

# contentACCESS Portal

## Manual – version 6.3



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## What is contentACCESS Portal?

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

[http://\[contentACCESS Portal\\_Server\\_Name\]/contentACCESS Portal/](http://[contentACCESS Portal_Server_Name]/contentACCESS Portal/)

The only condition to access the archive with contentACCESS Portal is to have contentACCESS Portal 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.

contentACCESS Portal 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 contentACCESS Portal make the work with these documents more comfortable and intuitive.

## Main contentACCESS Portal 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 contentACCESS Portal 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

- o Operating System (64bit): Windows 2012 R2 and higher;
- o Internet Information Services 7.0 and higher;
- o .NET Framework 4.8

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

- o MS Outlook 2010 x64, MS Outlook 2013 x64, MS Outlook 2016 x64 or MS Outlook 2019 x64

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



## Other requirements

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

## Supported browsers

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

## Installation

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



### Steps

EULA

Installation type

**Components**

### Components

Select the components which you would like to install.

#### Components

Core server

License key

-  -  -  -

[Proxy settings](#)

Central Administration

Portal 

Central login

Web Services (Proxy)

Virtual drive

Search service (V2)

SMTP server

Preview service



Previous

**Next**

Cancel

## Logging into contentACCESS Portal

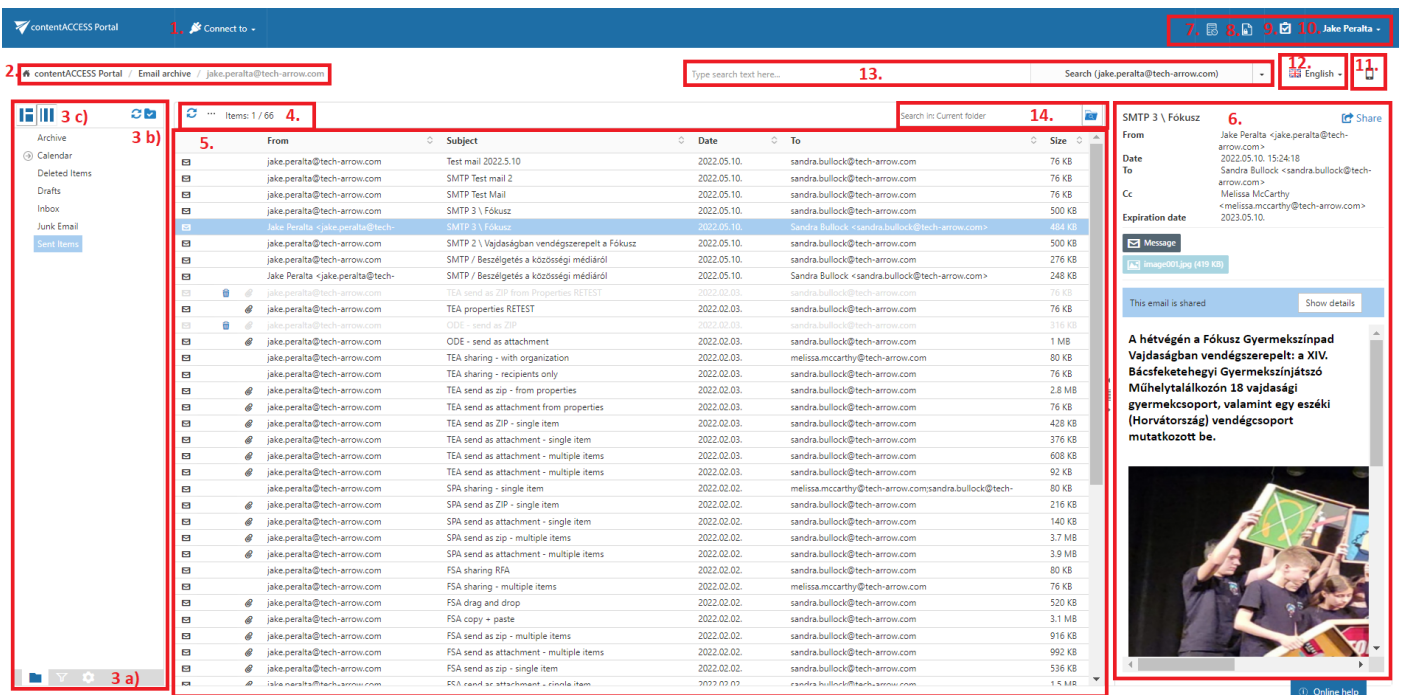
How to log in to contentACCESS Portal over the web browser? The user can log into the user interface using one of the supported web browsers. After browsing the contentACCESS Portal URL ([http://\[contentACCESS Portal\\_Server\\_Name /contentACCESS Portal/Login.aspx\]](http://[contentACCESS Portal_Server_Name /contentACCESS Portal/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 contentACCESS Portal archive interface opens.



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

## contentACCESS Portal user interface

The contentACCESS Portal 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. **contentACCESS Portal 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
  - 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;
- b) **Folder selector buttons:** Here you can enable folder selection and then select/deselect the entire



folder structure in the pane;

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, Create report, Share item(s), 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;**

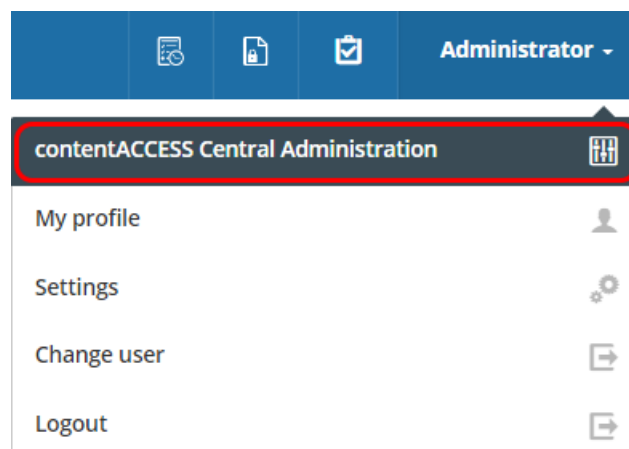
7. **Periodical search list** – here the user can find list of all available [Periodical search](#)

8. **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;

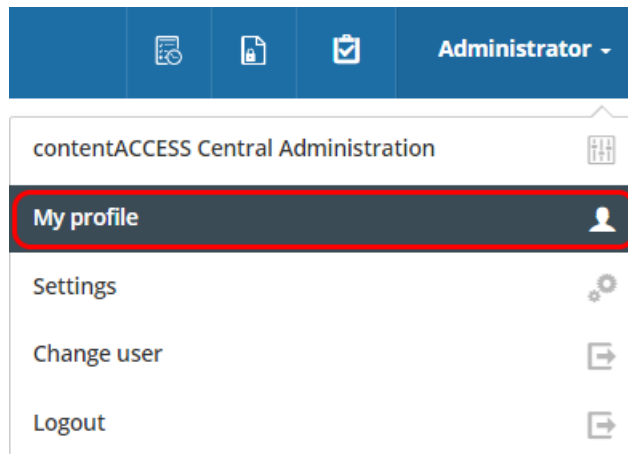
9. **Tasks list;**

10. **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 contentACCESS Portal

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](#).



11. **Switch to mobile version;**
12. **Language selection** menu: the user may select a language here;
13. **Fulltext search** and **Advanced search** menu;
14. **Simple search** textbox with selector for level of searching – Current folder, Current folder and subfolders, Subfolders only;

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

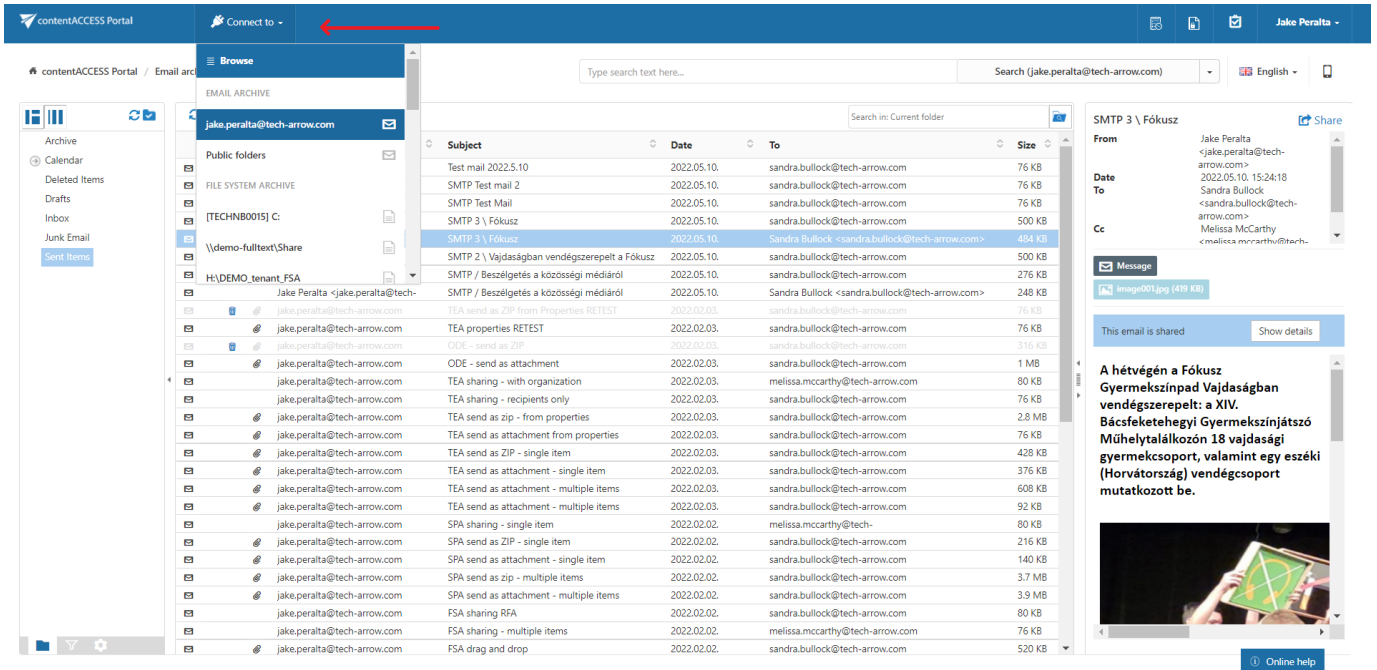
#### Definition of terms:

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

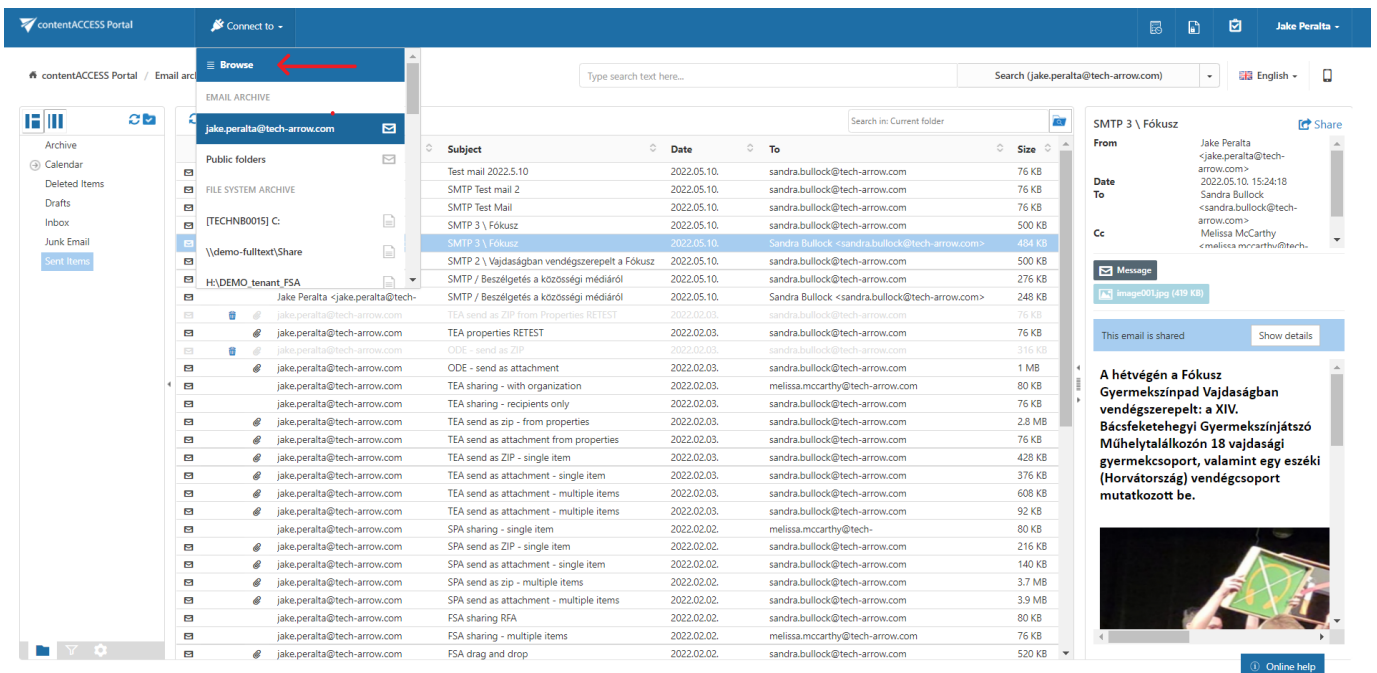
**Entity = a mailbox (in case of Email archive), a root (in case of File system archive) ...; to connect to an entity select it in the “Connect to” menu**

### “Connect to” menu

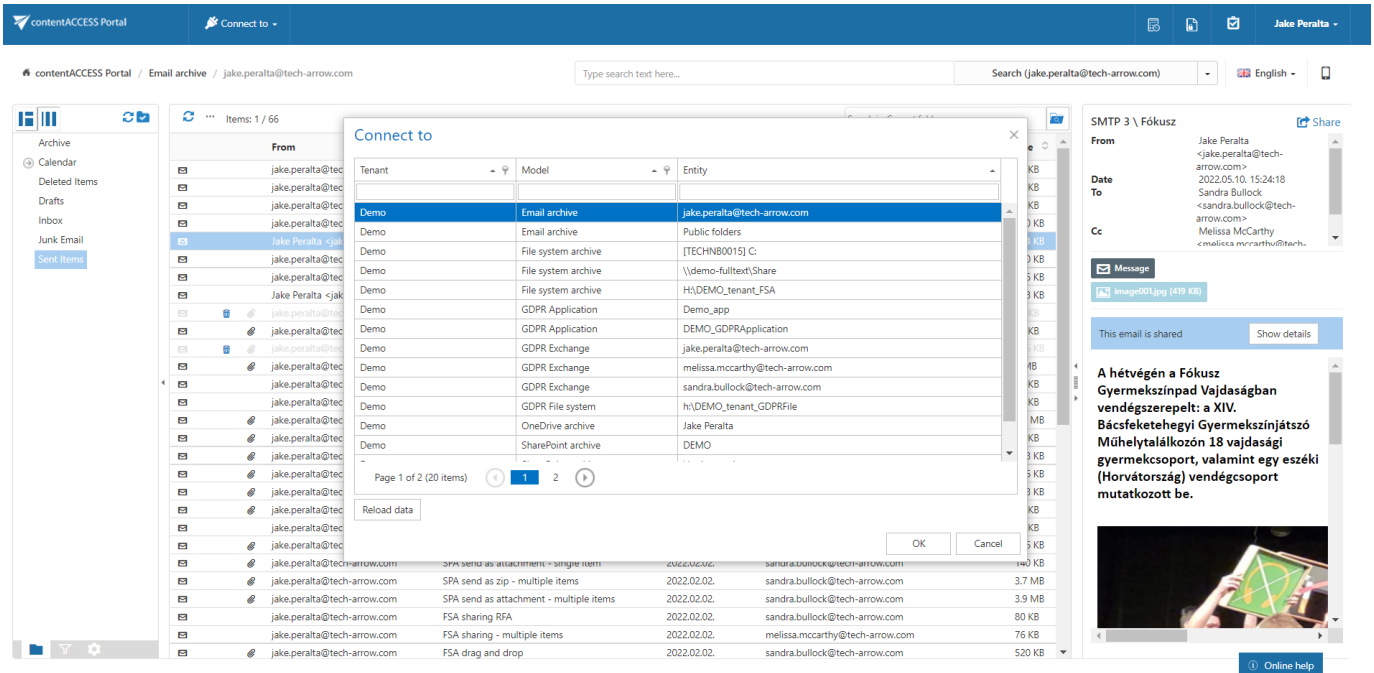
In the left upper part of the header bar click on the “Connect to” menu to unfold the associated entities that you can connect to (to which an access permission is granted). Under **EMAIL ARCHIVE** the associated archived mailboxes can be seen; under **FILE SYSTEM ARCHIVE** the associated archived folders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



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

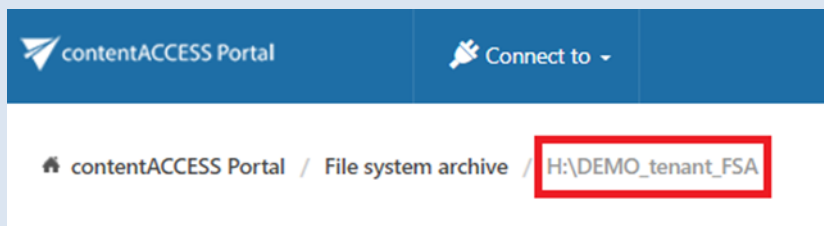


Here the user can browse the available entities. The grid allows to filter them by tenant and model type and it is also possible to search in them.

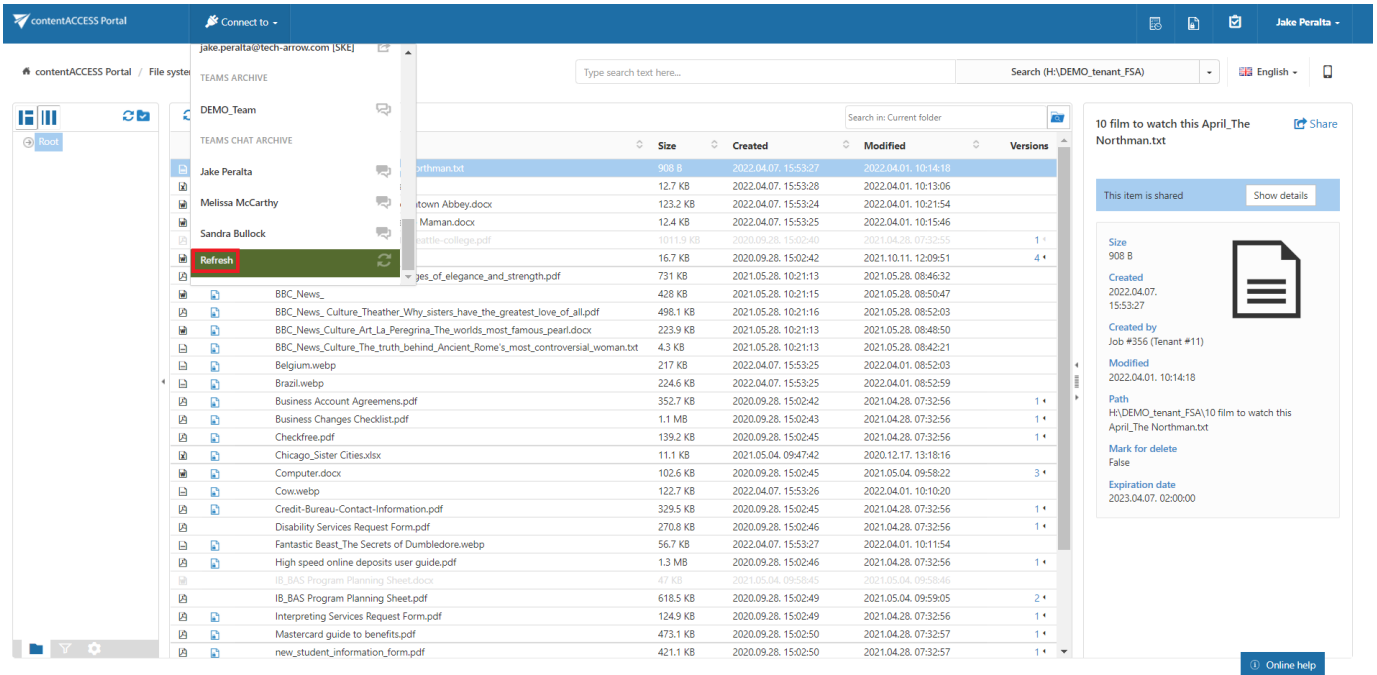


The user can select one entity and click OK or double click on an entity to connect to it.

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

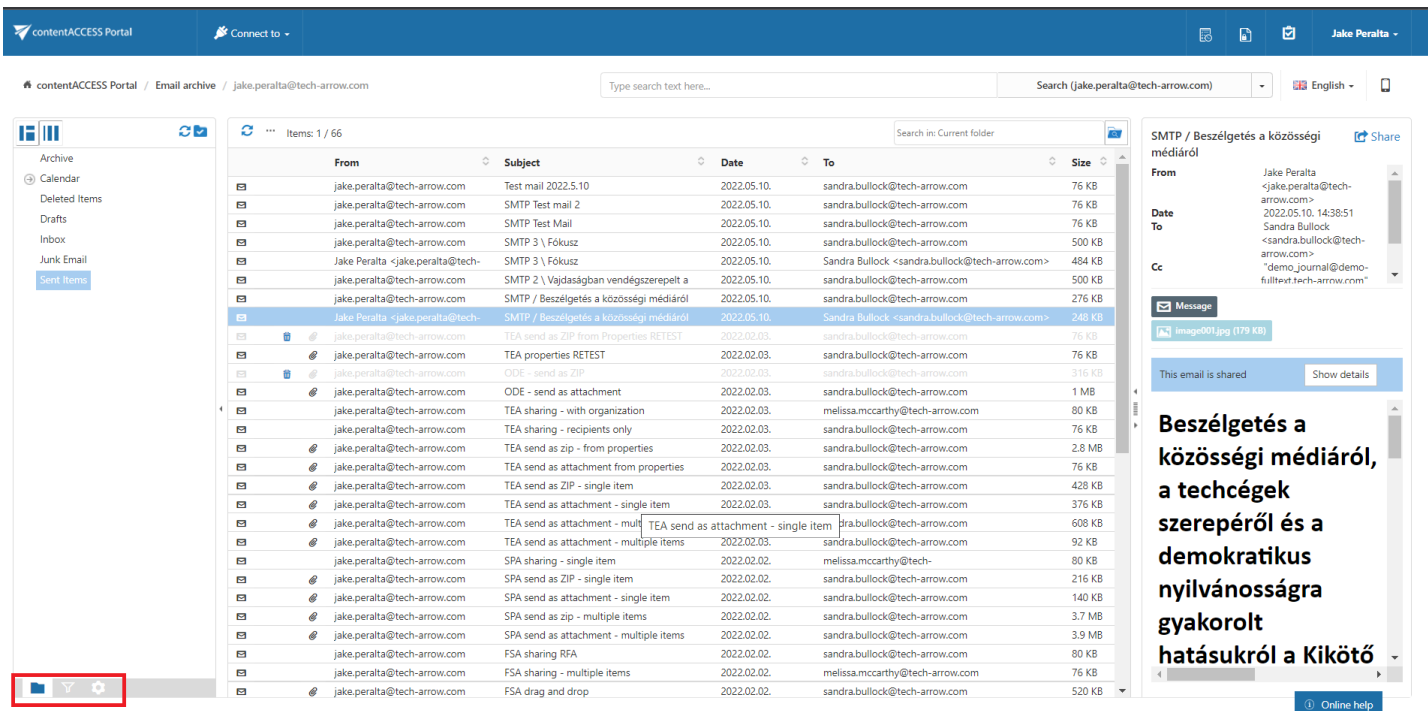


At the bottom of the connection list is a **Refresh** button. This may be used if any newly processed items have not been displayed yet and the list should be refreshed.



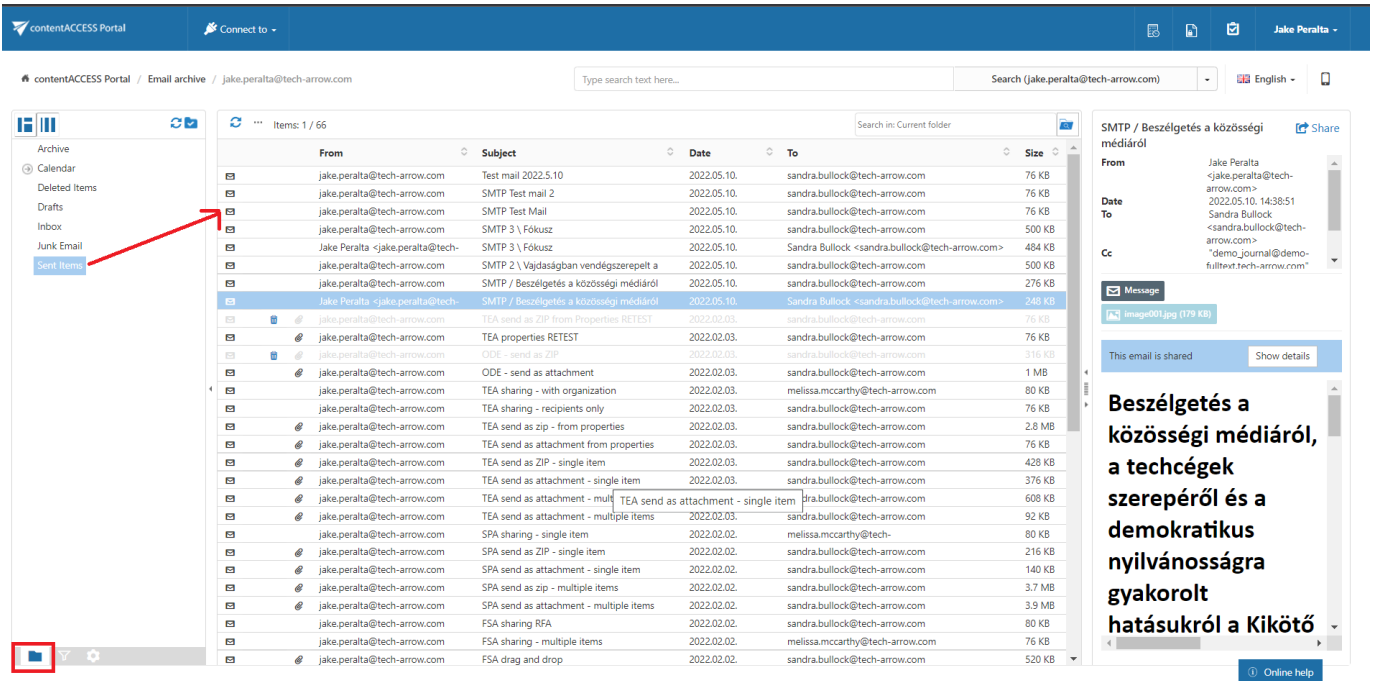
## contentACCESS Portal's navigation pane

By default, the contentACCESS Portal pane displays the folder structure of the selected entity. By using the buttons at the bottom of the contentACCESS Portal 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 contentACCESS Portal, connect to it in the **Connect** to dropdown list first. Select the **Folders** button in the navigation pane and unfold the structure of

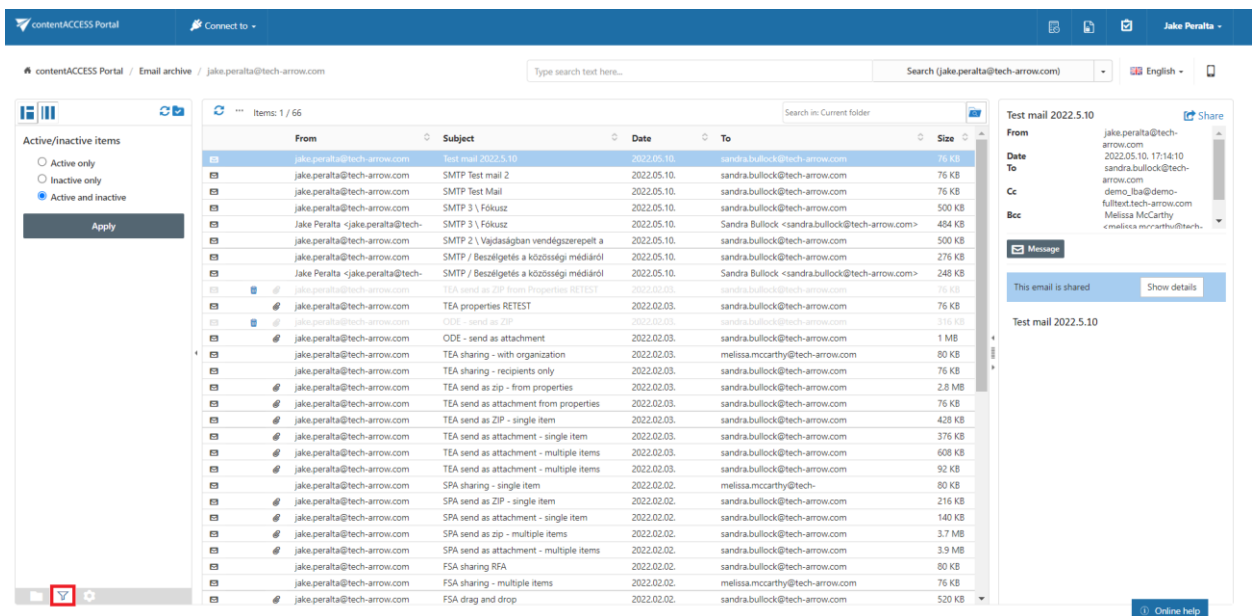
the desired folder.



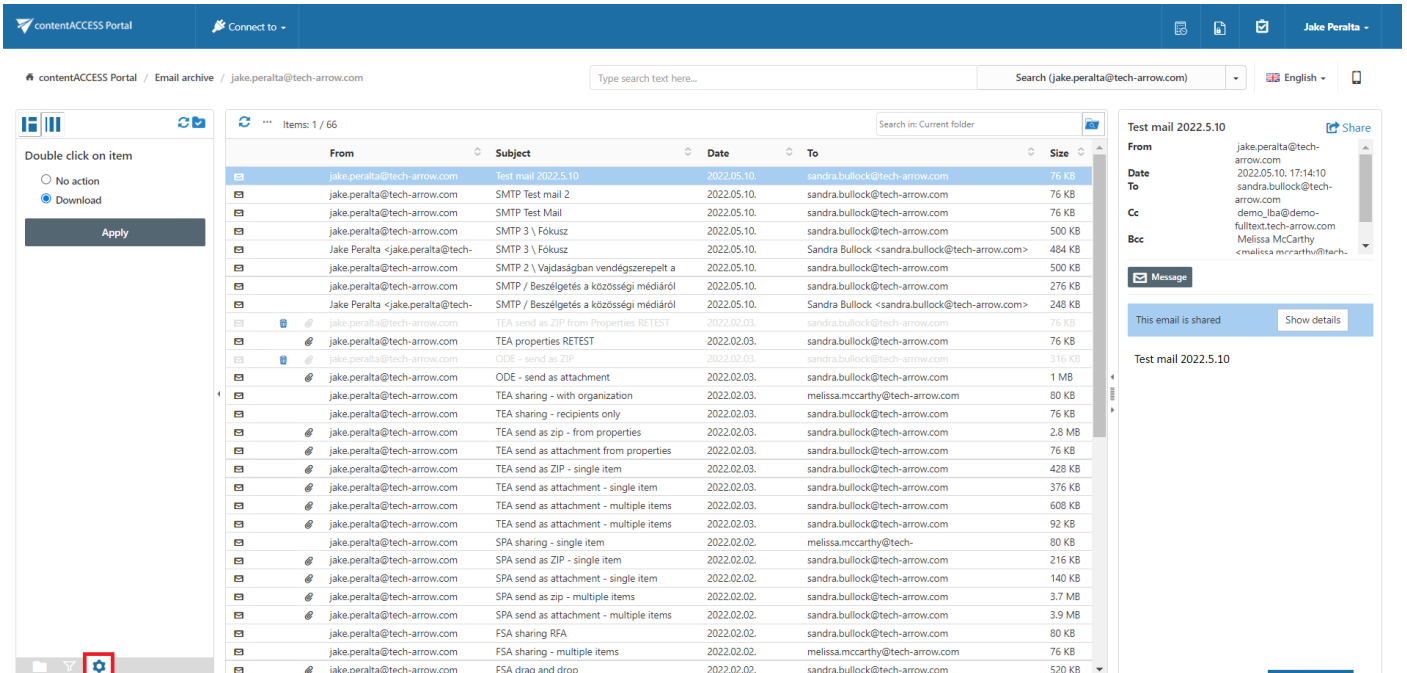
Click on the folder in the pane and the content of the selected folder will be displayed in the item list.

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

- b) **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](#).



- c) **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 contentACCESS Portal](#).



The screenshot displays the contentACCESS Portal interface. At the top, there is a navigation bar with the logo and user information. Below it, a search bar and language selector are visible. The main area is divided into three sections:

- Left Panel:** A navigation pane with a 'Double click on item' section containing 'No action' and 'Download' options, and an 'Apply' button.
- Center Panel:** A list view of email items. The list has columns for 'From', 'Subject', 'Date', 'To', and 'Size'. A red box highlights the column headers. The list contains various email entries with subjects like 'Test mail 2022.5.10', 'SMTP Test mail 2', and 'TEA send as ZIP from Properties RETEST'.
- Right Panel:** An email preview pane for a selected item titled 'Test mail 2022.5.10'. It shows the 'From', 'Date', 'To', and 'Cc' fields. A 'Message' button is present, and a blue bar indicates 'This email is shared' with a 'Show details' button.

## 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 [User interface settings](#)) 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). If the **Preview service** was installed (and enabled in the Central Administration) with the package, the user can download the item or view the file's preview in the Portal. If it wasn't installed, the preview only contains the metadata information/the body of emails), and the user cannot check the file's preview.

**Note:** The Preview service works only in the **file-based models**: File system, OneDrive, SharePoint, and Teams archive (in the folders containing files and in All SharePoint data folders), Sharing, GDPR Application, and GDPR File system.

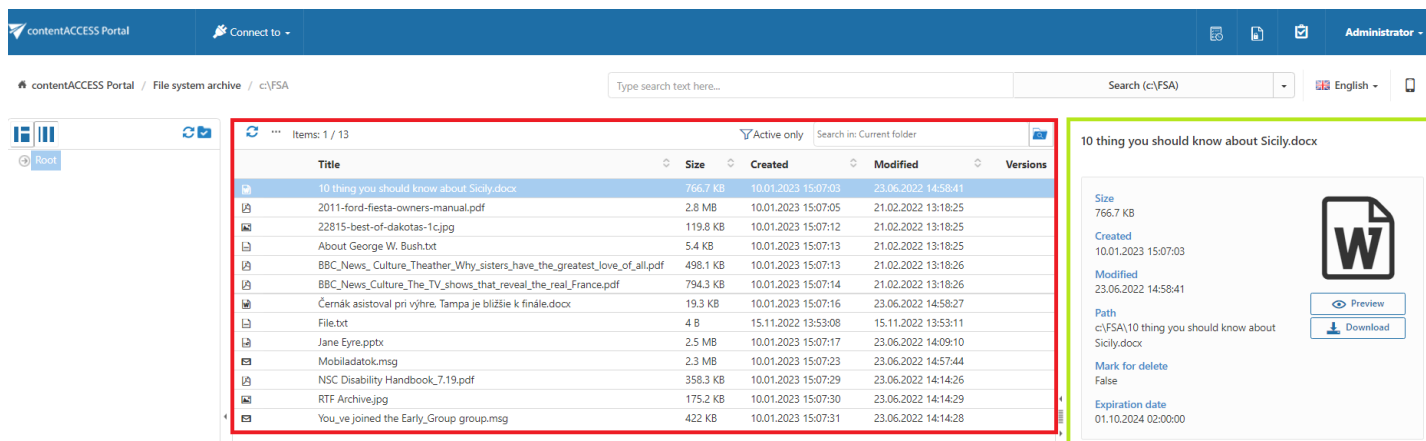


The screenshot displays the 'contentACCESS Portal' interface. The main area shows an email list with columns for From, Subject, Date, To, and Size. A red box highlights the list, and a green box highlights the preview of an email titled 'SMTP / Beszélgetés a közösségi médiáról'. The preview shows the email header, a 'Message' button, and the main content of the email, which discusses the role of community media and mentions 'STARLUX'.

Emails' item list and item preview

The screenshot displays the 'contentACCESS Portal' interface for a file system archive. The main area shows a file list with columns for Title, Size, Created, Modified, and Versions. A red box highlights the list, and a green box highlights the preview of a file titled '10 film to watch this April\_The Northman.txt'. The preview shows the file's metadata, including size, creation date, and modification date, along with a 'Show details' button and a document icon.

Files' item list and item preview (without the Preview service)



The screenshot shows the contentACCESS Portal interface. At the top, there is a navigation bar with 'contentACCESS Portal', 'Connect to -', and 'Administrator'. Below this, the breadcrumb path is 'contentACCESS Portal / File system archive / c:\FSA'. A search bar is present with the text 'Type search text here...' and 'Search (c:\FSA)'. The main area is divided into two parts: a file list on the left and a preview on the right.

Title	Size	Created	Modified	Versions
10 thing you should know about Sicily.docx	766.7 KB	10.01.2023 15:07:03	23.06.2022 14:58:41	
2011-ford-fiesta-owners-manual.pdf	2.8 MB	10.01.2023 15:07:05	21.02.2022 13:18:25	
22815-best-of-dakotas-1c.jpg	119.8 KB	10.01.2023 15:07:12	21.02.2022 13:18:25	
About George W. Bush.txt	5.4 KB	10.01.2023 15:07:13	21.02.2022 13:18:25	
BBC_News_Culture_Theater_Why_sisters_have_the_greatest_love_of_all.pdf	498.1 KB	10.01.2023 15:07:13	21.02.2022 13:18:26	
BBC_News_Culture_The_TV_shows_that_reveal_the_real_France.pdf	794.3 KB	10.01.2023 15:07:14	21.02.2022 13:18:26	
Černák asistoval pri výhre. Tampa je bližšie k finále.docx	19.3 KB	10.01.2023 15:07:16	23.06.2022 14:58:27	
File.txt	4 B	15.11.2022 13:53:08	15.11.2022 13:53:11	
Jane Eyre.pptx	2.5 MB	10.01.2023 15:07:17	23.06.2022 14:09:10	
Mobiladatok.msg	2.3 MB	10.01.2023 15:07:23	23.06.2022 14:57:44	
NSC Disability Handbook_7.19.pdf	358.3 KB	10.01.2023 15:07:29	23.06.2022 14:14:26	
RTF Archive.jpg	175.2 KB	10.01.2023 15:07:30	23.06.2022 14:14:29	
You_ve joined the Early_Group group.msg	422 KB	10.01.2023 15:07:31	23.06.2022 14:14:28	

The preview on the right shows the document '10 thing you should know about Sicily.docx'. It displays the file size (766.7 KB), creation date (10.01.2023 15:07:03), and modification date (23.06.2022 14:58:41). The path is 'c:\FSA\10 thing you should know about Sicily.docx'. There are 'Preview' and 'Download' buttons, along with a 'Mark for delete' option and an expiration date (01.10.2024 02:00:00).

Files' item list and item preview (with the Preview service)

To be able to use the Preview service, the Administrator needs to **install the service** first (you can find more information about the installation process [here](#)), then enable it on the **System page** (for more information refer to [this](#) section of the contentACCESS manual).

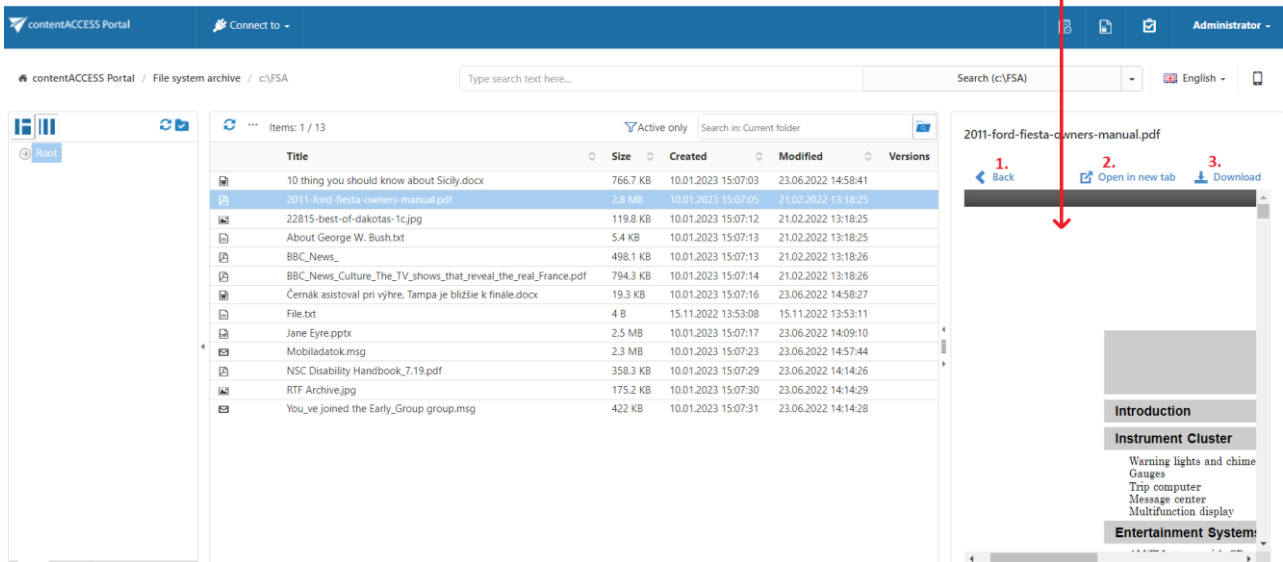
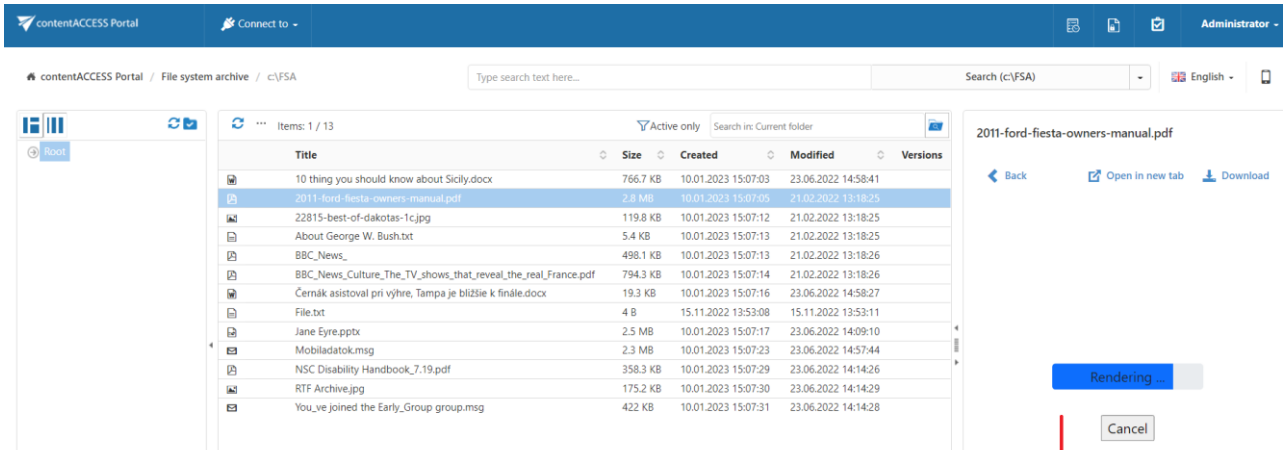
When the **Preview service** is enabled, the **Preview** and **Download** buttons are displayed in the file's preview in addition to the extended metadata information. The Preview service also offers support for video streaming.

- **Download** button – the user can download the item directly from the preview
- **Preview** button – the file's preview is opened, and the user can view the content of the selected item

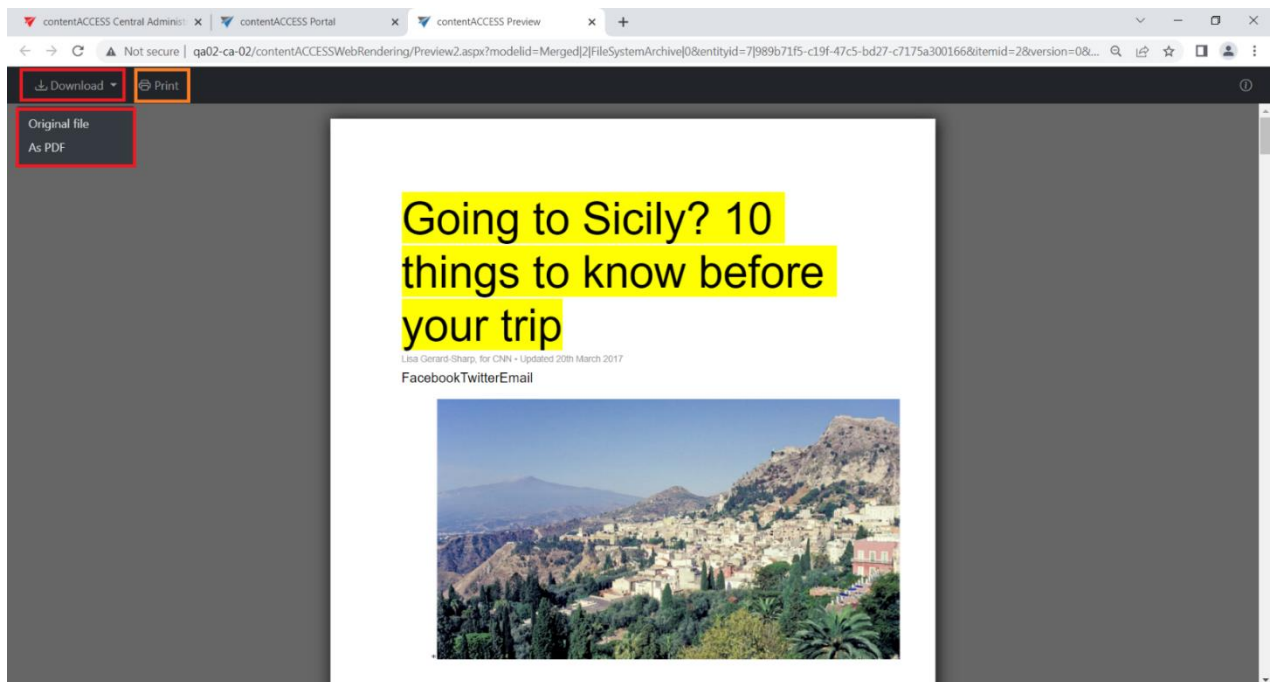
When the file's preview is opened, the following actions are available for the user:

1. **Back** – it leads back to item preview with the metadata
2. **Open in new tab** – opens the file in a new window in the browser
3. **Download** – the user can download the file from here

## Preview



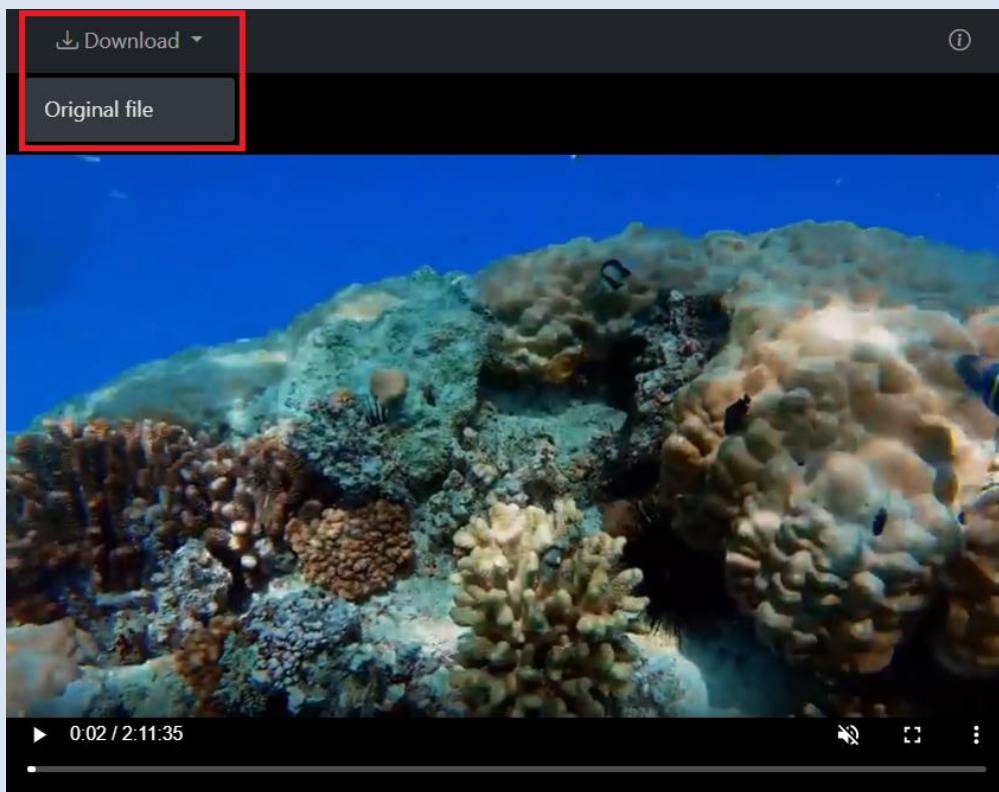
## Open in new tab





When the selected file is opened in a new window in the browser, the user can either check the whole length of the file, print the item, or download it. By clicking on the **Download** button, the user can also decide how he wants to download the original file (by keeping the original extension - .txt, .docx, etc.) or as a PDF. In that case, the file will be converted into a pdf item and downloaded as one.

**Note:** Unlike text files, if you choose to open the video files in a new tab, only the “**Download original file**” option will be accessible.



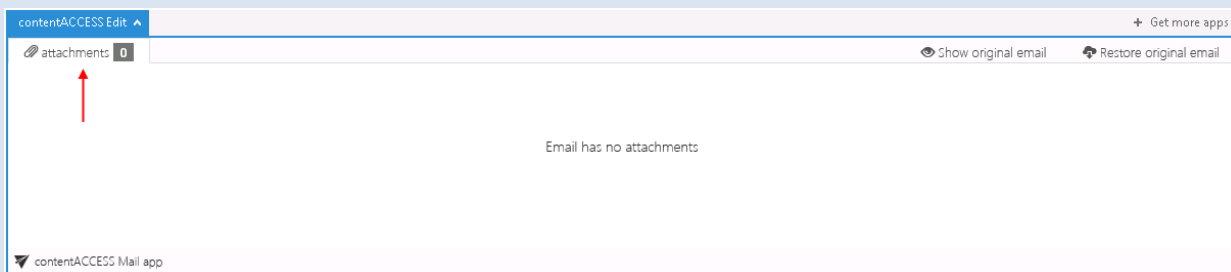
**Supported video files formats:**

Browser	MP4	WebM	Ogg
Edge	YES	YES	YES
Chrome	YES	YES	YES
Firefox	YES	YES	YES
Safari	YES	YES	NO
Opera	YES	YES	YES

For more supported video formats, please refer to [this](#) website.

**Important:** In the Sharing entity, **opening the preview** of an item (as the recipient) is considered a **download** and will **increase the download count**. Also, if the download limit has been reached, the **Preview** button will disappear from the item preview.

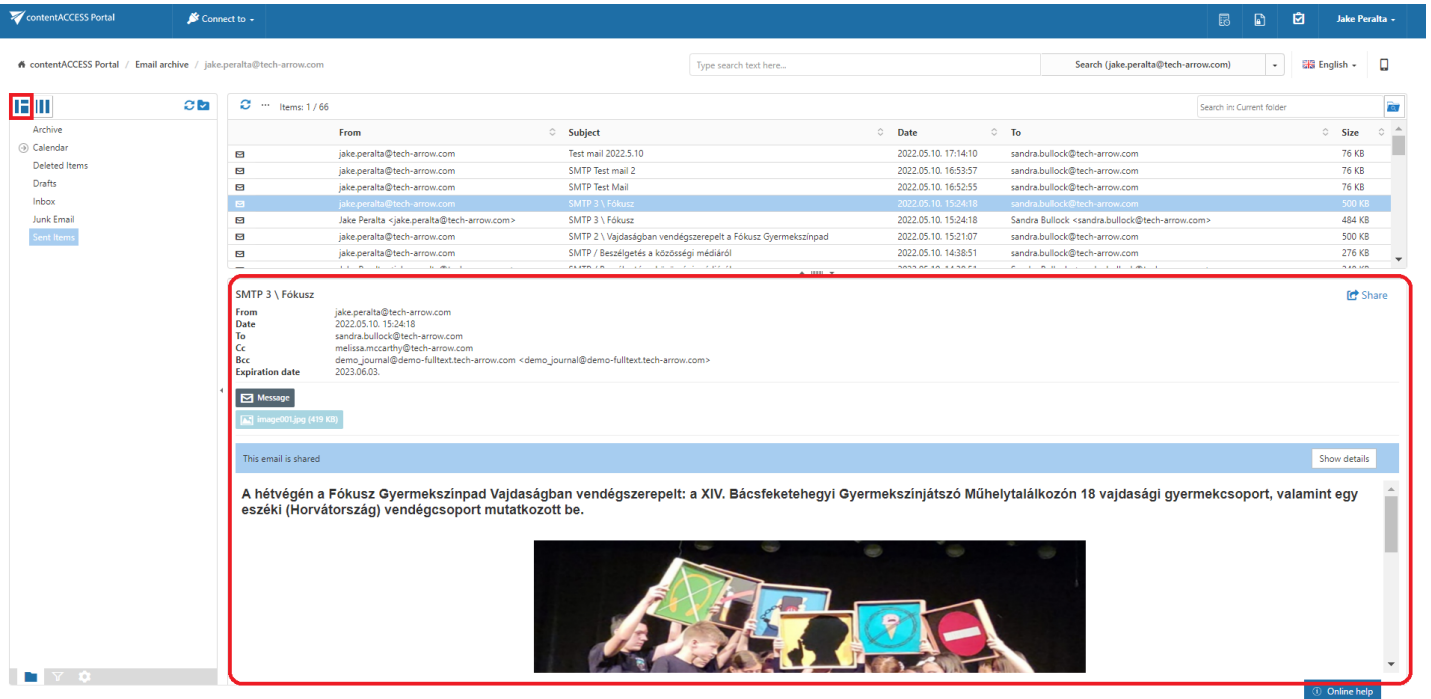
**Note:** The **Split attachments** option is active (checked) by default. That means that the body of the email and the attachment are stored separately. If the email message containing attachments has been archived by a job, where this option is **was not checked**, our apps (MailApp, officeGATE, contentACCESS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



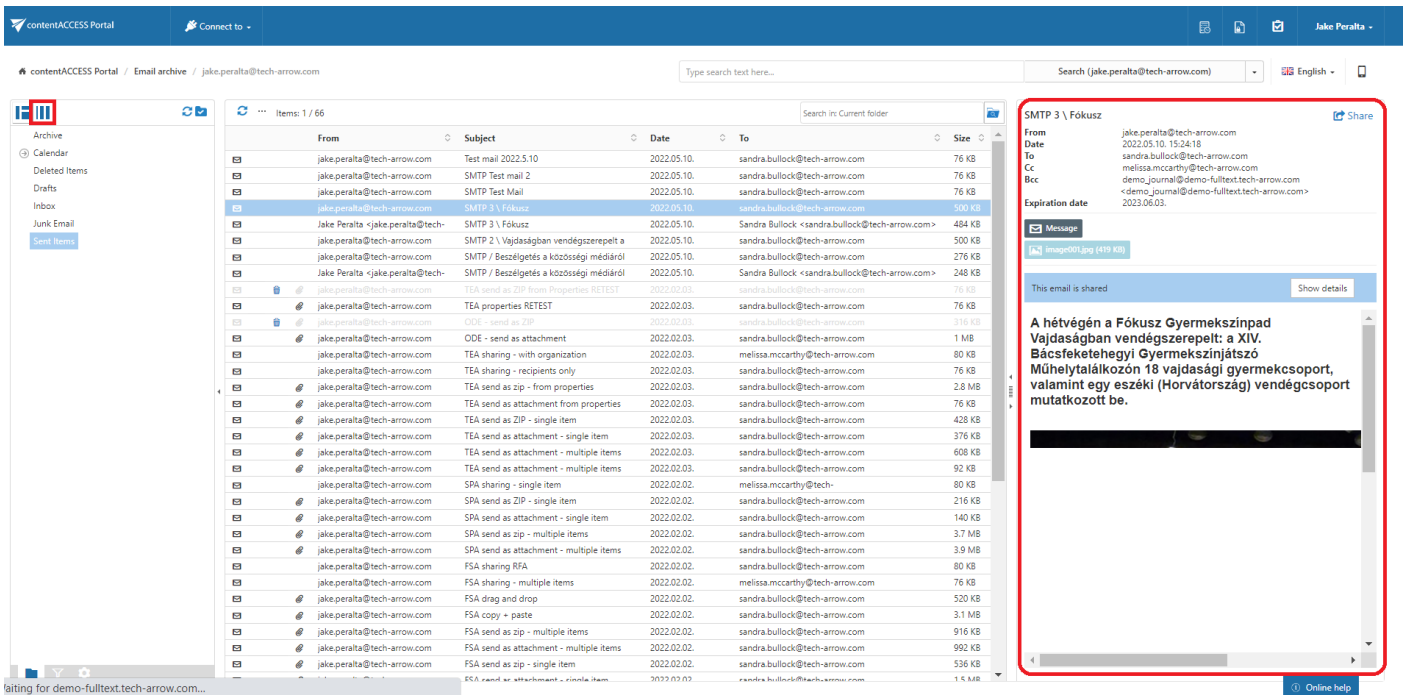
If this option **was checked**, but the email was containing embedded email (.msg attachment), this embedded email won't be displayed between the attachments in our apps.

## 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



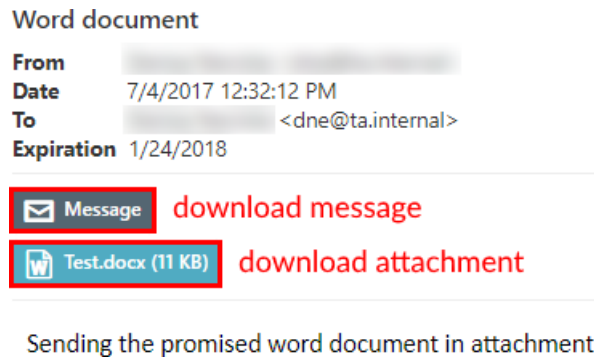
Screenshot B: Reading pane at the right side of the view

## Download from the item list/item preview in contentACCESS Portal

There are three ways how to download the items in contentACCESS Portal:

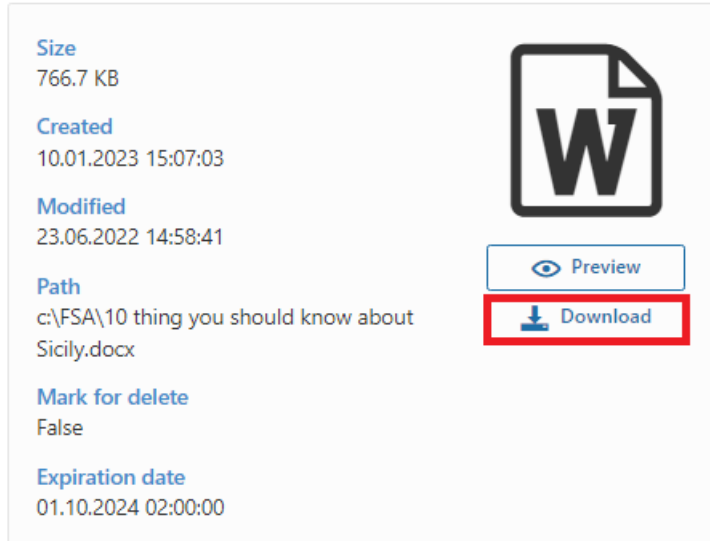


- a) First option is to click on the corresponding button in the item preview. The below displayed screenshots illustrate how it looks in the Email Archive (Screenshot A), and in the File System Archive (Screenshot B):



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

#### 10 thing you should know about Sicily.docx



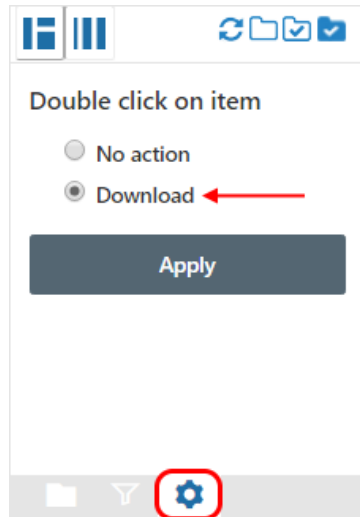
Screenshot B: Downloading an archived file from the item preview

- b) The second (and easier) method of downloading the contentACCESS Portal 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



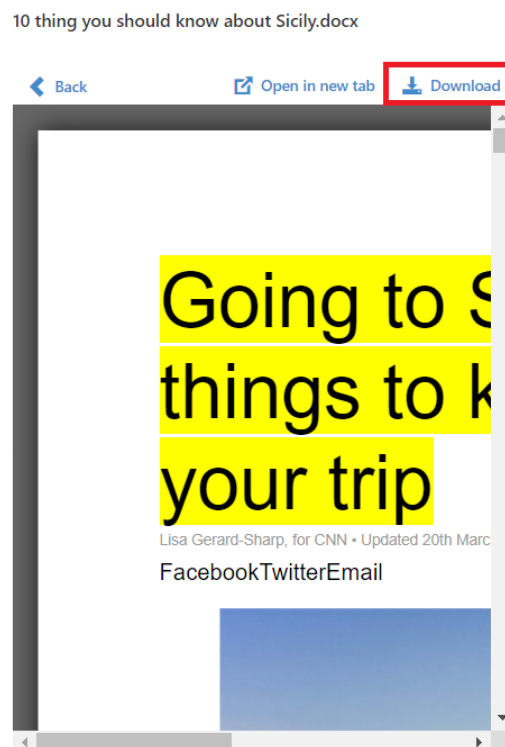


settings must be done: at the bottom of the navigation pane click on the cog mark ( ) and check the “Download” radio button. Then click “Apply”. To disable double click download again, check “No action” radio button and click “Apply”.



c) The third option is to download the file through the Preview service. For this, the Preview service needs to be installed with the [contentACCESS package](#) and enabled on the [System](#) page. In this case, the user can:

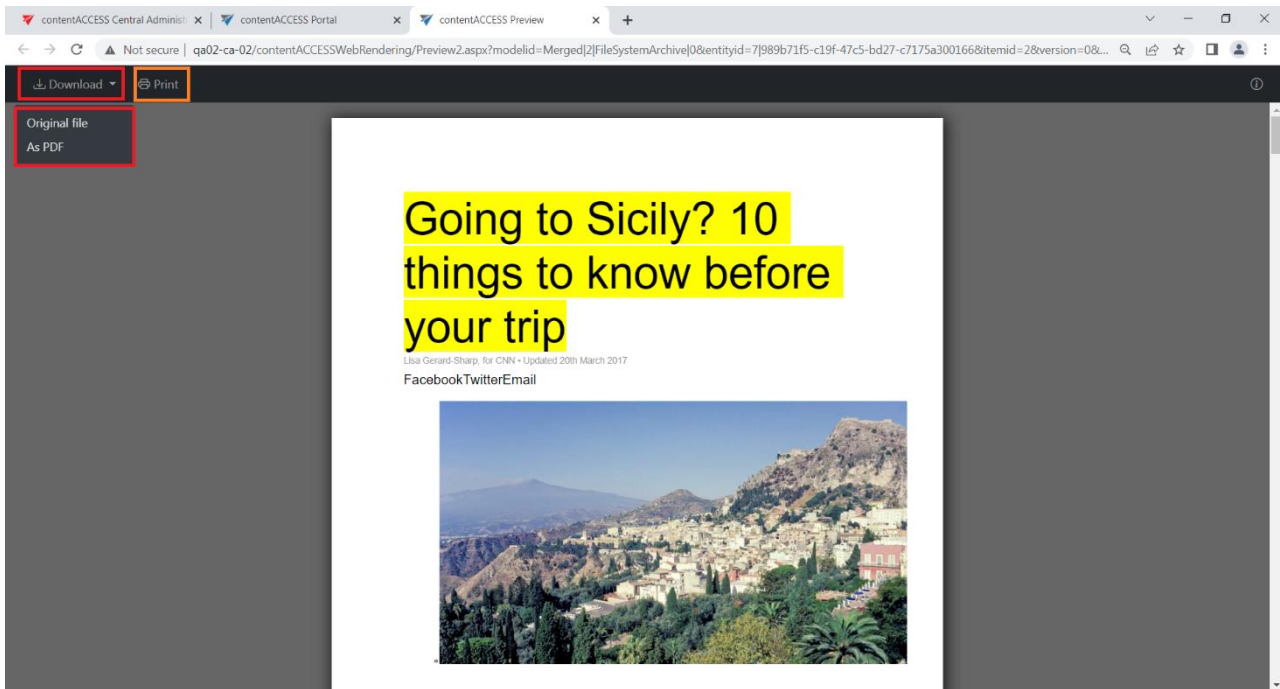
1. download the item from the opened file preview





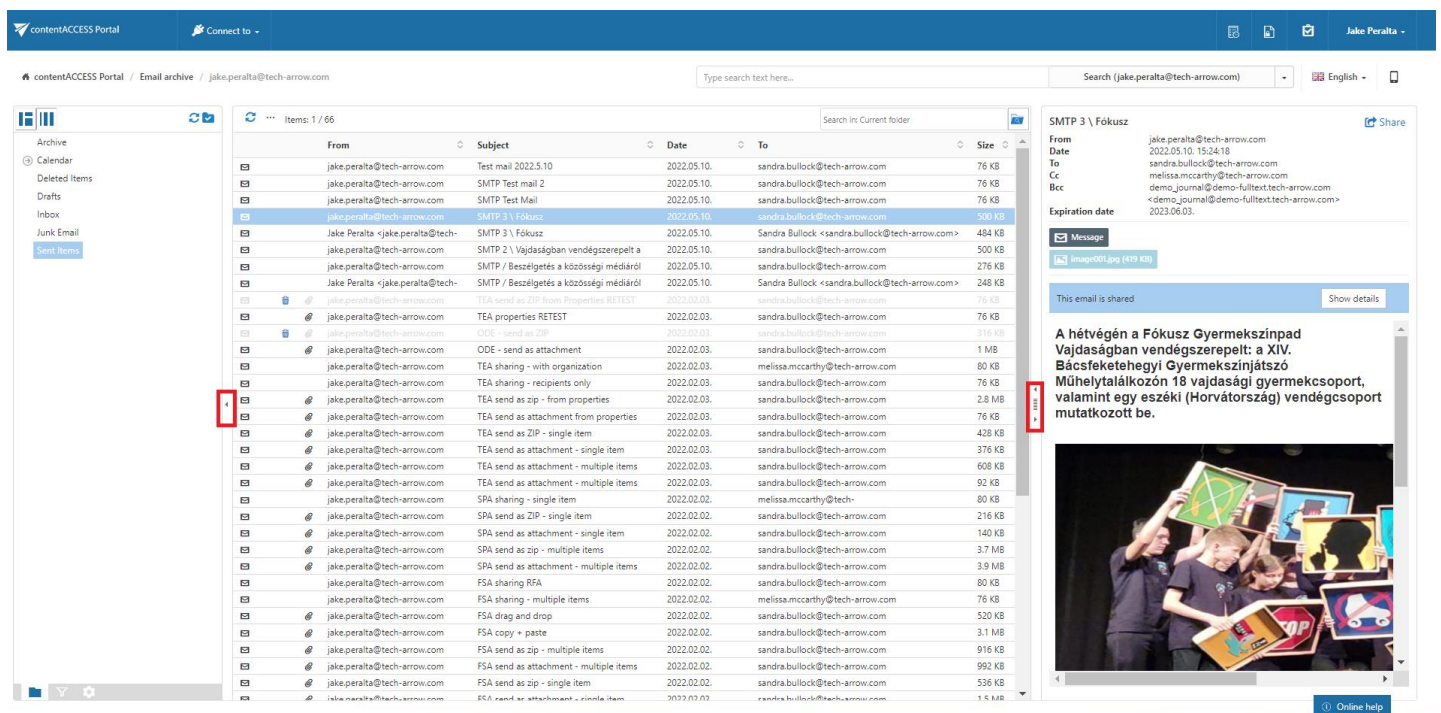


2. open the item in a new tab and download the file from there (For more information, please read [this](#) section of the manual.)



### 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:



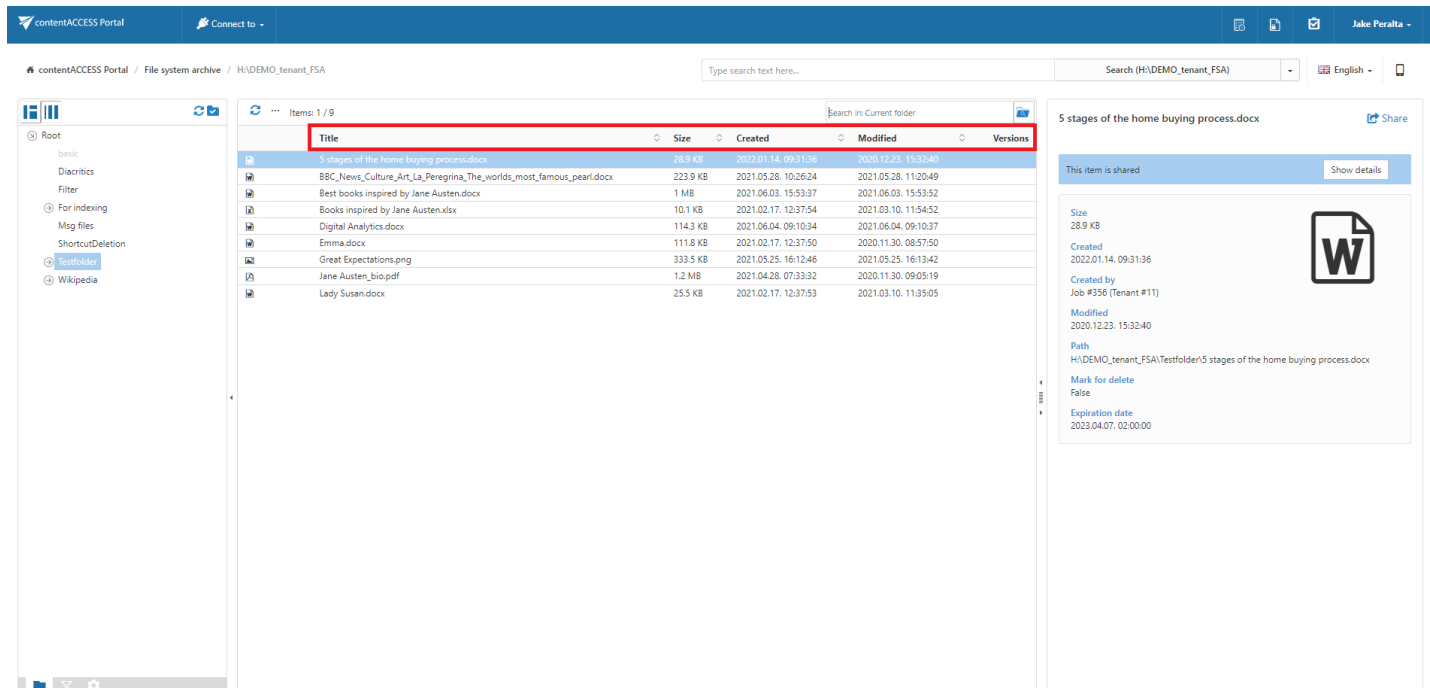
## Sorting in contentACCESS Portal

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

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

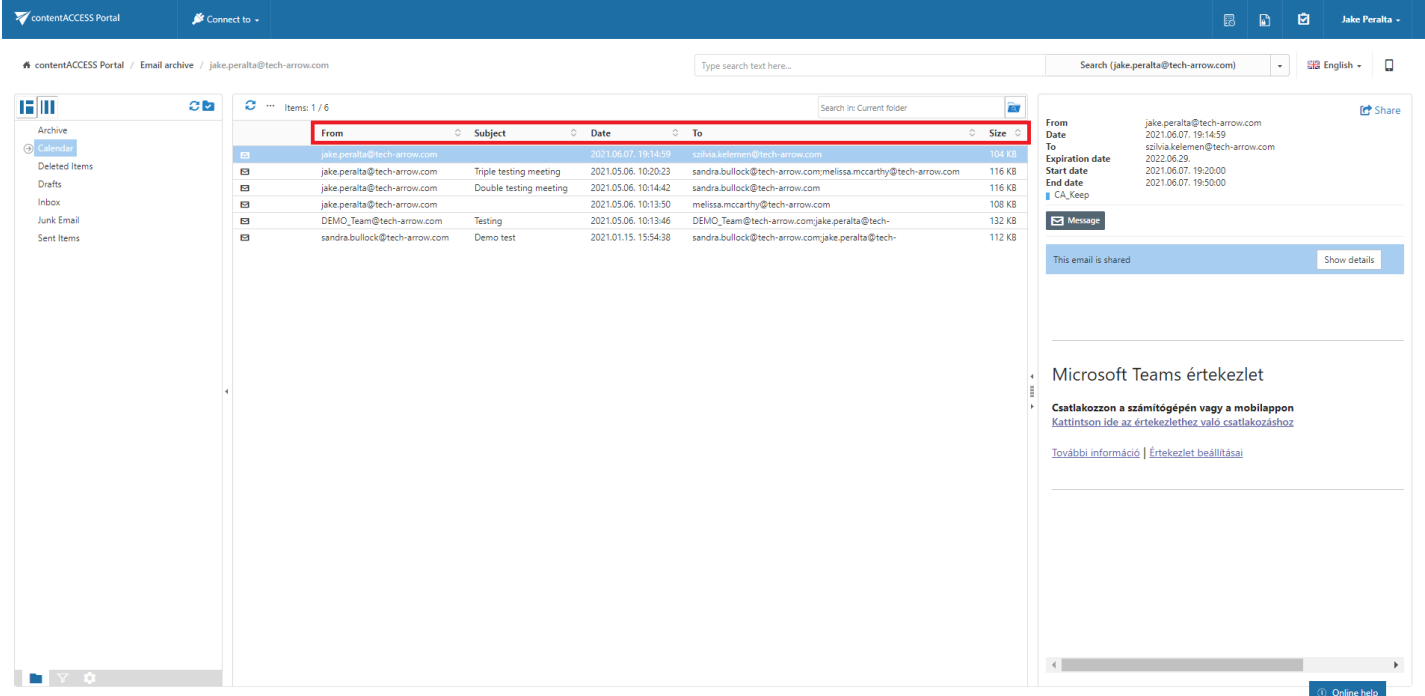


Title	Size	Created	Modified	Versions
5 stages of the home buying process.docx	28.9 KB	2022.01.14, 09:31:36	2020.12.23, 15:32:40	
BBC_News_Culture_Art_La_Peregrina_The_worlds_most_famous_pearl.docx	223.9 KB	2021.05.28, 10:26:24	2021.05.28, 11:20:49	
Best books inspired by Jane Austen.docx	1 MB	2021.06.03, 15:53:37	2021.06.03, 15:53:52	
Books inspired by Jane Austen.xlsx	10.1 KB	2021.02.17, 12:37:54	2021.03.10, 11:54:52	
Digital Analytics.docx	114.3 KB	2021.06.04, 09:10:34	2021.06.04, 09:10:37	
Emma.docx	111.8 KB	2021.02.17, 12:37:50	2020.11.30, 08:57:50	
Great Expectations.png	333.5 KB	2021.05.25, 16:12:46	2021.05.25, 16:13:42	
Jane Austen_bio.pdf	1.2 MB	2021.04.28, 07:33:32	2020.11.30, 09:05:19	
Lady Susan.docx	25.5 KB	2021.02.17, 12:37:53	2021.03.10, 11:35:05	

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;
- ✓ **Date** – enables sorting according to the sent date;
- ✓ **To** – enables sorting according to the addressee;
- ✓ **Size** – enables sorting according to size.

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



From	Subject	Date	To	Size
jake.peralta@tech-arrow.com		2021.06.07. 19:14:59	szilvia.kelemen@tech-arrow.com	104 KB
jake.peralta@tech-arrow.com	Triple testing meeting	2021.05.06. 10:20:23	sandra.bullock@tech-arrow.com;melissa.mccarthy@tech-arrow.com	116 KB
jake.peralta@tech-arrow.com	Double testing meeting	2021.05.06. 10:14:42	sandra.bullock@tech-arrow.com	116 KB
jake.peralta@tech-arrow.com		2021.05.06. 10:13:50	melissa.mccarthy@tech-arrow.com	108 KB
DEMO_Team@tech-arrow.com	Testing	2021.05.06. 10:13:46	DEMO_Team@tech-arrow.com;jake.peralta@tech-	132 KB
sandra.bullock@tech-arrow.com	Demo test	2021.01.15. 15:54:38	sandra.bullock@tech-arrow.com;jake.peralta@tech-	112 KB

From: jake.peralta@tech-arrow.com  
 Date: 2021.06.07. 19:14:59  
 To: szilvia.kelemen@tech-arrow.com  
 Expiration date: 2022.06.29.  
 Start date: 2021.06.07. 19:20:00  
 End date: 2021.06.07. 19:50:00  
 CA\_Keep

Microsoft Teams értekezlet

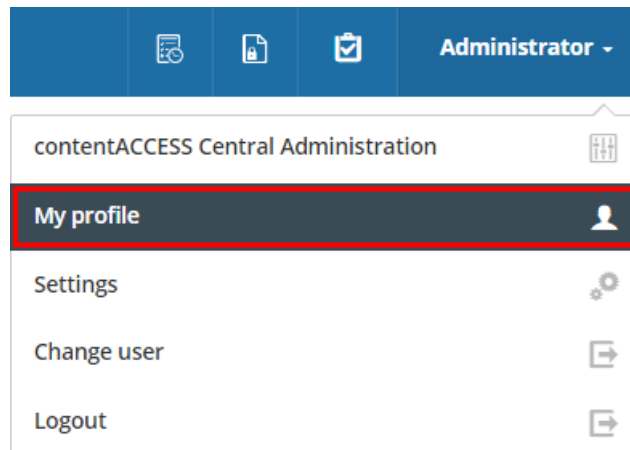
Csatlakozzon a számítógépén vagy a mobilappon  
[Kattintson ide az értekezlethez való csatlakozáshoz](#)

[További információ](#) | [Értekezlet beállításai](#)

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 contentACCESS Portal.



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 contentACCESS Portal, click on the [Go to contentACCESS Portal](#) under the list of login sessions.

User profile
Logout

**Administrator**

**User details:**

Display name: Administrator [change](#)

E-mail address: [change](#)

Tenant: TECH-ARROW

Password: [change](#)

**User logins:**

Provider	Username
Forms	system

**Login sessions:**

Login type	Login name	Last access date	Expiration	IP address	Device
Forms	system	6/29/2022 6:25:32 AM	6/29/2022 7:25:32 AM	10.10.5.173	SmtpServer
Forms	system	6/29/2022 6:26:13 AM	6/29/2022 7:26:13 AM	192.168.183.102	Platform: Desktop, Browser: Chrome (102.0.0.0), OS: Windows
Forms	system	6/29/2022 6:00:04 AM	6/29/2022 7:00:04 AM	127.0.0.1	SYSTEM
Forms	system	6/29/2022 6:26:13 AM	6/29/2022 7:26:13 AM	10.10.5.1	Platform: Desktop, Browser: Chrome (102.0.0.0), OS: Windows

[Go to contentACCESS Portal](#)

## Changing the display name

- click on the [change](#) next to the Display name of the user

Display name: Administrator [change](#)

Tenant: System

Password: [change](#)

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



## Administrator

Display name\*:  ✕

### Changing the password

- click on the [change](#) next to the Password

Display name: Administrator [change](#)

Tenant: System

Password: [change](#) 

- 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*:	<input type="password" value="●●●●●●●●"/>
New password*:	<input type="password" value="●"/>
Password strength	Too short
Confirm password*:	<input type="password"/>



**Change password**

Current password\*:

New password\*:

Password strength **Weak**

Confirm password\*:

**Change password**

Current password\*:

New password\*:

Password strength **Fair**

Confirm password\*:

**Change password**

Current password\*:

New password\*:

Password strength **Good**

Confirm password\*:



**Change password**

Current password*:	●●●●●●●●
New password*:	●●●●●●●●●●●●●●●●
Password strength	Strong
Confirm password*:	

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

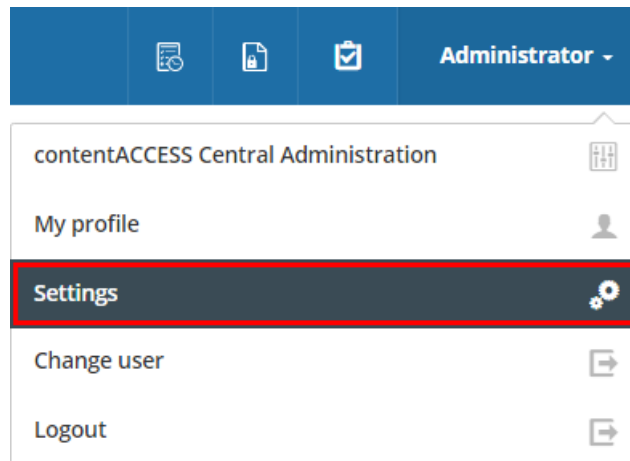
**Change password**

Current password*:	●●●●●●●●
New password*:	●●●●●●●●●●●●●●●●
Password strength	Strong
Confirm password*:	●●●●●●●●●●●●●●●●

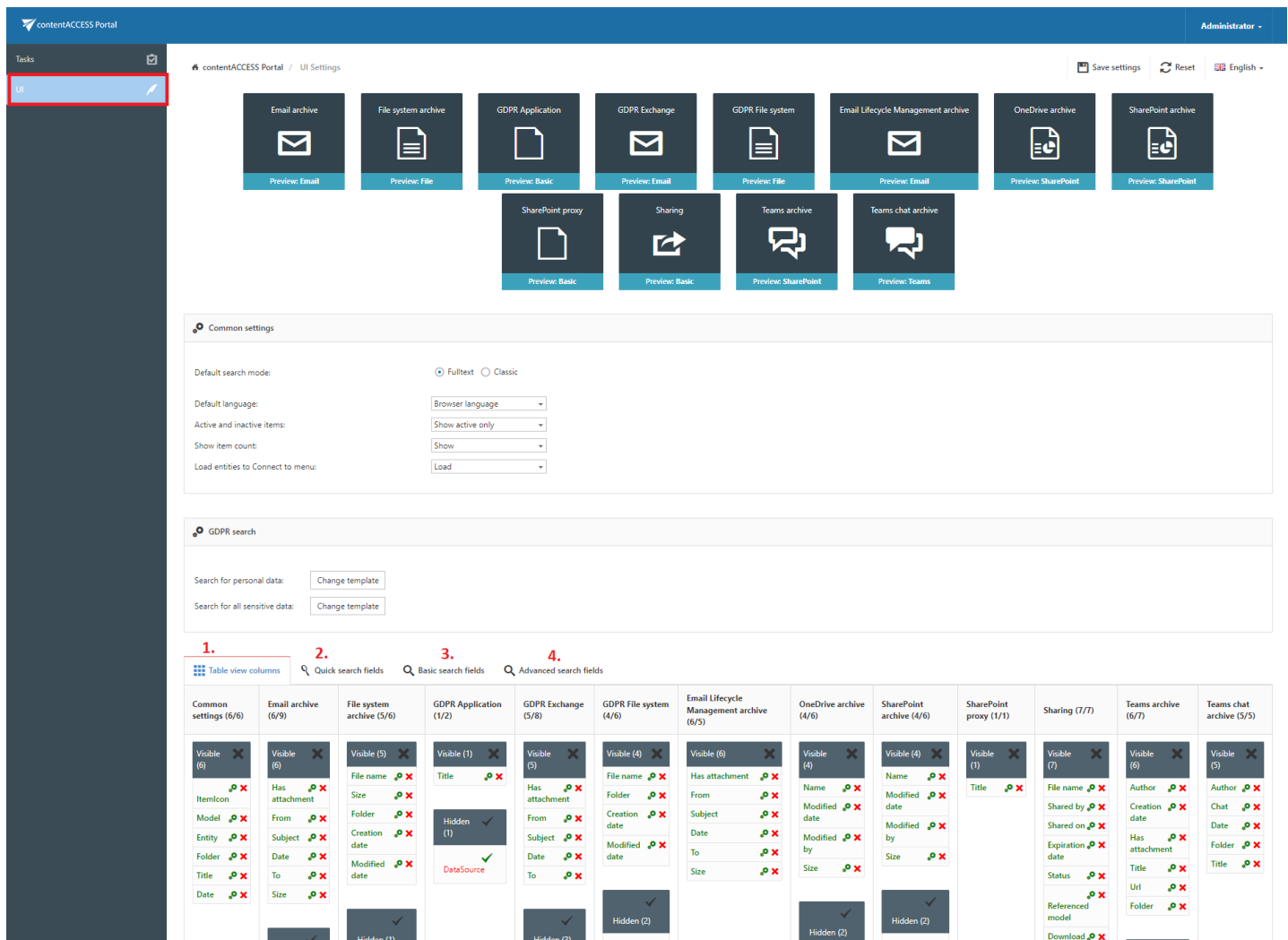
Password successfully changed!

## User interface settings

contentACCESS Portal’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.

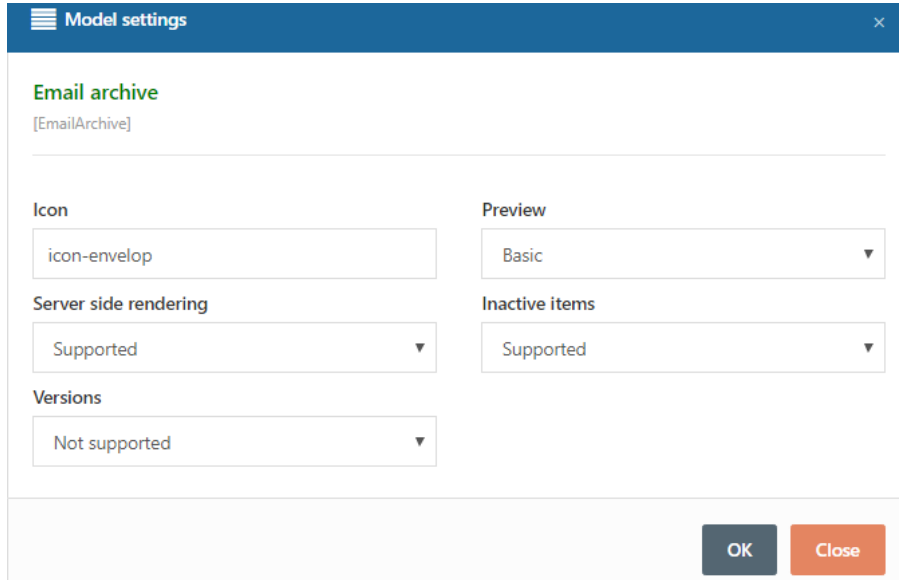


The **UI Settings** page features the following configuration options:

### Model settings

Display settings of the available models can be changed by clicking on the respective window.





Screenshot: Email archive model settings

**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 contentACCESS Portal language for the users. If the Browser language is selected and contentACCESS Portal supports that language (has a translation), it will use the users browser language. If contentACCESS Portal 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

- **Show item count**



The administrator can choose if the item count of folders will be displayed or not. If the administrator chooses not to display it, the system won't have to query the item count from a folder.

- **Load entities to Connect to menu**

If the administrator chooses not to load the entities, the user will be redirected directly to the **Browse menu** after clicking on the **Connect to menu**.

## GDPR search

Here it is possible to change the predefined patterns that are used by [GDPR search](#).

**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, basic 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  ( ) in the table of **Visible** columns. Clicking the checkmark  ( ) 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.

Sharing (4/5)	Common settings (6/6)	Email archive (6/8)	File system archive (5/6)	SharePoint archive (4/6)	Teams archive (6/7)	Teams chat archive (4/4)
<p>Visible (4) <span>✕</span></p> <ul style="list-style-type: none"> <li>File Name <span>🔍</span> <span>✕</span></li> <li>Expiration date <span>🔍</span> <span>✕</span></li> <li>Download limit <span>🔍</span> <span>✕</span></li> <li>Download count /limit <span>🔍</span> <span>✕</span></li> </ul> <p>Hidden (3) <span>✓</span></p> <ul style="list-style-type: none"> <li>Creation Date <span>✓</span></li> <li>Download Limit <span>✓</span></li> <li>Expiration Date <span>✓</span></li> </ul>	<p>Visible (6) <span>✕</span></p> <ul style="list-style-type: none"> <li>Item Icon <span>🔍</span> <span>✕</span></li> <li>Model <span>🔍</span> <span>✕</span></li> <li>Entity Name <span>🔍</span> <span>✕</span></li> <li>Folder <span>🔍</span> <span>✕</span></li> <li>Title <span>🔍</span> <span>✕</span></li> <li>Date <span>🔍</span> <span>✕</span></li> </ul>	<p>Visible (6) <span>✕</span></p> <ul style="list-style-type: none"> <li>Has Attachment <span>🔍</span> <span>✕</span></li> <li>From <span>🔍</span> <span>✕</span> <span style="border: 1px solid blue; border-radius: 50%; padding: 2px;">🔍</span></li> <li>Subject <span>🔍</span> <span>✕</span></li> <li>Date <span>🔍</span> <span>✕</span></li> <li>To <span>🔍</span> <span>✕</span></li> <li>Size <span>🔍</span> <span>✕</span></li> </ul> <p>Hidden (3) <span>✓</span></p> <ul style="list-style-type: none"> <li>Folder <span>✓</span></li> <li>Is Reply <span>✓</span></li> <li>Unread <span>✓</span></li> </ul>	<p>Visible (5) <span>✕</span></p> <ul style="list-style-type: none"> <li>File Name <span>🔍</span> <span>✕</span></li> <li>Size <span>🔍</span> <span>✕</span></li> <li>Folder <span>🔍</span> <span>✕</span></li> <li>Creation Date <span>🔍</span> <span>✕</span></li> <li>Modified Date <span>🔍</span> <span>✕</span></li> </ul> <p>Hidden (1) <span>✓</span></p> <ul style="list-style-type: none"> <li>Modified By <span>✓</span></li> </ul>	<p>Visible (4) <span>✕</span></p> <ul style="list-style-type: none"> <li>Name <span>🔍</span> <span>✕</span></li> <li>Modified Date <span>🔍</span> <span>✕</span></li> <li>Modified By <span>🔍</span> <span>✕</span></li> <li>Size <span>🔍</span> <span>✕</span></li> </ul> <p>Hidden (2) <span>✓</span></p> <ul style="list-style-type: none"> <li>Creation Date <span>✓</span></li> <li>Url <span>✓</span></li> </ul>	<p>Visible (6) <span>✕</span></p> <ul style="list-style-type: none"> <li>Author <span>🔍</span> <span>✕</span></li> <li>Creation date <span>🔍</span> <span>✕</span></li> <li>Folder <span>🔍</span> <span>✕</span></li> <li>Has attachment <span>🔍</span> <span>✕</span></li> <li>Title <span>🔍</span> <span>✕</span></li> <li>Url <span>🔍</span> <span>✕</span></li> </ul> <p>Hidden (1) <span>✓</span></p> <ul style="list-style-type: none"> <li>Channel <span>✓</span></li> </ul>	<p>Visible (4) <span>✕</span></p> <ul style="list-style-type: none"> <li>Author <span>🔍</span> <span>✕</span></li> <li>Chat <span>🔍</span> <span>✕</span></li> <li>Date <span>🔍</span> <span>✕</span></li> <li>Title <span>🔍</span> <span>✕</span></li> </ul>

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

**Column settings** ✕

**From**  
[String]

---

**Field name:**  **Title**

**Format**

**Sortable**  YES

**Visibility**  Always  
Standard view only  
Advanced search view only

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)



Items: 1 / 3 Active only Search in selected folder...

From	Subject	Date	To	Size
Administrator <Administrator@ta.internal>	contentACCESS invitation	12/5/2017 3:37 PM	<dne@ta.internal>	49152
Administrator <Administrator@ta.internal>	contentACCESS license error	12/5/2017 3:37 PM	<dne@ta.internal>	45056
Administrator <Administrator@ta.internal>	contentACCESS license warning	12/5/2017 3:37 PM	<dne@ta.internal>	45056

Items: 1 / 3 Active only Search in selected folder...

Sender	Subject	Date	To	Size
Administrator <Administrator@ta.internal>	contentACCESS invitation	12/5/2017 3:37 PM	<dne@ta.internal>	49152
Administrator <Administrator@ta.internal>	contentACCESS license error	12/5/2017 3:37 PM	<dne@ta.internal>	45056
Administrator <Administrator@ta.internal>	contentACCESS license warning	12/5/2017 3:37 PM	<dne@ta.internal>	45056

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

Items: 1 / 3 Active only Search in selected folder...

visible column

From	Subject	Date	To	Size
Administrator <Administrator@ta.internal>	contentACCESS invitation	12/5/2017 3:37 PM	<dne@ta.internal>	49152
Administrator <Administrator@ta.internal>	contentACCESS license error	12/5/2017 3:37 PM	<dne@ta.internal>	45056
Administrator <Administrator@ta.internal>	contentACCESS license warning	12/5/2017 3:37 PM	<dne@ta.internal>	45056

Items: 1 / 3 Active only Search in selected folder...

"Date" column is hidden

From	Subject	To	Size
Administrator <Administrator@ta.internal>	contentACCESS invitation	<dne@ta.internal>	49152
Administrator <Administrator@ta.internal>	contentACCESS license error	<dne@ta.internal>	45056
Administrator <Administrator@ta.internal>	contentACCESS license warning	<dne@ta.internal>	45056



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

Items: 1 / 3 Active only Search in selected folder...

sorting by this column is disabled

From	Subject	Date	To	Size
Administrator <Administrator@ta.internal>	contentACCESS invitation	12/5/2017 3:37 PM	<dne@ta.internal>	49152
Administrator <Administrator@ta.internal>	contentACCESS license error	12/5/2017 3:37 PM	<dne@ta.internal>	45056
Administrator <Administrator@ta.internal>	contentACCESS license warning	12/5/2017 3:37 PM	<dne@ta.internal>	45056

## Search functions in contentACCESS Portal: "Connect to search", quick search, advanced search, GDPR search

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

## Search query language

The search query language is used to specify conditions on documents which have to be returned as result when searching the archive.

All search conditions can be negated using the **NOT** keyword. The keyword is **case sensitive**, so it must be **always written in UPPERCASE**. The **exclamation mark “!”** is a shorter version of the NOT keyword and has the exact same function. The syntax may look like as follows:

### For freetext search:

- NOT value
- !value

### For property search:

- Subject:(NOT test)
- Subject:(!test)

You can also combine the NOT operator with:

- **phrase queries:** NOT “this is a test”
- **regex queries:** filename:(NOT \*\*[0-9]{3}.txt)
- **wildcard queries:** NOT test\*
- **range queries:** Size:(NOT 1M,2M) OR Date:(NOT 2020-01-01,2020-12-31)

### Samples for the most commonly used searches in the different models, tenants or search everywhere:

- From: ([jake.peralta@tech-arrow.com](mailto:jake.peralta@tech-arrow.com)) AND HasAttachment: (YES) AND SentDate: (last month) – the user can search for emails or messages which meet these criteria
- Attachment: (Computer.docx); Attachment: (pride\*) – if the user uses the whole file name, the search results list will contain the items with the same name and extension, and if the user search



for a phrase (pride\*), then the search results list will show items where this word is part of the title or those documents which contain this phrase

- Source:(teams) AND price – search everywhere: the search results list will contain items from the Teams archive AND items with the phrase “price”
- Source:(sharepoint) AND price AND Size:(>1MB) – the search results will come from the Share-Point AND only those items which contains the phrase “price” AND bigger than 1MB

The search query language used in any user interface of contentACCESS can be divided into following categories:

## Source specification

The searching user can specify where to search on different levels: tenant, model, entity

**Source:(string)** – select a model by keyword; search in models having the specified string as a keyword (email, file, sharepoint). This is similar as the MTID mentioned, but accepts more free model specification.

Possible values are:

- For FileSystemArchive: archive, file, fs, filesystem
- For EmailArchive: archive, email, mail, mailarchive, emailarchive
- For GDPR Application: application, db, database, gdpr
- For GDPR Exchange: exchange, gdpr, mail, email
- For GDPR FileSystem: file, fs, filesystem, gdpr
- For OneDriveArchive: onedrive, onedrivearchive
- For SharePointArchive: archive, sharepoint, sharepointarchive, sp
- For Sharing: sharing, share, sharedfiles
- For TeamsArchive: archive, teams, teamsarchive, tea
- For TeamsChatArchive: archive, teams, chat, teamschat, teamschatarchive, tca

Examples:

 source:file



? source:mail

**Tenant:(string)** - select a tenant by name; search in tenants having the specified string in name

**MTID:(string)** - select a model by type identifier (EmailArchive, FileSystemArchive, SharePointArchive, TeamsArchive, TeamsChatArchive)

**Entity:(string)** - select one or more entities by name; search in entities having the specified string in name. Entity name is mailbox address in Email archive and Root folder path in File system archive.

Examples:

? entity:john.smith@tech-arrow.com - search in John Smith's mailbox

? entity:c:\temp - search in c:\temp folder

It is also possible to exclude models from the search with the **NOT** or **exclamation mark "!"** keyword. For example, you search in **everywhere** (the NOT search with the Source and Entity makes sense only in Search everywhere) and don't want to search in the Email archive => add condition **Source:(NOT email)**, and the Email archive will be excluded from the search. **Entity:(string)** - select one or more entities by name; search in entities having the specified string in name. Entity name is mailbox address in Email archive and Root folder path in File system archive.

Examples:

- Source:(NOT email) - Email archive will be excluded from the search
- Source:(!file) "pride and prejudice" - the search result list will contain only those items, which meet the condition
- Source:(NOT teams) source:(!sharing) - Teams, Teams chat archive and Sharing models are excluded from the search
- Source:(!sharing) AND title:("The Picture of Dorian Gray.docx") - only items with the title "The Picture of Dorian Gray.docx" will be displayed and the items from the Sharing model are excluded
- Source:(NOT sharing) Source:(!teams) AND FileName:(!"titanic.pptx") - the selected models and item will be excluded from the search
- Source:(NOT chat) Source:(NOT file) Source:(NOT sharing) Source:(!sharepoint) - these models will



be excluded from the search results

In addition, the users can exclude entities from the search by using the **NOT** keyword. In this case – for example -, the user has **access to multiple entities within the models** (mailboxes or root folders), and during searching everywhere, the user wants to exclude one or more of these entities. Example: **source:(email) AND entity:(NOT \*@internal.com)** => the user wants to search in the Email archive, but not in the specified mailboxes.

Examples:

- **source:(filesystem) entity:(NOT \*foldersharing)** – the search result list will contain only the File system model and will exclude the root connection fitting the condition
- **source:(email) AND entity:(!\*internal.com)** – the search will exclude the internal.com mailboxes from the search
- **source:(email) AND entity:(!emily)** – Emily’s mailbox will be excluded from the search in the Email archive
- **entity:(NOT Emily.bronte)** – entities, which are displayed/used in this format will be excluded from the search (example: Sharing, Email archive)
- **Entity:(NOT Emily Bronte)** – entities, which are displayed in this format will be excluded from the search (example: Teams Chat archive, OneDrive archive)

## Property value specification

The following properties can be used to specify conditions on documents to be returned as result when searching the archive:

### Date

Applicable only for properties of “date” type. Exact date specification has to be in format YYYY-MM- DD (no hours, minutes, seconds can be specified).

Example:

- ❓ **date:(2016-12-05)** (year-month-day; searches for items only from that specified day, in this case 5<sup>th</sup> of December 2016)
- ❓ **date:(2016-12)** (year-month; searches only for items from that specified month, in this case December 2016)





**?** `date:(2016)` (year; searches for items from whole year 2016)

Date intervals can be specified too, for example:

- `date:(>2016-12)` (searches for items younger than from December 2016)
- `date:(<2019-11-10)` (searches from items older than from 10th of November 2019)
- `date:(2017-10, 2017-12)` (searches for items created from October 2017 to December 2017)

Available placeholders: `now` – means this hour; `today`, `yesterday`, `this week`, `last week`, `this month`, `last month`, `this year`, `last year`

Example:

- `date:(now)`, `date:(last week)`

## Number

Numbers are written as usually (1, 2, 3...). For the size conditions also units can be specified:

**K** | **KB** – size in kilobytes

**M** | **MB** – size in megabytes

**G** | **GB** – size in gigabytes | **T** | **TB** – size in terabytes

Example:

**?** `size:(>1K)` – files or emails (depending on the archive) larger than 1 KB

## Range

Two types of ranges can be specified: numerical and date ranges. Ranges can be upper bound, lower bound or an interval. A range can be specified as a value for all properties of type “date” and “number”.

**Prop:(>value)** – the value of property “Prop” is greater than “value”

**Prop:(<value)** – the value of property “Prop” is less than “value”

**Prop:(value1, value2)** – the value of property “Prop” is greater than “value1” and less than “value2”



Examples:

- size:(1K, 1M) – files/emails (depending on the archive) larger than 1KB and smaller than 1MB
- date:(2016-10, 2016-12) – files created/modified or emails sent (depending on the archive) in the last quarter of 2016

## Filename

Finds items by attachment name (Email archive) or file name (File archive). Wildcard characters can be used for filename pattern specification (\* or ?). They have the same meaning as when searching for files in Windows.

**Filename:(\*.txt)** – this will find all attachments and files having the extension .txt

**Filename:(file)** – this will find attachments and files having the exact name “file”

**Filename:(file.\*)** - this will find attachments and files named “file” of any type (extension)

## Text

Properties with text values can be searched for a **single term** and **phrase** or **multiple terms** and **phrases**. Results of a single-term search will contain documents having the specified term in the text value of the specified property. Results of a multi-term search will contain documents having all of the specified terms in the text value of the specified property in any order.

Example:

- Subject:(lemon) – finds emails having the term "lemon" in their subject
- Subject:(lemon orange) – finds emails having the terms "lemon" and "orange" anywhere in their subject

Phrases must be enclosed in double quotes. Results of a phrase search will contain items having all of the specified terms in the text value of the specified property in the specified order.

Example:

- Subject:("John Smith") – finds emails having the name "John Smith" in their subject in the specified



order

## Character escaping

The following characters have special meaning in the query syntax:

`? ( ) " : \`

They cannot be used directly in search terms. They have to be escaped using a backslash '\', otherwise the search query will be ambiguous and will produce unexpected results.

Example:

- `Subject:(apple \(\pear\))` – finds emails having the terms "apple" and "pear" in their subject
- `8\:00` – finds documents containing the text 8:00

## Boolean queries

Boolean query is a search type that allows you to combine desired keywords with operators like AND and OR to get more specific results.

### Operator AND

This operator will narrow your search down to items containing only the words separated by it. Every blank space has the same meaning as the AND operator.

Example (both will do the same):

- `content AND access AND email AND archive`
- `content access email archive`

### Operator OR

This operator, on the other hand, expands your search by connecting multiple phrases. The OR operator works like “at least one phrase from the entered must be present”. It means that the search will return results containing one of the selected phrases, two, three...or even all.

Example:



- content **OR** access – finds all item containing “content” or “access” or “content access”

## Grouping

Multiple terms or clauses can be grouped together by using parentheses “( )” to form sub-queries, for example:

- (email OR file) AND archive - the returned results must contain at least one of the following: email archive, file archive

## Regular expressions

Regular expression (regexp) is a sequence of characters defining a search pattern. This pattern is then often use to “find” or to “find and replace” strings. Regular expressions can be specified in search query by using double asterisk prefix:

\*\*<regular-expression-pattern>

Regular expressions can be used for property queries, but also for free text queries.

## Standard operators

### *Anchoring*

It is possible to define the start and end on a string for your regexp pattern, but it needs to be anchored specifically. The symbol ^ indicates the beginning, while the \$ symbol indicates the end.

Patterns are always anchored by default. The provided pattern must match the entire string. Forexample, for string "abcde":

- ab.\* = match
- abcd = no match

### *Allowed characters*

Any Unicode character may be used in the pattern, but there are some exceptions that are reserved and must be escaped. The standard reserved characters are:



?.?+\*|{}[]()"\

If you enable optional features (described in this section), then the following characters may also be reserved:

# @ & < > ~

**Note:** Any reserved character can be escaped using a backslash “\”, including the backslash character itself “\”.

Any character (except double quotes) is interpreted literally when bounded by double quotes:

john"@smith.com"

### Match any character

The period symbol "." can be used to represent any character. The string "abcde" can be found like this:

- ab... = match
- a.c.e = match

### Once or more

The plus symbol "+" can be used to repeat the preceding pattern once or multiple times. The string "aaabbb" can be found like this:

- a+b+ = match
- aa+bb+ = match
- a+.+ = match
- aa+bbb+ = match

### Zero or more times

The asterisk symbol "\*" can be used to match the preceding pattern zero or more times. The string "aaabbb" can be found like this:

- a\*b\* = match
- a\*b\*c\* = match



- `.*bbb.*` = match
- `aaa*bbb*` = match

### *Zero times or once*

The question mark "?" makes the preceding pattern optional, so it can match zero times or once. The string "aaabbb" can be found like this:

- `aaa?bbb?` = match
- `aaaa?bbbb?` = match
- `?.?` = match
- `aa?bb?` = no match

### *Minimum to maximum*

Curly brackets "{}" can be used to specify a minimum and also maximum number of times the preceding shortest pattern can be repeated. The allowed forms are:

- `{5}` – the pattern repeats exactly 5 times
- `{2,5}` – the pattern repeats 2 to 5 times
- `{2,}` – the pattern repeats at least twice

For string "aaabbb", the following applies:

- `a{3}b{3}` = match
- `a{2,4}b{2,4}` = match
- `a{2,}b{2,}` = match
- `{3}{3}` = match
- `a{4}b{4}` = no match
- `a{4,6}b{4,6}` = no match
- `a{4,}b{4,}` = no match

## Grouping

By using parentheses "()", it is possible to form sub-patterns. The quantity operators listed above operate on the shortest previous pattern, which can also be a group. For string "ababab", the following applies:

- $(ab)^+$  = match
- $ab(ab)^+$  = match
- $(\cdot)^+$  = match
- $(\dots)^+$  = no match
- $(ab)^*$  = match
- $abab(ab)?$  = match
- $ab(ab)?$  = no match
- $(ab)\{3\}$  = match
- $(ab)\{1,2\}$  = no match

## Alternation

The pipe symbol "|" works the same as the OR operator mentioned above in this section. The match will be successful if the pattern on either the left side OR the right side matches. Alternation applies to the longest pattern. For string "aabb", the following applies:

- $aabb|bbaa$  = match
- $aacc|bb$  = no match
- $aa(cc|bb)$  = match
- $a+|b+$  = no match
- $a+b+|b+a+$  = match
- $a+(b|c)^+$  = match

## Character classes

Ranges of characters may be specified as character classes, by being enclosed in square brackets "[]". A



leading ^ symbol negates the character class. The following forms are allowed:

- [abc] = 'a' or 'b' or 'c'
- [a-c] = 'a' or 'b' or 'c'
- [-abc] = '-' or 'a' or 'b' or 'c'
- [abc\\_] = '-' or 'a' or 'b' or 'c'
- [^abc] = any character except 'a' or 'b' or 'c'
- [^a-c] = any character except 'a' or 'b' or 'c'
- [^-abc] = any character except '-' or 'a' or 'b' or 'c'
- [^abc\\_] = any character except '-' or 'a' or 'b' or 'c'

**Note:** The dash “-” indicates a range of characters, except when it is the first character or when it is escaped with a backslash.

For string "abcd", the following applies:

- ab[cd]+ = match
- [a-d]+ = match
- [^a-d]+ = no match

## Optional operators

### *Complement*

Complement is probably the most used and helpful option. The shortest pattern that comes after a tilde symbol "~" is negated. For example, `ab~cd` means:

- Starts with a
- a is followed by b
- b is followed by a string of any length that is anything, except c
- Ends with d





For the string "abcdef", the following applies:

- `ab~df` = match
- `ab~cf` = match
- `ab~cdef` = no match
- `a~(cb)def` = match
- `a~(bc)def` = no match

### *Interval*

The interval option enables the use of numeric ranges. The ranges have to be always enclosed by angle brackets "<>". For string "access90", the following applies:

- `access<1-100>` = match
- `access<01-100>` = match
- `access<001-100>` = no match

### *Intersection*

The ampersand symbol "&" joins two patterns. They both of them have to match the string. For string "aaabbb", the following applies:

- `aaa.+&.+bbb` = match
- `aaa&bbb` = no match

### *Any string*

The at sign "@" matches any string in its entire length. This can be combined with intersection and complement (mentioned above) in cases when you want to search for "everything except something". For example:



- `@&~(content.+)` finds everything, except strings beginning with "content"

## Properties in different archives

When specifying a boolean value for a property in query, the following notations can be used:

- `true | yes | y` stand for True
- `false | no | n` stand for False

Property names and values are not case sensitive. Wildcard characters (\* and ?) can be used everywhere.

The character '|' means an option or alternative (in cases if multiple property names and values can be used).

If the value is specified in quotes (e.g. "value"), it is considered as a phrase. Example:

- "brown fox" will find all documents that contains the words "brown" followed by word "fox"

## Email properties

The properties below are applicable when searching in Email archive

Property	Specificity	Description
<b>Title   Subject:</b>	(string)	condition on email subject
<b>Sender   From:</b>	(string)	condition on email's owner
<b>To:</b>	(string)	condition on email's recipient
<b>Folder:</b>	(string)	condition on folder path; possible to find emails only in the specified folder (backslash is used as path separator, e.g. Inbox\important)



<b>HasAttachment:</b>	true   false	if true, finds emails having one or more attachments; if false, finds emails having no attachments
<b>Body:</b>	(string)	search in the mail's body text
<b>Attachment:</b>	(string)	search in mail's attachment text
<b>Message class:</b>	(string)	condition on the type of email item (IPM.note – email, IPM.appointment – calendar item, etc.) The user can get this information directly from the mailbox (in Outlook) or the database.
<b>Internet message ID:</b>	(string)	search with the email's internet message ID. The use can get this information from the database.
<b>Date   SentDate:</b>	(date)	condition on email's sent date
<b>ReceivedDate:</b>	(date)	condition on receiving date
<b>Cc:</b>	(string)	condition on addresses in CC tag of the email
<b>Bcc:</b>	(string)	condition on addresses in BCC tag of the email
<b>Importance:</b>	Low   Normal   High	finds emails with the specified importance level
<b>Sensitivity:</b>	Normal   Personal   Private   Confidential	finds emails with the specified sensitivity level



<b>Size:</b>	(number)	condition on email's size in bytes
<b>Category:</b>	(string)	condition on category
<b>Flag:</b>	true   false	find emails having a flag set (true) or not set (false)
<b>Is In-Place Archive:</b>	true   false	finds emails from In-Place Archive (true) or emails not from the In-Place Archive (false)
<b>Inactive:</b>	true   false	find inactive emails (true) or active emails (false)
<b>Retention:</b>	(number)	condition on retention time (in months)

### File properties

The properties below are applicable when searching in File archive

Property	Specificity	Description
<b>CreationDate:</b>	(date)	condition on file's creation date
<b>Date   ModifiedDate:</b>	(date)	condition on file's modification date
<b>Folder:</b>	(string)	condition on file's path ( is the path separator as in Windows, e.g.



		c:documentsrfa)
<b>Title   Filename:</b>	(string)	condition on file's name
<b>Size:</b>	(number)	condition on file's size in bytes
<b>Inactive:</b>	true   false	find inactive files (true) or active files (false)

### GDPR Application

The properties below are applicable when searching in GDPR Application

Property	Specificity	Description
<b>Title:</b>	(string)	condition on file's name
<b>DataSource:</b>	(string)	condition on item's source (Emails, FSItems, etc.)

### GDPR Exchange

The properties below are applicable when searching in GDPR Exchange

Property	Specificity	Description
<b>Title   Subject:</b>	(string)	condition on email subject
<b>Sender   From:</b>	(string)	condition on email's owner
<b>To:</b>	(string)	condition on email's recipient



<b>Folder:</b>	(string)	condition on folder path; possible to find emails only in the specified folder (backslash is used as path separator, e.g. Inbox, Important)
<b>HasAttachment:</b>	true   false	if true, finds emails having one or more attachments; if false, finds emails having no attachments
<b>Body:</b>	(string)	search in the mail's body text
<b>Attachment:</b>	(string)	search in mail's attachment text
<b>Message class:</b>	(string)	condition on the type of email item (IPM.note – email, IPM.appointment – calendar item, etc.) The user can get this information directly from the mailbox (in Outlook) or the database.
<b>Internet message ID:</b>	(string)	search with the email's internet message ID. The user can get this information from the database.
<b>Date   SentDate:</b>	(date)	condition on email's sent date
<b>ReceivedDate:</b>	(date)	condition on receiving date
<b>Cc:</b>	(string)	condition on addresses in CC tag of the email
<b>Bcc:</b>	(string)	condition on addresses in BCC tag of the email

<b>Importance:</b>	Low   Normal   High	finds emails with the specified importance level
<b>Sensitivity:</b>	Normal   Personal   Private   Confidential	finds emails with the specified sensitivity level
<b>Size:</b>	(number)	condition on email's size in bytes
<b>Category:</b>	(string)	condition on category
<b>Flag:</b>	true   false	find emails having a flag set (true) or not set (false)

### GDPR File system

The properties below are applicable when searching in GDPR File system

Property	Specificity	Description
<b>CreationDate:</b>	(date)	condition on file's creation date
<b>Date   ModifiedDate:</b>	(date)	condition on file's modification date
<b>Folder:</b>	(string)	condition on file's path (is the path separator as in Windows, e.g. c:documentsrfa)
<b>Title   Filename:</b>	(string)	condition on file's name
<b>Size:</b>	(number)	condition on file's size in



		bytes
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**OneDrive document properties**

The properties below are applicable when searching in OneDrive archive

Property	Specificity	Description
<b>Name:</b>	(string)	condition on document name
<b>Title:</b>	(string)	condition on document title
<b>CreationDate:</b>	(date)	condition on creation date
<b>Date   ModifiedDate:</b>	(date)	condition on modification date
<b>ModifiedBy:</b>	(string)	condition on user who modified the document
<b>CreatedBy:</b>	(string)	condition on user who created the file
<b>Size:</b>	(number)	condition on file size
<b>URL:</b>	(number)	condition on document's URL
<b>lactive:</b>	true   false	find inactive files (true) or active files (false)
<b>Attachment:</b>	(number)	search in file's attachment text or title



### SharePoint document properties

The properties below are applicable when searching in SharePoint archive

Property	Specificity	Description
<b>Name:</b>	(string)	condition on document name
<b>Title:</b>	(string)	condition on document title
<b>CreationDate:</b>	(date)	condition on creation date
<b>Date   ModifiedDate:</b>	(date)	condition on modification date
<b>ModifiedBy:</b>	(string)	condition on user who modified the document
<b>CreatedBy:</b>	(string)	condition on user who created the file
<b>Size:</b>	(number)	condition on file size
<b>URL:</b>	(number)	condition on document's URL
<b>lactive:</b>	true   false	find inactive files (true) or active files (false)



<b>Attachment:</b>	(number)	search in file's attachment text or title
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### Sharing

The properties below are applicable when searching in Sharing

Property	Specificity	Description
<b>Download limit:</b>	(string)	the download limit of the shared files
<b>Expiration date:</b>	(date)	shared item's expiration date
<b>FileName:</b>	(string)	title of the shared document
<b>Recipient:</b>	(string)	condition on shared item's recipient
<b>Sharedby:</b>	(string)	name of the user who shared the item
<b>SharedOn:</b>	(date)	the date when an item was shared
<b>Status:</b>	(string)	type of the status; possible values are: Active, Suspended, and Expired (not able to search for the Unavailable status)

### Teams archive properties



The properties below are applicable when searching in Teams archive

Property	Specificity	Description
<b>Title:</b>	(string)	message title
<b>Date   CreationDate:</b>	(date)	message's sent date
<b>Author   Sender:</b>	(string)	the user who sent the message
<b>Channel   ChannelName:</b>	(string)	the Teams Channel the message was sent to
<b>Folder   Location   Path   Url:</b>	(string)	specifies the channel name or attachment location (SharePoint document URL)
<b>Mentioned:</b>	(string)	name of the mentioned user
<b>Reacted:</b>	(string)	name of the user who sent a reaction
<b>ReactedOn:</b>	(date)	the date when a reaction was sent
<b>Reaction:</b>	(string)	type of the reaction; possible values are: Like, Angry, Sad, Laugh, Heart, Surprised
<b>Attachment:</b>	(string)	attachment name and content



<b>HasAttachment:</b>	(boolean)	message has attachment or not
<b>Type:</b>	(string)	the type of the item, possible values are: Message (normal chat message), Reply (reply on a message), File (attachment file or file on Teams-related SharePoint sites)
<b>URL:</b>	(string)	condition on document's URL (SharePoint document URL)
<b>Body:</b>	(string)	search in the message's body text
<b>Inactive:</b>	true   false	find inactive messages (true) or active messages (false)
<b>Size:</b>	(number)	message size, including attachments
<b>FileName:</b>	(string)	attachment name
<b>Subject:</b>	(string)	subject of the email message posted to a channel

### **Teams chat archive properties**

The properties below are applicable when searching in Teams chat archive



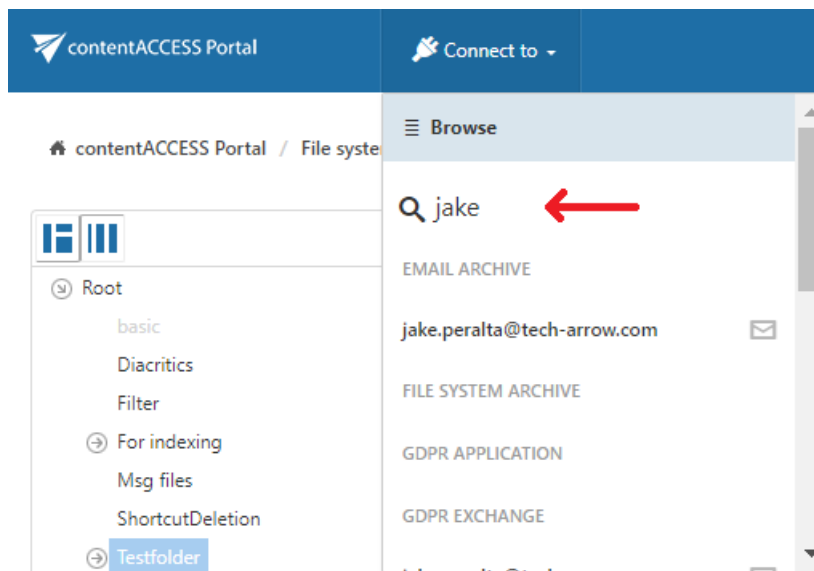
Property	Specificity	Description
<b>Title:</b>	(string)	message title
<b>Date   CreationDate:</b>	(date)	message's sent date
<b>Author   Sender:</b>	(string)	the user who sent the message
<b>Mentioned:</b>	(string)	name of the mentioned user
<b>Reacted:</b>	(string)	name of the user who sent a reaction
<b>ReactedOn:</b>	(date)	the date when a reaction was sent
<b>Reaction:</b>	(string)	type of the reaction; possible values are: Like, Angry, Sad, Laugh, Heart, Surprised
<b>Attachment:</b>	(string)	attachment name and content
<b>HasAttachment:</b>	(boolean)	message has attachment or not
<b>Folder   Category:</b>	(string)	specifies the message category, valid values: Chats, Group chats or Meetings
<b>Body:</b>	(string)	search in the message's body text
<b>Inactive:</b>	true   false	find inactive messages (true) or



		active messages (false)
<b>Size:</b>	(number)	message size, including attachments
<b>FileName:</b>	(string)	attachment name
<b>Member:</b>	(string)	name of the user who is member of a chat
<b>Topic:</b>	(string)	topic of a meeting

### “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

**Note:** For more information about the search query languages, please refer to [this](#) section.



The quick search function of contentACCESS Portal enables searching only in current folder (the folder that is selected in the left navigation pane in the tree view) and its subfolders. Quick search supports only text-based fields (e.g. Title, Subject). Connect to an archive (select one from the "Connect to" menu) and navigate to the folder of your choice. Then type the searched phrase into the search box located above the list view and by clicking on the icon next to the search box, choose if you want to search in:

- Current folder
- Current folder and subfolders (recursively, including all subfolders)
- Subfolders only (recursively)

The behavior of the quick search criteria can be customized in the UI settings. The customization is described in chapter [Editing Quick, Basic and Advanced search criteria](#) of this guide later on.

The screenshot shows the contentACCESS Portal interface. The search bar at the top contains 'send'. The search results are displayed in a table with columns: From, Subject, Date, To, and Size. The selected email is 'TEA send as ZIP from Properties RETEST'.

From	Subject	Date	To	Size
jake.peralta@tech-arrow.com	TEA send as ZIP from Properties RETEST	2022.02.03. 16:54:40	sandra.bullock@tech-arrow.com	1 MB
jake.peralta@tech-arrow.com	ODE - send as ZIP	2022.02.03. 14:01:08	sandra.bullock@tech-arrow.com	2.8 MB
jake.peralta@tech-arrow.com	ODE - send as attachment	2022.02.03. 13:59:43	sandra.bullock@tech-arrow.com	76 KB
jake.peralta@tech-arrow.com	TEA send as zip - from properties	2022.02.03. 08:07:32	sandra.bullock@tech-arrow.com	428 KB
jake.peralta@tech-arrow.com	TEA send as attachment from properties	2022.02.03. 08:02:17	sandra.bullock@tech-arrow.com	376 KB
jake.peralta@tech-arrow.com	TEA send as ZIP - single item	2022.02.03. 07:38:03	sandra.bullock@tech-arrow.com	608 KB
jake.peralta@tech-arrow.com	TEA send as attachment - single item	2022.02.03. 07:37:47	sandra.bullock@tech-arrow.com	92 KB
jake.peralta@tech-arrow.com	TEA send as attachment - multiple items	2022.02.03. 07:34:29	sandra.bullock@tech-arrow.com	216 KB
jake.peralta@tech-arrow.com	TEA send as ZIP - single item	2022.02.02. 21:29:03	sandra.bullock@tech-arrow.com	140 KB
jake.peralta@tech-arrow.com	SPA send as attachment - single item	2022.02.02. 21:18:37	sandra.bullock@tech-arrow.com	3.7 MB
jake.peralta@tech-arrow.com	SPA send as zip - multiple items	2022.02.02. 21:13:52	sandra.bullock@tech-arrow.com	3.9 MB
jake.peralta@tech-arrow.com	SPA send as attachment - multiple items	2022.02.02. 21:12:05	sandra.bullock@tech-arrow.com	3.1 MB
jake.peralta@tech-arrow.com	FSA copy - paste	2022.02.02. 19:37:53	sandra.bullock@tech-arrow.com	918 KB
jake.peralta@tech-arrow.com	FSA send as zip - multiple items	2022.02.02. 19:25:25	sandra.bullock@tech-arrow.com	992 KB
jake.peralta@tech-arrow.com	FSA send as attachment - multiple items	2022.02.02. 19:24:09	sandra.bullock@tech-arrow.com	536 KB
jake.peralta@tech-arrow.com	FSA send as zip - single item	2022.02.02. 19:21:18	sandra.bullock@tech-arrow.com	1.5 MB
jake.peralta@tech-arrow.com	FSA send as attachment - single item	2022.02.02. 19:21:14	sandra.bullock@tech-arrow.com	112 KB
jake.peralta@tech-arrow.com	EA send as zip - single item	2022.02.02. 13:47:05	sandra.bullock@tech-arrow.com	12.2 MB
jake.peralta@tech-arrow.com	EA send as zip - multiple items	2022.02.02. 13:20:49	sandra.bullock@tech-arrow.com	1.4 MB
jake.peralta@tech-arrow.com	EA send as attachment - multiple items	2022.02.02. 13:16:26	sandra.bullock@tech-arrow.com	948 KB
jake.peralta@tech-arrow.com	EA send as attachment - single item	2021.05.10. 16:07:11	szilvia.kelemen@tech-arrow.com	18 MB

The selected email details are shown on the right:

**TEA send as ZIP from Properties RETEST**

From: jake.peralta@tech-arrow.com  
 Date: 2022.02.03. 16:54:40  
 To: sandra.bullock@tech-arrow.com  
 Expiration date: 2023.02.15.

Message: 35 California fires August Complex CA 902,463 acres burned 8.zip (1 KB)

This email is shared. Show details

### Searching for emails containing the word 'send'

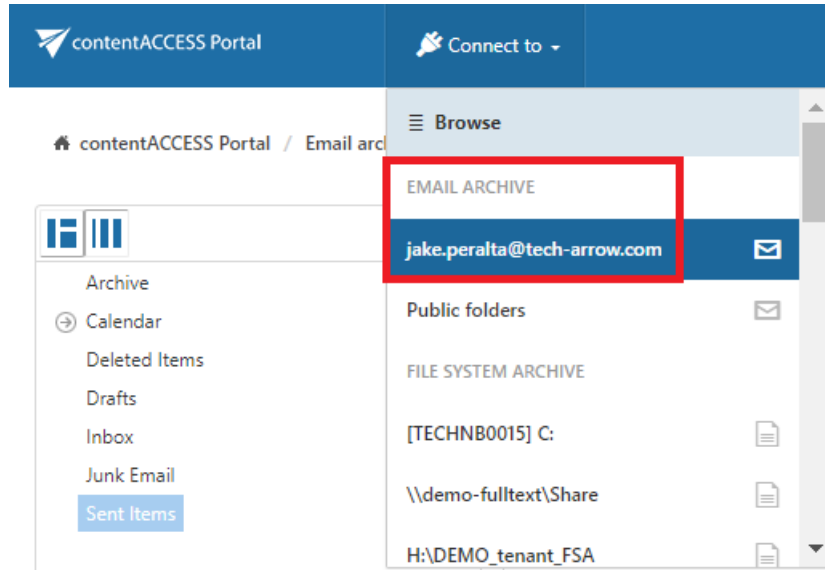
**Search criteria:** Selected archive: jake.peralta@tech-arrow.com

**Archive folder:** Sent items

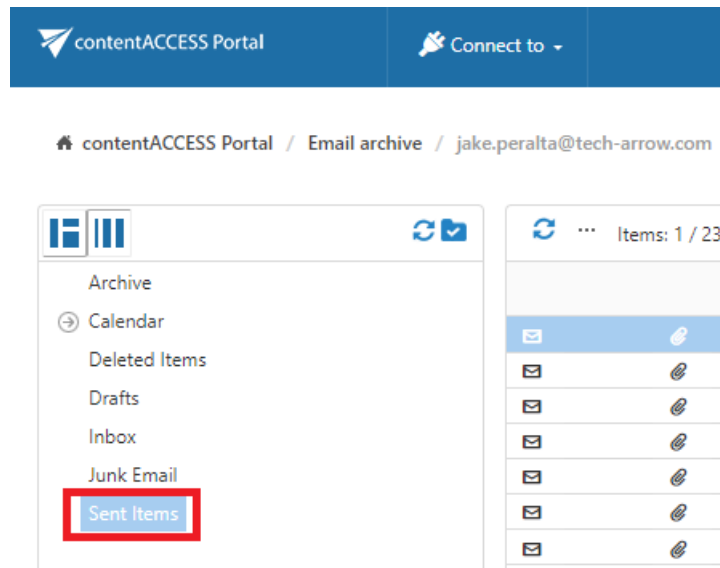
**Search in:** Current folder

**Title:** contains phrase "send".

In this use case we will search for emails in folder **Sent items** on the [jake.peralta@tech-arrow.com](mailto:jake.peralta@tech-arrow.com) archive. We connect to the archive ([jake.peralta@tech-arrow.com](mailto:jake.peralta@tech-arrow.com)) in the **Connect to** list first.

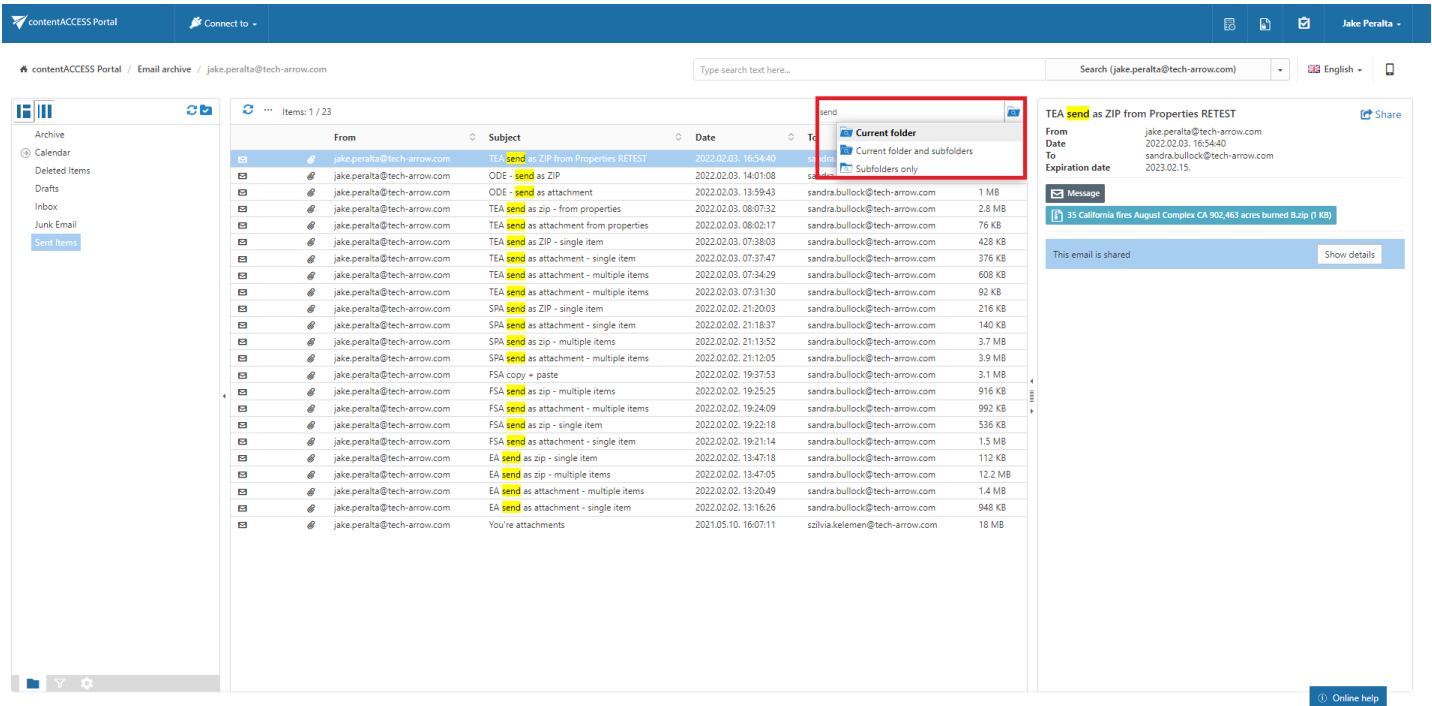


Further we select the given folder (*Sent items*) in the navigation pane:



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





**Note:** If **Enable hit highlighting** is turned on in [Central Administration](#), the located words will be highlighted with a yellow color like on the screenshot below.

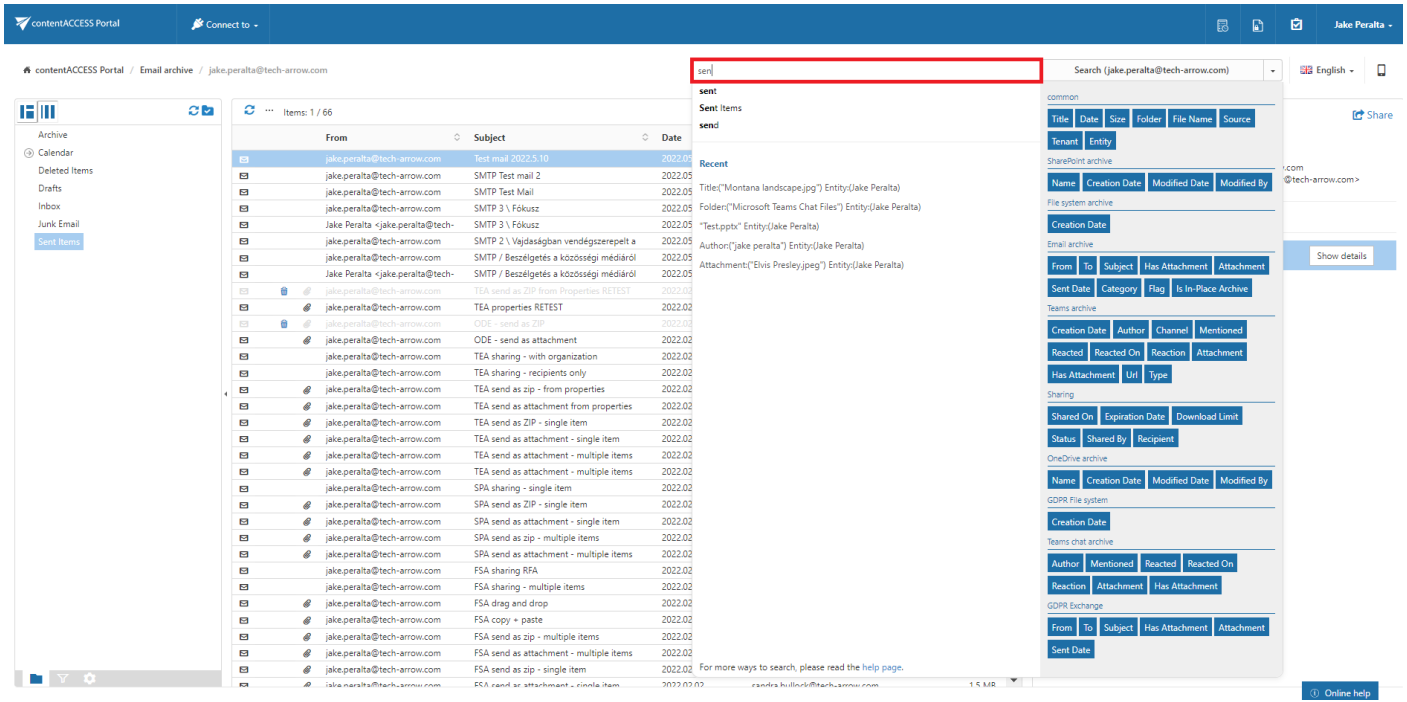
The screenshot shows an email list with a search filter 'Active only' and the search term 'build'. The subject lines of several emails are highlighted in yellow, indicating that the word 'Build' was found within the email content. The highlighted subjects are: '[Build succeeded] contentACCESS - contentACCESS:develop - cont...', '[Build succeeded] officeGATE Dev - officeGATE:develop - contentA...', '[Build succeeded] contentACCESS - contentACCESS:develop - cont...', '[Build failed] contentACCESS - contentACCESS:develop - contentA...', '[Build succeeded] contentACCESS - contentACCESS:develop - cont...', '[Build succeeded] contentACCESS - contentACCESS:develop - cont...', and '[Build succeeded] contentACCESS - contentACCESS:develop - cont...'.

## Fulltext search

**Note:** For more information about the search query language, please read [this](#) section.

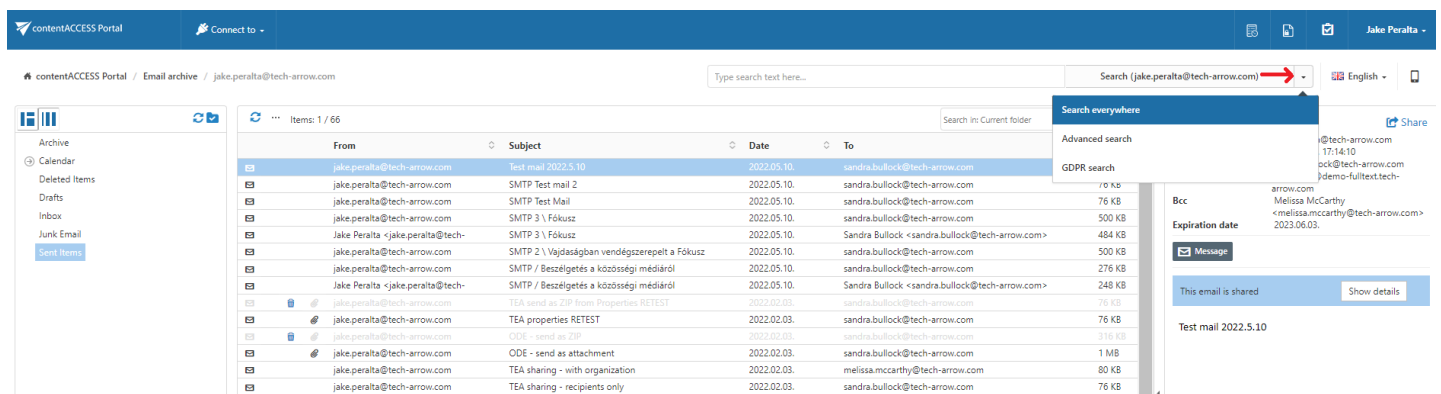
The fulltext search allows the user to search in the entity, which he selected in the Connect to dropdown list – archived mailbox, File archive root, SharePoint archive root site or archived Teams and Teams chats.

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 Enable search suggestions option is turned on in [System](#) settings, the system will suggest words to search for when the user starts typing.



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

**Note:** When searching in multiple archives, the sorting of results may be a bit “out of order”. The reason is that the search engine is **not able** to merge and sort data coming from multiple sources(archives) and sorts results from every archive separately.



If the user does a search using **Search everywhere** and there are models which support **Fulltext search** and also those which don't, a result mode selector will be visible. If the user selects **Fulltext**, it will search only in models which support **Fulltext search**. If the user selects **Classic**, it will search in models which support other types of search, except fulltext. For more information about this setting, read [this](#) section of the manual.

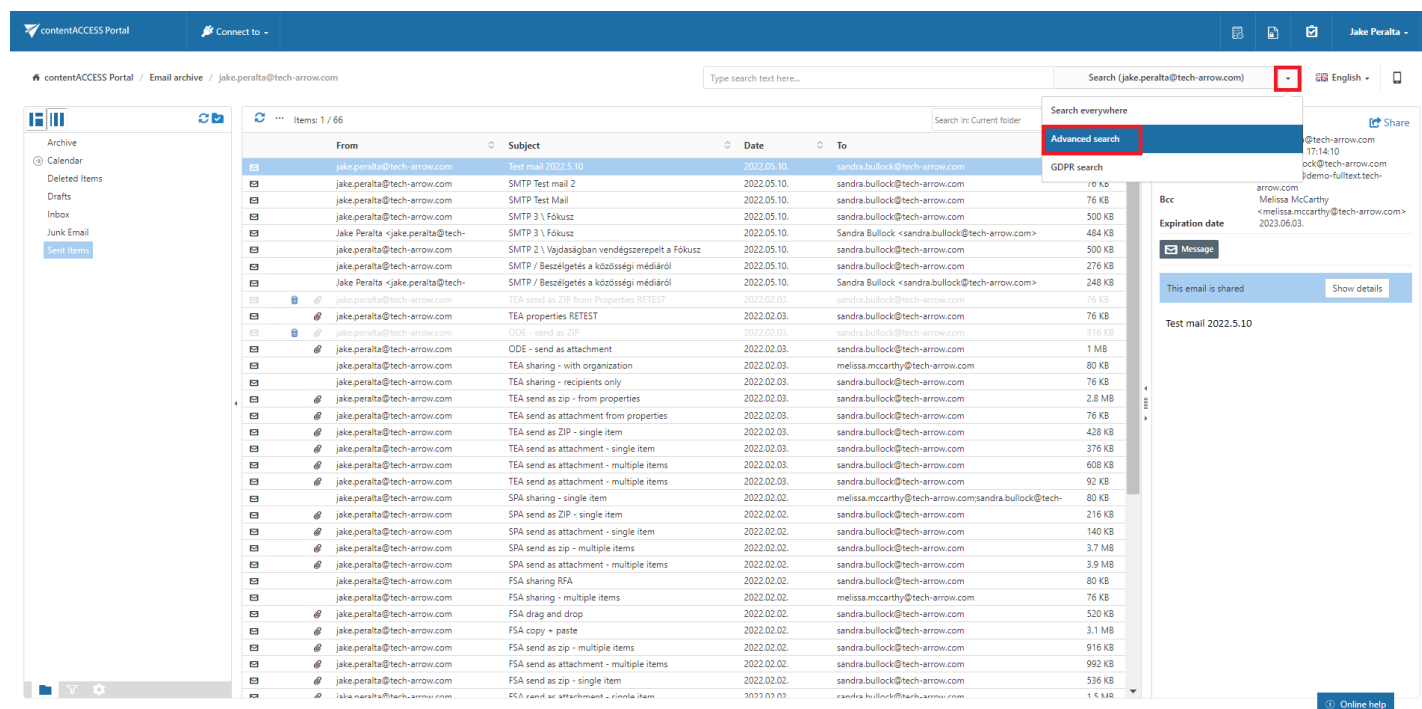
**Note:** If **Enable hit highlighting** is turned on in [Central administration](#), the located words will be highlighted with a yellow color.

## 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.

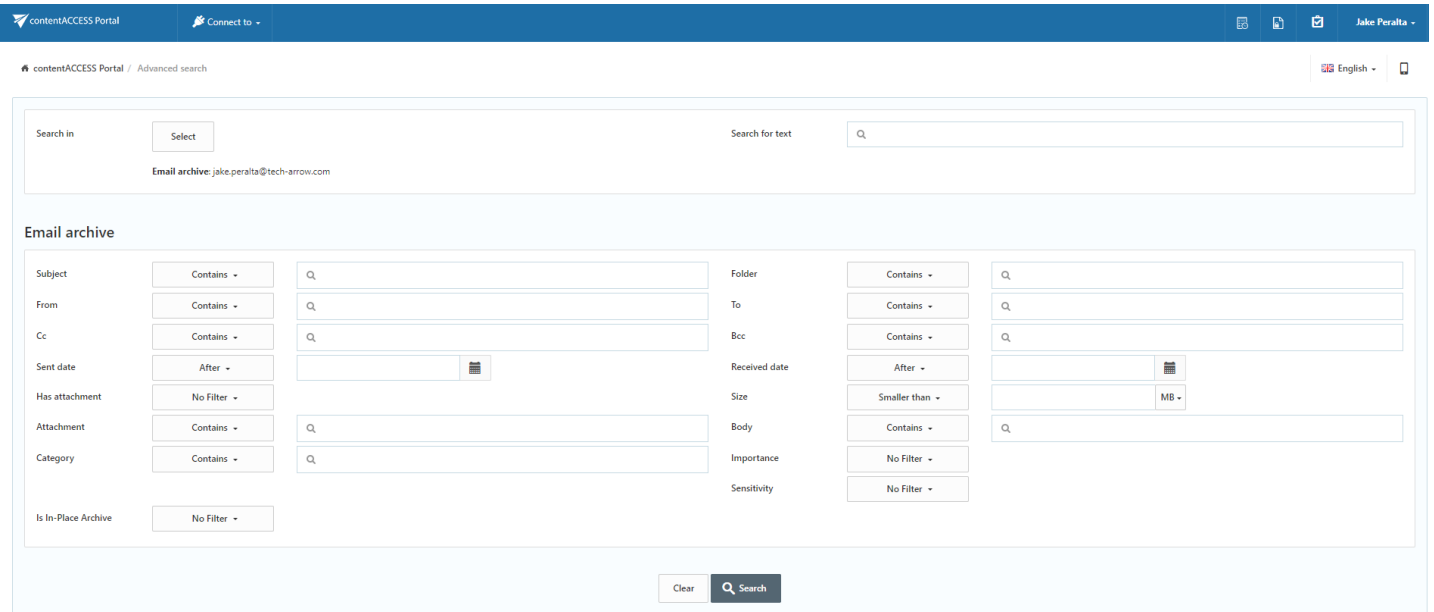
**Note:** When searching in multiple archives, the sorting of results may be a bit “out of order”. The reason is that the search engine is **not able** to merge and sort data coming from multiple sources(archives) and sorts results from every archive separately.

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.

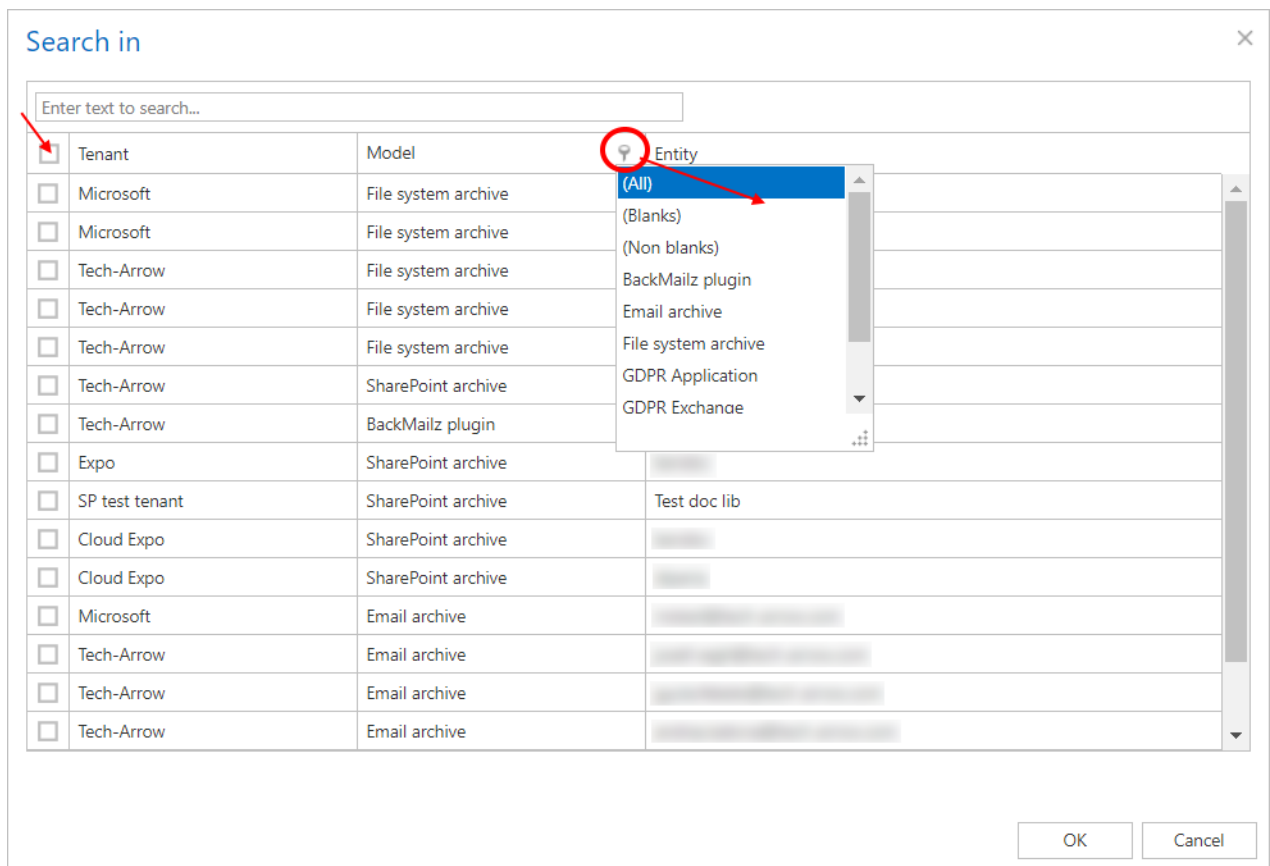


The screenshot shows the contentACCESS Portal interface. At the top, there is a navigation bar with 'contentACCESS Portal', 'Connect to -', and a user profile 'Jake Peralta'. Below this, the breadcrumb path is 'contentACCESS Portal / Email archive / jake.peralta@tech-arrow.com'. A search bar is present with the text 'Type search text here...'. To the right of the search bar, there is a dropdown menu for search options, with 'Advanced search' highlighted in red. The main content area displays a list of search results with columns for 'From', 'Subject', 'Date', and 'To'. The right sidebar shows details for the selected email, including 'Bcc', 'Expiration date', and a 'Show details' button.

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 **Fulltext**, it will search only in models which support **Fulltext search**. If the user selects **Classic**, it will search in models which support other types of search, except fulltext. For more information about this setting, read [this](#) section of the manual.



To select the desired entity (or entities), click on the **Select** button (upper left part of the screenshot above). Check the checkboxes of the entities you want to perform search in. If you check the **Tenant** checkbox (first one, marked on screenshot), then all entities listed below will be selected. If you click on the icon in the **Model** column (marked on screenshot), you will be able to filter entities by model type.



contentACCESS Portal enables advanced searching based on criteria set in the **UI settings**. For more information refer to the [Editing Quick, Basic and Advanced search criteria](#) subchapter of this guide.

### Searching for an email message containing the phrase “test”

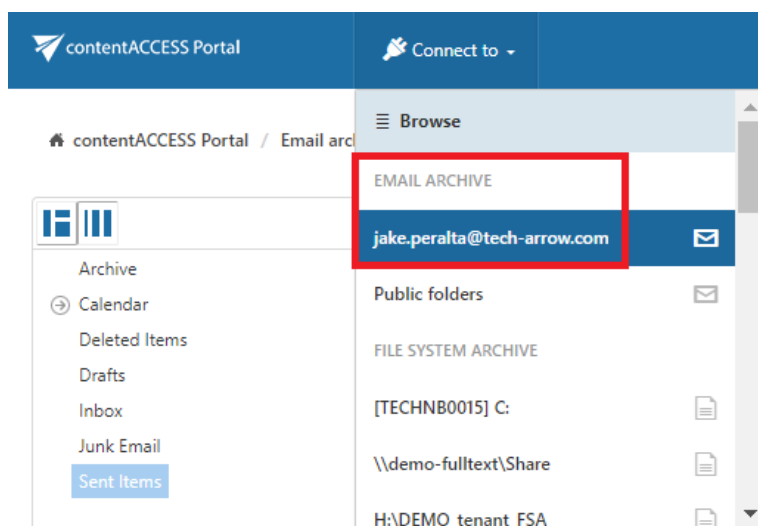
Search criteria:           **Mailbox:** [jake.peralta@tech-arrow.com](mailto:jake.peralta@tech-arrow.com)

**Date range:** 10.02.2022 – 30.03.2022

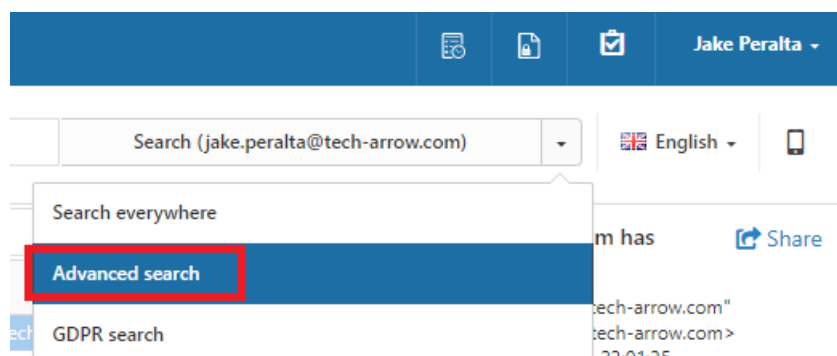
**Subject:** contains phrase “test”.

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 contentACCESS Portal.

To start advanced search, connect to the archive mailbox of [jake.peralta@tech-arrow.com](mailto:jake.peralta@tech-arrow.com) 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



[jake.peralta@tech-arrow.com](mailto:jake.peralta@tech-arrow.com) that we have selected in the **Connect to** list.

- As we are searching for emails with subject containing “test”, we enter this phrase into the **Subject** text box.
- We are searching for emails in date range **10/02/2022 – 30/03/2022**, so we select **Between** from the **Receive Date** dropdown list. Then we specify the desired date range and click on **Search**.

The desired files have been found as displayed on the picture below:

From	Subject	Date	To	Size	Entity
Sandra Bullock <sandra.bullock@tech-arrow.com>	BCC test	2021.03.29, 12:22:14	Jake Peralta <jake.peralta@tech-arrow.com>	316 KB	jake.peralta@tech-arrow.com
Sandra Bullock <sandra.bullock@tech-arrow.com>	BCC test	2021.03.29, 12:21:31	Melissa McCarthy <melissa.mccarthy@tech-arrow.com>	252 KB	jake.peralta@tech-arrow.com

**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.



**Note:** If **Enable hit highlighting** is turned on in [Central administration](#), the located words will be highlighted with a yellow color.

## Periodical search

**GDPR** requires to detect any data leakage and as soon as possible. Thanks to this feature the user won't have to manually search if someone worked with sensitive data, but can instead create and configure a periodical search, which will perform all the necessary actions.

Periodical search is a search performed automatically by the **Task runner** with the recurrence and other parameters configured by the user. The search is performed only on the entities allowed by the user's roles and permissions.

## Permissions

There are 2 periodical search related permissions that can be assigned from [Central Administration](#):

### Role details ✕

Role display name:

#### Permissions

Manage legal hold cases:	<input checked="" type="radio"/> Not allowed	<input type="radio"/> All allowed	?	
View legal hold cases:	<input checked="" type="radio"/> Not allowed	<input type="radio"/> All allowed	?	
<b>PeriodicalSearch</b>				
Create periodical searches:	<input type="radio"/> Not allowed	<input checked="" type="radio"/> All allowed	?	
Manage other user's periodical searches:	<input type="radio"/> Not allowed	<input checked="" type="radio"/> All allowed	?	
<b>Plugin.BackMailz</b>				
Use BackMailz Service:	<input checked="" type="radio"/> Not allowed	<input type="radio"/> All allowed	<input type="radio"/> Specific allowed	?
<b>Plugin.CategorizeToPF</b>				
View mailboxes:	<input checked="" type="radio"/> Not allowed	<input type="radio"/> All allowed	<input type="radio"/> Specific allowed	?
<b>Plugin.Datengut</b>				
View Datengut DDCs:	<input checked="" type="radio"/> Not allowed	<input type="radio"/> All allowed		?
<b>Plugin.EmailArchive</b>				

Select a tenant, where the role will be available

Tenant:

- 1) **Create periodical search** – allows to define a periodical search and manage (view, delete) own periodical searches
- 2) **Manage other's periodical searches** - The Manage other's periodical searches permission allows to see other user's periodical searches – on tenant or system level – based on role assignment. With this permission, the user cannot create a periodical search. He can only see, enable/disable and delete the periodical searches on the tenant(s) where he has permissions. If the user had the Create periodical search permission before, but the permission was removed, he will be still able to see his own periodical searches.

## Using periodical search





First, the user must perform a search in contentACCESS Portal. The same parameters that were entered here will be later used by the periodical search.

The screenshot shows the contentACCESS Portal interface. At the top, there is a search bar with the query "Subject(test\*) ReceivedDate(2021-02-10, 2021-03-30)". Below the search bar, a table displays search results:

Subject	Date	To	Size	Entity	
tech-arrow.com >	BCC test	2021.03.29. 12:22:14	Jake Peralta <jake.peralta@tech-arrow.com>	316 KB	jake.peralta@tech-arrow.com
tech-arrow.com >	BCC test	2021.03.29. 12:21:31	Melissa McCarthy <melissa.mccarthy@tech-arrow.com>	252 KB	jake.peralta@tech-arrow.com

A context menu is open over the first row, with the option "Create periodical search" highlighted in red. The right side of the interface shows an email preview for "BCC test2" from Sandra Bullock, dated 2021.03.29. 12:22:14. The email content includes a headline in Hungarian: "Műanyag hulladék veszélyezteti a Fekete-tenger élővilágát" and a sub-headline: "A műanyagszemét jelentette veszélyre hívták fel a figyelmet orosz környezetvédők, miután több száz elhullott madarat találtak a Fekete-tenger keleti partvidékén."

Click on the periodical search button. A pop-up window will open. Here you can set the following:

- Search name – name of the periodical search
- Notification recipients (split by “;”) – email addresses of users that will receive the notification email (this email will be sent by the notification job)
- Tenant – Tenant that the search will be performed on (only tenants available for the user are listed in the dropdown list)
- Keep results – number of search results that will be stored in the database (explained below)
- Recurrence (weekly on selected day(s) at selected time or monthly on selected day(s) at selected time)
- Description – description of the periodical search



### Create periodical search



Search name:

Notification recipients:

Keep results:

Recurrence:

Sunday
  Monday
  Tuesday
  Wednesday
  Thursday
  Friday
  Saturday

At:

Description:

The list of all available periodical searches can be viewed by clicking on the Periodical search button in the upper right corner.



The following actions are available:

Name	Last execution duration	Recurrence	Next run	Keep in history	Notification recipients	Enabled	Action
PeriodicalSearch Test	47 seconds	Running weekly on Monday at 12:...	7/4/2022 1:45:00 PM	15	sandra.bullock@tech-arrow.com	Yes	
Sharing Periodical search	1 second	Running weekly on Saturday at 8:...	7/2/2022 9:00:00 AM	10	sandra.bullock@tech-arrow.com	Yes	
Sharing search 2022.01.31	1 second	Running weekly on Monday,Tues...	7/4/2022 2:15:00 PM	10	sandra.bullock@tech-arrow.com	Yes	
Test	-	Running weekly on Sunday,Friday ...	7/1/2022 8:00:00 PM	10	jake.peralta@tech-arrow.com	Yes	

- 1) Refresh – refreshes the list of periodical searches
- 2) View details – explained below
- 3) Edit – explained below
- 4) Enable/disable – with this button it is possible to enable or disable the selected periodical search (when disabled, it won't perform any actions; disabled searches have grey background)
- 5) Delete – deletes the periodical search

### View details



On this page it is possible to see the details about the selected periodical search. The **Query** displays all searching parameters of the periodical search (the search this periodical search was created from). By clicking on the link, the defined search will be performed again in a moment.

The previous search result summary is displayed in the grid below. We can see the start date, end date, duration and total hit count. It is also possible to download the report file from here by clicking on the button in the **Actions** column. The report file contains a detailed summary with the list of emails, files and database records, where the results are coming from.

contentACCESS Portal / Periodical search / PeriodicalSearch Test

English

**PeriodicalSearch Test**

Description: Test Query: all in everywhere

Next run: 7/4/2022 1:45:00 PM

Recurrence: Running weekly on Monday at 12:45 PM

Keep in history: 15

Recipients: sandra.bullock@tech-arrow.com

Created by: Sandra Bullock

Edit

Previous search results

Start date	End date	Duration	Hit count	Actions
6/6/2022 1:45:26 PM	6/6/2022 1:46:15 PM	49 seconds	2807	↓
6/27/2022 1:45:29 PM	6/27/2022 1:46:17 PM	47 seconds	2863	↓
6/20/2022 1:45:21 PM	6/20/2022 1:46:00 PM	39 seconds	2855	↓
6/13/2022 1:45:25 PM	6/13/2022 1:46:12 PM	47 seconds	2854	↓
5/9/2022 1:45:18 PM	5/9/2022 1:45:18 PM	1 second	0	↓
5/30/2022 1:45:17 PM	5/30/2022 1:46:06 PM	48 seconds	2804	↓
5/23/2022 1:45:23 PM	5/23/2022 1:46:11 PM	48 seconds	2804	↓
5/12/2022 1:45:20 PM	5/12/2022 1:46:08 PM	48 seconds	2815	↓
5/16/2022 1:46:00 PM	5/16/2022 1:46:56 PM	56 seconds	2807	↓
4/4/2022 1:45:25 PM	4/4/2022 1:46:13 PM	47 seconds	2816	↓
4/25/2022 1:45:24 PM	4/25/2022 1:46:18 PM	53 seconds	2826	↓
4/18/2022 1:45:28 PM	4/18/2022 1:46:19 PM	49 seconds	2832	↓
4/11/2022 1:45:22 PM	4/11/2022 1:46:03 PM	41 seconds	2845	↓
3/28/2022 1:45:27 PM	3/28/2022 1:46:17 PM	50 seconds	2881	↓
3/21/2022 12:45:18 PM	3/21/2022 12:46:05 PM	47 seconds	2859	↓

## Edit

Here it is possible to set/change the same parameters as after clicking on the **Periodical search** button after performing a search.

**Edit periodical search** ×

Search name:

Notification recipients:

Keep results:

Recurrence:

Sunday
  Monday
  Tuesday
  Wednesday
  Thursday
  Friday
  Saturday

At:

Description:



## History management

Every periodical search has a defined “**Keep in history**” property (same value as **Keep records** when creating the periodical search) – this means that we store X previous search results in the database and also in the corresponding report file on the resource storage.

## Task runner processing

### When a periodical search is found

- We check the **IsActive** status – if the search is not active, it means that it was marked as deleted.
- If the search is marked as deleted, we will remove the corresponding history items, report files and also the definition/configuration of the periodical search.
- If a periodical search is disabled, it will be skipped by the **Task runner**.
- If the search is active, its scheduled time is recalculated based on recurrence – the next job will not process it. (It means that if it is scheduled to run at 10:00 on every Wednesday, it will be processed at that time and set to run on the next Wednesday at 10:00, on the other days and times the search can't be found).
- Task runner job will create a report in the resource storage, a new record in the history table and will add a reporting email into the notification job's queue – history management is performed during this processing.
- The report file is available only from contentACCESS Portal. The notification email contains a link to the periodical search detail page, which contains the stored history results – therefore it is easy to compare the results from there, and this way we can easily ensure that the report is not available for a user without permissions.
- If the user would like to share the report with another user, he needs to save the report file and send it to the user. He can use our sharing app for this.

## GDPR search

The general data protection regulation, or as most people know it **GDPR**, brought new rules about data storage and regulation. Having a proper overview about all company and personal data – where it is stored, for how long, who is accessing it, may seem like a hard task now. That's

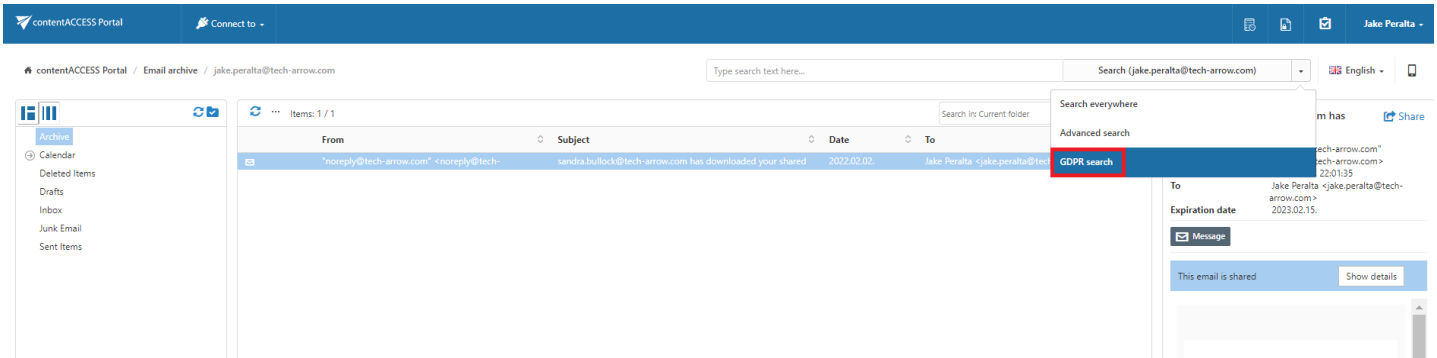


why we programmed our **GDPR search**, so it would be much easier and faster for our customers to find all personal data they need. The predefined search patterns allow the user to search for the most common, sought, requested and necessary data in a very user-friendly way.

Does your customer want you to find and delete his personal data? Or you just want to check where a credit card number was mentioned? No problem!

To get to the **GDPR search** page, click on the search type dropdown list and choose the **GDPR search**.

**Note:** When searching in multiple archives, the sorting of results may be a bit “out of order”. The reason is that the search engine is **not able** to merge and sort data coming from multiple sources(archives) and sorts results from every archive separately.



On the GDPR search page, it is possible to choose between two tabs – **Search for personal data** and **Search for all sensitive data**. The user can change the predefined search patterns by clicking on the **Change template** button on both tabs, but we don't recommend it. If the patterns were changed, the user can also reset them back to the original state.

Search for personal data

Search for all sensitive data

**SEARCH FOR PERSONAL DATA**

Personal data means any information relating to an identified or identifiable natural person.

Search in

Select

Search everywhere

First name

Last name

ID card

Email

Phone

Country

Street

Zip code

Search

Change template

### Change template



Action

Reset my settings

Update my settings

Current settings

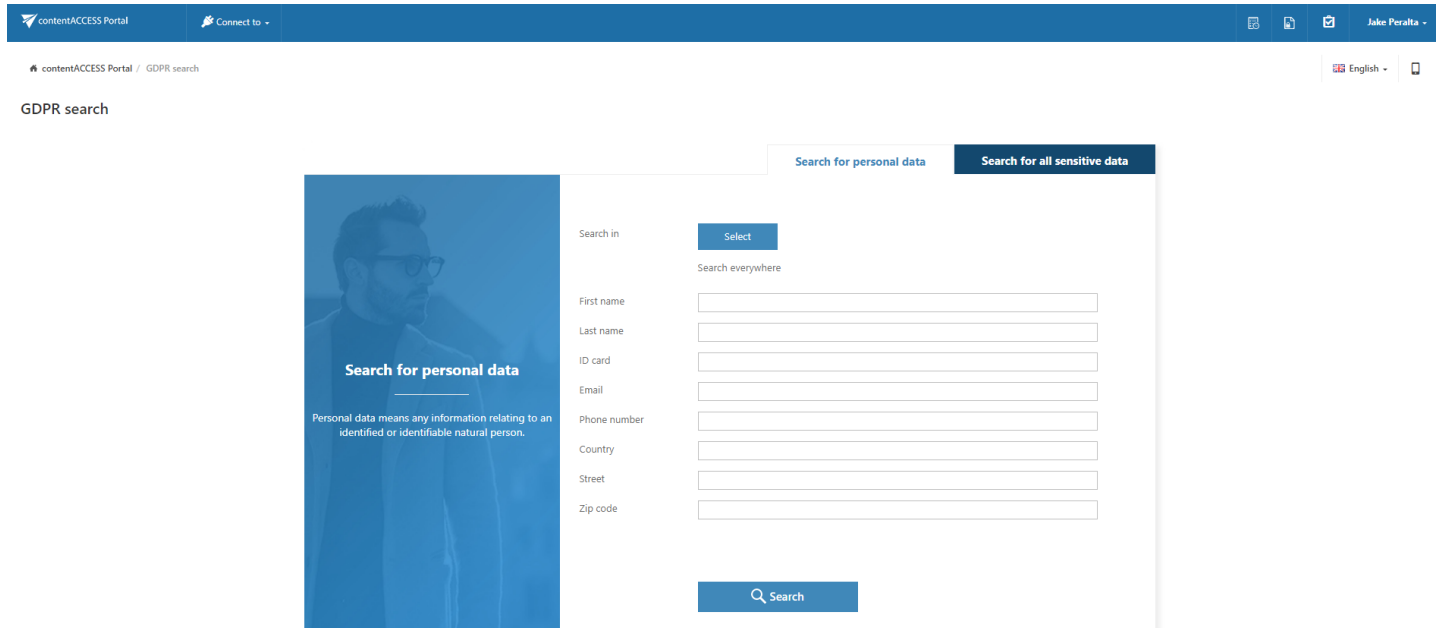
```
<PersonalFieldCollection>
  <InnerList>
    <PersonalField>
      <SpanDistance>1</SpanDistance>
      <SpanCategory>1</SpanCategory>
      <DisplayName>First name</DisplayName>
      <Id>persFirstName</Id>
      <IsSpan>True</IsSpan>
      <IsIdentifier>False</IsIdentifier>
    </PersonalField>
    <PersonalField>
      <SpanDistance>1</SpanDistance>
      <SpanCategory>1</SpanCategory>
      <DisplayName>Last name</DisplayName>
      <Id>persLastName</Id>
      <IsSpan>True</IsSpan>
      <IsIdentifier>False</IsIdentifier>
    </PersonalField>
    <PersonalField>
      <SpanDistance>0</SpanDistance>
      <SpanCategory>0</SpanCategory>
      <DisplayName>ID card</DisplayName>
      <Id>persIdCard</Id>
      <IsSpan>False</IsSpan>
      <IsIdentifier>True</IsIdentifier>
  </InnerList>
</PersonalFieldCollection>
```

OK

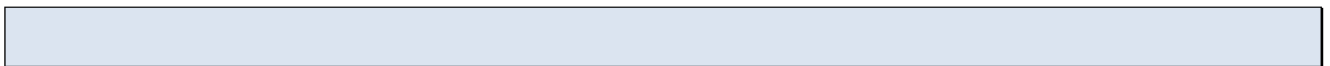
Cancel

## Search for personal data

On this page, the user can search for any information related to an identified person.



By clicking on the **Select** button, the entity selector popup window will open. Here the user may select entities he wants to search in. It is also possible to filter the entities by model type. Select the desired entities and click on **OK**.





Search in

Type search text here...			
<input type="checkbox"/>	Tenant	Model	Entity
<input type="checkbox"/>	Demo	Email archive	jake.peralta@tech-arrow.com
<input type="checkbox"/>	Demo	Email archive	Public folders
<input type="checkbox"/>	Demo	File system archive	[TECHN80015] C:
<input type="checkbox"/>	Demo	File system archive	\\demo-fulltext\Share
<input type="checkbox"/>	Demo	File system archive	H:\DEMO_tenant_FSA
<input type="checkbox"/>	Demo	GDPR Application	Demo_app
<input type="checkbox"/>	Demo	GDPR Application	DEMO_GDPRApplication
<input type="checkbox"/>	Demo	GDPR Exchange	jake.peralta@tech-arrow.com
<input type="checkbox"/>	Demo	GDPR Exchange	melissa.mccarthy@tech-arrow.com
<input type="checkbox"/>	Demo	GDPR Exchange	sandra.bullock@tech-arrow.com
<input type="checkbox"/>	Demo	GDPR File system	h:\DEMO_tenant_GDPRFile
<input type="checkbox"/>	Demo	OneDrive archive	Jake Peralta
<input type="checkbox"/>	Demo	SharePoint archive	DEMO
<input type="checkbox"/>	Demo	SharePoint archive	Version testing
<input type="checkbox"/>	Demo	Sharing	jake.peralta@tech-arrow.com [Demo]

OK Cancel

The selected entities will be displayed under the **Select** button. Specify the information you want to search for and click on the **Search** button.

The screenshot shows the 'GDPR search' interface in the contentACCESS Portal. It features a search bar at the top with the text 'GDPR search'. Below the search bar, there are two tabs: 'Search for personal data' (selected) and 'Search for all sensitive data'. The search results are displayed in a table format, showing the following data:

Search in	Select
Email archive: jake.peralta@tech-arrow.com, Public folders	<input type="checkbox"/>
File system archive: H:\DEMO_tenant_FSA	<input type="checkbox"/>
GDPR Exchange: sandra.bullock@tech-arrow.com	<input type="checkbox"/>
OneDrive archive: Jake Peralta	<input type="checkbox"/>

Below the search results, there are several input fields for personal data: First name (Sandra), Last name, ID card, Email, Phone number, Country (Slovakia), Street, and Zip code. A 'Search' button is located at the bottom right of the search results area.

The search results will be displayed and you can perform all the actions as with results of **Quick search** or **Advanced search** – export, create report, legal hold, mark for delete and even create periodical search.



contentACCESS Portal | Connect to - | Jake Peralta -

contentACCESS Portal / Search | Gdprpersknown(persCountry/Slovakia/persFirstName/Sandra) Slovakia AND Sandra | Search in selected | English -

Model	Entity	Folder	Title	Date
GDPR Exchange	sandra.bullock@tech-arrow.com	Inbox/Important	Meeting with Hitachi	2020.09.29. 14:47:13
GDPR Exchange	sandra.bullock@tech-arrow.com	Deleted Items	Meeting with Hitachi	2020.09.29. 14:47:13
GDPR Exchange	sandra.bullock@tech-arrow.com	KeepOriginal	Meeting with Hitachi	2020.09.29. 14:47:13
GDPR Exchange	sandra.bullock@tech-arrow.com	Inbox	Test for flags and categories	2021.05.12. 09:28:58
Email archive	jake.peralta@tech-arrow.com	Inbox	FW: Úľult hđstęgrekordok repkednek Amerikában	2021.06.29. 08:27:13
GDPR Exchange	sandra.bullock@tech-arrow.com	Inbox	FW: Úľult hđstęgrekordok repkednek Amerikában	2021.06.29. 08:27:13
Email archive	jake.peralta@tech-arrow.com	Inbox	FW: Test message	2021.06.29. 08:27:40
GDPR Exchange	sandra.bullock@tech-arrow.com	Inbox	FW: Test message	2021.06.29. 08:27:40
Email archive	jake.peralta@tech-arrow.com	Inbox	Documents	2020.10.05. 13:22:15
Email archive	jake.peralta@tech-arrow.com	Inbox	FW: Fűľop herceg dietműve elűtt tisztelę kiűllitűs nyűllik a windsori kastelűban	2021.06.29. 08:27:22
Email archive	jake.peralta@tech-arrow.com	Inbox	FW: Źivel spustolűl českę obce na nepoznanie: Důraznę upozomenie pre vűetkjch obyvatelov	2021.06.29. 08:28:02
GDPR Exchange	sandra.bullock@tech-arrow.com	Inbox	FW: Źivel spustolűl českę obce na nepoznanie: Důraznę upozomenie pre vűetkjch obyvatelov	2021.06.29. 08:28:02
GDPR Exchange	sandra.bullock@tech-arrow.com	Inbox	FW: Fűľop herceg dietműve elűtt tisztelę kiűllitűs nyűllik a windsori kastelűban	2021.06.29. 08:27:22
Email archive	jake.peralta@tech-arrow.com	Sent Items	Meeting with Hitachi	2020.09.29. 14:47:13
GDPR Exchange	sandra.bullock@tech-arrow.com	Sent Items	ZIP OG	2022.02.01. 12:44:00
Email archive	jake.peralta@tech-arrow.com	Deleted Items	FW: SPA send as attachment - single item	2022.02.02. 21:50:21
Email archive	jake.peralta@tech-arrow.com	Inbox	RE: Tech news	2021.05.11. 11:16:29
GDPR Exchange	sandra.bullock@tech-arrow.com	Sent Items	MA Test 2	2022.02.04. 15:50:39

Meeting with Hitachi | From: Jake Peralta <jake.peralta@tech-arrow.com> | To: Melissa McCarthy <melissa.mccarthy@tech-arrow.com>, Sandra Bullock <sandra.bullock@tech-arrow.com> | Error: The portal seems to be incorrectly configured. Please contact your administrator.

### Search for all sensitive data

On this page, the user can search for bank accounts, credit card numbers and phone numbers.

contentACCESS Portal | Connect to - | Jake Peralta -

GDPR search

**Search for all sensitive data**

Sensitive information is data that must be protected from unauthorized access to safeguard the privacy or security of an individual or organization.

Search for personal data | Search for all sensitive data

Search in: Select

Email archive: jake.peralta@tech-arrow.com, Public folders  
 File system archive: H:\DEMO\_tenant\_FSA  
 GDPR Exchange: sandra.bullock@tech-arrow.com  
 OneDrive archive: Jake Peralta

Known patterns:

- Bank account IBAN
- Bank account BBAN
- Credit card VISA
- Credit card Mastercard
- Credit card Amex
- Phone number

Custom pattern:

Search

[Online help](#)

By clicking on the **Select** button, the entity selector popup window will open. Here the user may select entities he wants to search in. It is also possible to filter the entities by model type. Select the desired entities and click on **OK**.





Search in



Type search text here...

<input checked="" type="checkbox"/>	Tenant	Model	Entity	
<input checked="" type="checkbox"/>	Demo	Email archive	<input type="text" value="Enter text to filter..."/> <b>(All)</b> (Blanks) (Non blanks) Email archive File system archive GDPR Application	
<input checked="" type="checkbox"/>	Demo	Email archive		
<input type="checkbox"/>	Demo	File system archive		
<input type="checkbox"/>	Demo	File system archive		
<input checked="" type="checkbox"/>	Demo	File system archive		
<input type="checkbox"/>	Demo	GDPR Application		
<input type="checkbox"/>	Demo	GDPR Application		
<input type="checkbox"/>	Demo	GDPR Exchange		jake.peralta@tech-arrow.com
<input type="checkbox"/>	Demo	GDPR Exchange		melissa.mccarthy@tech-arrow.com
<input checked="" type="checkbox"/>	Demo	GDPR Exchange		sandra.bullock@tech-arrow.com
<input type="checkbox"/>	Demo	GDPR File system	h:\DEMO_tenant_GDPRFile	
<input checked="" type="checkbox"/>	Demo	OneDrive archive	Jake Peralta	
<input type="checkbox"/>	Demo	SharePoint archive	DEMO	
<input type="checkbox"/>	Demo	SharePoint archive	Version testing	
<input type="checkbox"/>	Demo	Sharing	jake.peralta@tech-arrow.com [Demo]	

OK Cancel



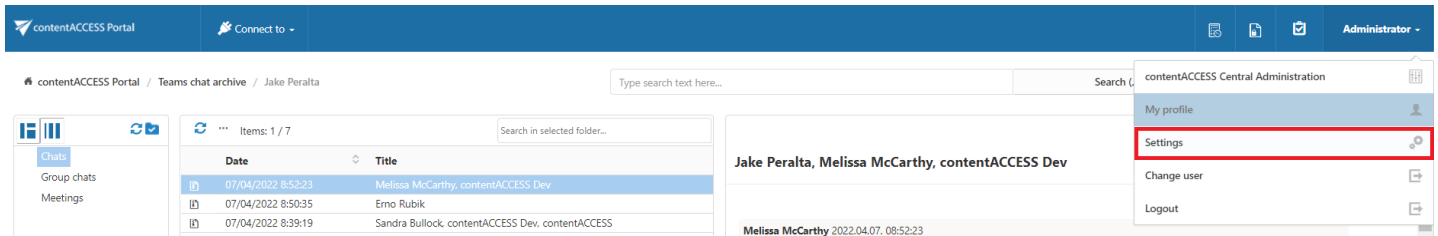
The selected entities will be displayed under the **Select** button. Select the information you want to search for, or define your own pattern and click on the **Search** button.

The search results will be displayed and you can perform all the actions as with results of **Quick search** or **Advanced search** – export, create report, legal hold, mark for delete and even create periodical search.

**Note:** If **Enable hit highlighting** is turned on in [Central administration](#), the located words will be highlighted with a yellow color.

## Editing Quick, Basic and Advanced search criteria

The search criteria that the contentACCESS Portal 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



contentACCESS Portal Administrator

Tasks Save settings | Reset | English

UI

contentACCESS Portal / UI Settings

Email archive  
Preview: Email

File system archive  
Preview: File

GDPR Application  
Preview: Basic

GDPR Exchange  
Preview: Email

GDPR File system  
Preview: File

Email Lifecycle Management archive  
Preview: Email

OneDrive archive  
Preview: SharePoint

SharePoint archive  
Preview: SharePoint

SharePoint proxy  
Preview: Basic

Sharing  
Preview: Basic

Teams archive  
Preview: SharePoint

Teams chat archive  
Preview: Teams

**Common settings**

Default search mode:  Fulltext  Classic

Default language:

Active and inactive items:

Show item count:

Load entities to Connect to menu:

**GDPR search**

Search for personal data:

Search for all sensitive data:

Table view columns  
  Quick search fields  
  Basic search fields  
  Advanced search fields

Common settings (6/6)	Email archive (6/9)	File system archive (5/6)	GDPR Application (1/2)	GDPR Exchange (5/8)	GDPR File system (4/6)	Email Lifecycle Management archive (6/5)	OneDrive archive (4/6)	SharePoint archive (4/6)	SharePoint proxy (1/1)	Sharing (7/7)	Teams archive (6/7)	Teams chat archive (5/5)
Visible (6)	Visible (6)	Visible (5)	Visible (1)	Visible (5)	Visible (4)	Visible (6)	Visible (4)	Visible (4)	Visible (1)	Visible (7)	Visible (6)	Visible (5)
Itemicon	Has attachment	File name	Title	Has attachment	File name	Has attachment	Name	Name	Title	File name	Author	Author
Model	From	Size	Hidden (1)	From	Folder	From	Modified date	Modified date		Shared by	Creation date	Chat
Entity	Subject	Folder	DataSource	Creation date	Creation date	Subject	Modified date	Modified date		Shared on	Has attachment	Modified date
Folder	Date	Creation date		Subject	Modified date	Date	Modified by	Size		Expiration date	Title	Date
Title	To	Modified date		Date		To	Size			Status	Uri	Folder
Date	Size	Hidden (1)		To	Hidden (2)	Size	Hidden (2)	Hidden (2)		Referenced model	Folder	Title
										Download		

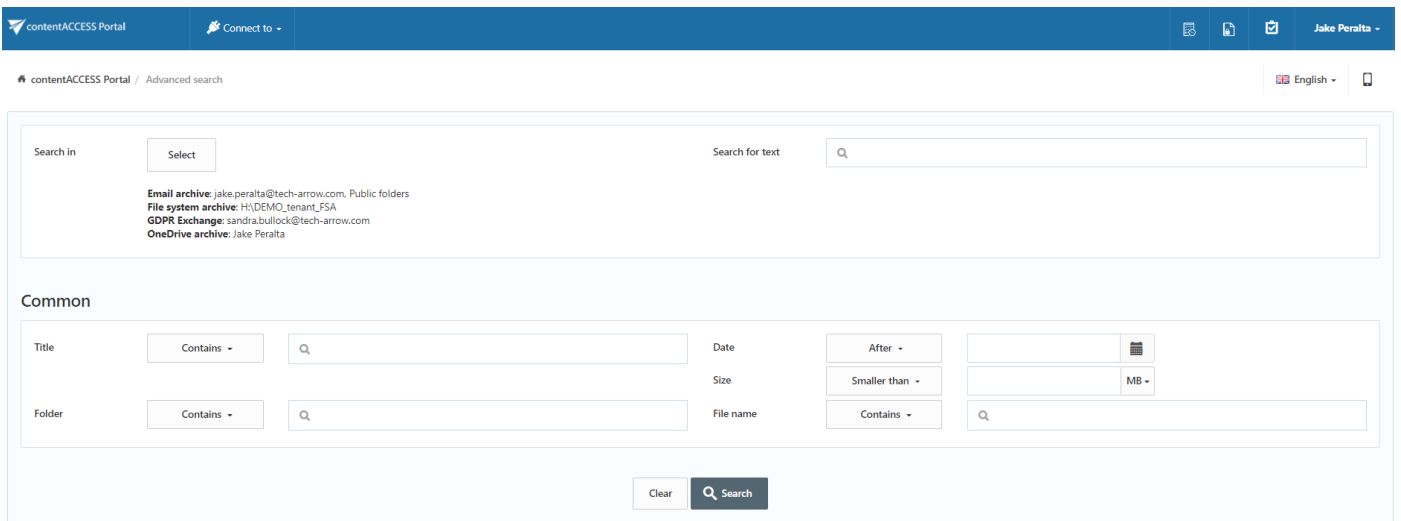


New search fields may be enabled/disabled for the available models (Email Archive, File Archive etc.) by clicking on the

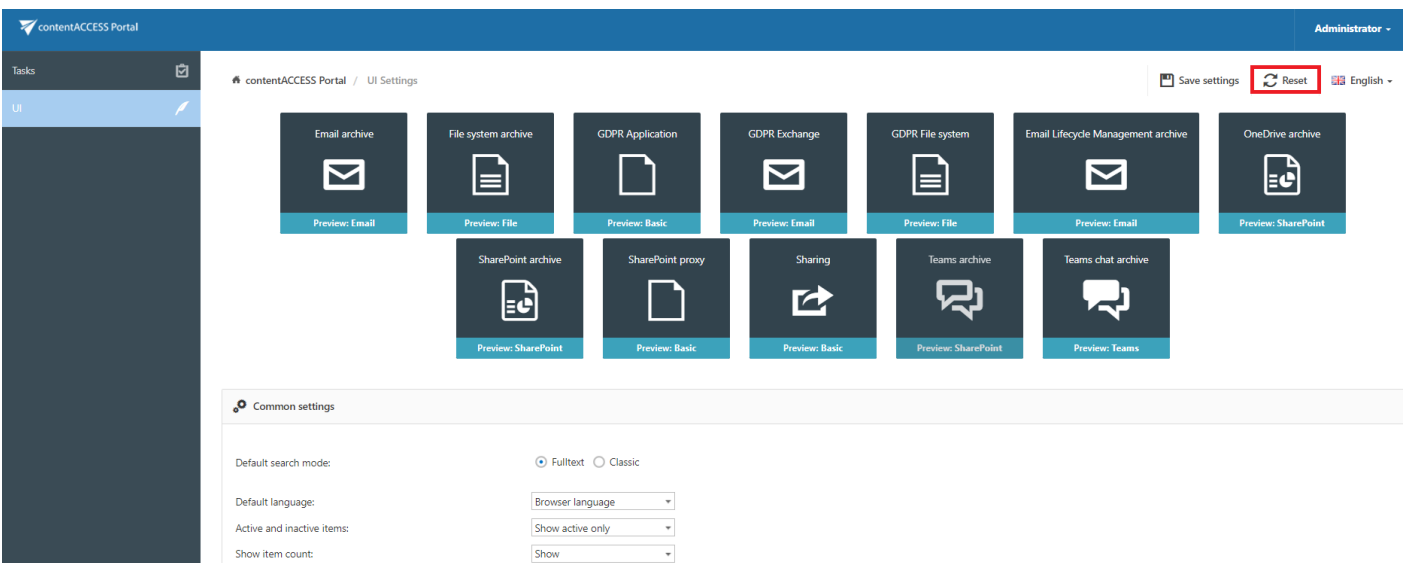
- check mark (✓) – means enable
- cross mark (✗) – means disable

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:



## eDiscovery process

Electronic discovery, or **eDiscovery**, is the process of identifying, gathering and processing data stored in electronic form in response to a request in legal proceedings such as litigation, law suit or government investigations.

The **first step** is to search for the data you want to/need to find and process. This can be easily done by using the search function in contentACCESS Portal and applying filters to narrow down the search. For this task, we recommend one of the following options (or even combination of them, if necessary):

- [Fulltext search](#) - search in the entity selected in **Connect to** by multiple criteria
- [Advanced search](#) - search in multiple entities by multiple criteria
- [GDPR search](#) - if you need to search for sensitive data (items containing name, phone number, address, card number, etc.)

**After the search has been performed**, it is possible to configure a [Periodical search](#). Thanks to this feature the user won't have to manually search if someone worked with sensitive data, but can let the system do the work instead. The system will be also sending notification emails with the results of the periodical search to the specified recipients - this way **any data leakage can be detected very soon**.

### Create periodical search ×

Search name:

Notification recipients:

Tenant:

Keep results:

Recurrence:

Sunday  
  Monday  
  Tuesday  
  Wednesday  
 Thursday  
  Friday  
  Saturday

At:

Description:

The search results can be exported as **PST** (if the results are only from Email archive) or **ZIP** file. The ZIP file will also contain [Manifest file](#) - an .xls file that contains summary about the exported items. Export actions can be [downloaded](#) from **Tasks list** or **Tasks page**.



### Export to PST ✕

**Name \*:**

**Export:**  All items from the search result  
 Selected item(s) (1)

**Tenant \*:**

Screenshot: Exporting items as PST

### Export to zip ✕

**Name \*:**

**Export:**  All items from the search result  
 Selected item(s) (1)

**Tenant \*:**

Screenshot: Exporting items as ZIP

The [legal hold](#) feature allows to create a legal hold case, where the user can put documents (searchresults) afterwards. Documents that are under a legal hold case can't be deleted from the system until the legal hold expires.

### Manage legal hold case ✕

Create new legal hold case
Update existing legal hold case

**Name\*:**

**Description:**

Never expires

**Expiration date:**

**Tenant\*:**

Only documents belonging to selected tenant going to be processed

All items (42 items)  
 Selected item(s) (1 items)

case



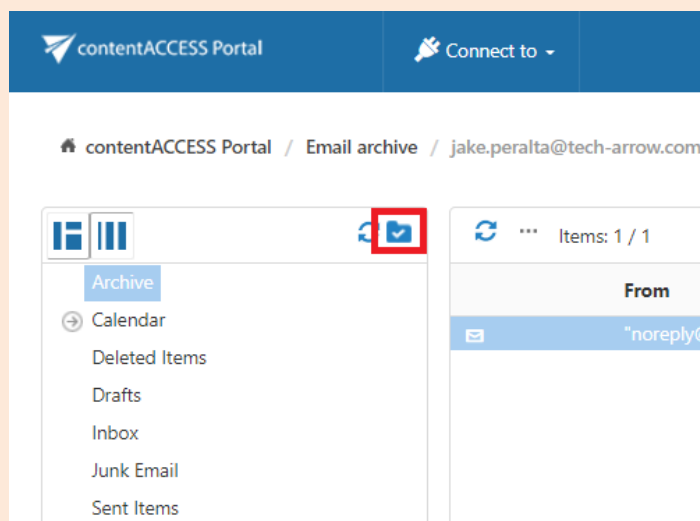


If you don't want to export search results as ZIP, but want to have an **.xls document with summary** about them (similar to the manifest file), it is possible to create one by using the [Create report](#) function. The report can be then downloaded from **Tasks list** or **Tasks page**.

## Folder selection methods

In the following subchapters we will describe how multiple folders/items may be selected in the contentACCESS Portal 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**.



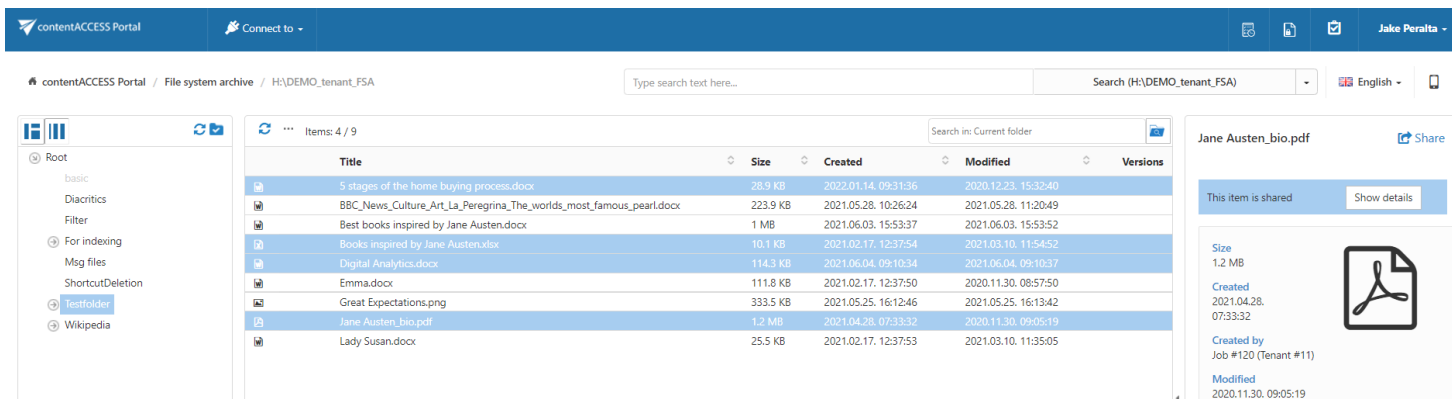
## Multi-selection

### Multiple item selection:

If the user would like to perform any operations on the contentACCESS Portal 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);

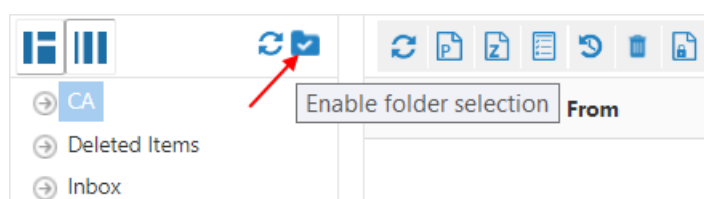


Title	Size	Created	Modified	Versions
5 stages of the home buying process.docx	28.9 KB	2022.01.14. 09:31:36	2020.12.23. 15:32:40	
BBC_News_Culture_Art_La_Peregrina_The_worlds_most_famous_pearl.docx	223.9 KB	2021.05.28. 10:26:24	2021.05.28. 11:20:49	
Best books inspired by Jane Austen.docx	1 MB	2021.06.03. 15:53:37	2021.06.03. 15:53:52	
Books inspired by Jane Austen.xlsx	10.1 KB	2021.02.17. 12:37:54	2021.03.10. 11:54:52	
Digital Analytics.docx	114.3 KB	2021.06.04. 09:10:34	2021.06.04. 09:10:37	
Emma.docx	111.8 KB	2021.02.17. 12:37:50	2020.11.30. 08:57:50	
Great Expectations.png	333.5 KB	2021.05.25. 16:12:46	2021.05.25. 16:13:42	
Jane Austen_bio.pdf	1.2 MB	2021.04.28. 07:33:32	2020.11.30. 09:05:19	
Lady Susan.docx	25.5 KB	2021.02.17. 12:37:53	2021.03.10. 11:35:05	

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

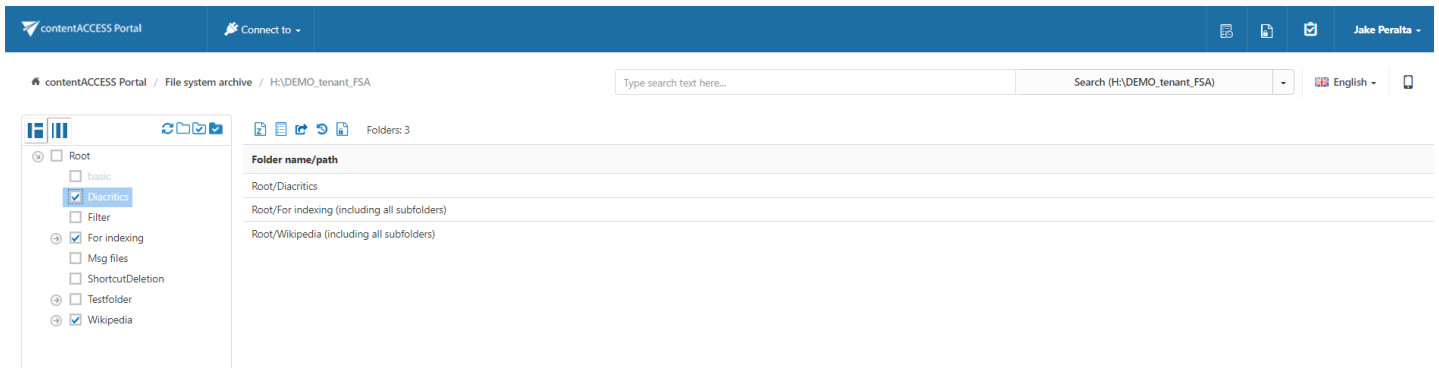
### Multiple folder selection:

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 contentACCESS Portal's navigation pane.

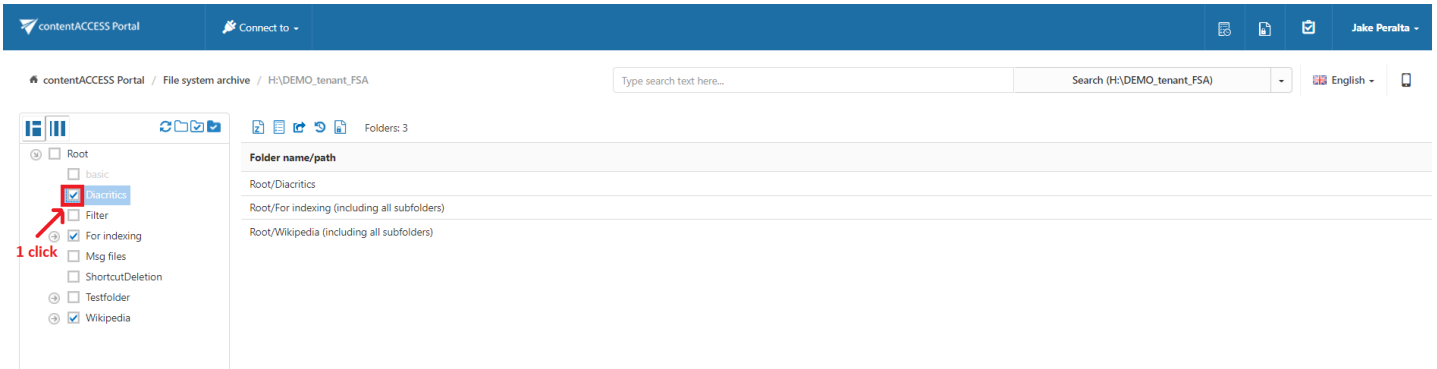
By **double clicking** the parent folder's checkbox, **only the parent will be selected, on third click the already selected folder will be deselected.**

*Selecting the entire folder structure:*



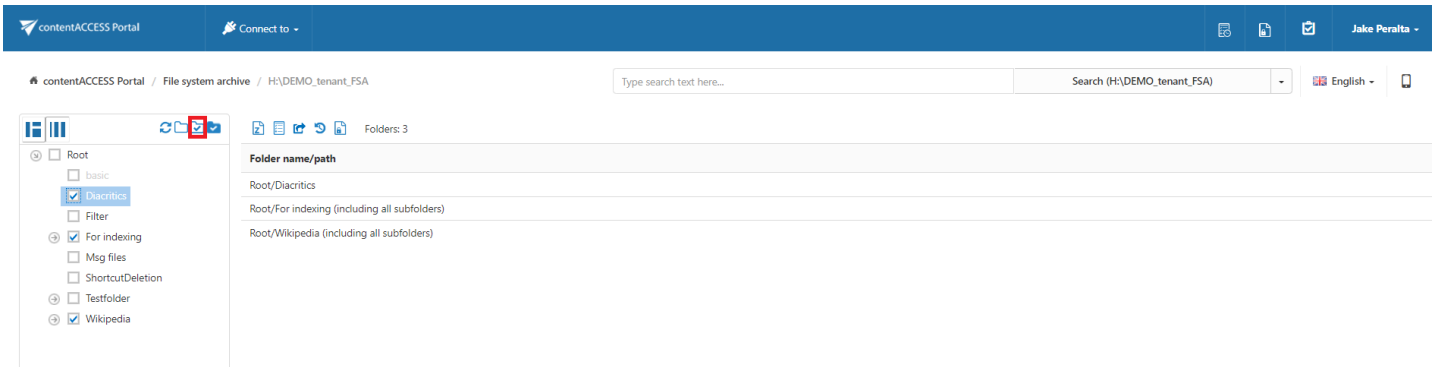
The user may select the **whole recursive folder structure by**

- a **single click** into the checkbox of the main parent folder. The information that the sub-folders 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 contentACCESS Portal pane:

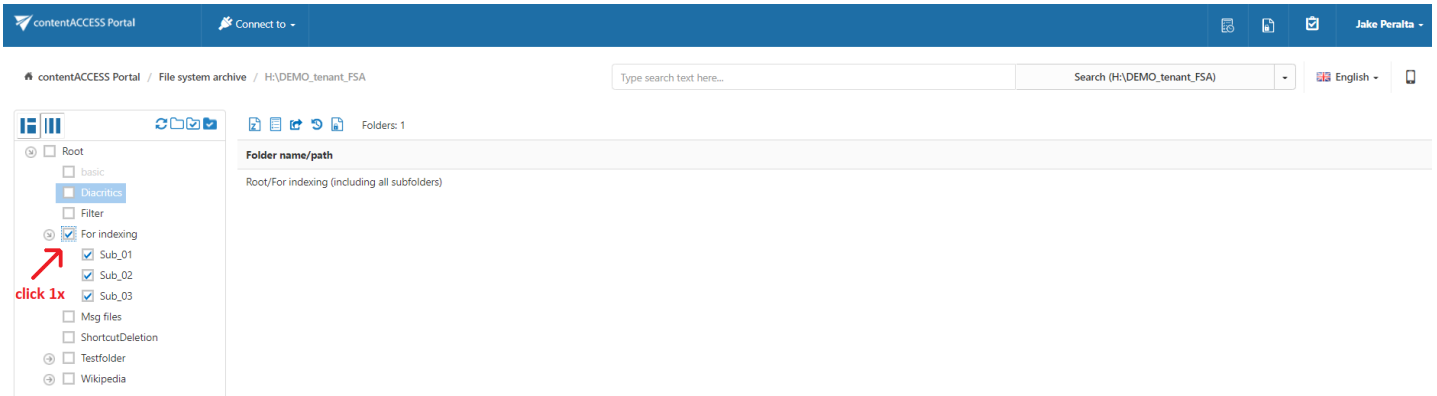


Screenshot: Selecting the whole recursive folder structure using the **Select all folders** icon

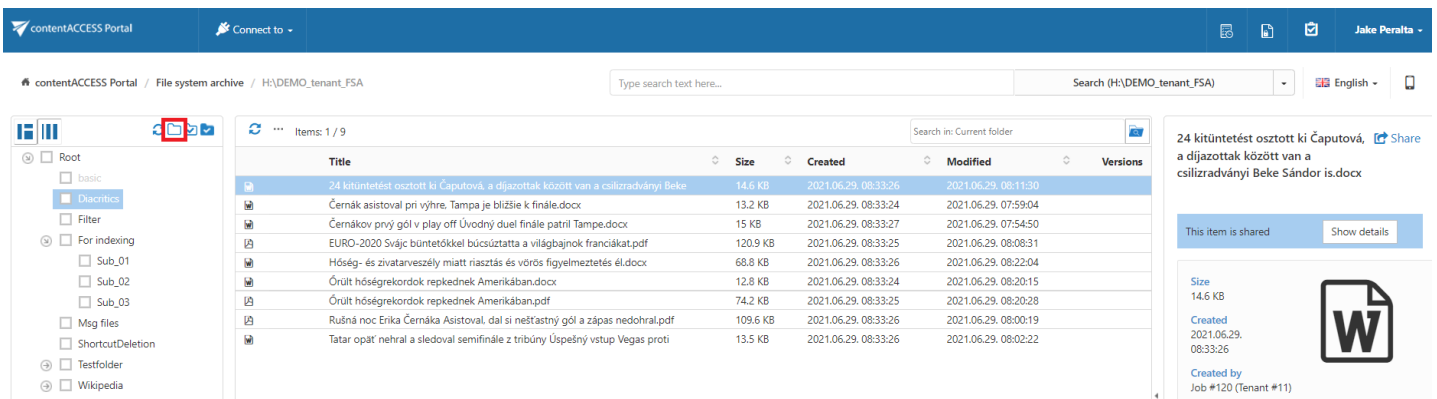
*Selecting a recursive folder structure starting from a parent folder:*

The user may select a folder structure starting from a parent folder

- by clicking **1x** into the checkbox of the **given parent folder**:



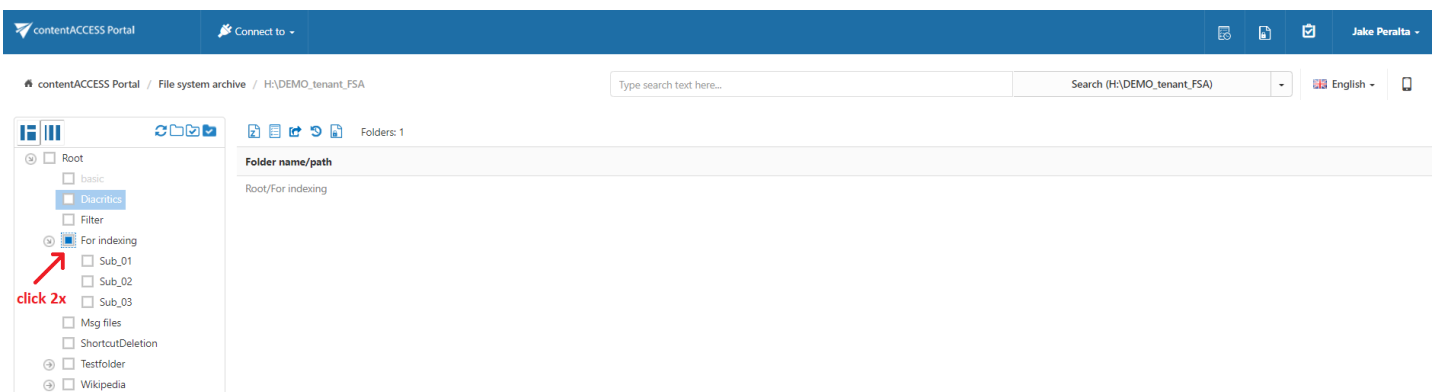
- use the **Deselect all folders** icon above the contentACCESS Portal pane to deselect all already selected folders:



Screenshot: Deselecting the whole recursive folder structure using the **Select none** icon

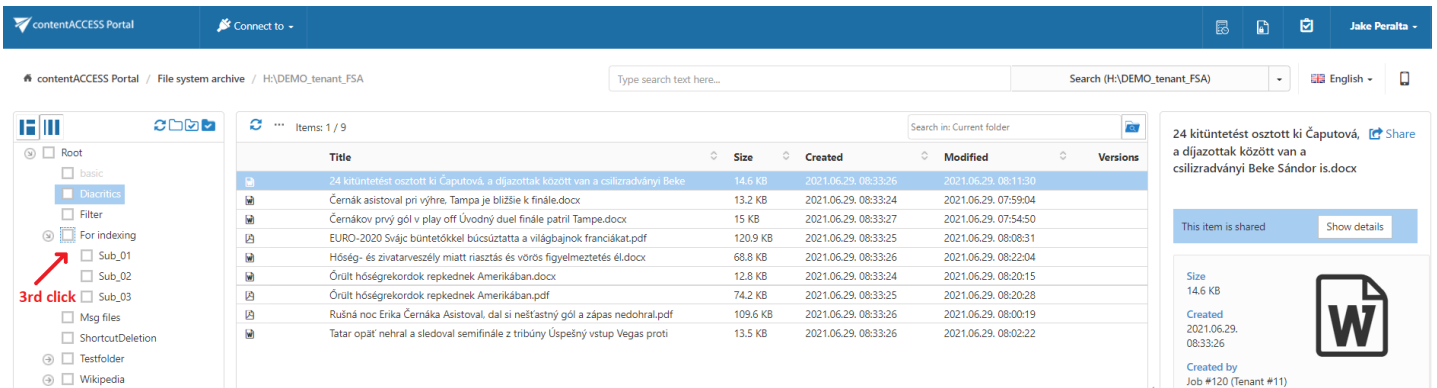
### Selecting the parent folder without its subfolders:

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.



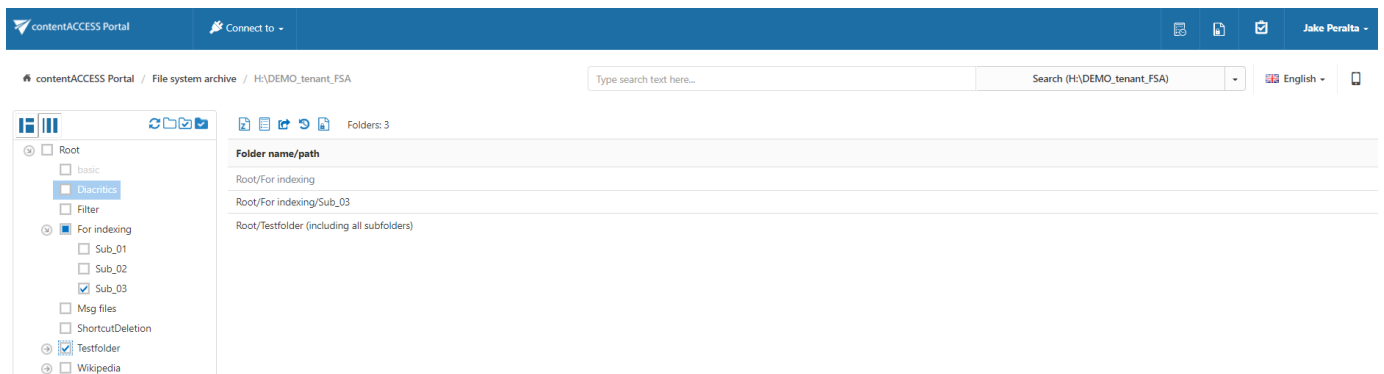
Screenshot: Selecting the parent folder by double-clicking the check box

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 contentACCESS Portal are entity-specific. The available tasks can be triggered using the appropriate toolbar buttons located above the items grid. There are 7 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. **Create report** – creates a XLS file containing a list of the selected files and their details
5. **Share item(s)** – share items with selected users or your whole organization directly from contentACCESS Portal, without the need to use any other applications nor send large attachments; single items can be shared by using the **Share** button in the upper right corner too
6. **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)
7. **Delete** – allows to mark/unmark documents for/from delete
8. **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.



**Important:** When the user selects items to **mark/unmark documents** for/from delete from the **search results list**, and the task is done on the Task list, the **index job** has to run. Otherwise, the bin icon won't appear/disappear next to the selected items.

The screenshot shows the contentACCESS Portal interface. The toolbar at the top contains several icons, with callouts 1 through 8 pointing to specific buttons. The main area displays a list of email items with columns for Subject, Date, To, and Size. The sidebar on the left shows navigation options like Archive, Deleted Items, Drafts, Inbox, Junk Email, and Sent Items. The right sidebar shows details for the selected item, including From, Date, To, Expiration date, Start date, and End date.

Subject	Date	To	Size
	2021.06.07. 19:14:59	szilvia.kelemen@tech-arrow.com	104 KB
Triple testing meeting	2021.05.06. 10:20:23	sandra.bullock@tech-arrow.com;melissa.mccarthy@tech-arrow.com	116 KB
Double testing meeting	2021.05.06. 10:14:42	sandra.bullock@tech-arrow.com	116 KB
	2021.05.06. 10:13:50	melissa.mccarthy@tech-arrow.com	108 KB
Testing	2021.05.06. 10:13:46	DEMO_Team@tech-arrow.com;jake.peralta@tech-	132 KB
Demo test	2021.01.15. 15:54:38	sandra.bullock@tech-arrow.com;jake.peralta@tech-	112 KB

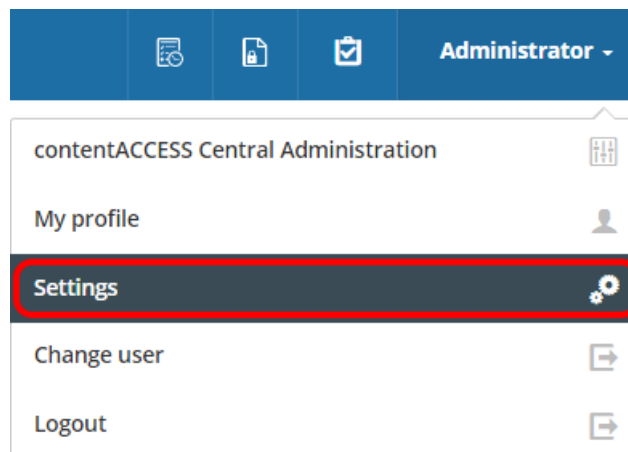
Screenshot: Toolbar buttons used to trigger Email archive tasks

Toolbar buttons are available from the search page, too.

## 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.



contentACCESS Portal Administrator

Tasks

contentACCESS Portal / Tasks Settings

Save settings Reset English

Common settings

Remove task after download

Task types Manifest

Task types supported by a model

	Export to PST	Export to zip	Recovery	Mark for delete	Legal hold	Report	Share
Advanced Sharing	-	✗	-	-	-	✗	-
Email Archive	✓	✓	✓	✓	✓	✓	✓
File System Archive	-	✓	✓	✓	✓	✓	✓
GDPR Application	-	✓	-	-	-	✓	✓
GDPR Exchange	✓	✓	-	-	-	✓	✓
GDPR File System	-	✓	-	-	-	✓	✓
Legacy Email Archive	✓	✓	-	-	-	✓	✗
One Drive Archive	-	✓	✓	✓	✓	✓	✓
Share Point Archive	-	✓	✓	✓	✓	✓	✓
Share Point Proxy	-	✗	-	-	-	✗	✗
Sharing Model	-	✓	-	-	-	✓	-
Teams Archive	-	✓	-	✓	-	✓	✓
Teams Chat Archive	-	✓	-	✓	-	✓	✓

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.



contentACCESS Portal Administrator

Leave site?  
Changes you made may not be saved.

Save settings Reset English

contentACCESS Portal / Tasks Settings

Common settings

Remove task after download

Task types Manifest

Task types supported by a model

	Export to PST	Export to zip	Recovery	Mark for delete	Legal hold	Report	Share
Advanced Sharing	-	✗	-	-	-	✓	-
Email Archive	✓	✓	✓	✓	✓	✓	✓
File System Archive	-	✓	✓	✓	✓	✓	✓
GDPR Application	-	✓	-	-	-	✓	✓
GDPR Exchange	✓	✓	-	-	-	✓	✓
GDPR File System	-	✓	-	-	-	✓	✓
Legacy Email Archive	✓	✓	-	-	-	✓	✗
One Drive Archive	-	✓	✓	✓	✓	✓	✓
Share Point Archive	-	✓	✓	✓	✓	✓	✓
Share Point Proxy	-	✗	-	-	-	✗	✗

## Create report

The **Create report** task creates a XLS file, which can be later downloaded from the Tasks list or Tasks page. The downloaded file is saved on the resource storage. It contains a summary about the selected items.

To create a report file, select some items and click on the **Create report** button.

contentACCESS Portal Connect to - Jake Peralta

contentACCESS Portal / Email archive / jake.peralta@tech-arrow.com

Type search text here... Search (jake.peralta@tech-arrow.com) English

Items: 1 / 6

- Export selected message(s) as a PST file.
- Export selected item(s) as a ZIP file.
- Create report**
- Share
- Recover selected item(s).
- Mark document(s) for delete
- Legal hold

Subject	Date	To	Size
	2021.06.07. 19:14:59	szilvia.kelemen@tech-arrow.com	104 KB
Triple testing meeting	2021.05.06. 10:20:23	sandra.bullock@tech-arrow.com;melissa.mccarthy@tech-arrow.com	116 KB
Double testing meeting	2021.05.06. 10:14:42	sandra.bullock@tech-arrow.com	116 KB
Testing	2021.05.06. 10:13:50	melissa.mccarthy@tech-arrow.com	108 KB
	2021.05.06. 10:13:46	DEMO_Team@tech-arrow.com;jake.peralta@tech-	132 KB
Demo test	2021.01.15. 15:54:38	sandra.bullock@tech-arrow.com;jake.peralta@tech-	112 KB

From: jake.peralta@tech-arrow.com  
Date: 2021.06.07. 19:14:59  
To: szilvia.kelemen@tech-arrow.com  
Expiration date: 2022.06.29.  
Start date: 2021.06.07. 19:20:00  
End date: 2021.06.07. 19:50:00  
CA\_Keep

This email is shared Show details

A pop-up window opens. Name your report and choose if you want to get summary of all items (all items in the selected folder) or only of the selected items. Click **Create**.



### Report ×

**Name \*:**

**Export:**  All items  
 Selected item(s)

Download the file from the Tasks list or the Tasks page.

Administrator ▾

Tasks list
↗

Description	Status	Progress	⋮
Report Wed May 30 2018	Done	100%	<span style="color: red;">→</span> <div style="display: flex; flex-direction: column; align-items: center;"> <span>📄</span> <span>🗑️</span> </div>
contentWEB Export 5/30/2018 test4	Done	100%	<div style="display: flex; flex-direction: column; align-items: center;"> <span>📄</span> <span>🗑️</span> </div>
contentWEB Export 5/30/2018 test3	Done	100%	<div style="display: flex; flex-direction: column; align-items: center;"> <span>📄</span> <span>🗑️</span> </div>
contentWEB Export 5/30/2018 test2	Done	100%	<div style="display: flex; flex-direction: column; align-items: center;"> <span>📄</span> <span>🗑️</span> </div>
contentWEB Export 5/30/2018 test1	Done	100%	<div style="display: flex; flex-direction: column; align-items: center;"> <span>📄</span> <span>🗑️</span> </div>

+ 106 other tasks

On the **Summary** tab the user may view the task summary information, the creation date and who created the report action and the total number of the items.



## Report Wed May 30 2018

Tenant: **Tech-Arrow**  
 Created on: **5/30/2018 2:27:03 PM**  
 Created by: **Administrator**

### Email archive

Number of items **4**

Summary | Email archive

On the **Entity** tab (the tab is named based on the entity of the items) the user may find the title of the items, their type, size and path of each item.

Email archive											
<a href="#">&lt; Back to Summary</a>											
Title	Type	Size	Path	Date	Subject	From	To	Message c	Has attach	Importanc	Mailbox
<a href="#">Test shared file</a>	msg	18 KB	Inbox	2017-10-2	Test share /o=Exchan			IPM.Note	False	1	@tech-arrow.com
<a href="#">New 6.6.45 setup(s)</a>	msg	76 KB	Inbox	2016-11-3	New 6.6.4 elmbuild02			IPM.Note	False	1	@tech-arrow.com
<a href="#">New contentACCESS setup 3.1.35.0 is ready</a>	msg	56 KB	Inbox	2016-11-2	New conte<noreply@<build_not			IPM.Note	False	1	@tech-arrow.com
<a href="#">New contentACCESS setup 3.1.35.0 is ready</a>	msg	88 KB	Inbox	2016-11-2	New conte<noreply@<build_not			IPM.Note	False	1	@tech-arrow.com

## Share item(s)

The **sharing feature** allows the user to specify the restriction and retention to be applied for the shared items when sharing them. This eliminates the need to retrospectively check the shared files and revoke access to older files.

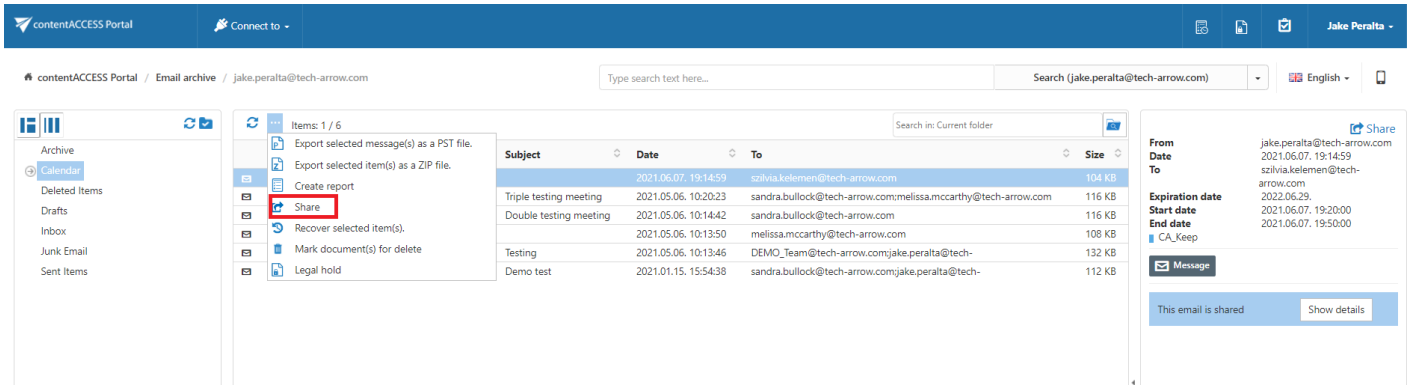
It also automates the **user invitation** process in case the items are shared with an external recipient and sends an email with links pointing to the shared items. This makes the sharing very fast and useful for end users.

From the security side, it provides full **Auditing log** about the sharing user, who was downloading the file, when and from which machine and location, etc.

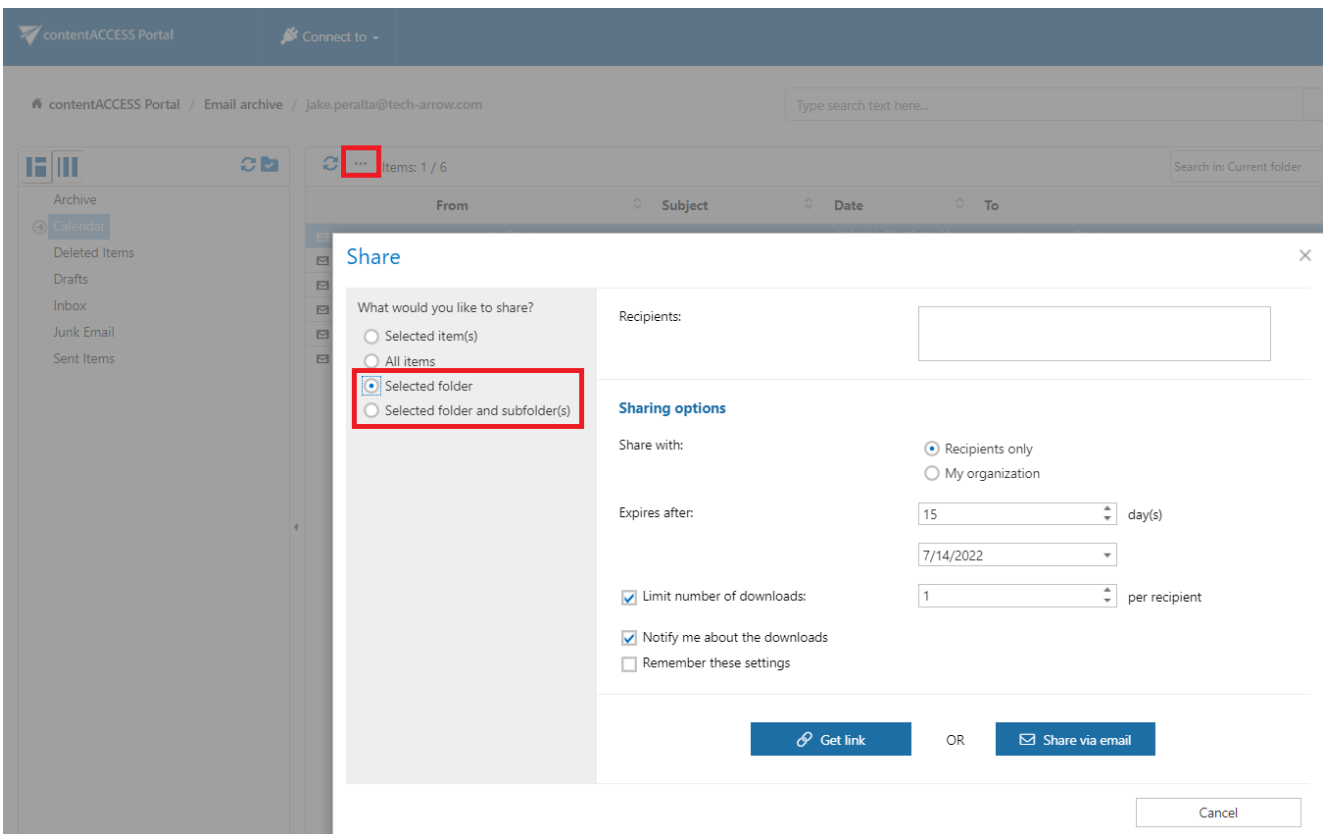
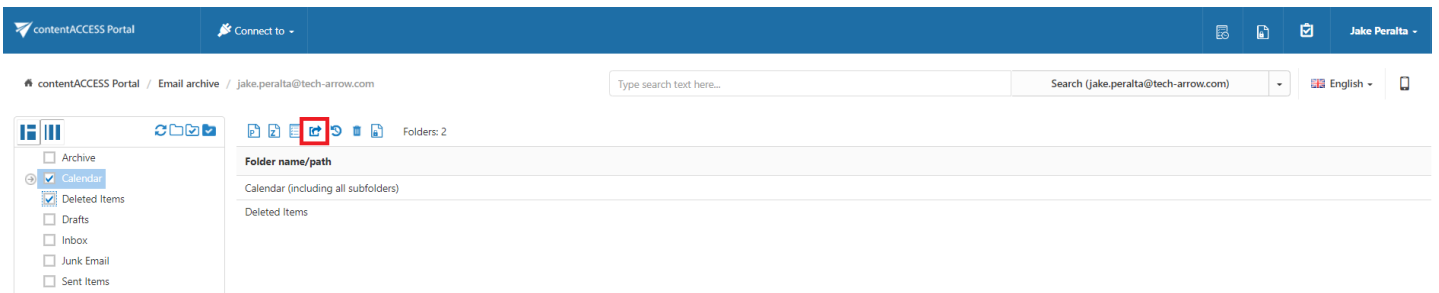
To share any items, select them and then click on the **Share item(s)** option. If you want to share only one item, it is enough to use the **Share** button in the top right corner (marked with arrow on



screenshot below).



It is also possible to **share folders** from the context menu of the items list or the actions from the folder structure. The sharing process is the same as during the item sharing: add recipients, select the download limit and expiration date and send the email or get the link (more information is below).





A pop-up window opens.

Into the **Recipients** field, write the email addresses of the people you want to share the item(s) with. In

**Sharing** options, specify who would you like to make the item(s) accessible for:

- **Recipients only** – even if the email with the link is forwarded, only the recipients will be able to access the shared item(s)
- **My organization** – only people from your organization (specified in Central Administration -> System -> Services -> Sharing settings) will be able to access the shared item(s)
- **Public** – anyone with the link will be able to access the shared item(s)

A large, empty rectangular box with a light blue background and a thin black border, likely representing a field for entering recipient email addresses.

Specify how many days do you want the item to **expire in** or select the date from the calendar. It is also possible to **limit the number of downloads**, based on the option selected in **Share with**:

- **Recipients** – number of downloads per recipient
- **My organization** - number of downloads per user
- **Public** - number of downloads together

With the **Notify me about the downloads** function, the owner can get information about the downloads from the recipients' side. As soon as the users download the shared item, a notification email will be sent to the owner with the following information:

- User, who downloaded the item
- Downloaded file
- Downloaded time
- Downloaded remaining



Your files were downloaded



Dear [emily.bronte@tech-arrow.com](mailto:emily.bronte@tech-arrow.com),

Elena Ferrante has downloaded your shared file.

Downloaded file: **OG Search.xlsx**

Downloaded time: **3/18/2022 3:13 PM**

Downloaded remaining: **2/2**

You can access them using the following link(s):

 [OG Search.xlsx](#)

Sincerely, your contentACCESS Team.

You can also save these sharing settings for future use by checking the **Remember these settings** checkbox. That way you won't need to fill in the **Sharing options** next time.

If you are sharing an email with attachments, you can choose if you would like to share **only those attachments** (even select only some of them) or **the entire email**.

## Share: Aurora and rare moonbows light up the night



What would you like to share?

Entire item  
 Attachment(s) only  
 Aurora\_pictures.zip

Recipients:

**Sharing options**

Share with:
   
 Recipients only
   
 My organization
   
 Public


Expires after:  day(s)

Limit number of downloads:  per recipient  
 Notify me about the downloads  
 Remember these settings

OR

Finish the sharing by clicking on one of the two options: **Get link** or **Share via email**. If you select Get link, the link to the shared item(s) will be copied to your clipboard and you will get this window.

Sharing completed

 The sharing link was copied to the clipboard.

[Copy](#)

If you select **Share via email**, the link to the shared item(s) will be inserted to the body of the email and you will be able to write a message, too. The subject of the email will be **[USER] has shared items with you**. Click on **Send** to finish the sharing.





Share: RE: Help!

What would you like to share?

Entire item  
 Attachment(s) only

- Great Expectations.png
- Call of the Wind.png
- Drakula.png
- Frankenstein.png
- Moby Dick.png
- 1.jpg
- Crime and punishment.png
- One Hundred Years of Solitude.png

Recipients:

**Sharing options**

Share with:
 

- Recipients only
- My organization
- Public

Expires after:  day(s)

Limit number of downloads:  per recipient

Notify me about the downloads

Remember these settings

Message:

If an item has been shared before, it will be marked in its preview. The item sharing is marked with the item icon, and the folder sharing is marked with the folder icon.

Aurora and rare moonbows light up the night Share

**From** jake.peralta@tech-arrow.com  
**Date** 2020.09.29, 15:10:25  
**To** sandra.bullock@tech-arrow.com  
**Cc** melissa.mccarthy@tech-arrow.com  
**Expiration date** 2021.05.22.  
 CA\_Html;CA

Message

Aurora\_pictures.zip (205 KB)

This email is shared Hide details

Shared on	Shared with	Status	Action
2022.02.02.	Sandra	Expired	Status Modify
2022.02.01.	Organization	Expired	Status Modify
2022.02.01.	Organization	Expired	Status Modify
2022.01.31.	Sandra	Expired	Status Modify
2022.01.28.	Sandra	Expired	Status Modify
2022.01.17.	Sandra	Expired	Status Modify
2021.05.02.	Organization	Expired	Status Modify

If you have applicable rights and permissions, you will be able to modify the sharing settings. Click on the **Modify** option. The **Modify sharing options** window will open. Here, you will be able



to add and/or remove recipients, change accessibility, the expiration date and download limit. The option **Save and get link** works the same as **Get link**, the option **Save and share via email** works the same as **Share via email**. The option **Save** just saves the changes that were made to the sharing settings.

### Modify sharing options ×

Sharing options
Status

Recipients:

#### Sharing options

Share with:

Recipients only  
 My organization  
 Public

Expires after:  day(s)

Limit number of downloads:  globally  
 Notify me about the downloads  
 Remember these settings

🔗 Save and get link

✉️ Save and share via email

💾 Save

When you click on the **Status option**, you will be redirected to the window where you will be able to view the status and information about the selected sharing. From here, it is also possible to **Activate or Suspend** the sharing. When an item (or whole sharing) is **suspended**, it is not possible to download it, until it is activated back again. If necessary, it is also possible to re-send the sharing notification by clicking on **the Send sharing notification button**.



## Modify sharing options



Sharing options    Status

Status: **Active [1]**    [Suspend all](#)

Shared by: Jake Peralta

Shared on: 2022.03.24.

Expires on: 2022.04.08.

Download limit: 1 globally

Shared with: Public

### Shared items:

Name	Status	
RE_Help!.msg	Active	<a href="#">Suspend sharing</a>

Close

When you connect to the **Sharing model**, some items will have the **Show related files** button in their preview. This means that the item was shared together with at least one more item and you can view the list of items by clicking on that button.

The screenshot shows the contentACCESS Portal interface. At the top, there's a navigation bar with 'contentACCESS Portal' and 'Connect to -'. Below it, a search bar and user information 'Jake Peralta' are visible. The main area displays a list of shared items with columns for File name, Shared by, Shared on, Expiration date, Status, Referenced model, and Download limit. The item 'Sandra Bullock, contentACCESS Dev, contentACCESS.zip' is highlighted. To the right, a preview pane shows details for this item, including its status (Expired), shared by (Jake Peralta), and expiration date (2022.05.12, 15:26:32). A 'Show related files' button is highlighted in red in the preview pane.


File name	Shared by	Shared on	Expiration date	Status	Referenced model	Download limit
sandra.bullock@tech-arrow.com has downloaded your 10 film to watch this April_The Northman.txt	jake.peralta@tech-arrow.com	2022.06.22.	2022.06.23.	Expired	Email archive	1
Sandra Bullock, contentACCESS Dev, contentACCESS.zip	jake.peralta@tech-arrow.com	2022.05.12.	2022.05.27.	Expired	Teams chat	1
Erika Bugár, Szilvia Kelemen.zip	jake.peralta@tech-arrow.com	2022.05.12.	2022.05.27.	Expired	Teams chat	1
Melissa McCarthy, Sandra Bullock, contentACCESS Dev.	jake.peralta@tech-arrow.com	2022.05.12.	2022.05.27.	Expired	Teams chat	1
Melissa McCarthy, contentACCESS Dev.zip	jake.peralta@tech-arrow.com	2022.05.12.	2022.05.27.	Expired	Teams chat	1
Demo test.zip	jake.peralta@tech-arrow.com	2022.05.12.	2022.05.27.	Expired	Teams chat	1
Szilvia Kelemen.zip	jake.peralta@tech-arrow.com	2022.05.12.	2022.05.27.	Expired	Teams chat	1
RE_Help!.msg	jake.peralta@tech-arrow.com	2022.03.24.	2022.04.08.	Expired	Email archive	1
Erno Rubik.zip	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams chat	1
Erno Rubik.zip	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams chat	1
Erno Rubik.zip	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams chat	1
Erno Rubik.zip	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams chat	1
Erno Rubik.zip	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams chat	1
Erno Rubik.zip	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams chat	1
Erno Rubik.zip	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams chat	1
Erno Rubik.zip	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams chat	1
Melissa McCarthy, Sandra Bullock, contentACCESS Dev.	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams chat	1
Szilvia Kelemen.zip	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams chat	1
Erno Rubik.zip	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams chat	1
Erno Rubik.zip	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams chat	1
Posts	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams archive	1
Files	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams archive	1
General	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams archive	1
General	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams archive	1
Yellowstone National Park.docx	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams archive	1
Welcome to North Dakota.jpg	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams archive	1
The_Iron_King_Circle_of_life_lyrics_english.txt	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams archive	1
The Proposal_bio.pdf	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	Teams archive	1



The list will look for example like this:

File name	Shared by	Shared on	Expiration date	Status	Referenced model	Download limit
Greetings from Wyoming.jpg	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	OneDrive archive	1
Elvis Presley.jpeg	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	OneDrive archive	1
Montana nature.jpg	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	OneDrive archive	1
2011-ford-fiesta-owners-	jake.peralta@tech-arrow.com	2022.03.02.	2022.03.17.	Expired	OneDrive archive	1

**Greetings from Wyoming.jpg**



Status: Expired

Shared by: Jake Peralta

Shared on: 2022.03.02. 09:04:32

Expiration date: 2022.03.17. 23:59:59

Download limit: 1 per user

Download count: 1

Shared with: Organization

Recipient(s): No recipients specified

Model: OneDrive archive

[Modify sharing options](#) [Show related files](#)

Download history [↻](#)

[Online help](#)

In the **Sharing** model, the recipient can't download the whole folders, only the items from the folders. Click on the folder's name, and the user will see the items from the shared folder.

File name	Shared by	Shared on	Expiration date	Status	Referenced model	Download limit
Calendar	sandrabullock@tech-arrow.com	2022.02.21.	2022.03.13.	Expired	Email archive	20
New NBA season to test LeBron James abilities.pdf	sandrabullock@tech-arrow.com	2022.02.21.	2024.11.16.	Active	Teams archive	Un
jake.peralta@tech-arrow.com has downloaded your shared	sandrabullock@tech-arrow.com	2022.02.21.	2024.11.16.	Active	Email archive	Un
Academic Transfer.docx	sandrabullock@tech-arrow.com	2022.02.21.	2022.03.13.	Expired	File system archive	20
Academic Transfer.docx	sandrabullock@tech-arrow.com	2022.02.21.	2022.03.13.	Expired	File system archive	20
Academic Transfer.docx	sandrabullock@tech-arrow.com	2022.02.21.	2022.03.13.	Expired	File system archive	20
Jake.msg	sandrabullock@tech-arrow.com	2022.02.10.	2022.03.02.	Expired	Email archive	20
Melissa.msg	sandrabullock@tech-arrow.com	2022.02.10.	2022.03.02.	Expired	Email archive	20
BBC_news_culture_the_tv_shows_that_reveal_the_real_France.msg	sandrabullock@tech-arrow.com	2022.02.10.	2022.03.02.	Expired	Email archive	20
Andy Samberg's career.msg	sandrabullock@tech-arrow.com	2022.02.10.	2022.03.02.	Expired	Email archive	20
1001 book you should read.xlsx	jake.peralta@tech-arrow.com	2022.02.07.	2022.02.11.	Expired	OneDrive archive	1
Virtual Drive.pptx	sandrabullock@tech-arrow.com	2022.02.07.	2022.03.02.	Expired	Direct upload	23
CA - GATE.contentACCESS.log	sandrabullock@tech-arrow.com	2022.02.07.	2022.02.19.	Expired	Direct upload	12
Archive with share path 2.3.44 - mcs01 problem.txt	sandrabullock@tech-arrow.com	2022.02.07.	2022.02.19.	Expired	Direct upload	12
Add - Edit tenant.jpg	sandrabullock@tech-arrow.com	2022.02.07.	2022.02.19.	Expired	Direct upload	12
1001 movie you should watch.txt	sandrabullock@tech-arrow.com	2022.02.07.	2022.02.08.	Expired	OneDrive archive	1
Test with emails attach.msg	sandrabullock@tech-arrow.com	2022.02.07.	2022.02.08.	Expired	Email archive	1
Test with emails attach.msg	sandrabullock@tech-arrow.com	2022.02.07.	2022.02.08.	Expired	Email archive	1
2016-18-college-catalog-north-seattle-college.pdf	sandrabullock@tech-arrow.com	2022.02.04.	2022.02.04.	Expired	File system archive	2
Emily Bronte.zip	sandrabullock@tech-arrow.com	2022.02.04.	2022.02.11.	Expired	Teams chat archive	2
Health Med Computers 0809_1.docx	sandrabullock@tech-arrow.com	2022.02.04.	2022.02.05.	Expired	GDPR File system	5

**Calendar** (including all subfolders)

Status: Expired

Shared by: Sandra Bullock

Shared on: 2022.02.21. 10:46:46

Expiration date: 2022.03.13. 23:59:59

Download limit: 20 per recipient

Download count: 0

Shared with: Recipients only

Recipient(s): jake.peralta@tech-arrow.com

Model: Email archive

[Folder sharing options](#)

The shared folders are listed under the **Shared with me** and **My Organization** folders (if the shar-



ing is active) and the My shares folder (always.

contentWEB / Sharing / jake.peralta@tech-arrow.com [Demo] Type search text here... Search (jake.peralta@tech-arrow.com [Demo]) English

- Shared with me
- My shares
- Calendar
- Chats
- Deleted Items
- DemoDocLib
- Diacritics
- Discussion
- Documents
- Documents vol2
- Drafts
- Files

File name	Shared by	Shared on	Expiration date	Status	Referenced model	Download limit
contentACCESS	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
People working on common projects using Microsoft Teams as	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
third test message	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Second test message	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Test message	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Testing	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Testing	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Ten TV shows to watch in October Share using Email The Undoing	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
35 California fires August Complex CA 902.463 acres burned	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
https://www.latimes.com/wildfires-map/	jake.peralta@tech-	2022.02.03.	2022.02.03. 13:55:16	Expired	Teams archive	1
https://caea.tech-	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
https://demo-fulltext.tech-	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Bug related test message with attachments	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Test message for opening and downloading the attachments (bug)	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Franchise History	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Los Angeles Rams	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Lidar technology has revealed a whole new timeline of human	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1

**contentACCESS**

Status  
Expired

Shared by  
jake.peralta@tech-arrow.com

Shared on  
2022.02.03. 13:55:16

Expiration date  
2022.02.04. 23:59:59

Download limit  
1 per recipient

Download count  
1

Shared with  
Recipients only

Recipient(s)  
sandra.bullock@tech-arrow.com

Model  
Teams archive

Modify folder sharing options

---

**Download history**

Name	Download date	Device
sandra.bullock@tech-arrow.com	2022.02.03. 13:55:28	Windows computer

The download history is not available on the folder's preview, only on the items. The same goes for the Status tab. Here, the owner sees the status of the folder sharing, and because of this, the download history is not available neither on the folder's preview nor on the Status tab. The download history is available only on the items' preview in the shared folder.

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File name	Shared by	Shared on	Expiration date	Status	Referenced model	Download limit
contentACCESS	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
People working on common projects using Microsoft Teams as	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
third test message	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Second test message	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Test message	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Testing	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Testing	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Ten TV shows to watch in October Share using Email The Undoing	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
35 California fires August Complex CA 902.463 acres burned	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
https://www.latimes.com/wildfires-map/	jake.peralta@tech-	2022.02.03.	2022.02.03. 13:55:16	Expired	Teams archive	1
https://caea.tech-	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
https://demo-fulltext.tech-	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Bug related test message with attachments	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Test message for opening and downloading the attachments (bug)	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Franchise History	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Los Angeles Rams	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1
Lidar technology has revealed a whole new timeline of human	jake.peralta@tech-	2022.02.03.	2022.02.04.	Expired	Teams archive	1

**contentACCESS**

Status  
Expired

Shared by  
jake.peralta@tech-arrow.com

Shared on  
2022.02.03. 13:55:16

Expiration date  
2022.02.04. 23:59:59

Download limit  
1 per recipient

Download count  
1

Shared with  
Recipients only

Recipient(s)  
sandra.bullock@tech-arrow.com

Model  
Teams archive

Modify folder sharing options

---

**Download history**

Name	Download date	Device
sandra.bullock@tech-arrow.com	2022.02.03. 13:55:28	Windows computer



## Modify folder sharing options



Sharing options
Status

**Status:** Expired [1]

**Shared by:** Jake Peralta

**Shared on:** 2022.02.03.

**Expires on:** 2022.02.04.

**Download limit:** 1 per recipient

**Shared with:** Recipients only

**Shared items:**

Name	Status
<span style="color: #f7941d;">■</span> Posts	Expired

Close

## 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

The screenshot shows the contentACCESS Portal interface. On the left, a navigation pane includes 'Archive', 'Calendar', 'Deleted Items', 'Drafts', 'Inbox', 'Junk Email', and 'Sent Items'. The main area displays a list of email items with columns for Subject, Date, To, and Size. A context menu is open over the list, with the 'Legal hold' option highlighted in red. The context menu options include: 'Export selected message(s) as a PST file.', 'Export selected item(s) as a ZIP file.', 'Create report', 'Share', 'Recover selected item(s).', 'Mark document(s) for delete', and 'Legal hold'. On the right, a details pane shows the 'From' and 'To' fields, an 'Expiration date' of 2022.06.29, and a 'Start date' of 2021.06.07. A 'Message' button is visible at the bottom of the details pane.



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

### Manage legal hold case ✕

**Create new legal hold case** | Update existing legal hold case

Name:\*

Description:

Never expires

Expiration date:

All items (9 items)

Selected item(s) (2 items)



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 contentACCESS Portal).

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**.

Manage legal hold case

Create new legal hold case Update existing legal hold case

You are going to add documents to an existing legal hold case. Select necessary information to update legal hold case

Legal hold case:\* FA index test

All items (9 items)

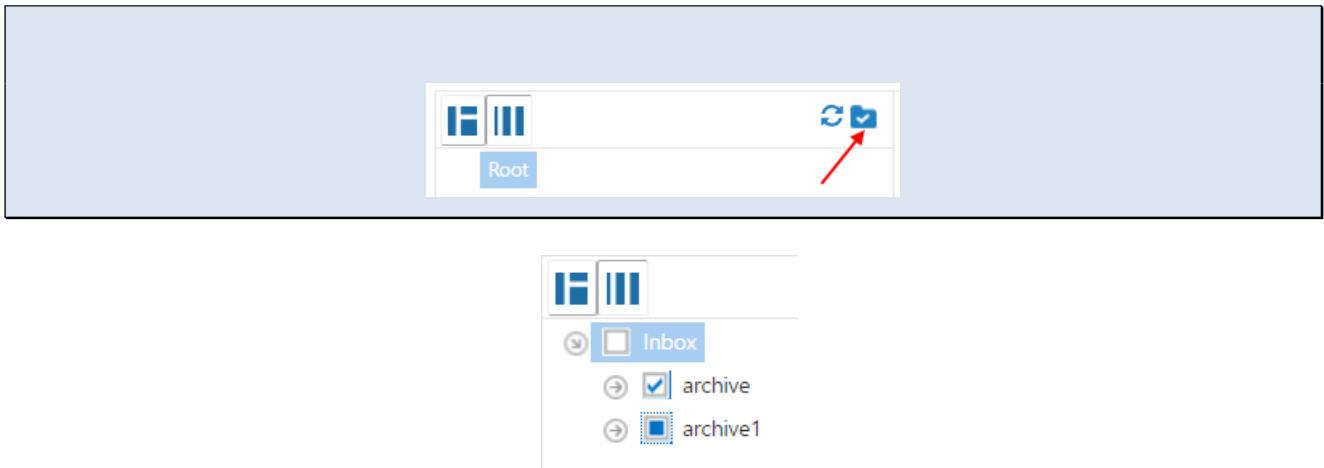
Selected item(s) (2 items)

Save Cancel





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.



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 3 actions. In the upper left 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.

Name	Expiration date	Status	Creation date	Deleted	Action
Test	Never expires	Waiting	6/29/2022 4:30:41 PM	No	2)
SPA legal hold 2	6/30/2022	Finished	6/27/2022 11:48:53 AM	No	
SPA legal hold	Never expires	Finished	6/27/2022 11:47:27 AM	No	
FSA legal hold 2	Never expires	Finished	6/27/2022 11:36:16 AM	No	
EA LegalHold	Never expires	Finished	6/1/2022 12:15:02 PM	No	3)

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.

contentACCESS Portal / Legal hold / SPA legal hold 2

**SPA legal hold 2**

**Description:** Test for delete from LH v... **Total tasks:** 3  
**Expiration date:** 6/30/2022 **Finished tasks:** 3  
**Creation date:** 6/27/2022 11:48:53 AM **Running tasks:** 0  
**Status:** Finished **Tasks with error:** 0

Task type	Name	Creation date	Status	Action
Add folders		6/27/2022 11:48:53 AM	Done	
Remove items		6/27/2022 1:07:24 PM	Done	
Remove items		6/27/2022 1:08:04 PM	Done	

Items: 0/14

Name	Folder	Entity	Date	Action
BBC_Culture_Style_Stunning_images_of_elegance_and_str...	https://techarrow.sharepoint.com/sites/DEMO/Shared D...	DEMO	5/28/2021	
BBC_News_Culture_The_TV_shows_that_reveal_the_real_F...	https://techarrow.sharepoint.com/sites/DEMO/Shared D...	DEMO	5/28/2021	
Čemák asistoval pri výhre. Tampa je bližšie k finále.docx	https://techarrow.sharepoint.com/sites/DEMO/Shared D...	DEMO	6/29/2021	
Čemákov prvý gól v play off Úvodný duel finále patril Ta...	https://techarrow.sharepoint.com/sites/DEMO/Shared D...	DEMO	6/29/2021	
EURO-2020 Sväzc büntetökkel búcsúztatta a világbajnok f...	https://techarrow.sharepoint.com/sites/DEMO/Shared D...	DEMO	6/29/2021	
Hóseğ- és zivatarveszély miatt riasztás és vörös figyelme...	https://techarrow.sharepoint.com/sites/DEMO/Shared D...	DEMO	6/29/2021	
Malibu.docx	https://techarrow.sharepoint.com/sites/DEMO/Shared D...	DEMO	9/29/2020	
Marie Curie.docx	https://techarrow.sharepoint.com/sites/DEMO/Shared D...	DEMO	9/29/2020	
Moana_Your_welcome_lyrics_english_Dwayne_Johnson.txt	https://techarrow.sharepoint.com/sites/DEMO/Shared D...	DEMO	5/28/2021	
Őrült hóseğrekordok repkednek Amerikában.docx	https://techarrow.sharepoint.com/sites/DEMO/Shared D...	DEMO	6/29/2021	
Őrült hóseğrekordok repkednek Amerikában.pdf	https://techarrow.sharepoint.com/sites/DEMO/Shared D...	DEMO	6/29/2021	
Tabernacle of the Linaolli.pdf	https://techarrow.sharepoint.com/sites/DEMO/Shared D...	DEMO	9/29/2020	
The_lion_king_Circle_of_life_lyrics_english.txt	https://techarrow.sharepoint.com/sites/DEMO/Shared D...	DEMO	5/28/2021	
Vivaldi.docx	https://techarrow.sharepoint.com/sites/DEMO/Shared D...	DEMO	9/29/2020	

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.



## Task details



**Task type:** Export items

**Creation date:** 5/19/2017

**Status:** Done

Close

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 contentACCESS Portal 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.

Items: 0/3					Search <input type="text"/>
1	2	3			
Name	Folder	Entity	Date	Action	
close to the edge	Inbox\archive	[blurred]	5/11/2017	4 →	↓
over and over	Inbox\archive	[blurred]	5/11/2017	↓	← 5
never look back	Inbox\archive	[blurred]	5/11/2017	↓	↓

## 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.



**Export to zip** ✕

**Export:**  All items (2 items)  
 Selected item(s) (1 items)

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.

demanding our hero

**From** [redacted]  
**Date** 5/11/2017 9:28:21 AM  
**To** [redacted]

---

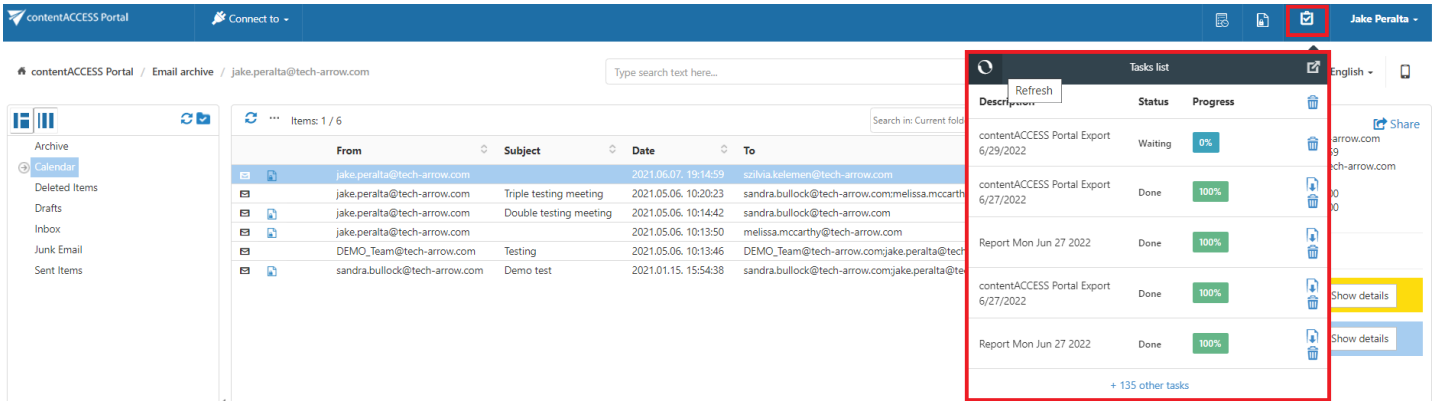
Message

Item is under legal hold

Demanding our hero  
 We're crying for help  
 If time won't save us  
 Can we save ourselves

## 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 contentACCESS Portal to expand the list of tasks:













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

Tasks list			
Description	Status	Progress	
ZIP export evening	Running	19%	
Export Tue Jun 19 2018	Done	100%	
Export ZIP	Done	100%	
Export ZIP Tue Jun 19 2018	Done	100%	
Report Mon Jun 18 2018	Done	100%	
+ 10 other tasks			

Screenshot: Cancelling an export task



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

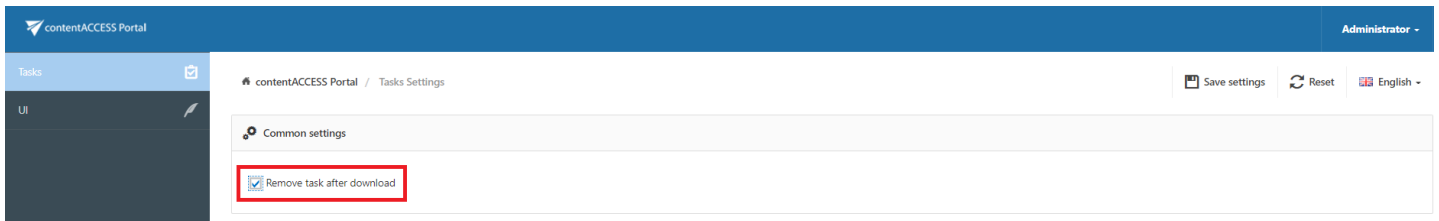
tasks can be here. The can be deleted from the tasks list one-by-one by clicking on the recycle bin mark in the respective row. exported from the


Tasks list			
Description	Status	Progress	
ZIP export evening	Running	19%	 
Export Tue Jun 19 2018	Done	100%	 
Export ZIP	Done	100%	 
Export ZIP Tue Jun 19 2018	Done	100%	 
Report Mon Jun 18 2018	Done	100%	 

+ 10 other tasks

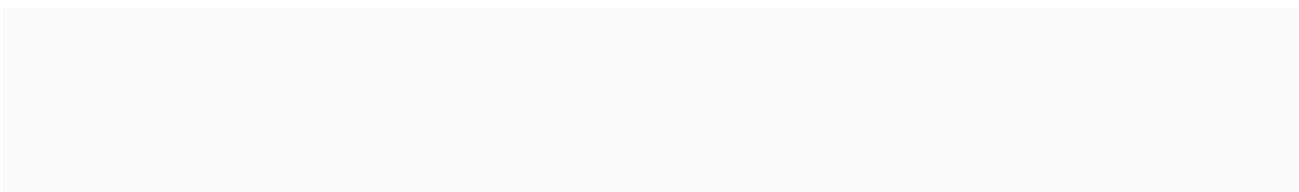
Screenshot: Download and deletion of the tasks

contentACCESS Portal 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



contentACCESS Portal / Tasks list English

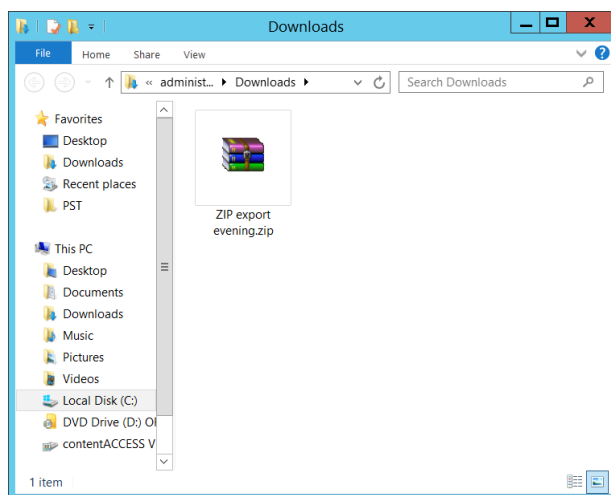
contentACCESS Portal Export 6/29/2022 Done 4:39 PM   100%	contentACCESS Portal Export 6/27/2022 Done 9:48 AM   100%
Report Mon Jun 27 2022 Done 9:41 AM   100%	contentACCESS Portal Export 6/27/2022 Done 9:41 AM   100%
Report Mon Jun 27 2022 Done 9:40 AM   100%	contentACCESS Portal Export 6/27/2022 Done 9:40 AM   100%
Report Mon Jun 27 2022 Done 9:36 AM   100%	contentACCESS Portal Export 6/27/2022 Done 9:36 AM   100%

## 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:

Description	Status	Progress	
ZIP export evening	Done	100%	
Export Tue Jun 19 2018	Done	100%	
Export ZIP	Done	100%	
Export ZIP Tue Jun 19 2018	Done	100%	
Report Mon Jun 18 2018	Done	100%	

+ 10 other tasks



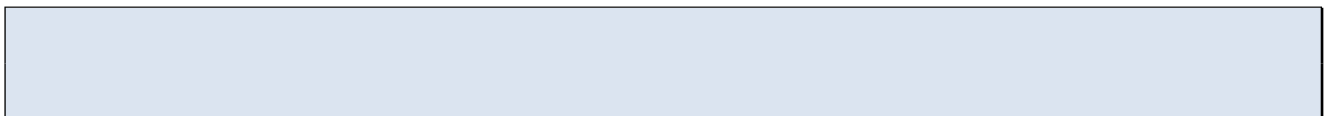
Screenshot A: Download of exported items

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 **Summary** tab the user may view the task summary information, the creation date and creator of the export action, the total number of the exported items;
- On the **Entity** tab (named after entity where the items were exported from) the user may find the title of the items, the item type, size and path of each item.







## ZIP export evening

Tenant:	<b>TECH-ARROW</b>
Created on:	<b>6/19/2018 5:12:06 PM</b>
Created by:	<b>Administrator</b>
Export from Entity: dne@ta.internal, Folder: CA recursively, Entity: dne@ta.internal, Folder: Deleted Items recursively, Export details: Entity: dne@ta.internal, Folder: Inbox recursively	

## Email archive

Number of items	<b>102</b>
-----------------	------------

Summary | Email archive

Email archive											
< Back to Summary											
Title	Type	Size	Path	Date	Subject	From	To	Message c	Has attach	Importanc	Mailbox
<a href="#">Pictures</a>	msg	132608	CA\AttachmentTest	2017-06-3	Pictures	/O=FIRST ( User1@m	IPM.Note	True	1	1	dne@ta.internal
<a href="#">Attach03</a>	msg	134144	CA\AttachmentTest	2017-06-3	Attach03	/O=FIRST ( User1@m	IPM.Note	True	1	1	dne@ta.internal
<a href="#">Attach02</a>	msg	132816	CA\AttachmentTest	2017-06-3	Attach02	/O=FIRST ( Aranka@n	IPM.Note	True	1	1	dne@ta.internal
<a href="#">Attach + body</a>	msg	86528	CA\AttachmentTest	2017-06-3	Attach + b	/O=FIRST ( User1@m	IPM.Note	True	1	1	dne@ta.internal
<a href="#">contentACCESS invitation</a>	msg	45056	Inbox\Emails to archive\Emails to pr	2017-12-1	contentAC	Administra	IPM.Note	False	1	1	dne@ta.internal
<a href="#">contentACCESS license error</a>	msg	45056	Inbox\Emails to archive\Emails to pr	2017-12-1	contentAC	Administra	IPM.Note	False	1	1	dne@ta.internal
<a href="#">contentACCESS license error</a>	msg	45056	Inbox\Emails to archive\Emails to pr	2017-12-1	contentAC	Administra	IPM.Note	False	1	1	dne@ta.internal
<a href="#">contentACCESS invitation</a>	msg	45056	Inbox\Emails to archive\Emails to pr	2017-12-0	contentAC	Administra	IPM.Note	False	1	1	dne@ta.internal
<a href="#">contentACCESS license error</a>	msg	45056	Inbox\Emails to archive\Emails to pr	2017-12-0	contentAC	Administra	IPM.Note	False	1	1	dne@ta.internal
<a href="#">Word document</a>	msg	36864	Inbox\Emails to archive\Emails to pr	2017-07-0	Word docu		IPM.Note	True	1	1	dne@ta.internal
<a href="#">Edgewave ThreatTest voted as one of the most promising MS</a>	msg	585728	Inbox\Emails to archive\Emails with	2018-02-2	Edgewave		IPM.Note	True	1	1	dne@ta.internal
<a href="#">here's \$50 to sponsor your content on LinkedIn!</a>	msg	53248	Inbox\Emails to archive\Emails with	1753-01-0		linkedin@	IPM.Note	False	1	1	dne@ta.internal
<a href="#">Reminder: , your coupon is about to expire!</a>	msg	53248	Inbox\Emails to archive\Emails with	1753-01-0	Reminder:	linkedin@	IPM.Note	False	1	1	dne@ta.internal
<a href="#">Edgewave ThreatTest voted as one of the most promising MS</a>	msg	45056	Inbox\Emails to archive\Emails with	1753-01-0	Edgewave	techarrow	IPM.Note	False	1	1	dne@ta.internal

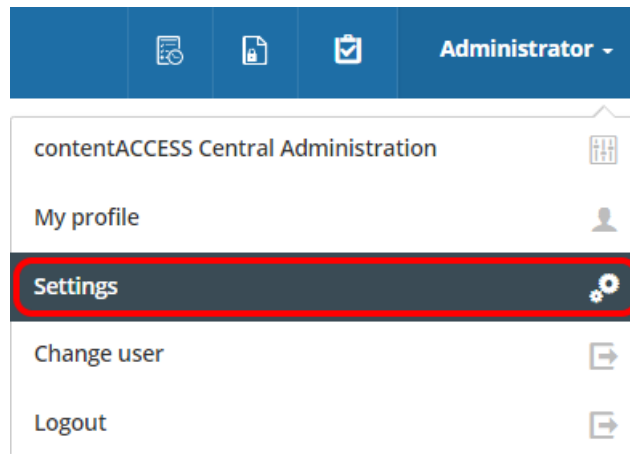
Summary | Email archive

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

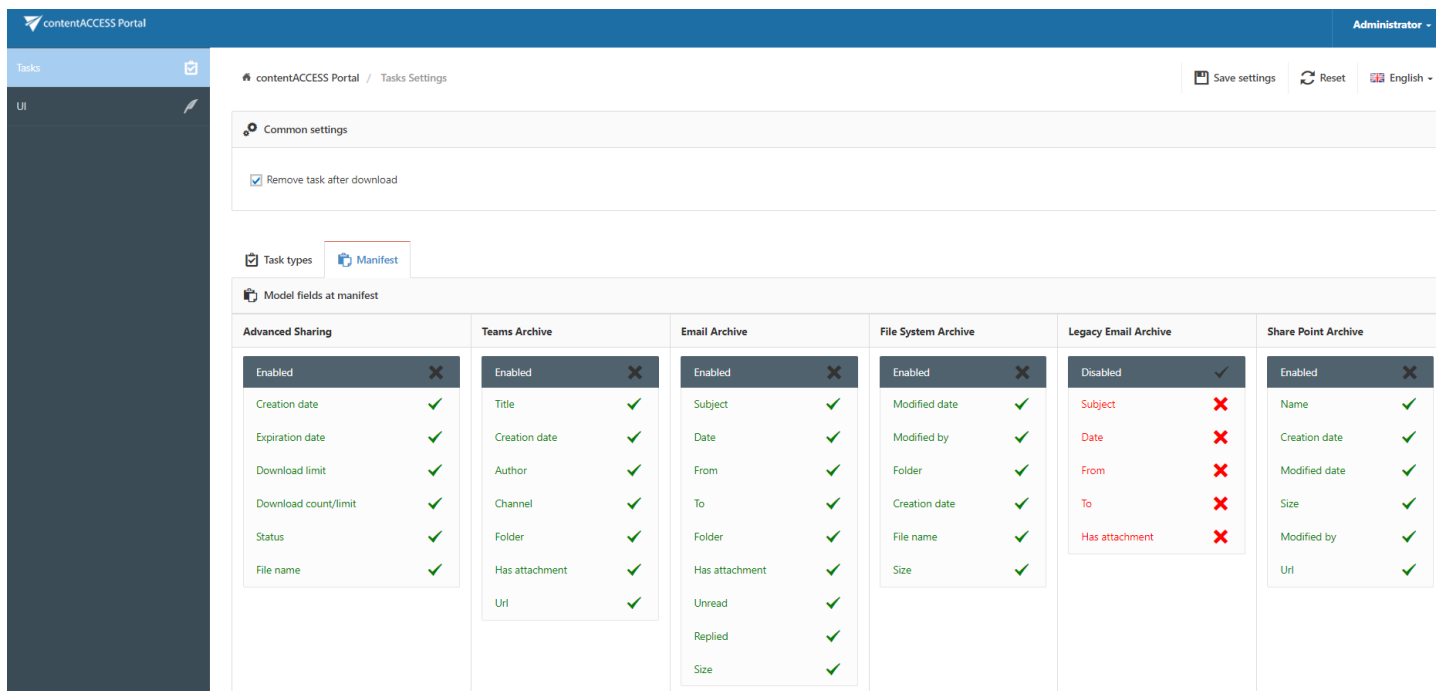
### Field settings in the manifest file

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.



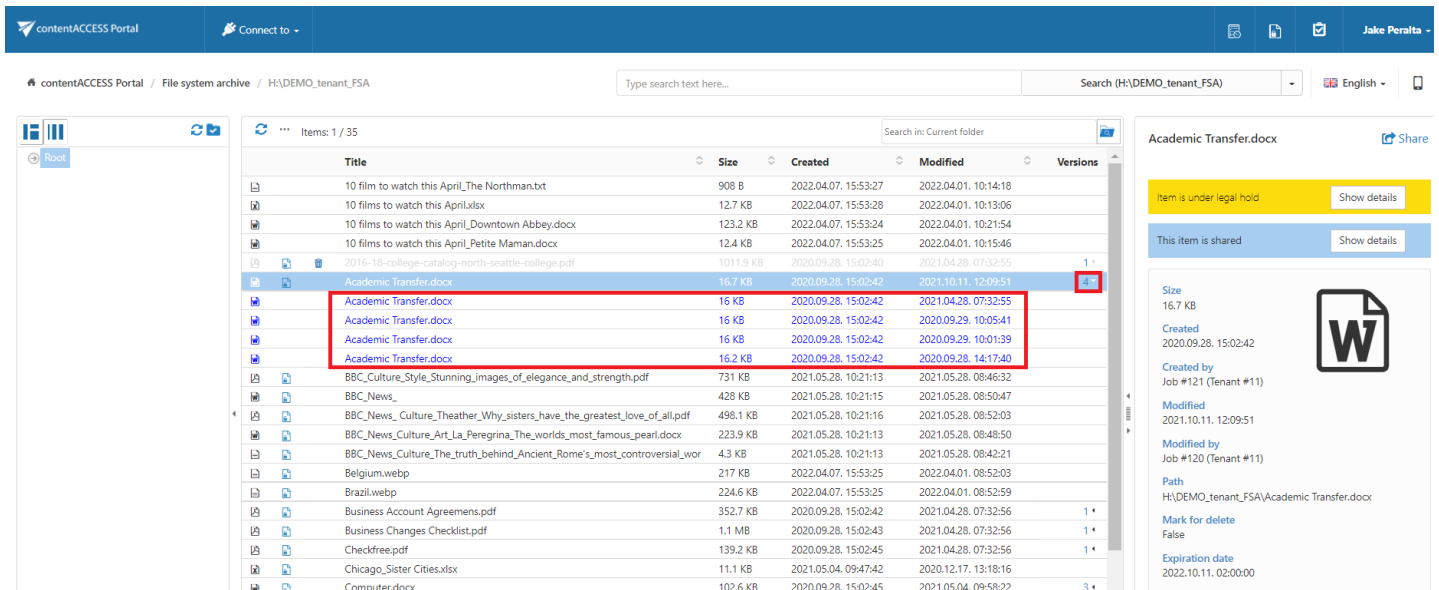
All available fields that can be displayed in the manifest file can be viewed here. Click on the cross **✗** mark ( ) next to the field to add it into the manifest. With clicking on the check mark **✓** ( ) you may disable the selected field again.

## File System Archive

contentACCESS Portal 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 contentACCESS Portal during the files' retention time.

## File versions

In contentACCESS Portal, 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 contentACCESS Portal, 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.



The screenshot shows the contentACCESS Portal interface. The main area displays a list of files in a table with columns: Title, Size, Created, Modified, and Versions. The file 'Academic Transfer.docx' is highlighted in blue, and its version count '1' is also highlighted. A red box highlights the version details for this file:

Title	Size	Created	Modified	Versions
Academic Transfer.docx	16 KB	2020.09.28. 15:02:42	2021.04.28. 07:32:55	1
Academic Transfer.docx	16 KB	2020.09.28. 15:02:42	2020.09.29. 10:05:41	
Academic Transfer.docx	16 KB	2020.09.28. 15:02:42	2020.09.29. 10:01:39	
Academic Transfer.docx	16.2 KB	2020.09.28. 15:02:42	2020.09.28. 14:17:40	

The right-hand pane shows details for the selected file 'Academic Transfer.docx', including its size (16.7 KB), creation and modification dates, and the user who created it (Job #121 (Tenant #11)).

## 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 contentACCESS Portal, 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 [Manual recovery](#) below).
- ✓ To avoid displaying duplicates by using the active/inactive filtering options in the archive.

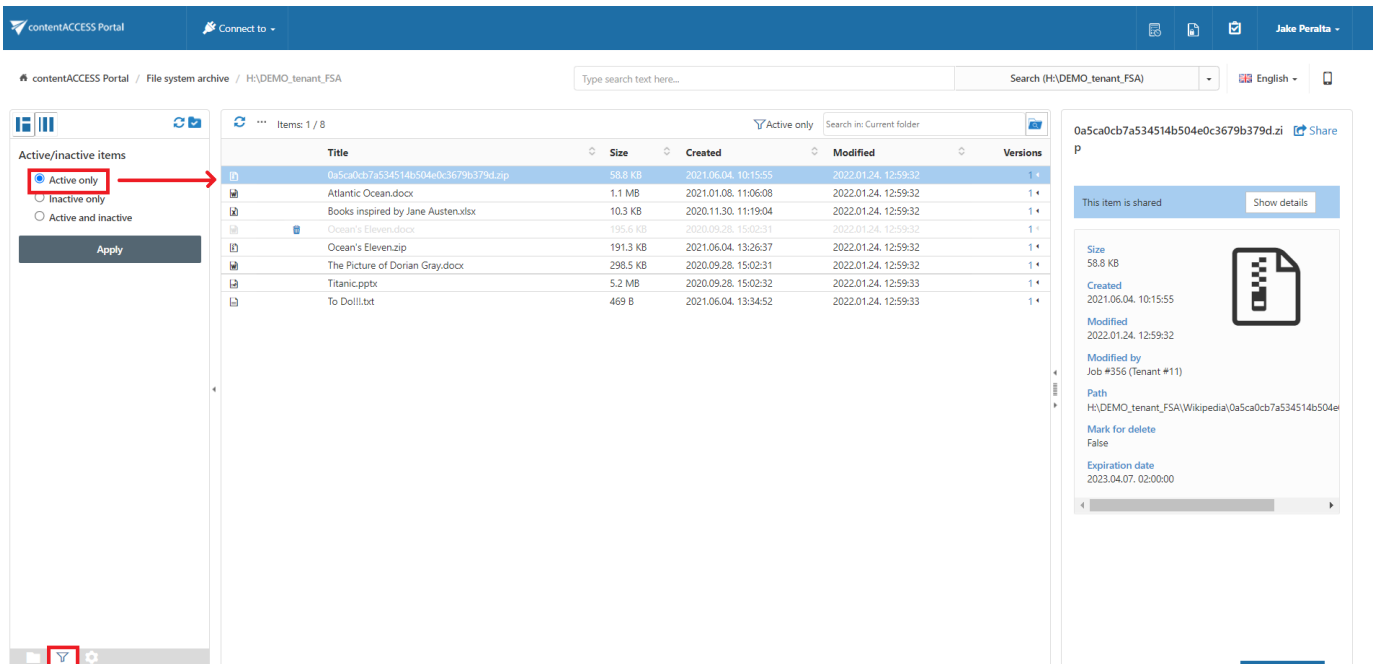


### How to filter between active/inactive items in the archive?

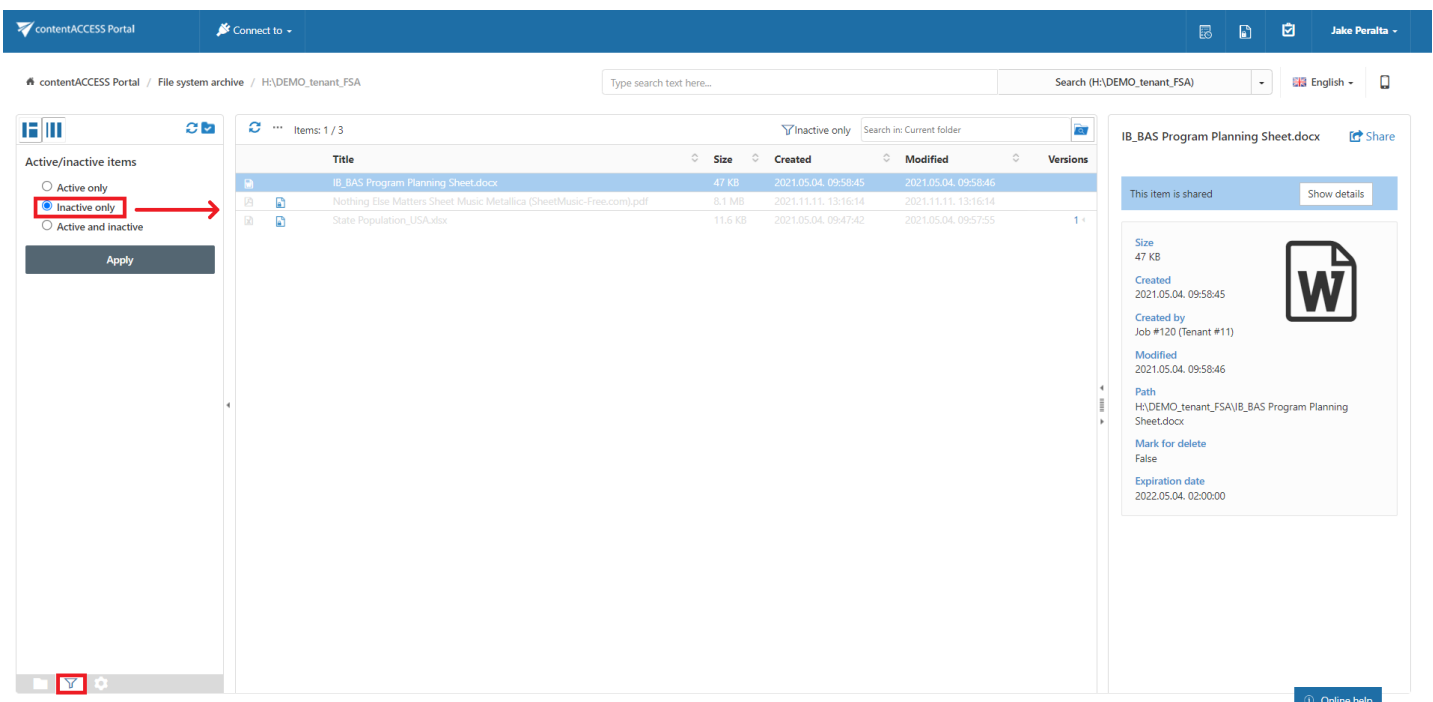
Our archive folder “**DEMO\_TENANT\_FSA**” on the below displayed screenshot contains both active and inactive items.

Title	Size	Created	Modified	Versions
<b>0a5ca0cb7a534514b504e0c3679b379d.zip</b>	58.8 KB	2021.06.04. 10:15:55	2022.01.24. 12:59:32	1
Atlantic Ocean.docx	1.1 MB	2021.01.08. 11:06:08	2022.01.24. 12:59:32	1
Books inspired by Jane Austen.xlsx	10.3 KB	2020.11.30. 11:19:04	2022.01.24. 12:59:32	1
My Documents.zip	3 MB	2022.02.03. 14:51:55	2022.02.03. 14:53:08	1
Nebraska.pdf	1.2 MB	2022.02.04. 12:50:26	2022.02.04. 14:19:40	1
Ocean's Eleven.docx	195.6 KB	2020.09.28. 15:02:31	2022.01.24. 12:59:32	1
Ocean's Eleven.zip	191.3 KB	2021.06.04. 13:26:37	2022.01.24. 12:59:32	1
The Picture of Dorian Gray.docx	298.5 KB	2020.09.28. 15:02:31	2022.01.24. 12:59:32	1
Titanic.pptx	5.2 MB	2020.09.28. 15:02:32	2022.01.24. 12:59:33	1
To Dell.txt	469 B	2021.06.04. 13:34:52	2022.01.24. 12:59:33	1

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



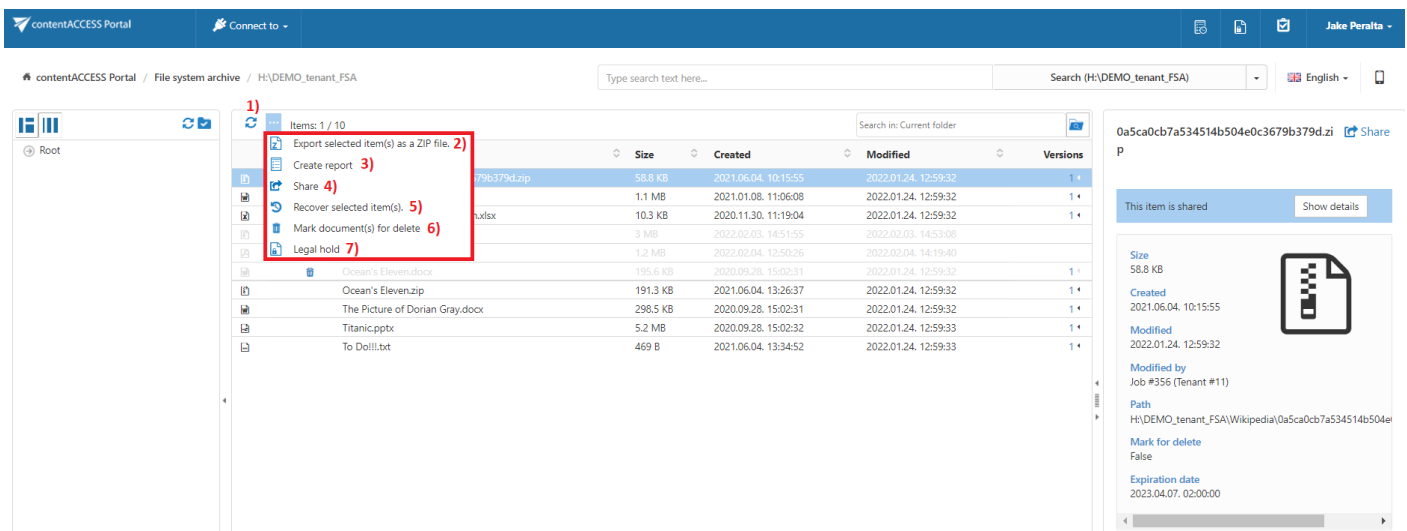
## Screenshot B: Inactive items of the folder

## 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 selected item(s) as a ZIP file
3. Create report
4. Share item(s)
5. Recover selected item(s)
6. Mark document(s) for delete
7. Legal hold

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



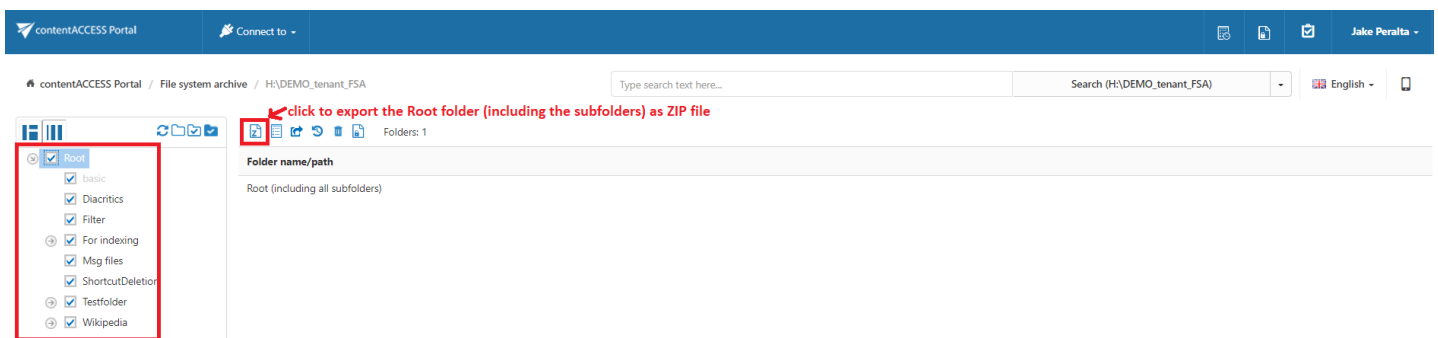
For more information refer to section [Folder selection methods](#).

## Refresh

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

## Export selected item(s) as a ZIP file

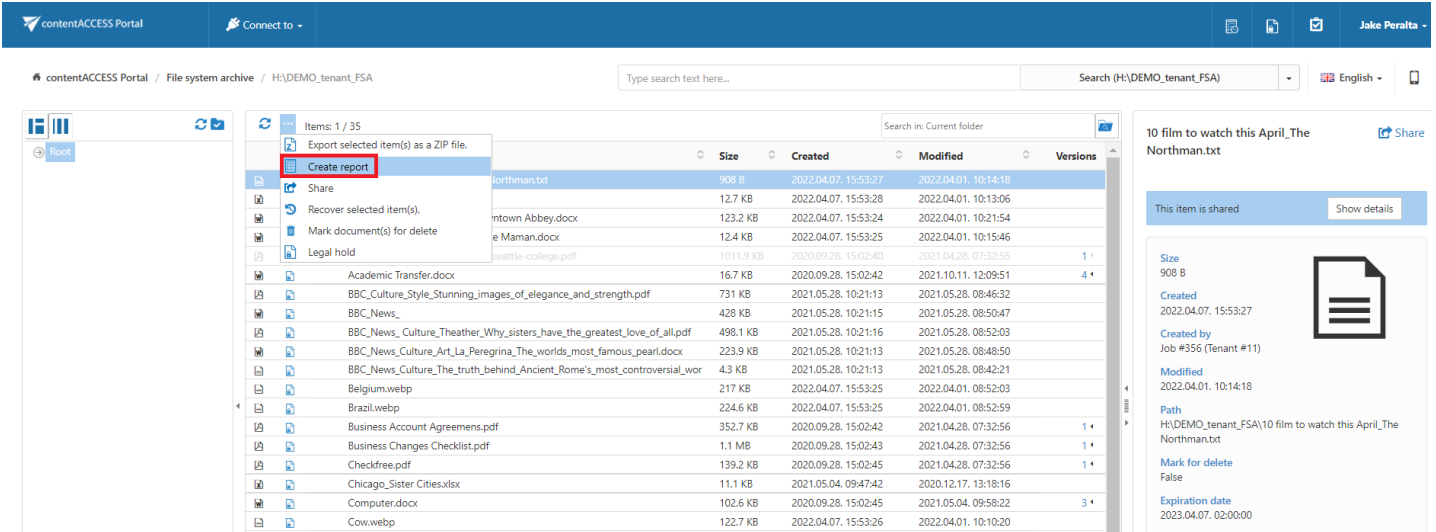
To export file archive item(s)/folder(s) as a ZIP file, select the desired item(s) from the list view (or select the node(s) in the left side pane) and click on the **Export selected item(s) as a ZIP file** button located above the list view. The exported items are zipped in the background (on the server 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](#)).

## Create report





The screenshot shows the contentACCESS Portal interface. At the top, there is a navigation bar with 'contentACCESS Portal', 'Connect to', and a user profile 'Jake Peralta'. Below this is a search bar and a language selector set to 'English'. The main area displays a file system archive for 'H:\DEMO\_tenant\_FSA'. A context menu is open over a file, with 'Create report' highlighted. The file list below shows columns for Name, Size, Created, Modified, and Versions. On the right, a preview pane shows details for a file named '10 film to watch this April\_The Northman.txt', including its size (908 B), creation date (2022.04.07. 15:53:27), and other metadata.

Name	Size	Created	Modified	Versions
10 film to watch this April_The Northman.txt	908 B	2022.04.07. 15:53:27	2022.04.01. 10:14:18	
123.2 KB	123.2 KB	2022.04.07. 15:53:28	2022.04.01. 10:13:06	
123.2 KB	123.2 KB	2022.04.07. 15:53:24	2022.04.01. 10:21:54	
12.4 KB	12.4 KB	2022.04.07. 15:53:25	2022.04.01. 10:15:46	
1011.9 KB	1011.9 KB	2020.09.28. 15:02:40	2021.04.28. 07:32:55	1
16.7 KB	16.7 KB	2020.09.28. 15:02:42	2021.10.11. 12:09:51	4
731 KB	731 KB	2021.05.28. 10:21:13	2021.05.28. 08:46:32	
428 KB	428 KB	2021.05.28. 10:21:15	2021.05.28. 08:50:47	
498.1 KB	498.1 KB	2021.05.28. 10:21:16	2021.05.28. 08:52:03	
223.9 KB	223.9 KB	2021.05.28. 10:21:13	2021.05.28. 08:48:50	
4.3 KB	4.3 KB	2021.05.28. 10:21:13	2021.05.28. 08:42:21	
217 KB	217 KB	2022.04.07. 15:53:25	2022.04.01. 08:52:03	
224.6 KB	224.6 KB	2022.04.07. 15:53:25	2022.04.01. 08:52:59	
352.7 KB	352.7 KB	2020.09.28. 15:02:42	2021.04.28. 07:32:56	1
1.1 MB	1.1 MB	2020.09.28. 15:02:43	2021.04.28. 07:32:56	1
139.2 KB	139.2 KB	2020.09.28. 15:02:45	2021.04.28. 07:32:56	1
11.1 KB	11.1 KB	2021.05.04. 09:47:42	2020.12.17. 13:18:16	
102.6 KB	102.6 KB	2020.09.28. 15:02:45	2021.05.04. 09:58:22	3
122.7 KB	122.7 KB	2022.04.07. 15:53:26	2022.04.01. 10:10:20	

Read more about this feature [here](#).

## 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 contentACCESS Portal 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:

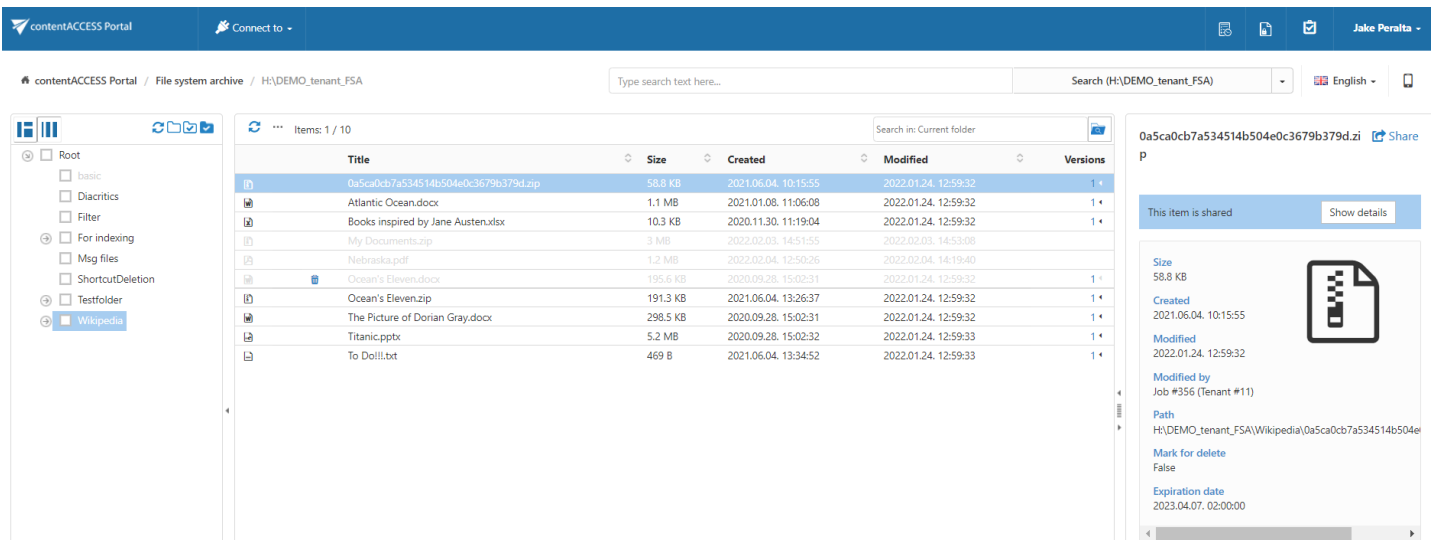
- One or multiple folders;
- Recursive folder structure;
- One or more folder contents.

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 the file **does not exist** in the folder and the LNK file (shortcut) also **does not exist** in the folder => the original file is recovered to the folder
- if the file **does not exist** in the folder BUT the LNK file (shortcut) **does exist** in the folder => the LNK (shortcut) is replaced with the original
- if the file **already exists** in the folder => nothing happens

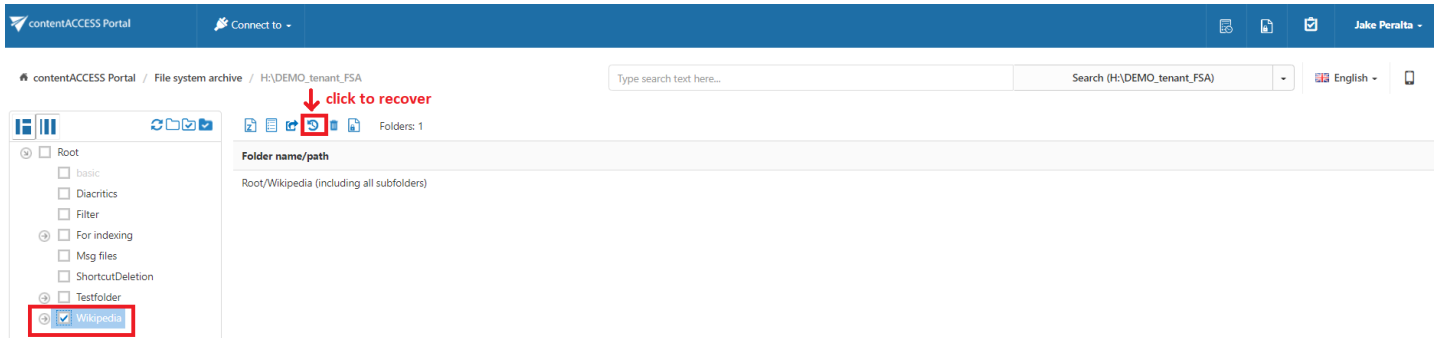
### Recovery of deleted items of folder "Wikipedia"

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



Title	Size	Created	Modified	Versions
0a5ca0cb7a534514b504e0c3679b379d.zip	58.8 KB	2021.06.04. 10:15:55	2022.01.24. 12:59:32	1
Atlantic Ocean.docx	1.1 MB	2021.01.08. 11:06:08	2022.01.24. 12:59:32	1
Books inspired by Jane Austen.xlsx	10.3 KB	2020.11.30. 11:19:04	2022.01.24. 12:59:32	1
My Documents.zip	3 MB	2022.02.03. 14:51:55	2022.02.03. 14:53:08	1
Nebraska.pdf	1.2 MB	2022.02.04. 12:50:26	2022.02.04. 14:19:40	1
Ocean's Eleven.docx	195.6 KB	2020.09.28. 15:02:31	2022.01.24. 12:59:32	1
Ocean's Eleven.zip	191.3 KB	2021.06.04. 13:26:37	2022.01.24. 12:59:32	1
The Picture of Dorian Gray.docx	298.5 KB	2020.09.28. 15:02:31	2022.01.24. 12:59:32	1
Titanic.pptx	5.2 MB	2020.09.28. 15:02:32	2022.01.24. 12:59:33	1
To Doll.txt	469 B	2021.06.04. 13:34:52	2022.01.24. 12:59:33	1

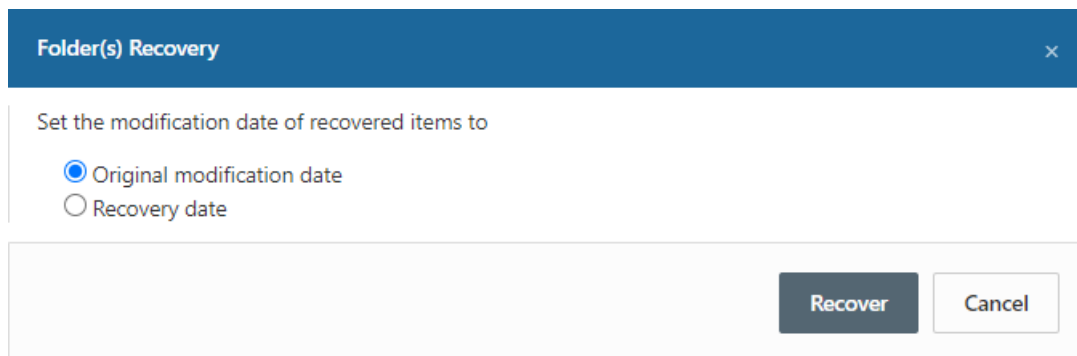
Now we want to have all deleted folder items (inactive documents) back in our file location. We check folder's check box in the navigation pane and we click on the recovery toolbar button above the list view:



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 be 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.

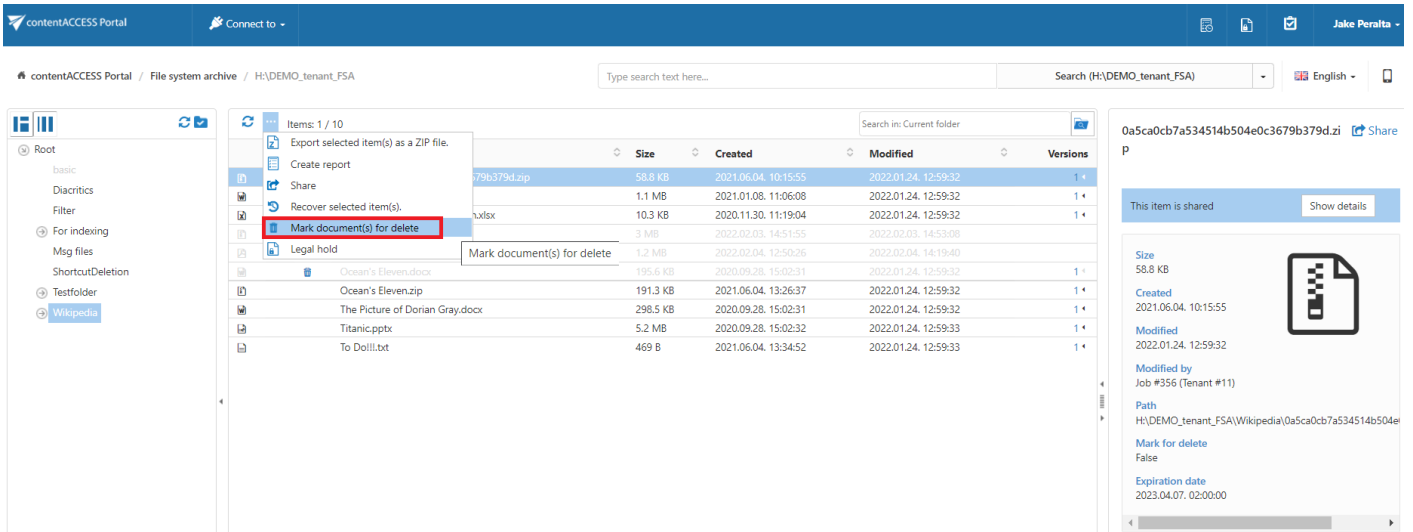
Once the files are recovered, they will be recolored to black in the contentACCESS Portal’s item’s grid.

### **Mark document(s) for delete**

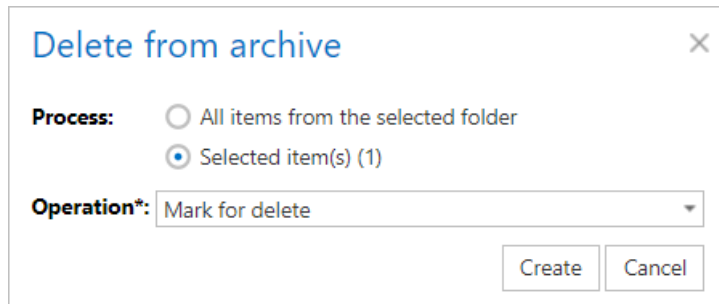
With this task you can mark/unmark documents to be later deleted from the archive by the [De-](#)



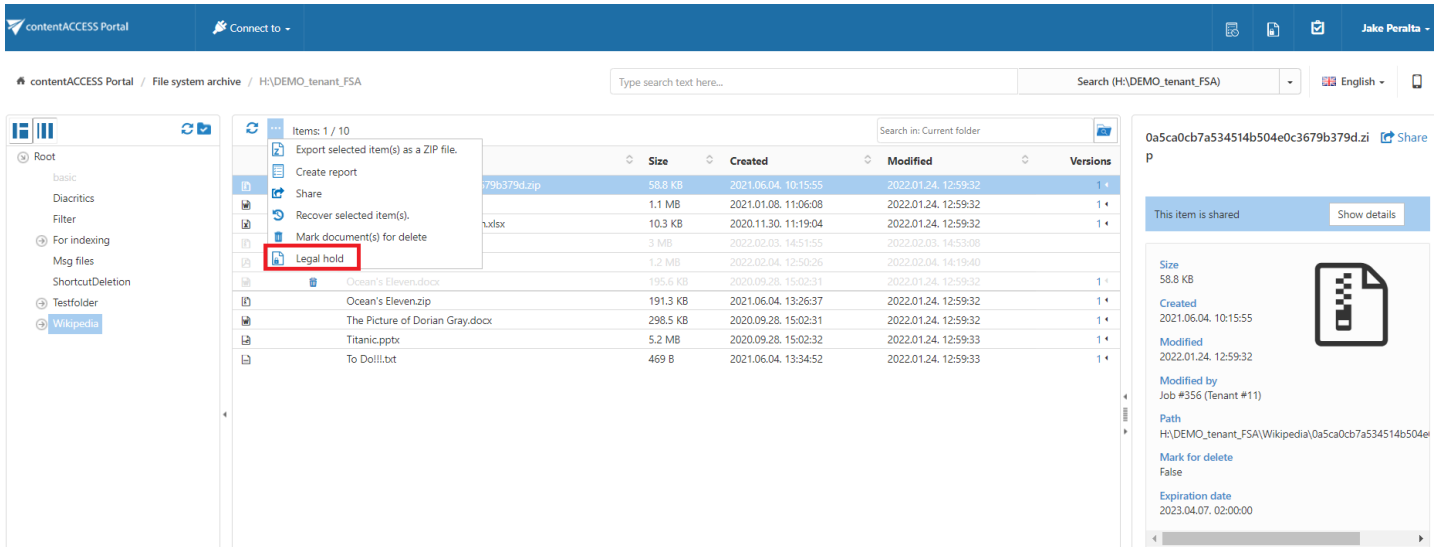
[lete job](#). You can either way mark/unmark only the selected files, or all files from the current folder.



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



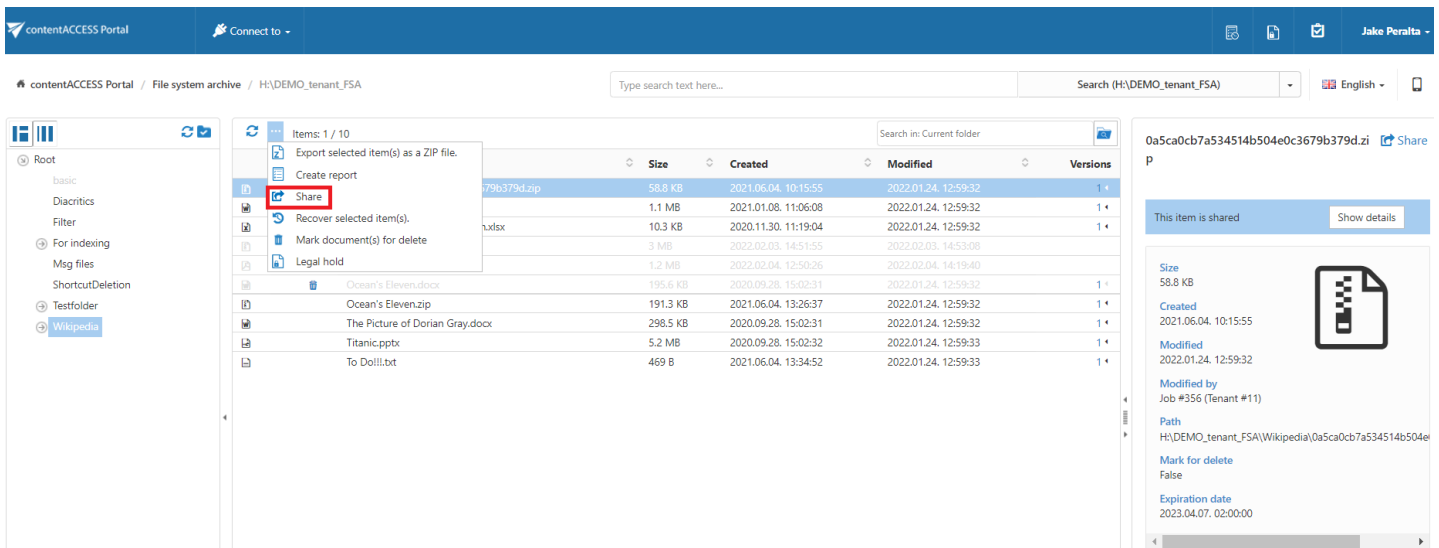
**Legal hold**



Read more about this feature [here](#).

### Share item(s)

With this option, you can easily share links pointing to the selected items, which can be later sent to other users.



Read more about this feature [here](#).

### Email Archive

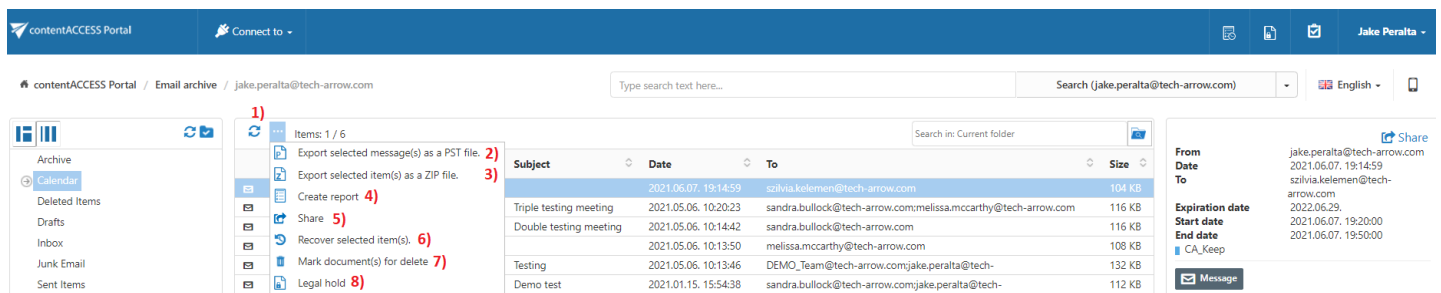
contentACCESS Portal is also a web user interface for the contentACCESS Email Archive. Emails and attachments archived by an Email Archive job can be accessed by an end user from contentACCESS Portal during the emails' retention time.

## 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 selected message(s) as a PST file
3. Export selected item(s) as a ZIP file
4. Create report
5. Share item(s)
6. Recover selected item(s)
7. Mark document(s) for delete
8. 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](#).



Subject	Date	To	Size
Triple testing meeting	2021.05.06. 10:20:23	sandra.bullock@tech-arrow.com;melissa.mccarthy@tech-arrow.com	116 KB
Double testing meeting	2021.05.06. 10:14:42	sandra.bullock@tech-arrow.com	116 KB
Testing	2021.05.06. 10:13:50	melissa.mccarthy@tech-arrow.com	108 KB
Testing	2021.05.06. 10:13:46	DEMO_Team@tech-arrow.com;jake.peralta@tech-	132 KB
Demo test	2021.01.15. 15:54:38	sandra.bullock@tech-arrow.com;jake.peralta@tech-	112 KB

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 selected message(s) as a PST file

To export one or multiple mailbox items/mailbox folders as a PST file, select the items from the item list/mailbox folders from the navigation pane. Now click on the **Export selected message(s) as a PST file** button located above the list view.

The screenshot shows the contentACCESS Portal interface. The navigation pane on the left lists folders like Archive, Deleted Items, Drafts, Inbox, Junk Email, and Sent Items. The main area displays a list of items with columns for Subject, Date, To, and Size. A context menu is open over the list, and the option 'Export selected message(s) as a PST file' is highlighted with a red box. The right-hand pane shows details for a selected message, including the sender (jake.peralta@tech-arrow.com), date (2021.06.07, 19:14:59), and legal hold information.

Subject	Date	To	Size
Triple testing meeting	2021.05.06. 10:20:23	sandra.bullock@tech-arrow.com;melissa.mccarthy@tech-arrow.com	116 KB
Double testing meeting	2021.05.06. 10:14:42	sandra.bullock@tech-arrow.com	116 KB
Testing	2021.05.06. 10:13:50	melissa.mccarthy@tech-arrow.com	108 KB
Demo test	2021.01.15. 15:54:38	DEMO_Team@tech-arrow.com;jake.peralta@tech-arrow.com;sandra.bullock@tech-arrow.com	132 KB

Choose if you want to export all items from the current folder, or only the selected items. Click on

**Create** or press enter.

### Export to PST ✕

**Name \*:**

**Export:**

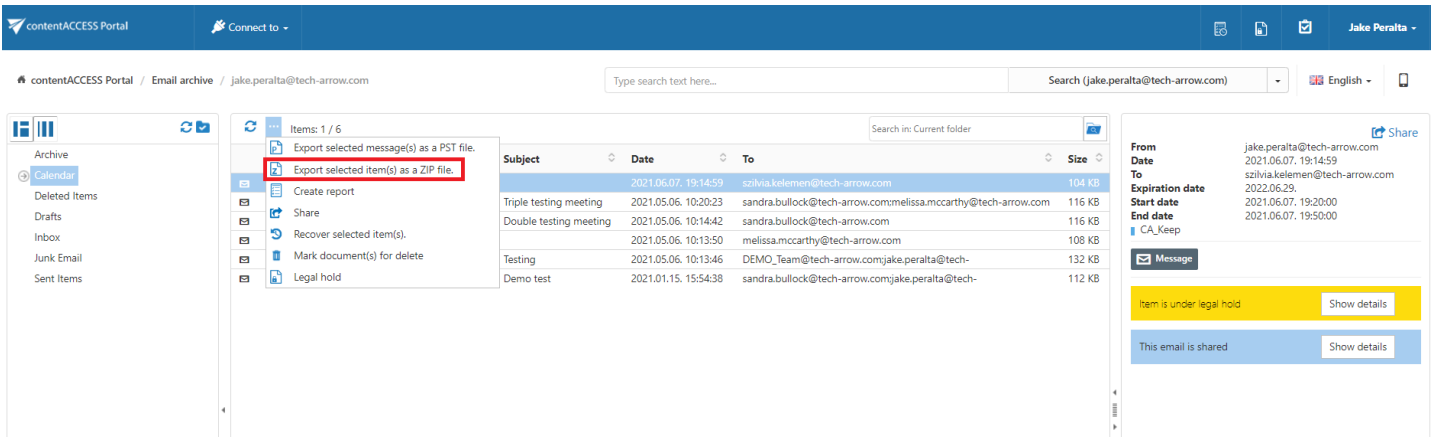
All items from the selected folder (3)

Selected item(s) (2)

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

### Export selected item(s) as a ZIP file

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 selected item(s) as a ZIP file** button located above the item list.



The screenshot shows the contentACCESS Portal interface. The top navigation bar includes 'contentACCESS Portal', 'Connect to', and the user name 'Jake Peralta'. Below the navigation bar, there is a search bar and a language selector set to 'English'. The main content area displays a list of items with columns for Subject, Date, To, and Size. A context menu is open over the list, and the option 'Export selected item(s) as a ZIP file' is highlighted with a red box. The right sidebar shows details for the selected item, including 'From', 'Date', 'Expiration date', 'Start date', 'End date', and 'CA\_Keep'.

Subject	Date	To	Size
Triple testing meeting	2021.06.07. 19:14:59	szilvia.kelemen@tech-arrow.com	104 KB
Double testing meeting	2021.05.06. 10:20:23	sandra.bullock@tech-arrow.com;melissa.mccarthy@tech-arrow.com	116 KB
Testing	2021.05.06. 10:13:50	melissa.mccarthy@tech-arrow.com	108 KB
Demo test	2021.05.06. 10:13:46	DEMO_Team@tech-arrow.com;jake.peralta@tech-arrow.com;sandra.bullock@tech-arrow.com	132 KB
	2021.01.15. 15:54:38	sandra.bullock@tech-arrow.com;jake.peralta@tech-arrow.com	112 KB

Choose if you want to export all items from the current folder, or only the selected items. Click on

**Create** or press enter.

### Export to zip ✕

**Name \*:**

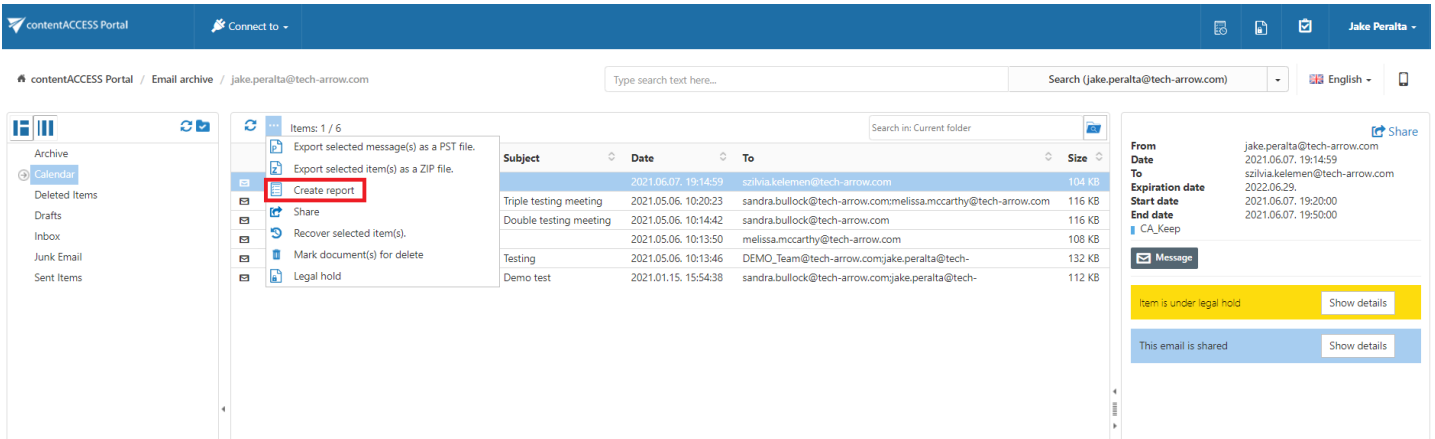
**Export:**

All items from the selected folder (3)

Selected item(s) (2)



## Create report

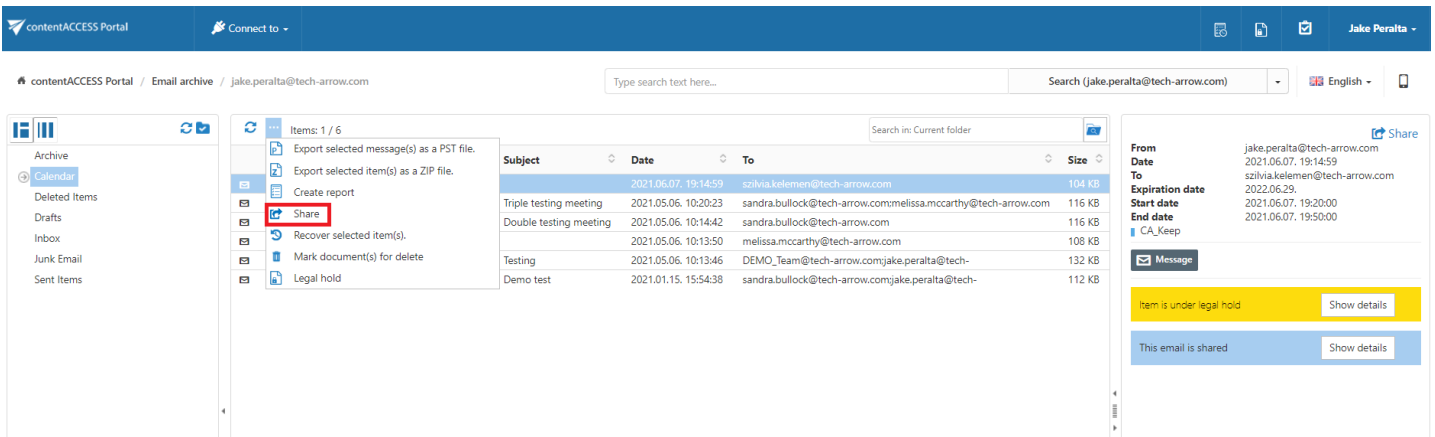


The screenshot shows the contentACCESS Portal interface. The left sidebar contains navigation options like Archive, Calendar, Deleted Items, Drafts, Inbox, Junk Email, and Sent Items. The main area displays a list of email items with columns for Subject, Date, To, and Size. A context menu is open over the selected items, with the 'Create report' option highlighted in red. The right sidebar shows the details of the selected email, including the sender (jake.peralta@tech-arrow.com), date (2021.06.07, 19:14:59), expiration date (2022.06.29), start date (2021.06.07, 19:20:00), end date (2021.06.07, 19:50:00), and a 'CA\_Keep' tag. There are also buttons for 'Message', 'Show details', and 'Share'.

Read more about this feature [here](#).

## Share item(s)

With this option, you can easily share links pointing to the selected items, which can be later sent to other users.



The screenshot shows the contentACCESS Portal interface, similar to the previous one. The context menu is open, and the 'Share' option is highlighted in red. The email details on the right sidebar are the same as in the previous screenshot, showing the sender, date, expiration date, start date, end date, and 'CA\_Keep' tag. The 'Share' button is visible in the top right corner of the email details panel.

Read more about this feature [here](#).

## Recover selected item(s)

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:

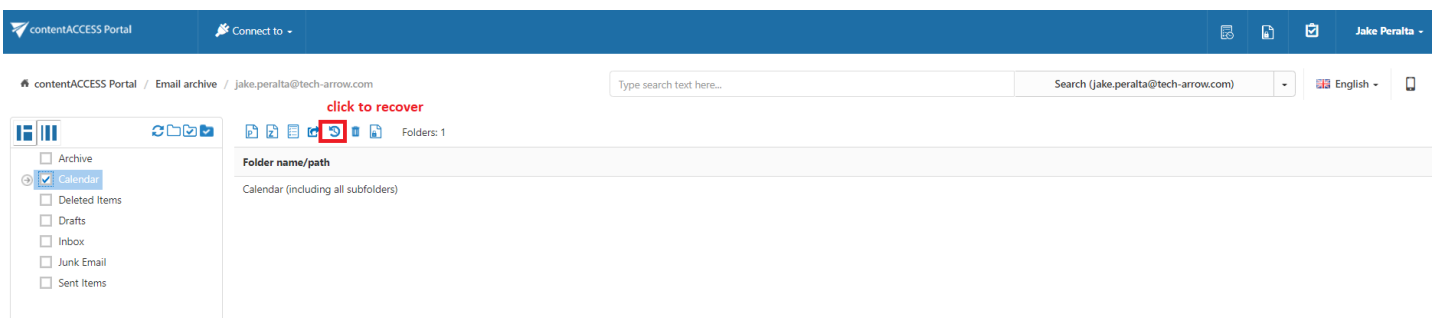
- One or multiple mailbox folders;
- Recursive folder structure;
- One or more folder contents.



- 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 document(s) 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.

The screenshot shows the contentACCESS Portal interface. On the left, the 'Calendar' folder is selected in the navigation pane. The main area displays a list of items with columns for Subject, Date, To, and Size. A toolbar above the list contains several actions, with 'Mark document(s) for delete' highlighted in red. The right pane shows details for a selected email, including 'From', 'Date', 'To', 'Expiration date', 'Start date', and 'End date'.

Subject	Date	To	Size
Triple testing meeting	2021.05.06. 10:20:23	sandra.bullock@tech-arrow.com:melissa.mccarthy@tech-arrow.com	116 KB
Double testing meeting	2021.05.06. 10:14:42	sandra.bullock@tech-arrow.com	116 KB
Testing	2021.05.06. 10:13:50	melissa.mccarthy@tech-arrow.com	108 KB
Demo test	2021.01.15. 15:54:38	sandra.bullock@tech-arrow.com:jake.peralta@tech-	112 KB

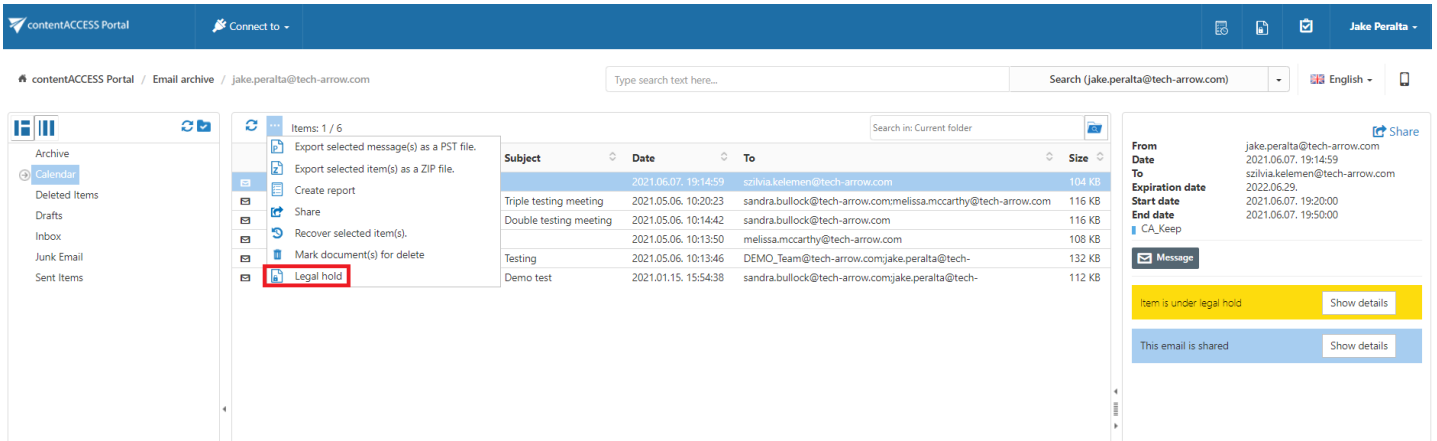
Select the desired action (mark or unmark) from the **Operation** dropdown list and then click **Create**.

### Delete from archive

**Process:**  All items from the selected folder  
 Selected item(s) (1)

**Operation\*:**

### Legal hold



Read more about this feature [here](#).

## GDPR Application

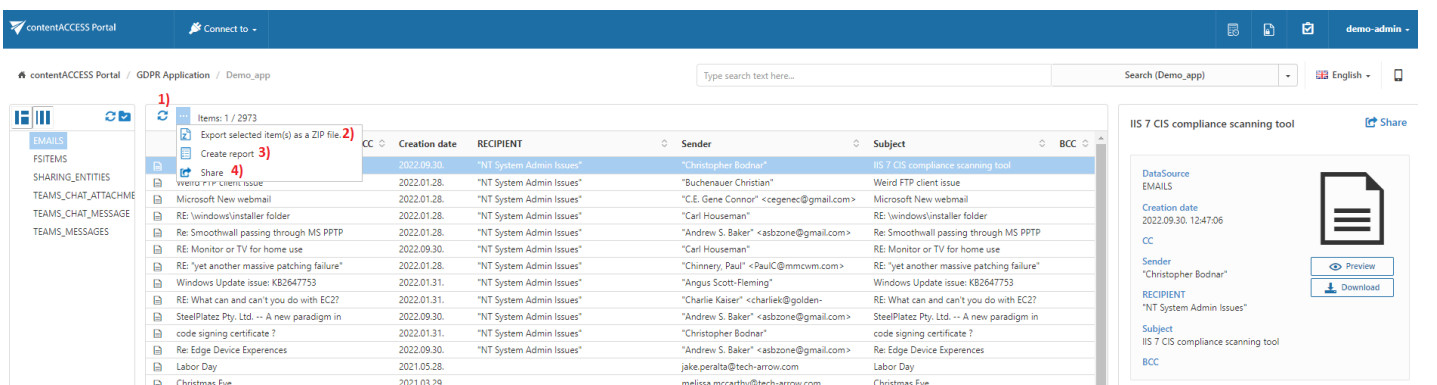
contentACCESS Portal is a web user interface for the GDPR Application. Data indexed by the GDPR Application job can be accessed by an end user from contentACCESS Portal during the item's retention time.

## GDPR Application tasks

By default, the following actions can be run on the selected GDPR Application data using the toolbar buttons:

1. Refresh
2. Export selected item(s) as a ZIP file
3. Create report Share

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





It is possible to select:

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

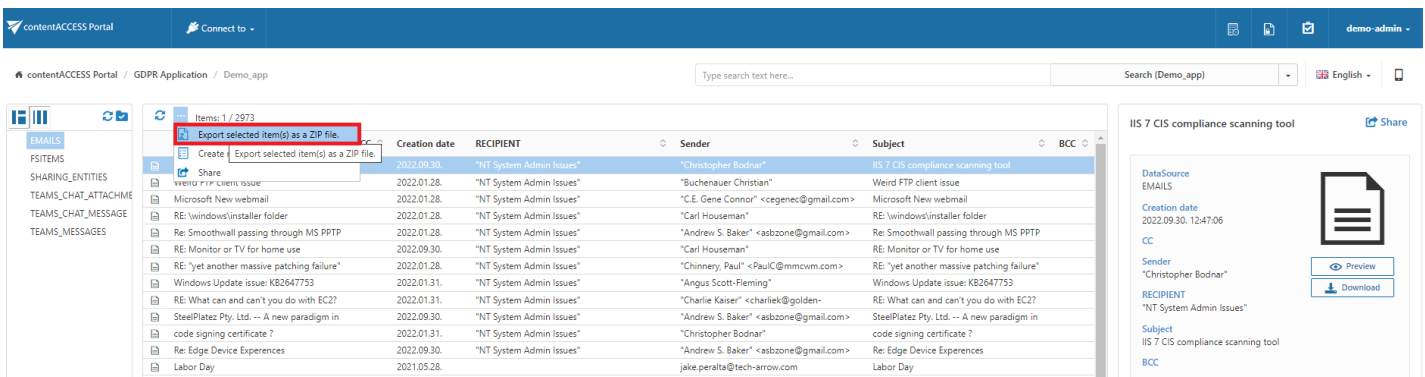
For more information refer to section [Folder selection methods](#).

### 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 selected item(s) as a ZIP file

To export one or multiple items/folders as a ZIP file, select the items from the item list/app folders from the navigation pane. Now click on the **Export selected item(s) as a ZIP file** button located above the list view.

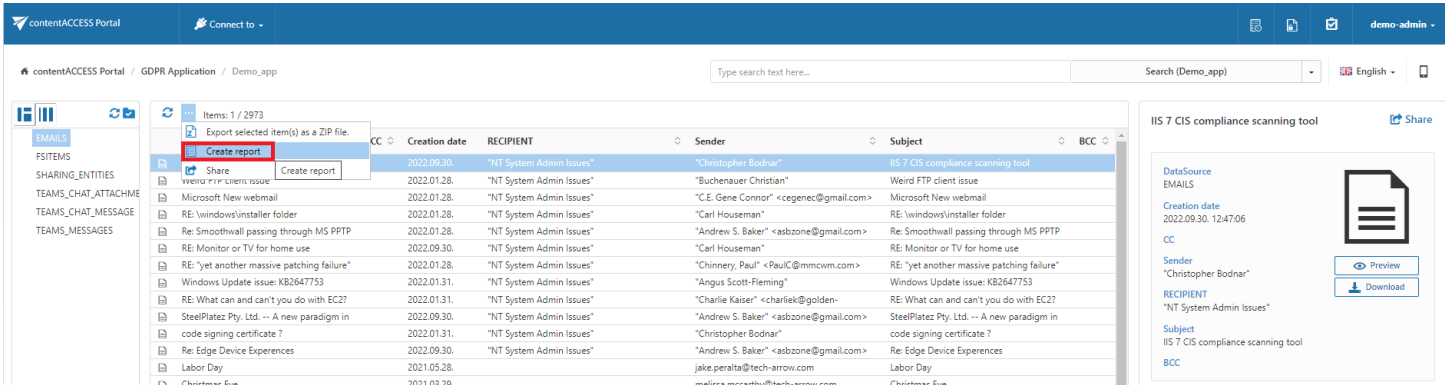


Choose if you want to export all items from the current folder or only the selected items. Click on **Create** or press enter.



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

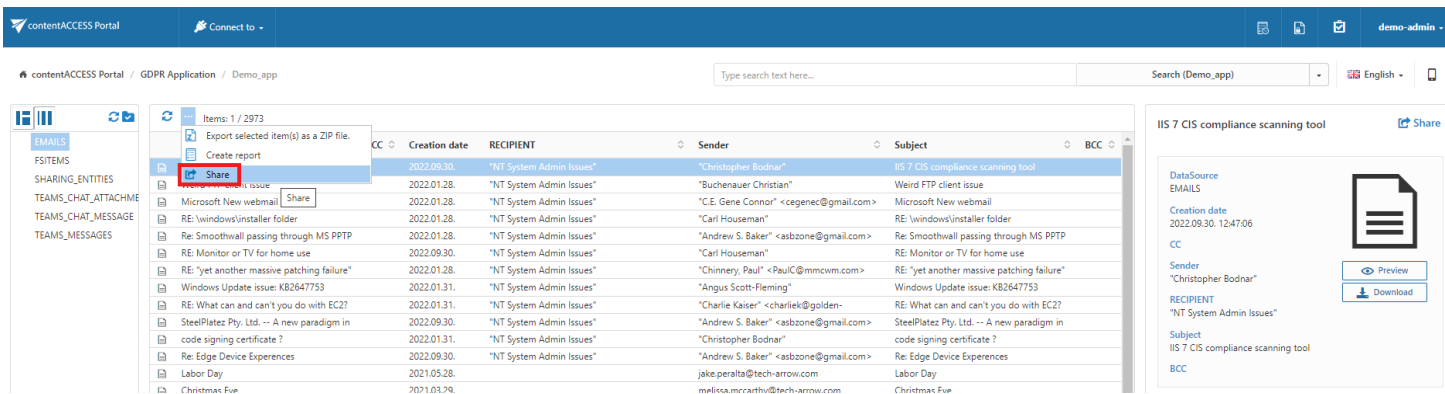
### Create report



Read more about this feature [here](#).

### Share item(s)

With this option, you can easily share links pointing to the selected items, which can be later sent to other users.



Read more about this feature [here](#).

## GDPR Exchange

contentACCESS Portal is also a web user interface for the GDPR Exchange. Emails indexed by the GDPR Exchange job can be accessed by an end user from contentACCESS Portal during the email's retention time.

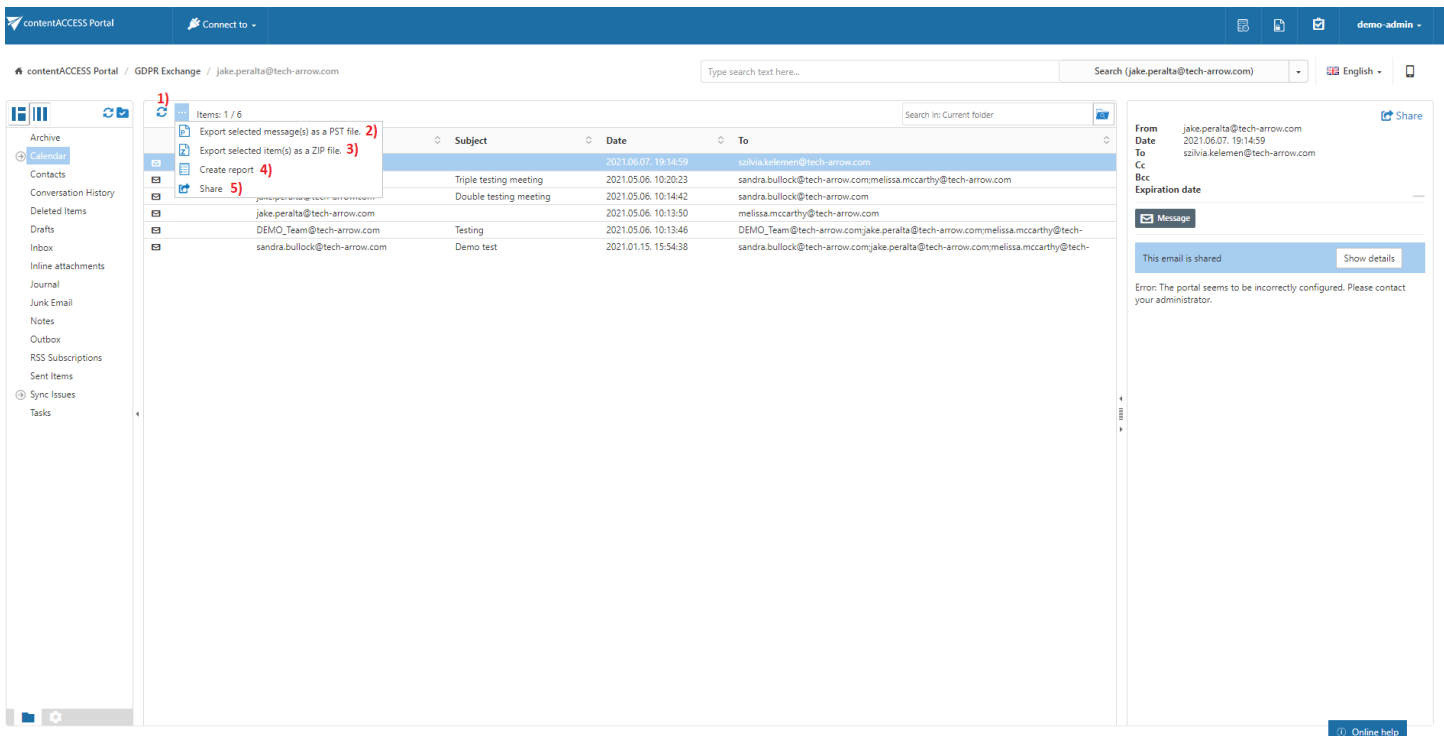
## GDPR Exchange tasks

By default, the following actions can be run on the selected GDPR Exchange items/folders using the toolbar buttons:

1. Refresh
2. Export selected message(s) as a PST file
3. Export selected item(s) as a ZIP file
4. Create report
5. Share

The GDPR Exchange tasks can be disabled/enabled in the Administrator's settings on the **Task types** tab.

For more information read the section [Enabling/disabling tasks](#).



The screenshot shows the contentACCESS Portal interface. The main area displays a list of items with columns for Subject, Date, and To. The toolbar above the list includes buttons for Refresh, Export selected message(s) as a PST file, Export selected item(s) as a ZIP file, Create report, and Share. The right sidebar shows the details of the selected item, including the sender (jake.peralta@tech-arrow.com), date (2021.06.07. 19:14:59), and a message body that contains an error: "Error: The portal seems to be incorrectly configured. Please contact your administrator."

Subject	Date	To
Triple testing meeting	2021.06.07. 19:14:59	szilvia.kelemen@tech-arrow.com
Double testing meeting	2021.05.06. 10:20:23	sandra.bullock@tech-arrow.com;melissa.mccarthy@tech-arrow.com
	2021.05.06. 10:14:42	sandra.bullock@tech-arrow.com
	2021.05.06. 10:13:50	melissa.mccarthy@tech-arrow.com
Testing	2021.05.06. 10:13:46	DEMO_Team@tech-arrow.com;jake.peralta@tech-arrow.com;melissa.mccarthy@tech-arrow.com
Demo test	2021.01.15. 15:54:38	sandra.bullock@tech-arrow.com;jake.peralta@tech-arrow.com;melissa.mccarthy@tech-arrow.com

It is possible to select:

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

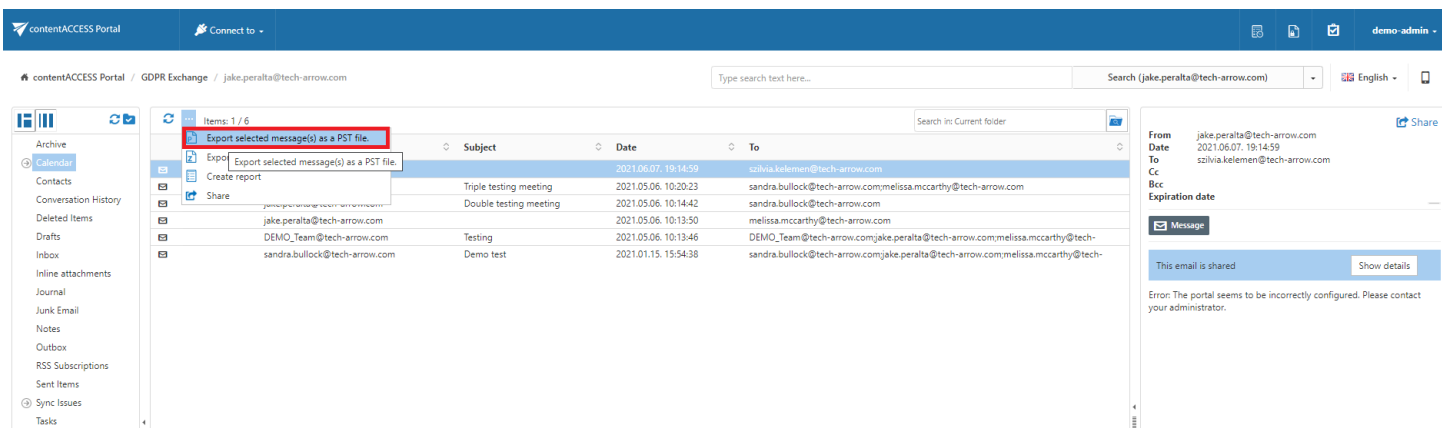
For more information refer to the section [Folder selection methods](#).

## 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 selected message(s) as a PST file

To export one or multiple mailbox items/mailbox folders as a PST file, select the items from the item list/mailbox folders from the navigation pane. Now click on the **Export selected message(s) as a PST file** button located above the list view.



Choose if you want to export all items from the current folder, or only the selected items. Click on **Create** or press enter.

### Export to PST ✕

**Name \*:**

**Export:**

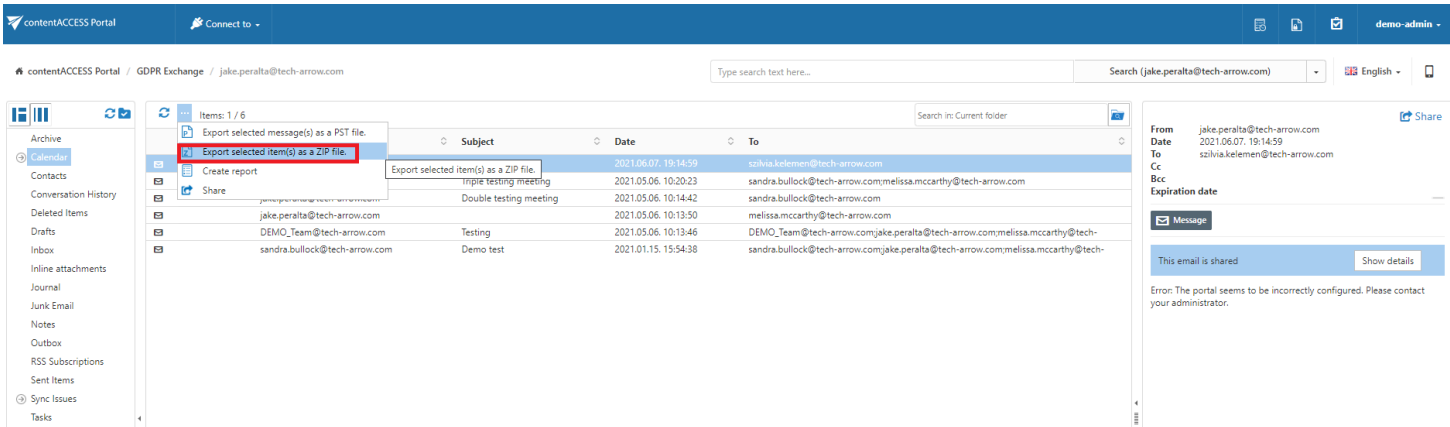
All items from the selected folder

Selected item(s) (1)

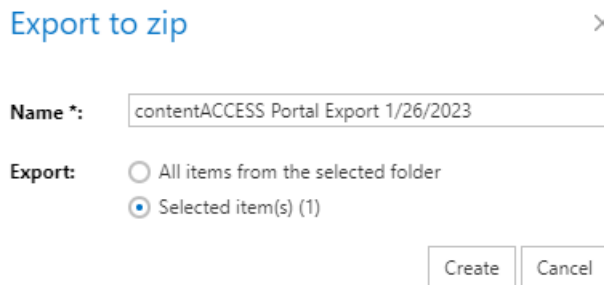
## Export selected item(s) as a ZIP file

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 selected item(s) as a ZIP file** button located above the item list.



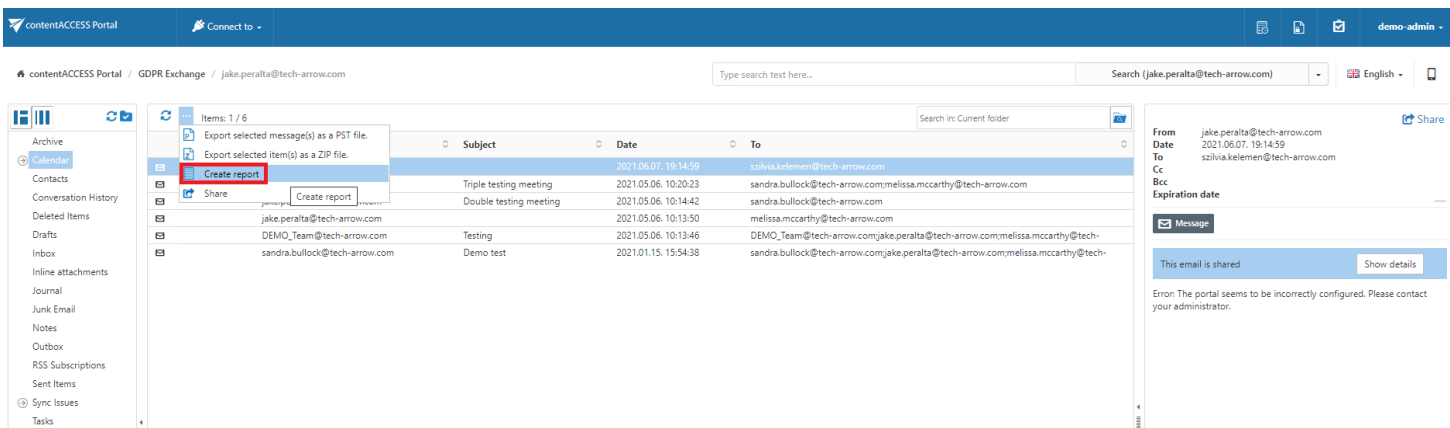


Choose if you want to export all items from the current folder or only the selected items. Click on **Create** or press enter.



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

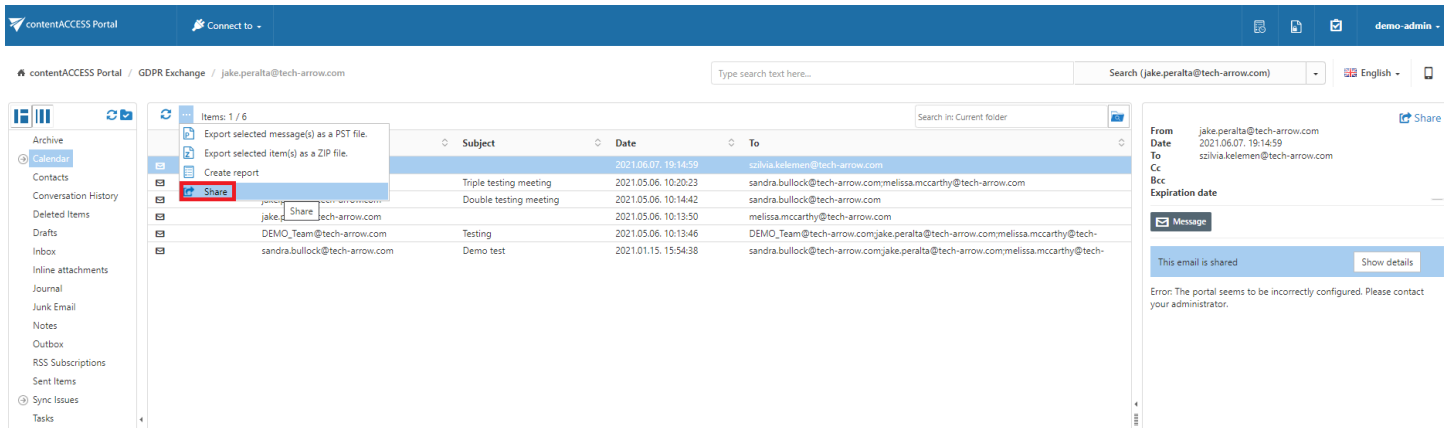
### Create report



Read more about this feature [here](#).

## Share item(s)

With this option, you can easily share links pointing to the selected items, which can be later sent to other users.



Read more about this feature [here](#).

## GDPR File system

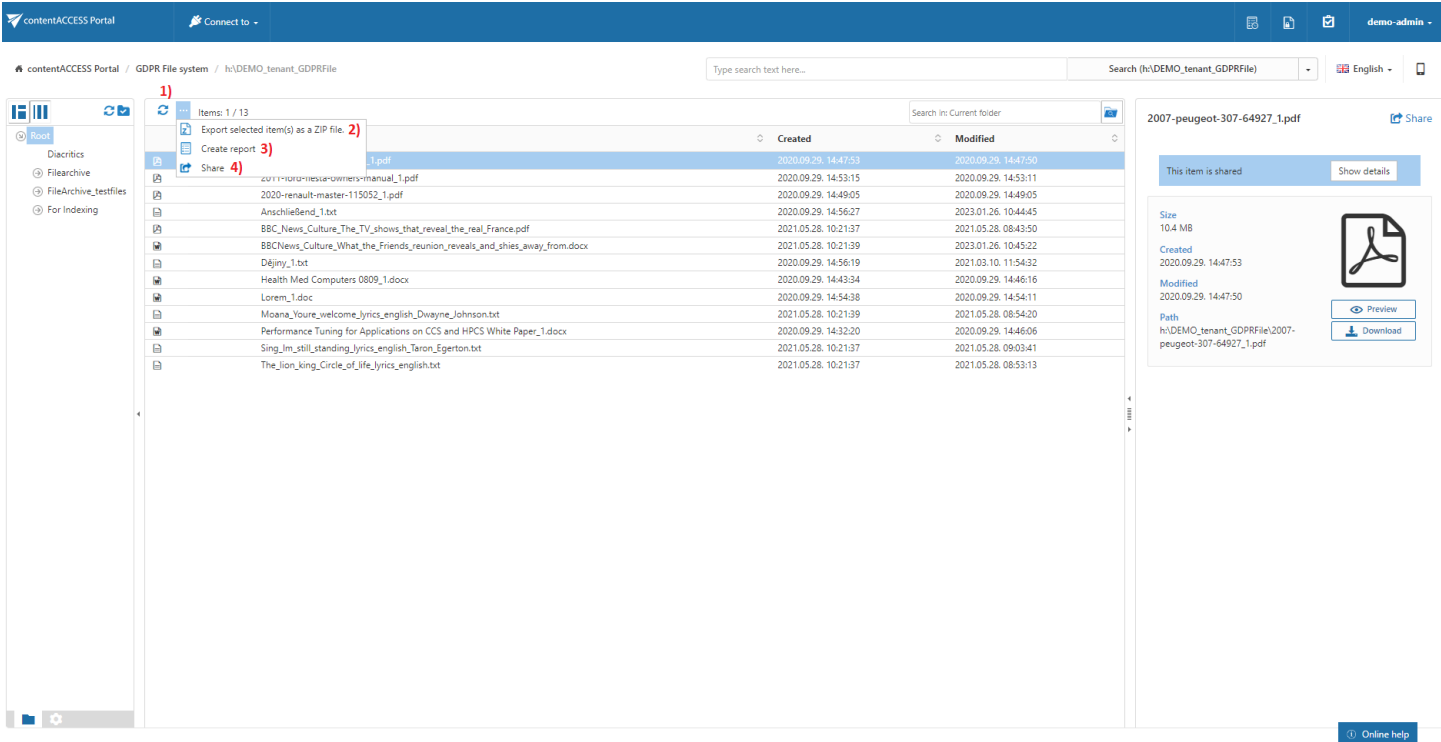
contentACCESS Portal is also a web user interface for the GDPR File system. Files indexed by the GDPR File system job can be accessed by an end user from contentACCESS Portal during the file's retention time.

## GDPR File system tasks

By default, the following actions can be run on the selected GDPR File system items/folders using the toolbar buttons:

1. Refresh
2. Export selected item(s) as a ZIP file
3. Create report
4. Share

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



The screenshot displays the contentACCESS Portal interface. The top navigation bar includes 'contentACCESS Portal', 'Connect to -', and 'demo-admin'. The main area shows a file list for the path 'h:\DEMO\_tenant\_GDPRFile'. The file list has columns for 'Created' and 'Modified' dates. A details pane on the right shows information for the file '2007-peugeot-307-64927\_1.pdf', including its size (10.4 MB), creation and modification dates, and options to 'Preview' or 'Download' the file. A toolbar above the file list contains icons for 'Export selected item(s) as a ZIP file', 'Create report', and 'Share'.

It is possible to select:

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

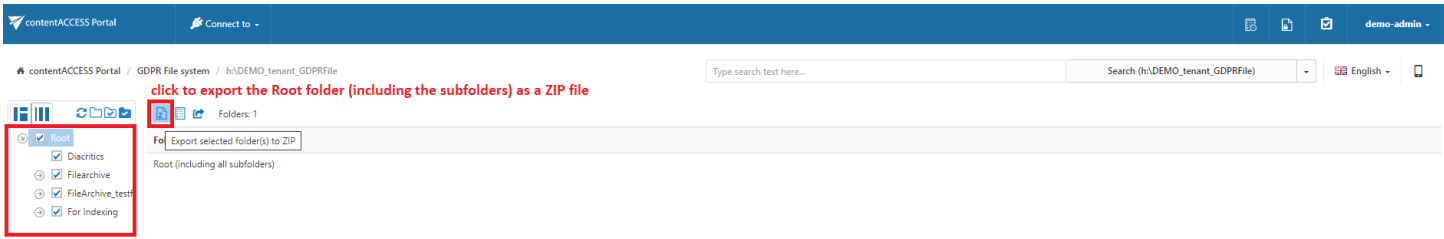
For more information refer to the section [Folder selection methods](#).

## 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.

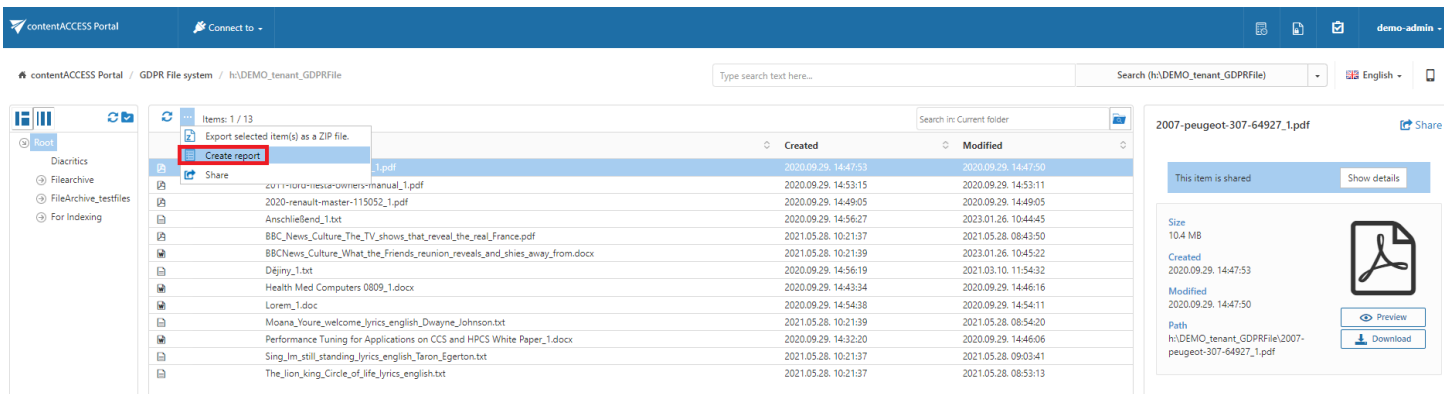
## Export selected item(s) as a ZIP file

To export GDPR File system item(s)/folder(s) as a ZIP file, select the desired item(s) from the list view (or select the node(s) in the left side pane) and click on the Export selected item(s) as a ZIP file 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 **Task list**. For more information, refer to the section [Download of export actions](#).

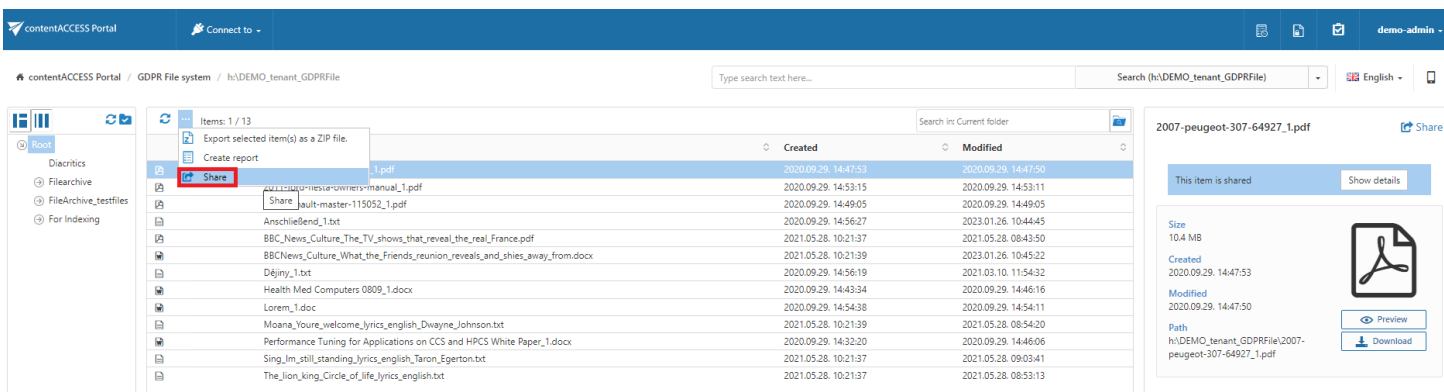
### Create report



Read more about this feature [here](#).

### Share item(s)

With this option, you can easily share links pointing to the selected items, which can be later sent to other users.





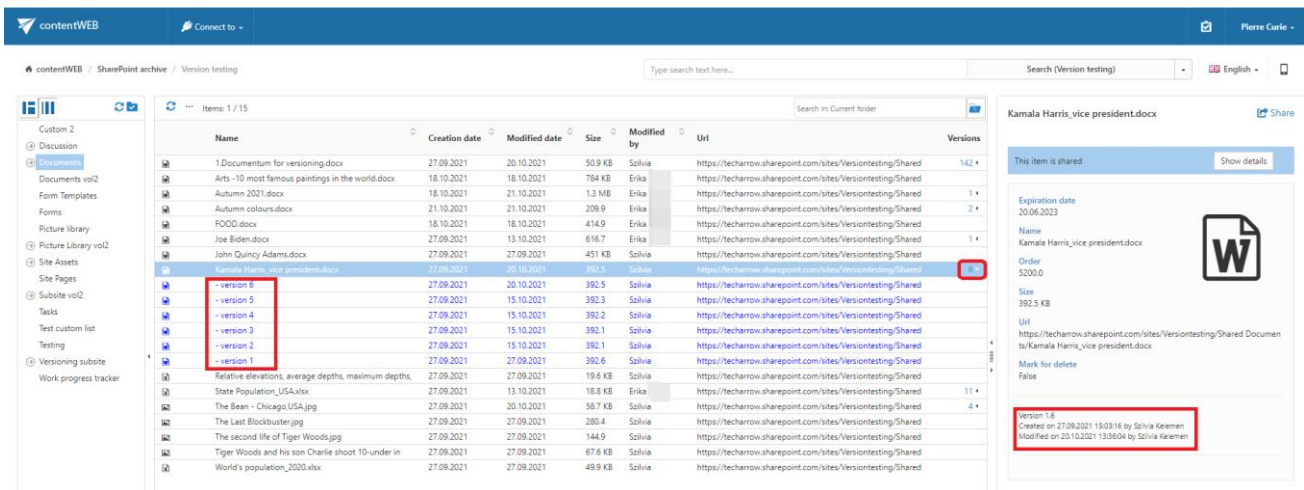
Read more about this feature [here](#).

## SharePoint archive

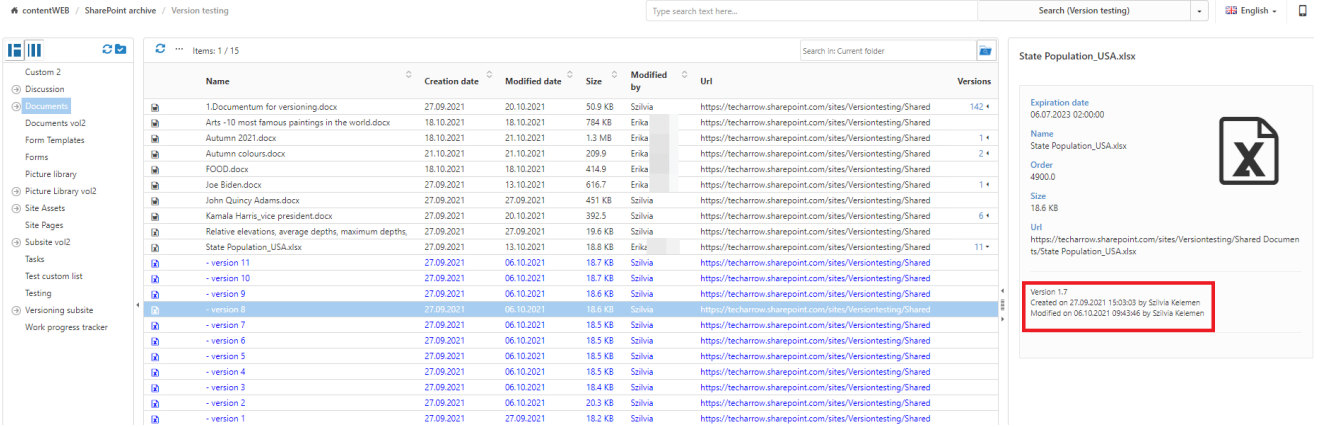
contentACCESS Portal is also a web user interface for the contentACCESS SharePoint archive. Any files archived by a SharePoint Archive job can be accessed by an end user (with the necessary rights) from contentACCESS Portal during the files' retention time.

### Item versions in SharePoint archive

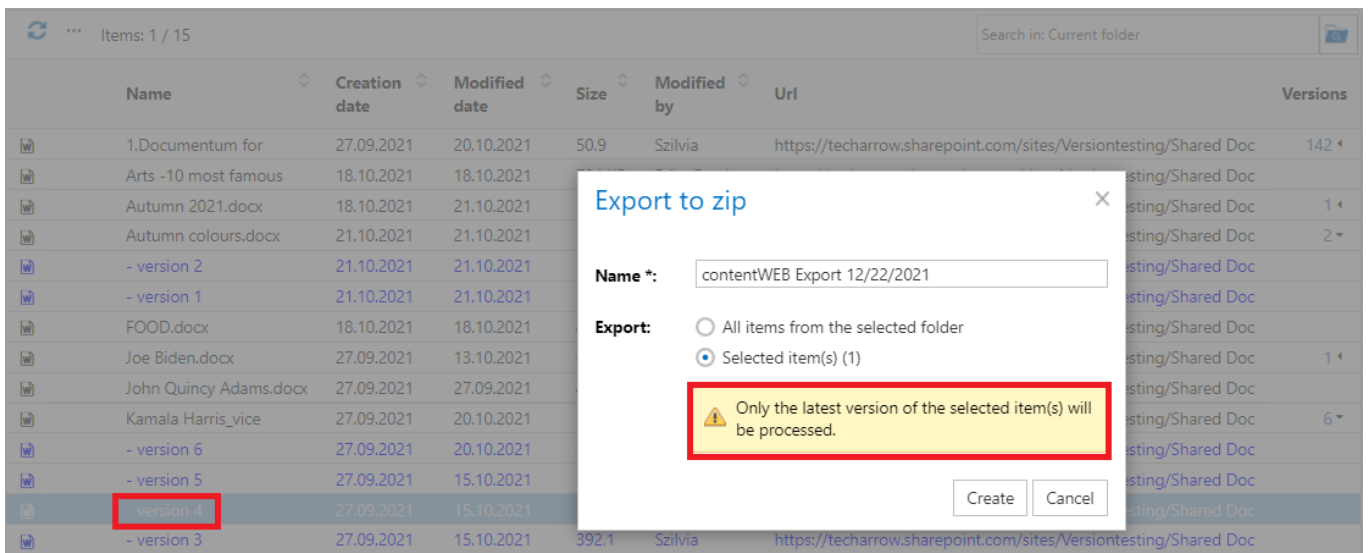
In contentACCESS Portal, the end user may also view the versions of a file that have been created during the archiving process. Versions are created when the original file is modified on SharePoint and the archive job archives this new file version into the archive. The archive job can build up the whole version history from the SharePoint site. In contentACCESS Portal, 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.



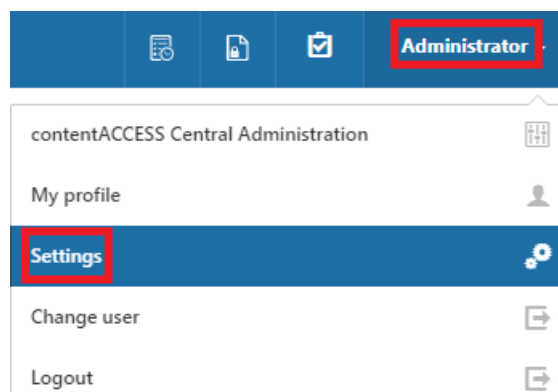
The version, the modification date, and the person who modified the items are displayed in the item's preview too.



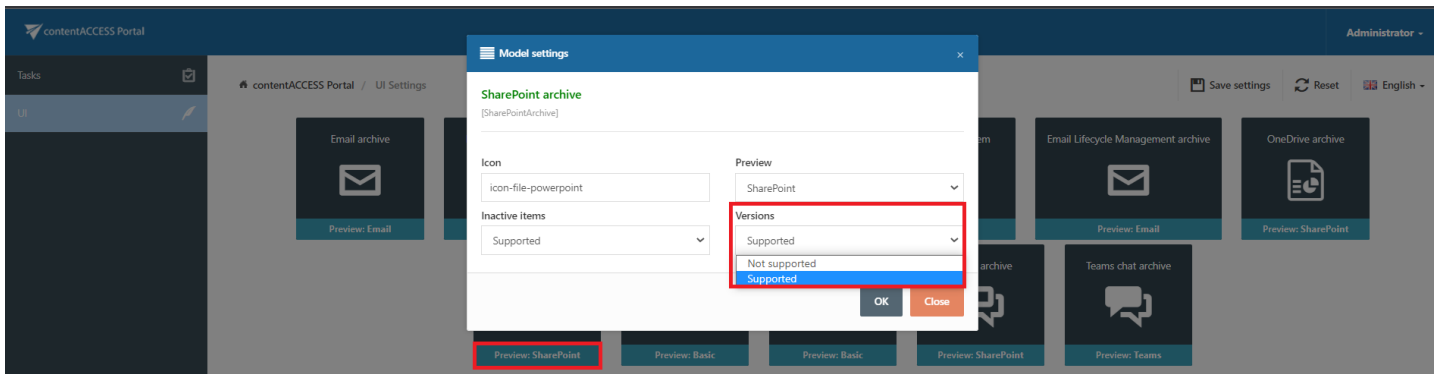
The **sharing**, the **search** and the **tasks** from the toolbar are working only with the latest/current version in the SharePoint archive. If the user stands on a previous version, the Share button is disabled. On the other hand, if the user stands on a previous version, the tasks from the toolbar are enabled, but a message will appear to inform the user that the latest version will be added to the selected task.



The version column needs to be enabled on the Settings page to see the versions in the contentACCESS Portal. 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 UI tab select the SharePoint archive model settings and select the **Versions supported** option from the drop-down menu. The changes need to be saved at the top of the page.



**Important: LIMITATIONS:** The full SP version history is archived for SharePoint 2019+ or Microsoft 365

## SharePoint archive tasks

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

1. **Refresh**
2. **Export selected item(s) as a ZIP file**
3. **Create report**
4. **Share item(s)**
5. **Recover selected item(s)**
6. **Mark document(s) for delete**
7. **Legal hold**

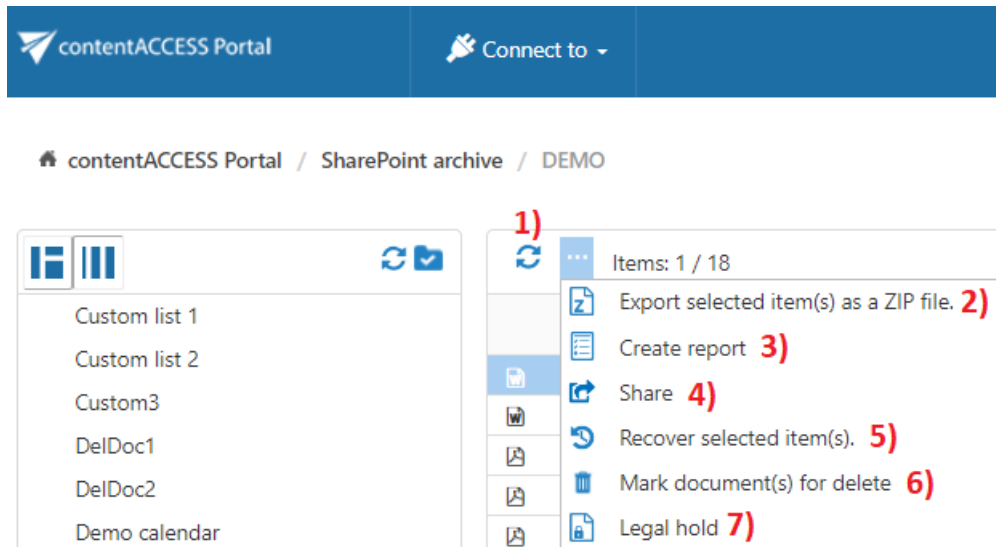
The SharePoint archive tasks can be disabled/enabled in the Administrator's settings on the Task types tab. For more information read section [Enabling/disabling tasks](#).

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](#).



1. **Refresh** - This toolbar button should be used if any items have not been displayed in the item list yet and the list of items should be reloaded
2. *Export selected item(s) as a ZIP file* - To export SharePoint archive item(s)/folder(s) as a ZIP file, select the desired item(s) from the list view (or select the node(s) in the left side pane) and click on the **Export selected item(s) as a ZIP file** button located above the list view. The exported items are zipped in the background (on the server side). The exported items/folders can be downloaded from the Tasks list. (For more information refer to section [Download of export actions](#)).
3. *Create report* - read more about this feature [here](#).
4. *Share item(s)* - with this option, you can easily share links pointing to the selected items, which can be later sent to other users. Read more about this feature [here](#).
5. *Recover selected items* - with this function the user is able to recover the deleted item(s)/folder(s) from the archive to the original location on the SharePoint site. The items can be recovered with the original modification date, or with the recovery date.
6. *Mark document(s) 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.
7. *Legal hold* - Read more about this feature [here](#).

## Opening shortcuts from SharePoint





The user can **convert** the archived files to **shortcuts** in the SharePoint archive. This option is generally used for archived items older than 1 or 2 years (it changes from company to company).

During the process, the Administrator can decide which **shortcut type** he wishes to use: “**Keep original**” or “**HTML shortcut**”. (For more information about the **archive job** and the **convert archived files to shortcuts** option, please, refer to [this](#) chapter of the contentACCESS documentation.)

If he uses the “**Keep original**” option, the files will be converted into shortcuts, but on SharePoint (unless the shortcut can manage the version history), the files will be keeping the original format, and the user will be able to open them easily.

On the other hand, when the Administrator uses the “**HTML shortcut**” type to convert the files into shortcuts, the SharePoint items will be **replaced** with **HTML files** on the SharePoint site. In this case, the whole **version history** is **deleted**, and the following **actions** are available when the user wants to open an item on SharePoint:

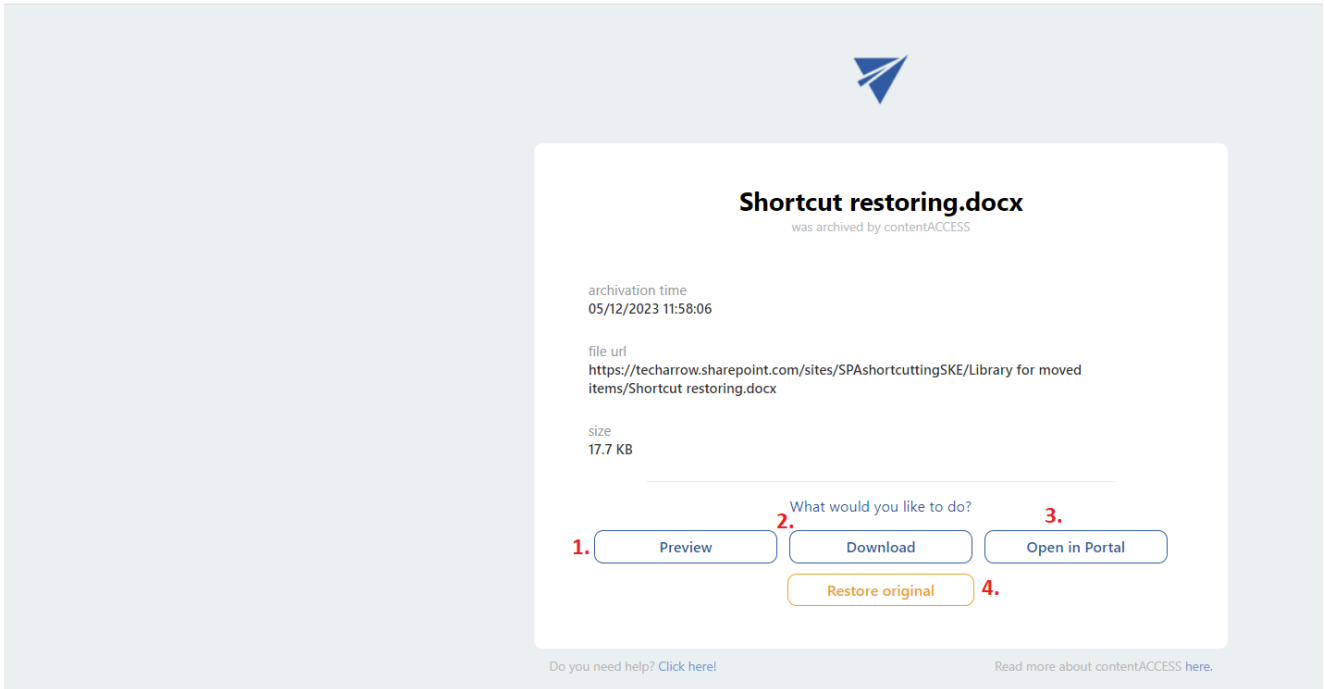
### Opening HTML shortcuts from SharePoint:

#### 1. Download the shortcut by clicking on the file

The screenshot shows a SharePoint library named "Library for moved items" containing several HTML shortcut files. The file "Shortcut restoring.docx.html" is highlighted with a red box. Below the screenshot, a browser tab is shown with the file name "Shortcut restorin...html" also highlighted with a red box.

Name	Modified	Modified By	Version
10 thing you should know about Sicily.docx.html	April 27	Szilvia Kelemen	9.0
2011 ford fiesta owners manual.pdf.html	April 14	Szilvia Kelemen	4.0
Shortcut restoring.docx.html	Yesterday at 10:05 PM	Szilvia Kelemen	10.0
Test for shortcut restoring.pptx.html	Yesterday at 10:07 PM	Szilvia Kelemen	4.0

#### 2. Open the downloaded item – it will be opened in a new tab in your browser



**Shortcut restoring.docx**  
was archived by contentACCESS

archivation time  
05/12/2023 11:58:06

file url  
<https://techarrow.sharepoint.com/sites/SPashortcuttingSKE/Library for moved items/Shortcut restoring.docx>

size  
17.7 KB

What would you like to do?

1.  2.  3.   
4.

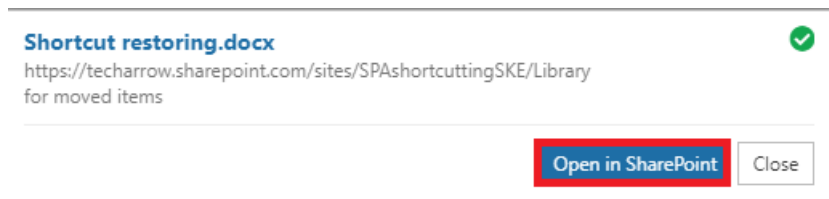
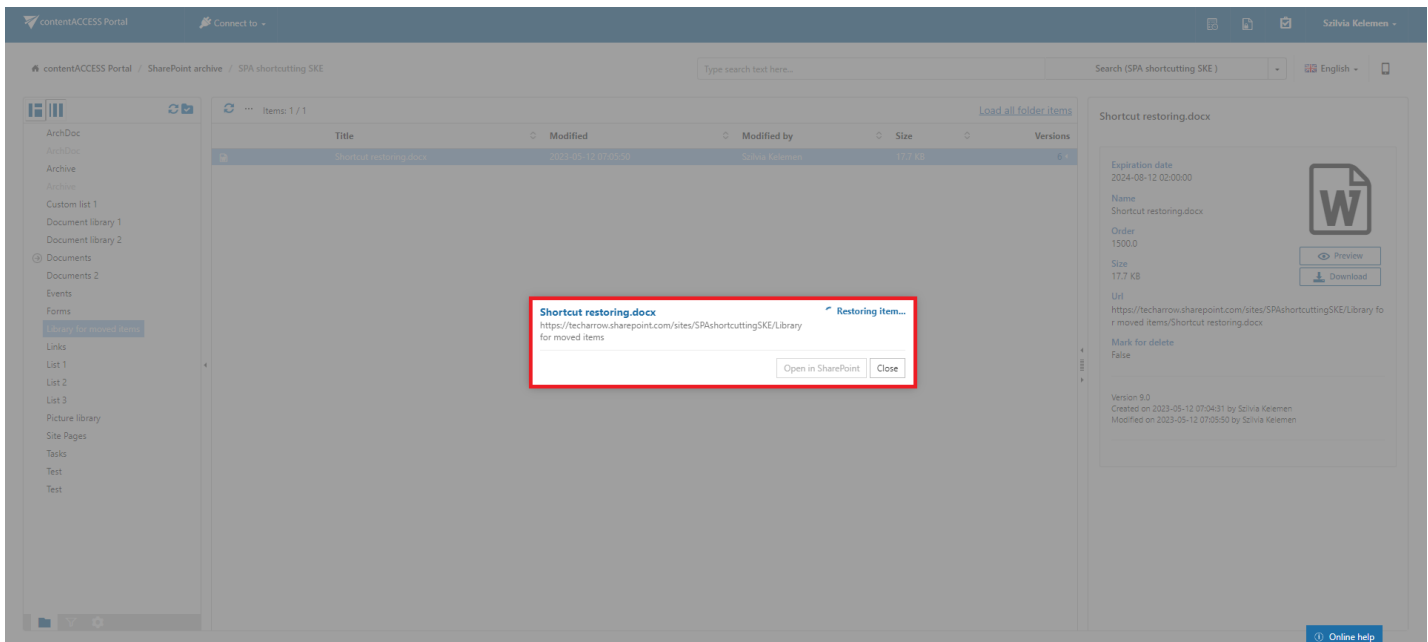
Do you need help? [Click here!](#) Read more about contentACCESS [here.](#)

Here, the following **options** are available for the user with some basic information as well – archivation date, file URL (location of the item on SharePoint), and size:

1. **Preview** – can be opened by clicking the **Preview button** or the right mouse button and the option “Open link in a new tab”. The user will be redirected to the [Preview service](#) page, where the original file will be shown. From here, the user can download the original file or save it as PDF.
2. **Download** – this button allows the user to **download the original file** (instead of the shortcut). If the user does not use the right mouse button and the “Open link in a new tab” option, he needs to go back to the previous page manually when the item is downloaded by clicking the **Back** button.
3. **Open in Portal** – this option allows the user to check the **archived item** in the contentACCESS Portal. On the Portal, the user can see the version history of the selected file, check the item and/or file preview, download the document, or sell all other items from the same folder. For more information about the **item preview in Portal**, refer to the [Item list and item preview](#) section of the manual.
4. **Restore original** – it is also possible to **restore the shortcut to the original file** from here. In this case, the selected item is opened in the **Portal**, and the restoring process appears in a pop-up window. When the process is finished, the user can open the restored file in SharePoint (opened in a new tab) or cancel the action and stay on the Portal. This option works similarly to the [Re-](#)



[cover selected item\(s\)](#) function in the Portal.

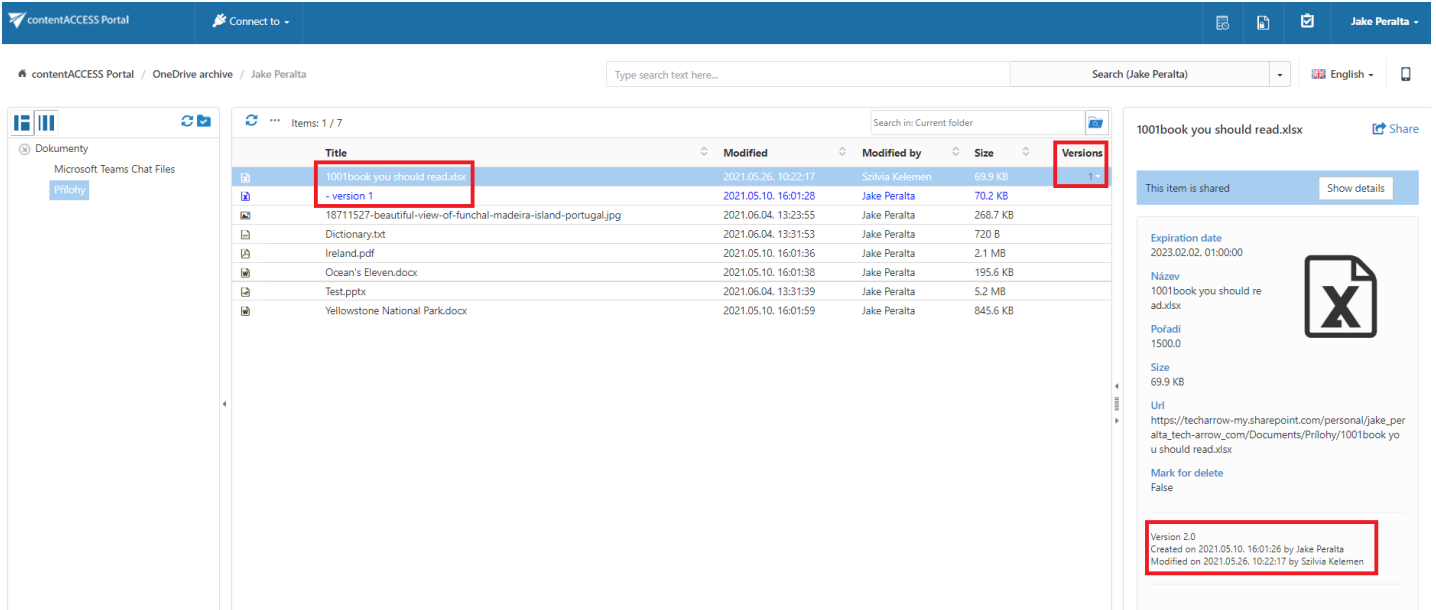


## OneDrive archive

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

## Item versions in OneDrive archive

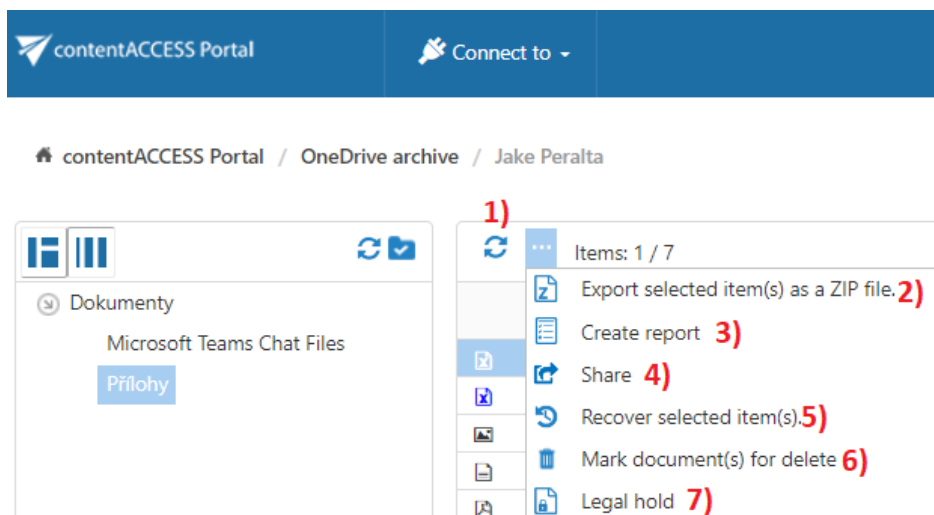
In contentACCESS Portal, the user may also view the versions of a file that have been created during the archiving process. Versions are created when the original file is modified in the user's OneDrive account, and the archive job archives this new file version into the archive. In contentACCESS Portal, 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. The item versioning in the OneDrive archive works with the same method as in the SharePoint archive. For more information refer to chapter [Item versions in SharePoint Archive](#).



## OneDrive archive tasks

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

1. Refresh
2. Export selected item(s) as a ZIP file
3. Recover selected item(s)
4. Mark document(s) for delete
5. Legal hold
6. Create report
7. Share item(s)





## Opening shortcuts from OneDrive

The user can **convert** the archived files to **shortcuts** in the OneDrive archive. This option is generally used for archived items older than 1 or 2 years (it changes from company to company).

During the process, the Administrator can decide which **shortcut type** he wishes to use: “**Keep original**” or “**HTML shortcut**”. (For more information about the **archive job** and the **convert archived files to shortcuts** option, please refer to [this](#) chapter of the contentACCESS documentation.)

If he uses the “**Keep original**” option, the files will be converted into shortcuts, but on OneDrive (unless the shortcut can manage the version history), the files will be keeping the original format, and the user will be able to open them easily.

On the other hand, when the Administrator uses the “**HTML shortcut**” type to convert the archived files into shortcuts, the OneDrive items will be **replaced** with **HTML files** on the OneDrive account. In this case, the whole **version history** is **deleted**, and the following **actions** are available when the user wants to open a file on OneDrive:

### Opening HTML shortcuts from OneDrive

#### 1. Open the file by clicking on the title

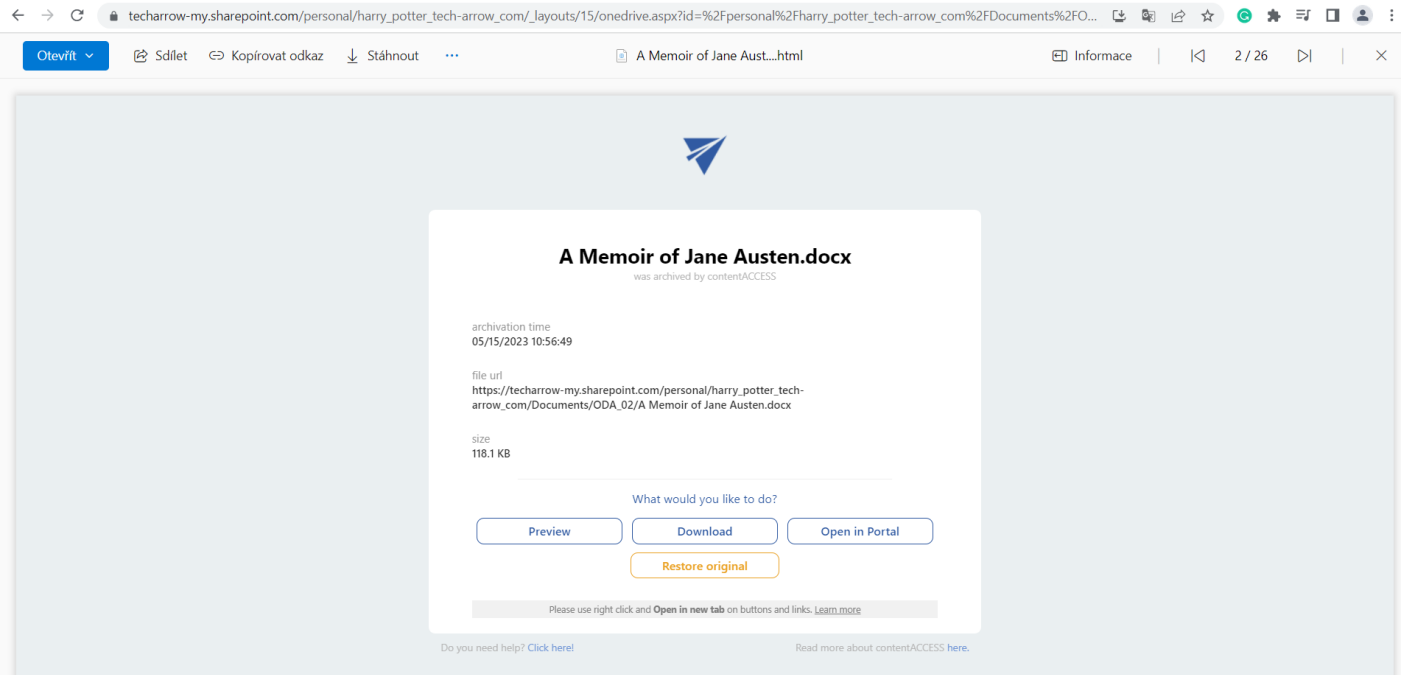
Moje soubory > ODA\_02

Název	Změněno	Autor změny	Velikost souboru	Sdílení	Aktivita
5 stages of the home buying process.docx.html	24.08.2022	Harry Potter	4,70 kB	Soukromé	
<b>A Memoir of Jane Austen.docx.html</b>			66 kB	Soukromé	Přidali jste komentář · 23. 3.
Bad.docx.html			58 kB	Soukromé	
Dangerous_Michael Jackson.docx.html			65 kB	Soukromé	
Emma.docx.html			58 kB	Soukromé	
Forever, Michael Michael Jackson.docx.html			68 kB	Soukromé	
George Washington.docx.html			63 kB	Soukromé	
Huron River.docx.html	24.08.2022	Harry Potter	4,61 kB	Soukromé	
Chicago Loop.docx.html	24.08.2022	Harry Potter	4,61 kB	Soukromé	

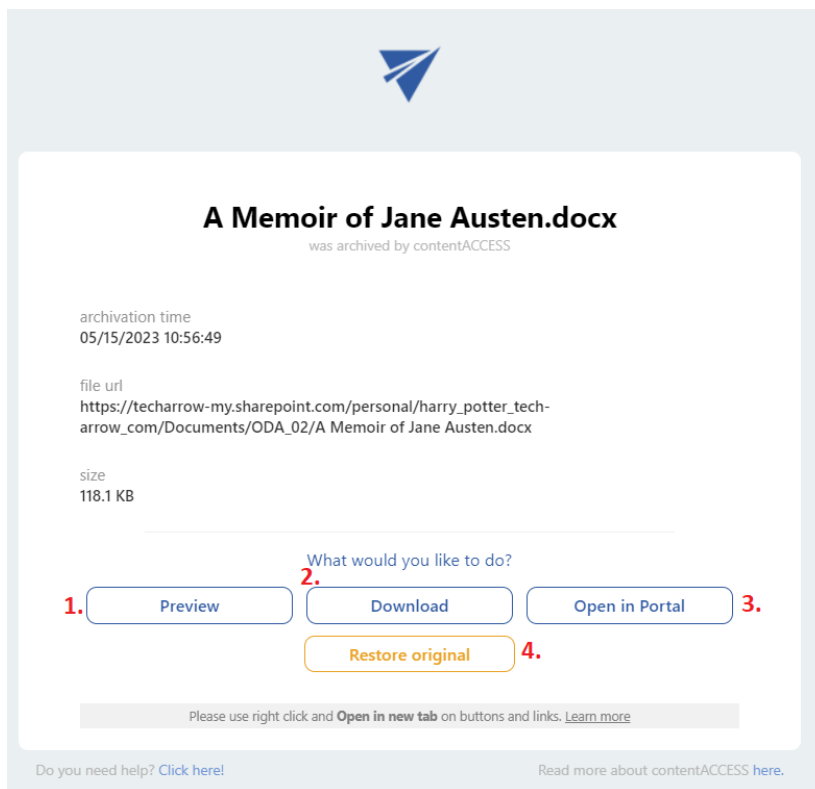
Context menu for 'A Memoir of Jane Austen.docx.html':

- A Memoir of Jane Austen.docx
- 1 Zobrazení
- Zobrazit podrobnosti
- 1 návštěvník · 1 Zobrazení
- Vy si toto zobrazil(a) před 7 min

2. The selected file will be opened on the same tab – here, the user can open, share, copy, download (etc..) the file, close this tab, or carry out the activities related to the shortcut opening.



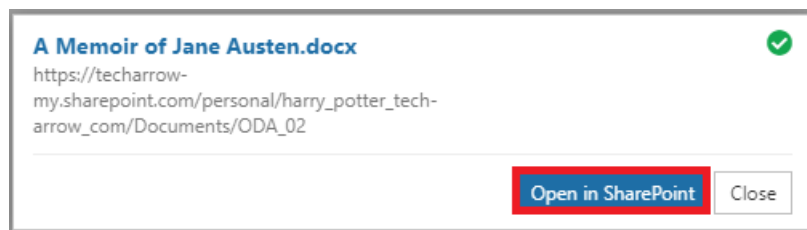
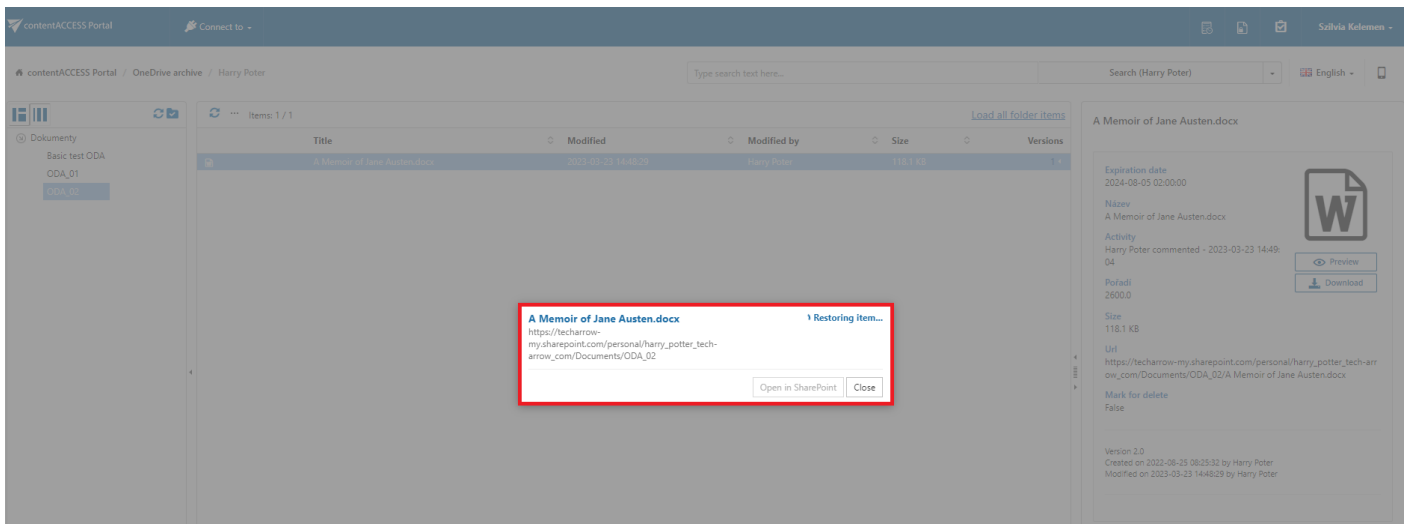
3. In this tab, the following **shortcut opening-related** options are available for the user with some basic information as well – archivation date, file URL (location of the item on OneDrive), and size:



1. **Preview** – the file’s preview can be opened by clicking the **Preview button** or the right mouse button (recommended to use this method) and the option “Open link in a new tab”. The user will be redirected to the [Preview service](#) page, where the original file will be shown. From here, the user can download the original file or save it as PDF.



2. **Download** – this button allows the user to **download the original file** (instead of the shortcut) to the local machine. If the user does not use the right mouse button and the “Open link in a new tab” option, he needs to go back to the previous page manually when the item is downloaded by clicking the **Back** button.
3. **Open in Portal** – this option allows the user to check the **archived item** in the contentACCESS Portal. In the Portal, the user can see the version history of the selected file, check the item and/or file preview, download the document, or see all other items from the same folder. For more information about the **item preview in Portal**, refer to the [Item list and item preview](#) section of the manual.
4. **Restore original** – it is also possible to **restore the shortcut to the original file** from here. In this case, the selected item is opened in the **Portal**, and the restoring process appears in a pop-up window. When the process is finished, the user can open the restored file in OneDrive (opened in a new tab) or cancel the action and stay on the Portal. This option works similarly to the [Recover selected item\(s\)](#) function in the Portal.



## Sharing

contentACCESS Portal is also a web user interface for the contentACCESS Sharing app. Any files shared by the app can be accessed by an end user (with the necessary rights) from contentACCESS Portal.

## Sharing tasks



By default, the following actions can be run on the selected sharing items:

1. Refresh
2. Export selected item(s) as a ZIP file
3. Create report
4. Modify sharing options
5. Show related files
6. Download history refresh

The **Export selected item(s) as a ZIP file** and **Create report** sharing tasks can be disabled/enabled in the Administrator's settings on the Task types tab. For more information read section [Enabling/disabling tasks](#).

The screenshot displays the contentACCESS Portal interface. At the top, there is a navigation bar with the logo, a search bar, and user information. Below the navigation bar, the main content area shows a list of sharing items. The first item, 'Demo test.zip', is selected, and a context menu is open over it, showing options like 'Export selected item(s) as a ZIP file' and 'Create report'. To the right of the list, a detailed view of the selected item is shown, including its status (Expired), shared by (Jake Peralta), expiration date, and other metadata. The interface also includes a sidebar with navigation options and a bottom bar with an 'Online help' link.

Item	Shared by	Shared on	Expiration date	Status	Referenced model	Downl. limit
Demo test.zip	jake.peralta@tech-arrow.com	2022.05.12	2022.05.27	Expired	Teams chat archive	1
Calendar	sandra.bullock@tech-arrow.com	2022.02.21	2022.03.13	Expired	Email archive	20
New NBA season to test LeBron James abilities.pdf	sandra.bullock@tech-arrow.com	2022.02.21	2024.11.16	Active	Teams archive	Unlimited
jake.peralta@tech-arrow.com has downloaded your shared	sandra.bullock@tech-arrow.com	2022.02.21	2024.11.16	Active	Email archive	Unlimited
Academic Transfer.docx	sandra.bullock@tech-arrow.com	2022.02.21	2022.03.13	Expired	File system archive	20
Academic Transfer.docx	sandra.bullock@tech-arrow.com	2022.02.21	2022.03.13	Expired	File system archive	20
Jake.msg	sandra.bullock@tech-arrow.com	2022.02.10	2022.03.02	Expired	Email archive	20
Melissa.msg	sandra.bullock@tech-arrow.com	2022.02.10	2022.03.02	Expired	Email archive	20
BBC_news_culture_the_tv_shows_that_reveal_the_real_France.msg	sandra.bullock@tech-arrow.com	2022.02.10	2022.03.02	Expired	Email archive	20
Andy Samberg's career.msg	sandra.bullock@tech-arrow.com	2022.02.10	2022.03.02	Expired	Email archive	20
1001book you should read.xlsx	jake.peralta@tech-arrow.com	2022.02.07	2022.02.11	Expired	OneDrive archive	1
Virtual Drive.pptx	sandra.bullock@tech-arrow.com	2022.02.07	2022.03.02	Expired	Direct upload	23
CA - GATE.contentAccess.log	sandra.bullock@tech-arrow.com	2022.02.07	2022.02.19	Expired	Direct upload	12
Archive with share path 2.3.44 - mcs01 problem.txt	sandra.bullock@tech-arrow.com	2022.02.07	2022.02.19	Expired	Direct upload	12
Add - Edit tenant.jpg	sandra.bullock@tech-arrow.com	2022.02.07	2022.02.19	Expired	Direct upload	12
1001 movie you should watch.txt	sandra.bullock@tech-arrow.com	2022.02.07	2022.02.08	Expired	OneDrive archive	1
Test with emails attachmsg	sandra.bullock@tech-arrow.com	2022.02.07	2022.02.08	Expired	Email archive	1
Test with emails attachmsg	sandra.bullock@tech-arrow.com	2022.02.07	2022.02.08	Expired	Email archive	1
2016-18-college-catalog-north-seattle-college.pdf	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.04	Expired	File system archive	2
Emily Bronte.zip	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.11	Expired	Teams chat archive	2
Health Med Computers 0809_1.docx	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.05	Expired	GDPR File system	5
To: Melissa + Jake.msg	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.05	Expired	Email archive	4
BBC_News_Culture_Art_La_Peregrina_The_worlds_most_famous_pe	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.06	Expired	Email archive	3
To Melissa.msg	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.26	Expired	Email archive	2
Jake.msg	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.26	Expired	Email archive	2

## Refresh

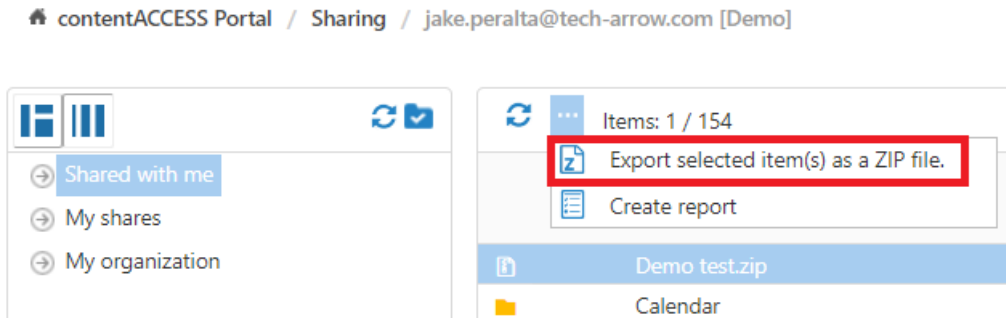
This option should be used if any items have not been displayed in the item list yet and the list of items should be reloaded.

## Export selected item(s) as a ZIP file

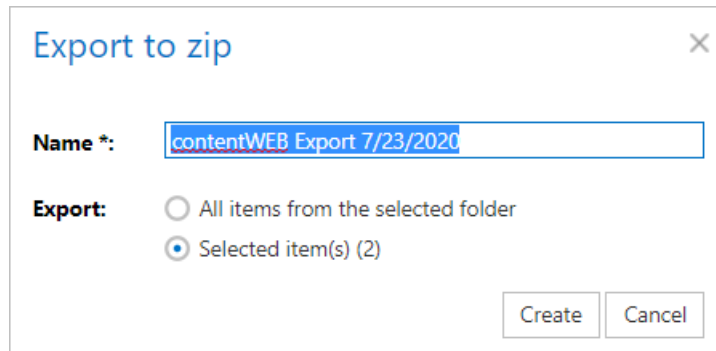
To export one or multiple sharing item(s) into ZIP format, select the item(s) from the item list and click on the



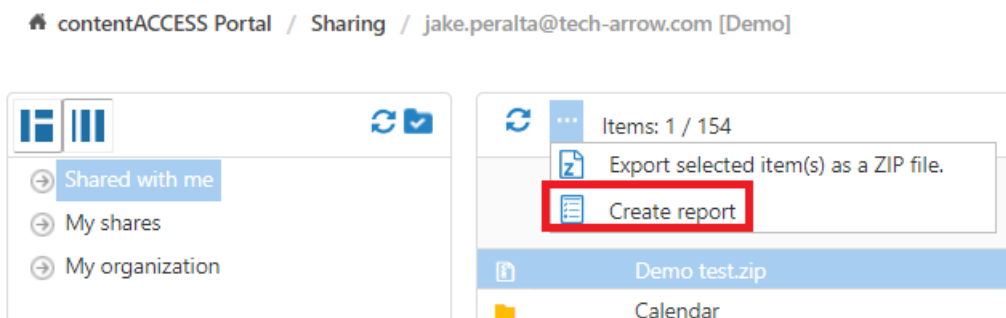
**Export selected item(s) as a ZIP file** button located above the item list.



Choose if you want to export all items from the current folder, or only the selected item(s). Click on **Create** or press enter.



### Create report



Read more about this feature [here](#).

## Modify sharing options

Read more about this feature [here](#).

contentACCESS Portal / Sharing / jake.peralta@tech-arrow.com [Demo]

File name	Shared by	Shared on	Expiration date	Status	Referenced model	Download limit
Demo test.zip	jake.peralta@tech-	2022.05.12.	2022.05.27.	Expired	Teams chat archive	1
Calendar	sandra.bullock@tech-	2022.02.21.	2022.03.13.	Expired	Email archive	20
New NBA season to test LeBron James abilities.pdf	sandra.bullock@tech-	2022.02.21.	2024.11.16.	Active	Teams archive	Unlimit
jake.peralta@tech-arrow.com has downloaded your shared	sandra.bullock@tech-	2022.02.21.	2024.11.16.	Active	Email archive	Unlimit
Academic Transfer.docx	sandra.bullock@tech-	2022.02.21.	2022.03.13.	Expired	File system archive	20
Academic Transfer.docx	sandra.bullock@tech-	2022.02.21.	2022.03.13.	Expired	File system archive	20
Jake.msg	sandra.bullock@tech-	2022.02.10.	2022.03.02.	Expired	Email archive	20
Melissa.msg	sandra.bullock@tech-	2022.02.10.	2022.03.02.	Expired	Email archive	20
BBC_news_culture_the_tv_shows_that_reveal_the_real_France.msg	sandra.bullock@tech-	2022.02.10.	2022.03.02.	Expired	Email archive	20
Andy Samberg's career.msg	sandra.bullock@tech-	2022.02.10.	2022.03.02.	Expired	Email archive	20
1001book you should read.xlsx	jake.peralta@tech-	2022.02.07.	2022.02.11.	Expired	OneDrive archive	1
Virtual Drive.pptx	sandra.bullock@tech-	2022.02.07.	2022.03.02.	Expired	Direct upload	23
CA - GATE.contentAccess.log	sandra.bullock@tech-	2022.02.07.	2022.02.19.	Expired	Direct upload	12
Archive with share path 2.3.44 - mcs01 problem.bt	sandra.bullock@tech-	2022.02.07.	2022.02.19.	Expired	Direct upload	12
Add - Edit tenant.jpg	sandra.bullock@tech-	2022.02.07.	2022.02.19.	Expired	Direct upload	12
1001 movie you should watch.bt	sandra.bullock@tech-	2022.02.07.	2022.02.08.	Expired	OneDrive archive	1
Test with emails attach.msg	sandra.bullock@tech-	2022.02.07.	2022.02.08.	Expired	Email archive	1
Test with emails attach.msg	sandra.bullock@tech-	2022.02.07.	2022.02.08.	Expired	Email archive	1
2016-18-college-catalog-north-seattle-college.pdf	sandra.bullock@tech-	2022.02.04.	2022.02.04.	Expired	File system archive	2
Emily Bronte.zip	sandra.bullock@tech-	2022.02.04.	2022.02.11.	Expired	Teams chat archive	2
Health Med Computers 0809_1.docx	sandra.bullock@tech-	2022.02.04.	2022.02.05.	Expired	GDPR File system	5
To: Melissa + Jake.msg	sandra.bullock@tech-	2022.02.04.	2022.02.05.	Expired	Email archive	4
BBC_News_Culture_Art_La_Peregrina_The_worlds_most_famous_pe	sandra.bullock@tech-	2022.02.04.	2022.02.06.	Expired	Email archive	3
To Melissa.msg	sandra.bullock@tech-	2022.02.04.	2022.02.26.	Expired	Email archive	2
Jake.msg	sandra.bullock@tech-	2022.02.04.	2022.02.26.	Expired	Email archive	2

Sharing options: **Modify sharing options**

## Show related files

Read more about this feature [here](#).

contentACCESS Portal / Sharing / jake.peralta@tech-arrow.com [Demo]

File name	Shared by	Shared on	Expiration date	Status	Referenced model	Download limit
Demo test.zip	jake.peralta@tech-	2022.05.12.	2022.05.27.	Expired	Teams chat archive	1
Calendar	sandra.bullock@tech-	2022.02.21.	2022.03.13.	Expired	Email archive	20
New NBA season to test LeBron James abilities.pdf	sandra.bullock@tech-	2022.02.21.	2024.11.16.	Active	Teams archive	Unlimit
jake.peralta@tech-arrow.com has downloaded your shared	sandra.bullock@tech-	2022.02.21.	2024.11.16.	Active	Email archive	Unlimit
Academic Transfer.docx	sandra.bullock@tech-	2022.02.21.	2022.03.13.	Expired	File system archive	20
Academic Transfer.docx	sandra.bullock@tech-	2022.02.21.	2022.03.13.	Expired	File system archive	20
Jake.msg	sandra.bullock@tech-	2022.02.10.	2022.03.02.	Expired	Email archive	20
Melissa.msg	sandra.bullock@tech-	2022.02.10.	2022.03.02.	Expired	Email archive	20
BBC_news_culture_the_tv_shows_that_reveal_the_real_France.msg	sandra.bullock@tech-	2022.02.10.	2022.03.02.	Expired	Email archive	20
Andy Samberg's career.msg	sandra.bullock@tech-	2022.02.10.	2022.03.02.	Expired	Email archive	20
1001book you should read.xlsx	jake.peralta@tech-	2022.02.07.	2022.02.11.	Expired	OneDrive archive	1
Virtual Drive.pptx	sandra.bullock@tech-	2022.02.07.	2022.03.02.	Expired	Direct upload	23
CA - GATE.contentAccess.log	sandra.bullock@tech-	2022.02.07.	2022.02.19.	Expired	Direct upload	12
Archive with share path 2.3.44 - mcs01 problem.bt	sandra.bullock@tech-	2022.02.07.	2022.02.19.	Expired	Direct upload	12
Add - Edit tenant.jpg	sandra.bullock@tech-	2022.02.07.	2022.02.19.	Expired	Direct upload	12
1001 movie you should watch.bt	sandra.bullock@tech-	2022.02.07.	2022.02.08.	Expired	OneDrive archive	1
Test with emails attach.msg	sandra.bullock@tech-	2022.02.07.	2022.02.08.	Expired	Email archive	1
Test with emails attach.msg	sandra.bullock@tech-	2022.02.07.	2022.02.08.	Expired	Email archive	1
2016-18-college-catalog-north-seattle-college.pdf	sandra.bullock@tech-	2022.02.04.	2022.02.04.	Expired	File system archive	2
Emily Bronte.zip	sandra.bullock@tech-	2022.02.04.	2022.02.11.	Expired	Teams chat archive	2
Health Med Computers 0809_1.docx	sandra.bullock@tech-	2022.02.04.	2022.02.05.	Expired	GDPR File system	5
To: Melissa + Jake.msg	sandra.bullock@tech-	2022.02.04.	2022.02.05.	Expired	Email archive	4
BBC_News_Culture_Art_La_Peregrina_The_worlds_most_famous_pe	sandra.bullock@tech-	2022.02.04.	2022.02.06.	Expired	Email archive	3
To Melissa.msg	sandra.bullock@tech-	2022.02.04.	2022.02.26.	Expired	Email archive	2
Jake.msg	sandra.bullock@tech-	2022.02.04.	2022.02.26.	Expired	Email archive	2

Sharing options: **Show related files**

## Download history refresh

This option should be used if any downloads of a shared item have not been displayed yet and the list

should be reloaded.

# contentACCESS Portal / Sharing / jake.peralta@tech-arrow.com [Demo]

Type search text here... Search (jake.peralta@tech-arrow.com [Demo]) English

Items: 1 / 154

Icon	Name	Sender	Created	Expires	Status	Category	Count
✉	BBC_News_Culture_Art_La_Peregrina_The_worlds_most_famous_pe	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.06	Expired	Email archive	3
✉	To Melissa.msg	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.26	Expired	Email archive	2
✉	Jake.msg	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.26	Expired	Email archive	2
✉	Your BETA - TECH-ARROW STORE order is now complete.msg	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.26	Expired	Email archive	2
📄	American Grown by Michelle (1) (1).docx	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.26	Expired	Direct upload	2
✉	jake.peralta@tech-arrow.com has downloaded your shared	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.26	Expired	Direct upload	2
✉	Periodical search result.msg	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.05	Expired	Direct upload	2
📄	American Grown by Michelle .docx	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.05	Expired	Direct upload	2
✉	jake.peralta@tech-arrow.com has downloaded your shared	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.26	Expired	Direct upload	2
📄	Filtering in reports.xlsx	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.26	Expired	Direct upload	2
📄	ron-weasley.jpg	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.26	Expired	Direct upload	2
📄	Sandra Bullock.contentACCESS Dev.contentACCESS.zip	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.26	Expired	Direct upload	2
📄	Elvis Presley.jpg	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.26	Expired	Direct upload	2
✉	_testmessage_.msg	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.26	Expired	Direct upload	2
✉	Periodical search result.msg	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.05	Expired	Direct upload	1
📄	American Grown by Michelle .docx	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.05	Expired	Direct upload	1
📄	harry-potter-16.jpg	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.05	Expired	SharePointProxyModel	1
✉	jake.peralta@tech-arrow.com has downloaded your shared	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.05	Expired	Direct upload	2
📄	Melissa McCarthy.contentACCESS Dev.zip	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.05	Expired	Teams chat archive	2
📄	contentACCESS Dev.zip	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.05	Expired	Teams chat archive	2
📄	Erika Bugár.zip	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.05	Expired	Teams chat archive	2
📄	Emily Bronte.zip	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.05	Expired	Teams chat archive	2
📄	Pfilohy	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.05	Expired	OneDrive archive	2
📄	1001 movie you should watch.bit	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.05	Expired	OneDrive archive	4
📄	2007-peugeot-307-64927.pdf	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.05	Expired	OneDrive archive	4
📄	Agnes Grey.docx	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.05	Expired	OneDrive archive	4
📄	1001 movie you should watch.bit	sandra.bullock@tech-arrow.com	2022.02.04	2022.02.05	Expired	OneDrive archive	2

Expired  
Shared by Sandra Bullock  
Shared on 2022.02.10, 08:45:29  
Expiration date 2022.03.02, 23:59:59  
Download limit 20 per recipient  
Download count 1  
Shared with Recipients only  
Recipient(s) jake.peralta@tech-arrow.com  
Model Email archive

Sharing options Show related files

Download history

Name	Download date	Device
jake.peralta@tech-arrow.com	2022.02.10, 09:25:44	Other device

## Teams archive

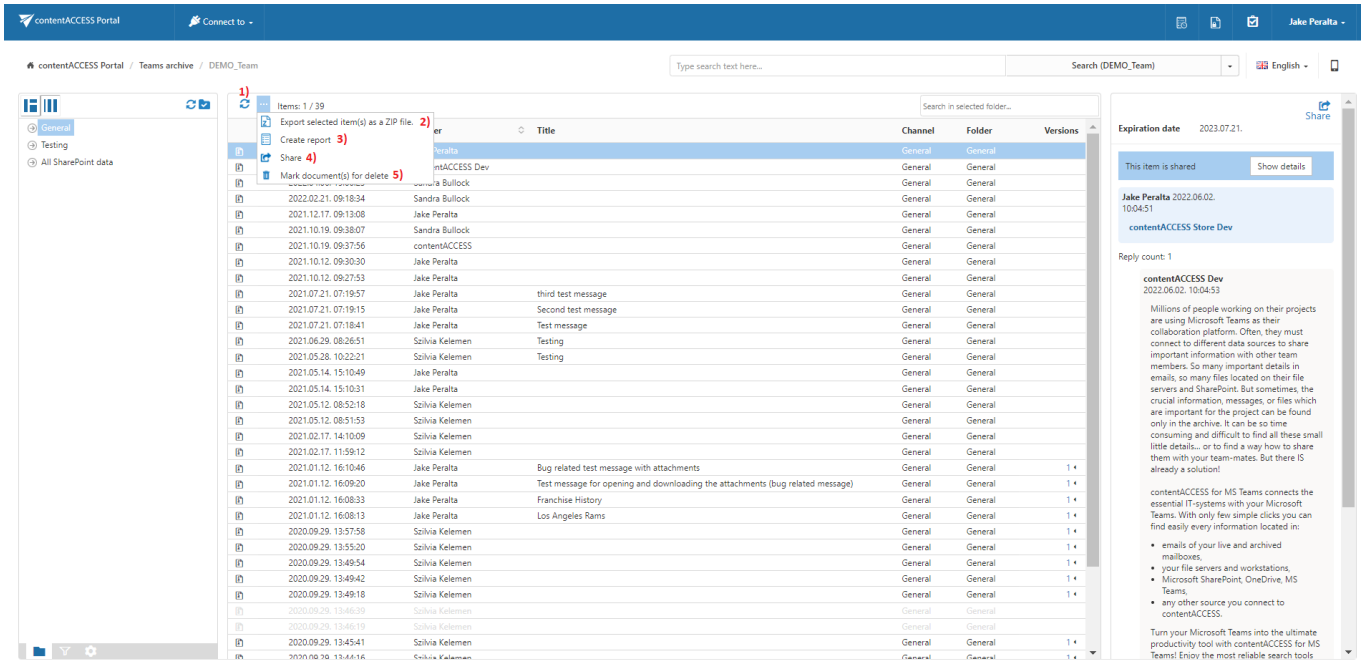
contentACCESS Portal is also a web user interface for Teams archive and Teams chat archive. Items archived by an archiving job can be accessed by an end user from contentACCESS Portal during their retention time.

## Teams archive tasks

By default, the following actions can be run on the selected Teams archive items:

1. Refresh
2. Export selected item(s) as a ZIP file
3. Create report
4. Share item(s)
5. Mark document(s) for delete

The Export selected item(s) as a ZIP file and Create report tasks can be disabled/enabled in the **Administrator's settings** on the Task types tab. For more information read section [Enabling/disabling tasks](#).

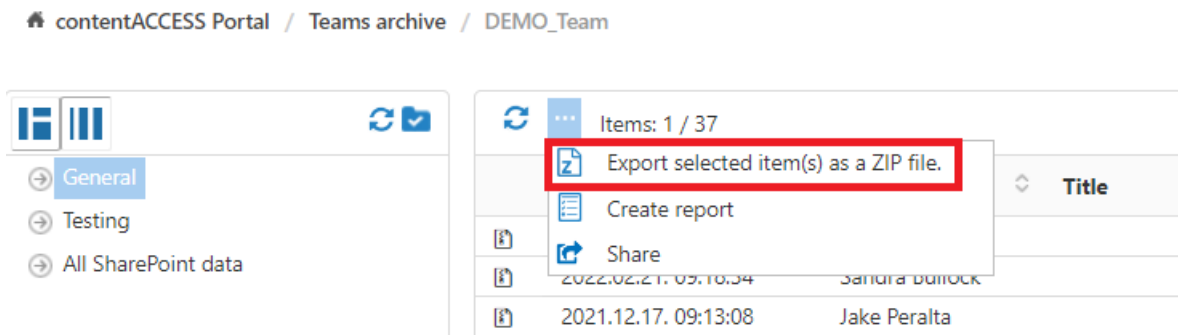


### Refresh

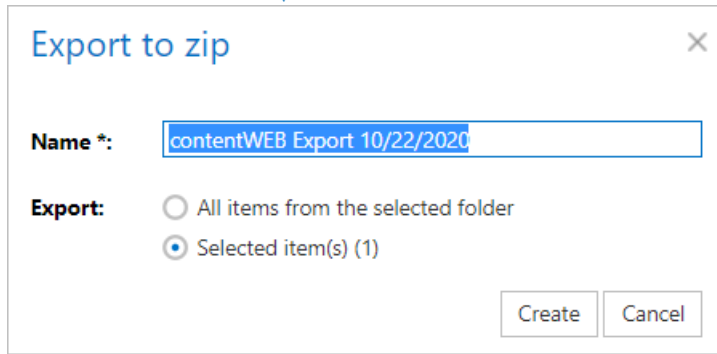
This option should be used if any items have not been displayed in the item list yet and the list of items should be reloaded.

### Export selected item(s) as a ZIP file

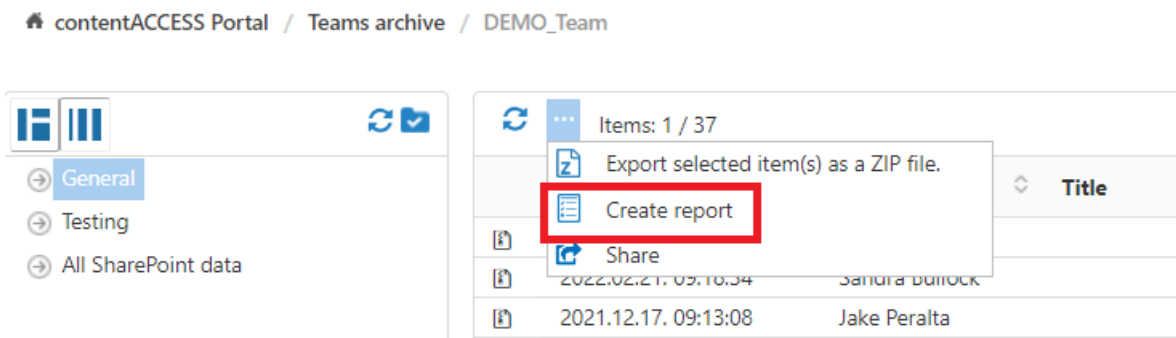
To export one or multiple item(s) into ZIP format, select the item(s) from the item list and click on the **Export selected item(s) as a ZIP file** button located above the item list.



Choose if you want to export all items from the current folder, or only the selected item(s). Click on **Create** or press enter.



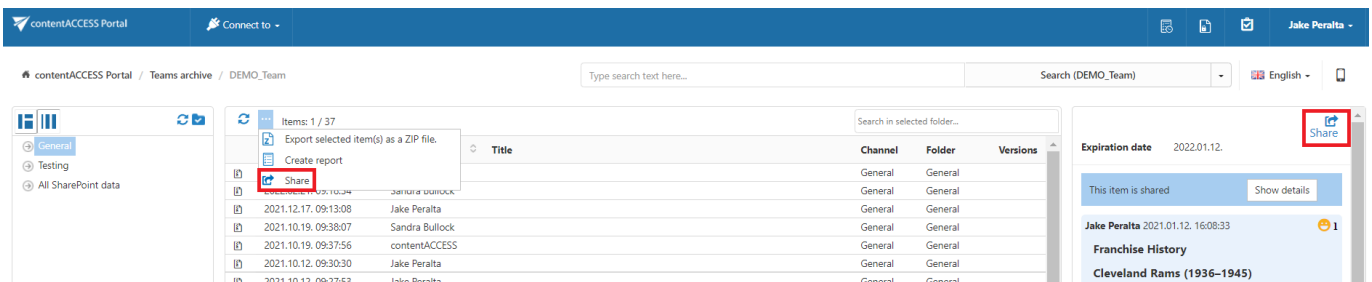
### Create report



Read more about this feature [here](#).

### Share item(s) and Share

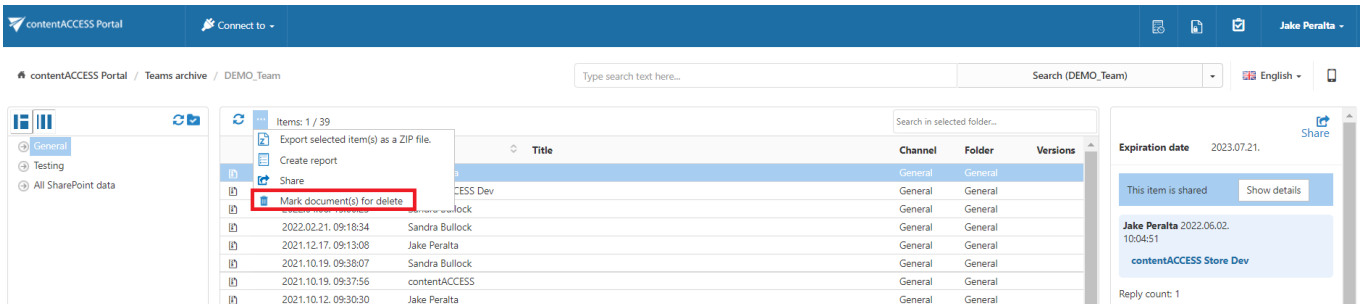
With these options, you can easily share links pointing to the selected items, which can be later sent to other users.



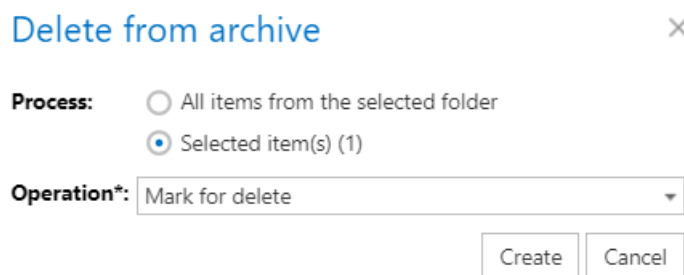
Both options are described in [this](#) section.

## Mark document(s) 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**.



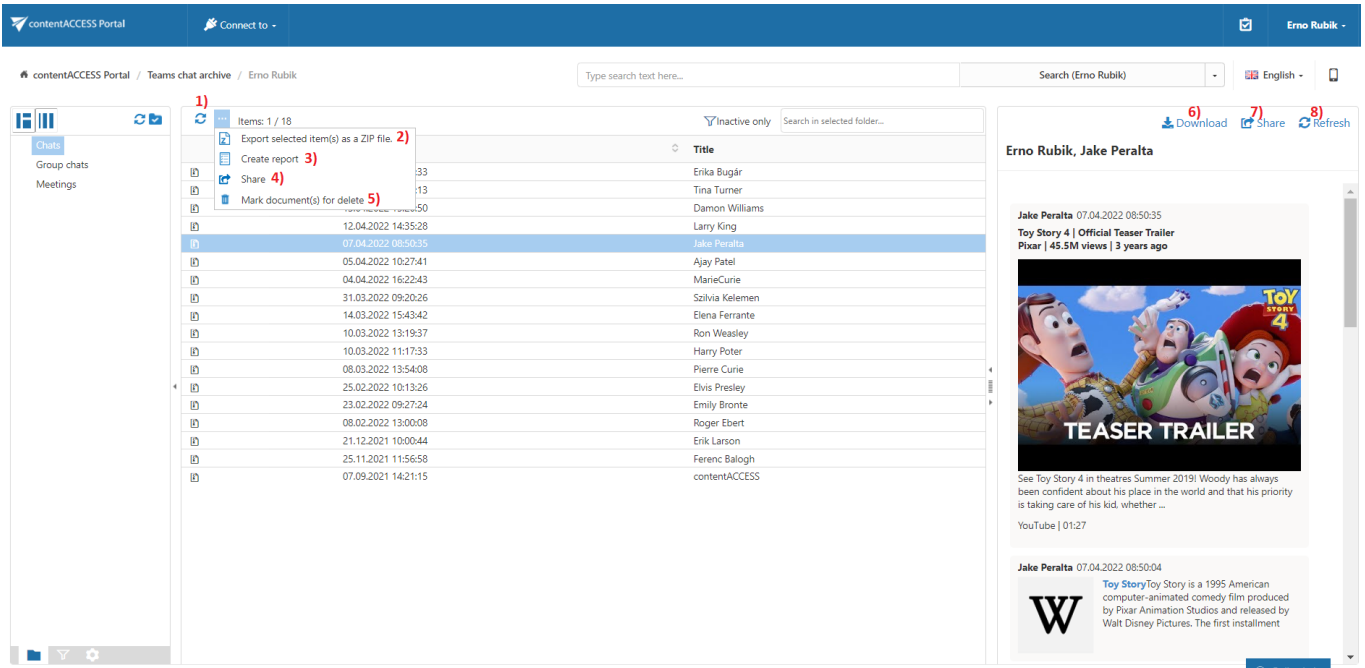
## Teams chat archive tasks

By default, the following actions can be run on the selected Teams chat archive items:

- 1) Refresh (list)
- 2) Export selected item(s) as a ZIP file
- 3) Create report
- 4) Share item(s)
- 5) Mark document(s) for delete
- 6) Download
- 7) Share
- 8) Refresh (item)

The **Export selected item(s) as a ZIP file** and **Create report** tasks can be disabled/enabled in the Adminis-

trator's settings on the Task types tab. For more information read section [Enabling/disablingtasks](#).

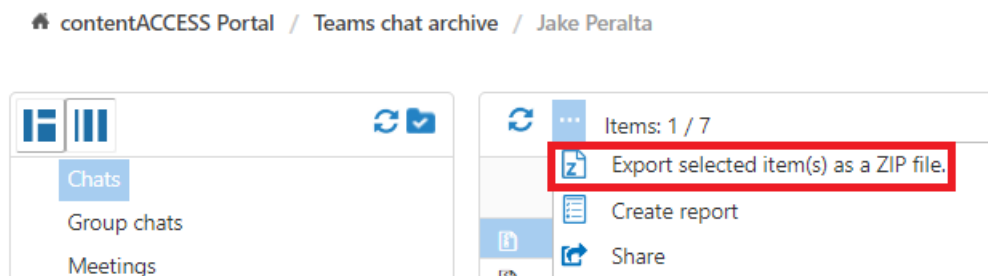


### Refresh (list)

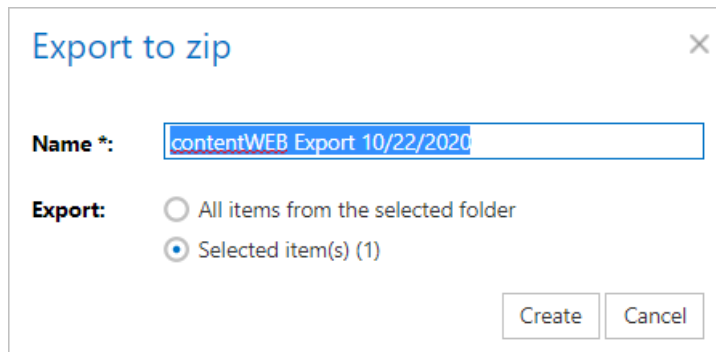
This option should be used if any items have not been displayed in the item list yet and the list of items should be reloaded.

### Export selected item(s) as a ZIP file

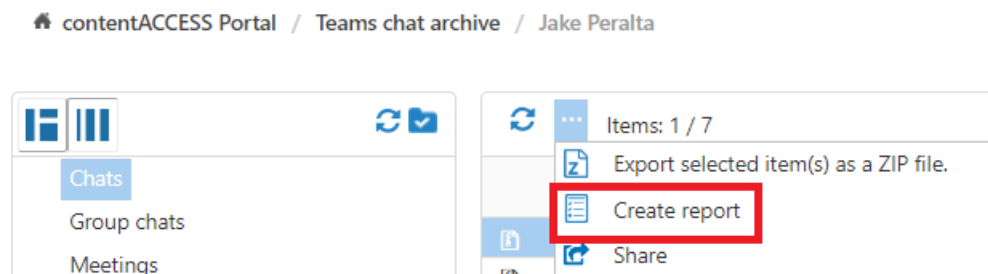
To export one or multiple item(s) into ZIP format, select the item(s) from the item list and click on the **Export selected item(s) as a ZIP file** button located above the item list.



Choose if you want to export all items from the current folder, or only the selected item(s). Click on **Create** or press enter.



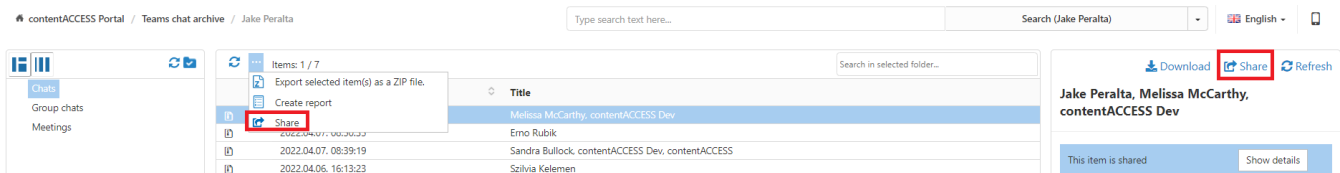
## Create report



Read more about this feature [here](#).

## Share item(s) and Share

With these options, you can easily share links pointing to the selected items, which can be later sent to other users.



Both options are described in [this](#) section.

## Mark document(s) 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 chats or all chats from the current folder. First and foremost, the **Mark document(s) for delete** function needs to be enabled in the Administrator's





settings on the **Task types** tab. For more information read section [Enabling/disabling tasks](#). After **enabling the Mark for delete** function, go back to the Portal. If the option doesn't appear in the context menu, either a re-login is required, or you don't have access to that function. In that case, **contact your Administrator**.

**The Mark for delete function** works differently in the Teams chat archive than in the other models. Here, if you mark a chat for deletion, the **icon will appear on the messages** (in the preview) instead of the **whole conversation** (on the item's list). But, if all messages are deleted from the chat, the conversation disappears from the items' list. It is also possible to delete a whole **Teams chat archive entity** with the delete job.

The screenshot displays the contentACCESS Portal interface. On the left, there is a sidebar with 'Chats' and 'Meetings'. The main area shows a list of chat items with columns for 'Date' and 'Title'. The item '08.03.2022 13:54:08' with title 'Pierre Curie' is selected. On the right, a chat preview for 'Erno Rubik, Pierre Curie' is shown, featuring messages and images. Red boxes highlight the delete icons (trash can) next to the messages in the preview.

Date	Title
19.04.2022 08:49:33	Erika Bugár
13.04.2022 15:23:13	Tina Turner
13.04.2022 15:20:50	Damon Williams
12.04.2022 14:35:28	Larry King
07.04.2022 08:50:35	Jake Peralta
05.04.2022 10:27:41	Ajay Patel
04.04.2022 16:22:43	MarieCurie
31.03.2022 09:20:26	Szilvia Kelemen
14.03.2022 15:43:42	Elena Ferrante
10.03.2022 13:19:37	Ron Weasley
10.03.2022 11:17:33	Harry Potter
08.03.2022 13:54:08	Pierre Curie
25.02.2022 10:13:26	Elvis Presley
23.02.2022 09:27:24	Emily Bronte
08.02.2022 13:00:08	Roger Ebert
21.12.2021 10:00:44	Erik Larson
25.11.2021 11:56:58	Ferenc Balogh
07.09.2021 14:21:15	contentACCESS

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

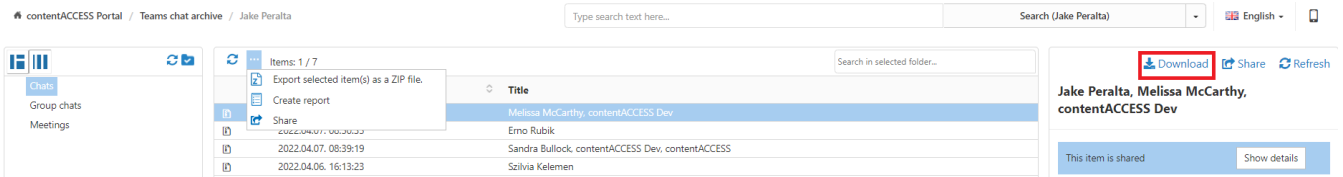
### Delete from archive ×

**Process:**  All items from the selected folder  
 Selected item(s) (1)

**Operation\*:** Mark for delete

## Download

The selected Teams chat archive item can be downloaded by clicking on this button.



contentACCESS Portal / Teams chat archive / Jake Peralta

Type search text here... Search (Jake Peralta) English

Items: 1 / 7

ID	Title
	Melissa McCarthy, contentACCESS Dev
	Erno Rubik
2022.04.07. 08:39:19	Sandra Bullock, contentACCESS Dev, contentACCESS
2022.04.06. 16:13:23	Szilvia Kelemen

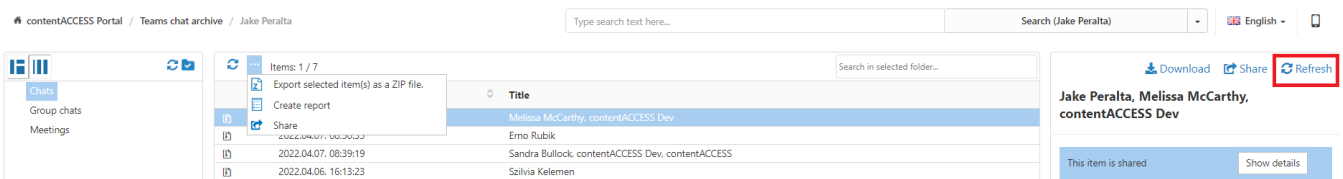
Download Share Refresh

Jake Peralta, Melissa McCarthy, contentACCESS Dev

This item is shared Show details

## Refresh (item)

This option should be used if any changes were made to the selected item and the changes are not yet displayed in the preview.



contentACCESS Portal / Teams chat archive / Jake Peralta

Type search text here... Search (Jake Peralta) English

Items: 1 / 7

ID	Title
	Melissa McCarthy, contentACCESS Dev
	Erno Rubik
2022.04.07. 08:39:19	Sandra Bullock, contentACCESS Dev, contentACCESS
2022.04.06. 16:13:23	Szilvia Kelemen

Download Share Refresh

Jake Peralta, Melissa McCarthy, contentACCESS Dev

This item is shared Show details

## Opening shortcuts from Teams

The user can **convert** the archived files to **shortcuts** in the Teams archive. This option is generally used for archived items older than 1 or 2 years (it changes from company to company). During the process, the Administrator can decide which **shortcut type** he wishes to use: “**Keep original**” or “**HTML shortcut**”. (For more information about the archive job and the convert archived files to shortcuts option, please refer to [this](#) chapter of the contentACCESS documentation.)

If he uses the “**Keep original**” option, the files will be converted into shortcuts, but in the Teams and on the Team-related SharePoint site (unless the shortcut can manage the version history), the files will be keeping the original format, and the user will be able to open them easily.

On the other hand, when the Administrator uses the “**HTML shortcut**” type to convert the archived files into shortcuts, the Teams items (and custom SharePoint data) will be **replaced** with **HTML files** in the Teams and on the Team-related SharePoint site. In this case, the whole **version history** is **deleted**, and the following actions are available when the user wants to open a file in Teams (or in SharePoint):

### Opening HTML shortcuts from Teams/Team-related SharePoint site

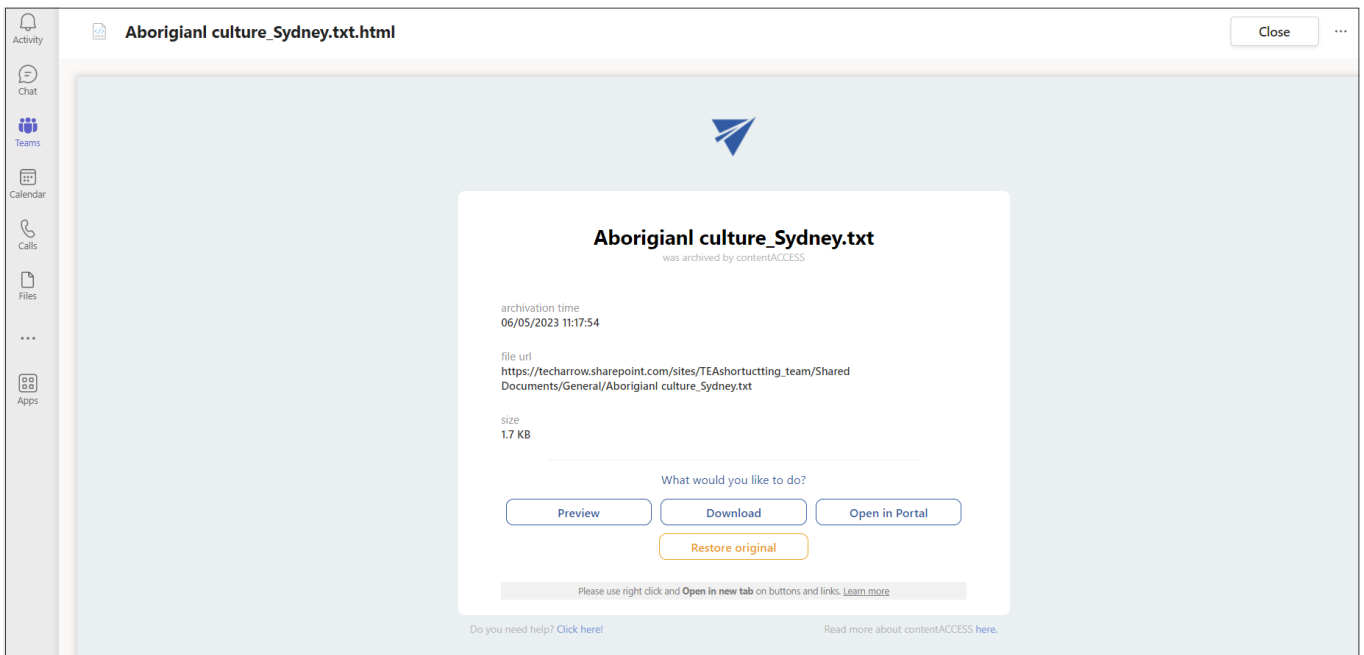
1. Open the file by clicking on the title



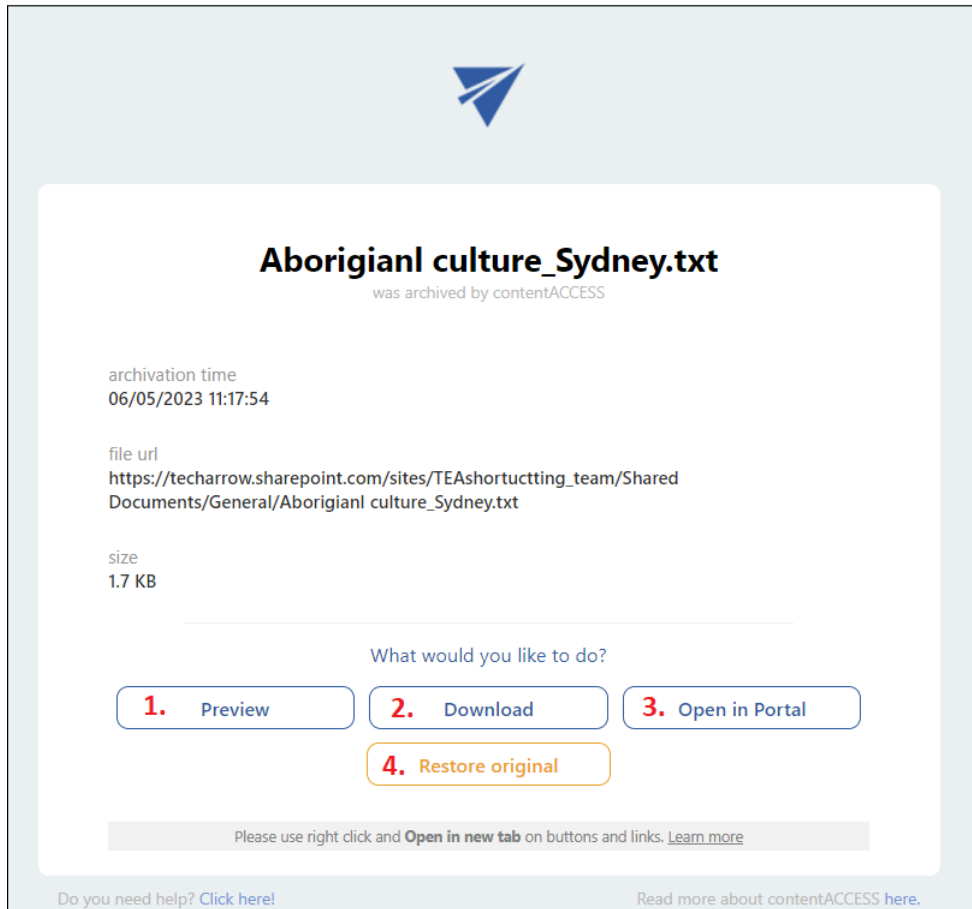
Documents > General

Name	Modified	Modified By	File Size	Version
Archive date	June 4	Szilvia Kelemen	6 items	1.0
_93589064_gettyimages-51332451.jpg.html	May 29	SharePoint App	4.79 KB	13.0
10 thing you should know about Sicily.docx...	May 29	SharePoint App	5.20 KB	16.0
1001book you should read.xlsx.html	May 29	SharePoint App	5.15 KB	13.0
2011-ford-fiesta-owners-manual.pdf.html	June 5	SharePoint App	4.79 KB	18.0
2016-18-college-catalog-north-seattle-coll...	May 29	SharePoint App	4.83 KB	12.0
2020-renault-master-115052.pdf.html	May 29	SharePoint App	4.78 KB	12.0
22815-best-of-dakotas-1c.jpg.html	May 29	SharePoint App	4.77 KB	15.0
Aboriginal culture_Sydney.txt.html	May 22	SharePoint App	4.78 KB	13.0

2. The selected file will be opened on the same tab – here, the user can open, share, copy, download (etc..) the file, close this tab, or carry out the activities related to the shortcut opening.



3. In this tab, the following **shortcut opening-related** options are available for the user with some basic information as well – archivation date, file URL (location of the item on Teams), and size:



1. **Preview** – the file’s preview can be opened by clicking the **Preview button** or the right mouse button (recommended to use this method) and the option “Open link in a new tab”. The user will be redirected to the [Preview service](#) page, where the original file will be shown. From here, the user can download the original file or save it as PDF.
2. **Download** – this button allows the user to **download the original file** (instead of the shortcut) to the local machine. if the user does not use the right mouse button and the “Open link in a new tab” option, he needs to go back to the previous page manually when the item is downloaded by clicking the **Back** button.
3. **Open in Portal** – this option allows the user to check the **archived item** in the contentACCESS Portal. In the Portal, the user can see the version history of the selected file, check the item and/or file preview, download the document, or see all other items from the same folder. For more information about the **item preview in Portal**, refer to the [Item list and item preview](#) section of the manual.
4. **Restore original** – it is also possible to **restore the shortcut to the original file** from here. In this case, the selected item is opened in the **Portal**, and the restoring process appears in a pop-up window. When the process is finished, the user can open the restored file in SharePoint (opened



in a new tab) or cancel the action and stay on the Portal. This option works similarly to the [Recover selected item\(s\)](#) function in the Portal.

