

# Enterprise Vault™ Guide for Mac OS X Users

14.5

# Enterprise Vault™: Guide for Mac OS X Users

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# Contents

<b>Chapter 1</b>	<b>Introducing Veritas Enterprise Vault .....</b>	<b>4</b>
	About Enterprise Vault .....	4
	Required software for the Enterprise Vault Client for Mac OS X .....	5
	Installing the Enterprise Vault Client for Mac OS X .....	5
	About shortcuts to archived items .....	6
	About the Enterprise Vault toolbar and menu commands .....	6
	How Enterprise Vault selects the items to archive .....	8
	About retention of archived items .....	9
	Entering your login details for Enterprise Vault .....	9
	Viewing and amending your Enterprise Vault login password .....	10
	How grouping similar folders in Outlook for Mac affects Enterprise Vault Client behavior .....	11
<b>Chapter 2</b>	<b>Using Veritas Enterprise Vault .....</b>	<b>13</b>
	Viewing an archived item in its original form .....	13
	Replying to or forwarding an archived item .....	14
	Manually archiving items and folders .....	15
	Restoring archived items from shortcuts .....	15
	Deleting archived items .....	15
	Searching for your archived items .....	16
	Customizing Enterprise Vault .....	16
	Setting up a mailbox rule to manage your Enterprise Vault shortcuts .....	17
	Uninstalling the Enterprise Vault Client for Mac OS X .....	19

# Introducing Veritas Enterprise Vault

This chapter includes the following topics:

- [About Enterprise Vault](#)
- [Required software for the Enterprise Vault Client for Mac OS X](#)
- [Installing the Enterprise Vault Client for Mac OS X](#)
- [About shortcuts to archived items](#)
- [About the Enterprise Vault toolbar and menu commands](#)
- [How Enterprise Vault selects the items to archive](#)
- [About retention of archived items](#)
- [Entering your login details for Enterprise Vault](#)
- [Viewing and amending your Enterprise Vault login password](#)
- [How grouping similar folders in Outlook for Mac affects Enterprise Vault Client behavior](#)

## About Enterprise Vault

Enterprise Vault archives the contents of all the folders in your mailbox to a special storage area that is called a *vault*. Enterprise Vault runs automatically and usually does its archiving at off-peak times. You may also be able to archive items manually.

Most administrators set up Enterprise Vault so that there is a shortcut in your mailbox to each archived item. You can access the archived item by clicking the shortcut and then clicking the Enterprise Vault toolbar buttons and menu commands.

# Required software for the Enterprise Vault Client for Mac OS X

You can install the Enterprise Vault Client for Mac OS X on any computer that meets the following requirements:

- Mac OS X version 10.15 (Catalina) or later
- One of the following versions of Outlook for Mac:
  - Outlook for Mac 2019 version 16.17 or later
- Safari version 7.0 or later

For the latest information on supported versions of software, see the Enterprise Vault [Compatibility Charts](#).

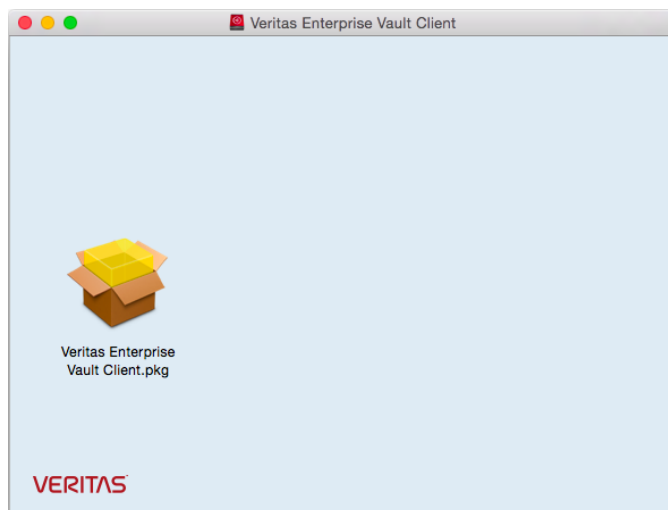
## Installing the Enterprise Vault Client for Mac OS X

The installation package for the Enterprise Vault Client for Mac OS X is a standard disk image (.dmg) file that you can run in the normal way.

### To install the Enterprise Vault Client for Mac OS X

- 1 Quit any applications that are running, as they might interfere with the installation.
- 2 Double-click the supplied `VeritasEnterpriseVaultClient.version.dmg` file.

The **Veritas Enterprise Vault Client** window appears.



- 3 Double-click **Veritas Enterprise Vault Client.pkg** to start the installation.
- 4 Follow the on-screen instructions.

The installation package prompts you to quit and reopen the package to complete the installation. This is normal behavior.

## About shortcuts to archived items

When Enterprise Vault archives an item, it normally leaves a shortcut to the item in your mailbox. This shortcut is a direct link to the archived item in a vault.

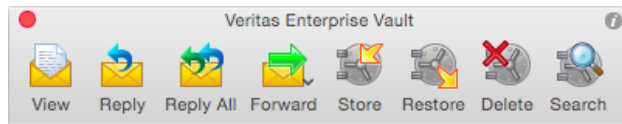
An archived item looks like any other item in your mailbox. For example, if the item is an email message, your email client displays the title of the original message, the date on which you received it, and the author.

By clicking the Enterprise Vault toolbar buttons and menu commands, you can work with the items in your vault. You can also manually archive the items that Enterprise Vault has yet to archive.

## About the Enterprise Vault toolbar and menu commands

By default, after you install the Enterprise Vault Client, an Enterprise Vault toolbar appears when you start your email client. This toolbar provides facilities with which you can store items in your archive, restore them, and interact with your archive in other ways.

**Figure 1-1** The Enterprise Vault toolbar



The following buttons may be available on the Enterprise Vault toolbar, depending on how your administrator has set up Enterprise Vault. Similar facilities may also be available on the Enterprise Vault Client application menu.

**Table 1-1** Enterprise Vault toolbar buttons and menu commands

Toolbar button	Menu command	Description
—	Hide/Show Toolbar	Turns the Enterprise Vault toolbar on and off.

**Table 1-1** Enterprise Vault toolbar buttons and menu commands (*continued*)

Toolbar button	Menu command	Description
	View	Downloads the selected item from the vault and opens it in its original form.  See <a href="#">"Viewing an archived item in its original form"</a> on page 13.
	Reply	Lets you reply to the sender of the selected item.  See <a href="#">"Replying to or forwarding an archived item"</a> on page 14.
	Reply to All	Lets you reply to the sender and all recipients of the selected item.
	Forward	Lets you forward the selected item to one or more recipients. The forwarded item includes any attachments that arrived with the original item.
—	Forward as Attachment	Lets you create a new email message with the selected item as an attachment to it.
	Store in Vault	Archives the selected item when Enterprise Vault next performs an archiving operation on your mailbox.  See <a href="#">"Manually archiving items and folders"</a> on page 15.
	Restore from Vault	Restores the item that is associated with the selected Enterprise Vault shortcut.  See <a href="#">"Restoring archived items from shortcuts"</a> on page 15.
	Delete from Vault	Deletes the selected item from the vault.  See <a href="#">"Deleting archived items"</a> on page 15.
	Search Vaults	Searches for archived items in the available vaults.  See <a href="#">"Searching for your archived items"</a> on page 16.

**Table 1-1** Enterprise Vault toolbar buttons and menu commands (*continued*)

Toolbar button	Menu command	Description
—	Login	Lets you submit your user credentials for communicating with the Microsoft Exchange server.
—	Enterprise Vault Preferences	Lets you set your preferences for the Enterprise Vault toolbar.  See <a href="#">“Customizing Enterprise Vault”</a> on page 16.
—	Enterprise Vault Help Topics	Displays online Help for Enterprise Vault.
—	About Enterprise Vault	Provides version information on Enterprise Vault.

## How Enterprise Vault selects the items to archive

Enterprise Vault selects items to archive from your mailbox in one or both of the following ways:

- Archiving by age of item. Enterprise Vault archives items automatically as soon as they reach the specified age.  
 The age of a mail message is taken from the date you received it or sent it. The age of a document is taken from the date when it was last modified.
- Archiving to keep your mailbox below its size limit. Enterprise Vault archives the oldest items in your mailbox until the mailbox contains a certain percentage of free space.

When both of these strategies apply, Enterprise Vault first archives items by age. If age-based archiving does not free enough space in your mailbox, Enterprise Vault archives more items until the required percentage of space is free.

Archiving by age and archiving by percentage of mailbox size limit are the main strategies for selection of items to archive. The administrator may also have configured Enterprise Vault so that it archives large items first. This has the advantage that mailbox space is recovered by archiving relatively few items.

The administrator can lock the setting that controls the archiving strategy so that you cannot change it.

## About retention of archived items

When Enterprise Vault archives an item, it automatically assigns a retention category to the item. The retention category specifies how long to keep the item. For example, your administrator may specify a retention period of five years from the date on which Enterprise Vault archived the items. Alternatively, your administrator may specify that the retention period ends on a particular date, such as December 31 2021, or even specify that the items are retained forever.

Enterprise Vault deletes items in your vault when their retention period has ended.

Your administrator can set up different retention categories for different types of data, such as Business or Legal.

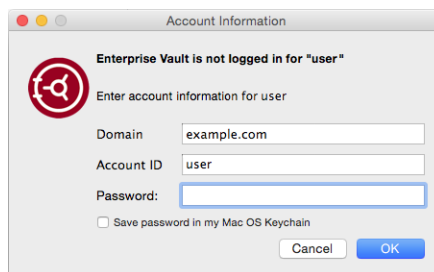
You can use Enterprise Vault Search to find items in your vault that have a particular retention category. Depending on how your administrator has set up Enterprise Vault, you may be able to choose the retention category that you want to assign to an item when you manually store it in your vault. You may also be able to use Enterprise Vault Search to change the retention category that is assigned to an item in your vault.

## Entering your login details for Enterprise Vault

Before you can use the facilities on the Enterprise Vault toolbar and application menu, you may need to log in to Enterprise Vault.

### To enter your login details for Enterprise Vault

- 1 On the Enterprise Vault Client application menu, choose **Login**.
- 2 In the Account Information dialog box, enter the credentials for your Microsoft Exchange account.



Depending on how you have configured your Microsoft Exchange account, some of the fields in this dialog box may contain information that Enterprise Vault has retrieved from your email client.

- 3 Choose whether to save the password in your Mac OS X keychain.

When the Enterprise Vault toolbar connects to the Exchange server, your keychain can provide the password so that you do not have to type it each time.

- 4 Click **OK**.

## Viewing and amending your Enterprise Vault login password

If you choose to save your password in the Mac OS X keychain when you first log in to Enterprise Vault, you can later view and amend the password by using the Keychain Access application.

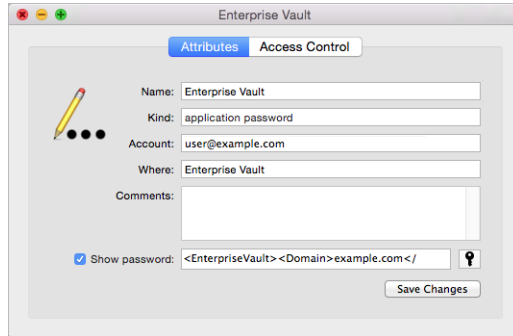
### To view and amend your Enterprise Vault login password

- 1 Open Keychain Access.
- 2 If keychains are hidden then, on the **View** menu, choose **Show Keychains**.
- 3 Double-click the **Enterprise Vault** keychain.

## How grouping similar folders in Outlook for Mac affects Enterprise Vault Client behavior

- 4 Click **Show password**, and then enter the keychain password if you are asked for it.

Keychain Access displays your Enterprise Vault login password in the **Show password** field.



Note that Enterprise Vault stores your password in XML format, like this:

```
<EnterpriseVault>
  <Domain>domain_name</Domain>
  <UserId>user_id</UserId>
  <Password>password</Password>
</EnterpriseVault>
```

- 5 Amend the password, if necessary, and then click **Save Changes**.

## How grouping similar folders in Outlook for Mac affects Enterprise Vault Client behavior

Outlook lets you configure as many email accounts as you need, and, by default, it groups all the accounts' Inboxes under a single heading in the folder list. Outlook also consolidates Drafts, Sent Items, Deleted Items, and Junk E-mail folders. This feature can make it easier to read all your messages at once, but it affects the behavior of the Enterprise Vault Client in the following ways:

- You cannot log in to Enterprise Vault if you are working in an empty grouped folder or a grouped folder in which you have yet to select any items. You must select at least one item in the folder before you try to log in.
- While you work in a grouped folder, every button on the Enterprise Vault Client toolbar appears to be available. This is the case even if you have yet to log in

## How grouping similar folders in Outlook for Mac affects Enterprise Vault Client behavior

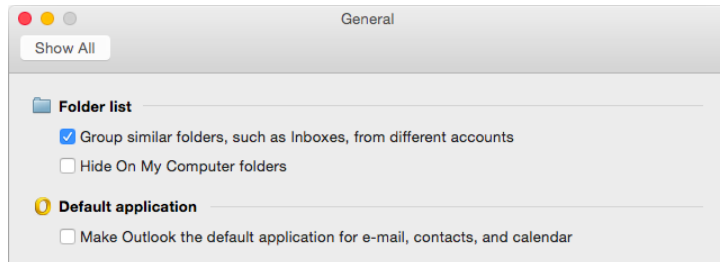
to Enterprise Vault and even if your administrator has set up Enterprise Vault to hide certain buttons on the toolbar.

- You cannot archive a grouped folder.

If this behavior causes you any issues, you may prefer to display separate folders for each email account.

### To display separate folders for each account

- 1 On the **Outlook** menu, click **Preferences**.
- 2 Under **Personal Settings**, click **General**.
- 3 Under **Folder list**, clear **Group similar folders, such as Inboxes, from different accounts**.



# Using Veritas Enterprise Vault

This chapter includes the following topics:

- [Viewing an archived item in its original form](#)
- [Replying to or forwarding an archived item](#)
- [Manually archiving items and folders](#)
- [Restoring archived items from shortcuts](#)
- [Deleting archived items](#)
- [Searching for your archived items](#)
- [Customizing Enterprise Vault](#)
- [Setting up a mailbox rule to manage your Enterprise Vault shortcuts](#)
- [Uninstalling the Enterprise Vault Client for Mac OS X](#)

## Viewing an archived item in its original form

When Enterprise Vault archives an item, it may leave a shortcut in your mailbox. The shortcut is a direct link to the archived item in your vault. To retrieve an archived item and open it in its original form, follow the procedure below. This procedure does not restore the original item back to your mailbox.

**To view an archived item in its original form**

- 1 Select the item that you want to view.
- 2 Click **View** on the Enterprise Vault toolbar or application menu.

If the item is not immediately available, Enterprise Vault shows the shortcut contents instead. You can then choose to restore the item to your mailbox.

## Replying to or forwarding an archived item

If you want to reply to or forward an archived item, use the facilities on the **Enterprise Vault** toolbar or application menu to do so. Clicking the standard **Reply** and **Forward** buttons in your email client opens the shortcut for the archived item instead of retrieving and opening the original item.

Note the following limitations on the Enterprise Vault **Reply**, **Reply to All**, and **Forward** facilities when you select more than one item at once in your mailbox:

- The **Reply** and **Reply to All** facilities are not available. You must select one item only to use these facilities.
- The **Forward** command on the Enterprise Vault Client application menu is not available. The **Forward** button on the toolbar is available but performs the same function as the **Forward as Attachment** option.

**To reply to or forward an archived item**

- 1 Select the items that you want to reply to or forward.
- 2 Click the appropriate option on the **Enterprise Vault** toolbar or application menu.



Reply

Lets you reply to the sender of the selected item.



Reply to All

Lets you reply to the sender and all recipients of the selected item.



Forward

Lets you forward the selected item to one or more recipients. The forwarded item includes any attachments that arrived with the original item.



Forward as Attachment

Lets you create a new email message with the selected item as an attachment to it.

## Manually archiving items and folders

Enterprise Vault performs automatic archiving in the background and does not require any action from you, but there may be occasions when you want to archive items manually. You can perform this operation if your administrator has set up Enterprise Vault to permit it.

### To archive items and folders manually

- 1 Select one or more items or folders that you want to archive.  
Note that you cannot archive a complete mailbox.
- 2 Click **Store** on the toolbar or, on the Enterprise Vault Client application menu, choose **Store in Vault**.
- 3 If you want to archive a folder, choose whether to archive its subfolders as well.

## Restoring archived items from shortcuts

You do not normally need to restore items to your mailbox because you can easily open them by clicking the **View** button on the Enterprise Vault toolbar. If you do restore items, they are restored in their original form. For example, if a restored item is an email message, you can still reply as normal.

Enterprise Vault may take some time to restore any items that are stored offline.

If there is no shortcut to an item that you want to restore, use the Enterprise Vault Search feature to find and restore the item.

### To restore archived items from shortcuts

- 1 In your mailbox, select the shortcuts to items that you want to restore.  
Use the normal facilities in your email client to select single or multiple shortcuts. You can include any items that are not shortcuts; Enterprise Vault ignores such items.
- 2 Click **Restore** on the toolbar or, on the Enterprise Vault Client application menu, choose **Restore from Vault**.

## Deleting archived items

If your Enterprise Vault administrator has given you permission to delete items from a vault, there are several ways to do so. You can also delete archived items from within the Enterprise Vault search applications.

### To use shortcuts to delete archived items

- 1 Select the shortcuts to the archived items that you want to delete.  
You can include any items that are not shortcuts. Enterprise Vault ignores such items.
- 2 Click **Delete** on the toolbar or, on the Enterprise Vault Client application menu, choose **Delete from Vault**.
- 3 Click **Yes** to confirm that you want to delete both the shortcuts and the archived items.

### To delete an item that you have opened from a shortcut

- 1 Click **Delete** on the toolbar of the opened item's window.
- 2 Click **Yes** to confirm that you want to delete the item.
- 3 Choose to delete the shortcut only or both the shortcut and the archived item.  
If you delete the shortcut only, you can later perform a search to retrieve the item.

## Searching for your archived items

If you have an Enterprise Vault shortcut to an archived item, you can easily use it to view or restore the item. However, if you do not have a shortcut, you can use the search facilities in Enterprise Vault to find and open the item.

### To search for your archived items

- 1 Click **Search** on the toolbar or, on the Enterprise Vault Client application menu, choose **Search Vaults**.
- 2 If Enterprise Vault prompts you for your logon details, type them and then click **OK**.  
If the logon dialog box does not have a separate **Domain** field, you must type your user name in the form *domain\_name\user\_name*.
- 3 Enter the search criteria, and then start the search.

## Customizing Enterprise Vault

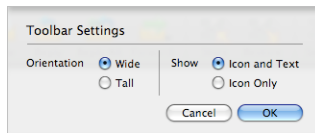
You can customize the appearance of the Enterprise Vault toolbar by changing its horizontal or vertical orientation and hiding the text labels on it. You can also set your system preferences for Enterprise Vault, such as choosing whether to hide or show the Enterprise Vault Client application menu on the menu bar.

### To customize the appearance of the Enterprise Vault toolbar

- 1 Click the settings icon at the top right of the Enterprise Vault toolbar.



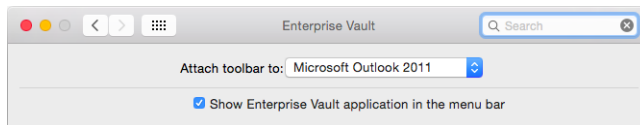
- 2 Set the orientation of the toolbar to horizontal (**Wide**) or vertical (**Tall**), and choose whether to show the text labels on the toolbar.



- 3 Click **OK**.

### To set your system preferences for Enterprise Vault

- 1 On the Enterprise Vault Client application menu, choose **Enterprise Vault Preferences**.



- 2 In the **Attach toolbar to** box, select the email client with which to associate the Enterprise Vault toolbar.
- 3 Select or clear **Show Enterprise Vault application in the menu bar**.

If you choose to hide the Enterprise Vault Client application menu, you can restore it later by clicking **Apple menu > System Preferences** and then clicking **Enterprise Vault**.

## Setting up a mailbox rule to manage your Enterprise Vault shortcuts

In the list of email messages in your mailbox, Enterprise Vault shortcuts look like unarchived messages. Shortcuts do not have a special icon or other identifying feature to make them more distinguishable. Therefore, to determine whether a message has been archived or not, you must open it or display a preview of it.

By setting up a mailbox rule, you can manage your shortcuts in ways that give them more prominence in the message list. For example, you can instruct the client to

apply a color-coded category to each message that Enterprise Vault has archived. Then you can tell at a glance whether an email message is a shortcut or an unarchived message.

See the documentation that accompanies your email client for more information on how to perform the following steps.

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**Note:** These steps apply color-coding to existing shortcuts but not to the shortcuts that Enterprise Vault has yet to create. You must periodically repeat the final step in the procedure to color-code the latest shortcuts.

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### To set up a mailbox rule to apply color-coding to your shortcuts

- 1 Click **Categorize** on the **Home** tab and then click **Add New**.
- 2 Create a category that is called, for example, "Archived", and choose a color to associate with it.
- 3 On the **Tools** menu, click **Rules**.
- 4 Click the **Exchange** option.
- 5 Click the option to add a new rule.

The **Edit Rule** dialog box appears.

- 6 Set up a rule that has the following characteristics:

If this condition is met	The message body contains the text in the banner of the shortcut (typically, "This message has been archived").
--------------------------	---

Do the following	Set the message category to the category that you created in step 2.
------------------	--

- 7 Select all the items in the message list.
- 8 Point to **Rules** on the **Message** menu, and then click **Apply** and the name of your rule.

## Uninstalling the Enterprise Vault Client for Mac OS X

When you have no further use for the Enterprise Vault Client for Mac OS X, you can uninstall it.

### To uninstall the Enterprise Vault Client for Mac OS X

- 1 In the Finder, browse to the following folder:  
`/Library/Application Support/Enterprise Vault`
- 2 Run the `UnInstaller.app` application.
- 3 Open Keychain Access.
- 4 If keychains are hidden, choose **View > Show Keychains**.
- 5 Delete the **Enterprise Vault** item.