to which current user has proxy access rights

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 **Preferences > Preview**, and select either **Bottom pane** or **Side pane** from the dropdown list.

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

The screenshot shows the netmail search interface with a message selected. A dropdown menu is open, showing 'Bottom pane' and 'Side pane' options. Red arrows point from text labels to these options. The bottom pane shows the message content 'So cute!'. The side pane shows the message content 'So cute!'.

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

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

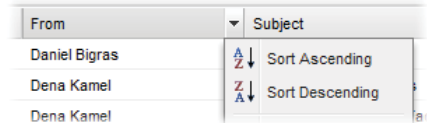
The screenshot shows the netmail search interface with a message selected. The Properties tab is active, displaying message details like Message ID, From, To, Subject, and Attachments. The Preview tab is also visible, displaying the message content. Red arrows point from text labels to these tabs.

Properties

Preview

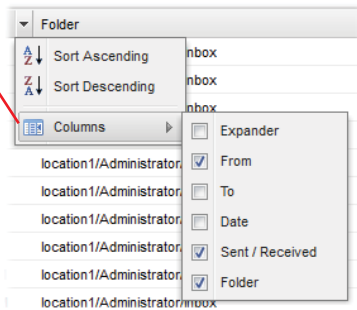
Sorting Messages

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.

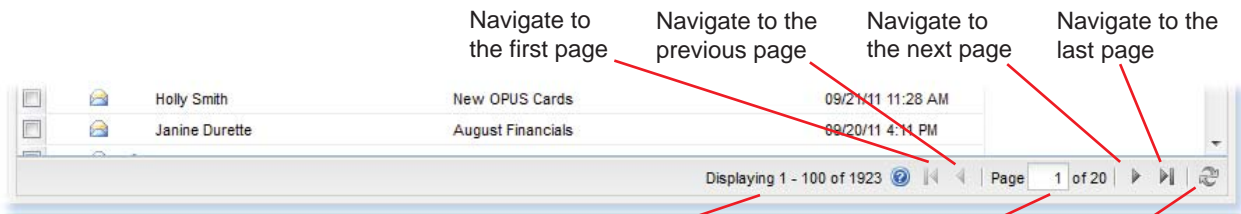
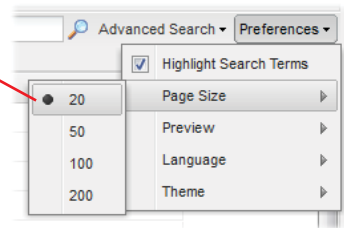
Date: Displays when the message was archived.

Sent/Received: Displays when the message was sent or received.

Folder: Displays the archived store and folder in which 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.



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

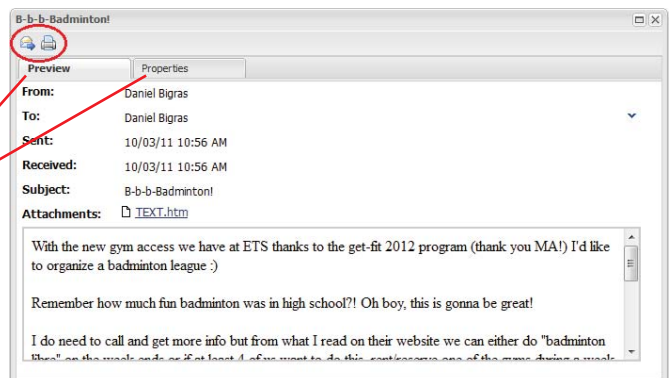
Performing Actions on Messages

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

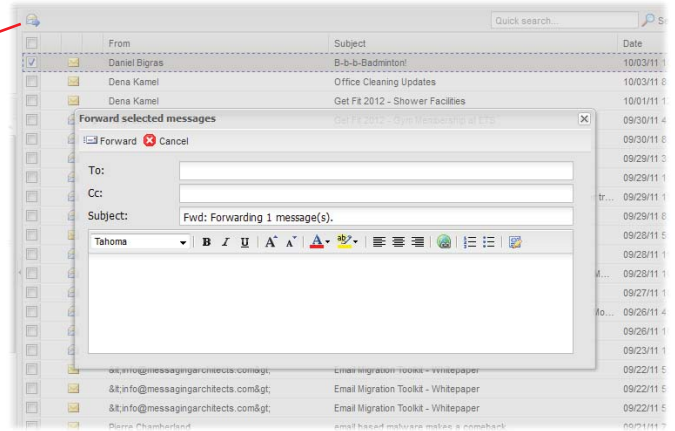
To open a message and view its contents in a separate dialog box, simply double-click it.

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.



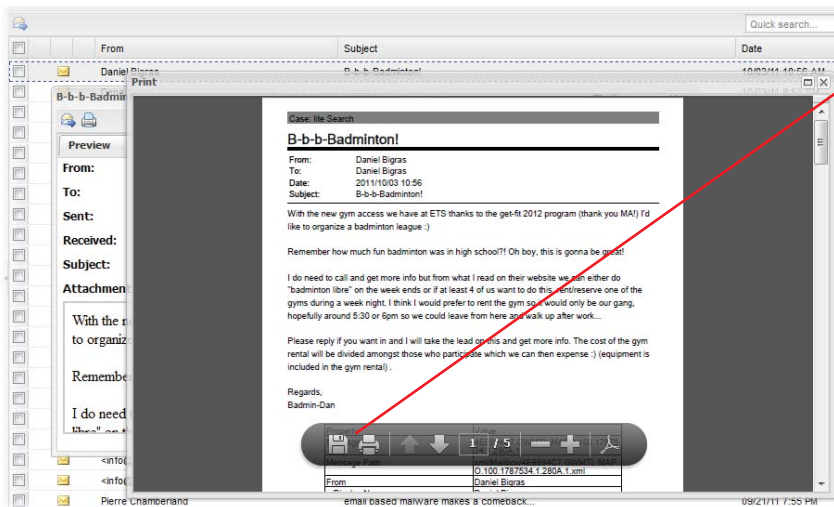
Forwarding Messages

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

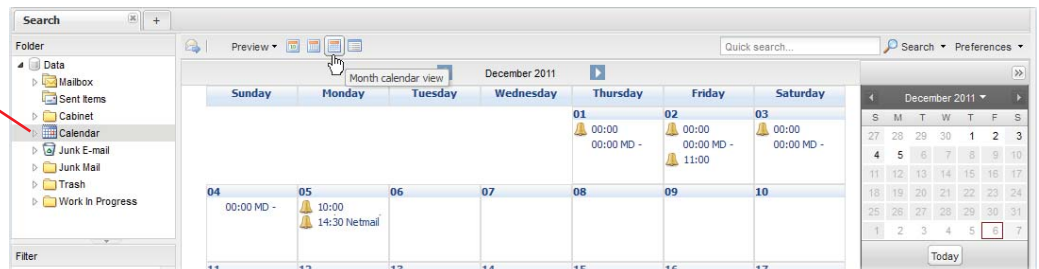
To print a message to PDF, double-click the message to open it, and then click **Print** in the top left-hand corner of the message window. A **Print Options** dialog box opens. Select any additional message information that you want to include in the PDF, such as attachments, email metadata, and highlighted search terms. Click **Print**. A new window opens in Netmail Search. 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**.



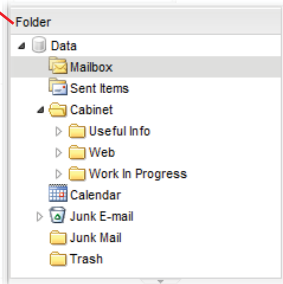
It's possible to preview your calendar items. To quickly preview a calendar item, simply hover your mouse over the item. A popup appears, showing the time, subject, location (if any), and part of the message body (if any) of the item. Just as in message view, you can also preview calendar items in **Bottom 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 and Searches

Netmail Search's advanced filtering and search features make it easy for you to find exactly what you're looking for.

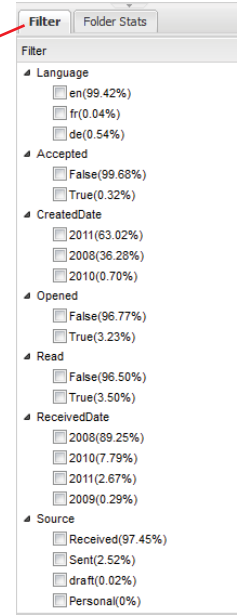
Filtering by Archive Folder

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



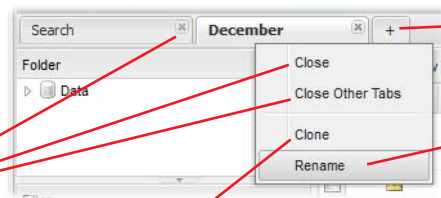
Using Filters

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



Conducting Multiple Filtered Searches

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



Adding Searches:

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

Renaming Searches:

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

Deleting Searches:

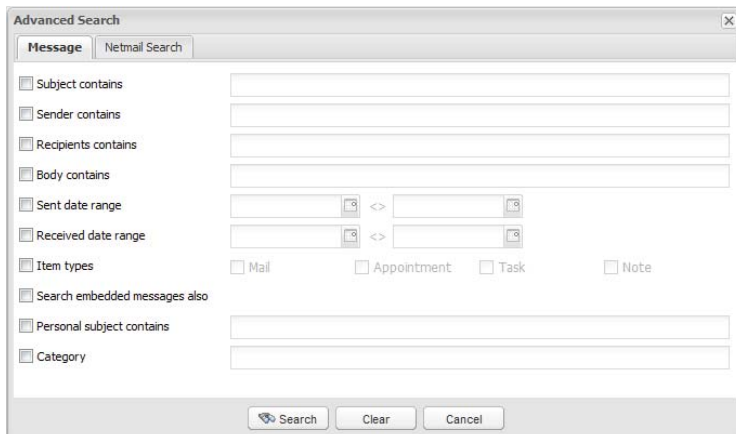
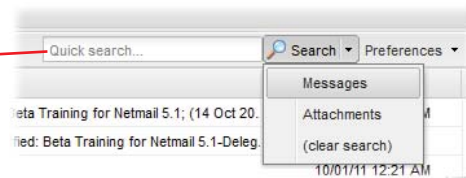
To delete a search, click the **x** on the **Search** tab of the search you want to delete, or right-click the **Search** tab, and select **Close**. To keep only one search and delete all others, select **Close Other Tabs**.

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**.

Keyword Search

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

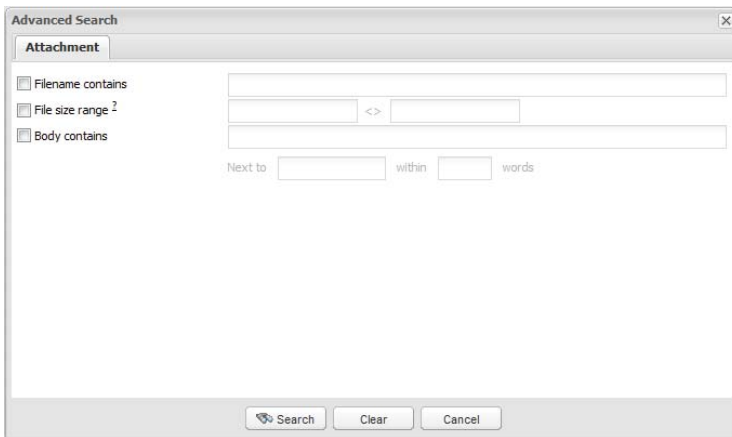
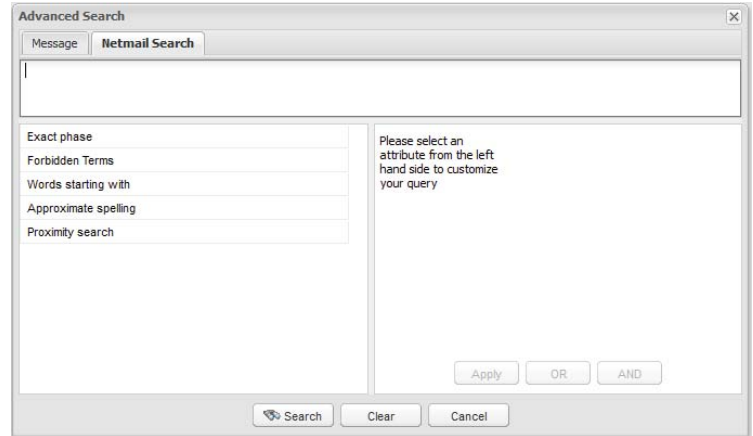


Message Search

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.

Netmail Search Tab

The **Netmail Search** tab allows you to build custom search queries by applying 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**. 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.

