techarrow

contentWEB

Manual – version 3.4

JANUARY 30, 2018
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What is contentWEB?

contentWEB is a client application of contentACCESS, which is used for viewing items processed/archived by contentACCESS via a web browser. A user can access contentWEB using the following sample:

http://[contentWEB_Server_Name]/contentWEB/

The only condition to access the archive with contentWEB is to have contentWEB access permissions that can be granted in contentACCESS Central Administration. For more information about how to grant access permissions please refer to the respective chapters of the contentACCESS Manual.

contentWEB is also accessible from all mobile devices. Pages fitting mobile device screen and simplified navigation contribute to ease of use. The searching, item listing, filtering, recovery and export functions of contentWEB make the work with these documents more comfortable and intuitive.

Main contentWEB functions:

- ✓ Quick and easy access of the processed emails/documents over the Internet;
- ✓ Easy access from mobile devices;
- ✓ Searching between the items according to their parameters (To, From, Subject, etc.)
- ✓ Searching in the content of the documents (using File Content Extractor plugin).
- ✓ Zero term search, quick search and advanced search.
- ✓ Easy item sorting and downloading options.
- ✓ Exporting into .pst and .zip format.
- ✓ Manual recovery of the archived items.
- ✓ Active/inactive document view in the File system archive.
- ✓ Document versions are accessible in the File archive.
- ✓ One-click login with external providers.
- ✓ Saving the last view of the logged in user.

Requirements

The hardware, software, other requirements and the web browsers supported by contentWEB will be detailed in the following subchapters of the guide.

Hardware requirements

Minimal	Recommended
Intel P4 2 GHz processor	Dual Xeon
2GB RAM	4 GB RAM

Software requirements

- Operating System (64bit): Windows 2008 R2 and higher;
- Internet Information Services 7.0 and higher;
- .NET Framework 4.5.

The following prerequisites are needed if you would like to browse email archive in contentWEB:

- MS Outlook 2010 x64, MS Outlook 2013 x64;

Note: Outlook binaries are needed, software does not have to be licensed or activated.

Other requirements

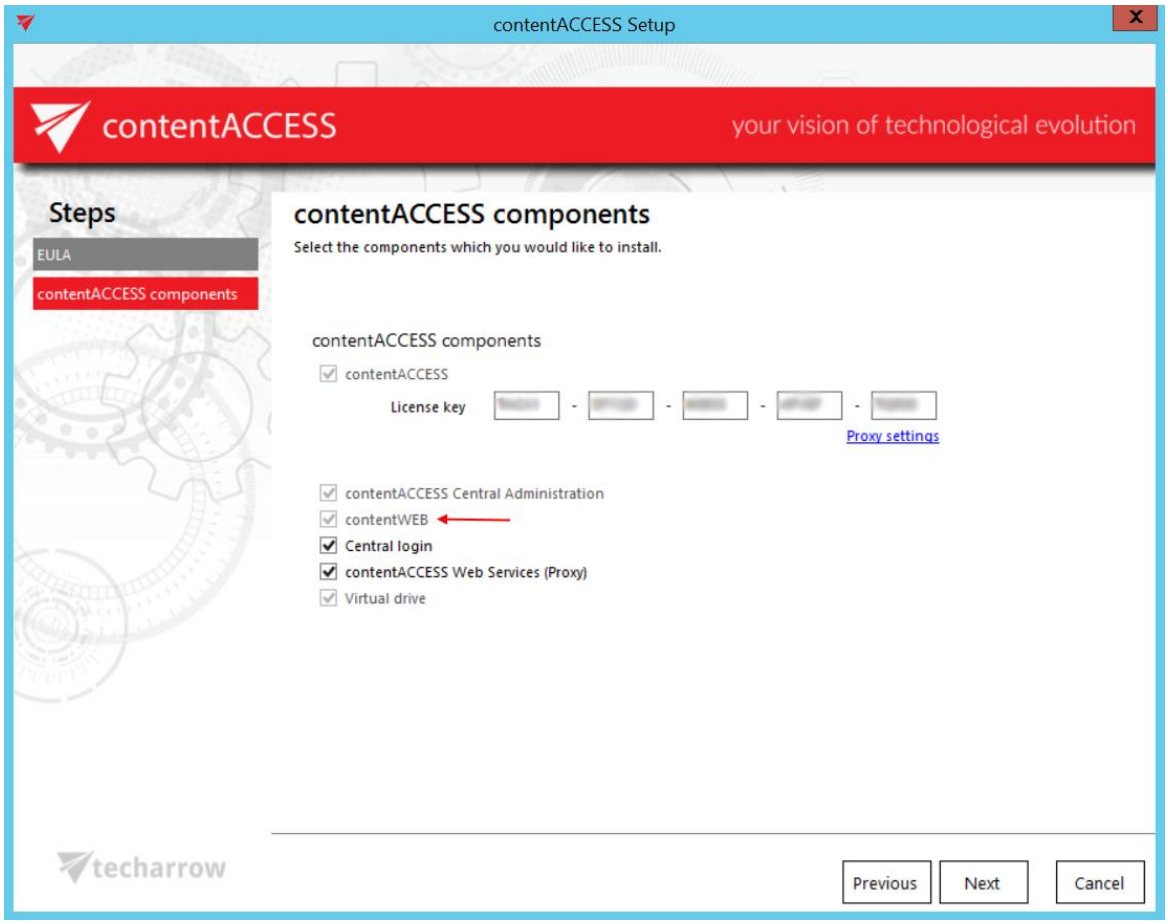
- Create SSL certificate for secure connection and apply in IIS for https bindings.

Supported browsers

- Windows Internet Explorer 10 and higher;
- Mozilla Firefox 12 and higher;
- Apple Safari 5 and higher;
- Google Chrome 18 and higher.

Installation

contentWEB can be installed as a contentACCESS component when running the contentACCESS installation package. Download and run the setup package and select “contentWEB” with checking the appropriate checkbox in the 2nd step of the installation process.



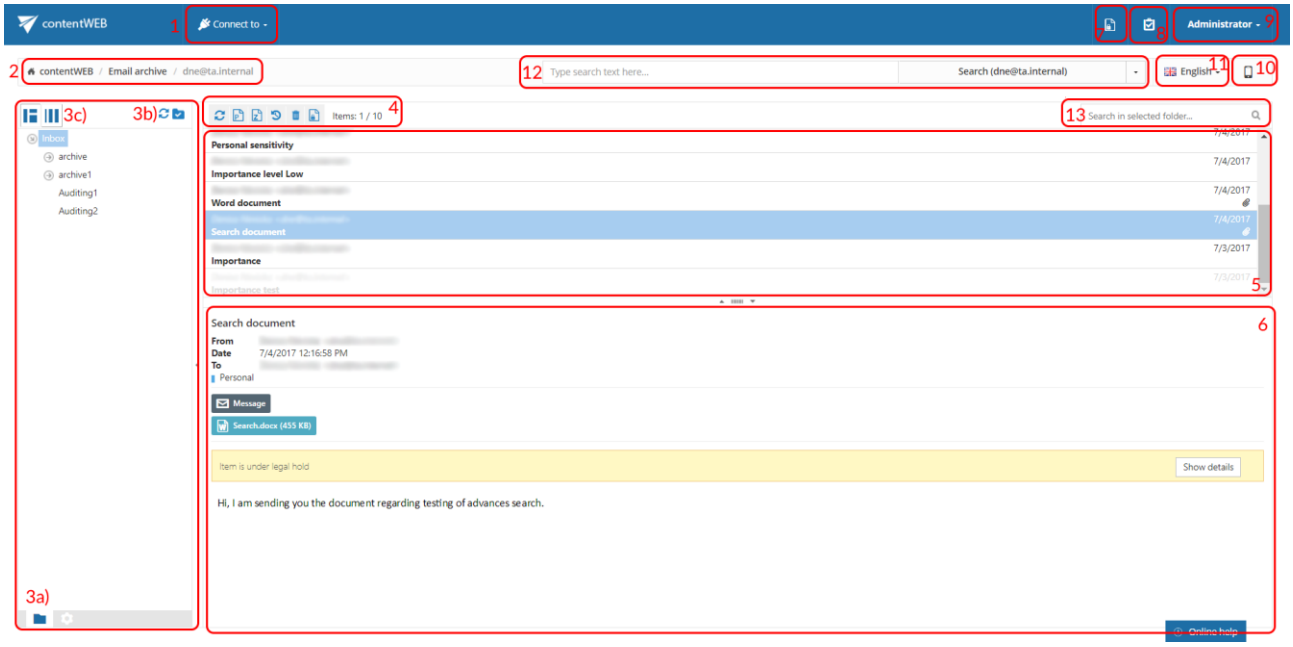
Logging into contentWEB

How to log in to contentWEB over the web browser? The user can log into the user interface using one of the supported web browsers. After browsing the contentWEB URL (http://[contentWEB_Server_Name]/contentWEB/Login.aspx), the central login window gets displayed. Users are asked to enter their name and password. Third party authentication providers can be also used for logging in (they must be configured in contentACCESS Central Administration). After logging in, the contentWEB archive interface opens.

Note: It is important to bear in mind that the end user must have contentWEB user permissions to log into the corresponding archive. This permissions can be granted in contentACCESS Central Administration.

contentWEB user interface

The contentWEB user interface is divided into the following sections:



1. "**Connect to" menu:** From this menu the user may connect to the associated entities. An entity can be an email archive mailbox, file system archive folder etc., so anything processed/archived by a certain contentACCESS plugin type and displayed in this menu;
2. **Breadcrumbs:** The logged on user may see here the entity that he is currently connected to in the "Connect to" menu;
3. **contentWEB pane:** based on the selected button at the bottom of the pane (3a) the folder structure; the active/inactive item filtering settings or double-click settings are displayed in the pane

   3 a) **Folders** button: used to display the selected entity's folder structure in the navigation pane;

   Active/inactive items button: active/inactive item view can be applied from here;

   Settings button: the double click on item function may be applied from here;

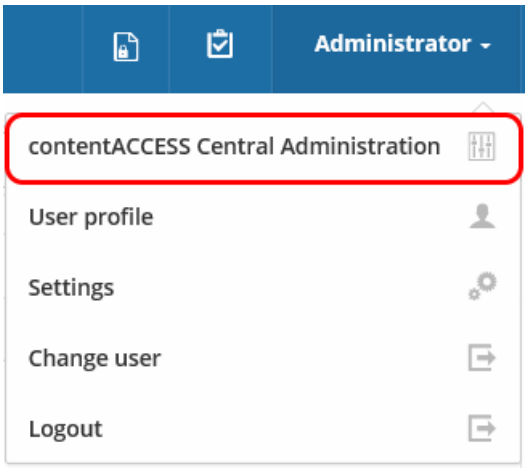
   Note: The **active/inactive items** button is not available for Email Archive.

   3 b) **Folder selector buttons:** Here you can enable folder selection and then select/deselect the entire folder structure in the pane;

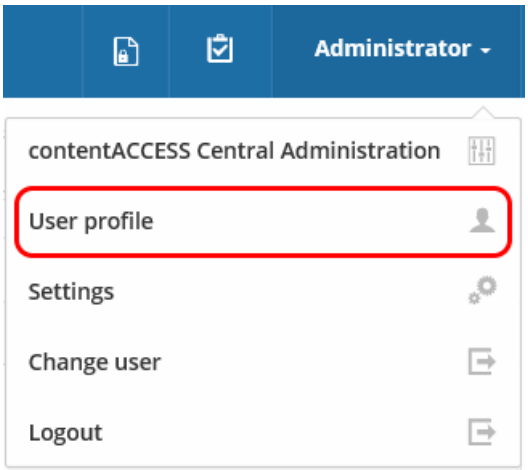
   3 c) **Layout selector buttons**: Use this to adjust the reading pane to the right/left side;

4. **Toolbar buttons – Refresh, Export to ZIP, Export to PST, Recovery, Delete, Legal hold** (the processing options are dependent on the selected entity);
5. **Item list view with the corresponding item properties;**
   Note: An item is a file/email from the list view that has been previously processed by the contentACCESS server;
6. **Item preview;**
7. **Legal hold:** allows to create a Legal hold case, where documents can be put - these documents can't be deleted from the system until the case expires;
8. **Tasks list**;
9. **Administrator's settings** menu: Common settings and UI settings may be applied from the "Settings" menu item (available and visible **only for System administrators**); click "Logout" to log out from contentWEB

There is also the option, which allows to open the Central Administration directly if the user has access to it (like Tenant admin or System admin)



And the option to open the User profile page.



10. **Switch to mobile version;**
11. **Language selection** menu: the user may select a language here;
12. **Fulltext search** and **Advanced search** menu;
13. **Simple search** textbox;

This manual will fully describe the above mentioned sections of the contentWEB user interface and will provide the reader with information about how to handle the processed items.

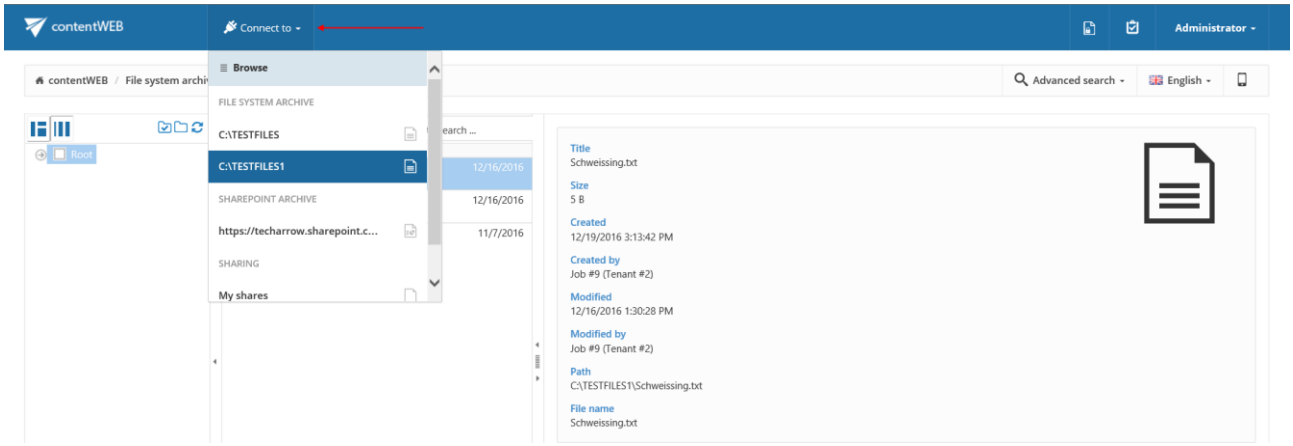
Definition of terms:

Item = a file, an email or a folder that is present in the contentWEB archive.

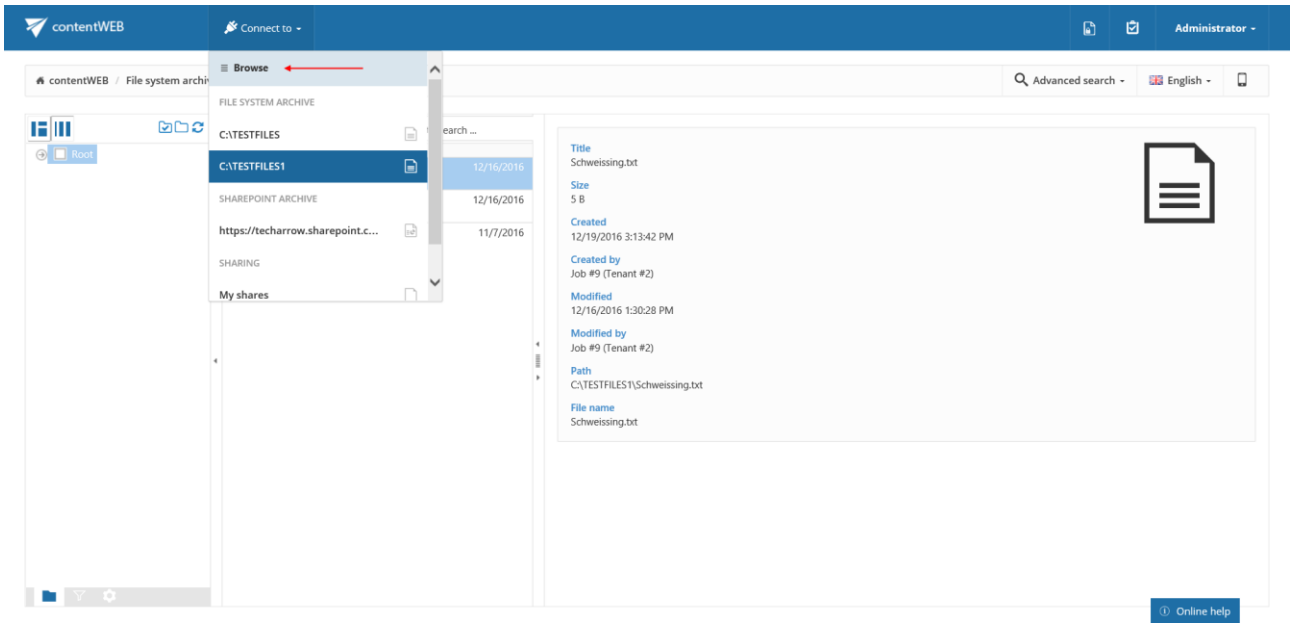
Entity = a mailbox (in case of Email archive), a root (in case of File system archive) ...; to connect to an entity select it in the "Connect to" menu

"Connect to" menu

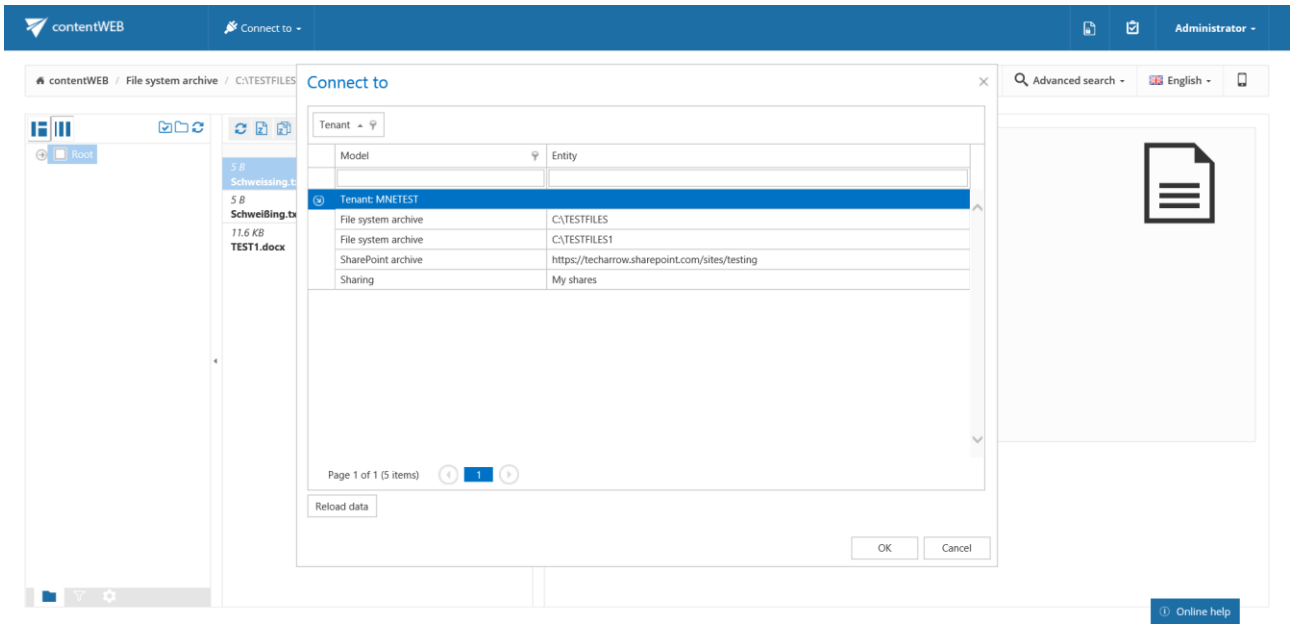
In the left upper part of the header bar click on the "Connect to" menu to unfold the associated entities that you can connect to (to which an access permission is granted). Under **EMAIL ARCHIVE** the associated archived mailboxes can be seen; under **FILE SYSTEM ARCHIVE** the associated archived folders from the file system are visible etc.



At the top is a **Browse** button. After clicking on it, a pop-up opens.

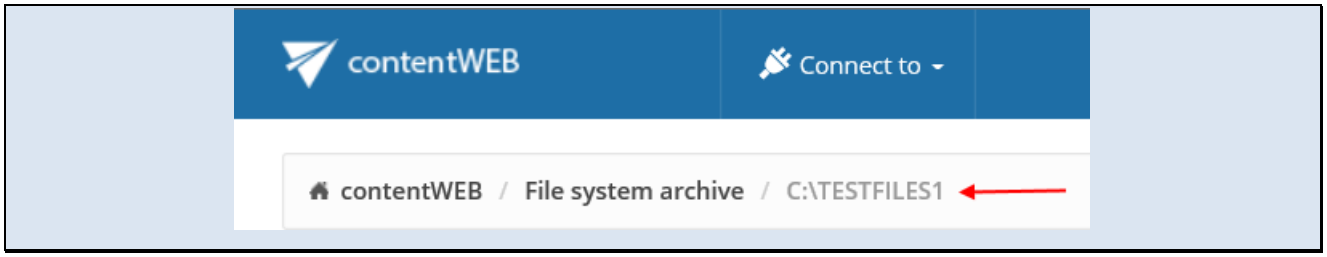


Here the user can browse the available entities. The grid allows to filter them by tenant and model type and it is also possible to search in them.

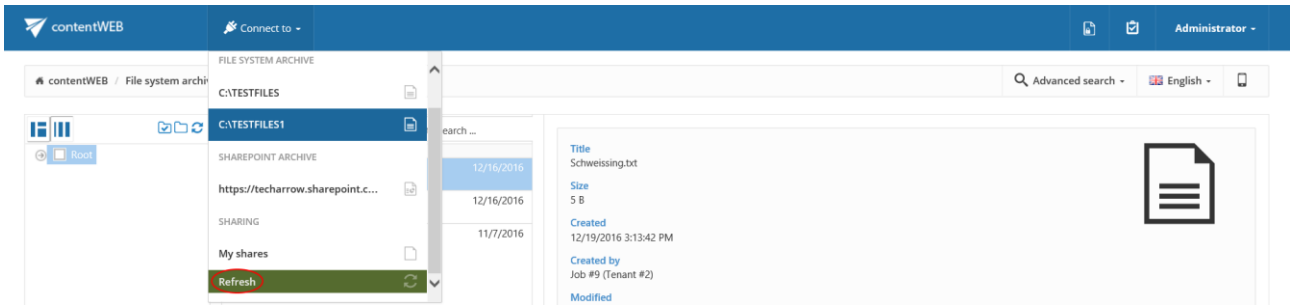


The user can select one entity and click OK or doubleclick on an entity to connect to it.

Note: Once you have connected to a desired entity, the corresponding breadcrumbs will be visible under the header bar of the contentWEB user interface.

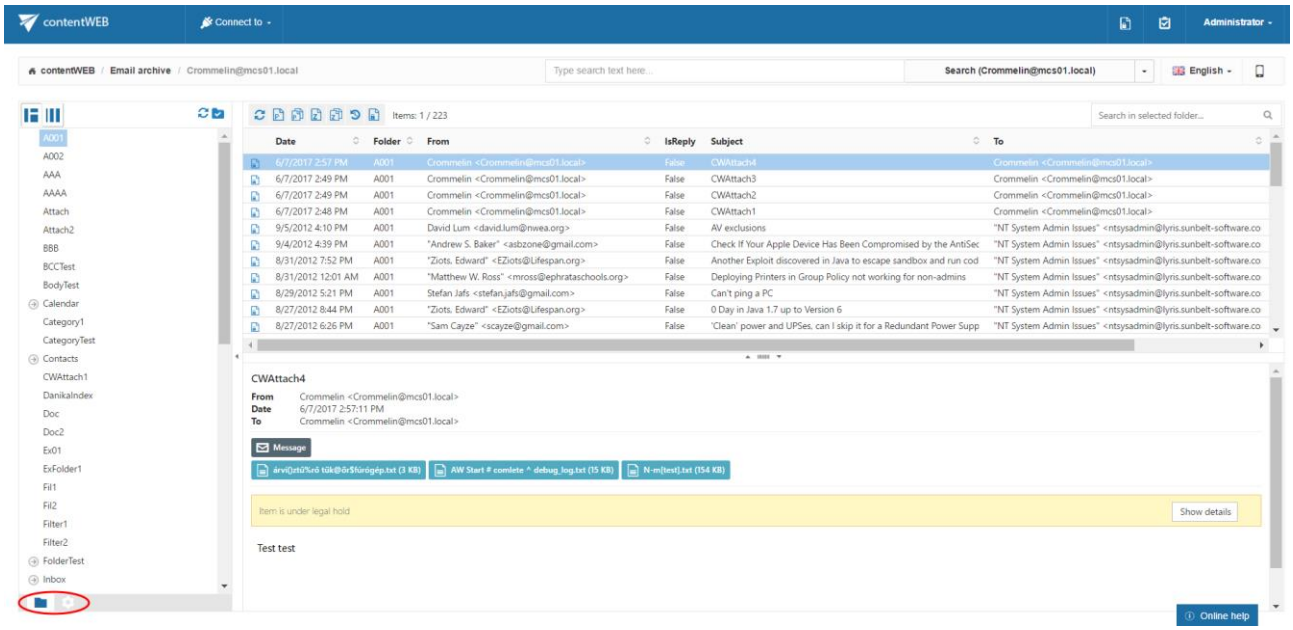


At the bottom of the connection list is a **Refresh** button. This may be used if any newly processed items have not been displayed yet and the list should be refreshed.



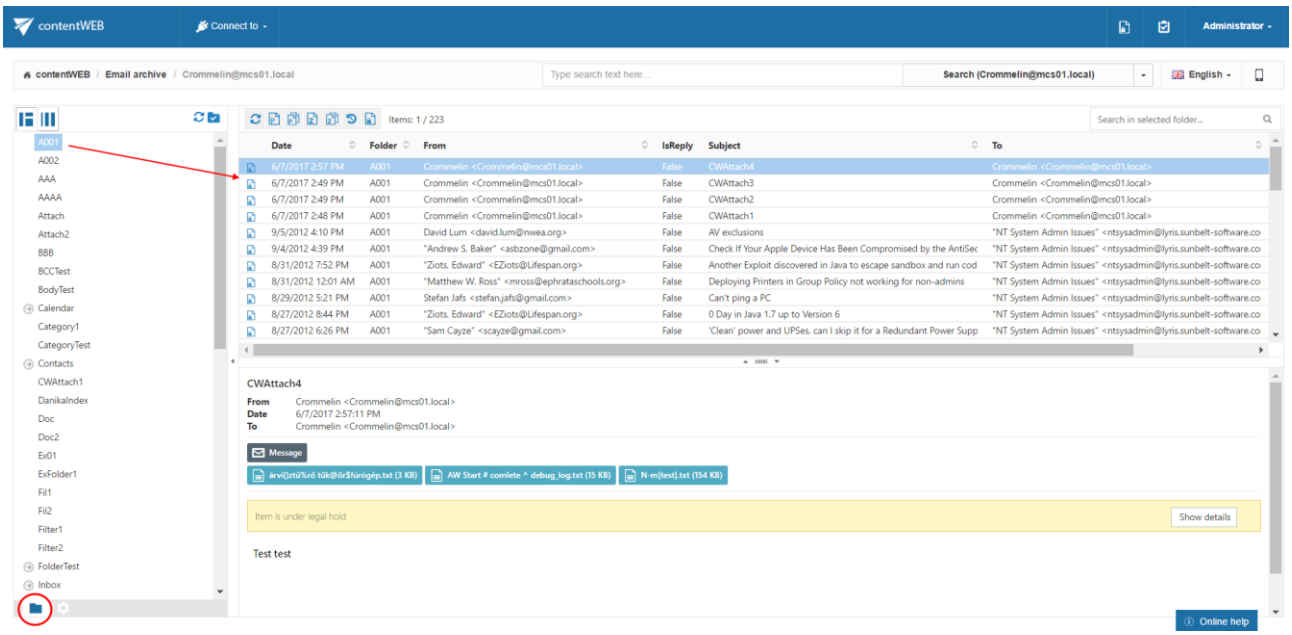
contentWEB's navigation pane

By default, the contentWEB pane displays the folder structure of the selected entity. By using the buttons at the bottom of the contentWEB pane, the user may switch between 2 views:



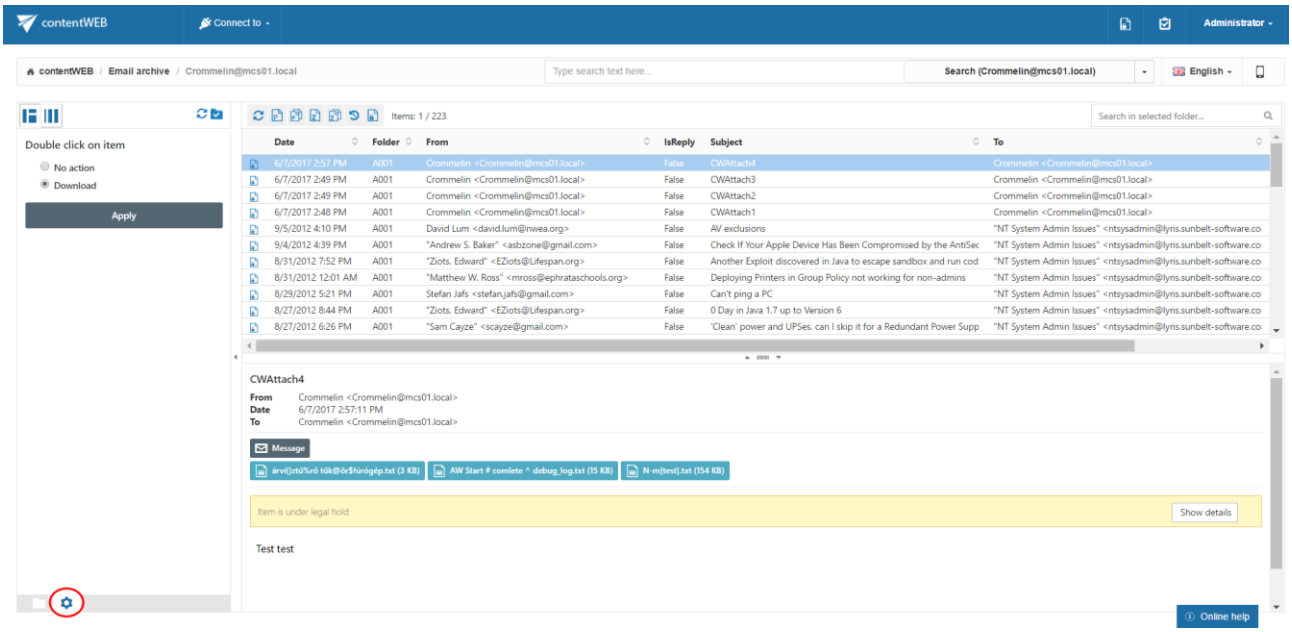
a. **Folders** button: Displays the selected entity's folder structure in the navigation pane. To view the content of a desired entity in contentWEB, connect to it in the **Connect to** dropdown list first. Select the **Folders** button in the navigation pane and unfold the structure of the desired folder.

Click on the folder in the pane and the content of the selected folder will be displayed in the item list.

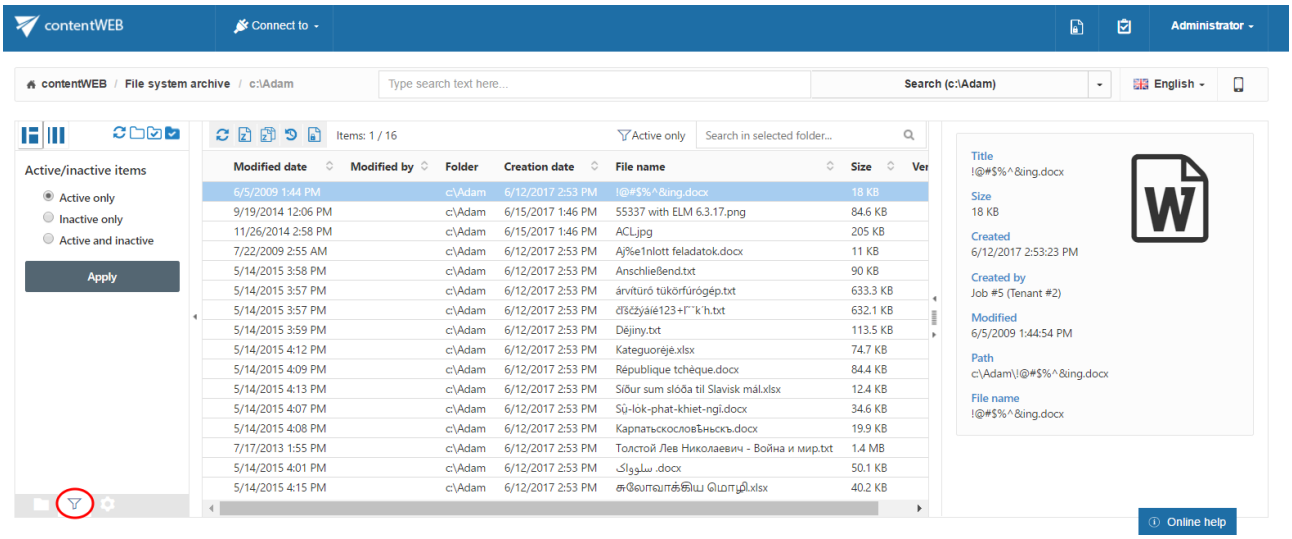


For more information about the folder selection types in the navigation pane refer to section [Folder selection methods](#) below.

b. **Settings** button: The double click on item function may be applied from here. For more information refer to section [Download from the item list/item preview in contentWEB](#).



c. **Active/inactive items** button: Active/inactive item view can be applied from here. For more information check section [Filtering of active/inactive file system archive documents](#).

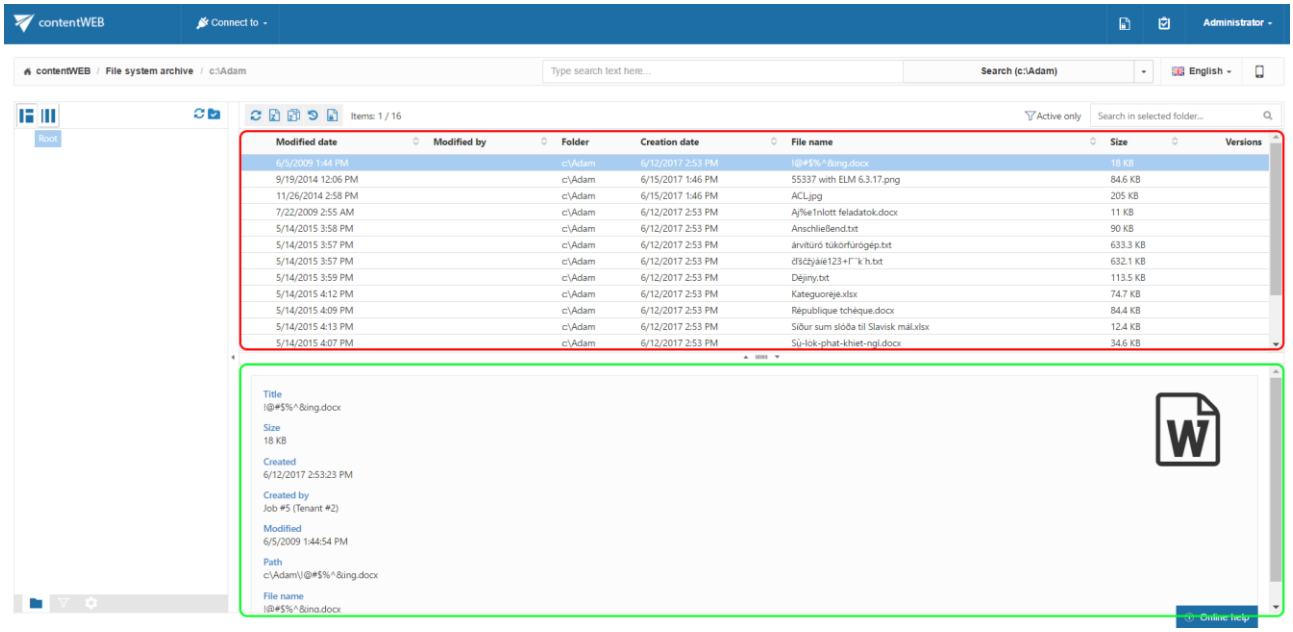


Note: This button is not available for Email Archive.

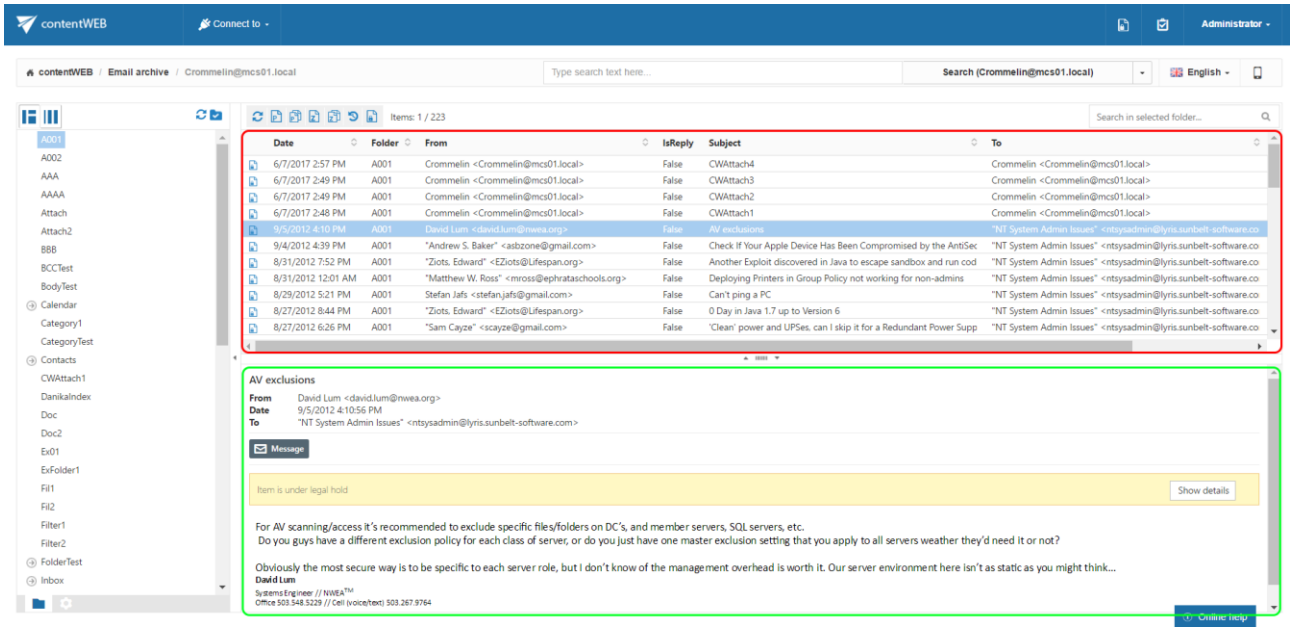
Item list and item preview

If a folder is selected in the navigation pane, its items are displayed in the list view. Each item has several columns. The available item columns are entity-specific and the items can be sorted by these columns (red frame). The administrator may define in the **Settings** (will be described further in section [Table view column configurations](#)) which columns will be visible and which will be hidden.

The item preview (extended metadata information/the body of emails) gets displayed by selecting the particular item from the list view (green frame).

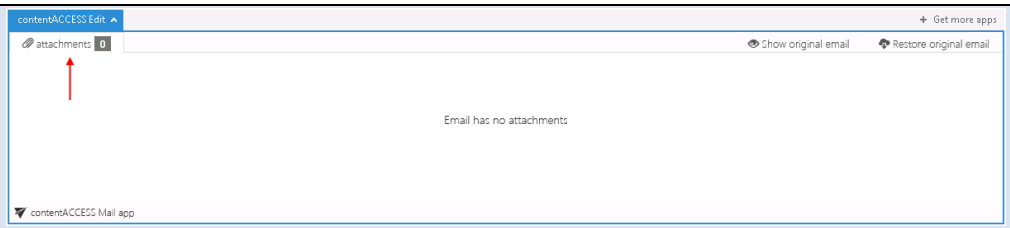


Files' item list and item preview



Emails' item list and item preview

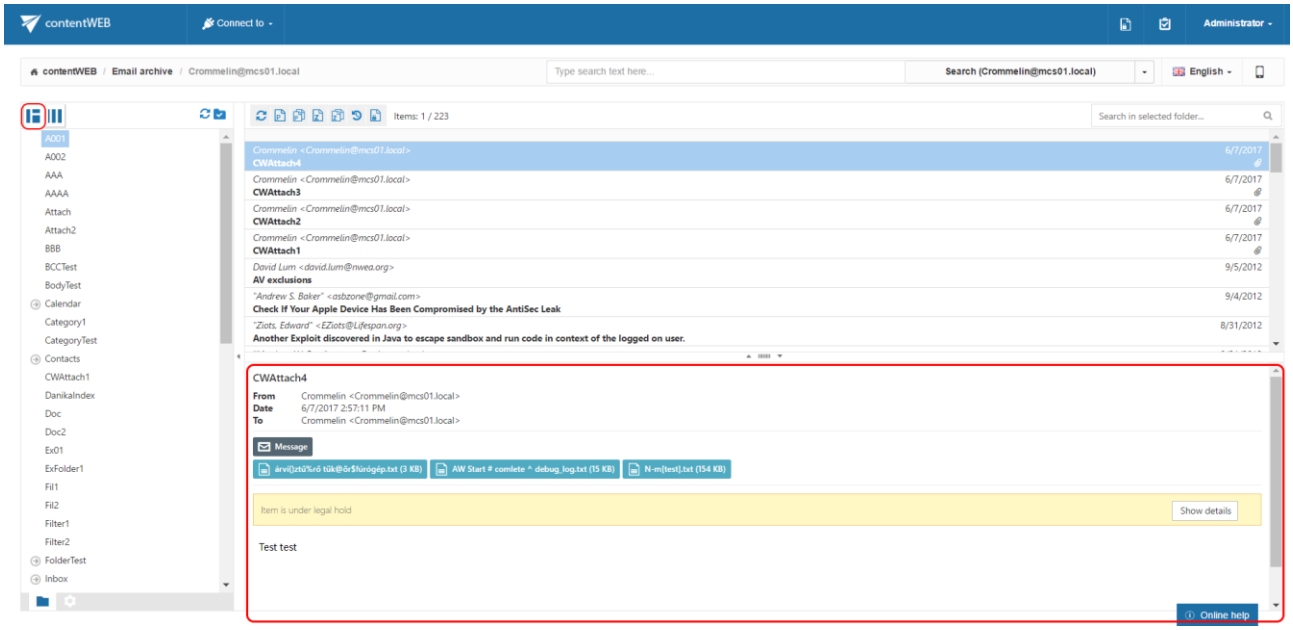
Note: The **Split attachments** option is active (checked) by default. That means that the body of the email and the attachment are stored separately. If the email message containing attachments has been archived by a job, where this option **was not checked**, our apps (MailApp, officeGATE, contentACCESS Mobile) will show 0 attachments. However, if you open the original email, the attachments are shown.



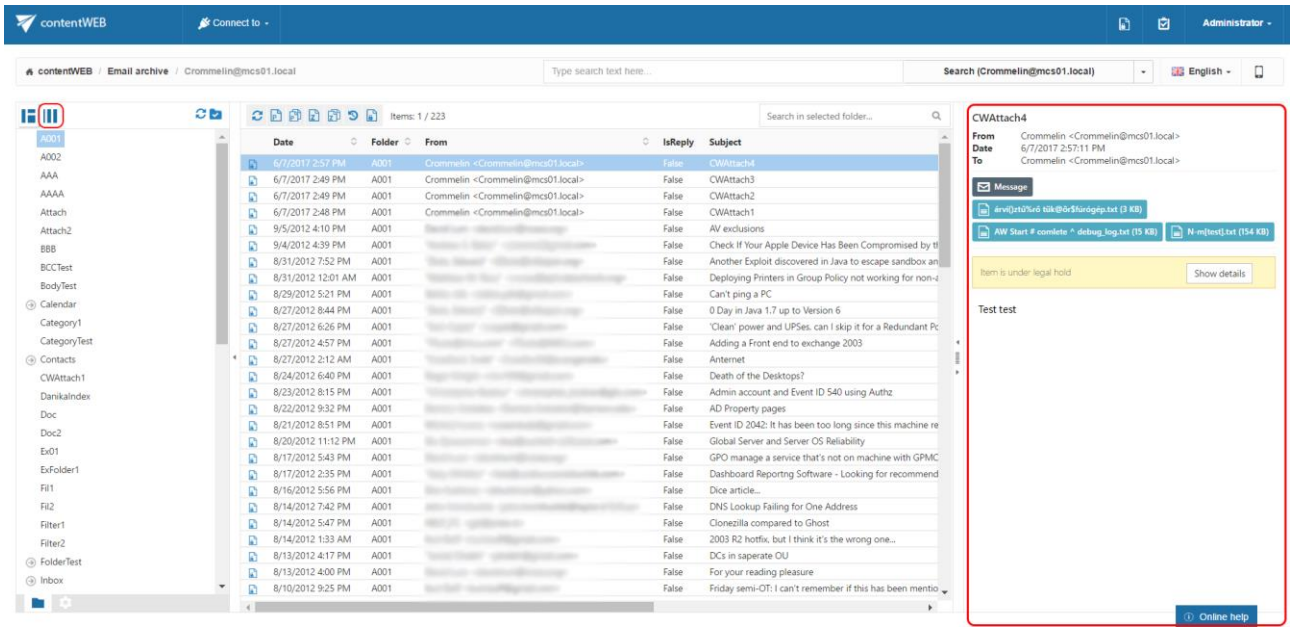
If this option **was checked**, but the email was containing embedded email (.msg attachment), this embedded email won't be displayed between the attachments in our apps.

Layout selector

From the layout selector menu (situated above the navigation pane on the left side) the user can choose from 2 kinds of layouts: the item preview can be situated either at the bottom of the view (Screenshot A), or on the right side of the view (Screenshot B). It depends on the user which option he prefers.



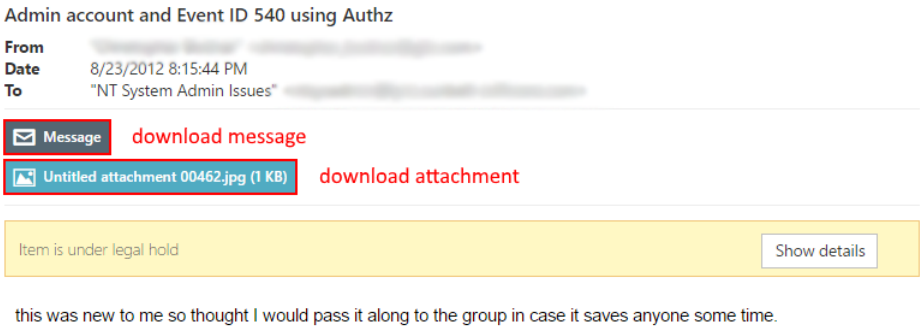
Screenshot A: Reading pane at the bottom of the view



Screenshot B: Reading pane at the right side of the view

Download from the item list/item preview in contentWEB

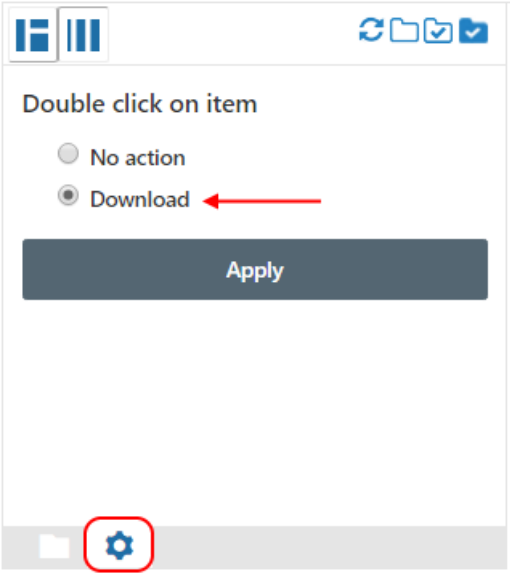
There are two ways how to download the items in contentWEB: a) First option is to click on the corresponding button in the item preview. The below displayed screenshots illustrate how it looks in the Email Archive (Screenshot A), and in the File System Archive (Screenshot B):



Screenshot A: Downloading an archived email/email attachment from the item preview

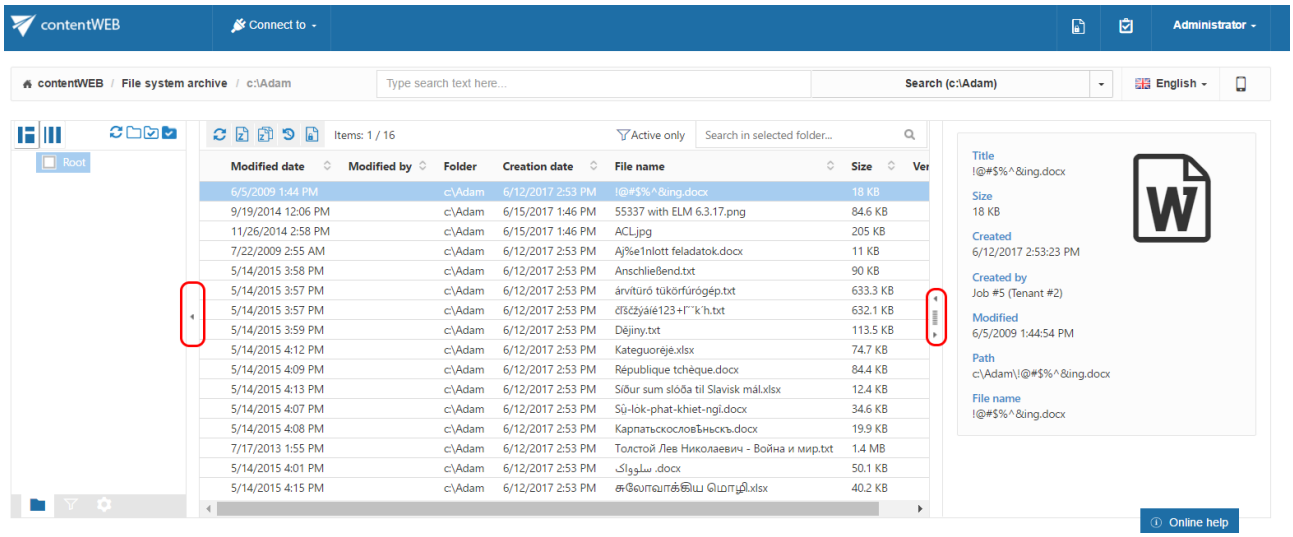
Screenshot B: Downloading an archived file from the item preview

b) The second (and easier) method of downloading the contentWEB item is to double click on it in the item list. With this option the selected item will be opened in a new tab and the user can save it. This option is configurable. To be able the download with this method, the following settings must be done: at the bottom of the navigation pane click on the cog mark ( ) and check the "Download" radio button. Then click "Apply". To disable double click download again, check "No action" radio button and click "Apply".



Hide/show function

The user interface is divided into 3-columns/sections. Any of these sections can be easily hidden with clicking on the small arrow marks ( ) as shown on the picture below:



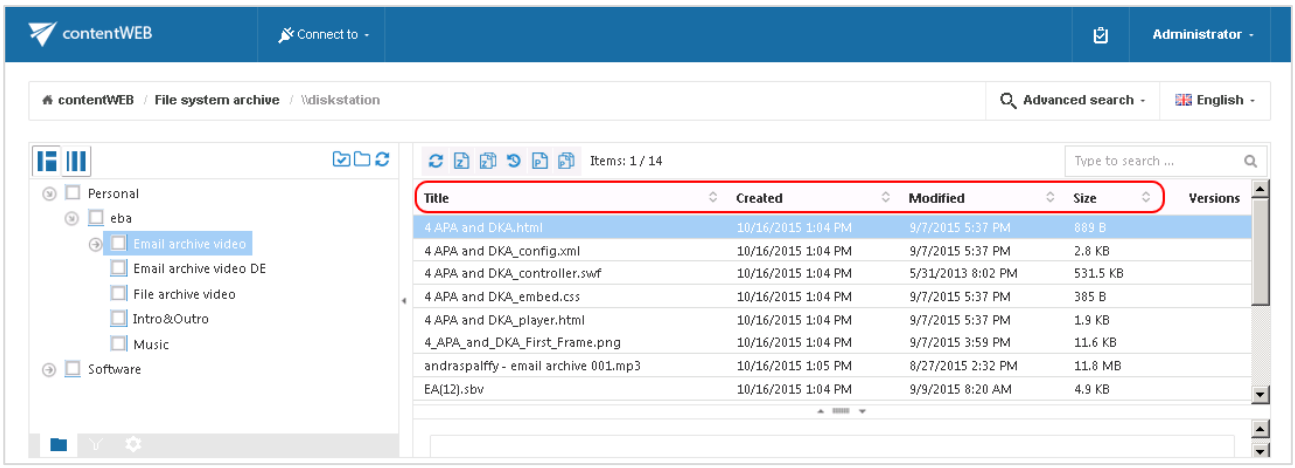
Sorting in contentWEB

The processed items can be sorted by the available item columns (displayed columns are configurable in the **UI settings**). With a click on the arrow sign (⇕) the user may sort them in the reverse order.

By default, the following columns are visible in **File Archive** system:

- ✓ **Title** – enables sorting according to file name;
- ✓ **Created** – enables sorting according to creation date;
- ✓ **Modified** – enables sorting according to modification date;
- ✓ **Size** – enables sorting according to size.

Note: The **Folders** column is available from the Advanced search view only.

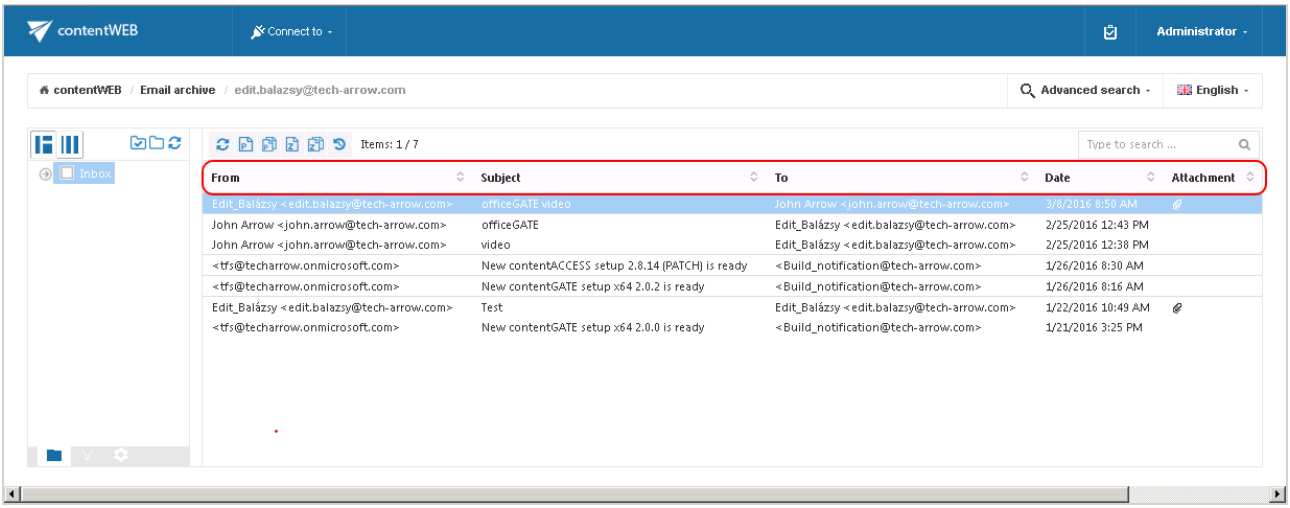


By default, the following columns are visible in **Email Archive** system:

- ✓ **From** – enables sorting according to the sender;

- ✓ **Subject** – enables sorting according to the subject;
- ✓ **To** – enables sorting according to the addressee;
- ✓ **Date** – enables sorting according to the sent date;
- ✓ **Attachment** – enables sorting based on email attachments;

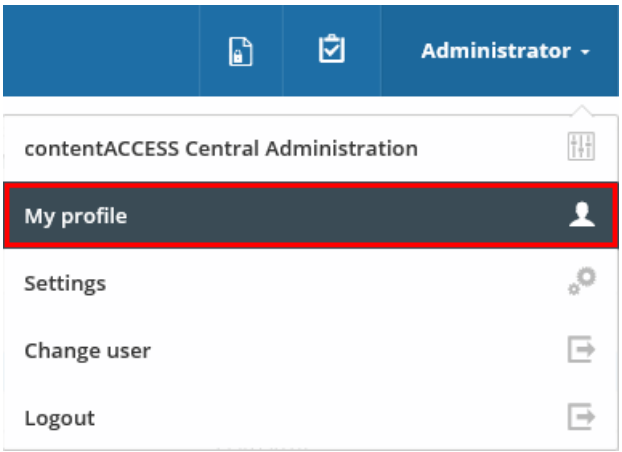
Note: The **Folders** column is available from the Advanced search view only.



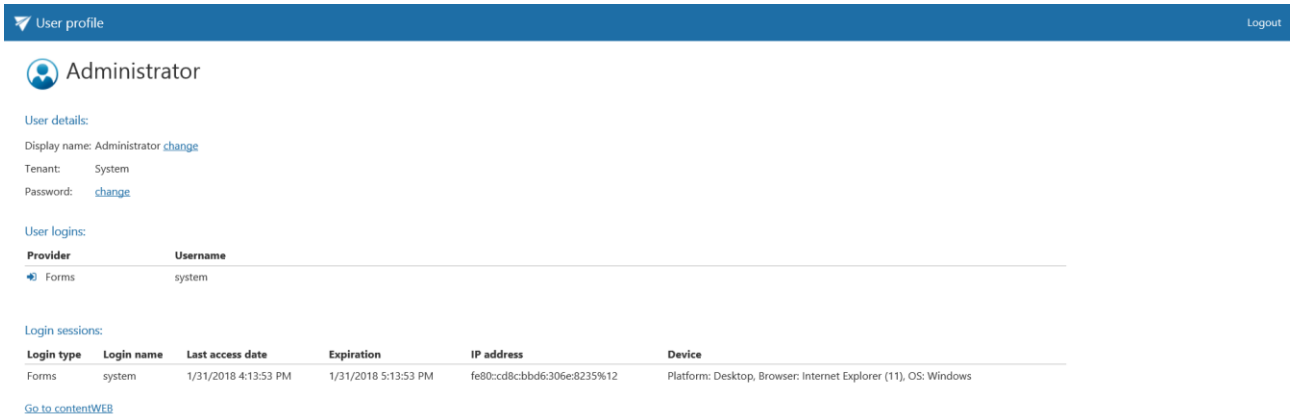
On the **UI settings** page, the system administrator may choose which columns will be visible in the grid for the given model. It is also possible to rename the columns and set them to sortable/non-sortable in case of need. For more information about these settings refer to chapter User interface settings of this guide.

User profile page

The user profile page is directly accessible for end users from contentWEB.

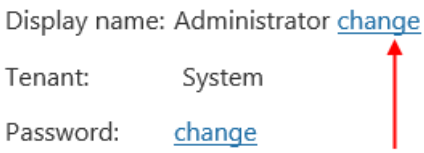


On the page it is possible to see the name, display name, tenant, user logins and login sessions of the current user. There are options to change the display name and the password. The user can also log out using the **Logout** button in the upper right corner. To return back to contentWEB, click on the Go to contentWEB under the list of login sessions.

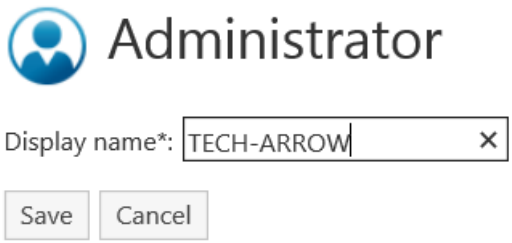


Changing the display name

- click on the change next to the Display name of the user

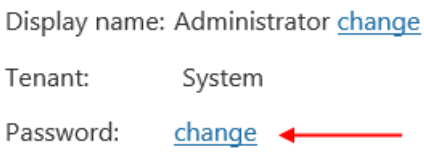


- type in the desired name and click on the Save button

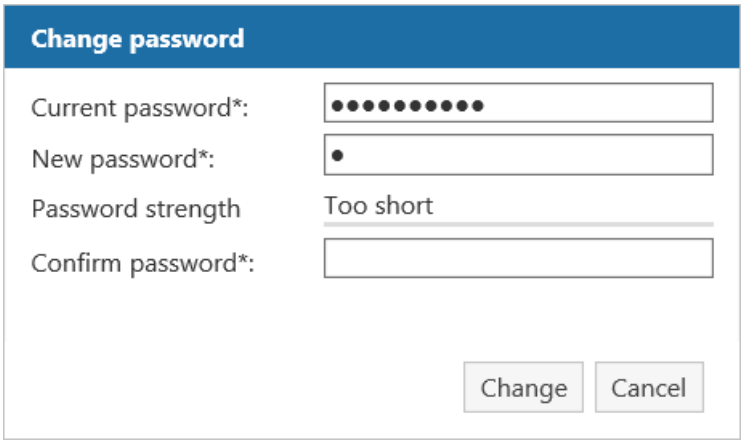


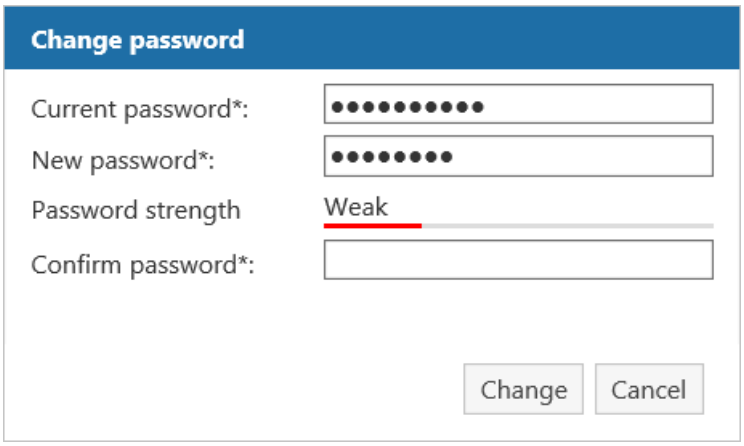
Changing the password

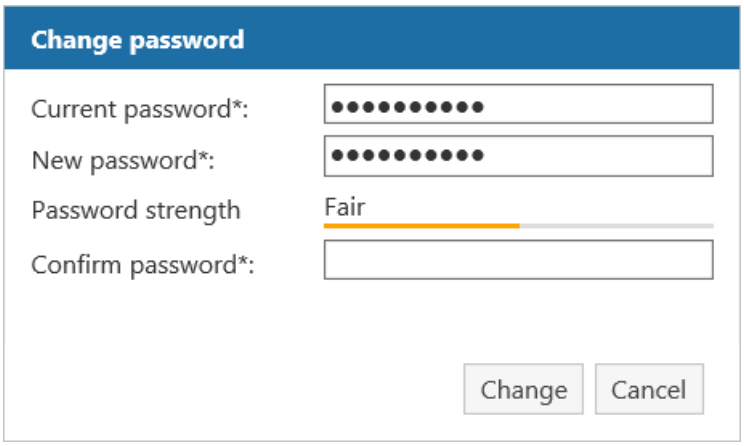
- click on the change next to the Password

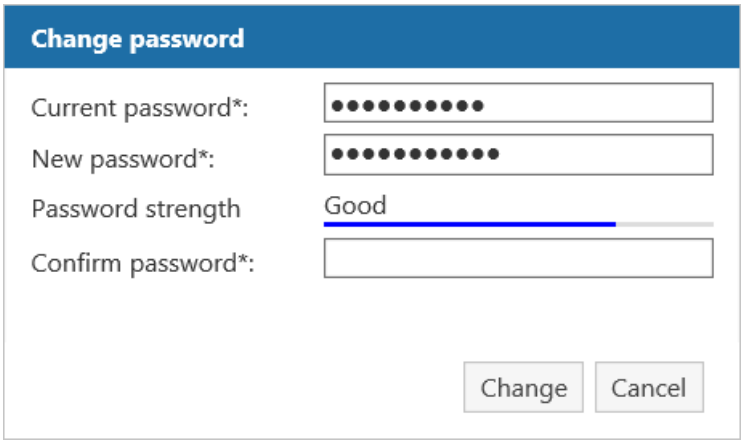


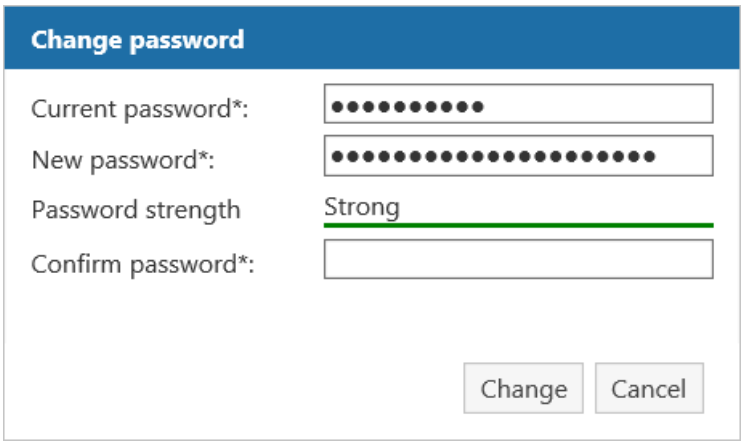
- type in the current password, the desired password and another time the desired password to confirm it (the new and confirm must match), then click on the Change button. The **Password strength** bar changes depending on the new password length, minimum character count is 8.


Change password
Current password*:
New password*:
Password strength
Too short
Confirm password*:
Change
Cancel

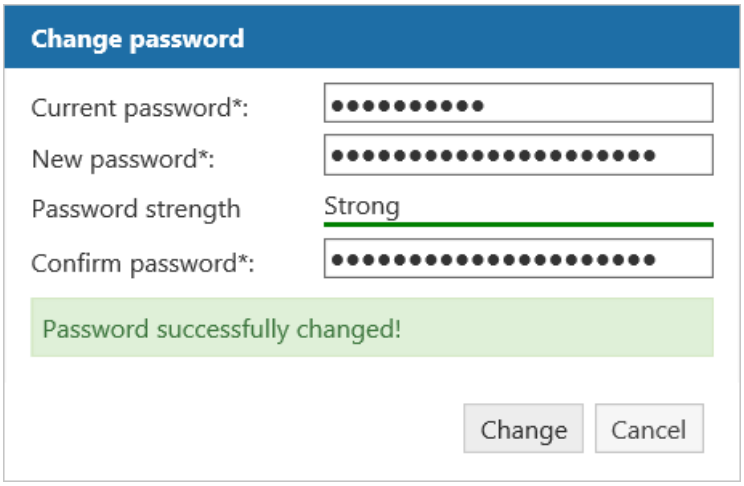

Change password
Current password*:
New password*:
Password strength
Weak
Confirm password*:
Change
Cancel


Change password
Current password*:
New password*:
Password strength
Fair
Confirm password*:
Change
Cancel


Change password
Current password*:
New password*:
Password strength
Good
Confirm password*:
Change
Cancel

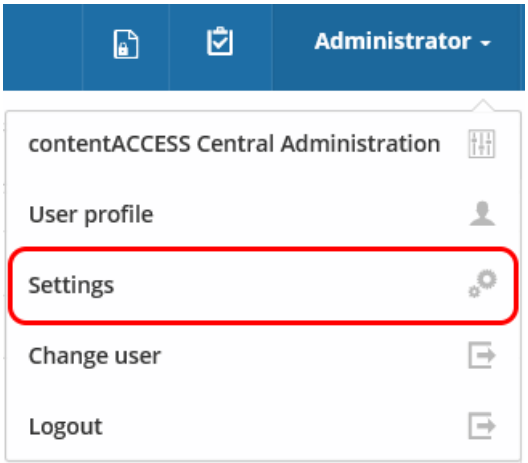


- if your password was successfully changed, a green notification bar will appear

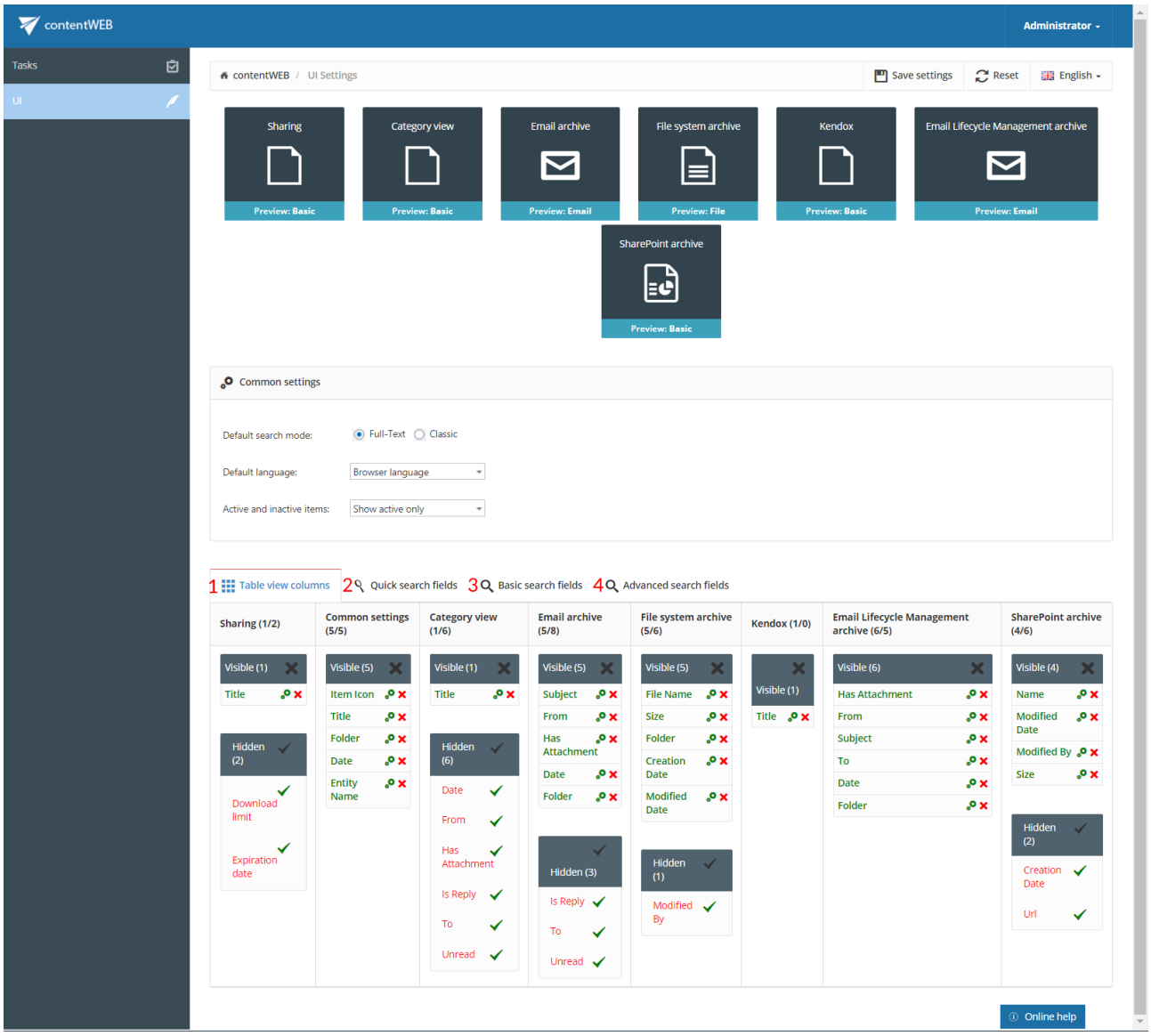


User interface settings

contentWEB's user interface settings are available on the **UI Settings** page. The page can be opened with clicking on the **Settings** menu item …



… and switching to **UI** in the left pane of the settings page.



The **UI Settings** page features the following configuration options:

Common settings – in this section setting that are common for all entities can be set:

- **Default search mode**

  The admin can specify what search mode will be used by default when a user searches in multiple models which support both full-text and legacy search. There are two options for this setting: Full-Text or Classic.

- **Default language**

The admin can set the default contentWEB language for the users. If the **Browser language** is selected and contentWEB supports that language (has a translation), it will use the users browser language. If contentWEB doesn't support it, then English will be used as default.

- **Active and inactive items**

The admin can set which items should be visible by default for the users. There are three options:

- Show active only
- Show inactive only
- Show all

Table view column configurations (1) – allows to set which columns will be displayed in the grid (in standard view and advanced search view)

Quick search fields (2) - quick search criteria may be enabled/disabled here

Basic search fields (3) – basic search criteria may be enabled/disabled here

Advanced search fields (4) – advanced search criteria may be enabled/disabled here

The default **UI Settings** table may be reset easily via the **Reset** button located at the top of the page.

If some changes are made, they need to be saved using the **Save settings** button in the upper right corner. If the user has made some changes without saving, he will be notified when leaving the page.

Quick and advanced search field settings are described in more details in chapter Editing Quick, Basic and Advanced search criteria of this guide. Now only the **Table view column configurations** will be described.

Table view column configurations

Table view column configurations allow to set which columns will be displayed in the item's grid.

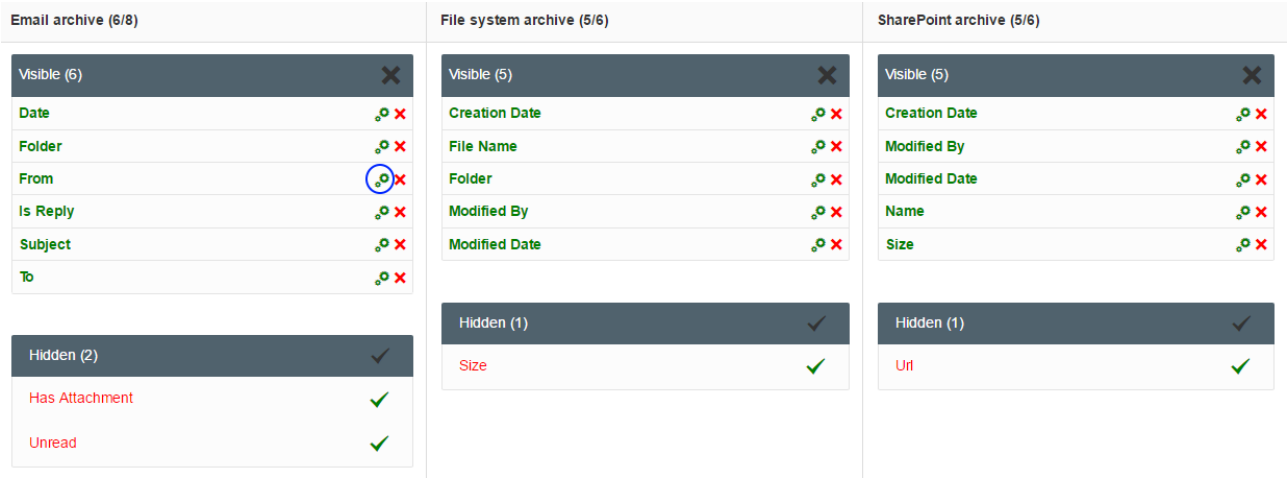
- **Hiding/Unhiding columns**

Visible columns may be hidden for a model (e.g. Email archive model) by clicking on the cross mark (✖) in the table of **Visible** columns. Clicking the check mark (✔) in the **Hidden** column makes it work the opposite way. Columns that were set to Visible/Hidden are shifted to the appropriate column in the grid.

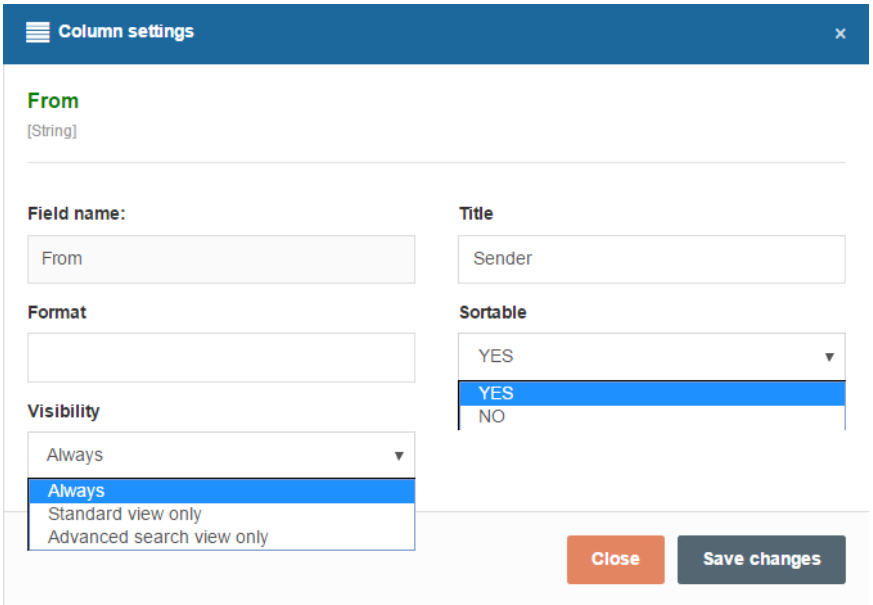
➢ Column settings

Column settings can be edited with clicking on the cog mark located next to the given column name (e.g. "From" as on the picture below).

Note: Only the visible column's settings can be edited.

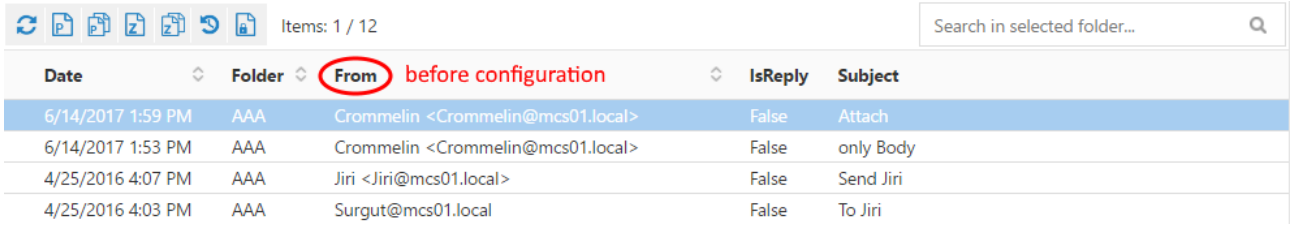


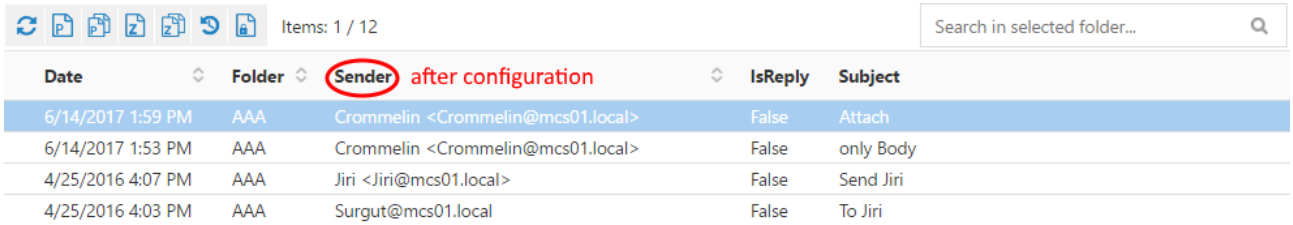
By clicking on the cog mark, the settings dialog of the selected column opens.



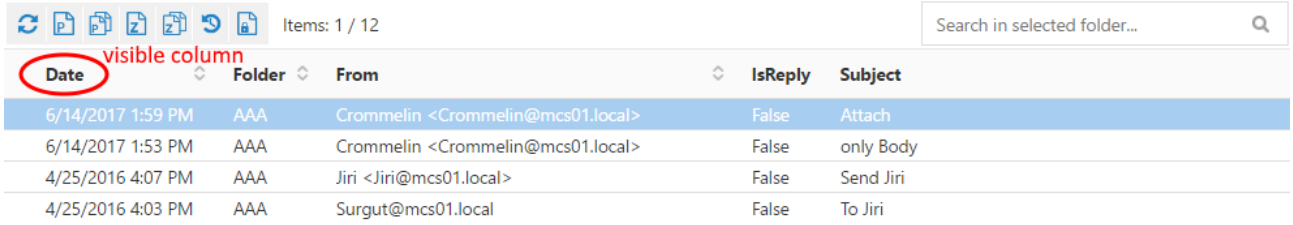
It is possible to configure the following values in this dialog:

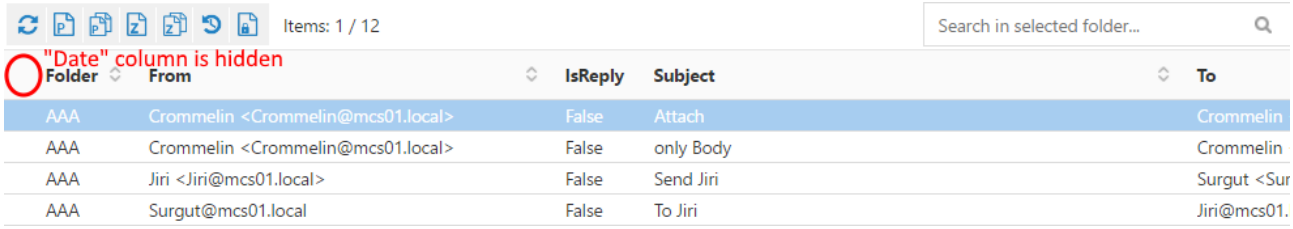
1. **Title** – allows to change the title of the column in the grid (e.g. *Sender* as on the screenshots)





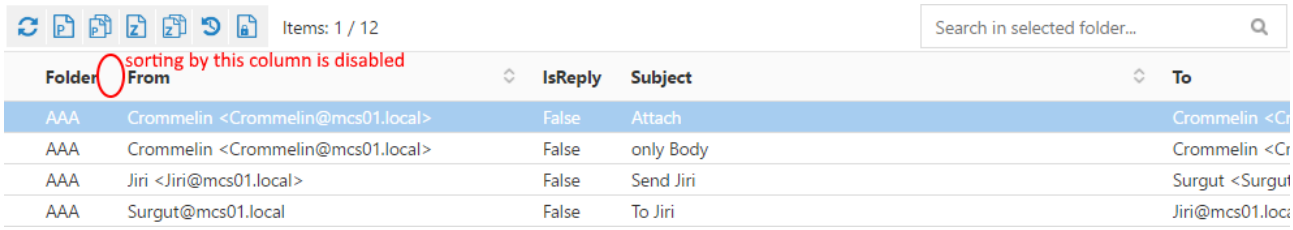
2. **Visibility** – allows to set in which views will be the given column available; in standard view, in advanced search view or always





Note: By default, the "From" and "Date" columns are turned on in the Advanced search view only.

3. **Sortable**- allows to set if the items will be sortable based on this column

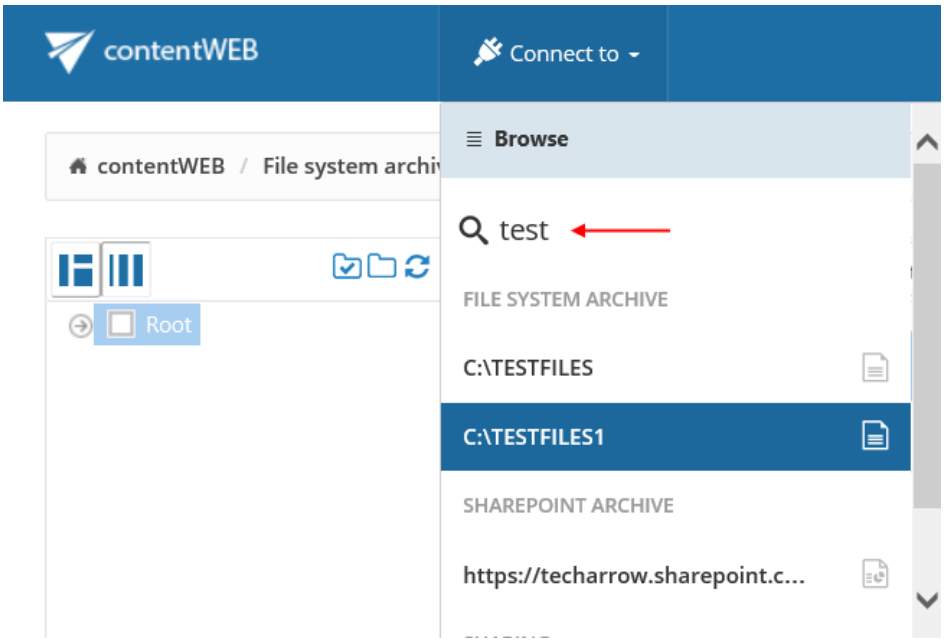


Search functions in contentWEB: "Connect to search", quick search, advanced search

The following chapters will describe how to use the search functions that are available in contentWEB.

"Connect to" search

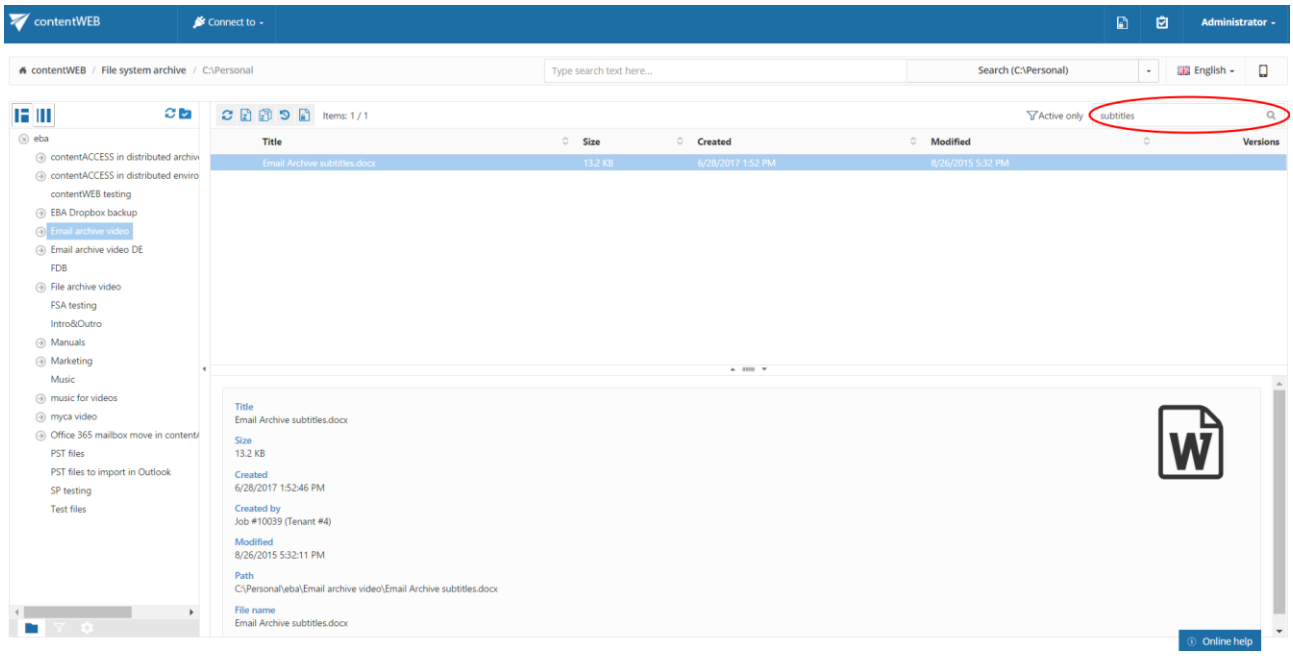
Click into the **Connect to** dropdown list and start to write the name of the entity that you would like to connect to. This search function will automatically filter out the entities by the partial name entered here.



Quick search

The quick search function of contentWEB enables searching only in one single folder – the folder that is selected in the left navigation pane in the tree view. Quick search supports only text-based fields (e.g. Title, Subject). To start the search, connect to the desired folder in the "Connect to" list and locate the desired folder/subfolder in the navigation pane. Then type the searched phrase into the search box located above the list view.

The quick search criteria may be changed in the UI settings. This will be detailed in chapter Editing Quick, Basic and Advanced search criteria of this guide later on.



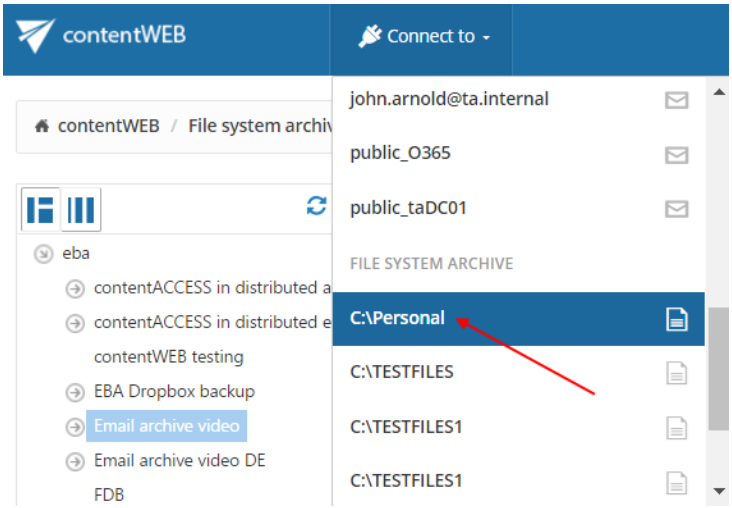
Searching for a document containing our Youtube video subtitles

Search criteria: **Root folder (entity)**: C:\Personal

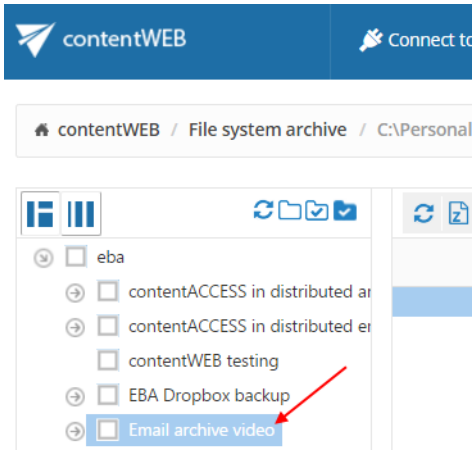
Archive subfolder: Email archive video

Title: contains phrase “subtitle”.

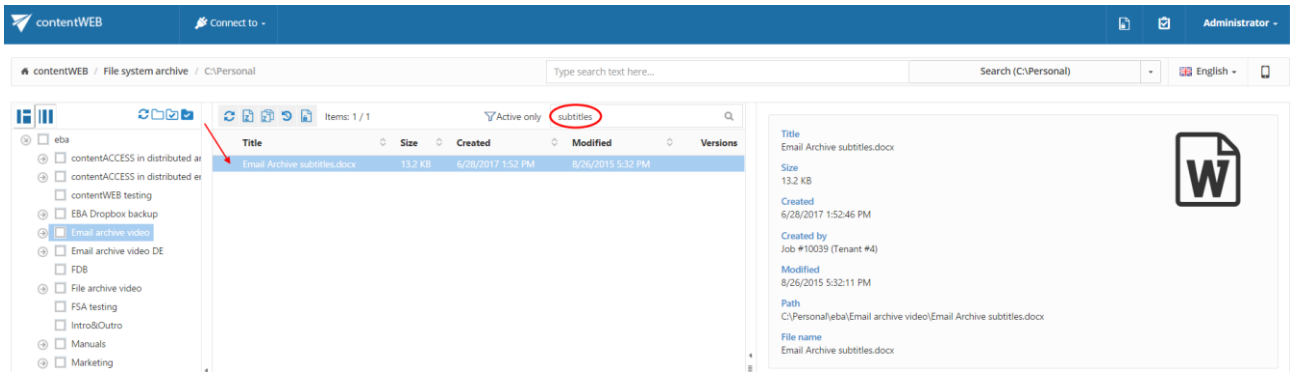
In this use case we will search for a document in subfolder **Email archive video** on the C:\Personal root. We connect to the root (C:\Personal) in the **Connect to** list first.



Further we select the given subfolder (*Email archive video*) in the navigation pane:



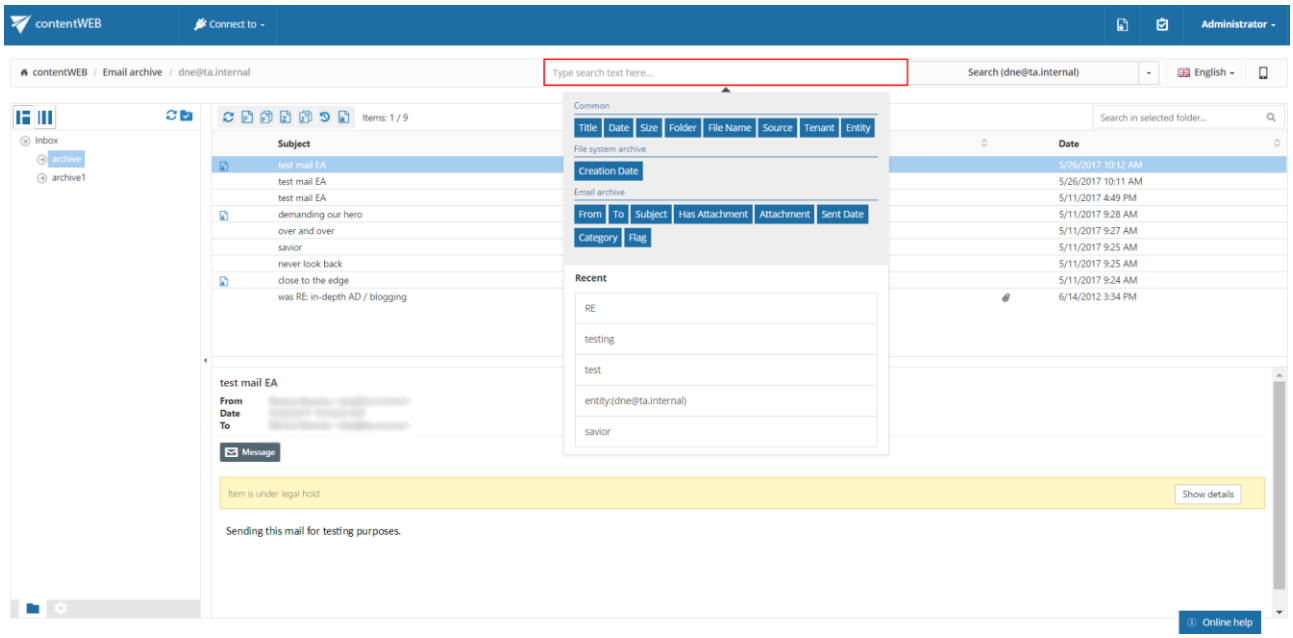
Now we type “subtitles” into the quick search field and the entry (entries) will be automatically searched for.



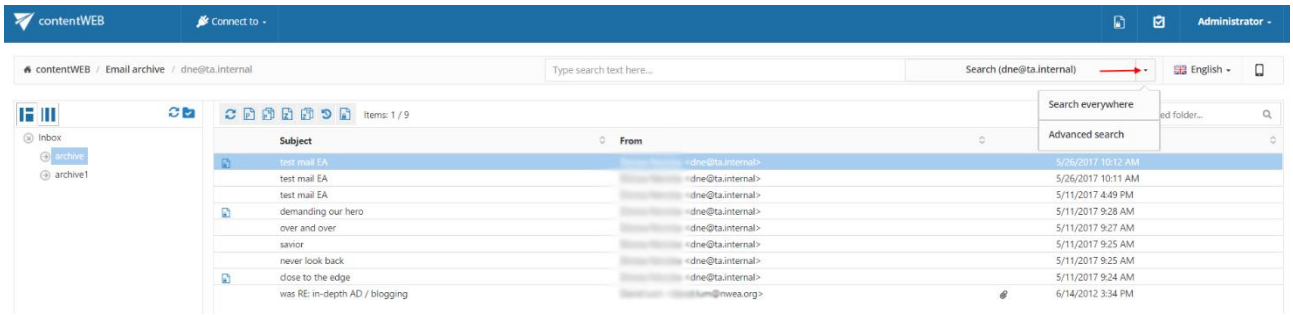
Fulltext search

The fulltext search allows the user to search in the entity, which he selected in the **Connect to** dropdown list – archived mailbox, File archive root or SharePoint archive root site.

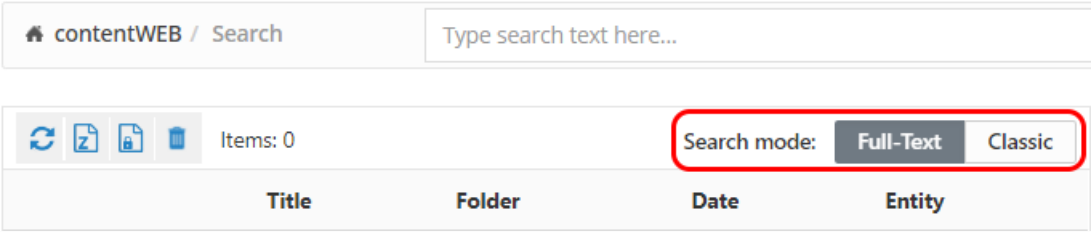
If you move your cursor over the **Type search text here...** field, a pop-up with some search filtering options and recent search will appear.



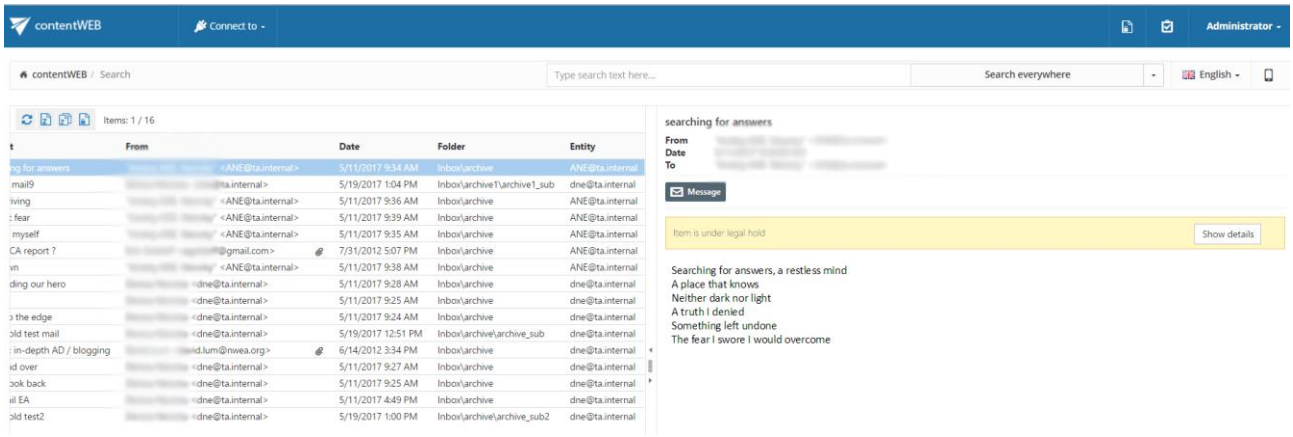
If the user has access to more than just one mailbox, he gets the option to **Search everywhere** – it will allow him to search in all of the mailboxes he has access to. If the user has access to only one mailbox, **Search everywhere** is not enabled.



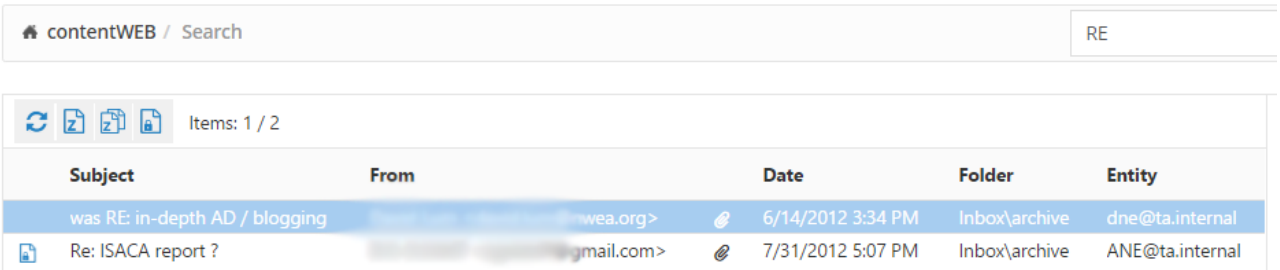
If the user does a search using **Search everywhere** and there are models which support **Fulltext search** and also those which don't, a search mode selector will be visible. If the user selects **Full-Text**, it will search only in models which support **Fulltext search**. If the user selects **Classic**, it will search in models which support only the classic legacy search.



In this case, the user has access to entities **dne@ta.internal** and **ane@ta.internal**



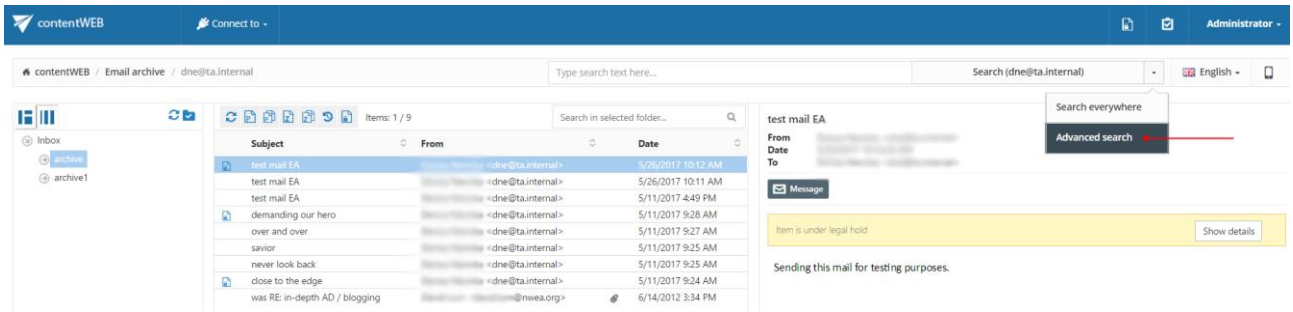
so if the user searches for a phrase or applies a filter (requirement) that more items of the mailboxes meet, it will look like this:



Advanced search

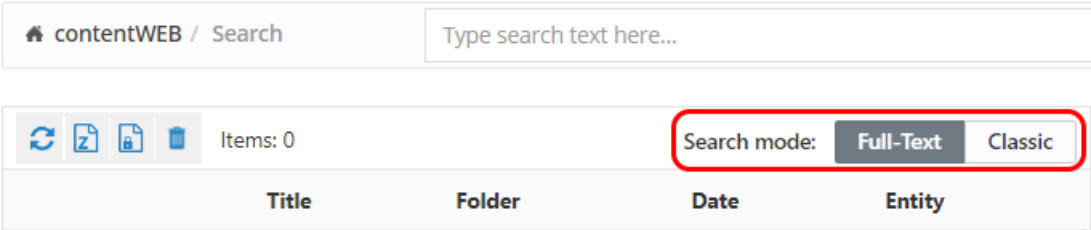
With the advanced search function the user may search in one or multiple entities simultaneously according to one or multiple search criteria. With advanced search it is not allowed to search in one folder only. It crawls the whole folder structure of the selected entity/entities.

To start Advanced search, connect to an entity in the **Connect to** list. Then choose **Advanced search** option from the dropdown list on the right side of the user interface.



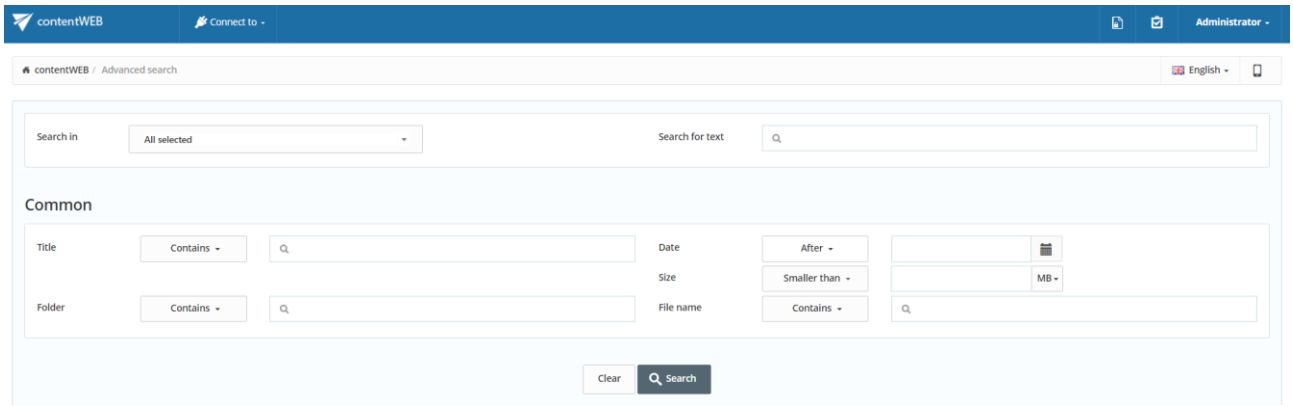
The **Advanced search** page will be loaded. Unroll the **Search in** dropdown list and select the entities (mailboxes/root folders) to be crawled. **Search in** filter lists all available mailboxes/roots on which the logged on user has the necessary access permissions.

If the user does a search using **Advanced search** and there are models which support **Fulltext search** and also those which don't, a search mode selector will be visible. If the user selects **Full-Text**, it will search only in models which support **Fulltext search**. If the user selects **Classic**, it will search in models which support only the classic legacy search.



By using the advanced search criteria, the user may decide if documents with the identical name will be searched for (use the "**Equals**" filter), or also documents with this partial name will be searched for (use the "**Contains**" filter).

The range of parameters that can be set differs based on what kind of entity does the user **Connect to** (File archive, Email archive, SharePoint archive...). Here on the screenshot below the parameters common for all kind of entities can be seen.



contentWEB enables advanced searching based on criteria set in the **UI settings**. For more information refer to the Editing Quick search and Advanced search criteria subchapter of this guide.

Searching for an email message containing the phrase "the edge"

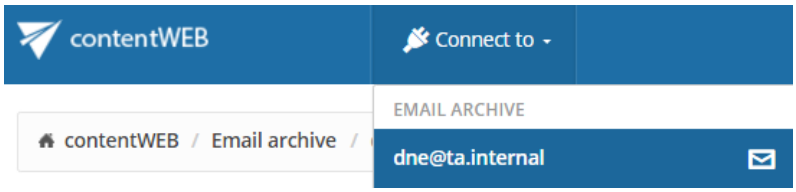
Search criteria: **Mailbox**: dne@ta.internal

Date range: 10.06.2012 – 30.06.2017

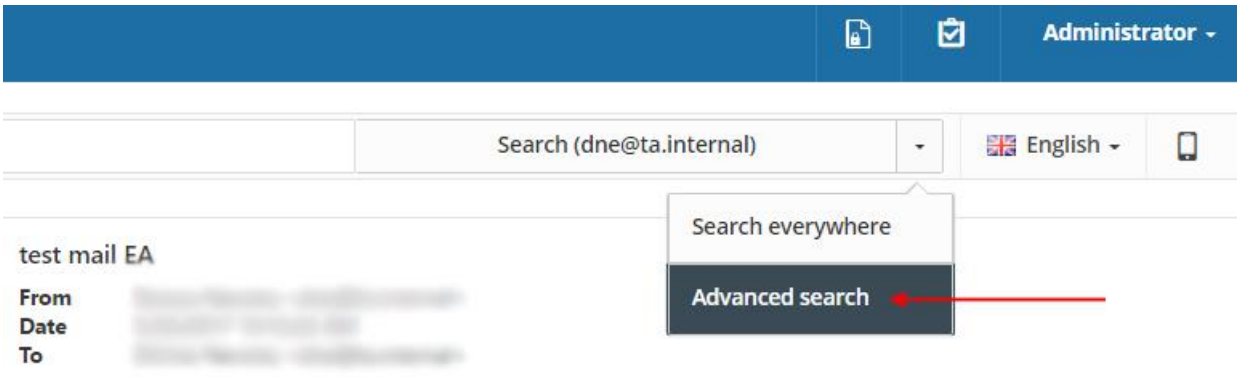
Subject: contains phrase "the edge".

As we need to search for an item based on a non-textual value (date range), and we would like to search for the item according to multiple search criteria (date range and subject), we need to use the **Advanced search** of contentWEB.

To start advanced search, connect to the archive mailbox of dne@ta.internal in the **Connect to** list.

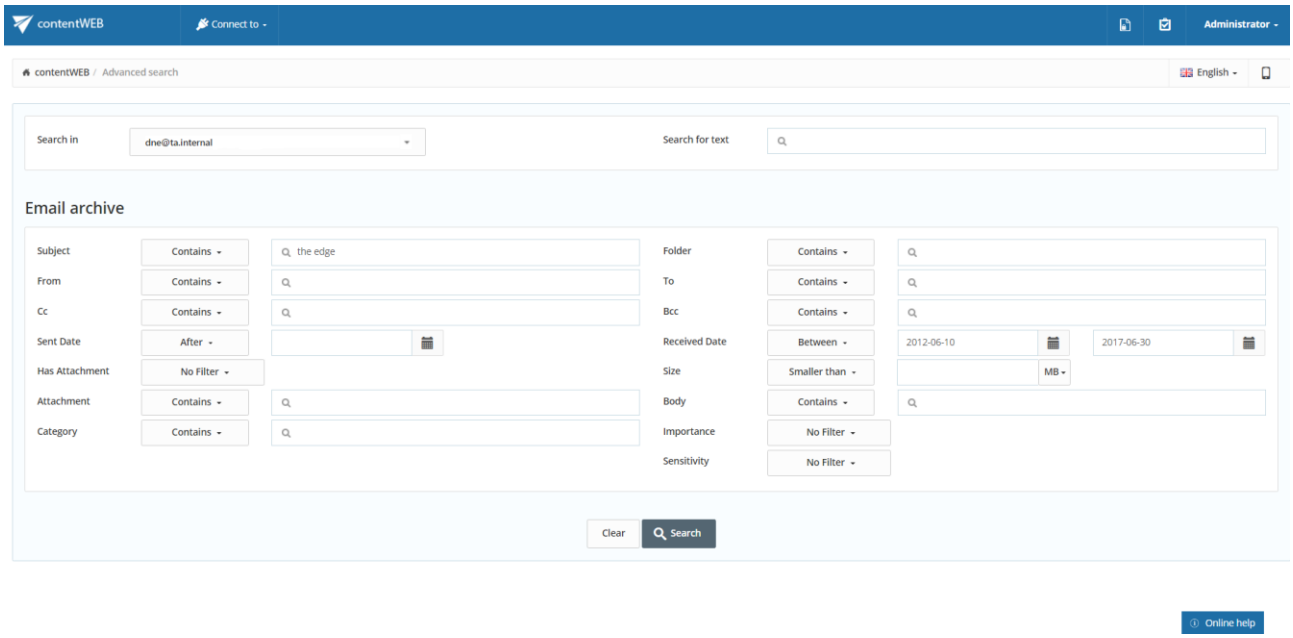


Select **Advanced search** option from the dropdown menu in the right upper part of the user interface.

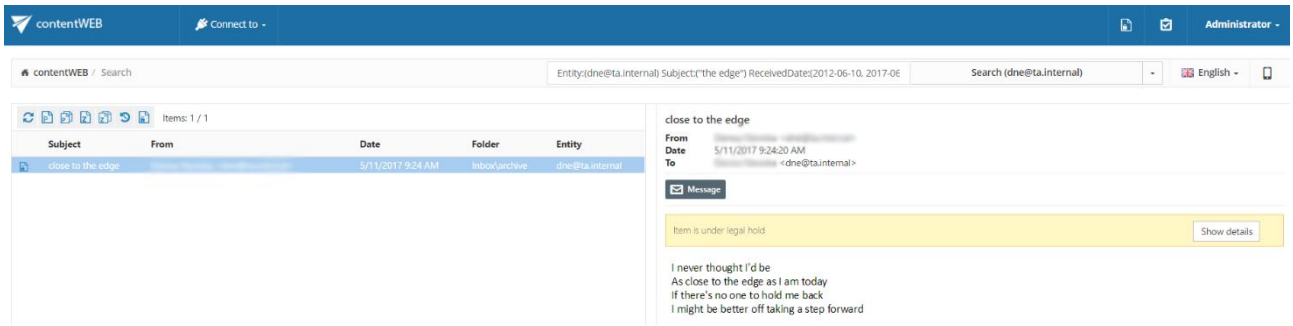


Specify the desired criteria:

1. From the **Search in** dropdown list the user may select multiple archive mailboxes (root folders in case of file archive), on which he has access permissions. Now we are searching only in mailbox dne@ta.internal that we have selected in the **Connect to** list.
2. As we are searching for emails with subject containing "the edge", we enter this phrase into the **Subject** text box.
3. We are searching for emails in date range **10/06/2012 – 30/06/2017,** so we select **Between** from the **Receive Date** dropdown list. Then we specify the desired date range and click on **Search**.



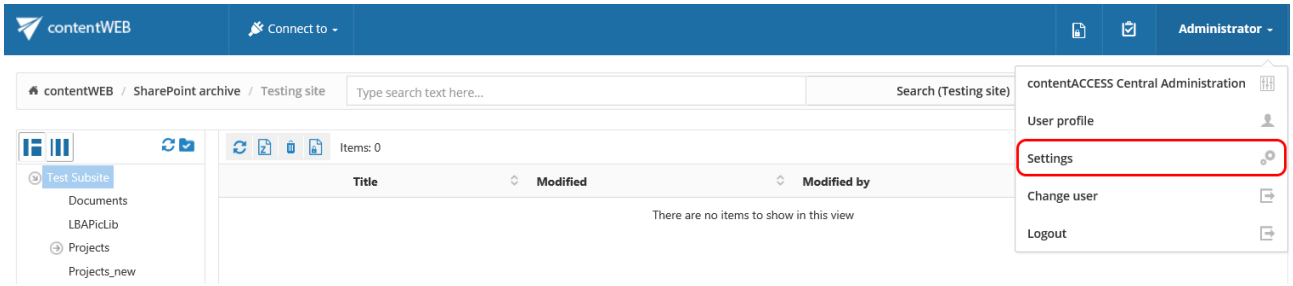
The desired file has been found as displayed on the picture below:



Note: In the search view the **Folder** column is automatically displayed as well. This feature simplifies the identification of the file location in the folder structure. The administrator may configure, which columns should be displayed in search view. This configuration is further described in chapter [Table view column configurations](#) of this guide

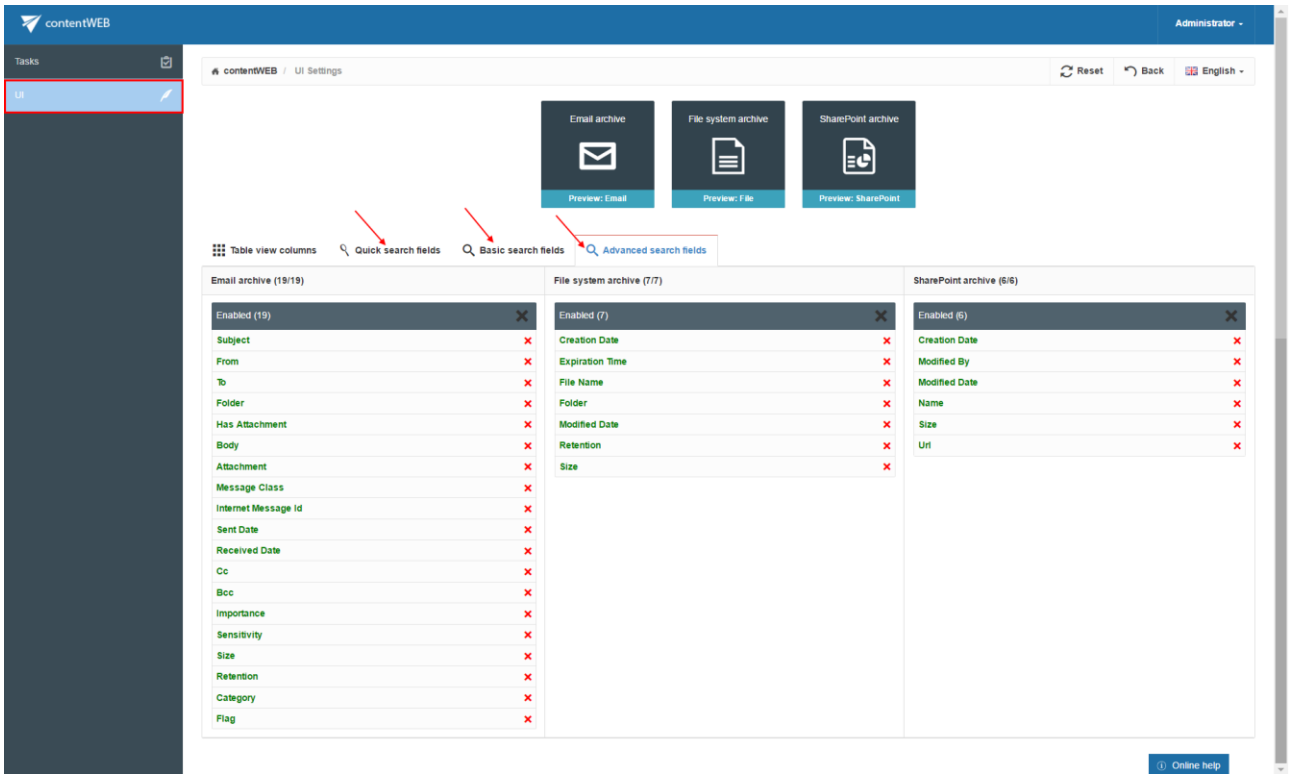
Editing Quick, Basic and Advanced search criteria

The search criteria that the contentWEB quick search and advance search use may be edited by the system administrator. To edit these criteria, open the **Administrator** menu and click on **Settings**.



Switch to **UI settings** with clicking on **UI** in the left panel. Open the

- **Quick search fields** tab to edit the search fields that the quick search uses
- **Basic search fields** tab to edit the search fields that the basic search uses
- **Advanced search fields** tab to edit the search fields that the advanced search uses

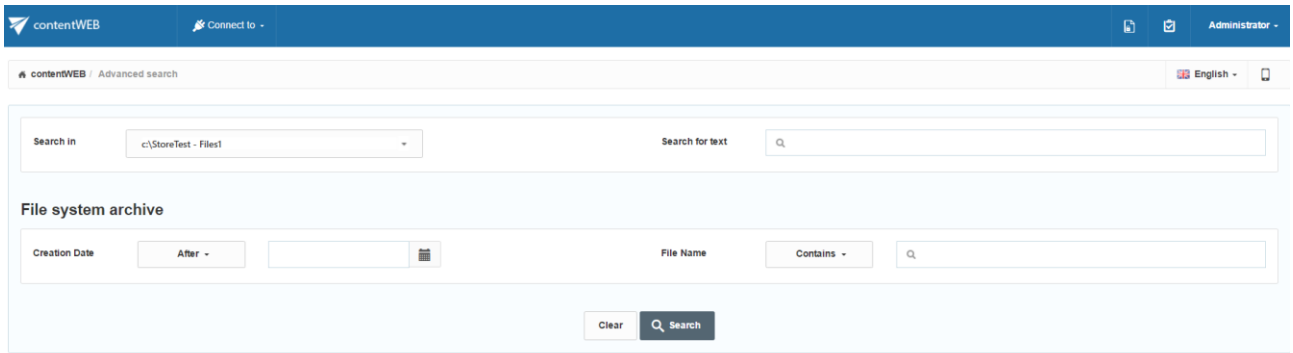


New search fields may be enabled/disabled for the available models (Email Archive, File Archive etc.) by clicking on the

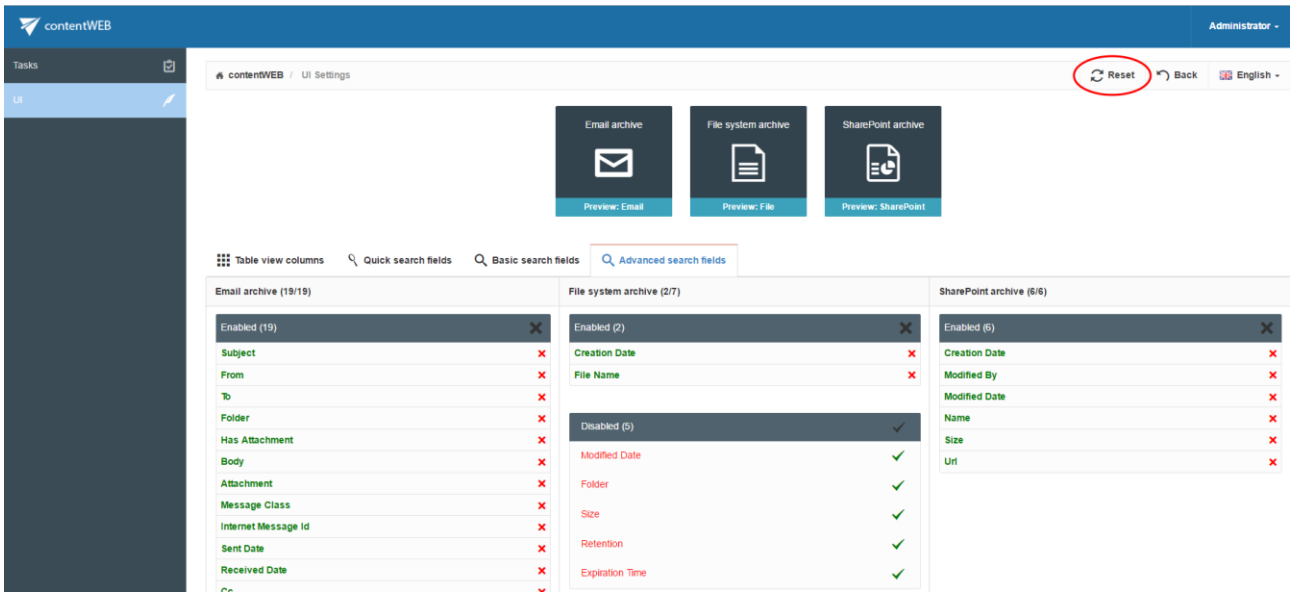
- check mark (✓) – means enable
- cross mark (✗) – means disable

next to the given model's field.

The enabled search fields will be added to/ the disabled fields will be deleted from the **Advanced search** menu's search criteria.



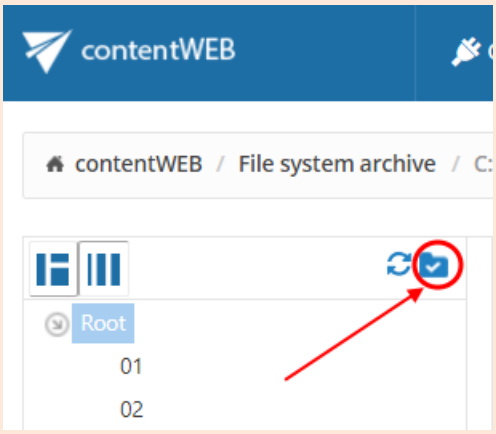
The default search field settings can be reset by clicking the **Reset** button on the **UI settings** page:



Folder selection methods

In the following subchapters we will describe how multiple folders/items may be selected in the contentWEB pane/in the items grid. Any operations may be started on multiple items/folders that are selected. These operations are described in more details in section [Tasks supported by different entities](#).

Important: To select a folder, first click the button **Enable folder selection**.



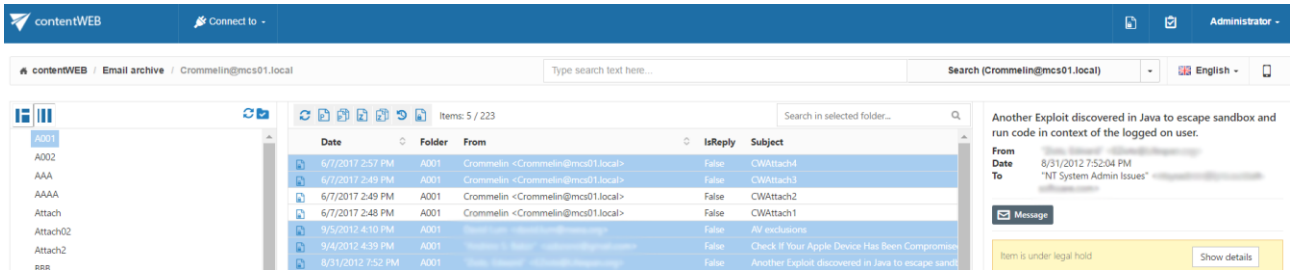
Multi-selection

Multiple item selection:

If the user would like to perform any operations on the contentWEB items from the grid (item list), he can **select multiple items** for processing.

The user may select multiple items **in the item's grid** with

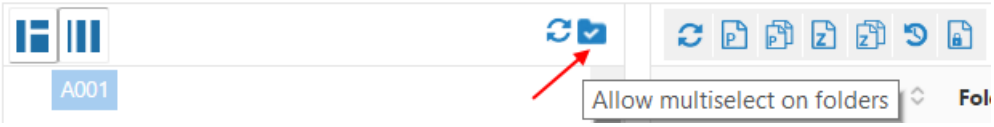
- holding down the CTRL/SHIFT keys and selecting multiple items to process (like on the picture below);



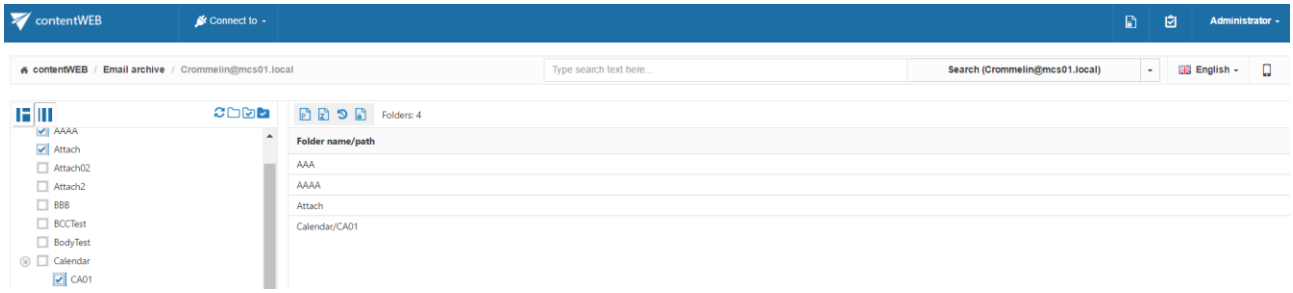
- CTRL + A - with this function the user may select the first 200 items from the grid.

Multiple folder selection:

An action can be run in parallel either on one or on multiple folders. First, you need to **Enable folder selection**.



To **select one or multiple folders for processing,** check the checkbox(es) next to the desired folder(s) **in the navigation pane.** The selected folders' paths will be displayed in the grid. Now you can run the desired action on the selected folders at one go.



Recursive folder selection

First, folder selection must be enabled.

Then the user may select the

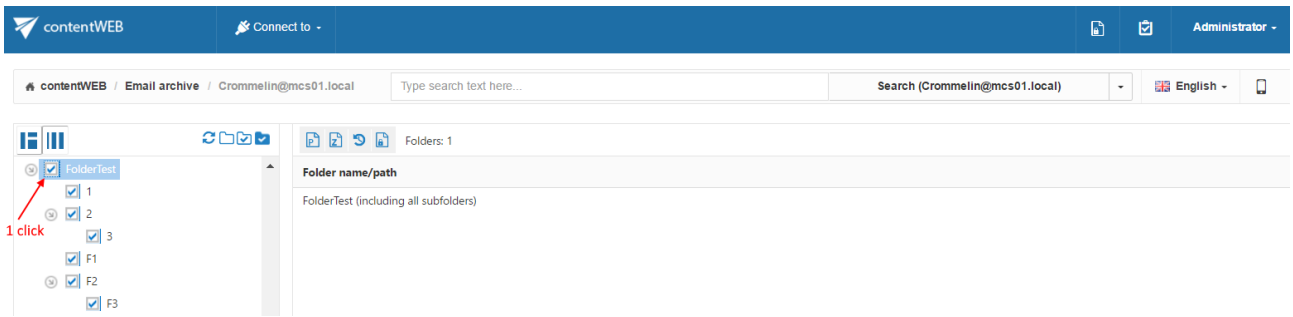
- **Entire folder structure** – by a) a **single click** into the checkbox of the main parent folder or b) using the **Select all folders** button
- **Recursive folder structure starting from a parent folder** – by a single click on the parent subfolder in the contentWEB's navigation pane.

By **double clicking** the parent folder's checkbox, **only the parent will be selected**, on **third click the already selected folder will be deselected.**

Selecting the entire folder structure:

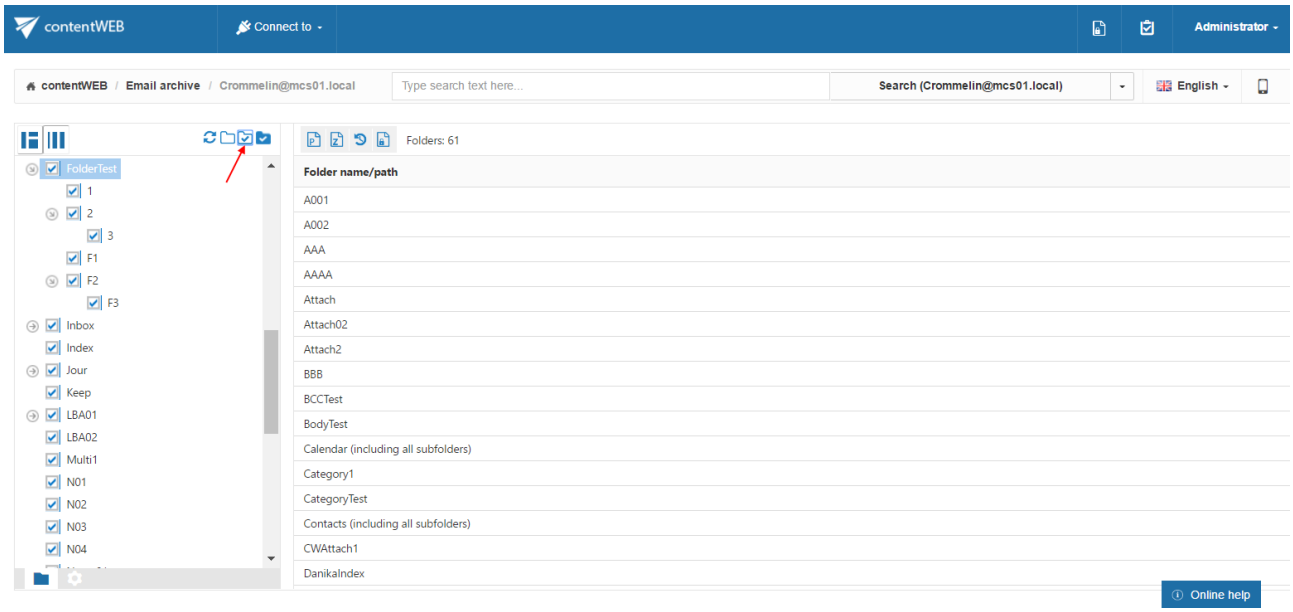
The user may select the **whole recursive folder structure by**

- **a single click** into the checkbox of the main parent folder. The information that the subfolders have been also selected is involved in the grid, and the path is marked with a black color.



Screenshot: Selecting the whole recursive folder structure using the single click option

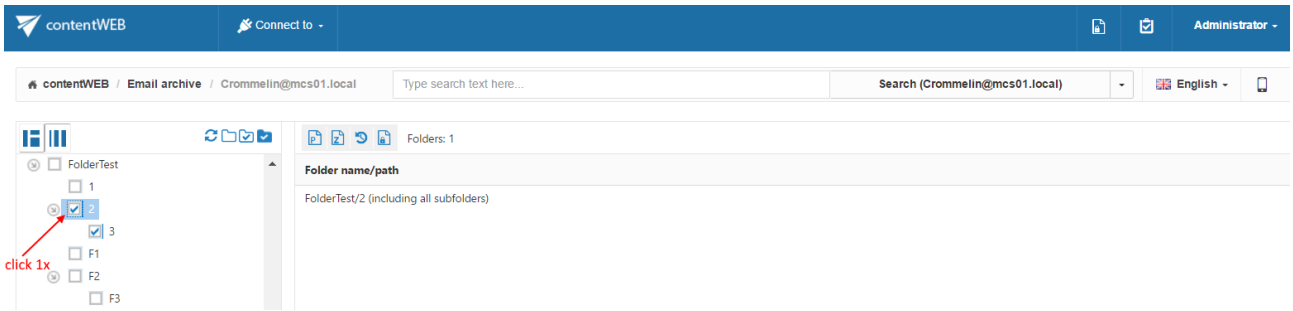
- Clicking on the **Select all folders** icon above the contentWEB pane:



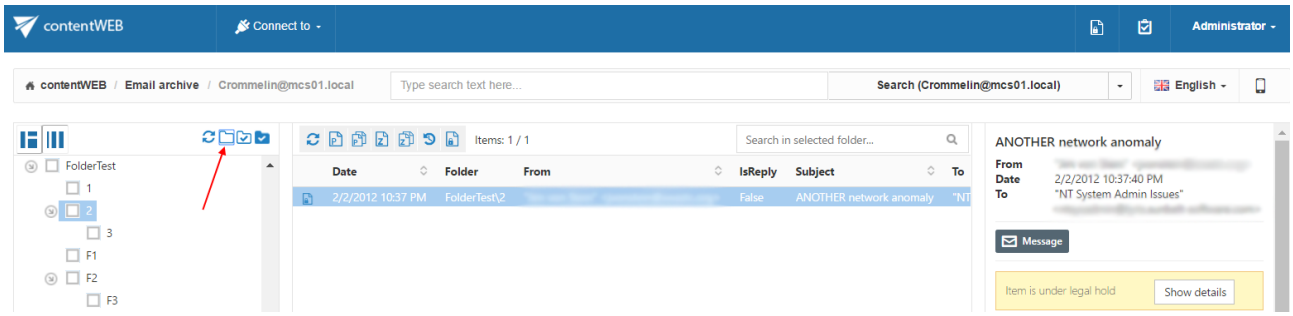
Screenshot: Selecting the whole recursive folder structure using the **Select all folders** icon

Selecting a recursive folder structure starting from a parent folder: The user may select a folder structure starting from a parent folder

- with clicking **1x** into the checkbox of the **given parent folder** (e.g. 2 on the picture below):



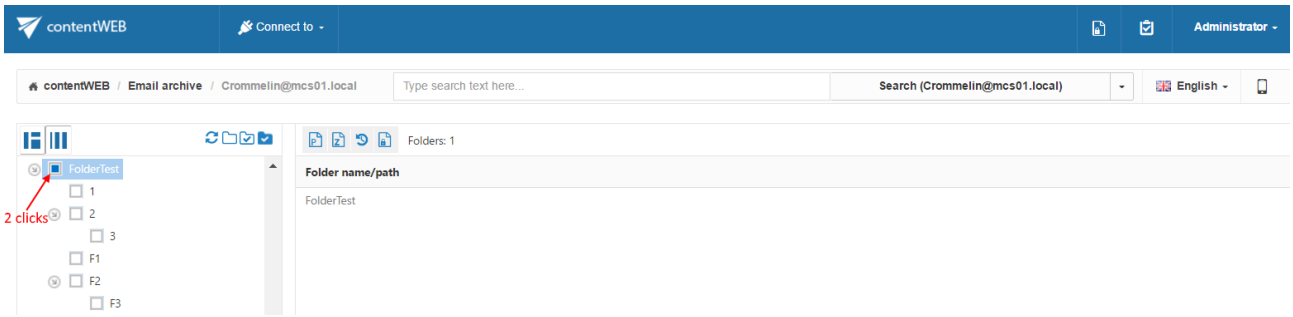
- use the **Deselect all folders** icon above the contentWEB pane to deselect all already selected folders:



Screenshot: Deselecting the whole recursive folder structure using the **Deselect all folders** icon

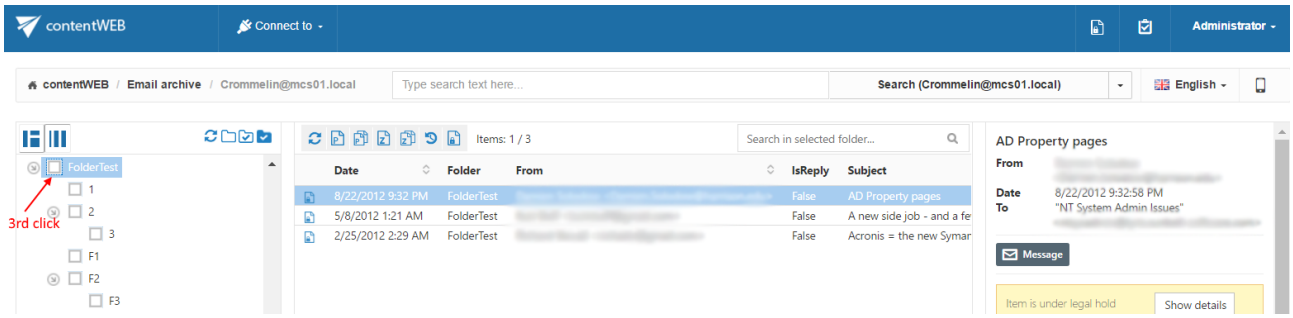
Selecting the parent folder without its subfolders:

If the user wants to exclude the child folders from processing and would like to process the **selected parent folder** only, he has to **click the parent folder twice** as illustrated on the below displayed screenshot. In this case, the folder path will be marked with a grey color in the grid.



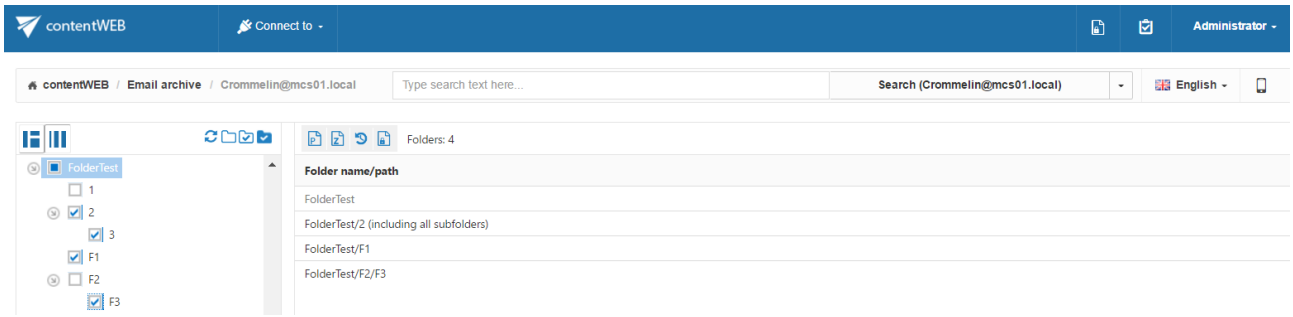
Screenshot: Selecting the parent folder by double-clicking the check box

On **third click** the **parent folder will be** automatically **deselected**. The same can be achieved by clicking the **Deselect all folders** icon above the pane.



Screenshot: Deselecting the parent folder on third click

It is also possible to select the parent folder and only some of its child folders. To achieve this, double click the checkbox of the parent folder and check the checkboxes of those child folders that you would like to select.



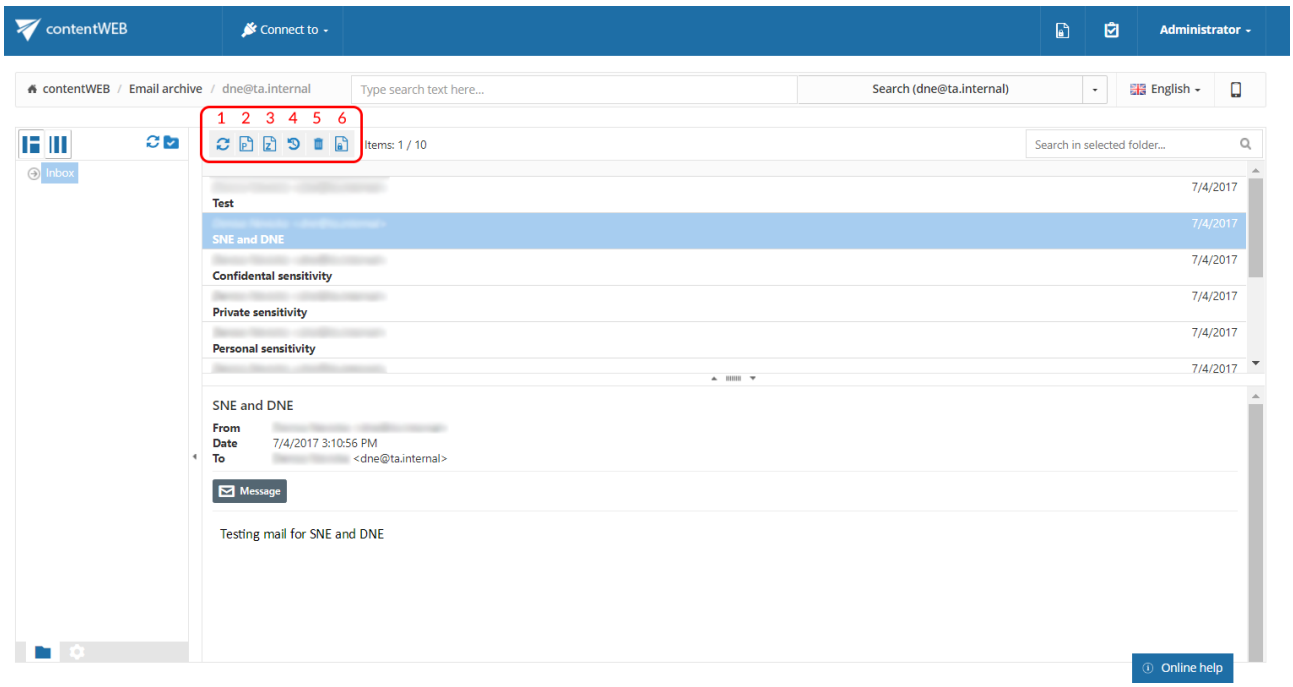
Screenshot: Selecting the parent folder and some of the child folders

Tasks supported by entities (models)

The tasks that are supported in contentWEB are entity-specific. The available tasks can be triggered using the appropriate toolbar buttons located above the items grid. There are 6 different tasks that can be run using these buttons, namely:

1. **Refresh** – the button is used to manually update the item list;
2. **Export to PST** – exports selected mailbox items/folders or all items of the selected folder into Outlook PST format;
3. **Export to ZIP** – exports selected items/folders or all items of the selected folder into a compressed ZIP format; emails are saved as MSG files and are compressed to ZIP format
4. **Recovery** – recovers selected items, folders or the whole folder structure, if they were deleted from the original location (either from the mailbox or from the file system). Recovery works for the Email Archive and File system archive only.
5. **Delete** – allows to mark/unmark documents for/from delete
6. **Legal hold** - allows to create a legal hold case, where the user can put documents afterwards. Documents which are under a legal hold case can't be deleted from the system until the legal hold case expires.

Toolbar buttons are available from the search page, too.



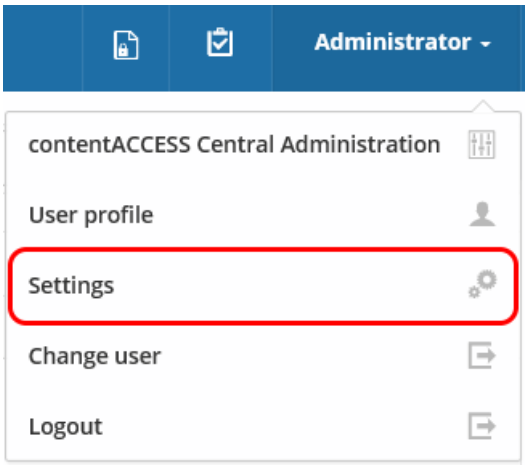
Screenshot: Toolbar buttons used to trigger Email archive tasks

Note: For more information regarding these functionalities in File System Archive and Email Archive read sections File Archive tasks and Email Archive tasks of this guide.

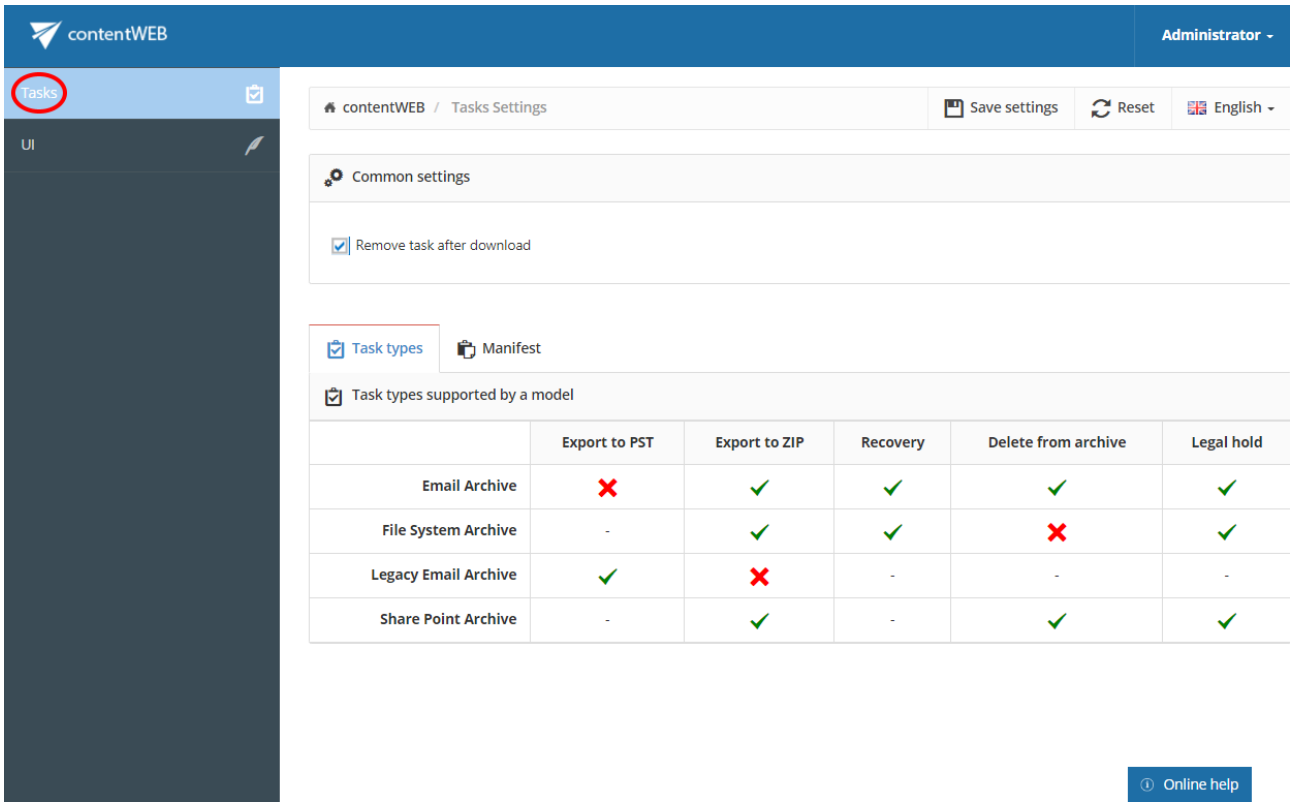
Enabling/disabling tasks

By default, all tasks available for an entity are enabled. However, the system administrator may configure if some tasks should be disabled/enabled for a given entity. This can be done from the administrators' settings page.

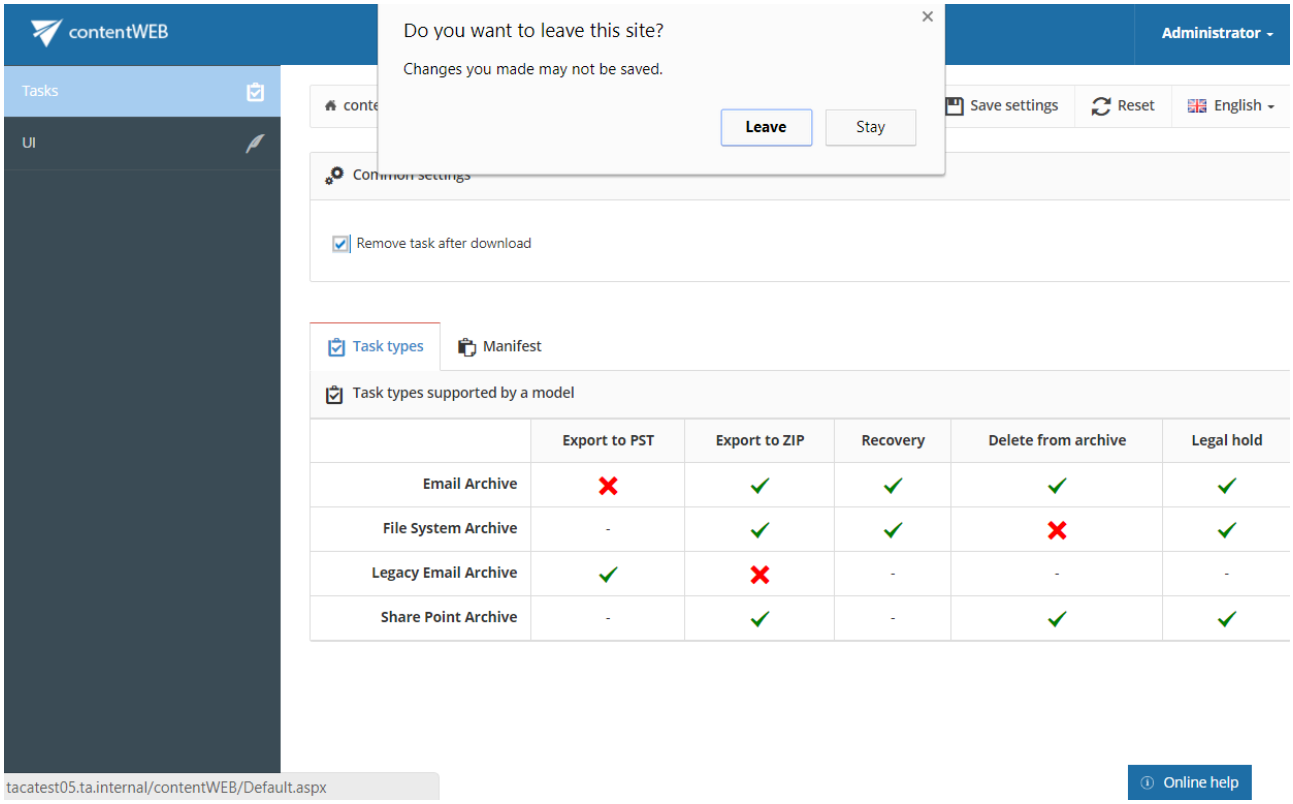
To open the page, navigate to the logged on user in the right upper part of the header bar, open the dropdown menu and click on **Settings**:



On the **Task types** tab the tasks enabled/disabled by an entity (model) can be seen. With clicking on the cross mark (✗) the administrator may enable a particular task; with clicking on the check mark (✓) he may disable the task again.



If some changes are made, they need to be saved using the **Save settings** button. If the user has made some changes without saving, he will be notified when leaving the page.

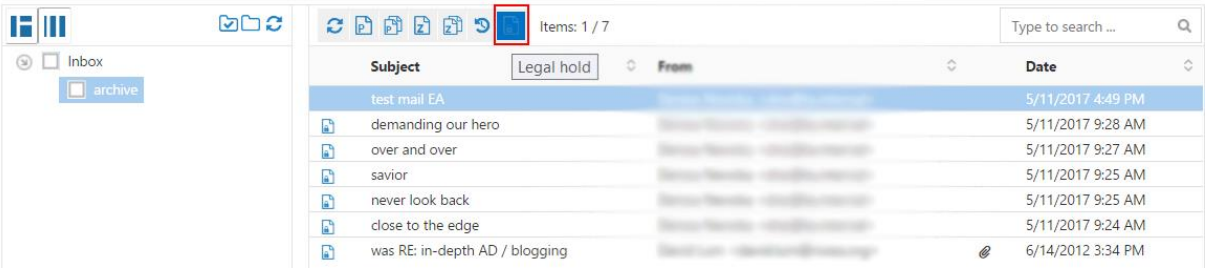


Legal hold

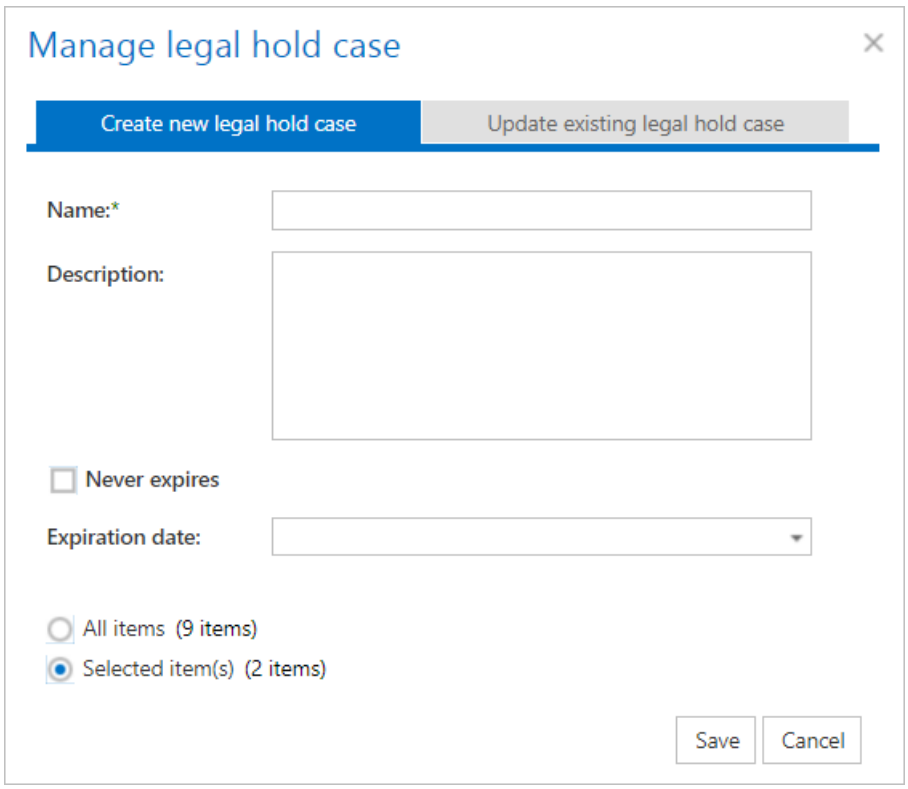
To learn about configuring Legal hold, please read this section first.

The document can be put into a legal hold case from:

- Selection (selecting one or more items or folders)
- Search result



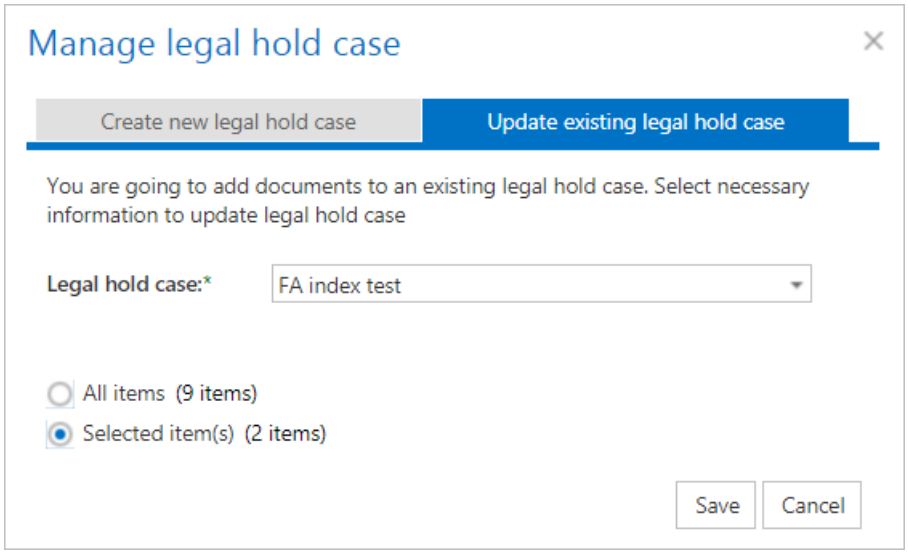
After some items are chosen and you click the **Legal hold** button, a pop-up will show up.



Here you can set a legal hold case. Name and expiration date are required. By checking the **Never expires** checkbox, the expiration date disappears. Radio buttons on the bottom indicate which items

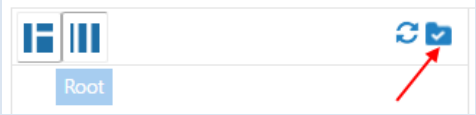
should be included into legal hold case (all items means all items in the folder that is selected in contentWEB).

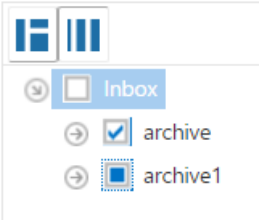
It is also possible to add items to an already existing legal hold case. If you wish to do so, select the option **Update existing legal hold case** and choose the case you want to add your item(s) to, then click **Update**.



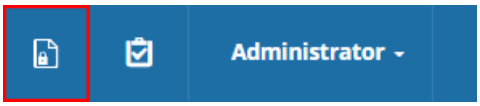
You can create a legal hold case if you select a folder from the tree on the left side. There are 2 possibilities. First is when you click the checkbox and a checkmark appears in the box. It indicates that all documents in the folder will be processed recursively. Second is when you click 2 times on the checkbox, then a square appears, which means that only document on the first level in the folder will be processed.

Note: The folder selection must be enabled first.





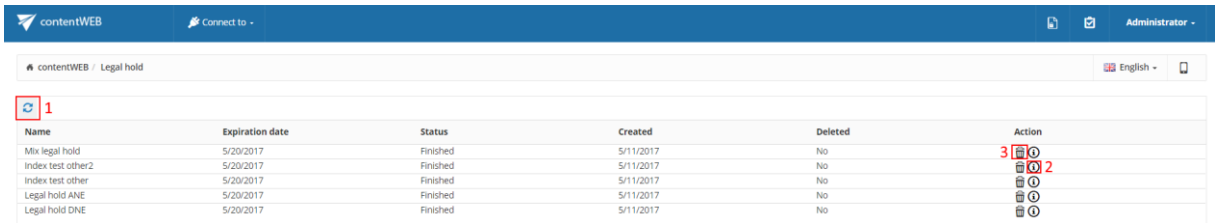
The list of cases can be accessed from the upper right corner of the page, by clicking on the **Legal hold** icon.



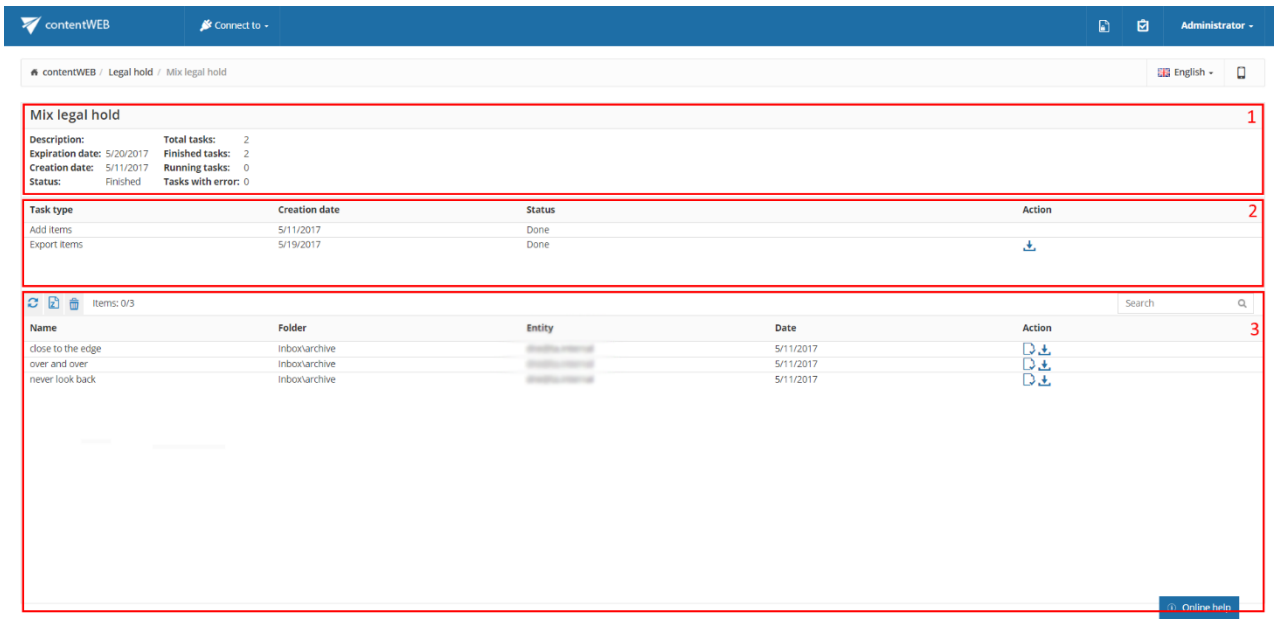
The Legal hold view and management is controlled by the system's permission management, so only people with the correct permissions can manage or view legal hold cases and documents.

In the Legal hold cases page you can manage the existing legal hold cases, manually delete them or see details of the legal hold case including the document list. If an expiration date is specified for a legal hold case, then the system will automatically remove the legal hold from documents on case expiration.

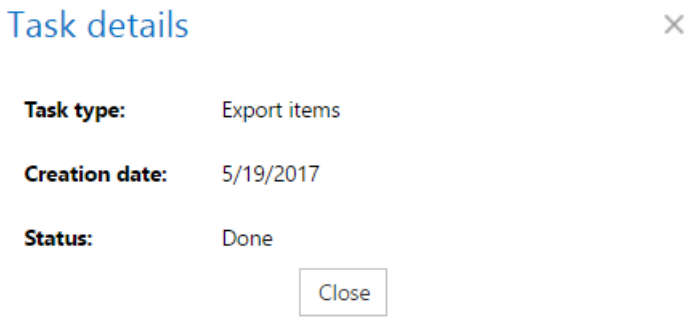
In Legal hold cases page you can do 4 actions. In the left upper corner of the list is a refresh button (1) to reload legal hold cases. By double clicking on the row in table or by clicking on the info icon (2) in action column, you are redirected to the legal hold case detail view. By clicking the recycle bin (3) you can mark legal hold case for delete.



Legal hold case details view provides more information about a selected case. This page has 3 main parts. In the first part you find details of the legal hold case. In the second part there are information about tasks that were assigned to the legal hold case.



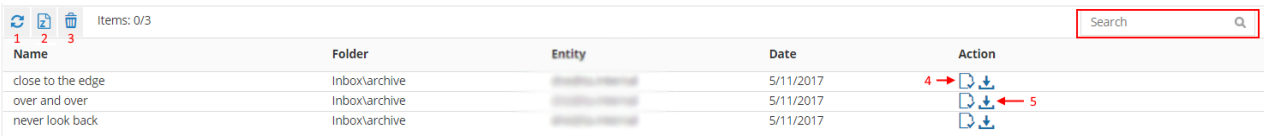
There are many different task types. After double clicking on the task you can see some additional data about the selected task. If task is in error state, then error message is shown in this pop-up view.



Export tasks are special task, which have additional action in tasks list. If task is an export task and it is finished, then in action column you can see a download icon.

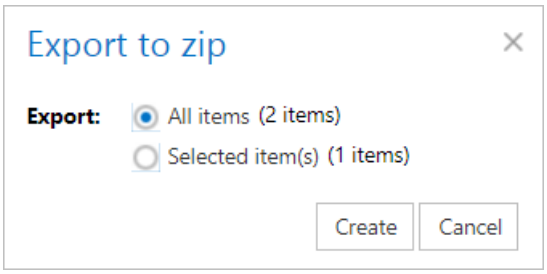
In the third part you can find documents, which belong to the current legal hold case. Here more actions are available. In the upper left corner of the documents list there is a refresh button (1) to refresh the view. Next to the refresh button is a zip icon (2), which indicates that you can create a zip export from the whole or just from selected documents. Next to the zip icon is a delete button (3) to delete selected item(s) from the legal hold case. In action column of documents list there are 2 buttons. First (4) will open a document in contentWEB and the second (5) will download it.

In the upper right corner is a search field. You can search in documents belonging to the legal hold case. Search will be performed against “Name” column. Search can be performed by hitting enter after you provide a search term. If you want to see the whole list again, then an empty search should be performed.

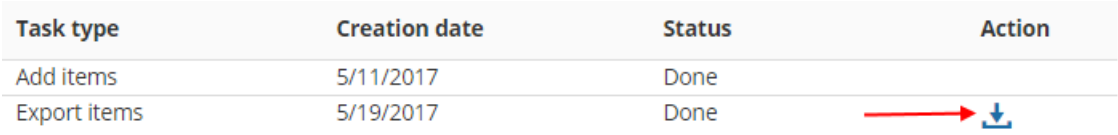


Exporting the documents

After selecting some documents (with “CTRL” + click multiselect is enabled), you can choose the export to zip button. A popup will appear with 2 possible settings.

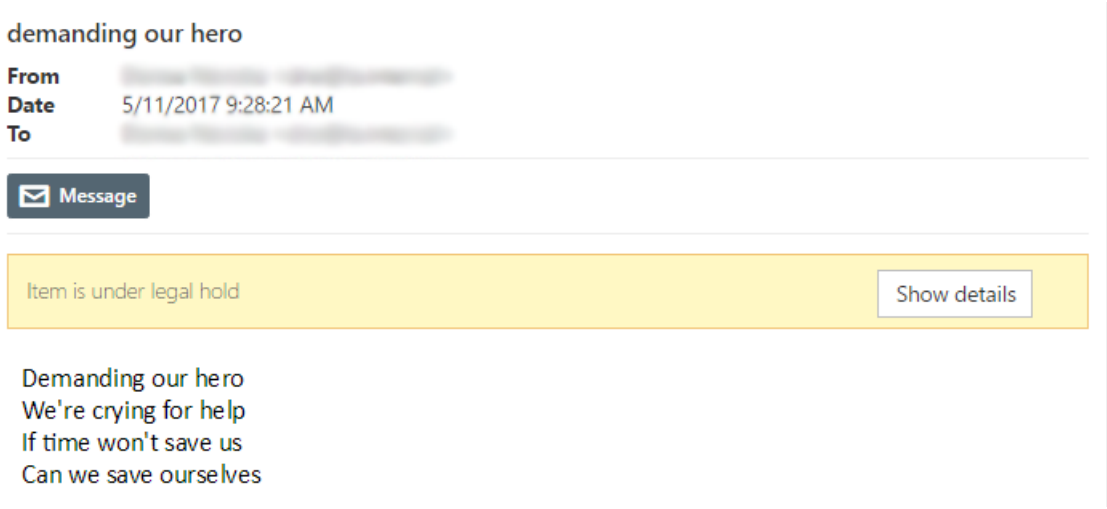


Here you can choose which items you want to export (all items in legal hold case or only some selected). By clicking on **Create,** a new export task is added to the legal hold case. It will be available as soon as the legal hold plugin processes the task. After it's finished a download link will appear in tasks list.



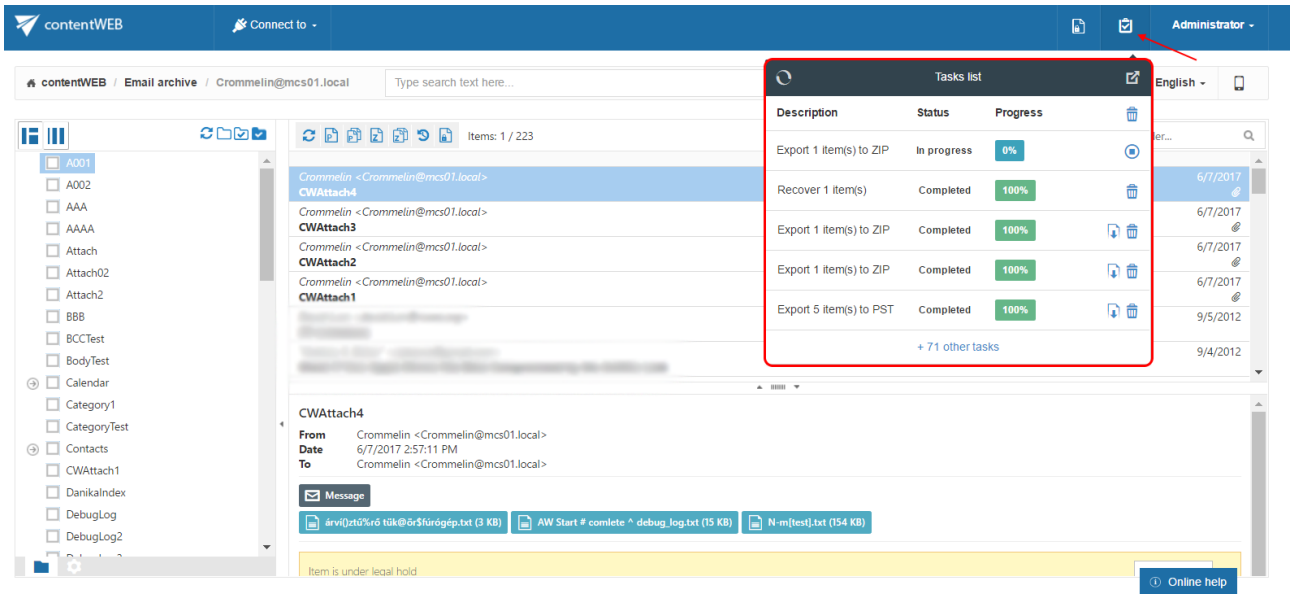
Task type	Creation date	Status	Action
Add items	5/11/2017	Done	
Export items	5/19/2017	Done	

Each document included in any legal hold is also marked and displayed for the user in search result and also in browsing mode.

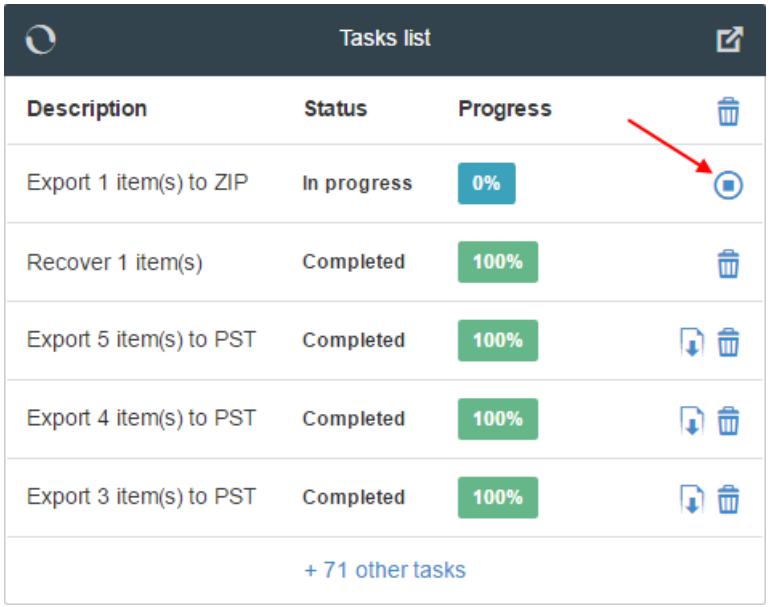


Tasks list

Export, recovery and delete tasks that have been completed/are currently running can be viewed in the **Tasks list**. Click on the task button in the head bar of contentWEB to expand the list of tasks:

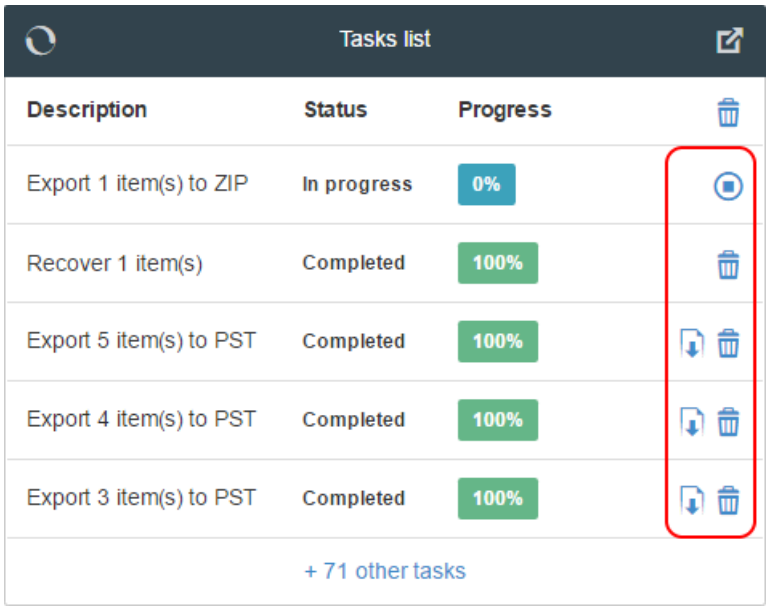


Currently running tasks can be cancelled by clicking on the **Cancel** button in the list:



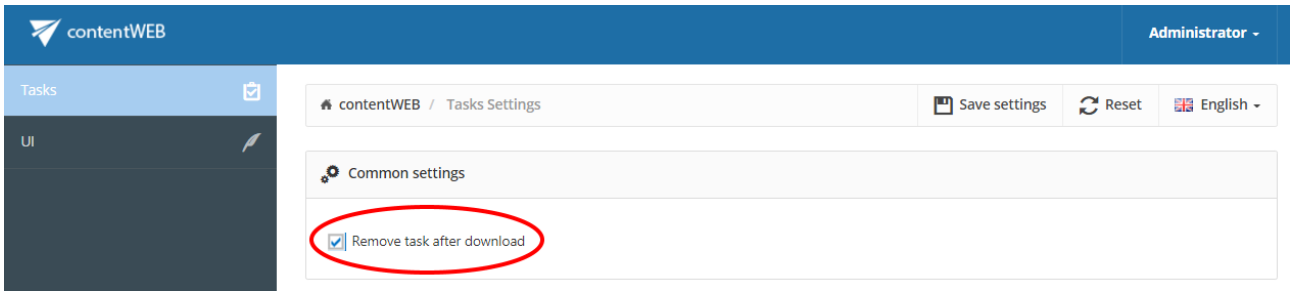
Screenshot: Cancelling an export task

The finished export tasks can be downloaded from here. The unnecessary tasks can be deleted manually from the tasks list one-by-one by clicking on the recycle bin mark in the respective row. With this action the exported items will be deleted from the server too. All completed tasks may be deleted by clicking the bin mark in the first row.



Screenshot: Download and deletion of the tasks

contentWEB allows to set the automatic deletion of already completed tasks. This configuration can be reached on the Task settings page. The page is accessible from **Settings → Tasks → Common settings**. If you want to use the automatic deletion, check the "Remove task after download" checkbox.

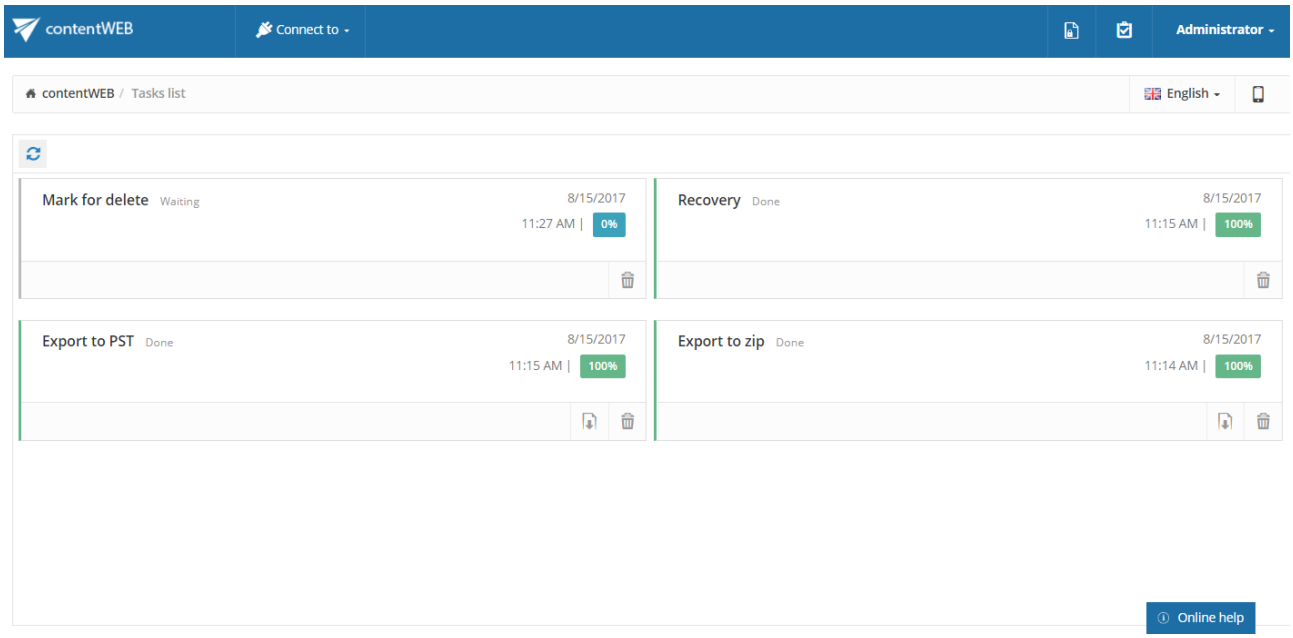


To show the complete task list on a new page, click on the page icon in the upper right corner of the Tasks list ( ) – this will navigate you to the Tasks page.

Tasks page

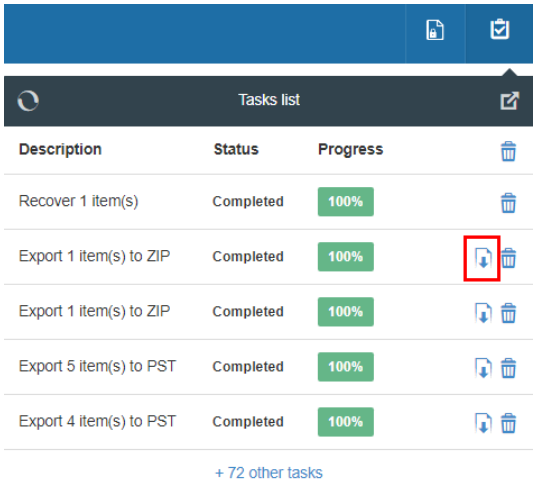
The task page is a more transparent and detailed view of the Tasks list.

Export, recovery and delete tasks are shown here. The user can download the finished export tasks, remove tasks, check progress or cancel the ongoing tasks.

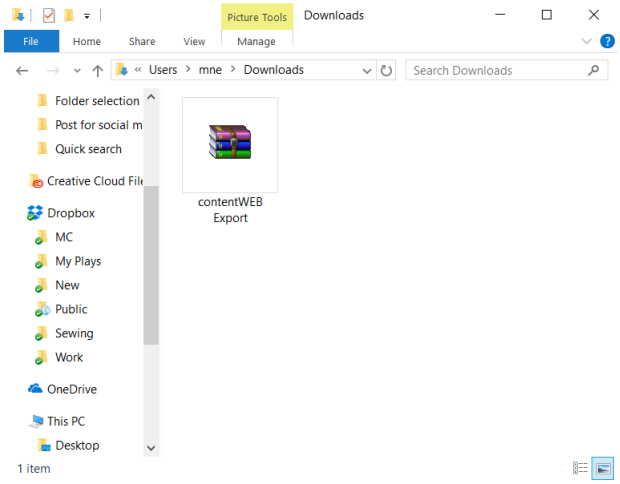


Download of export actions

Any export actions (Export to ZIP, Export to PST) can be downloaded from the Tasks list or from the Tasks page. The downloaded items are saved on the user's local disk between downloads. The ZIP package also contains a Manifest file in XLS format, which contains a summary about the exported items:



Screenshot A: Download of exported items



Screenshot B: Downloaded items

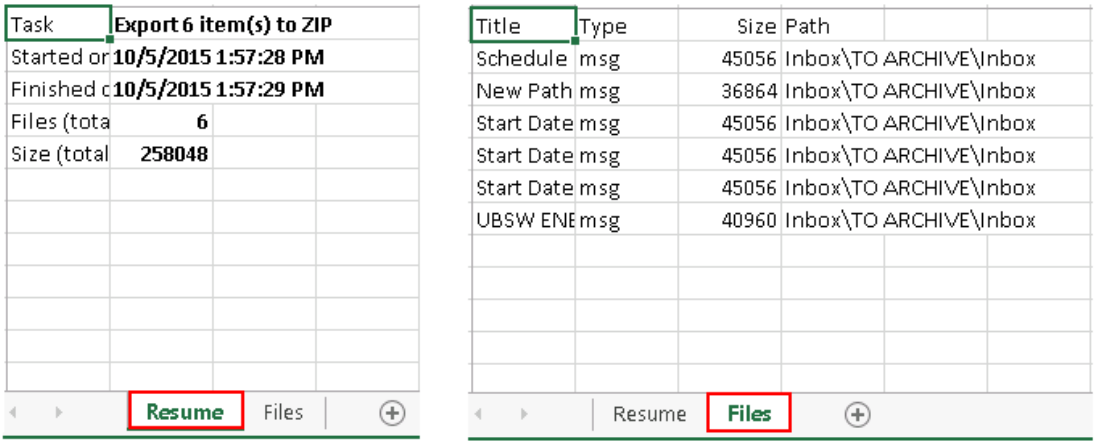
Manifest file and its settings

The manifest file is an XLS file that is automatically created when exporting any files and/or folders into ZIP format. It is a supplementary export file and can be found in the ZIP file downloaded from

the **Tasks** list. It contains a summary about the items that have been exported. By default, the manifest contains the following information:

- On the **Resume** tab the user may view the task summary information, the start date and end date of the export action, the total number and size of the exported items;
- On the **Files** tab the user may find the title of the files, the file type, size and path of each file.

Note: The File System Archive's manifest file (Title column) contains links that point to the corresponding files.



Task	Export 6 item(s) to ZIP
Started or	10/5/2015 1:57:28 PM
Finished c	10/5/2015 1:57:29 PM
Files (tota	6
Size (total	258048

Resume | Files

Title	Type	Size	Path
Schedule	msg	45056	Inbox\TO ARCHIVE\Inbox
New Path	msg	36864	Inbox\TO ARCHIVE\Inbox
Start Date	msg	45056	Inbox\TO ARCHIVE\Inbox
Start Date	msg	45056	Inbox\TO ARCHIVE\Inbox
Start Date	msg	45056	Inbox\TO ARCHIVE\Inbox
UBSW ENE	msg	40960	Inbox\TO ARCHIVE\Inbox

Resume | Files

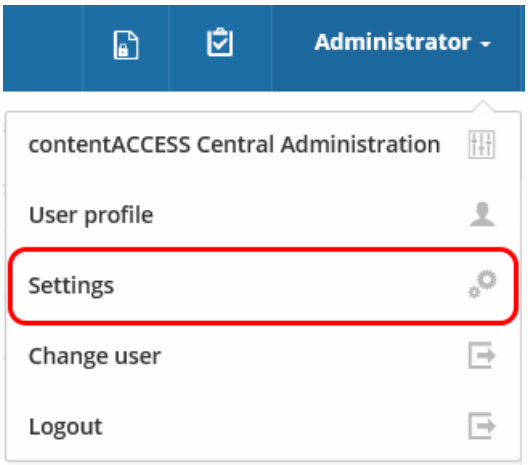
Screenshot: Manifest file's tabs

The exact fields involved in this manifest file can be configured in the administrator's settings as described below.

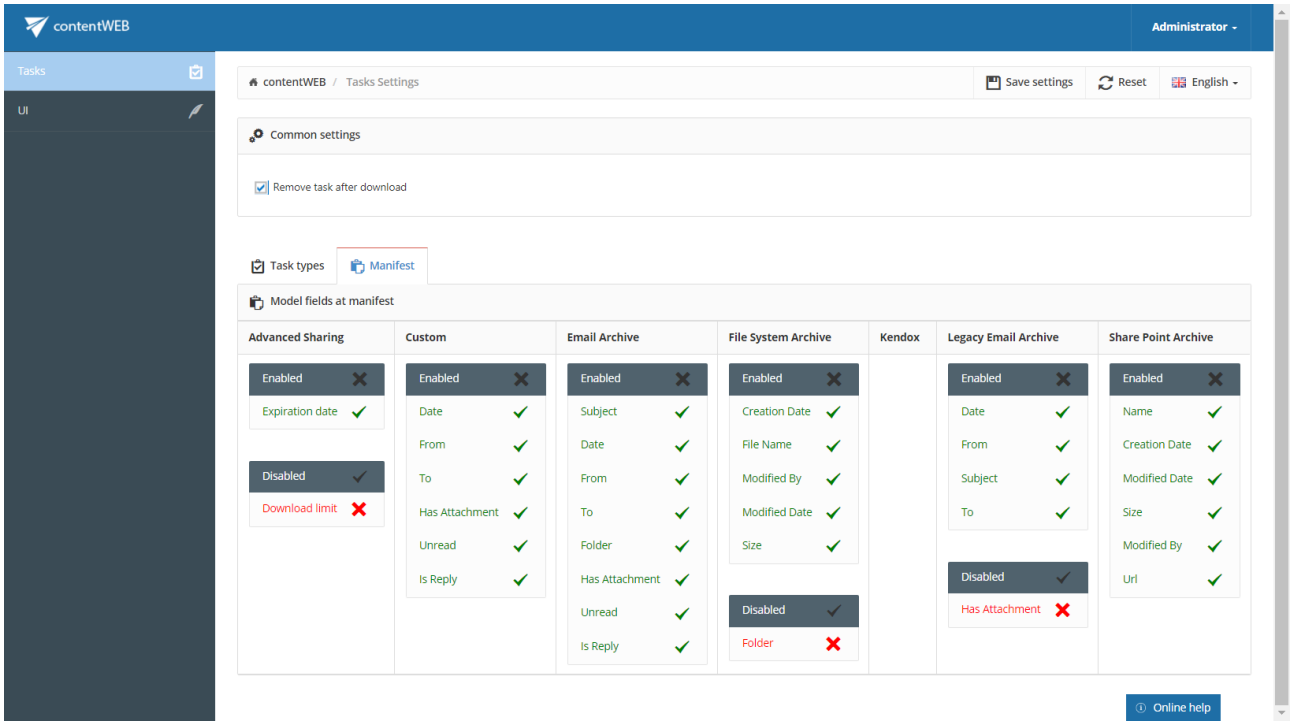
Field settings in the manifest file

To add/delete fields that should be involved in the exported manifest file, open the **Manifest settings** page from the **Administrator settings → Tasks → Manifest** tab.

Navigate to the logged on user and open the **Settings** page.



Further switch to **Tasks** in the pane and select the **Manifest** tab.



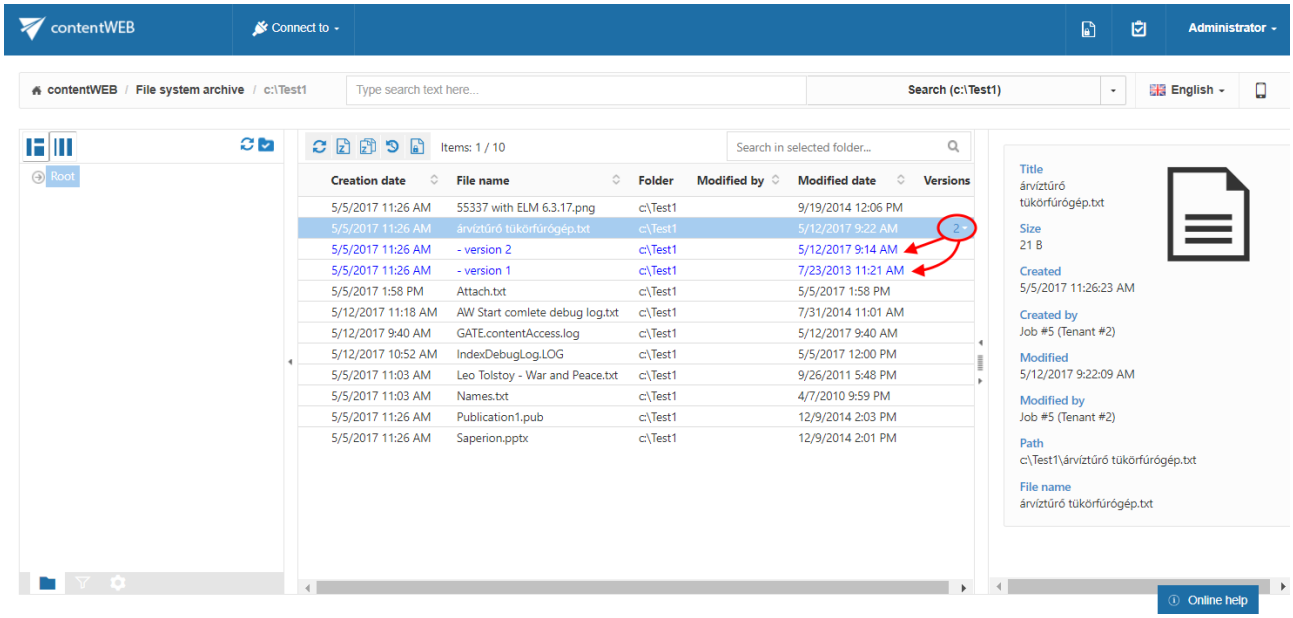
All available fields that can be displayed in the manifest file can be viewed here. Click on the cross mark (✗) next to the field to add it into the manifest. With clicking on the check mark (✓) you may disable the selected field again.

File System Archive

contentWEB is also a web user interface for the contentACCESS File System Archive. Any files archived by a File System Archive job can be accessed by an end user (with the necessary rights) from contentWEB during the files' retention time.

File versions

In contentWEB, the end user may also view the versions of a file that have been created during the archiving process. Versions are created when the original file is modified in the original file system and the archive job archives this new file version into the archive. In contentWEB, these versions are accessible in the "**Versions**" column of the item list. Click on the version count in this column and the document version(s) will be displayed. Document versions are marked with blue color.



Filtering of active/inactive file system archive documents

When is an item/folder inactive in the archive? When an archive job is running, it is synchronizing the current state of the archive with the state of the file system. It synchronizes the folder permissions as well.

An item/folder gets an **inactive status** in the archive if the **file/folder no longer exists in the file system** (**neither the original, nor the shortcut to it**).

Inactive files are marked with grey color in contentWEB, active files have a bold black color. Once the item is moved back by the user or it is restored, its status will turn to active.

The aim of active/inactive item view in the archive is:

- ✓ To make visible in the archive, whether the archive items have corresponding original or shortcut in the original file system; this might be useful when the user wants to recover from

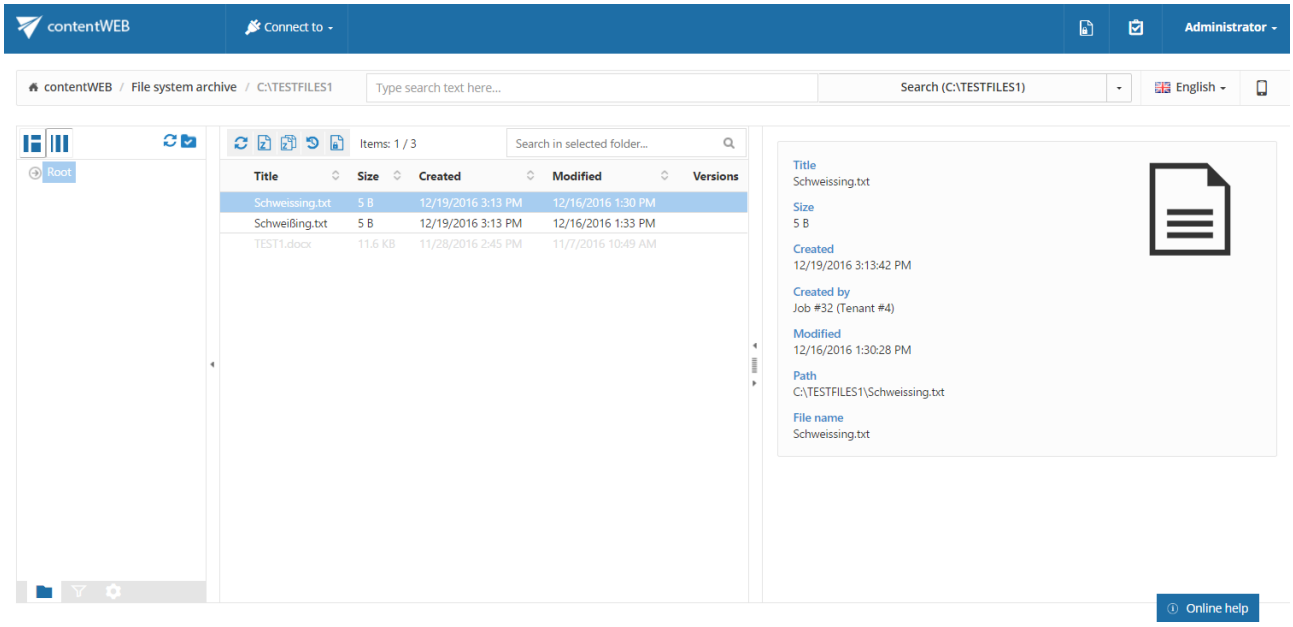
the archive. (For more information about the recovery function refer to section "Recovery" below.)

✓ To avoid displaying duplicates by using the active/inactive filtering options in the archive.

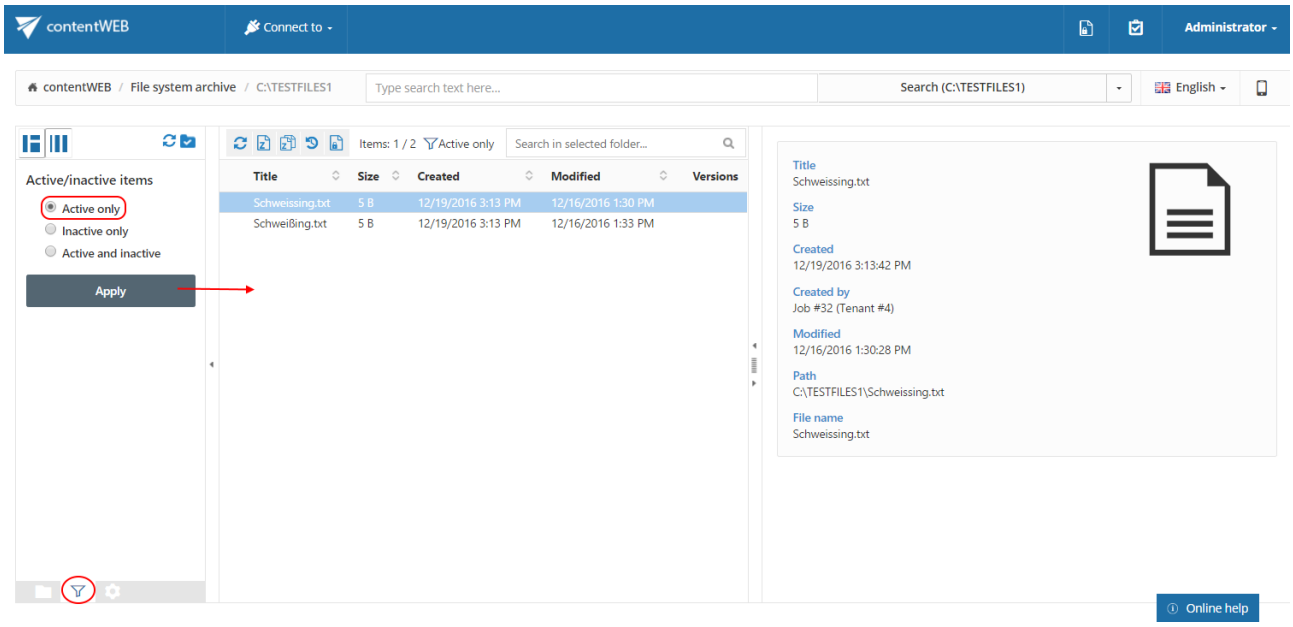
Note: Duplicates are created if a file/folder was moved to another file system location, or if it has been renamed and an archive job processed both the old and the new file/folder.

How to filter between active/inactive items in the archive?

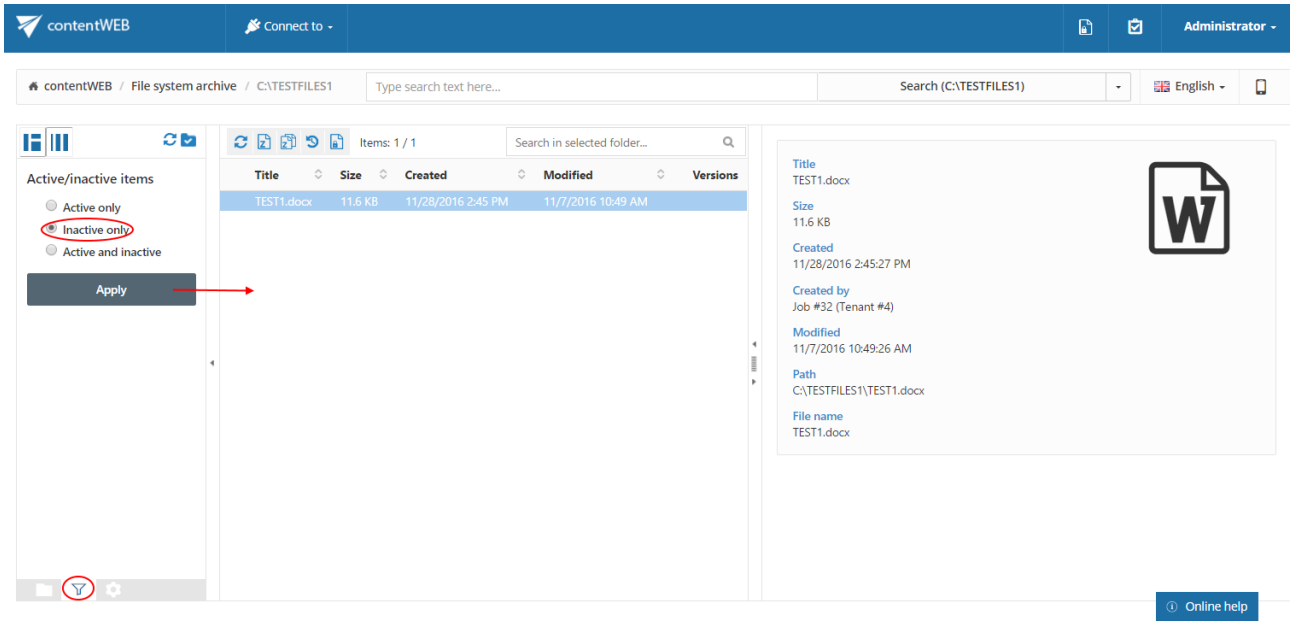
Our archive folder "**TESTFILES1**" on the below displayed screenshot contains both active and inactive items.



To filter out active/inactive items in a folder, click on the horn sign ( ) at the bottom of the navigation pane. To filter the active documents only, "**Active only**" filter must be applied. Screenshot A shows the active items of the archive folder, on screenshot B only the inactive items are filtered out:



Screenshot A: Active items of the folder



Screenshot B: Inactive items of the folder

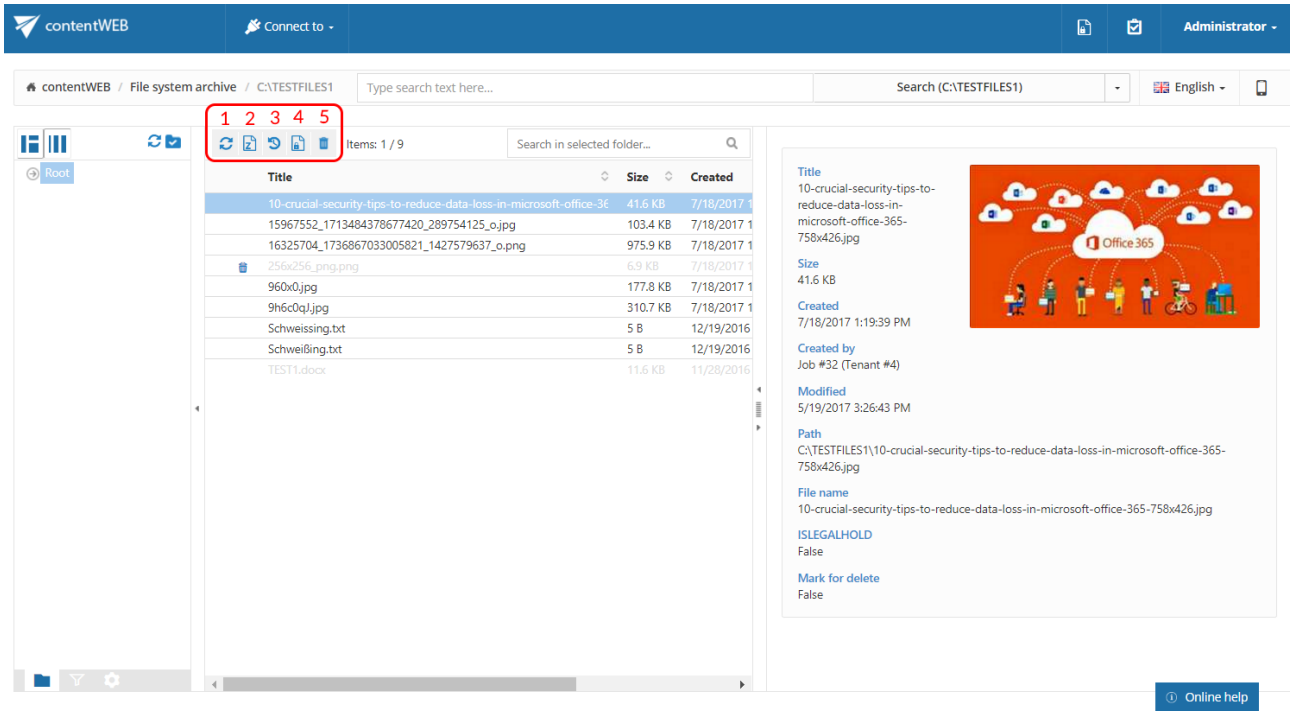
File Archive tasks

By default, the following tasks can be triggered on the selected File Archive items/folders using the toolbar buttons:

1. **Refresh**
2. **Export to ZIP**
3. **Recover item(s)**

4. **Legal hold**
5. **Mark for delete**

The file archive tasks can be disabled/enabled in the Administrator's settings on the **Task types** tab. For more information read section [Enabling/disabling tasks](#).



Screenshot: Toolbar buttons in File Archive

It is possible to select

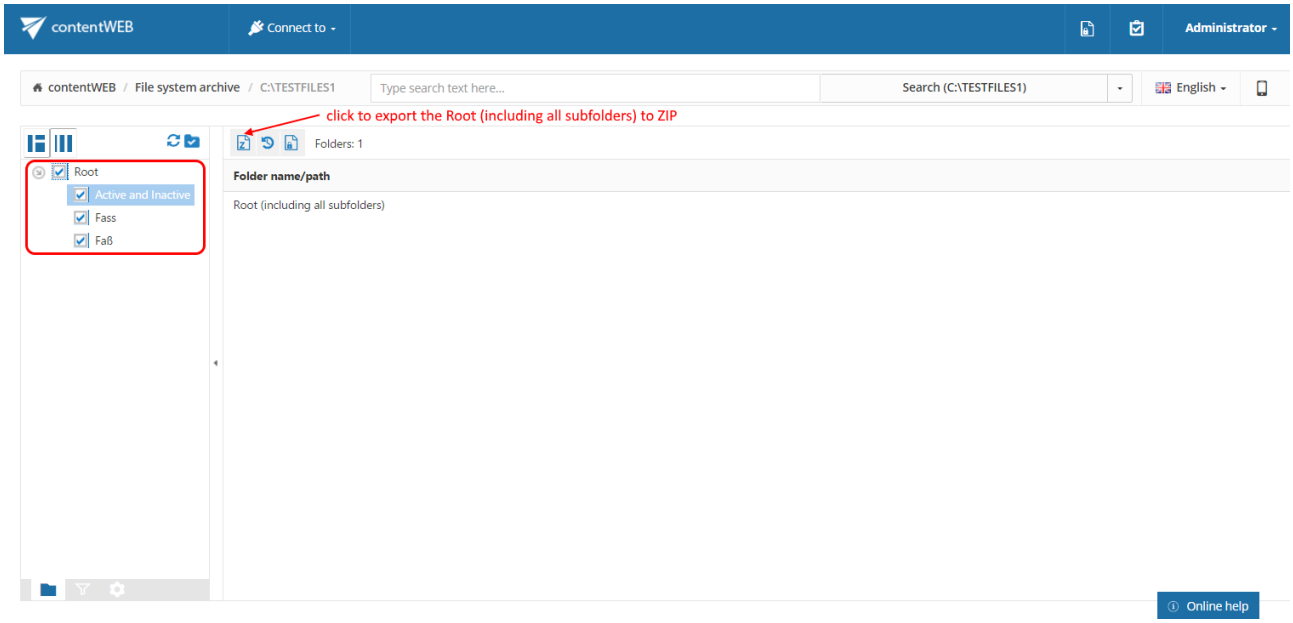
- the **whole folder structure** on the root,
- a **recursive folder** structure
- **child folders**
- and **items** to process

For more information refer to section [Folder selection methods](#).

Refresh
This toolbar button should be used if any items have not be displayed in the item list yet and the list of items should be reloaded.

Export to ZIP
To export file archive item(s)/folder(s) into ZIP format, select the desired item(s) from the list view (or select the node(s) in the left side pane) and click on the **Export to ZIP** button located above the

list view. The exported items are zipped in the background (on the server side). On the screenshot below we have selected the **Root** folder (including all its subfolders) to be exported into ZIP:



The exported items/folders can be downloaded from the Tasks list. (For more information refer to section [Download of export actions](#))

Recovery

Recovery is used to re-generate a file system from the archive back into the original file location.

This processing type can be used in the following cases:

- A folder structure has been deleted;
- One or more folders have been deleted;
- One or more documents from the folder(s) have been deleted

from the original file location and the user needs to get back these already archived documents from the archive. The items that do not have an original or a shortcut in the original file location (in the file system) are inactive in contentWEB and have a light grey color.

With the recovery function the archived items can be put back into their source location. It can also create the folder if it was deleted from the folder structure. It is possible to recover any part of the structure:

- One or multiple folders;
- Recursive folder structure;
- One or more folder contents.

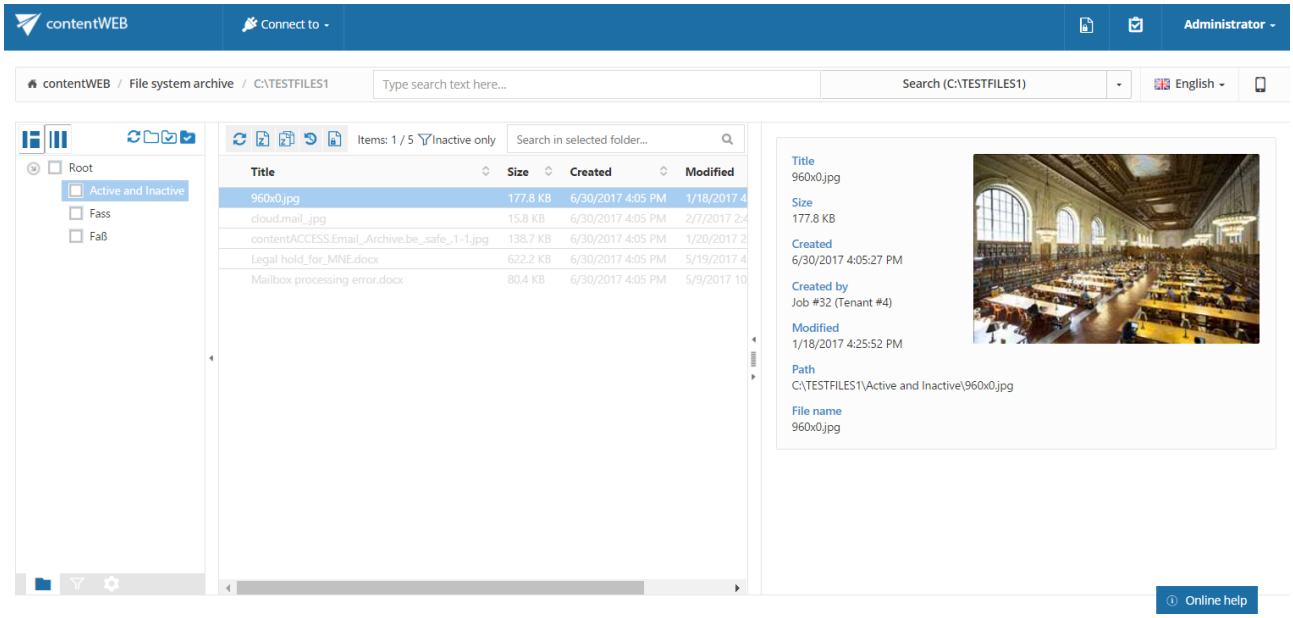
Important! The root folder mustn't be deleted (or it must be re-created if it was deleted) from the original file system, otherwise its contents can't be recovered back into the original location.

The file system recovery job is checking for duplicates, so the same recovery job can be run safely multiple times, duplicates will not be created:

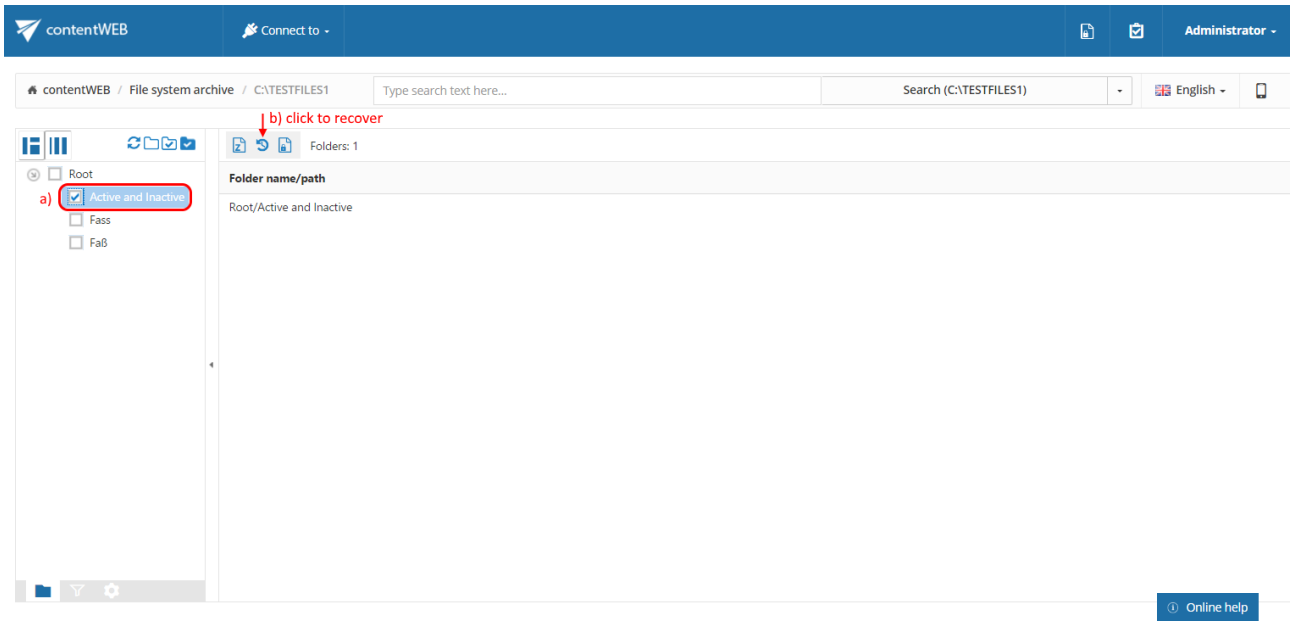
- If there is a shortcut for the recovered file in the folder – the file won't be recovered;
- If the file is already present in the folder – the file won't be recovered.

Recovery of deleted items of folder "Active and Inactive"

In this use case we will recover the deleted items of our shared folder "**Active and Inactive**". First we select this folder in the navigation pane. Our inactive items have a light grey color in the grid.



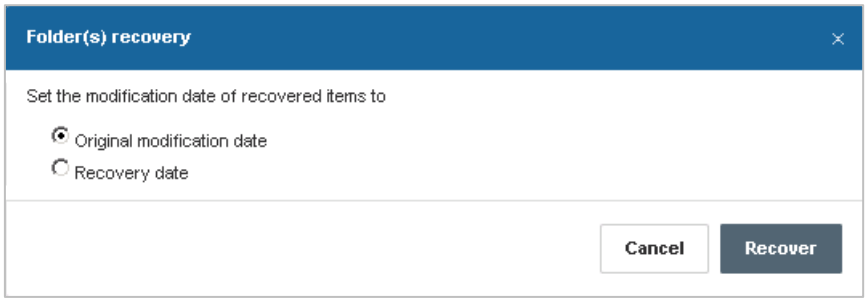
Now we want to have all deleted folder items (inactive documents) back in our file location. We check folder's check box in the navigation pane (step "a") and we click on the recovery toolbar button above the list view (step "b"):



With the manual recovery the user has multiple options:

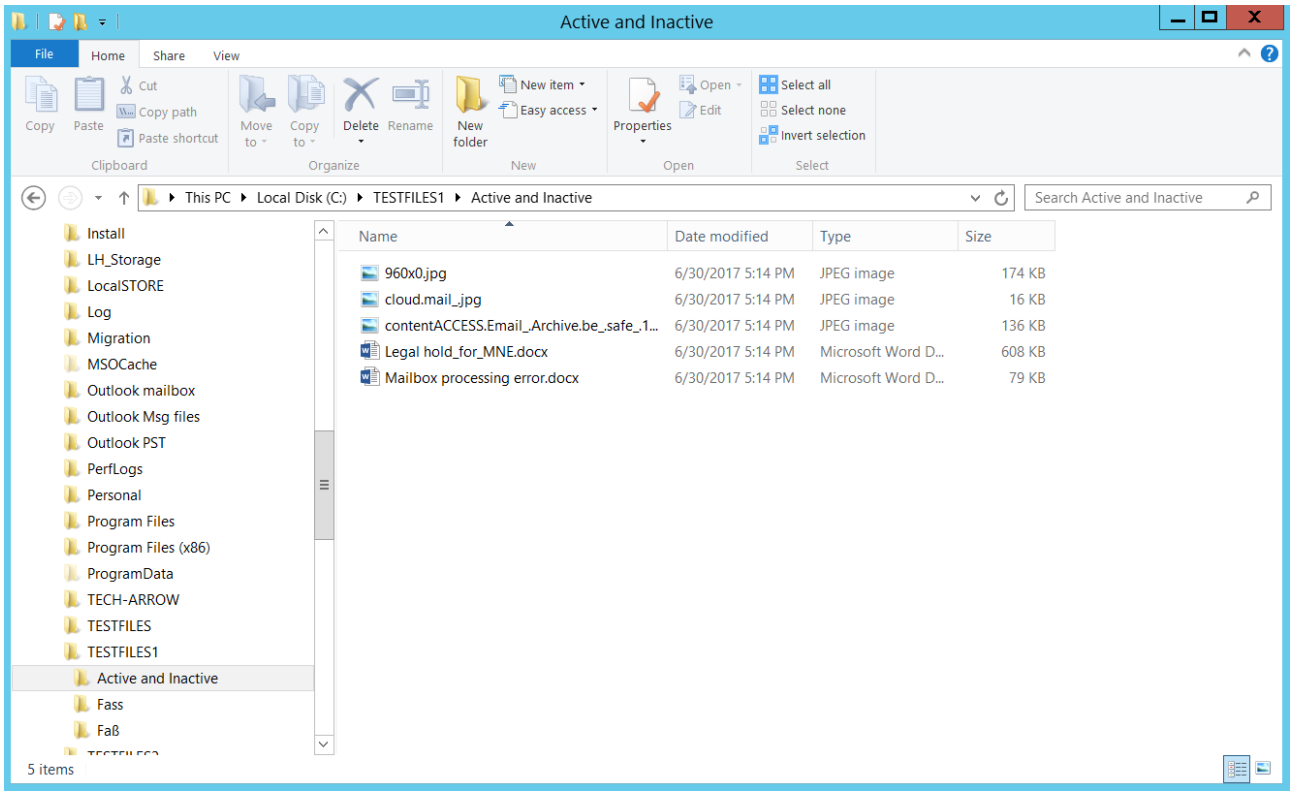
- He can either recover with the original modification date;
- He can also recover with the recovery date.

It is worth to recover with the recovery date if an archive job is already running on the selected file system folders and the files with a modification date younger than the recovery date are set to be archived. By selecting the recovery date the user can prevent the recovered file(s) from being re-archived.

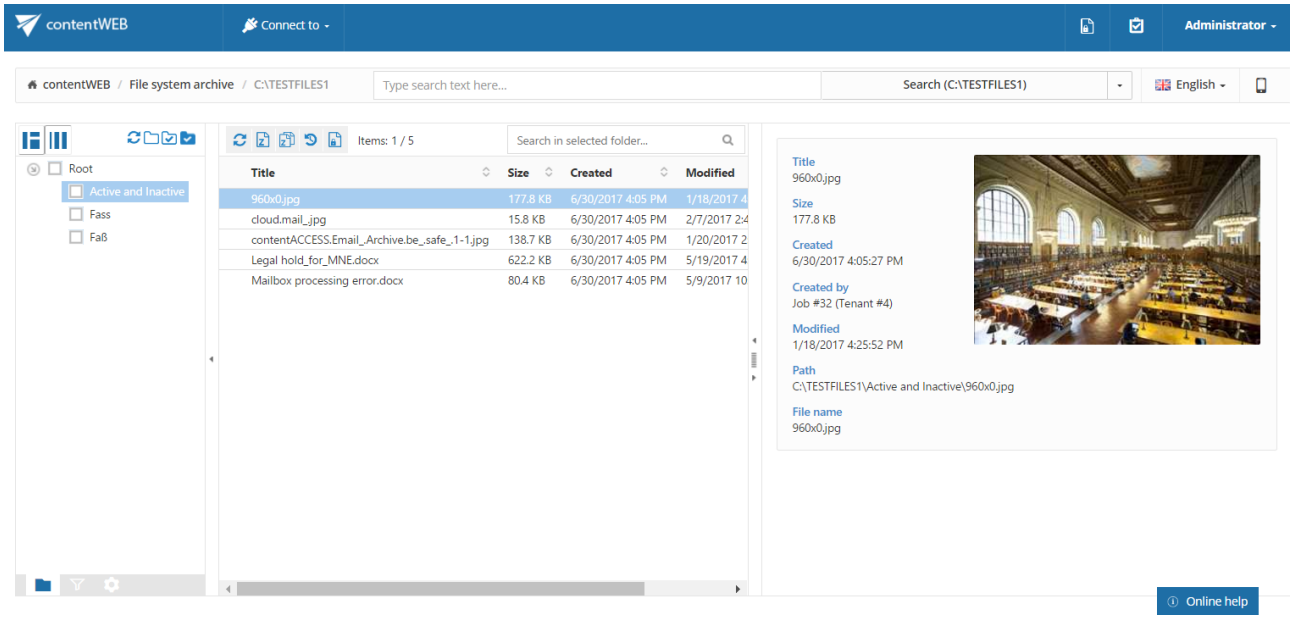


Click on "**Recover**" button to start the process. The active items will be skipped in the file system; if an original file exists, it will not touched, if a shortcut to the item exists, it will be skipped.

All the items were recovered into the given folder. The modification date is set to the original modification date:

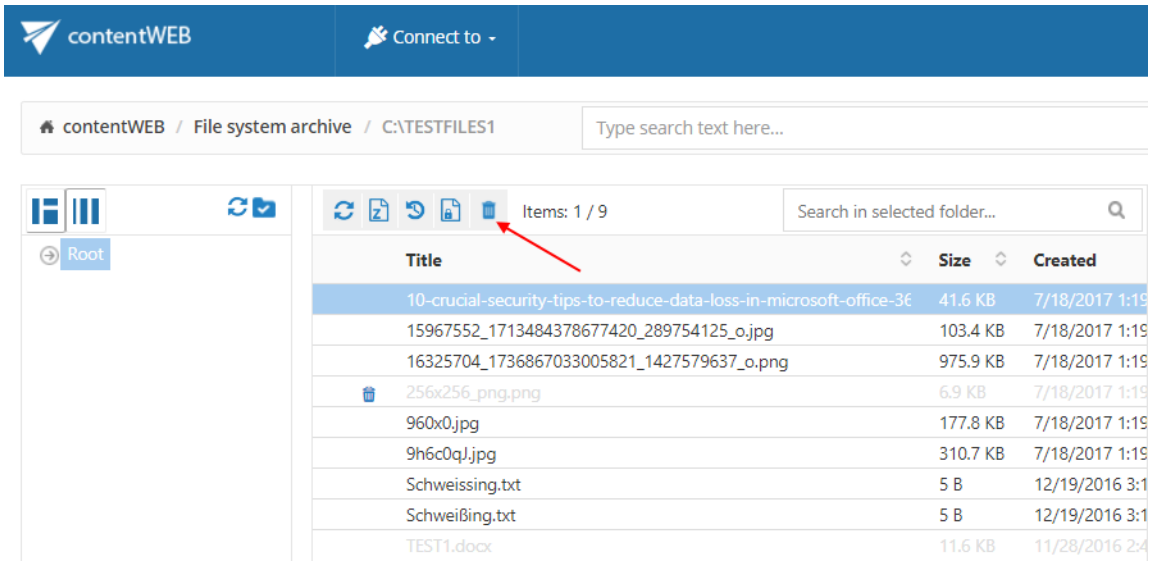


Once the files are recovered, they will be recolored to black in the contentWEB's item's grid:

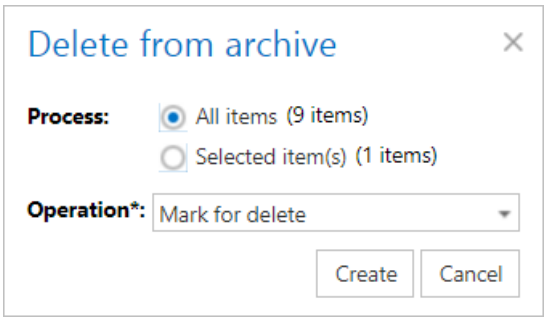


Mark for delete

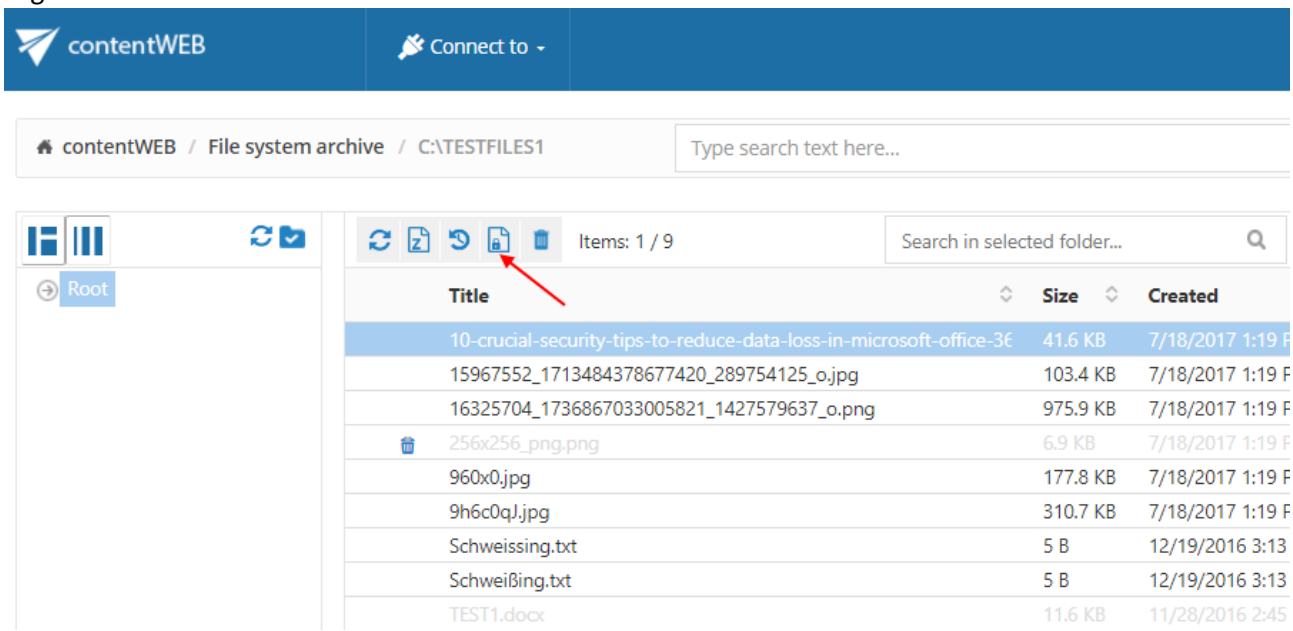
With this task you can mark/unmark documents to be later deleted from the archive by the Delete job. You can either way mark/unmark only the selected files, or all files from the current folder.



Select the desired action (mark or unmark) from the **Operation** dropdown list and then click **Create**.



Legal hold



Read more about this feature here.

Email Archive

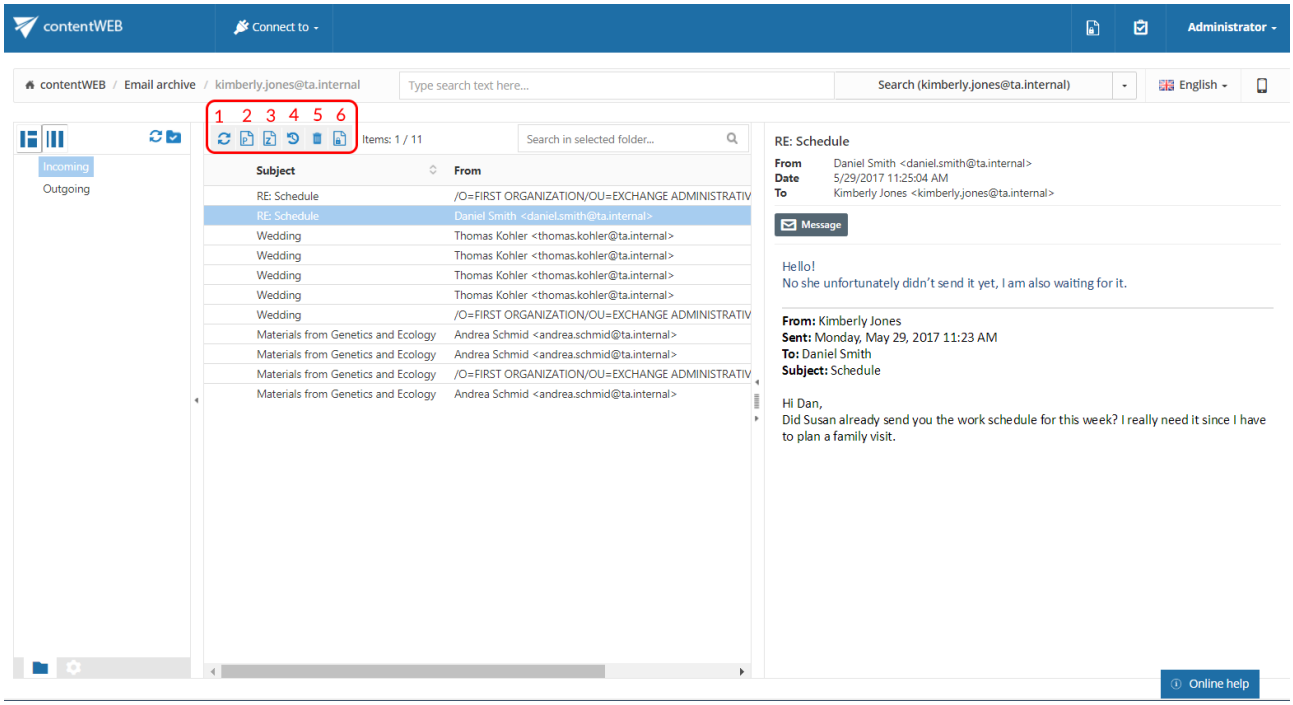
contentWEB is also a web user interface for the contentACCESS Email Archive. Emails and attachments archived by an Email Archive job can be accessed by an end user from contentWEB during the emails' retention time.

Email Archive tasks

By default, the following actions can be run on the selected email archive items/folders using the toolbar buttons.

1. **Refresh**
2. **Export to PST**
3. **Export to ZIP**
4. **Recover item(s)**
5. **Mark for delete**
6. **Legal hold**

The email archive tasks can be disabled/enabled in the Administrator's settings on the **Task types** tab. For more information read section Enabling/disabling tasks.



Screenshot: Toolbar buttons in the Email Archive

It is possible to select

- the **whole folder structure** on the root,
- a **recursive folder** structure
- **child folders**
- and **items** to process

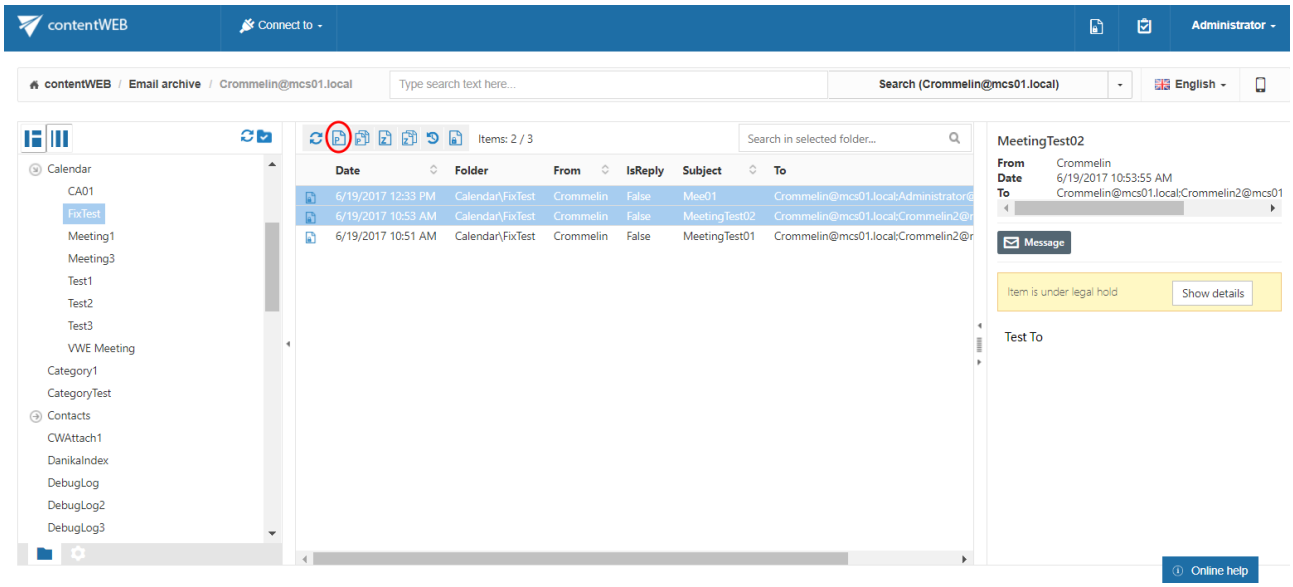
For more information refer to section Folder selection methods.

Refresh

This option should be used if any items have not been displayed in the item list yet and the list of items should be reloaded.

Export to PST / Export all to PST

To export one or multiple mailbox items/mailbox folders into PST format, select the items from the item list/mailbox folders from the navigation pane. Now click on the **Export to PST /Export all to PST** button located above the list view. **Export to PST** will export only the selected items, **Export all to PST** will select all items of the current folder into PST. On the screenshot below we have selected 2 items in the item list to be exported:

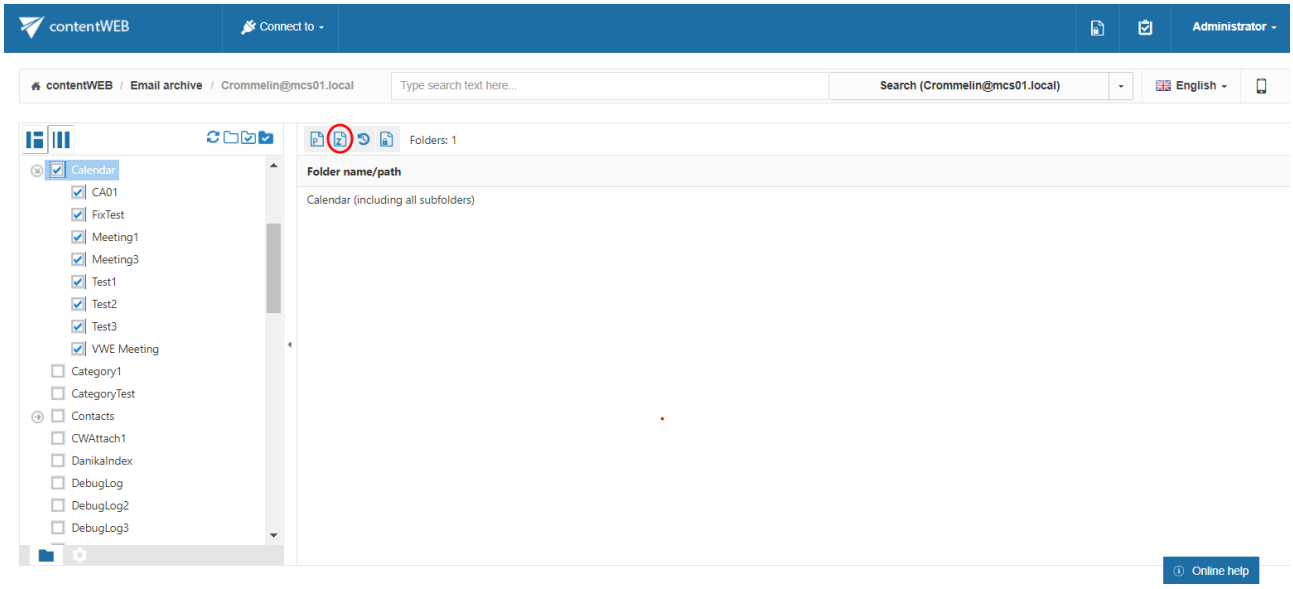


The exported items/folders can be downloaded from the Tasks list. (For more information refer to section Download of export actions)

Export to ZIP / Export all to ZIP

To export one or multiple mailbox archive item(s)/folder(s) into ZIP format, select the mailbox item(s) from the item list (or select the node in the tree view) and click on the **Export to ZIP / Export all to ZIP** button located above the item list. **Export to ZIP** will export only the items selected in the items list, while **Export all to ZIP** will export all items of the selected folder(s). The exported items are zipped

in the background (on the server side). On the screenshot below we have selected parent folder "Calendar" and its subfolders from the navigation pane. These will be exported into ZIP:



Screenshot: "Calendar" parent and its subfolders selected for processing

Recovery
Recovery is used to re-generate the emails from the archive back into the original location.

This processing type can be used in the following cases:

- A folder structure has been deleted;
- One or more folders have been deleted;
- One or more emails from the folder(s) have been deleted

and the user needs to get back these already archived items from the archive.

With the recovery function the archived items can be put back into their original mailbox location. It can also create the folder if it was deleted from the mailbox's folder structure. It is possible to recover any part of the structure:

- One or multiple mailbox folders;
- Recursive folder structure;
- One or more folder contents.

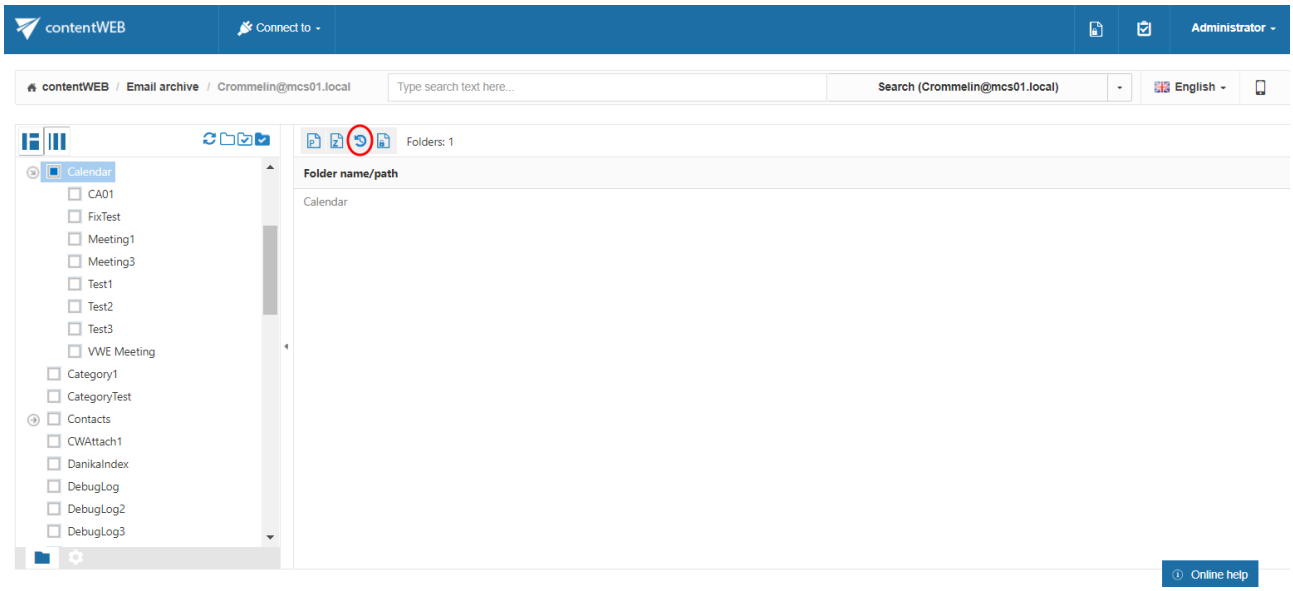
Important! The root folder mustn't be deleted (or it must be re-created manually if it was deleted) from the folder structure, otherwise its content can't be recovered back into the original location in the mailbox.

- If there is a shortcut for the recovered email in the mailbox folder – the email won't be recovered;

- If the email is already present in the mailbox folder – the email won't be recovered;
- If the email has been deleted from the mailbox folder – the email will be recovered.

Recovery of deleted mailbox folder "Calendar"

In this use case we will recover the deleted mailbox folder "**Calendar**". We would not like to involve the subfolders, so we double click on this folder's checkbox in the navigation pane. Then we click on the recovery toolbar button above the list view:

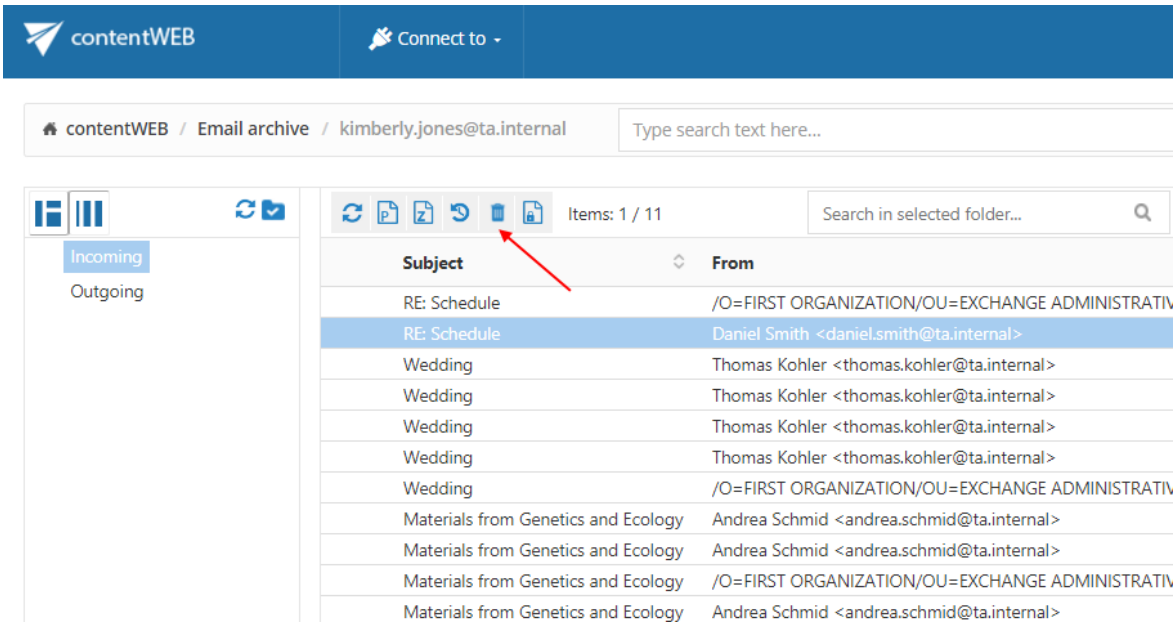


Folder "Calendar" will be put back into the mailbox after the task is completed.

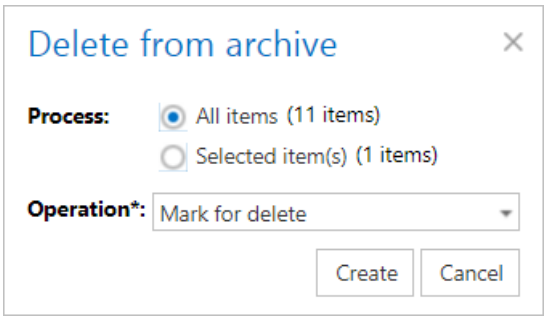
Export and recovery actions (accessible from the toolbar buttons of Email Archive and File System Archive) that run/are currently running can be viewed and downloaded from the **Tasks list**. For more information about the Tasks List refer to section Tasks list.

Mark for delete

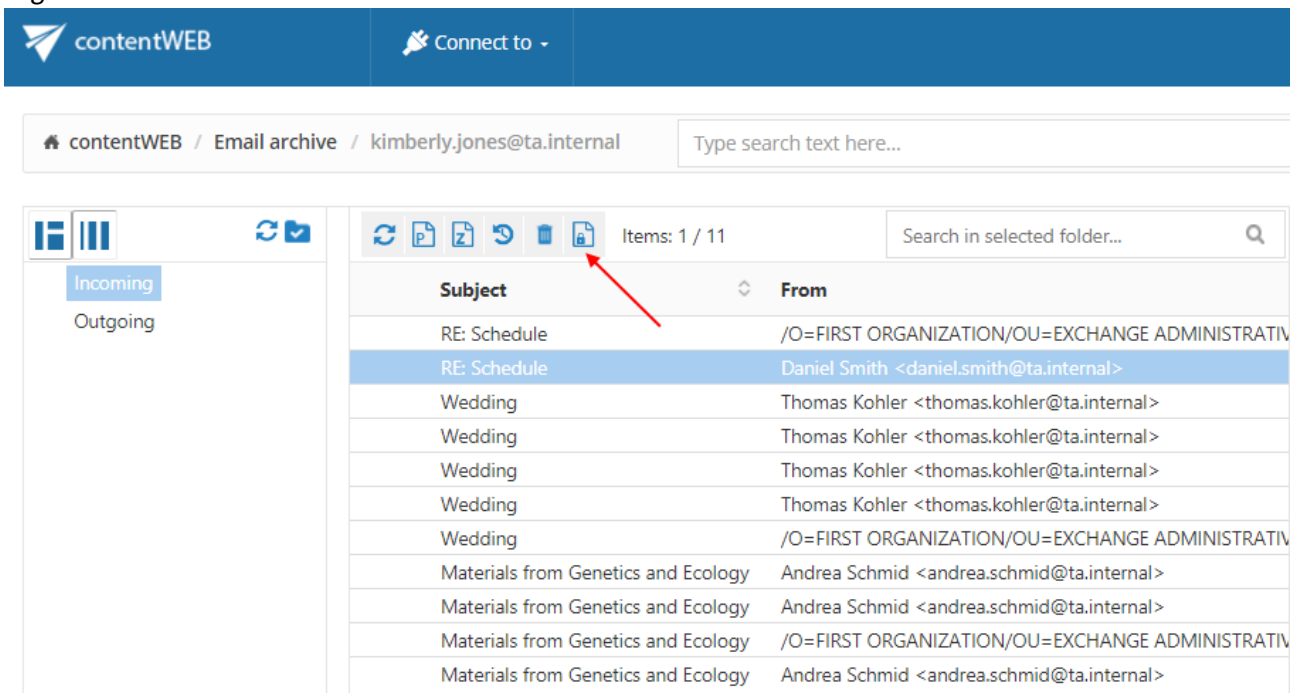
With this task you can mark/unmark emails to be later deleted from the archive by the Delete job. You can either way mark/unmark only the selected emails, or all emails from the current folder.



Select the desired action (mark or unmark) from the **Operation** dropdown list and then click **Create**.



Legal hold



Read more about this feature here.