

Enterprise Vault™ Guide for Outlook Users (Light Functionality)

15.2

Enterprise Vault™: Guide for Outlook Users

Last updated: 2025-07-08.

Legal Notice

Copyright ©2025 Arctera US LLC. All rights reserved.

Arctera and the Arctera Logo are trademarks or registered trademarks of Arctera US LLC or its affiliates in the U.S. and other countries. Other names may be trademarks of their respective owners. This product may contain third-party software for which Arctera is required to provide attribution to the third party ("Third-party Programs"). Some of the Third-party Programs are available under open source or free software licenses. The License Agreement accompanying the Software does not alter any rights or obligations you may have under those open source or free software licenses. Refer to the Third-party Legal Notices document accompanying this Arctera product or available at:

<https://www.arctera.io/license-agreements>

The product described in this document is distributed under licenses restricting its use, copying, distribution, and de-compilation/reverse engineering. No part of this document may be reproduced in any form by any means without prior written authorization of Arctera US LLC and its licensors, if any.

THE DOCUMENTATION IS PROVIDED "AS IS" AND ALL EXPRESS OR IMPLIED CONDITIONS, REPRESENTATIONS AND WARRANTIES, INCLUDING ANY IMPLIED WARRANTY OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE OR NON-INFRINGEMENT, ARE DISCLAIMED, EXCEPT TO THE EXTENT THAT SUCH DISCLAIMERS ARE HELD TO BE LEGALLY INVALID. ARCTERA US LLC SHALL NOT BE LIABLE FOR INCIDENTAL OR CONSEQUENTIAL DAMAGES IN CONNECTION WITH THE FURNISHING, PERFORMANCE, OR USE OF THIS DOCUMENTATION. THE INFORMATION CONTAINED IN THIS DOCUMENTATION IS SUBJECT TO CHANGE WITHOUT NOTICE.

The Licensed Software and Documentation are deemed to be commercial computer software as defined in FAR 12.212 and subject to restricted rights as defined in FAR Section 52.227-19 "Commercial Computer Software - Restricted Rights" and DFARS 227.7202, et seq." Commercial Computer Software and Commercial Computer Software Documentation," as applicable, and any successor regulations, whether delivered by Arctera as on premises or hosted services. Any use, modification, reproduction release, performance, display or disclosure of the Licensed Software and Documentation by the U.S. Government shall be solely in accordance with the terms of this Agreement.

Arctera US LLC | www.arctera.io

Contents

Chapter 1	Introducing Arctera Enterprise Vault	5
	About Enterprise Vault and your Outlook mailbox	5
	About Vault Cache for Outlook users	7
	About Virtual Vault for Outlook users	7
	About working offline with Enterprise Vault	9
	About selection of items to archive	10
	About retention of archived items	11
	About retention folders	12
	About Enterprise Vault and Outlook conversations	13
Chapter 2	Setting up Enterprise Vault	14
	About setting up Enterprise Vault in Outlook	14
	Setting up your Vault Cache and Virtual Vault	15
	Showing or hiding your Virtual Vault	16
	Turning off your Outlook AutoArchive	16
Chapter 3	Enterprise Vault options and mailbox icons	17
	Enterprise Vault options on the Outlook ribbon	17
	Enterprise Vault page in Outlook Backstage view	21
	Enterprise Vault Office Mail App (Outlook 2013 and later)	21
	Enterprise Vault Outlook mailbox icons	23
Chapter 4	Working with archived items	24
	Viewing your archived items	24
	Searching for your archived items	25
	Replying to and forwarding your archived items	26
	Deleting your archived items	26
	Deleting items and folders from a Virtual Vault	27
	Canceling deletion of your archived items	28
Chapter 5	Storing and restoring items	29
	Storing your items manually	29
	Storing your folders manually	31

	Restoring your archived items	32
	Canceling your archiving and restore operations	33
Chapter 6	Managing Enterprise Vault archiving	34
	Synchronizing your Vault Cache	34
	Viewing and changing your Vault Cache properties	35
	Suspending or enabling archiving for your mailbox	36
Chapter 7	PST file migration	37
	About PST file migration	37
	Migrating PST files to Enterprise Vault	38
	Submitting PST files for migration	39
Chapter 8	Context-sensitive Help topics	40
	Enterprise Vault Properties page	40
	Enterprise Vault Properties page	41
	Enterprise Vault - Change Properties dialog box	41
	Vault Cache Properties: Status tab	41
	Vault Cache Properties: Details tab	42
	Vault Cache Properties: Options tab	46
	Vault Cache Properties: Vaults tab	46
	Vault Cache Properties: Virtual Vault tab	46
	Store Folder in Vault dialog box	47
	Could not store/restore/delete/cancel dialog box	47
	Enterprise Vault PST Migration page	49
	Enterprise Vault Migrate PST Files dialog box	50
	Submit PST file	51

Introducing Arctera Enterprise Vault

This chapter includes the following topics:

- [About Enterprise Vault and your Outlook mailbox](#)
- [About Vault Cache for Outlook users](#)
- [About Virtual Vault for Outlook users](#)
- [About working offline with Enterprise Vault](#)
- [About selection of items to archive](#)
- [About retention of archived items](#)
- [About retention folders](#)
- [About Enterprise Vault and Outlook conversations](#)

About Enterprise Vault and your Outlook mailbox

Enterprise Vault automatically moves emails and their attachments from the folders in your Outlook mailbox to an online storage area that is called a *vault*. This process is called *archiving*. Enterprise Vault runs automatically and usually performs archiving at off-peak times.

After Enterprise Vault archives emails, they remain available to you in Outlook in the following ways:

- Most administrators set up Enterprise Vault so that there is a *shortcut* in your mailbox to each archived email. A shortcut replaces the email in the mailbox folder and provides instant access to the archived email. The shortcut has the following special icon in the Outlook item list:



A shortcut looks like the original email and behaves in a similar way. For example, you can open an email from its shortcut, forward and reply to the email, and copy or move it to another folder. Your administrator can configure Enterprise Vault so that shortcuts expire after a certain time. An expired shortcut disappears from the mailbox, but the archived item is still in your vault.

- If your administrator has enabled it, Outlook displays your vault as a *Virtual Vault* in the Navigation Pane.

Your administrator can set up Enterprise Vault so that it archives Outlook items other than emails. If so, you may see archived Outlook calendar items, tasks, contacts, or notes in your Virtual Vault in the appropriate folder view.

Although archiving is automatic, your administrator may have set up Enterprise Vault so that you can choose to do any of the following:

- Store items in the vault yourself at any time. When you store an item, Enterprise Vault adds it to your vault as an archived item. Enterprise Vault treats the items that you have stored in the same way as any other archived item.
- Restore archived items; that is, move or copy archived items back into your mailbox in their original format. You do not need to restore archived items to forward them or reply to them, or to perform other actions.
- Migrate personal storage table (.PST) files to Enterprise Vault. Outlook automatically creates PST files to save email communication data locally. These files often appear in Outlook with a folder name of 'Personal Folders'. Enterprise Vault does not normally archive any information that is held in your PST files on your computer. However, depending on how your administrator has configured PST file migration either the administrator can archive these items for you or you can choose to migrate PST files to Enterprise Vault.

If you have access to more than one Microsoft Exchange account, note that you can only use Enterprise Vault actions on items in the primary mailbox. The primary mailbox is the first Exchange mailbox that was added to your Outlook profile.

See [“About Vault Cache for Outlook users”](#) on page 7.

See [“About Virtual Vault for Outlook users”](#) on page 7.

See [“About working offline with Enterprise Vault”](#) on page 9.

See [“Enterprise Vault options on the Outlook ribbon”](#) on page 17.

See [“Viewing your archived items”](#) on page 24.

See [“Replying to and forwarding your archived items”](#) on page 26.

See [“Storing your items manually”](#) on page 29.

See [“Restoring your archived items”](#) on page 32.

See [“About PST file migration”](#) on page 37.

About Vault Cache for Outlook users

Your administrator can make the *Vault Cache* feature available to you. A Vault Cache is located on your computer, and contains copies of the items that are in your online vault. You need a Vault Cache if you want to do the following:

- Access archived items from shortcuts when you are not connected to your corporate network.
- Use Virtual Vault.

Your administrator can choose whether your Vault Cache stores complete archived items or partial archived items. You cannot change this option. A partial archived item includes enough information for Virtual Vault to display it in the Outlook item list, but not the item's full content.

If your Vault Cache stores partial archived items, Enterprise Vault retrieves the full content from your online vault when it is required. For example, Enterprise Vault retrieves the full content of an archived item when you open the item from Virtual Vault. The type of Vault Cache (that is, whether it stores complete archived items or partial archived items) affects the accessibility of archived items when you work offline.

Enterprise Vault regularly synchronizes your online vault and your Vault Cache. Your administrator may also let you start the synchronization process yourself.

See [“About Virtual Vault for Outlook users”](#) on page 7.

See [“About working offline with Enterprise Vault”](#) on page 9.

See [“Setting up your Vault Cache and Virtual Vault”](#) on page 15.

See [“Synchronizing your Vault Cache”](#) on page 34.

See [“Viewing and changing your Vault Cache properties”](#) on page 35.

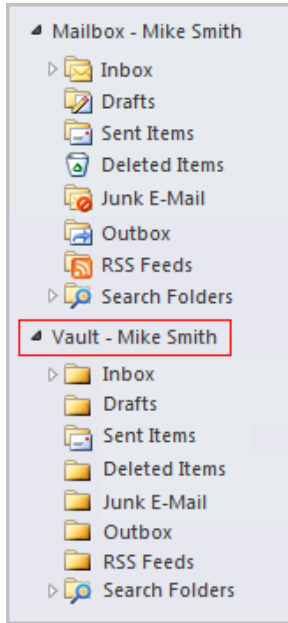
See [“About Enterprise Vault and your Outlook mailbox”](#) on page 5.

About Virtual Vault for Outlook users

If your administrator has enabled it, Outlook displays your vault in the Navigation Pane. This feature of Enterprise Vault is called *Virtual Vault*. A Virtual Vault

appears like a mailbox folder or personal folder in the Outlook Navigation Pane. [Figure 1-1](#) shows a mailbox and a Virtual Vault.

Figure 1-1 Example of a Virtual Vault



The contents of the selected vault are shown in the Outlook Navigation Pane. You can open items in your vault and perform the normal Outlook actions on items, such as forward, reply, move, and delete.

A Virtual Vault always shows you what is in your Vault Cache rather than what is in your online vault. A Virtual Vault may not be identical to your online vault if recent changes have not been synchronized.

Depending on how your administrator has set up Enterprise Vault, you may be able to move items into your vault for archiving. If you have permission to move items into your vault, the Virtual Vault includes these two search folders:

- | | |
|-------------------|--|
| Could Not Archive | Lists items that Enterprise Vault could not archive when it synchronized your Vault Cache with the online vault that is associated with your Outlook mailbox. |
| To Archive | Lists items that you have moved or copied into your Virtual Vault and that are awaiting archiving. The folder does not include items that Enterprise Vault could not archive for any reason. |

Note the following points about Virtual Vaults:

- You may be able to view the contents of shared archives and delegate archives in your Virtual Vault, but you cannot modify the contents.
- A Virtual Vault cannot contain public folder items.
- You cannot modify items by, for example, changing the content or read status, adding or changing a flag for follow up, and so on.
- All items in your Virtual Vault have a status of read.
- You may be able to move, delete, and rename Virtual Vault folders. However, you cannot do this if the folders exist in your mailbox or your administrator has designated them as *retention folders*.
See [“About retention folders”](#) on page 12.
- You cannot display the properties of a Virtual Vault folder.

See [“About Vault Cache for Outlook users”](#) on page 7.

See [“About working offline with Enterprise Vault”](#) on page 9.

See [“Setting up your Vault Cache and Virtual Vault”](#) on page 15.

See [“Showing or hiding your Virtual Vault”](#) on page 16.

See [“Storing your items manually”](#) on page 29.

See [“About Enterprise Vault and your Outlook mailbox”](#) on page 5.

About working offline with Enterprise Vault

When Enterprise Vault archives an item from your mailbox, it normally leaves a shortcut that links directly to the archived item. Replacing items with shortcuts saves space in your mailbox. However, if you work offline or you are not connected to your corporate network, double-clicking a shortcut cannot open the item in your online vault.

A Vault Cache provides instant access to archived items, even when you work offline or are not connected to your corporate network. After you have set up a Vault Cache, you can retrieve archived items in the following ways:

- Open the items from the corresponding shortcuts in your mailbox.
- Open the items from your Virtual Vault.

Note that your administrator may have set up your Vault Cache so that it stores partial archived items. With this type of Vault Cache, the full content of archived items is inaccessible when you do not have a connection to your online vault.

Another possibility is that your Vault Cache stores both partial items and the full content of items that you have opened when you work online. In this case, you can open any previously opened items, even when there is no connection to your online vault.

When you work offline, you cannot perform the following actions using Enterprise Vault buttons or commands:

- Store items in a vault.
- Restore items from Enterprise Vault shortcuts.
- Delete items from a vault.
- Migrate PST files to Enterprise Vault.

However, you can use your Virtual Vault to store, restore, and delete items. These actions take effect in the online vault after the next synchronization.

See [“About Vault Cache for Outlook users”](#) on page 7.

See [“About Virtual Vault for Outlook users”](#) on page 7.

See [“About setting up Enterprise Vault in Outlook”](#) on page 14.

See [“Showing or hiding your Virtual Vault”](#) on page 16.

See [“Viewing your archived items”](#) on page 24.

See [“Restoring your archived items”](#) on page 32.

See [“Synchronizing your Vault Cache”](#) on page 34.

See [“About selection of items to archive”](#) on page 10.

See [“About Enterprise Vault and your Outlook mailbox”](#) on page 5.

See [“About PST file migration”](#) on page 37.

About selection of items to archive

Enterprise Vault selects items to archive 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 performs age-based archiving first. 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 configure Enterprise Vault so that it archives large items first. Archiving large items first operates in addition to the main archiving strategy. Archiving large items first has the advantage that Enterprise Vault recovers mailbox space by archiving relatively few items.

Note: The archiving strategy is entirely under the control of the administrator. You cannot view or change the archiving strategy.

See [“About retention of archived items”](#) on page 11.

See [“About Enterprise Vault and your Outlook mailbox”](#) on page 5.

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.

About retention folders

Your administrator may have set up Enterprise Vault so that your vault contains one or more special folders, called *retention folders*. You can access these folders using facilities such as Virtual Vault and Enterprise Vault Search. In the sidebar of Enterprise Vault Search, retention folders have the following icon to distinguish them from standard folders:



Retention folders have the following features:

- Depending on how your administrator has set up Enterprise Vault Search, you may be able to copy and move items into and out of your retention folders. You can also add subfolders to your retention folders, if you want.
- The items in retention folders may have retention categories that those folders have imposed on them. For example, copying or moving an item into a retention folder may cause the item's retention category to change to one that the folder has imposed. Similarly, you may find that you cannot change the retention categories of items in a retention folder, even if you can change the retention categories of items elsewhere in your vault. Again, this behavior is dependent on how your administrator has set up Enterprise Vault.
- You cannot move, rename, or delete the retention folders that your administrator has set up in your vault. As their name suggests, retention folders are intended to be fixtures of your vault.
On the other hand, any subfolders that you personally add to your retention folders are not subject to the same restrictions. You can freely move, rename, and delete these personal subfolders.

About the relationship between Outlook mailbox folders and retention folders

If a folder in your Outlook mailbox has the same name and position in the folder list as a retention folder in your vault, Enterprise Vault archives the items from the mailbox folder into the retention folder.

Outlook lets you move and rename folders in your mailbox, but it is not advisable to do this when the folders are linked to retention folders. For example, suppose that your Outlook mailbox contains a folder called **Finance** and that this is linked to a retention folder with the same name in your vault. If you change the name of the mailbox folder to **Money**, Enterprise Vault does the following:

- When new items arrive in the **Money** mailbox folder, archives them to a retention folder that is also called **Money**.

- Renames the **Finance** retention folder as, for example, **Money1** (the new name with a digit at the end). This folder contains all the items that Enterprise Vault previously archived from the **Finance** folder in your mailbox. We strongly recommend that you move these items to suitable folders elsewhere in your vault, such as the **Money** retention folder. You can use Virtual Vault or Enterprise Vault Search to do this.

You may find that moving a folder in your mailbox produces similar results in your vault. For example, this may be the case when the mailbox folder is linked to a retention folder in your vault.

About Enterprise Vault and Outlook conversations

You can perform Enterprise Vault actions on items that are arranged as Outlook conversations. The actions operate in the same way as in the normal folder view. You have to select items within the conversation to perform Enterprise Vault actions on them, rather than selecting only the conversation header.

Outlook conversations can include unarchived items, Enterprise Vault shortcuts, and archived items that are in Virtual Vault.

You might select items from one or more conversations and then choose an Enterprise Vault action that cannot be performed on some of the items. In this case, Enterprise Vault does the following:

- It performs the action on the items for which it is possible.
- It displays a dialog box that lists the items for which the action was unsuccessful and gives the reasons.

For example, you might select the following and try to store them in Enterprise Vault:

- Some unarchived items that are in your Inbox
- Some unarchived items that are in Personal Folders
- Some items that are already in Virtual Vault

Enterprise Vault stores the unarchived items, and lists the Personal Folder items and the items that are already archived.

See [“About Virtual Vault for Outlook users”](#) on page 7.

See [“About Enterprise Vault and your Outlook mailbox”](#) on page 5.

Setting up Enterprise Vault

This chapter includes the following topics:

- [About setting up Enterprise Vault in Outlook](#)
- [Setting up your Vault Cache and Virtual Vault](#)
- [Showing or hiding your Virtual Vault](#)
- [Turning off your Outlook AutoArchive](#)

About setting up Enterprise Vault in Outlook

After Enterprise Vault is installed, it is immediately ready to use. However, if you want to use Vault Cache and Virtual Vault, you may need to do some further setting up.

If you can see your Virtual Vault in the Outlook Navigation Pane, you do not need to set up either the Virtual Vault or a Vault Cache. If a Virtual Vault does not exist, but your administrator has configured Enterprise Vault to let you use it, all you need to do is set up a Vault Cache.

See [“About Vault Cache for Outlook users”](#) on page 7.

See [“Setting up your Vault Cache and Virtual Vault”](#) on page 15.

See [“Showing or hiding your Virtual Vault”](#) on page 16.

See [“Turning off your Outlook AutoArchive”](#) on page 16.

See [“Synchronizing your Vault Cache”](#) on page 34.

See [“Viewing and changing your Vault Cache properties”](#) on page 35.

Setting up your Vault Cache and Virtual Vault

If a Vault Cache is not already set up, you can run the Vault Cache wizard. The wizard may start automatically when you open Outlook. If the wizard does not start automatically, follow the procedure below.

You need to run the wizard once only. The wizard sets up your Vault Cache, and starts synchronization for the first time. Synchronization is the process that keeps your Vault Cache up to date with your online vault.

You do not need to perform any further setup for Virtual Vault. When the first synchronization is complete, your Virtual Vault normally appears in the Outlook Navigation Pane. If it does not appear, you can choose an option to display it.

See [“Showing or hiding your Virtual Vault”](#) on page 16.

To set up a Vault Cache

- 1 Click the **File** tab and then click **Enterprise Vault**.
- 2 Click **Enable Vault Cache**.
- 3 On the first page of the Vault Cache wizard, select **Set up Vault Cache**, and then click **Next**.
- 4 If the next page includes the **Apply age limit** option, choose the maximum age of archived items to download automatically to your Vault Cache. This page appears only if your administrator has configured certain Enterprise Vault options.

To apply an age limit, follow these steps:

- Select **Apply age limit**.
- Enter a value for the maximum age of archived items to download automatically to your Vault Cache.
- Click **Next**.

If you do not want to apply an age limit, clear **Apply age limit**.

- 5 On the final page, click **Finish** to start synchronization.

See [“About Vault Cache for Outlook users”](#) on page 7.

See [“About setting up Enterprise Vault in Outlook”](#) on page 14.

See [“Synchronizing your Vault Cache”](#) on page 34.

See [“Viewing and changing your Vault Cache properties”](#) on page 35.

Showing or hiding your Virtual Vault

Your Virtual Vault normally appears automatically in the Outlook Navigation Pane after your Vault Cache has been set up. However, in some circumstances, you may need to take the following steps to make it visible.

To show or hide your Virtual Vault

- 1 Click the **File** tab and then click **Enterprise Vault**.
- 2 Click **Configure Vault Cache**.
- 3 On the **Virtual Vault** tab, select or clear your vault name to show or hide it in the Outlook Navigation Pane.
- 4 Click **OK**.

You can also hide your Virtual Vault by right-clicking it in the Outlook Navigation Pane and then clicking **Close "Vault - name"**.

See ["About Vault Cache for Outlook users"](#) on page 7.

See ["Setting up your Vault Cache and Virtual Vault"](#) on page 15.

See ["Turning off your Outlook AutoArchive"](#) on page 16.

Turning off your Outlook AutoArchive

Outlook AutoArchive is different from Enterprise Vault archiving. AutoArchive archives items to a personal folder (PST) file. Enterprise Vault archives items to a vault on your network. The archived items can be safely backed up, and you can view, search for, or restore them. Now that you use Enterprise Vault to archive items from your mailbox, we recommend that you turn off AutoArchive.

To turn off Outlook AutoArchive

- 1 Click the **File** tab and then click **Options**.
- 2 Click **Advanced**.
- 3 Under **AutoArchive**, click **AutoArchive Settings**.
- 4 Clear **Run AutoArchive every n days**.
- 5 Click **OK**.
- 6 To return to the previous view, close the **Outlook Options** dialog box.

See ["About setting up Enterprise Vault in Outlook"](#) on page 14.

Enterprise Vault options and mailbox icons

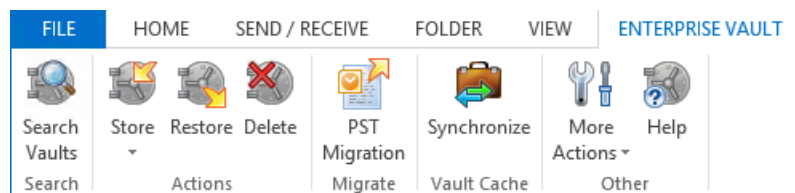
This chapter includes the following topics:

- [Enterprise Vault options on the Outlook ribbon](#)
- [Enterprise Vault page in Outlook Backstage view](#)
- [Enterprise Vault Office Mail App \(Outlook 2013 and later\)](#)
- [Enterprise Vault Outlook mailbox icons](#)

Enterprise Vault options on the Outlook ribbon

Depending on how your administrator has set up Enterprise Vault, a number of buttons may be available on the Enterprise Vault tab on the Microsoft Outlook ribbon.

Figure 3-1 Enterprise Vault tab in Outlook



The Other group may include a **More Actions** button. Your administrator can place Enterprise Vault options as commands on the **More Actions** menu, rather than directly as buttons on the Enterprise Vault tab. The following example shows the Cancel Operation command on the **More Actions** menu.

Figure 3-2 More Actions menu in Outlook

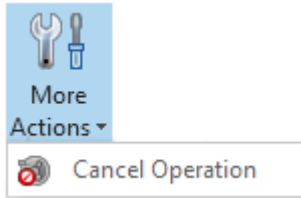


Table 3-1 lists all the options that may be on the Enterprise Vault tab or the More Actions menu. Some options have longer names when they are on the **More Actions** menu. The longer names are shown in brackets in this table. For example, the Restore option appears on the **More Actions** menu as Restore from Vault.

Table 3-1 Options on the Enterprise Vault tab or More Actions menu


Option	Icon	Description
Search Vaults		Search for archived items in the available vaults. See “Searching for your archived items” on page 25. If the Search Vaults button is on the Enterprise Vault tab, it also appears on the Outlook Search tab.

Table 3-1 Options on the Enterprise Vault tab or More Actions menu
 (continued)








Option	Icon	Description
Store (Store selected items in Vault and Store selected folder in Vault)		<p>Store the selected items or the selected folder.</p> <p>On the Enterprise Vault tab, click the upper part of the Store button to store the selected items. Click the lower part of the Store button to display two options: Store selected items and Store selected folder.</p> <p>On the More Actions menu, the options appear as Store selected items in Vault and Store selected folder in Vault.</p> <p>You can only use the Store options on items or folders in the mailbox, and not on items or folders in Virtual Vault.</p> <p>See “Storing your items manually” on page 29.</p> <p>See “Storing your folders manually” on page 31.</p>
Restore (Restore from Vault)		<p>Restore the items that are associated with the selected Enterprise Vault shortcuts.</p> <p>You can only use this option on items in the mailbox, and not on items in Virtual Vault.</p> <p>See “Restoring your archived items” on page 32.</p>
Delete (Delete from Vault)		<p>Delete archived items.</p> <p>You can only use this option on items in the mailbox, and not on items in Virtual Vault.</p> <p>See “Deleting your archived items” on page 26.</p>

Table 3-1 Options on the Enterprise Vault tab or More Actions menu
(continued)

Option	Icon	Description
Cancel (Cancel Operation)		<p>Cancel the Enterprise Vault operation that is currently in progress. You can cancel the following operations:</p> <ul style="list-style-type: none"> ■ Delete (Delete from Vault) ■ Store (Store selected items in Vault and Store selected folder in Vault) ■ Restore (Restore from Vault) <p>You can only use this option on items or folders in the mailbox, and not on items or folders in Virtual Vault.</p> <p>See “Canceling deletion of your archived items” on page 28.</p> <p>See “Canceling your archiving and restore operations” on page 33.</p>
PST Migration		<p>Migrate PST files to Enterprise Vault.</p> <p>See “About PST file migration” on page 37.</p>
Synchronize (Synchronize Vault Cache)		<p>Synchronize your Vault Cache with your online vault.</p> <p>See “Synchronizing your Vault Cache” on page 34.</p>
More Actions		<p>Display a menu containing one or more further Enterprise Vault commands.</p> <p>Your Enterprise Vault administrator controls whether options appear as buttons on the Enterprise Vault tab or as commands on the More Actions menu.</p>

See [“Enterprise Vault page in Outlook Backstage view”](#) on page 21.

See [“Enterprise Vault Office Mail App \(Outlook 2013 and later\)”](#) on page 21.




See [“Enterprise Vault Outlook mailbox icons”](#) on page 23.

Enterprise Vault page in Outlook Backstage view

Enterprise Vault adds its own page to the Outlook Backstage view. (The Backstage view is displayed when you click the Outlook File tab.) The Enterprise Vault page includes system information, and may include more Enterprise Vault buttons.

[Table 3-2](#) lists the Enterprise Vault buttons that may be on the Enterprise Vault page in the Backstage view.

Table 3-2 Enterprise Vault buttons in the Backstage view

Button	Icon	Description
Enable Vault Cache		Run the Vault Cache wizard. See “Setting up your Vault Cache and Virtual Vault” on page 15.
Configure Vault Cache		Open the Vault Cache properties. See “Viewing and changing your Vault Cache properties” on page 35.
Expiry Report		List the items that Enterprise Vault will delete from your vault because their retention period is about to end. If necessary, you can restore selected items to your mailbox.

See [“Enterprise Vault options on the Outlook ribbon”](#) on page 17.

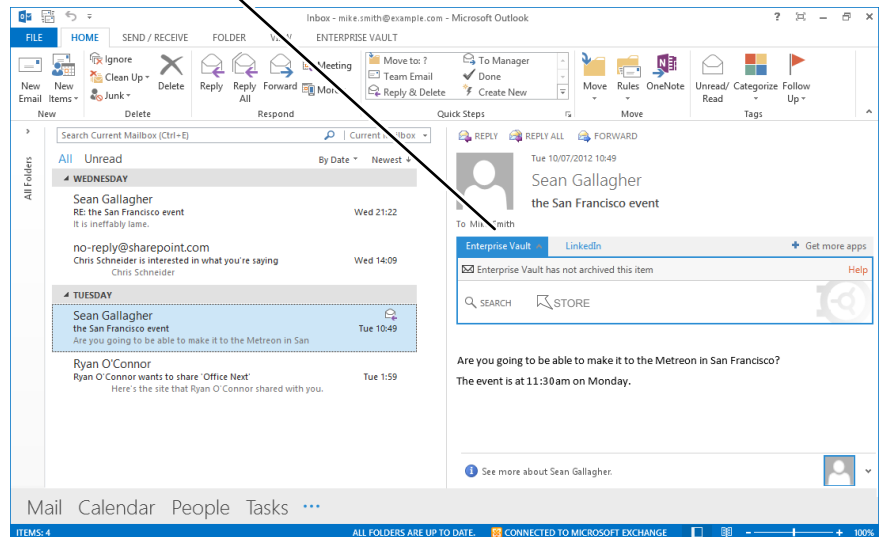
See [“Enterprise Vault Office Mail App \(Outlook 2013 and later\)”](#) on page 21.

See [“Enterprise Vault Outlook mailbox icons”](#) on page 23.

Enterprise Vault Office Mail App (Outlook 2013 and later)

In Outlook 2013 and later, most Enterprise Vault options on the Outlook ribbon are also available in the Enterprise Vault Office Mail App, if your administrator has enabled it. The Office Mail App appears at the top of the current email, calendar item, or meeting request.

Enterprise Vault Office Mail App



Note the following points about the Office Mail App:

- The options in the Office Mail App operate on the current item only. You cannot use them to perform actions on multiple items.
- Several factors determine which options are available in the Office Mail App. These factors include whether or not the current item is archived and how your administrator has set up Enterprise Vault.
- You can use the Office Mail App with emails, calendar items, and meeting requests only, and not with tasks, contacts, and other types of Outlook items. In addition, the Office Mail App is not available in draft items and in any items that you open from your Virtual Vault.
- The following options in the Office Mail App operate in slightly different ways than the equivalent options in the **Enterprise Vault** tab on the Outlook ribbon:

Restore	Restores the current item to the folder that contains the shortcut. You cannot choose an alternative folder in which to restore the item.
Store	Stores the current item without prompting you to choose a target vault. However, you may be able to choose a retention category, if your administrator has set up Enterprise Vault to permit this.

See “[Enterprise Vault options on the Outlook ribbon](#)” on page 17.





See “[Enterprise Vault page in Outlook Backstage view](#)” on page 21.

See [“Enterprise Vault Outlook mailbox icons”](#) on page 23.

Enterprise Vault Outlook mailbox icons

The items in your Outlook mailbox may be marked with the following icons.

Table 3-3 Enterprise Vault mailbox icons

Icon	Description
	Shortcut to archived item. You can double-click the shortcut to view the contents of the original item. You can forward or reply to the item, and perform other actions available in Outlook. Or you can select the shortcut and then restore the item to your mailbox.
	Pending archive. Enterprise Vault has marked the item for storage in a vault.
	Pending restore. You have chosen to restore the item from your vault. A restored item is the same as it was before it was archived. It has its original icon. A copy of the item remains in the vault.
	Pending deletion. You have chosen to delete the item from your vault. Enterprise Vault also deletes the shortcut from your mailbox.

See [“Enterprise Vault options on the Outlook ribbon”](#) on page 17.

See [“Enterprise Vault page in Outlook Backstage view”](#) on page 21.

See [“Enterprise Vault Office Mail App \(Outlook 2013 and later\)”](#) on page 21.

Working with archived items

This chapter includes the following topics:

- [Viewing your archived items](#)
- [Searching for your archived items](#)
- [Replying to and forwarding your archived items](#)
- [Deleting your archived items](#)

Viewing your archived items

When Enterprise Vault archives an item, it may leave a shortcut in your mailbox. The shortcut is a direct link to the archived item.

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.

You can also view archived items that are in your Virtual Vault.

To view an archived item

- 1 Select the shortcut to the item, or select the item in your Virtual Vault.
- 2 Do one of the following:
 - Use any of the normal Outlook actions to open the item.
 - If you use Outlook 2013 or later and can see the Office Mail App at the top of the current item, click **View** in the Office Mail App.

See [“Searching for your archived items”](#) on page 25.

See [“Replying to and forwarding your archived items”](#) on page 26.

See [“Deleting your archived items”](#) on page 26.

Searching for your archived items

After Enterprise Vault has archived an email or another Outlook item, you can find it with either Enterprise Vault Search or Outlook Instant Search. Enterprise Vault Search finds all items archived from your mailbox, File System, SharePoint and so on. Outlook Instant Search finds both archived items in your Virtual Vault and shortcuts in your mailbox.

If there is no shortcut to the archived item and you cannot find it in Virtual Vault, you can use the Search Vaults feature in Enterprise Vault to find and restore the item.

To search for your archived items with Search Vaults

- 1 Do one of the following:
 - On the **Enterprise Vault** tab on the Outlook ribbon, in the **Search** group or on the **More Actions** menu, click **Search Vaults**.
 - Click in the Outlook Instant Search box and then, on the **Search** tab, in the **Enterprise Vault** group, click **Search Vaults**.
 - If you use Outlook 2013 or later and can see the Enterprise Vault Office Mail App at the top of the current item, click **Search** in the Office Mail App.
- 2 If Enterprise Vault prompts you for your logon details, type them and then click **OK**.
- 3 Enter the search criteria, and then start the search.
- 4 If required, restore one or more items to your mailbox.

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**.

For more information on how to use Enterprise Vault Search, see the online Help that accompanies it.

See [“Replying to and forwarding your archived items”](#) on page 26.

See [“Deleting your archived items”](#) on page 26.

See [“Synchronizing your Vault Cache”](#) on page 34.

See [“Viewing your archived items”](#) on page 24.

Replying to and forwarding your archived items

You can reply to or forward an archived item from its shortcut, or from your Virtual Vault. Outlook opens the item in its original form, exactly as it does when you reply to or forward any other item.

If you select one or more shortcuts to forward as attachments, Outlook attaches the original items to a new email.

Note: When you forward archived items as attachments, wait until you can see the new email before you select any other items. Otherwise, items from your later selection may incorrectly be attached to the new email.

See [“Viewing your archived items”](#) on page 24.

See [“Searching for your archived items”](#) on page 25.

See [“Deleting your archived items”](#) on page 26.

Deleting your archived items

If your Enterprise Vault administrator has enabled you to delete items from a vault, you can do so in the following ways. You can also delete archived items through the search facilities in Enterprise Vault.

To delete archived items from shortcuts using an Enterprise Vault option on the Outlook ribbon

- 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 On the **Enterprise Vault** tab, in the **Actions** group, click **Delete**. Or on the **More Actions** menu, click **Delete from Vault**.
- 3 Click **Yes** to confirm that you want to delete both the shortcuts and the archived items.

The icons next to the items change to indicate a status of pending deletion.

To delete an archived item from its shortcut using the Enterprise Vault Office Mail App (Outlook 2013 and later)

- 1 Select the shortcut to the archived item that you want to delete.
- 2 In the Enterprise Vault Office Mail App, click **Delete**.
- 3 Click **OK** to confirm that you want to proceed.

To delete an item that you have opened from a shortcut

- 1 On the **Message** tab of the opened item's window, in the **Delete** group, click **Delete**.
- 2 Click **Yes** to confirm that you want to delete the item.
- 3 If a further prompt appears, choose to delete the shortcut only or both the shortcut and the archived item.

If you delete the shortcut only, the item remains in your online vault and you can still retrieve the item from your Virtual Vault.

See [“Deleting items and folders from a Virtual Vault”](#) on page 27.

See [“Canceling deletion of your archived items”](#) on page 28.

See [“About Enterprise Vault and Outlook conversations”](#) on page 13.

See [“Viewing your archived items”](#) on page 24.

Deleting items and folders from a Virtual Vault

Note that you cannot delete a folder from Virtual Vault if it exists in your mailbox or your administrator has designated it as a *retention folder*. On the other hand, any subfolders that you personally add to your retention folders are not subject to the same restrictions. You can freely move, rename, and delete these personal subfolders.

To delete items from a Virtual Vault

- 1 In a Virtual Vault folder, select the items that you want to delete.
- 2 On the **Home** tab, in the **Delete** group, click **Delete**. Or on the right-click menu, click **Delete**.

To delete a folder from a Virtual Vault

- 1 In your Virtual Vault, select the folder that you want to delete.
- 2 On the right-click menu, click **Delete Folder**.
- 3 In the prompt window that appears, click **Yes** to confirm the deletion or **No** to cancel it.

See [“About retention folders”](#) on page 12.

See [“Deleting your archived items”](#) on page 26.

See [“Canceling deletion of your archived items”](#) on page 28.

Canceling deletion of your archived items

If an item has a status of pending deletion, you may be able to stop Enterprise Vault completing the operation.

To cancel deletion of an archived item using an Enterprise Vault option on the Outlook ribbon

- 1 Select the items for which you want to cancel deletion.

You can include any items that Enterprise Vault is not processing. Enterprise Vault ignores such items.

- 2 On the **Enterprise Vault** tab, in the **Actions** group, click **Cancel**. Or on the **More Actions** menu, click **Cancel Operation**.

See [“Deleting your archived items”](#) on page 26.

See [“Deleting items and folders from a Virtual Vault”](#) on page 27.

See [“Storing your items manually”](#) on page 29.

See [“Restoring your archived items”](#) on page 32.

See [“Viewing your archived items”](#) on page 24.

Storing and restoring items

This chapter includes the following topics:

- [Storing your items manually](#)
- [Storing your folders manually](#)
- [Restoring your archived items](#)
- [Canceling your archiving and restore operations](#)

Storing your items manually

Enterprise Vault performs automatic archiving in the background, and does not require any action from you. However, there may be occasions when you want to store an item in your vault manually. You can store items manually if your administrator has set up Enterprise Vault to permit it.

There are several methods that you can use to store items manually, including the following:

- By clicking **Store** on the Enterprise Vault tab on the Microsoft Outlook ribbon.
- In Outlook 2013 and later, by clicking **Store** in the Enterprise Vault Office Mail App, if it is available.
- By moving or copying items to your Virtual Vault.

This method has some limitations: you cannot cancel archiving of any items that you store in this way, and you cannot store items from an Exchange managed folder, if your administrator has enabled archiving of such folders.

To store items using an Enterprise Vault option on the Outlook ribbon

- 1 In your mailbox, select one or more items to store.
- 2 On the **Enterprise Vault** tab, in the **Actions** group, click the upper part of the **Store** button. Or on the **More Actions** menu, click **Store selected items in Vault**.
- 3 Click **OK** to confirm that you want to store the items.

To store an item using the Enterprise Vault Office Mail App (Outlook 2013 and later)

- 1 Select or open the unarchived item that you want to store.
- 2 In the Enterprise Vault Office Mail App, click **Store**.

If Enterprise Vault does not prompt you to choose a retention category, you have completed the necessary steps. While storing is in progress, you can click **Cancel** to stop Enterprise Vault completing the action.
- 3 If Enterprise Vault prompts you to choose a retention category, open the **Select retention category** menu and select one. Enterprise Vault then displays the retention period and the retention category description.
- 4 Click **OK**.

To store items using Virtual Vault

- 1 Select one or more items to store.
- 2 Use any of the normal Outlook actions to move or copy the items into your Virtual Vault.

For example, you can store the items in the following ways:

- To move the items, drag them into the Virtual Vault folder where you want to store them. Or right-click them, and then click **Move** and select a Virtual Vault folder.
- To copy the items, hold down **Ctrl** and drag them into the Virtual Vault folder where you want to store them.

See [“About Enterprise Vault and Outlook conversations”](#) on page 13.

See [“Storing your folders manually”](#) on page 31.

See [“Restoring your archived items”](#) on page 32.

See [“Deleting your archived items”](#) on page 26.

See [“Canceling deletion of your archived items”](#) on page 28.

Storing your folders manually

Enterprise Vault performs automatic archiving in the background, and does not require any action from you. However, there may be occasions when you want to store a complete folder in your vault manually. You can select the entire contents of the folder and store the items manually. Alternatively, you can store a folder if your administrator has set up Enterprise Vault to permit it. You cannot store a complete mailbox.

You can use an option on the Enterprise Vault tab in Outlook to store a folder. If you have Virtual Vault enabled, you can also move or copy a folder to your Virtual Vault to store it.

To store a folder using an Enterprise Vault option

- 1 Select the folder to store.
- 2 On the **Enterprise Vault** tab, in the **Actions** group, click the lower part of the **Store** button and then click **Store selected folder**. Or on the **More Actions** menu, click **Store selected folder in Vault**.
- 3 Select or clear **Also store subfolders**.
- 4 Click **OK**.

To store a folder using Virtual Vault

- 1 Select a folder to store.
- 2 Use any of the normal Outlook actions to move or copy the folder into your Virtual Vault.

For example, you can store the folder in the following ways:

- To move the folder, right-click it. Then click **Move Folder** and select a Virtual Vault folder in the Move Folder dialog box.
- To copy the folder, right-click it. Then click **Copy Folder** and select a Virtual Vault folder in the Copy Folder dialog box.

See [“Deleting your archived items”](#) on page 26.

See [“Canceling deletion of your archived items”](#) on page 28.

See [“Storing your items manually”](#) on page 29.

See [“Restoring your archived items”](#) on page 32.

See [“About Virtual Vault for Outlook users”](#) on page 7.

Restoring your archived items

You do not normally need to restore archived items to your mailbox, as you can view them easily from their shortcuts or from Virtual Vault. If you do restore items, they are restored in their original format. For example, if a restored item is a mail message, you can still reply as normal.

You can restore archived items in either of the following ways:

- By using their shortcuts. Items that you restore from shortcuts are always restored to the current folder (where the shortcuts are).
- By using the normal Outlook actions to copy or move the items from your Virtual Vault to your mailbox.

If you want to restore items to a public folder, you must have Owner access to the folder. If you do not have Owner access, you can copy a shortcut from a public folder to your mailbox. Then you can restore the item to your mailbox.

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

To restore archived items from shortcuts using an Enterprise Vault option on the Outlook ribbon

- 1 If the shortcuts are in a public folder or a PST file, copy them to a folder in your mailbox.
- 2 In your mailbox, select shortcuts to items that you want to restore. Use the normal Outlook selection to select single or multiple shortcuts. You can include any items that are not shortcuts. Enterprise Vault ignores such items.
- 3 On the **Enterprise Vault** tab, in the **Actions** group, click **Restore**. Or, on the **More Actions** menu, click **Restore from Vault**.
- 4 Click **OK** to confirm that you want to restore the items. The original items are restored to your mailbox.

To restore an archived item from its shortcut using the Enterprise Vault Office Mail App (Outlook 2013 and later)

- 1 Select the shortcut.
- 2 In the Enterprise Vault Office Mail App, click **Restore**. While restoring is in progress, you can click **Cancel** to stop Enterprise Vault completing the action.

To restore archived items from a Virtual Vault

- 1 In your Virtual Vault, select the items that you want to restore. Use the normal Outlook selection to select single or multiple items.
- 2 Use any of the normal Outlook actions to move or copy the items into your mailbox.

For example, you can restore the items in the following ways:

- To move the items, drag them into the mailbox folder where you want to restore them. Or right-click them, and then click **Move to Folder** and select a mailbox folder in the Move Items dialog box.
- To copy the items, hold down **Ctrl** and drag them into the mailbox folder where you want to restore them.

See [“About Enterprise Vault and Outlook conversations”](#) on page 13.

See [“Searching for your archived items”](#) on page 25.

See [“Storing your items manually”](#) on page 29.

Canceling your archiving and restore operations

If an item in your mailbox has a status of pending archive or pending restore, you may be able to stop Enterprise Vault completing the operation.

You do not normally need to cancel archiving and restore operations. If you want to open an item that has a status of pending archive or pending restore, you can double-click it.

You cannot cancel archiving and restore operations on items in your Virtual Vault.

To cancel archiving and restore operations

- 1 Select the items for which you want to cancel the operation.

You can include any items that Enterprise Vault is not processing. Enterprise Vault ignores such items.

- 2 On the **Enterprise Vault** tab, in the **Actions** group, click **Cancel**. Or on the **More Actions** menu, click **Cancel Operation**.

See [“Storing your items manually”](#) on page 29.

See [“Restoring your archived items”](#) on page 32.

See [“Deleting your archived items”](#) on page 26.

Managing Enterprise Vault archiving

This chapter includes the following topics:

- [Synchronizing your Vault Cache](#)
- [Viewing and changing your Vault Cache properties](#)
- [Suspending or enabling archiving for your mailbox](#)

Synchronizing your Vault Cache

Enterprise Vault keeps your Vault Cache up to date by synchronizing it with the online vault that is associated with your Outlook mailbox.

The administrator may also have configured Enterprise Vault so that you can do the following:

- Synchronize the Vault Cache yourself at any time.
- Suspend synchronization. When you suspend synchronization, any current synchronization process stops and Enterprise Vault does not perform any further updates to your Vault Cache.

Note: Synchronization remains suspended even if you stop and restart Outlook, until you choose to resume synchronization.

- Synchronize your Vault Cache with additional vaults to which you have access.

Enterprise Vault automatically determines which items to download to your Vault Cache.

To synchronize your Vault Cache

- ◆ On the **Enterprise Vault** tab, in the **Vault Cache** group, click **Synchronize**. Or on the **More Actions** menu, click **Synchronize Vault Cache**.

The Vault Cache Synchronization dialog box provides summary information about the synchronization process. You can close the dialog box while synchronization is in progress, and continue to work with Outlook.

To suspend or resume synchronization

- 1 Click the **File** tab and then click **Enterprise Vault**.
- 2 Click **Configure Vault Cache**.
- 3 In the Vault Cache Properties, on the **Status** tab, click **Suspend** or **Resume**.

To choose additional vaults to synchronize with

- 1 Click the **File** tab and then click **Enterprise Vault**.
- 2 Click **Configure Vault Cache**.
- 3 In the Vault Cache Properties, click the **Vaults** tab.

If there is no **Vaults** tab, the administrator has not enabled this feature.

- 4 To choose an additional vault, select the box next to its name.
- 5 Click **OK**.

The additional vault appears in your Virtual Vault after the synchronization process has ended.

See [“Setting up your Vault Cache and Virtual Vault”](#) on page 15.

See [“Viewing and changing your Vault Cache properties”](#) on page 35.

Viewing and changing your Vault Cache properties

The Vault Cache Properties can contain up to five tabbed pages. The administrator controls which tabs are included.

If the appropriate tabs are available, the Vault Cache Properties let you do the following:

- Suspend or resume synchronization.
- Start synchronization.
- View synchronization progress.
- Set the disk space to use for the content of items in your Vault Cache.

- Set the amount of time after Outlook starts before Enterprise Vault checks for items to be synchronized to your Vault Cache.
- Choose vaults to synchronize with your Vault Cache, in addition to the main vault that is associated with your mailbox.
- Select the vaults that you want to see as Virtual Vaults in the Outlook Navigation Pane.

To view and change Vault Cache properties

- 1 Click the **File** tab and then click **Enterprise Vault**.
- 2 Click **Configure Vault Cache**.

The Vault Cache Properties contain one or more tabs. For information about the currently selected tab, click **Help** in the Vault Cache Properties.

See [“Synchronizing your Vault Cache”](#) on page 34.

Suspending or enabling archiving for your mailbox

When you first use Enterprise Vault, everything is usually set up so that Enterprise Vault archiving can start immediately. If you choose to suspend this automatic archiving, you can still choose to store items yourself.

Your administrator may prevent the Change option from appearing on the Enterprise Vault Mailbox Properties page. In this case, you cannot suspend archiving.

To suspend or enable archiving for your mailbox

- 1 In the Outlook Navigation Pane, right-click the mailbox and then click **Data File Properties**.
- 2 In the Mailbox Properties, click the **Enterprise Vault** tab.
- 3 Click **Change**.
- 4 In the Enterprise Vault - Change Properties dialog box, select or clear **Suspend Enterprise Vault archiving for this mailbox**.
- 5 Click **OK** in the Enterprise Vault - Change Properties dialog box.
- 6 Click **OK** or **Apply** in the Mailbox Properties.

See [“Storing your items manually”](#) on page 29.

See [“Synchronizing your Vault Cache”](#) on page 34.

PST file migration

This chapter includes the following topics:

- [About PST file migration](#)
- [Migrating PST files to Enterprise Vault](#)
- [Submitting PST files for migration](#)

About PST file migration

Enterprise Vault does not normally archive any information that is held in Personal Storage Table (PST) files on your computer, unless your administrator has enabled your mailbox for PST file migration. The administrator can archive these items for you or let you choose whether to migrate PST files to Enterprise Vault.

Depending on how your administrator has configured PST file migration you can do the following:

- View the status of PST files that are migrating or have migrated to Enterprise Vault.
- Choose whether to migrate PST files to Enterprise Vault.
- Submit PST files for migration.

You can continue to use your PST files to read and store items as normal during the migration. However, do not edit the items that are in the files because the changes may not be saved.

If any of your PST files is password-protected, you may be prompted for the password.

Depending on how your administrator has configured Enterprise Vault, the PST file is deleted when the migration successfully completes. You can use **Search**

Vaults to search for the items that have been archived or restore items using the **Restore** option.

See [“Migrating PST files to Enterprise Vault”](#) on page 38.

See [“Submitting PST files for migration”](#) on page 39.

See [“Searching for your archived items”](#) on page 25.

See [“Restoring your archived items”](#) on page 32.

Migrating PST files to Enterprise Vault

Enterprise Vault regularly checks for PST files on your computer. You can migrate the contents of the located PST files to Enterprise Vault.

If there are PST files listed that you do not want to migrate, remove them from the list using the **Remove** option on the **Migrate PST Files** dialog box. Note that the files are permanently removed from the list, but continue to exist on your computer.

If you choose to migrate the contents of the PST files later, you can submit the files to Enterprise Vault using the **Manually add a PST file** option. If you do not take any action, this list is incrementally updated with new PST files located on your computer.

To migrate PST files to Enterprise Vault

- 1 On the **Enterprise Vault** tab on the Outlook ribbon, in the **Migrate** group, click **PST Migration**.

All the located PST files are listed in the **Migrate PST Files** dialog box. By default, all the files are selected.

The Migrate PST Files dialog box can also be accessed using the **View located PST files** button.

Click **Not Now** to defer the migration until later.

- 2 Deselect any PST files that you do not want to migrate.
- 3 For each PST file that is selected for migration, select the retention category that you want to use from the list in the **Retention Category** column.
- 4 Click **Migrate**, and then click **OK** to confirm that you want to migrate the files.
- 5 If there are some files that you do not want to migrate, select only those files and click **Remove**. The selected files are removed from the list, but continue to exist on your computer.

See [“About PST file migration”](#) on page 37.

See [“Submitting PST files for migration”](#) on page 39.

Submitting PST files for migration

If your administrator has enabled your mailbox for the submission of PST files, you can submit PST files manually for migration to Enterprise Vault. Depending on how your administrator has set up PST submission, you may be able to change the retention category of the PST file that you choose to migrate to Enterprise Vault.

To submit a PST file to Enterprise Vault

- 1 On the **Enterprise Vault** tab on the Outlook ribbon, in the **Migrate** group, click **PST Migration**.
- 2 In the **PST Migration** dialog box, click **Manually add a PST file**.
- 3 In the **Submit PST file** dialog box, browse to select the file.
- 4 In the **Retention Category** list, select the retention category that you want to use.
- 5 Click **OK**.

See [“About PST file migration”](#) on page 37.

See [“Migrating PST files to Enterprise Vault”](#) on page 38.

See [“Searching for your archived items”](#) on page 25.

Context-sensitive Help topics

This chapter includes the following topics:

- [Enterprise Vault Properties page](#)
- [Enterprise Vault Properties page](#)
- [Enterprise Vault - Change Properties dialog box](#)
- [Vault Cache Properties: Status tab](#)
- [Vault Cache Properties: Details tab](#)
- [Vault Cache Properties: Options tab](#)
- [Vault Cache Properties: Vaults tab](#)
- [Vault Cache Properties: Virtual Vault tab](#)
- [Store Folder in Vault dialog box](#)
- [Could not store/restore/delete/cancel dialog box](#)
- [Enterprise Vault PST Migration page](#)
- [Enterprise Vault Migrate PST Files dialog box](#)
- [Submit PST file](#)

Enterprise Vault Properties page

This page tells you that Enterprise Vault archiving is enabled for the selected mailbox. The Change option opens the **Enterprise Vault - Change Properties**

dialog box, which lets you enable or suspend archiving for the mailbox. If there is no Change option, your administrator has locked the setting.

See [“About Enterprise Vault and your Outlook mailbox”](#) on page 5.

Enterprise Vault Properties page

The Enterprise Vault properties are not available when you work offline.

See [“About Enterprise Vault and your Outlook mailbox”](#) on page 5.

Enterprise Vault - Change Properties dialog box

This dialog box lets you enable or suspend archiving for the mailbox.

Note: After you click OK in this dialog box, you still need to click OK in the **Mailbox Properties** dialog box for a change to take effect.

The dialog box contains the following field:

Suspend Enterprise Vault archiving for this mailbox

Lets you turn archiving for the mailbox on or off. When you suspend archiving, Enterprise Vault does not archive any items from any folder in your mailbox. However, you can still store items in a vault yourself when you need to.

When you first use Enterprise Vault, your administrator may have suspended archiving to give you time to organize the information in your folders before archiving starts. To enable archiving, you must clear **Suspend Enterprise Vault archiving for this mailbox**.

See [“About selection of items to archive”](#) on page 10.

See [“About Enterprise Vault and your Outlook mailbox”](#) on page 5.

Vault Cache Properties: Status tab

This tab shows information about synchronization of your Vault Cache.

It also lets you suspend synchronization, or resume synchronization after you have suspended it. When you suspend synchronization, any current

synchronization process stops and Enterprise Vault does not perform any further updates to your Vault Cache.

Depending on how your administrator has set up Enterprise Vault, you may be able to move items into your vault for archiving. If Enterprise Vault has failed to archive the items in your Virtual Vault for any reason, you can try to archive them again by clicking **Retry**. The items that Enterprise Vault did not archive are in the Could Not Archive folder in your Virtual Vault.

Note: Synchronization remains suspended, even if you stop and restart Outlook, until you choose to resume synchronization.

See [“About working offline with Enterprise Vault”](#) on page 9.

See [“Synchronizing your Vault Cache”](#) on page 34.

See [“About Enterprise Vault and your Outlook mailbox”](#) on page 5.

Vault Cache Properties: Details tab

This tab shows information about your Vault Cache.

The Vault Cache synchronization process consists of the following:

- **Header synchronization:** updates your Vault Cache with information about archived items. For example, if you move a shortcut to a different mailbox folder, its location is updated in the Vault Cache.
- **Content synchronization:** downloads archived items to your Vault Cache, from one or more vaults.

Enterprise Vault can complete header synchronization before content synchronization. So the Content synchronization status may be **Synchronizing** when the Header synchronization status for one or more vaults is **Complete**.

The **Synchronize Now** button starts Vault Cache synchronization.

See [“Synchronizing your Vault Cache”](#) on page 34.

The following fields provide information about synchronization completion and start times.

Last completed

The date and time when header and content synchronization last completed.

Next scheduled

The date and time when header synchronization next starts. Header synchronization may also cause content synchronization to start.

The following fields apply to header synchronization:

Vault Name

Vaults that are synchronized with your Vault Cache.

Status

The status of header synchronization between your Vault Cache and each vault. The status is one of the following:

- **Initializing.** Enterprise Vault is fetching the list of vaults.
- **Pending.** You see this status during the period that is specified by the **Start checking after** setting on the **Vault Cache Properties: Options** tab.
- **Synchronizing.** Synchronization is in progress.
- **Complete.** The last synchronization is complete.
- **Never synchronized.** Your Vault Cache has never been synchronized with this vault.
- **Last synchronization was suspended.** You have clicked **Suspend** while synchronization was in progress.
- **Server busy ... Waiting.** The Enterprise Vault server is too busy to perform synchronization. Enterprise Vault automatically retries synchronization (before the next scheduled synchronization time).
- **Last synchronization was interrupted.** The last synchronization was interrupted by an unspecified cause. Enterprise Vault retries synchronization at the next scheduled synchronization time.
- **Failed.** Synchronization failed for an unspecified reason.

The Failed status may also indicate a reason, as follows:

Failed: Disconnected. No network connection is available.

Failed: Could not connect to server and **Failed: Server is too busy.** Synchronization failed because of problems on the Enterprise Vault server.

Failed: Insufficient disk space. There is insufficient disk space on your computer.

In each case, Enterprise Vault retries synchronization after an interval.

The following fields apply to content synchronization:

Current status	<p>The status of content synchronization. The status is one of the following:</p> <ul style="list-style-type: none">■ Initializing. Enterprise Vault is fetching the list of vaults.■ Pending. You see this status during the period that is specified by the Start checking after setting on the Vault Cache Properties: Options tab.■ Synchronizing. Synchronization is in progress.■ Complete. The last synchronization is complete.■ Never synchronized. Enterprise Vault has never synchronized your Vault Cache.■ Failed. Synchronization failed for an unspecified reason. The Failed status may also indicate a reason, as follows:<ul style="list-style-type: none">Failed: Item retrieval failed on server and Failed: Download failed. Synchronization failed because of problems on the Enterprise Vault server.Failed: Could not process all archives and Failed: Could not add an archive. Synchronization failed because Enterprise Vault could not process the required vaults.Failed: BITS not available for transfers. Synchronization failed because a Windows feature named BITS was not available.In each case, Enterprise Vault retries synchronization after an interval.
Items to download	The number of items to download to your Vault Cache.
Items to archive	The number of items to upload from your Vault Cache to an online vault.
Items in cache	The number of items in your Vault Cache.
Current cache size	The total size of items in your Vault Cache.
Maximum cache size	<p>The maximum amount of disk space for the content of items in your Vault Cache.</p> <p>To change this value, click the Vault Cache Properties: Options tab. Then change the value in the box named Maximum disk space to use.</p>

See [“About working offline with Enterprise Vault”](#) on page 9.

See [“About Enterprise Vault and your Outlook mailbox”](#) on page 5.

Vault Cache Properties: Options tab

This tab contains the following options for your Vault Cache:

Maximum disk space to use	The maximum disk space to use for the content of items in your Vault Cache.
Start checking after	The time to wait after Outlook starts before Enterprise Vault checks for any items that need to be synchronized to your Vault Cache. If you have a slow network connection, you may want to use this option to enable you to read mail before checking starts.

See [“About working offline with Enterprise Vault”](#) on page 9.

See [“Synchronizing your Vault Cache”](#) on page 34.

See [“About Enterprise Vault and your Outlook mailbox”](#) on page 5.

Vault Cache Properties: Vaults tab

This tab shows the name of the main vault that is associated with your Outlook mailbox. This vault may be the only one you can synchronize with your Vault Cache.

If you have access to one or more additional vaults, the tab lists them. To choose an additional vault to synchronize with your Vault Cache, select the box next to its name and click **OK**.

See [“About working offline with Enterprise Vault”](#) on page 9.

See [“Synchronizing your Vault Cache”](#) on page 34.

See [“About Enterprise Vault and your Outlook mailbox”](#) on page 5.

Vault Cache Properties: Virtual Vault tab

This tab lets you select the vaults that you want to see as Virtual Vaults in the Outlook Navigation Pane. You may see only your own vault in the list, or you may be able to see other vaults too.

If you clear the check box next to a vault name and click **OK**, that Virtual Vault immediately ceases to appear in the navigation pane.

To display a Virtual Vault in the navigation pane again, select the check box next to the vault name and click **OK**.

See [“About working offline with Enterprise Vault”](#) on page 9.

See [“Synchronizing your Vault Cache”](#) on page 34.

See [“About Enterprise Vault and your Outlook mailbox”](#) on page 5.

Store Folder in Vault dialog box

This dialog box lets you store the items in the selected folder and, optionally, all its subfolders. The only items that Enterprise Vault does not store are shortcuts and any items for which archiving is in progress.

Retention Category enables you to specify the retention category to be assigned to all items in the folders and subfolders. Click the **Name** arrow to see more options.

Note: You may not be able to change the retention category under the following conditions:

Condition: If the administrator has locked settings in the mailbox policy.

Condition: If the administrator has already specified a custom retention category for the folder or subfolder.

If you want to restore the folder, you can copy or move it from your Virtual Vault to your mailbox.

See [“Storing your folders manually”](#) on page 31.

See [“About Enterprise Vault and your Outlook mailbox”](#) on page 5.

Could not store/restore/delete/cancel dialog box

This dialog box lists the items for which an Enterprise Vault Store, Restore, Delete, or Cancel action has been unsuccessful.

When you select items in Outlook, an Enterprise Vault action may succeed for some of the items but fail for other items. The failures may occur because the items are of unsuitable types for the action, or because they are in invalid locations.

The dialog box contains the following fields.

Table 8-1 Dialog box fields

Field	Description
Subject	The subject of the item.
Folder	The folder in which the item is located. If the folder location starts with "\Mailbox", the folder is in your Outlook mailbox. If the folder location starts with "\Vault", the folder is in your Virtual Vault.

The items in the list are grouped under headings. The headings you may see, with some further information about the likely causes of the failures, are as follows.

Table 8-2 Dialog box headings

Heading	Further information
Item is not present in the online mailbox, try again later.	You have tried to store the item in a vault. The item exists only on your local computer, because Outlook has not yet synchronized it to your online mailbox.
Insufficient privileges to perform this operation.	An administrative policy prevents you from performing the operation. For example, you have tried to use Enterprise Vault Delete to delete an archived item, but your administrator has prevented deletion of archived items.
You cannot archive items from this location.	For example, one or more of the items that you tried to store cannot be archived because they are in a Personal Folder.
You cannot use "Store in Vault" in Virtual Vault. This item is already archived.	One or more of the items that you tried to store is in a Virtual Vault. A Virtual Vault, which you can view in the Outlook Navigation Pane, always contains only archived items.

You can do the following:

- Resize the dialog box to view more information.
- Resize the **Subject** and **Folder** columns by dragging the column divider line.
- Sort the items within each group by clicking the **Subject** or **Folder** headings.

See "[About Virtual Vault for Outlook users](#)" on page 7.

See [“About Enterprise Vault and Outlook conversations”](#) on page 13.

See [“About Enterprise Vault and your Outlook mailbox”](#) on page 5.

Enterprise Vault PST Migration page

This page lists the PST files that were found on your computer and that are migrating or have been migrated to Enterprise Vault. You can sort this list by clicking the column headings. You can also resize the columns by dragging the column divider line.

Depending on how your administrator has set up Enterprise Vault, you may see the following options:

- The **View located PST files** option opens the **Migrate PST files** dialog box, which lists the PST files that are located on your computer. You can choose to migrate the listed files to Enterprise Vault. If you cannot see this option, there are no PST files that need your attention.
- The **Manually add a PST file** option opens the **Submit PST file** dialog box, which lets you manually select PST files and migrate them to Enterprise Vault.

The dialog box contains the following fields:

Name	The name of the PST file.
Path	The path where the PST file resides.
Size	The size of the PST file, in kilobytes.
Retention Category	<p>The retention category that will be applied to the items in the PST file when they are archived.</p> <p>Note that certain Enterprise Vault features can override this retention category. For example, your administrator can choose to set up one or more folders, called retention folders, in your Enterprise Vault archive. If you migrate the contents of a PST file into a retention folder, the retention category that your administrator has selected for this folder may override the retention category that you select here.</p>

Progress

The status of migration. This status can be any of the following:

- **Migrating:** The file is currently migrating. For the files that are migrating, the progress bar displays the percentage of completion.
- **Failed:** The migration of the file has failed.
- **Queued:** The file is queued for migration.
- **Completed:** The migration has completed successfully.

Enterprise Vault Migrate PST Files dialog box

This dialog box lists all the PST files that Enterprise Vault has found on your computer. You can choose whether to migrate the contents of these files to Enterprise Vault. Depending on how your administrator has set up Enterprise Vault, the PST files may be removed from your computer when the migration completes.

All the files are selected by default. You need to do one of the following:

- Check whether the files you want to migrate are selected and click **Migrate**.
- If the list includes any files that you do not want to migrate, select those files and click **Remove**.

The selected files are removed from the list. These files continue to exist on your computer. If you choose to add these files for migration later, you can use the **Manually add a PST File** button on the PST Migration page.

- Click **Not now** to defer the migration until later.

The dialog box contains the following fields:

Name	The name of the PST file.
Path	The path where the PST file resides.
Size	The size of the PST file, in kilobytes.
Retention Category	The retention category that is assigned to the PST file. If your administrator has enabled it, you may be able to change the retention category of the PST file you choose to migrate.

Submit PST file

This dialog box lets you select PST files manually and migrate them to Enterprise Vault. If your administrator has enabled it, you may be able to change the retention category of the PST file that you choose to migrate.

The dialog box contains the following fields:

PST file	Browse to select the PST file you want to migrate to Enterprise Vault.
Retention Category	<p>The list of available retention categories. If available, you can select the retention category that you want to assign to the contents of the selected PST file.</p> <p>Note that certain Enterprise Vault features can override this retention category. For example, your administrator can choose to set up one or more folders, called <i>retention folders</i>, in your Enterprise Vault archive. If you migrate the contents of a PST file into a retention folder, the retention category that your administrator has selected for this folder may override the retention category that you select here.</p>