



WFG Enterprise Archive Basic User Guide

Introduction	3
How to Access the WFG Enterprise Archive	3
Accessing from a Web Browser	3
Searching the WFG Enterprise Archive	4
Identifying Names in Searches	4
Basic Searching (Personal Archive)	4
About the Search Screen	4
Basic Search Procedure	4
Finding Items from Specific Senders or Recipients	4
Finding Items in Specific Mailboxes	5
Finding Items Sent on Specific Dates	5
Finding Items that Contain Specific Types of Attachments	5
Finding Items that Contain Specific Words or Phrases	5
Using Boolean Logic for Content Searches	6
Using Wildcards for Content Searches	6
Working with Results List and Retrieving Emails	7
Enabling Outlook Folder Sync	7
Enabling Outlook Folder Synchronization	8
Limitations	8
Questions	9

Introduction

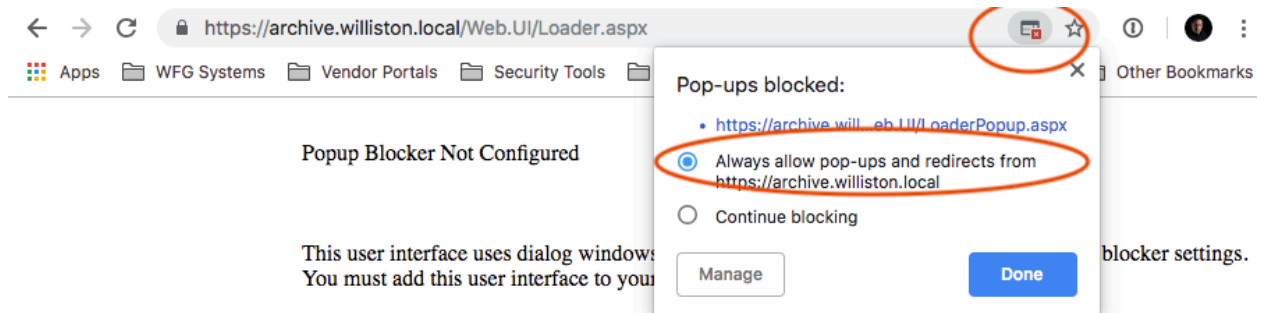
The WFG Enterprise Archive is an email archive that enables users to find lost, deleted, or older email messages than is supported within their standard Outlook folders. Email will be kept in the Enterprise Archive in accordance with the WFG Record Retention Policy.

This guide is intended to be a basic introduction for searching the WFG Enterprise Archive. An advanced and more technical guide is also available, published by the archive provider, ProofPoint. The more advanced guide goes into advanced search functionality and configurations.

How to Access the WFG Enterprise Archive

Accessing from a Web Browser

1. Open up your choice of internet browser.
2. In the address bar, enter the URL to access the WFG Enterprise Archive: <http://archive.williston.local/>
3. Enter the same user name and password you use to log in to your computer (i.e. johnsmith / SECUREPASSWORD).
 - a. You may receive a warning that a pop-up was blocked. Allow all pop-ups for this site. Below shows how to do this within Chrome. Internet Explorer has a message at the bottom of the browser that will allow you to similarly enable all pop-ups for the site.



1) Click the Chrome menu on the browser toolbar. Select "Settings" and click "Show advanced settings". In the "Privacy" section, click the Content settings button. In the "Pop-ups" section, click Manage exceptions.

2) Add "archive.williston.local" to the list of exceptions

3) Click [here](#) to continue

Searching the WFG Enterprise Archive

The screenshot shows the Proofpoint search interface. At the top left is the Proofpoint logo. To the right are tabs for 'SEARCH' and 'OUTLOOK FOLDERS'. Below these are utility buttons: 'PRINT', 'PROPERTIES', 'RETRIEVE', 'FULL UI', and a help icon. The main search area contains four input fields: 'FROM:' with a placeholder 'Anyone <Enter 'ME' or a name here to be more specific>', 'MAILBOX:' with a dropdown menu set to 'ALL MAILBOXES', 'TO:' with the same placeholder as the FROM field, and 'SENT:' with a dropdown menu set to 'ANY DATE'. There are 'SEARCH' and 'CLEAR' buttons to the right of these fields. Below the input fields are 'CONTENT:' and 'ATTACHMENT:' fields. The 'CONTENT:' field has a placeholder 'Anything <Enter words or phrases here to be more specific>' and a 'SHOW HELPER' button. The 'ATTACHMENT:' field has a dropdown menu set to 'Not Required'. On the right side of the interface, there is a 'Getting Started' section with three numbered steps: 1. Enter Search criteria (In the search bar (above) enter keywords, email addresses or other information to look for.), 2. Click "Search" (The archive will be searched for matches and the results displayed in the area to the left.), and 3. Click on a result to view (You can view the message and download attachments in this area by clicking on a search result.).

Identifying Names in Searches

For searches where you need to identify an internal WFG mailbox, Active Directory user, or Active Directory group by name, the following process is used:

1. Enter all or part of the appropriate name in the FROM or TO field.
2. After a moment, suggested names will pop up.
3. Click on the desired name to select it.

Basic Searching (Personal Archive)

Depending on how you logged on, you may have access to both basic (Personal Archive tab) and Advanced searching. This guide covers the use of basic searching. If you are accessing the archive through Outlook, you are using the basic search interface.

About the Search Screen

The search screen has four basic components:

- The search criteria area, where you enter values identifying items for which to search.
- The results list, containing a list of items that match your search criteria.
- A preview of the contents of the item selected in the list.
- The archive toolbar, which offers access to functions that affect the selected item.

Basic Search Procedure

1. Enter search criteria.
2. Click Search.

Finding Items from Specific Senders or Recipients

To find items that you sent or received:

1. Enter ME (in capital letters) in the **From** or **To** box and press ENTER.
2. Click Search.

To find items based on a display name, Internet email address, or internal email account:

- Enter the name or address in the **From** or **To** box.
- Press ENTER or choose from the suggestion list of potential names that appears.
- Click Search.

Finding Items in Specific Mailboxes

Depending on your user access, you may be able to search just in your own mailbox, or in mailboxes associated with others (individuals or departments).

1. From the Mailbox list, choose the appropriate mailbox (or group of mailboxes)
2. Click Search.

Finding Items Sent on Specific Dates

1. From the Sent list, choose the appropriate date condition and, in the adjacent field, choose the specific date (if required).
 - a. To search for items sent on any date, choose *Any* date. To search for items sent between two dates, choose *Between* and specify both dates using the calendar. If you know the approximate date, choose *Within 5 days of* and specify the date using the calendar. To specify the date that items must have been sent on, before or after, choose *On*, *Before*, or *After* and specify the date using the calendar.
2. Click Search.

Finding Items that Contain Specific Types of Attachments

1. From the Attachment list, choose the attachment type.
 - a. To search for items with a specific type of attachment, choose the appropriate "is a" description. To search for items with another type of attachment, choose "is of another type". You are prompted to enter the file extension that will identify the attachment.
2. Click Search.

Finding Items that Contain Specific Words or Phrases

To enter values manually:

1. In the Content box, enter words or phrases for which to search. The words or phrases are looked for in the following parts of the email:
 - Subject
 - Senders (From)
 - Recipients (To, CC, BCC)
 - Body
 - Header (SMTP header)
 - Names of attachments
 - Content of attachments
2. Click Search.

When you search for individual words, each word must appear somewhere in the item, but the words do not have to appear in the same area.

Note: You can enter a maximum of 32 separate words or phrases for which to search.

To enter values using the Helper:

The helper can show you how to construct more complex search criteria. The criteria you enter in the helper is automatically shown in the Content box. You can edit what you see in the box.

1. Beside the Content box, click Show Helper.
2. Enter values in the boxes that appear.
3. Click Search.

Using Boolean Logic for Content Searches

In addition to entering words and phrases, you can also use basic Boolean logic to refine or expand searches. The following elements are supported:

Term	Meaning
AND	Indicates that the words/phrases are both required. As spaces between words and/or phrases are treated as an "AND", use of this keyword is generally not required. Usage: "Bob Smith" AND factory
OR	Indicates that one or the other of the words/phrases is required, but they don't both have to be in the item for it to match. Usage: "Bob Smith" OR factory
- hyphen	Indicates that the following word or phrase must not be in the item. Usage: "Bob Smith" -factory
() brackets	Indicates a grouping of logical elements for evaluation. Generally brackets are only required when you combine AND and OR logic in a single search. Usage: ("Bob Smith" OR "Mary Jones") AND factory
~ tilde	Inserting a tilde followed by a number lets you do a proximity search to find matches within the proximity of the original results. In the example, all documents that contain search terms within 3 words of searchtermB will be found. Usage: "searchtermA searchtermB"~3

Note: The operators "AND" and "OR" must be entered with capital letters. The lower case versions are used to search for content containing the words "and" and "or" themselves.

Using Wildcards for Content Searches

Use the * (asterisk) symbol to search for any number of characters (this will also return a match if no characters are found in the asterisk's position in the string). Use the ? (question mark) symbol to search for a single character: you can use multiple ? symbols to search for a specific number of characters.

For example, searching for **contract*** finds "contract", "contracts", "contractor", and "contractual". Searching for **contract?** finds "contracts" but not "contract"; searching for **contra??** finds "contract" and "contrary", searching for **contract?r** finds "contractor".

Wildcards can be used at either the start or end of the string (***suits, ?file**) but not in both positions (***file*** is not a valid search string). At least four characters must appear in the string used with the wildcard.

To search for the use of a wildcard character as a string, surround the search data with quotation marks: for example, "**lawsuit?**".

Your entry is expanded against a dictionary of more than 170,000 terms, using Spell Checking Oriented Word Lists (SCOWL): for a full list of words, [click here](#). If your entry matches more than 50 terms, you are prompted to limit the search criteria further (for example, by adding more characters to the string).

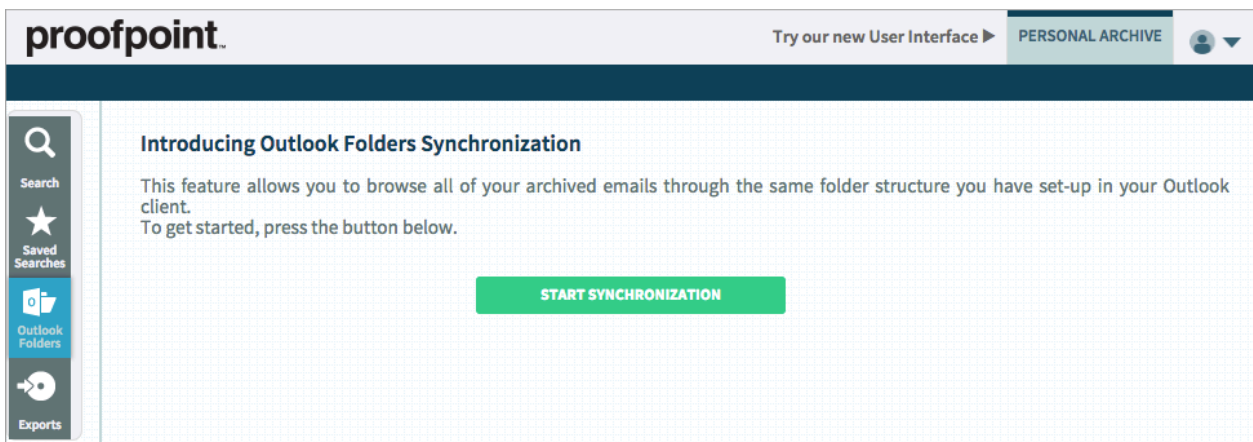
If you perform wildcard searches from the Advanced module, once your search is complete you see a link that allows you to view the dictionary items that your search criteria matched.

Wildcards used in searches are included in saved searches.

Working with Results List and Retrieving Emails

- To view an item, click on it in the results list: the item opens in the preview area.
- To view multiple items, hold SHIFT or CTRL while clicking on items.
- To print the item currently shown in the preview area, on the toolbar, click **Print**.
- To retrieve a copy of archived items to your Inbox, select the items and, on the toolbar, click **Retrieve**. A new screen opens: select **Retrieve to My Inbox** and click **Retrieve**.
- To forward a copy of archived items to others, select the items and, on the toolbar, click **Retrieve**. A new screen opens: select **Forward To**, enter the appropriate email address or addresses and click **Retrieve**.
- To change the sort order of results, click in the heading area of the results list and choose a sort option.
- To view additional pages of results, use the icons at the bottom of the result list to navigate to the first page, previous page, next page or last page of results.

Enabling Outlook Folder Sync

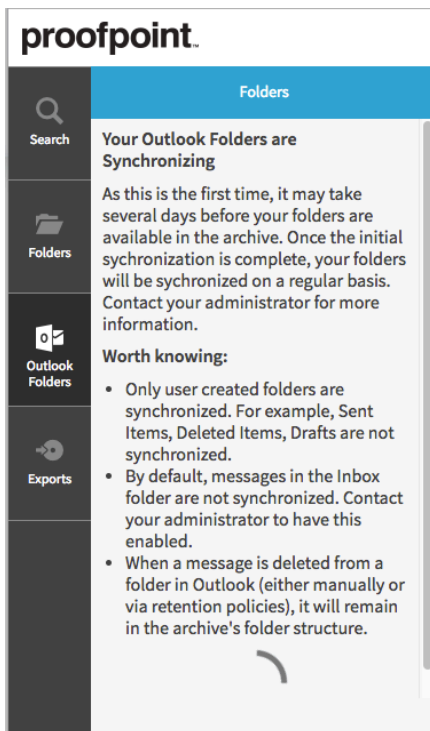


The screenshot shows the Proofpoint web interface. At the top left is the 'proofpoint.' logo. To its right is a link 'Try our new User Interface' and a 'PERSONAL ARCHIVE' button with a user profile icon. On the left side, there is a vertical navigation menu with icons for 'Search', 'Saved Searches', 'Outlook Folders', and 'Exports'. The main content area features a heading 'Introducing Outlook Folders Synchronization' followed by the text: 'This feature allows you to browse all of your archived emails through the same folder structure you have set-up in your Outlook client. To get started, press the button below.' A prominent green button labeled 'START SYNCHRONIZATION' is centered below the text.

Enabling Outlook Folder Synchronization

The following steps apply to both the “Classic” and “new User Interface”. The look of things is a little different, but key steps are still the same.

1. Login to the ProofPoint Archive Web User Interface.
2. Click on “Personal Archive” on the upper right.
3. On the left, click on “Outlook Folders”.
4. If you have not yet started the synchronization, you will be prompted to “Start Synchronization”. Click the “Start Synchronization” button (shown above).
5. At this point, you will see a message indicating that the synchronization is running.



Limitations

There are some key aspects to the Folder Sync that are important to keep in mind.

1. The folder synchronization only synchronizes user-created folders. It does not include Sent Items, Deleted Items, Drafts, etc.
2. The Inbox itself is not synchronized. Since the synchronization will show a copy of an email for each location it has been saved in (in the case of moving emails around), all emails would reflect as being within the inbox, since they all start there.
3. Synchronization to folders **is not** retroactive. Items in folders prior to enabling your Outlook Folder Synchronization will not be synchronized into the folders shown in the Archive. Items received after enabling this feature will be synchronized. All your emails will still be searchable, however.

Questions

For further questions about using the WFG Enterprise Archive, please contact your local Help Desk.