Facilitator's Guide

Using Enterprise Vault

Webinar

> Training and Development

Computershare

Version Information

Version History:

Date	Version	Author	Details
2/22/12	V 0.2	John Chislett	2nd draft
10/13/15	V 1.1	John Chislett	Revised 1st edition
10/28/15	V 1.2	John Chislett	Revised 1st edition
12/1/15	V 1.3	John Chislett	Revised 1st edition

Contents

Course Description

COURSE TITLE	Using Enterprise Vault Webinar
COURSE CODE	NA231
COURSE DESCRIPTION	This course provides participants with an overview of Enterprise Vault system. Enterprise Vault frees up Outlook mailbox space by safely archiving emails in a virtual vault. All your emails remain easily accessible from within MS Outlook, without having to worry about running out of mailbox space.
PRIOR KNOWLEDGE	N/A
AUDIENCE	We designed this course for all NA Computershare employees that use MS Outlook.
FOCUSING OBJECTIVES	By the end of this course, participants will be able to:

By the end of this course, participants will be able to:

- Recognize each step in the archiving process (i.e. Enterprise Vault rules)
- Recognize best practices for mailbox management.
- Search Archive Explorer to locate archived emails and calendar items.
- Search Vaults to locate archived emails and calendar items.
- Manually archive items.
- Restore items to MS Outlook.
- Locate Enterprise Vault QRGs.

Training Preparation

LOCATION OF COURSE FILES	Course materials can be located under: Z:\Training CIS\Team Member Files\John Ch\Work in Progress\Enterprise Vault
HANDOUTS & MATERIALS TO BE PREPARED	All reference guides can be found on the Training Development site at: Z:\Training CIS\CPU Tech Courses\Enterprise Vault - Email Archive
MIC	Delivery>BAU-NA- Technical Training> NA-Virtual Sessions- Using Enterprise Vault
SYSTEM ACCESS: MANAGER PREP	Managers will need to ensure that all attendees have access to Enterprise Vault and the TotaraLMS website.
SYSTEM ACCESS: FACILITATOR PREP	Ensure that you have Outlook open prior to the start of your session. **Note**: Ensure that any confidential Emails cannot be read by viewers.
EQUIPMENT REQUIRED	Make sure that you have access to GoToWebinar, Enterprise Vault, a computer and a phone with a headset.

ROOM PREPARATION

As this session is designed as a webinar, there is nothing to prepare in a room

REGIONAL CONSIDERATIONS

When scheduling the webinar, ensure you are taking into account the different time zones.

PREPARATORY READING FOR FACILITATOR

Required Reading
- Facilitator Guide
- Enterprise Vault QRGs

Optional Reading
Not applicable

UPDATED DECEMBER 2015

Course Timeline

Duration (mins)	Segment Name	Resources required
5 mins	Welcome and introduction	
10 mins	Accessing enterprise Vault	
20 mins	Searching in Enterprise Vault	
10 mins	Search Archive Explore	
10 mins	Working with Emails and Attachments that are still archived	
10 mins	Restoring Archived Emails	
5 mins	Wrap up and Conclusion	
	Total course time: 1 hour	

Welcome & Intro

Segment duration: Y minutes

Facilitator's Notes:		
Label	**Label**	Welcome everyone, my name John Chislett and I am one of the trainers with Computershare and am located out of the Canton office. **IMPORTANT:** Depending on how many people are in the session, say one of the following bullets: • (If there is a small number of participants) I have taken everyone off mute, please feel free to ask questions as we go. • (If there are a large number of participants)...I have everyone on Mute for the presentation.... As you have questions, make sure you capture and submit them using the chat function. **NOTE:** To do this, look towards the top right of your screen, there should be a red arrow...if you click on the arrow a box will open which will have a chat box in it....you can type in your question and hit enter......the question will be sent to myself and the panellist on the line.

Segment 1 – Accessing Enterprise Vault

Segment duration: 10 minutes
Related Focusing Objective(s):

- accessing and using Enterprise Vault

Instructional Phase: Preparation (Duration: x mins)		Instructional Techniques
Facilitator's Notes:		
Access Enterprise Vault		Enterprise Vault archives mail items from your mailbox and safely stores them in Vaults.... If there is a need to access an item that has been archived, you can easily view it from within Outlook.
		Enterprise Vault will archive mail items and attachments such as spreadsheets and word documents from your mailbox....
		Enterprise Vault – Archive Process rules:
		• Over 30 days; less than 7 years.
		• Less than 1 year of emails and calendar items in MS Outlook.
		• Deleted and Draft items do not get archived.
		• You lose your option to preview emails when they are archived.
		TO DO/SAY: Just a refresher, let's take a quick look at the QRGs that are posted out on Totara LMS. If you go to Totara LMS, click on the **Other Systems** link under **Other Systems Sites** and locate **Enterprise Vault** you will notice that there are several QRGs posted here. The information we are going to cover today is captured in these QRGs.
		TO DO: Make sure Outlook is displayed and all confidential Emails cannot be viewed.
		From Microsoft Outlook, please notice the Enterprise Vault tab at the top of the Outlook. When you select the Vault tab there are 3 icons that involve Enterprise Vault:
	Search Vaults	• **Search Vaults**: looks for Emails that have been archived
		• **Archive Explorer**: this button brings up a web page where you can browse your archived email in their original folders and subfolder structure...just as if you
	Archive Explorer	

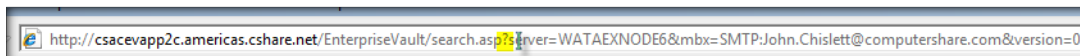| Instructional Phase: Preparation (Duration: x mins)		Instructional Techniques
		were searching your inbox and folders • **Store**: allows you to manually archive emails still in your mailbox Throughout our time together today we will be covering each of these. As you view your inbox, there are two icons that you will want to be aware of: • Stub: indicates an Email has been archived; you can safely delete these Emails....To read the entire Email, double click to open. **TO DO: Manually store an Email to show the next icon:** • when this icon is displayed, it indicates that the Email (or Emails) is in the process of being archived....IMPORTANT – you do not want to delete or move these Emails until the picture switches to the stub...if you do – it will not archive. Now that we have run through some of the basic navigation tools, the first thing we are going to do is get in and search for some information, look at how to complete an advanced search and then how to use wildcards & other options. **TO DO:** Click on the **Search Vaults** icon **PAUSE...BREATHE**

Segment 2 – Searching in Enterprise Vault

Segment duration: 20 minutes

Related Focusing Objective(s):

- completing searches in Enterprise Vault
- using Wildcards and Advanced Search options

Instructional Phase: Preparation (Duration: 20 mins)		Instructional Techniques
Facilitator's Notes:		
Search Vaults	**Label**	When you click on the Search Vaults icon it opens a Windows Explorer window.
		Let's read through the screen first:
		• **Vault:** By clicking on the drop down arrow, this allows you to select the "Inbox" you would like to search.....If you would like to search multiple or all of the ones you have access to, select **All Vaults**
		• **Subject:** your subject line
		• **Author or Recipient:** that would be whomever sent or received the Emails
		• **Dates:** searching a specific date range will enable you to narrow down the results
		• **Results:** Items and Details (show options available)
		• **Brief:** returns the author and subject of item
		• **Medium:** returns all details of the item
		• **Full:** returns all details of item and first few lines of content
		Once the search criteria have been entered, click the **Search** button.
		The Emails most related to your search criteria will be displayed.
		## PAUSE...BREATHE
Advanced Search		If after you have entered your search criteria you are still having a hard time, you can perform an advanced search that will allow you to enter more detailed criteria.
		First, click on **Search button** located under the criteria to the left of the **Clear button**.
		Then, in the Windows Explorer address bar, edit the URL by deleting all the text back to the "?" character

http://csacevapp2c.americas.cshare.net/EnterpriseVault/search.asp?server=WATAEXNODE6&mbx=SMTP:John.Chislett@computershare.com&version=0

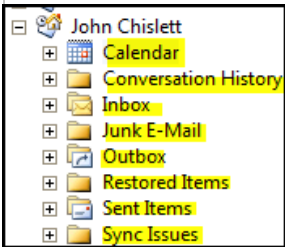| Instructional Phase: Preparation (Duration: 20 mins)		Instructional Techniques
		and type in the word ADVANCED. This will open the Advanced features. The biggest advantage is that you get to search by content and subject at the same time. Advanced will reopen any time after you've opened it unless you close and reopen Outlook. **TO DO:** Walk through the following: • The top half of the screen is exactly the same as the standard search screen...the only addition here is that when you look at each of the drop down arrows, there are more options • In advanced search, there is the ability to search by **attachments** and related information • **Sort Results By:** this allows you to have your results sorted by an additional criteria....(**TO DO:** Click drop down arrow to display) **Results:** demonstrate the **Items** and the increase in # of messages/page up from 50 max to 500 **PAUSE...BREATHE**
Wildcards		**SAY:** Have you ever found that you are looking for an Email or attachment and are not quite sure how to find it?... Enterprise Vault provides some wild card options that allow for users to find those hard to locate items. These include: • Search by more than one word: enter multiple words in any line to search for items that contains one or both of those words **TO DO: Enter COSMOS Training in the Subject line......**Click back on **Search** • Search for part of a word....enter a minimum of 3 characters, followed by an * **TO DO: Enter Train* in subject line**....click back on Search when done • Include or exclude words by using the plus (+) or minus (-) characters **TO DO: Enter COSMOS –training (with space between 2 words) in subject line**...this is to exclude anything that is related to COSMOS training but will still bring back results on COSMOS.....If you wanted to include COSMOS and Training all in the subject line, you would add the +......**Click back on Search when done**

Instructional Phase: Preparation (Duration: 20 mins)		Instructional Techniques
		Search for a phrase: if looking for a specific phrase, enclose the words in quotation marks are by using a period between the words....for example: **TO DO: Enter SkillSoft. license.....CLICK back on Search when done** **SAY:** Now that we have gone through some search options, and additional tips to help narrow your search, let's look at one last option available before we move onto working with the archived Emails. **PAUSE...BREATHE**

Segment 3 – Search Archive Explorer

Segment duration: 10 minutes
Related Focusing Objective(s):

- restoring and using archived Emails

Instructional Phase: Preparation/ Presentation (Duration: 10 mins)	Instructional Techniques
Facilitator's Notes:	

Using Archived Emails		**Facilitator Note:** When you click the Archive Explorer icon, it opens the Archive Explorer within Windows Explorer. All of the archives are in folders on the left hand pane. Clicking the plus icon next to a folder will list the contents of the folder.

If, for example, if you select your folder you will see folders like:

- Calendar
- Conversation History
- Inbox
- Junk E-Mail
- Outbox
- Restored Items
- Sent Items
- Sync Issues

Subfolders will also be shown if you hit the plus icon next to any folder that contains subfolders. If you click directly onto a folder, it will show a list of archived mail in the right-hand pane. The archived email will open when you double click it. Then you can work with it like a normal email.

Any email or calendar item over 1 year (and less than 7 years) displays in this view. Make sure to set Search

- **Age**-to the time period you are looking for
  - Created dates
  - Modified dates
- **Message**- Find within Inbox
- **In folder**- In the specific folder(s)
  - Current folder
  - Selected folders
  - And subfolders
- **Archived**- Select the range of the archived items to

Instructional Phase: Preparation/ Presentation (Duration: 10 mins)		Instructional Techniques
		search • **Addressing**- Find messages that were To/From • **Size**- Find items that are sized: ○ Between ○ Less than ○ Greater than ## Important Points: • Ignore **#NA TORU China Room** mailbox (this is a system glitch) • Search for emails using the same view you have in **MS Outlook** (folder structure). • Do not forget to search suborders. • Show display options (preview pane) • Demo how to download an item. (if time permits) **TO DO:** Click on the **Archive Explorer** button in Outlook. Click on the newly opened internet page and demonstrate/explain the following: **Notice:** towards the top left of my screen you will see the Inboxes that I have access to...I will have to make sure that I have selected the correct Inbox prior to searching. • **Calendar:** notice across the top, it will show you the number of pages and allow you to navigate • **Folders:** this will be a replica of the folders you currently have in your Inbox along with folders you may have deleted • **Inbox and Sent Items** • **TO DO:** In the Inbox....open one of the Emails.....towards the top right you will see 4 icons ▪ **Search:** brings up the search window should you need to look for specific Emails. **Search:** brings up the search window should you need to look for feature. *Remember to search subfolders! Use the Checkbox.* ▪ **Download:** opens the Email ▪ **Restore:** restores the Email to the Inbox ▪ **Help** **Say:** For those of you that like the reading pane in Outlook....you can do this here as well...

Instructional Phase: Preparation/ Presentation (Duration: 10 mins)		Instructional Techniques
		==Select any Email and right click on it.....Choose **Display Options** and then **Preview Pane**== **PAUSE...BREATHE**

Segment 4 – Working with Emails and Attachments that are still archived

Segment duration: 10 minutes
Related Focusing Objective(s):
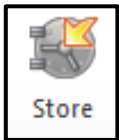
- restoring and using archived Emails

Instructional Phase: Preparation/ Presentation (Duration: 10 mins)		Instructional Techniques
Facilitator's Notes:		
Using Archived Emails		**Facilitator Note:** Make sure you have switched back to the Vault.
		SAY: Once you have completed a search, the Vault provides the ability to work with Emails and attachments from within the vault.
		TO DO: change vault to Patricia Klein....Enter Patricia in the Author field and click Search
		SAY: to work with any of these Emails, click on the subject line and it will open the Email in read only format......**IMPORTANT – Choose one with an attachment.**
		SAY: To work with the Email, click on **View whole item** in the gray tool bar (The toolbar at the top not the left) and a copy of the Email will be opened allowing you to view the whole thing.....
		SAY: Additionally, if there are attachments or links within the Email you will be able to still work with them...such as save or edit them if needed.
		TO DO: Open the attachment...saying how they will be able to save the file or link from here so that they will have easy access to it in the future....... For example, a link can be saved as a favourite on Internet Explorer.
		SAY: At this point, we have reviewed some tips for searching and working with archived Emails and attachments.... Next we will be looking at how to manually archive and restore Emails.
		PAUSE...BREATHE

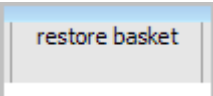# Segment 5 – Manually Archiving and Restoring Archived Emails

Segment duration: 10 minutes

Related Focusing Objective(s):

- work with Emails and Attachments that are still archived

Instructional Phase: Preparation/ Presentation (Duration: 10 mins)	Instructional Techniques
Facilitator's Notes:	

<table>
<tr>
<td>Manually Archiving an Email</td>
<td>Your mailbox is full.

600MB   600MB

Your mailbox is almost full.

504MB   600MB

Store</td>
<td>SAY: One thing to keep in mind is that Outlook will automatically archive Emails that are older than 30 days.

Mailbox Management Best Practices:

Your maximum mailbox size is 600MB.
You will not be able to send emails out once this max is reached.
Any emails you try to send are kept in your Outbox folder, until you've freed up space in your mailbox.
You will receive a notification email when you are close to and then when you have reached 600MBs.
Permanently delete all items/subfolders in Deleted Items folder each day.
Focus on deleting large items first (items with attachments, images/templates, and calendar entries).
Remember to clean-out Sent, Conversation History and Draft folders to save space.
You can delete archived items (but those items will remain on the server) and you will not be able to retrieve them.
You can manually store items (before the auto archive). Show them how to manually archive items.
For those individuals that are constantly reaching that limit, manually archiving Emails is an option to store excess Emails in the Vault and still have access to them.

Complete the following steps:

select the Email or Emails that need to be archived
click on the Store in Vault ( ) icon in the tool bar across the top of your screen</td>
</tr>
</table>

Instructional Phase: Preparation/ Presentation (Duration: 10 mins)		Instructional Techniques
		• Click OK to acknowledge that you would like to store the items in the Vault • This icon will display, [icon], indicating that the Email is in the process of being stored...remember you do not want to delete or move the Email until it has switched to the stub [icon], if you do it will not be vaulted. **PAUSE...BREATHE**
Restoring an Archived Email		**SAY:** Completing the steps for restoring an Email will bring an "unarchived" copy of the Email back to Outlook...... Let's look at those steps. **NOTE:** There are options for restoring Emails, based on the number and type of Emails that you would like to restore. **SAY:** Remember, that you are reducing your mailbox capacity when you restore items – beware, the more items that are in the mailbox the less room for additional emails! • The email will archive again after 30 days. • Restoring an item does not mean that you can delete it from EV. **Complete the following steps to restore a single Email:** • Complete a search for the Email in question. ☐ RE: Picture and description needed for Contact Us page Restore whole item [icon] [icon] • Click on the **Restore Whole Item icon** [icon] to the right of the subject line • Do not switch the default radio button from **a subfolder of the 'Restored Items' folder:** • Click the **Restore** button • If you switch over to Outlook (**NOTE:** DO THIS)...and click on the + sign to the left of **Restored Items** ⊞ 📁 Restored Items ... you will see the items that you have just restored....typically it will be stored in a folder with the date and time that you chose to restore the Email. **PAUSE...BREATHE**

Instructional Phase: Preparation/ Presentation (Duration: 10 mins)		Instructional Techniques
Restore multiple Emails		**Complete the following steps to restore multiple Emails from multiple searches:** • Complete a search for the Emails in question • Select the Emails that you wish to restore and click on **add to basket** **NOTE:** Make sure to complete any additional searches needed and add results to basket. • Click on **Contents** on the left hand side of the screen...the current contents of the basket will be displayed. • Click on **Restore Basket** in the gray tool bar here across the top of the screen and then switch over to Outlook. **PAUSE...BREATHE**

Wrap Up and Conclusion

Duration: 5 minutes		
Facilitator's Notes:		
		At this point, we have covered some steps and tips for searching in the Vault, working with and restoring Emails.
Conclusion		**SAY:** We have come to the end of the presentation...what I am going to do now is address any of the unanswered questions sent in via the chat room.....and/or any questions you may have on the line. **Facilitator Note:** If 25 or less people you can un-mute them if want to have a live discussion

Level 1 Eval / Transition		**Facilitator Note:** Make mention of where the material is located, please note that even though this is an online course, Thank you for attending
		We are sending you an evaluation email
		The evaluation email is a quick 2 minute survey
		We appreciate your feedback, if you don't have time, please keep the email as it does contain the link to other material we covered in this session.