



GWAVA Inc.

# GWAVA<sup>®</sup> Retain<sup>™</sup>

For GroupWise<sup>®</sup>

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## Retain Publisher and Viewer

For version 3.4

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## Contents

Retain Publisher and Viewer .....	3
Retain Publisher Install .....	4
Retain Viewer Install .....	6
Retain Publisher .....	10
Retain Viewer .....	16
Forward .....	18
Redaction .....	19
Searching the Archive .....	21

## Retain Publisher and Viewer

Retain comes with the ability to export selected messages to a local archive for searching and viewing or to fulfill the need of a mobile archive for legal compliance. This can be extremely useful for larger systems or systems which have a high load, and where the need for review or legal compliance is being exercised, but access to the entire Retain archive is not necessary. Instead of allowing or facilitating constant access to the entire Retain Server, the Publisher can export and index groups of messages to a local archive, and the Viewer can search, view, and forward messages from the local archive.

The process is performed in two parts: the Publisher and the Viewer. The publisher, using an existing account with mail export rights, connects to the Retain Server and exports the messages complying with the search request, and creates a local database archive on the host machine. The viewer accesses the local archive and allows browsing, searching, and message exportation from the local archive.

### Requirements:

- Network connection to Retain Server
- .Net 3.5 SP1
- Windows XP, Vista, 7, 2003, or 2008. (32-bit or 64-bit)
- PST migration requires MS Office or Outlook installed. (32 and 64-bit systems are supported.)
- Retain user with rights to export mail  
(See User management in the Retain Administration Guide)

The Viewer can be run or be installed as stand-alone client wherever a published archive exists, but it is recommended to install the Viewer when you install the Publisher. While the Viewer and Publisher can be installed and run separately, the Viewer must have direct access to the published archive. Do not place the published archive on a network share. Accessing the published database from a remote machine may cause instability and is insecure. For this reason, it is best to use the Viewer local to the published archive.

The install files are located in the extracted Retain install sources tools folder.

.../retain/tools/publisher

Run the installers on the desired machine.



RetainPublish.exe

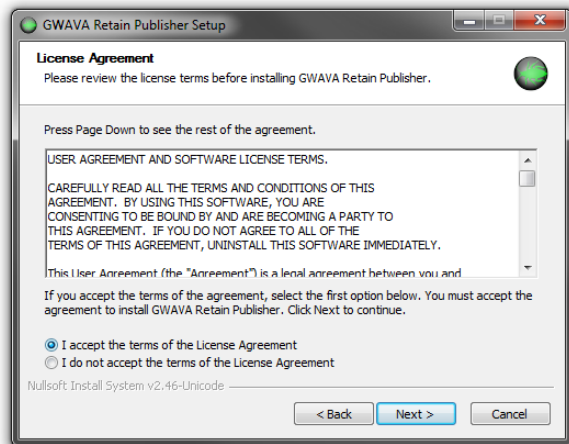


RetainViewer.exe

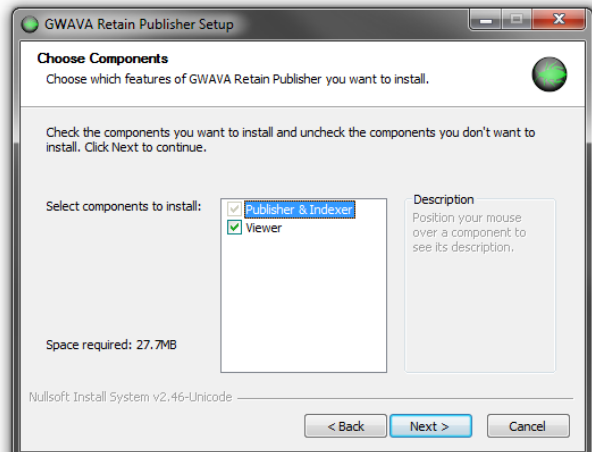
## Retain Publisher Install

The Retain Publisher installation is very similar to the Viewer installation. Basic questions are asked, and the installer checks for .NET 3.5 SP1 before copying or installing any files. Click 'Next' to continue.

The installer checks for any programs that need to be closed for installation. Close any applications specified and click 'Next'.

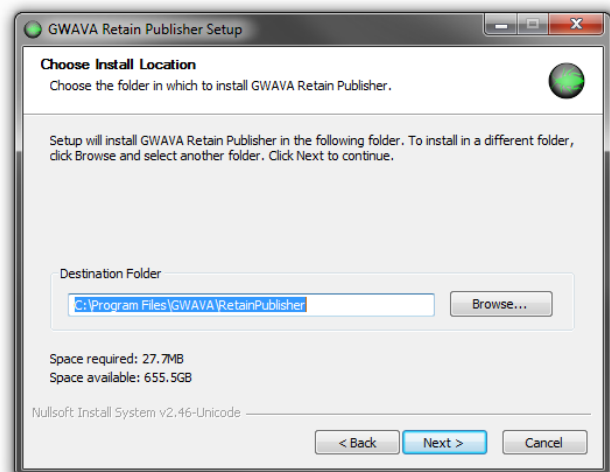


Read and accept the license agreement. Select 'Next' to continue.

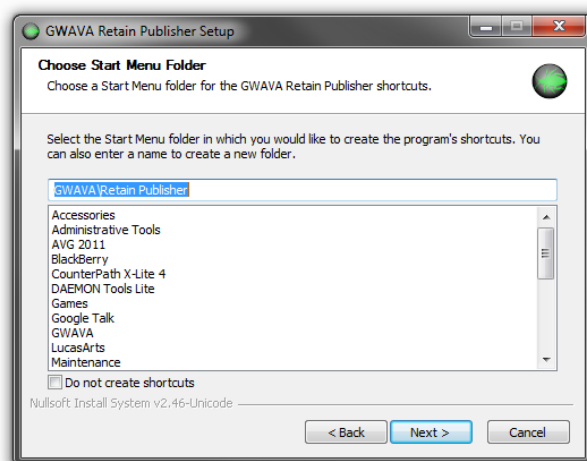


Because the Publisher is worthless without the Viewer, the Publisher installation provides the option to install the viewer alongside the publisher. If the viewer has already been installed, this is not necessary. It is recommended to have both the viewer and the publisher on the same machine. Select the desired setting and click 'Next' to continue.

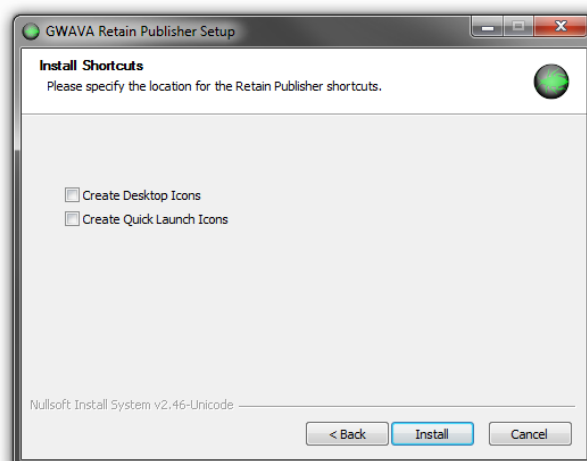
Select the install location. The default is shown. If the default location does not work for the system, browse to, or specify the desired install location.



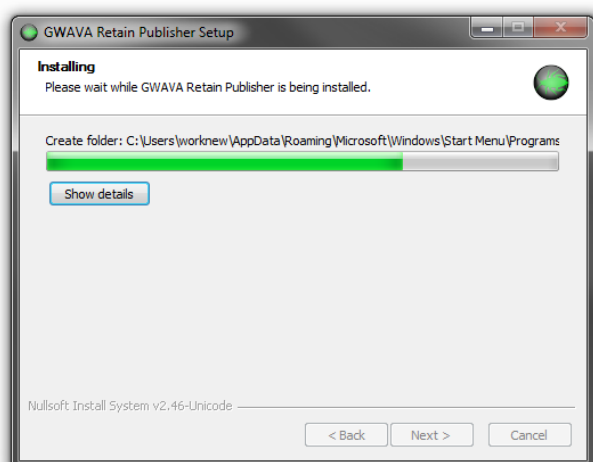
Select where to place start menu shortcuts, or select the 'Do not create shortcuts' option to keep the installer from creating any shortcuts in the start menu.



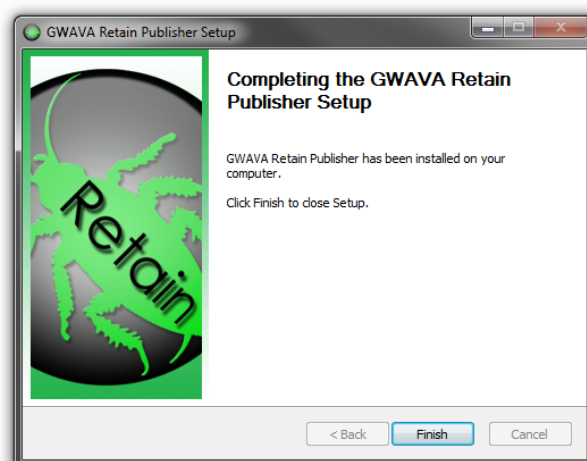
Select the desired desktop shortcut configuration. The installer can create Desktop or Quick Launch icons if desired. Default is shown



Select 'Install' to copy the program files and install the Publisher.



After the files have been copied, select 'Finish' to complete the installation.



## Retain Viewer Install

The Installation wizard goes through the general questions and checks for the required .NET 3.5 SP1 to be installed.

Click 'Next' to continue.

The install checks for any running programs that need to be shut down. Shutdown any needed applications and click 'Next'.

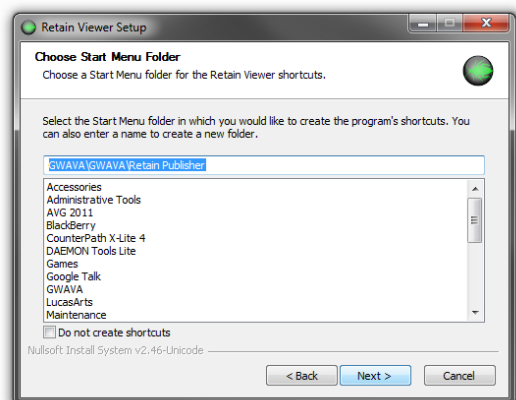
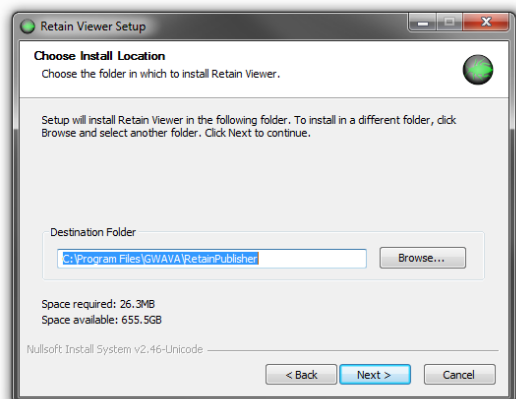
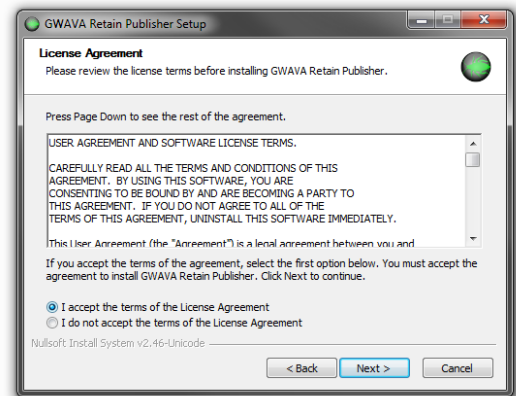
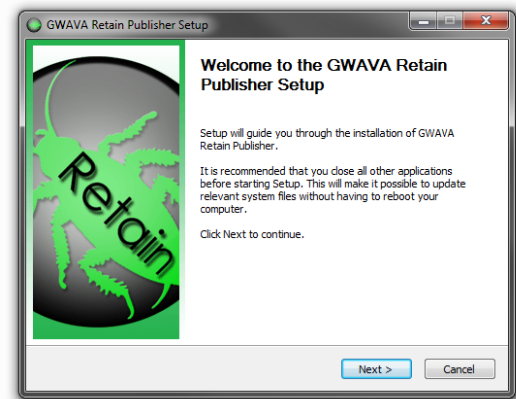
Read the license agreement and accept.

Click 'Next' to continue

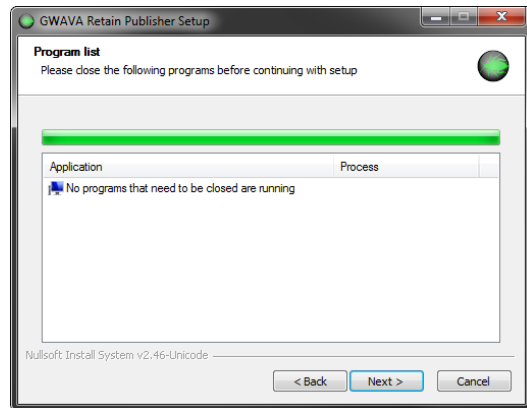
Select the install location. The default is shown, but if the default does not work for your system, browse to, or specify the new path and click 'Next' to continue.

Decide where to place the start menu shortcuts, and whether you wish shortcuts to be created. If you wish to not have shortcuts created, select the 'Do not create shortcuts' option.

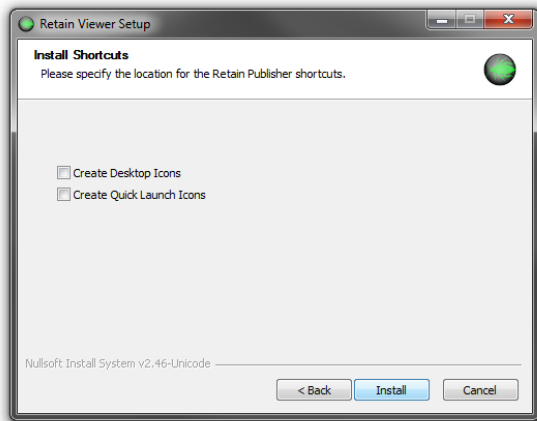
Click 'Next' to continue.



The installer checks all running programs for any possible conflicts and alerts if any programs need to be closed. Click 'Next' to continue.

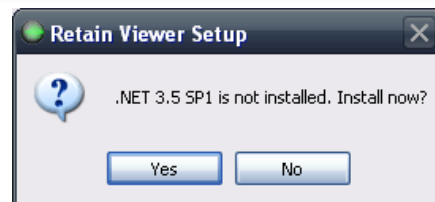


The installer then asks whether you wish to have a Desktop shortcut created, and whether to add Quick Launch icons.

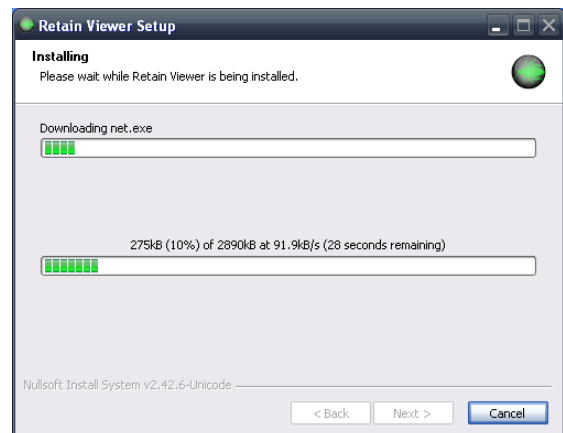


Select the desired settings and select 'Install'. If .NET is present on the system, the install will proceed and you may finish and complete the installation.

At this point, the install wizard checks for .NET 3.5 SP1. If it is not installed, or it is an older version of Windows, the Publisher and Viewer installers will prompt you to install .NET 3.5 SP1. An internet connection is required for this installation. If you decline to install .NET 3.5, the install will fail and exit. The install may require a system restart.

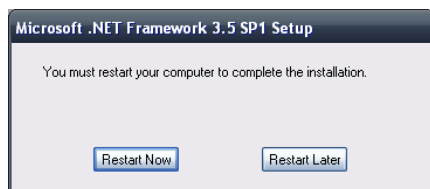


If you select to install .NET 3.5 SP 1, the correct install package will be downloaded from the internet.



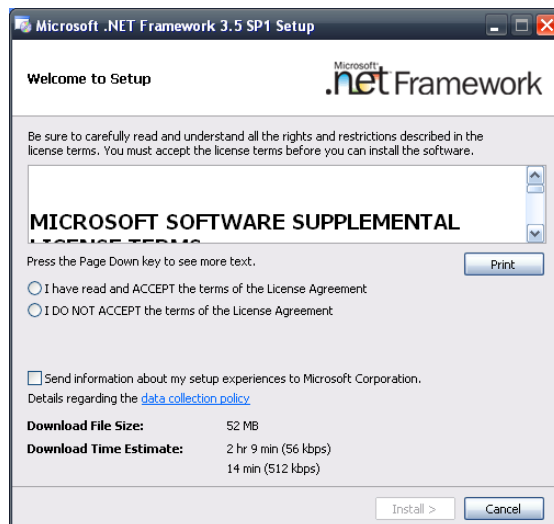
After the package is downloaded, the .NET installer will run.

Read and accept the license agreement and follow the install to the end.

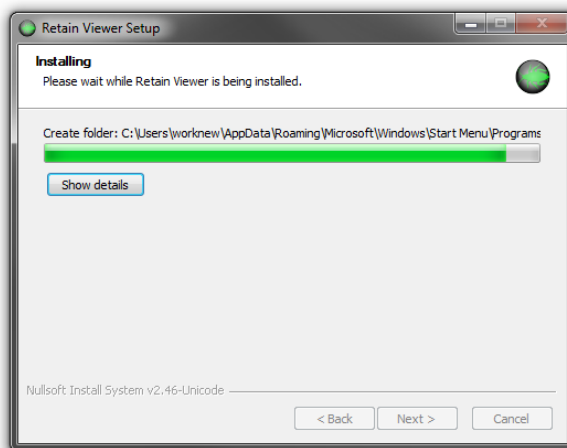


To complete the install, you must restart your system.

Once the system has been restarted to complete the .NET 3.5 SP1 install, the Retain Viewer or Publisher installation must be restarted.

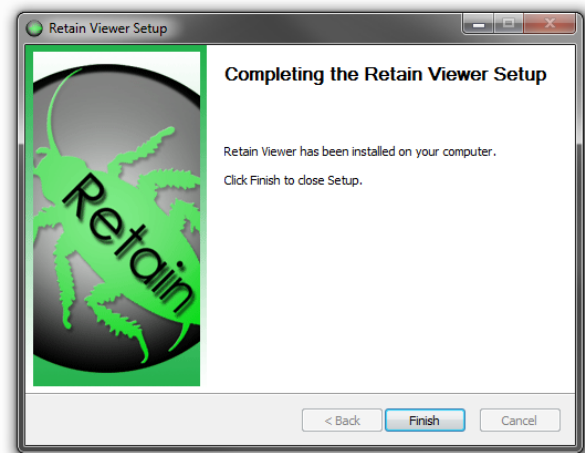


If you previously ran the installer, but had to abort to install .NET, you will need to re-enter your settings.





After the installation has finished, select 'Finish' to complete the setup.



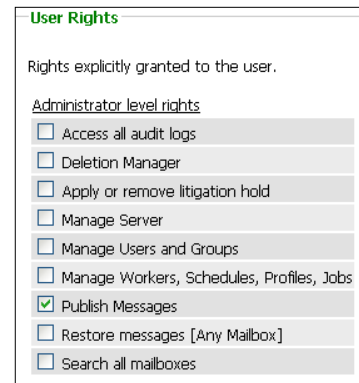
## Retain Publisher

The Retain Publisher must be run to create the local archive for the Viewer to connect to. The Publisher does not display messages, it just accesses and exports messages into a portable message archive.

The Publisher must be used in conjunction with a user that has administrator rights to publish messages. Because the Publisher connects over the network, it requires an open network connection to the Retain Server.

The Administrator account for Retain automatically has the publish messages right, and can be used here, though it is highly recommended to create and use an auditor account with the mail export right and access to the desired mailboxes or post offices required.

Input the Retain Server's DNS or IP Address and the login for the account with message export rights and rights to the desired mailboxes. Unless the login account has the administrator level right to 'search all mailboxes', only the mailboxes granted to the auditor account will be accessible. Granting rights to mailboxes other than the active user's own mailbox are specified in the user rights section, under the 'mailboxes' tab. (The advanced view provides a protocol and port options.)



**User Rights**

Rights explicitly granted to the user.

Administrator level rights

<input type="checkbox"/>	Access all audit logs
<input type="checkbox"/>	Deletion Manager
<input type="checkbox"/>	Apply or remove litigation hold
<input type="checkbox"/>	Manage Server
<input type="checkbox"/>	Manage Users and Groups
<input type="checkbox"/>	Manage Workers, Schedules, Profiles, Jobs
<input checked="" type="checkbox"/>	Publish Messages
<input type="checkbox"/>	Restore messages [Any Mailbox]
<input type="checkbox"/>	Search all mailboxes



Core Settings | **User Rights** | Mailboxes | Miscellaneous

**Mailboxes**

These are additional mailboxes beyond the primary mailbox that the user may access. A non-admin user will only view messages addressed to these e-mail addresses (and to their primary mailbox), and might be able to forward/delete messages if given rights. An admin with *Search All Mailboxes* rights can access all mailboxes and perform any operation in the Search Interface.

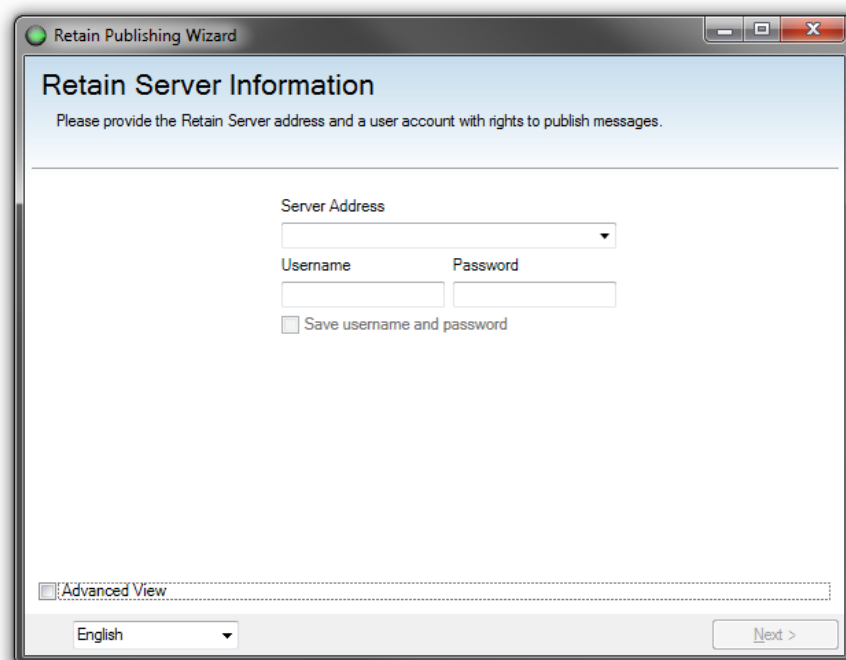
**Currently Selected**

- ✗ Bastula
- ✗ maston

**Criteria**

First Name  begins with

Show only users ☒ Show only recently cached items ☒



**Retain Publishing Wizard**

**Retain Server Information**

Please provide the Retain Server address and a user account with rights to publish messages.

Server Address

Username  Password

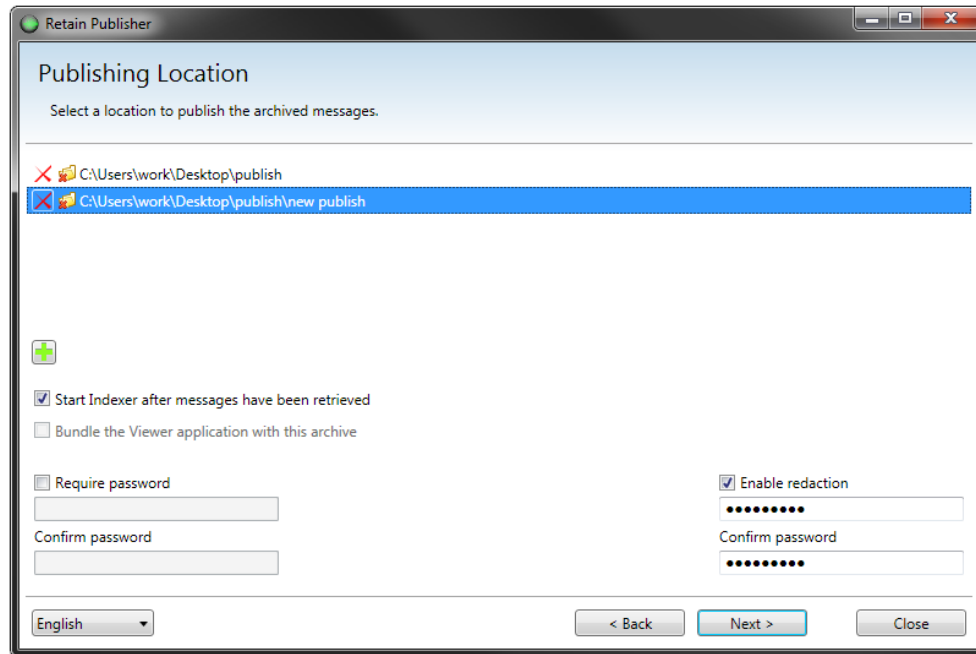
☐ Save username and password

☐ Advanced View

English

Select 'Next' to login to the Retain Server.

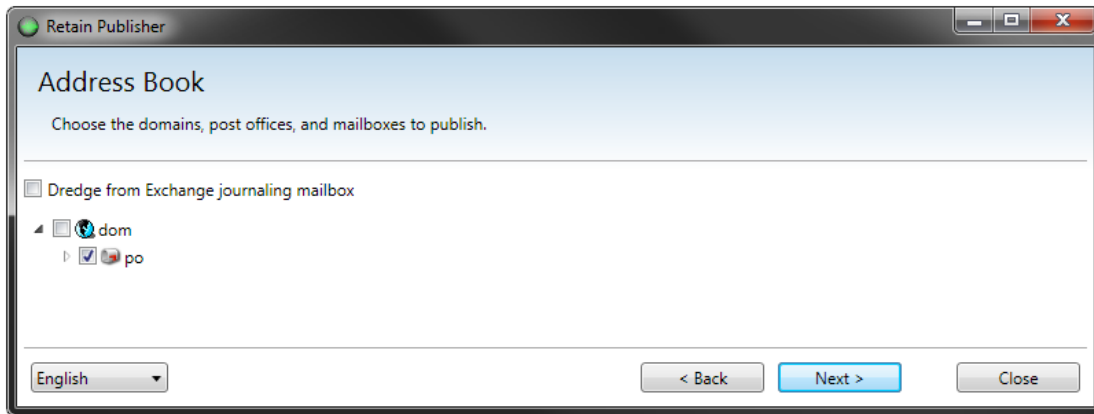
The Publisher then asks for the desired location for the exported archive messages. The messages extracted from the Retain Server will be saved in a database at this location. Select an existing location or select the green plus button and then browse to, or create a new folder for the published archive destination.



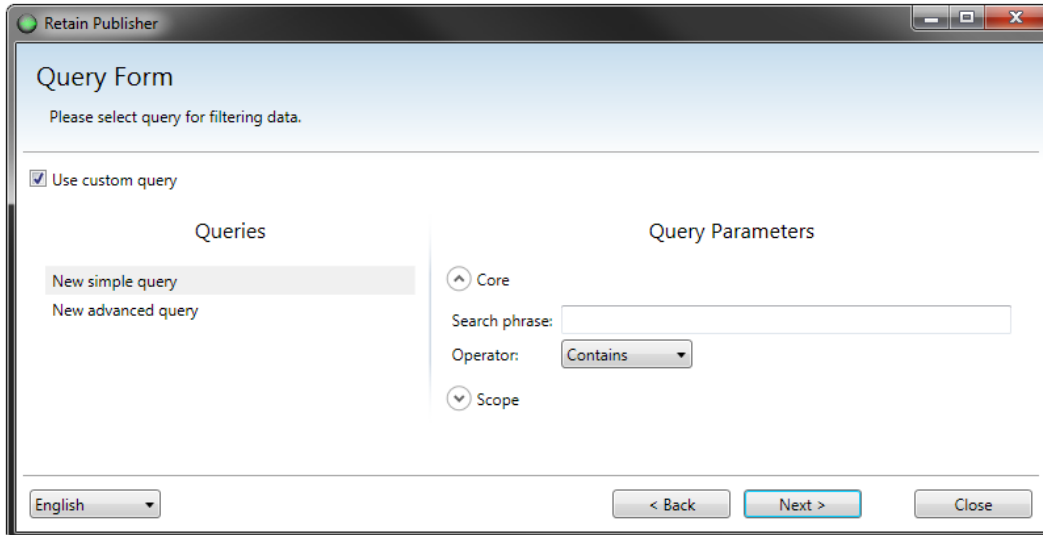
The options to password protect and use Redaction, both require passwords. To use them, select the checkbox and specify a password. The passwords can be different and both options may be present on the same archive.

When the 'Bundle the Viewer application with this archive' option is selected, the Viewer installation file is copied into the archive as well, preparing it to be completely mobile; the entire destination folder can then be copied or sent to any system with all that is required to read and search the archive. If the archive is to be distributed on a burned DVD or CD, further redaction will not function from the disk. All redaction comments should either be made before the archive is burned to a disk, or the archive should be copied from the disk to a local location where changes can be saved. When writing the archive to a read-only medium, it is always prudent to finalize the compilation.

Making the archive mobile can be very useful in situations where direct access to the Retain archive, such as during legal discovery, when email information is required to be surrendered for a user or group of users, an archive can be created and provided without disrupting current Retain operation. Click 'Next' to continue.



Select the scope of the export job. Single or multiple users, mail boxes, message servers, domains, and social media, even crossing message systems, may be added or excluded from any export job. Select 'Next' to continue.



The Publisher may restrict what mail or items are published into the message archive by specifying search or query terms. If a message or item does not apply to the search terms, it will not be added to the published archive. There are three opportunities to specify search terms or criteria; Core (query), Scope, and Misc.

Each of the three different criteria areas at this step may be shown or hidden by clicking on the hide/show arrow. Select the 'Use custom query' and either the simple or advanced query options to enter search criteria. Previously saved searches or searches that have been shared with the logged-in user will be displayed in the queries menu. If the 'Use custom query' box is not checked the query parameters will remain locked and cannot be manipulated.

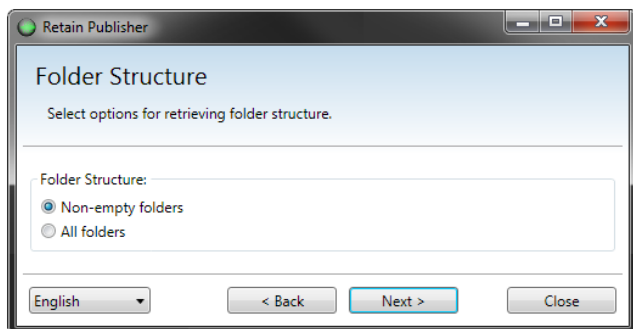
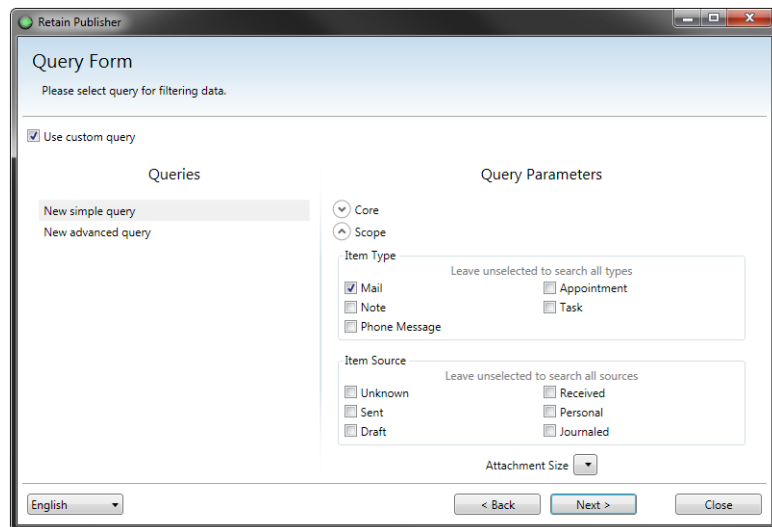
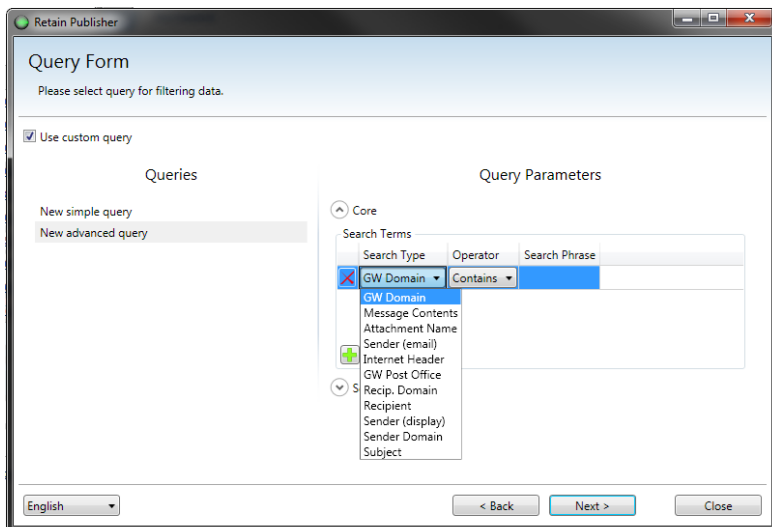
To add criteria to the Core query parameters, simply select the green '+' icon, then select the different desired operator, search type, and phrase.

For instance, a very exclusive 'contains' search of the message contents will only publish messages that have the exact specified word or phrase in them. Fuzzy searches for approximates to the specified phrase, producing results including the words, but not in the specific order, or similar words.

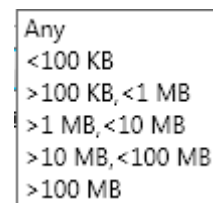
The Scope details what types of messages will be searched for. If no items are checked, all are allowed, and that setting is default. To restrict to specific messages and types, (some are mail system specific), at least one item must be selected. If one item is selected, or something is desired to be excluded from the published archive, select all desired item types. The Item Type, Item Source, and Attachment size, are all independent factors and must be specified independently or left blank. A blank item source and attachment size will not restrict those criteria when combined with a specified type.

Attachment sizes can be restricted or allowed into the message archive, and are accessible through the drop-down menu at the bottom of the query screen, under the 'Attachment Size' menu.

Simply selecting the desired setting will make it active in the search criteria. Set as desired and continue.



The publisher can also be restricted to exclude all empty folders from the published archive. Select as desired and click 'next'



The Date Range allows for specific item date ranges to be selected or excluded. The query will cause the publisher to only look for the specific mail required within the specified time frame.

The time range may have a start date, and end date, or both.

This setting differs from the following time restriction in that the start and end times may be specified in a range, instead of a specific hard date. Only messages strictly adhering to the range will be published. If a date range is desired, enable the date range and select the desired range.

A date range is required to be specified if the active query is anything other than a previously saved

query, so make sure it is set to an acceptable window for the desired data. The publisher automatically defaults the date range to one year.

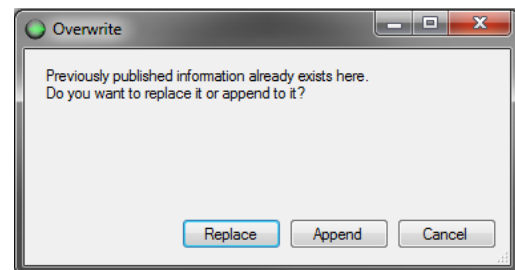
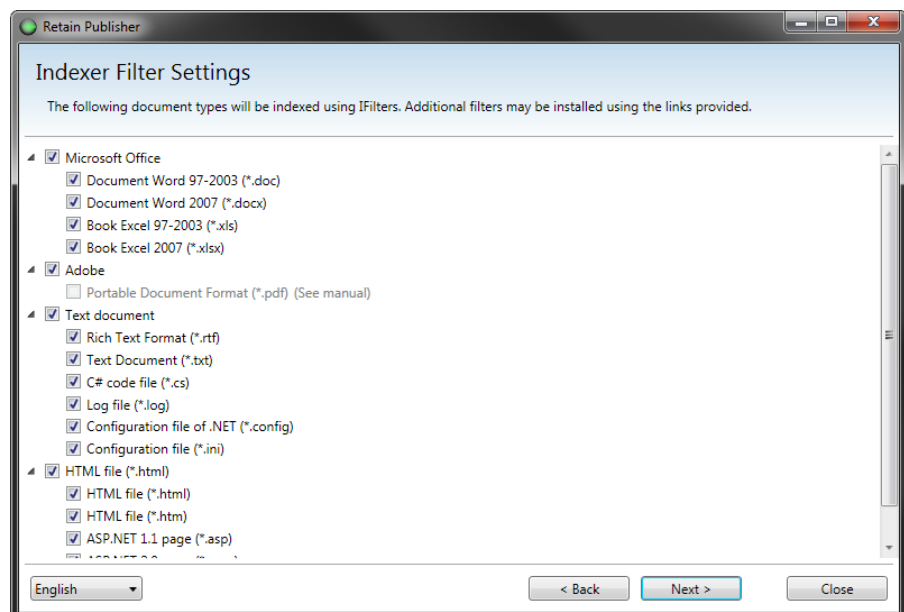
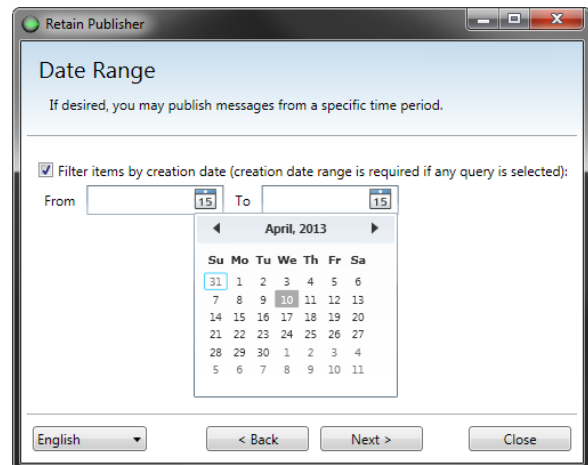
Click on the 'From' or 'To' dates to reveal the data selection calendar and specify the date as desired.

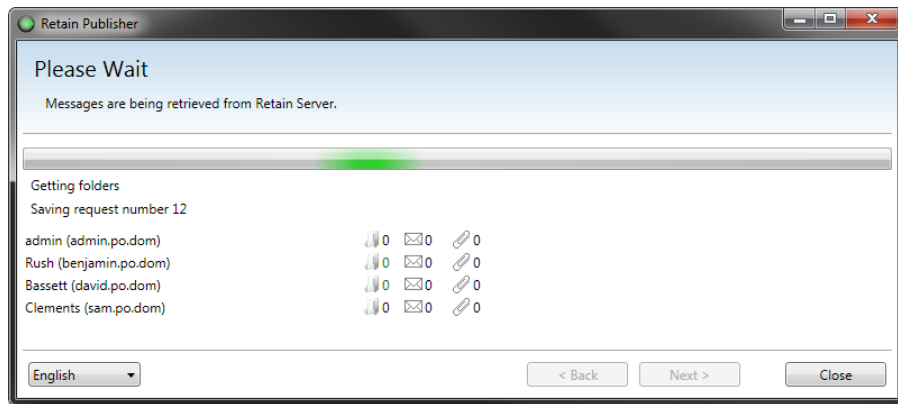
Click 'Next' to continue.

The Publisher can create and index the archive for faster searching and browsing by the Viewer. It is highly recommended to index a published archive. All default filters are shown. Click 'Next' to continue.

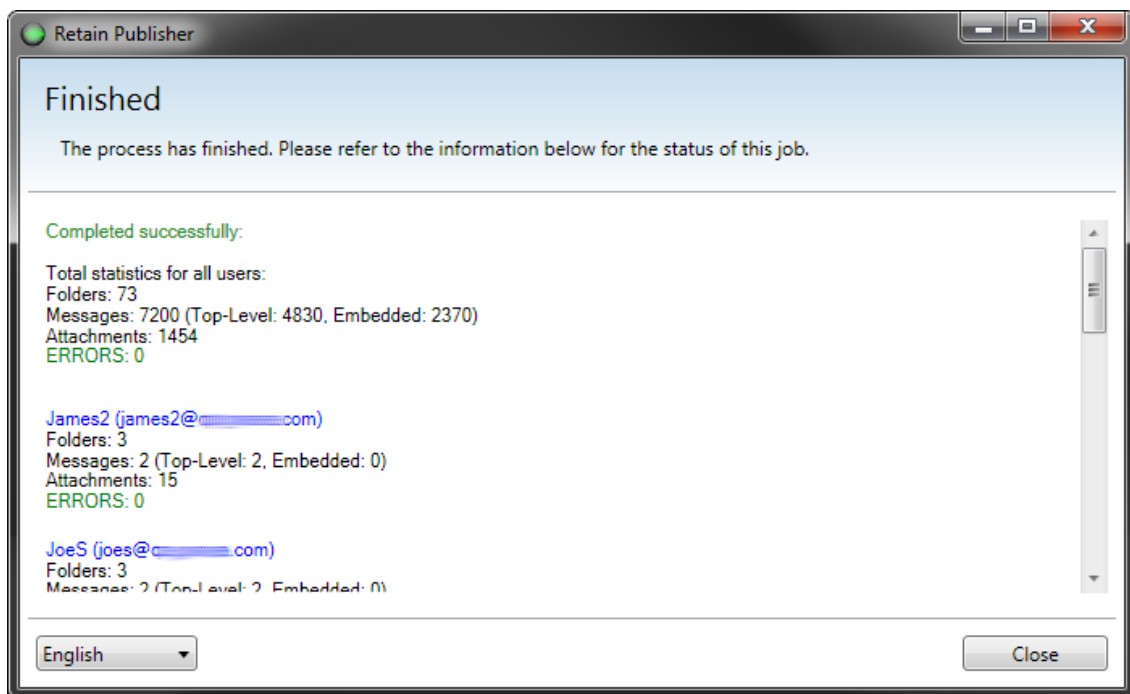
If previously published messages are present in the selected publish location then you will be presented the option to overwrite the present information, or to append the new messages to the existing message store.

The Publisher will connect to the Retain Server and export the qualifying messages from the selected user(s) mailboxes and builds the local archive.





When the Publisher is done, it will display a report on the job. Depending on whether the exported archive was selected to be indexed after the job is done, the indexer will run. A .net error may occur at the end of Indexing, caused by an error in Adobe iFilter, if this error occurs, please install Adobe PDF iFilter 5.0 found on Adobe's web site.



Select 'Close' to exit the publishing wizard and the indexer will automatically run if that option was selected. With a successful publishing job, the archive is now ready to be connected to the Viewer.

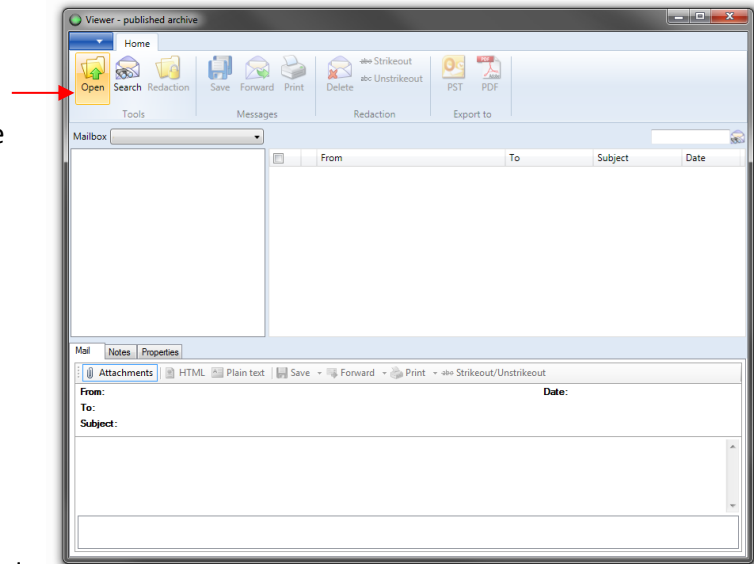
If the Indexer was not automatically run, it must be run before the Viewer can search the archive.

## Retain Viewer

To connect to the published archive, locate the shortcut to the installed Retain Viewer and start the Viewer.

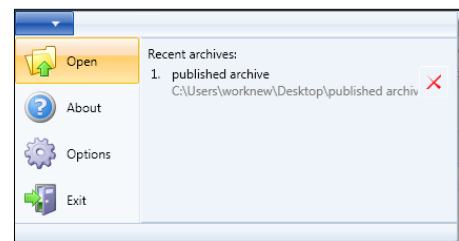


The viewer must be pointed to a valid database on initial startup. If the viewer does not prompt for the location to a published database, or if a new database is desired, select the 'Open' button and browse to and select the containing folder. If the Viewer has been previously opened, it will remember the last database opened.



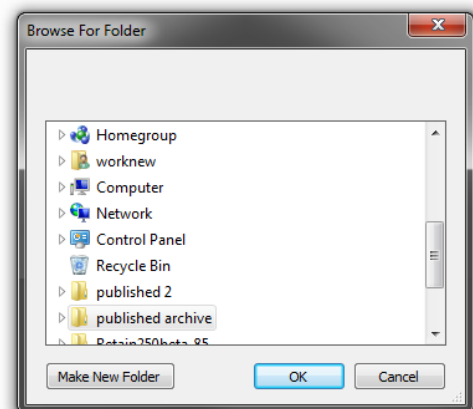
The viewer is setup similar to an email client, with the mailbox and account on the left, the selected account's contents fill the space on the top right, and any selected message's contents are displayed along the bottom. Tabs allow access to the message properties or text, and highlighted buttons below the tabs determine what is shown and how, (Attachments, HTML, Plain Text). The Viewer also has the ability to forward the selected message out of the portable archive to any specified address.

To access an archive, select the 'open' button from the top toolbar, or select the 'Open' option from the 'File' dropdown menu.



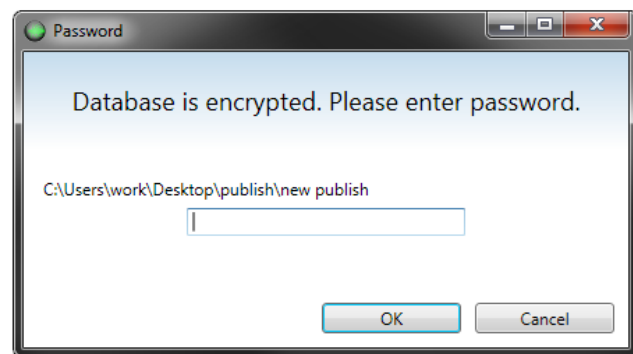
The Viewer only needs to know the base location of the archive, or the folder selected in the Publisher as the archive location. The 'Open' menu starts a browse window.

Browse to the location where the portable archive is located, select it, and click 'OK'.

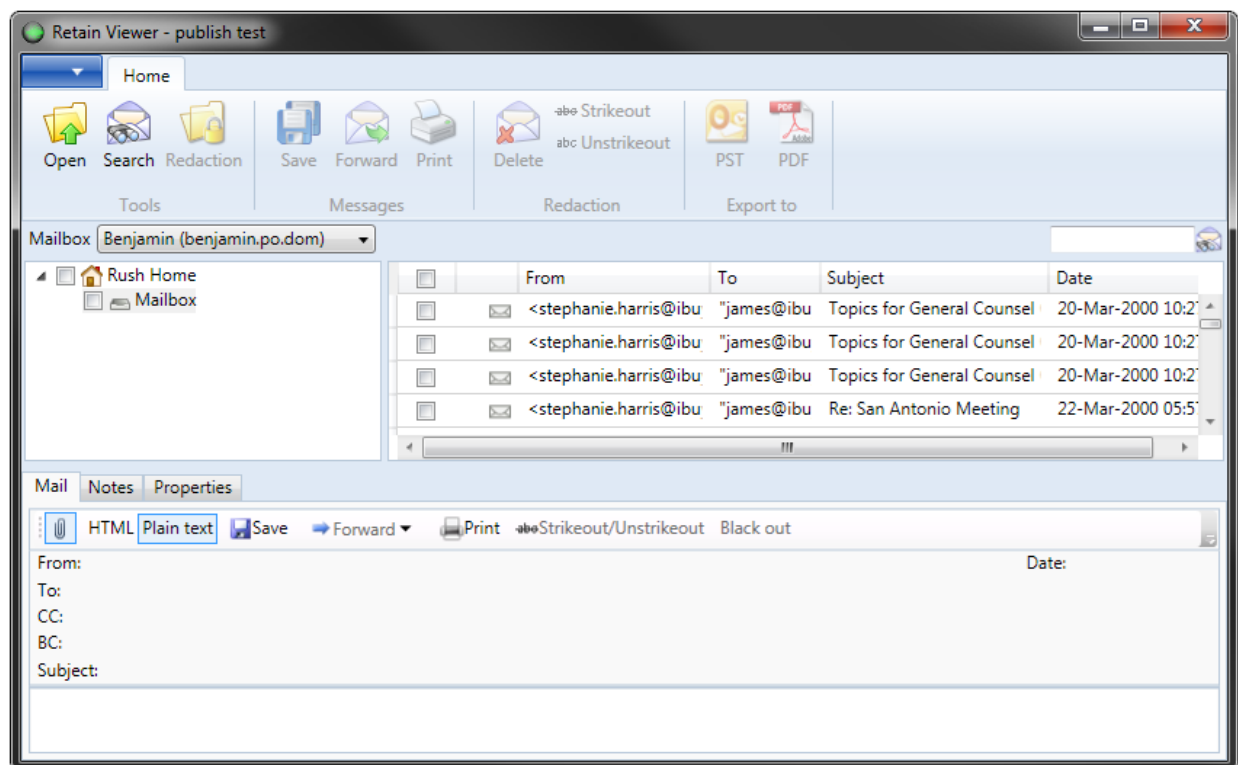




If the archive was password protected, the correct password must be entered here before the Viewer can gain access.

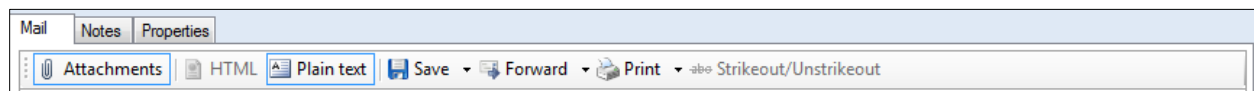


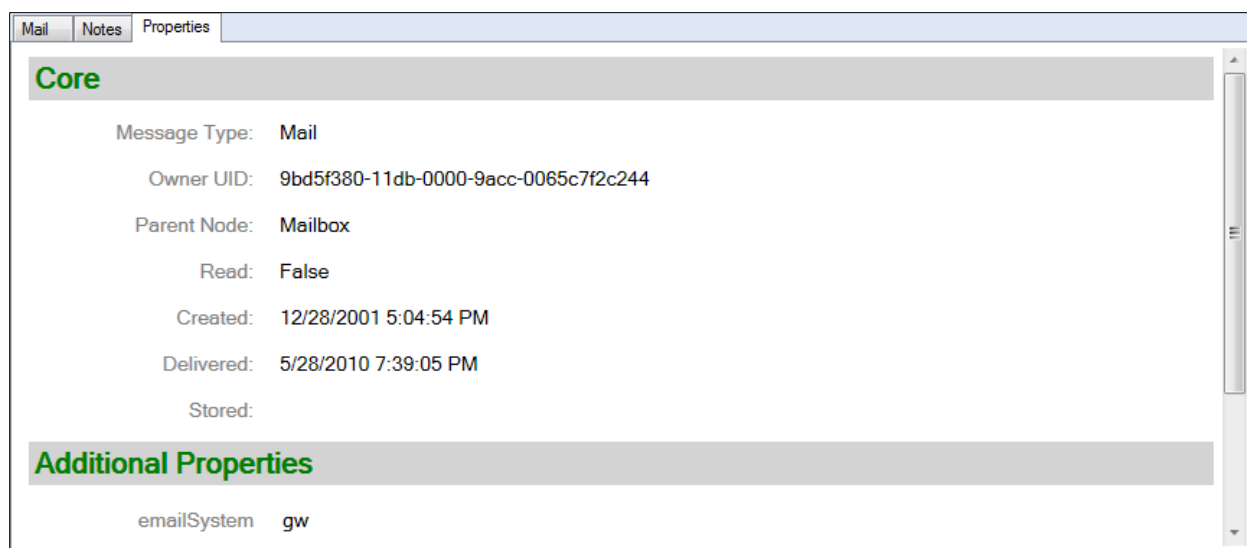
Once the Archive has opened, all mailboxes contained in the archive are displayed. Select a mailbox to access the mail in the archive.



It is important to note that while the Publisher stores time in UTC, the time displayed in the viewer, located in the 'Date' column for each message, is relative to the viewer's installed time zone, it is not in UTC. Messages published in PDF also display according local time zone. PST is exported in UTC, but Outlook rounds to the nearest minute, and displays the UTC timestamp in local time.

The text of the selected message will be displayed in the bottom viewer pane. The viewer contains options to show or hide the attachments, forward the message, as well as whether to view the message in plain text, or in HTML when available.

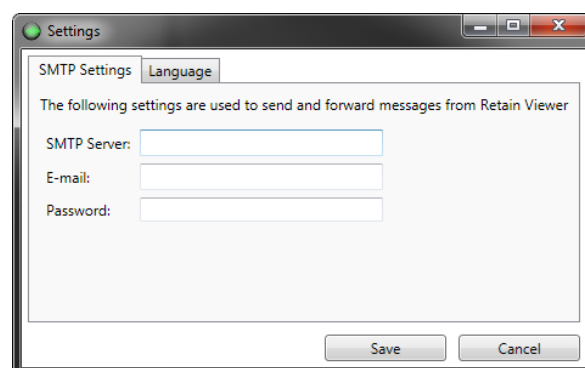
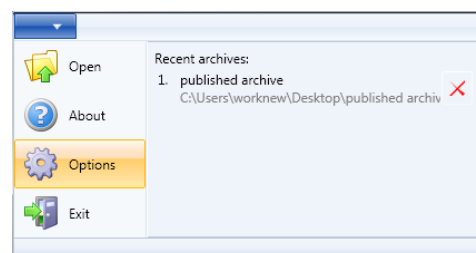




The properties tab displays the essential information on the mail item in question. The created, delivered, read status, and store date are displayed along with the identification number, message source, etc.

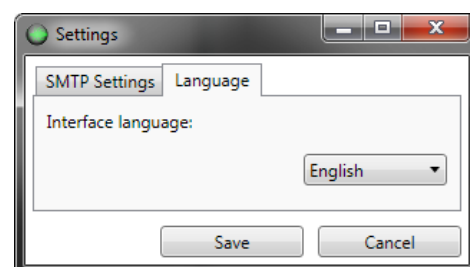
## Forward

The Forward, and forward as attachment options allow the Retain Viewer to send the selected message from the archive to a destination account. 'Forward' functions exactly as the forward function in an email client. The 'Forward as attachment' creates an attachment from the selected email and attaches it to a message sent. Forwarding can be accomplished in three ways: Selected single mail and the 'Forward' button from the top toolbar, selected single mail and 'Forward' or 'Forward as attachment' from the quick view pane, or selecting multiple messages and then selecting the 'Forward' button from the top toolbar. (Forward as attachment is only available for a single message.)



In order to utilize the 'Forward' option in the viewer pane, the Viewer must be configured with a mail server. To tell the Viewer which SMTP server and account to use to send messages, select 'Options' from the drop-down menu.

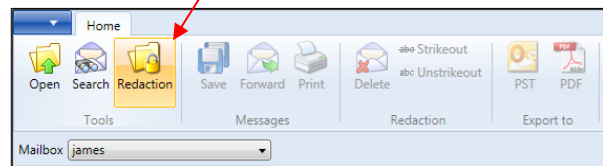
The 'Settings' configuration menu will appear. Enter the DNS or address of the SMTP Server desired to use for the Viewer system, and an appropriate account, (Username is required, password is optional), to connect and send messages.



Language and displayed document format settings may be changed as well for the specific viewer.

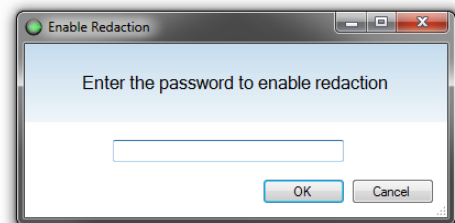
## Redaction

Redaction allows the viewing auditor to compile notes on the archive. The notes are appended to the entire archive, and not any individual messages, which makes Redaction extremely useful to compile messages and identify messages of interest.

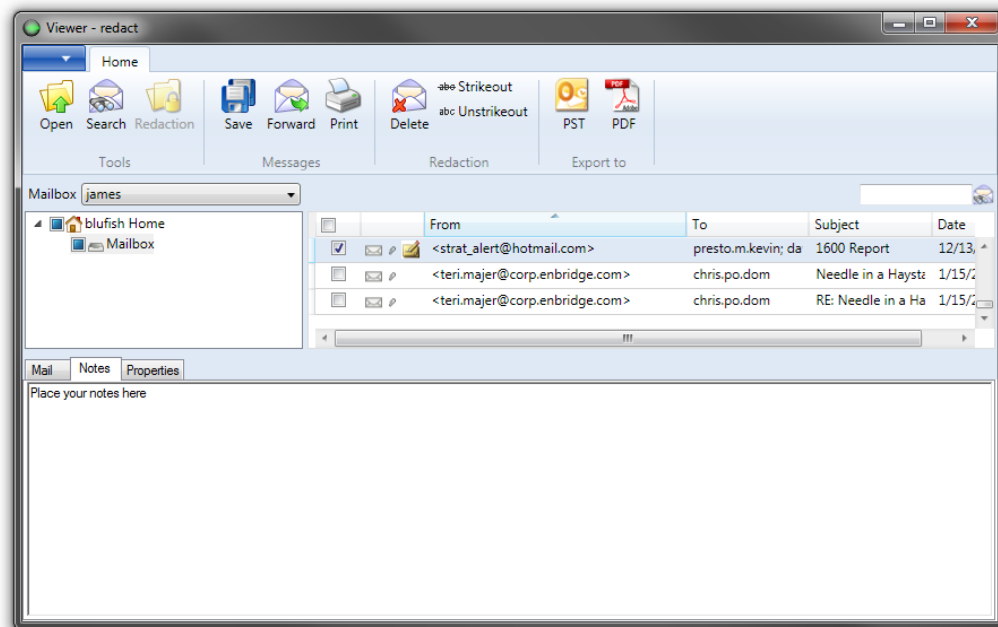


To enable redaction, the archive must first be exported with the redaction option enabled in the publisher, (if the archive was not published with Redaction enabled, the option will appear grayed out), and a redaction password must be entered.

On a redaction-enabled archive, to access the feature, it must be 'enabled' in the viewer. This option is found on the toolbar. Select 'Redaction' and enter the redaction password.



When Redaction is enabled, the 'Strikeout/Unstrikeout', 'Black out' options, and 'Notes' tab become active. The Notes tab works much like a notepad that is always connected to the archive. Items of interest or whole messages' texts can be copied and compiled in the redaction notes. Messages with notes on them are marked in the archive viewer with a notepad icon in the message list.

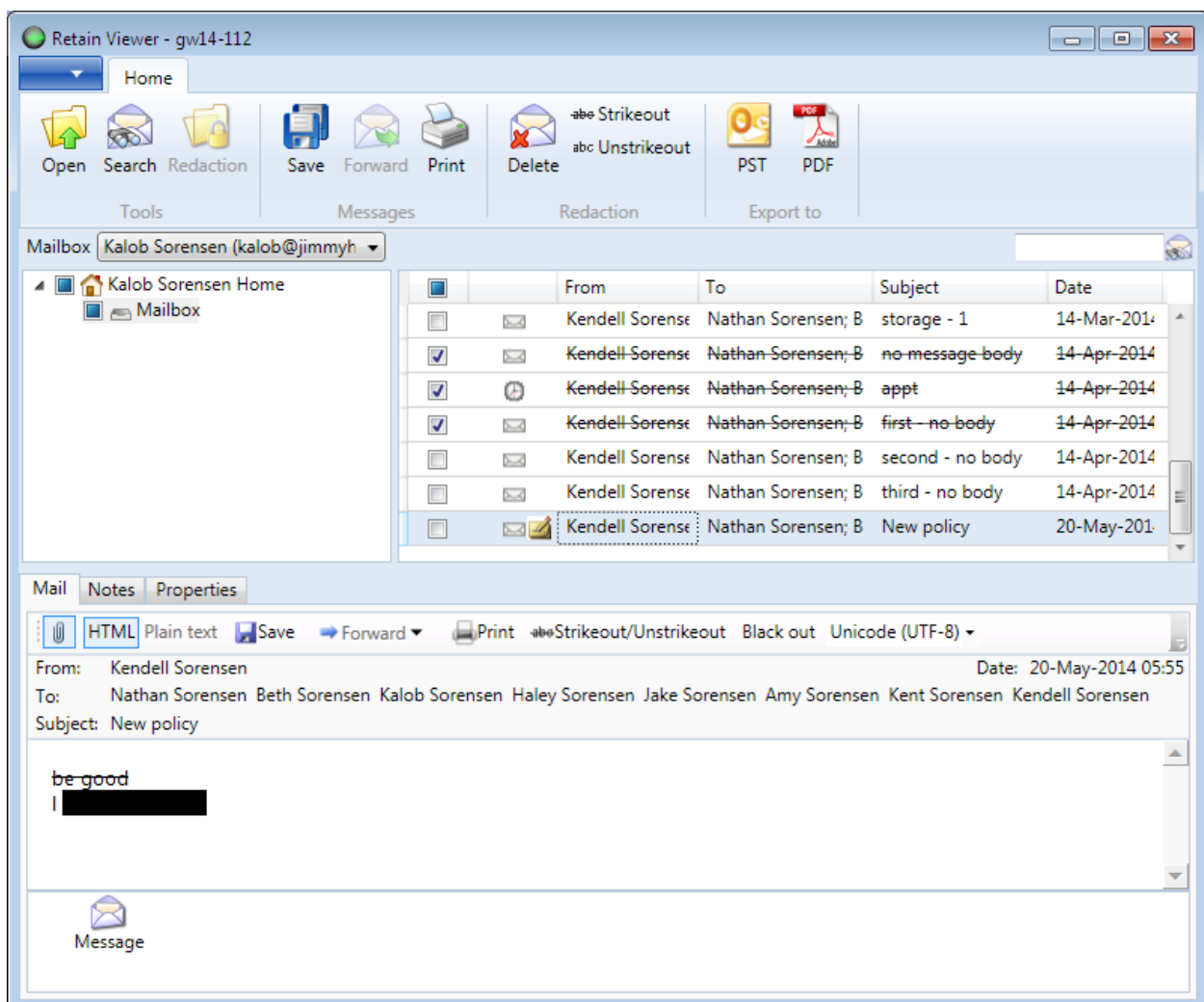


Redaction notes are connected to the entire archive and are not tied to any specific selected message; they stay the same across all messages to be accessible regardless which message is selected.

### ***Strikeout/Unstrikeout and Blackout***

The Strikeout option enables a review of the archive before handing it over to legal scrutiny. This allows the user to denote items and messages which do not apply, or are unnecessary for the published goal. For example, if an investigation is being performed on specific activity, or internally on the account and all correspondence with a customer, the strikeout will allow messages or even sections of messages which do not apply, to be marked out.

To use the Strikeout, first Redaction must be enabled. After redaction is enabled, the options become active. To Strikeout or Unstrikeout messages in the message list, select the messages by placing a check in the checkbox and then select the 'Strikeout', or 'Unstrikeout' button from the top bar. To strikeout sections in the body of the message, highlight the desired section and select the 'Strikeout/Unstrikeout' button from the view message bar.



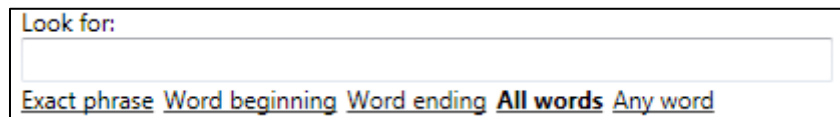
The Blackout option allows a reviewer to remove sensitive information, such as social security numbers, from published messages. To use the Blackout option, highlight the desired text and select the 'Blackout' button. Blackout cannot be removed from text.

## Searching the Archive

The Retain Viewer provides full search functionality. The search function is accessed through either the shortcut 'Ctrl+F' or by selecting 'Search' from the toolbar.



The different options for the search are shown with the criteria input below the options. Any text string or value can be searched for in the full text of the mail, or simply in the subject line. The search options are listed below the search term entry bar.

A screenshot of the search criteria input bar. It has a text entry field labeled 'Look for:' and a row of search options: 'Exact phrase', 'Word beginning', 'Word ending', 'All words', and 'Any word'. The 'All words' option is highlighted.

**Exact phrase:** The exact phrase specified must exist in message.

**Word beginning:** A word in message must start with the exact characters specified in the specified order.

**Word ending:** A word in message must end with the exact characters specified in the specified order.

**All words:** All words specified must exist in the message or item. (This is default)

**Any word:** At least one of the words specified must exist in the message or item.

To see how this works, consider the following example. Three message sentences are provided:

1. Turn right ahead.
2. Turn right after the stoplight.
3. After the third stop sign, turn.

Terms used: Turn, Right, Stop.

### All words (default search)

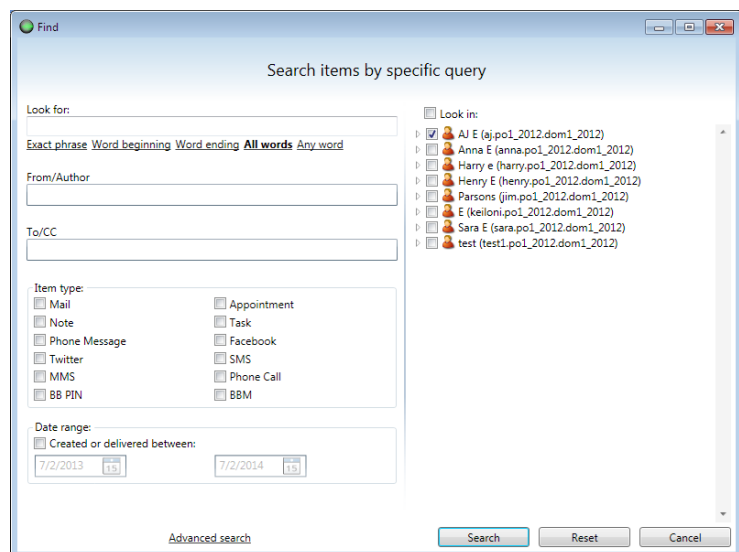
Terms used: turn right stop

Results: Sentence 2. Sentences 1 and 3 do not contain 'Stop' and 'right', and would be excluded.

### Any word

Terms used: turn right stop

Results: All sentences would be returned, as all sentences contain at least one of the words.



### Exact Phrase

Terms used: Turn right

Results: Sentences 1 and 2. If the term 'Turn right stop' were used, no results would be displayed, as the exact phrase, in that exact order is not contained in the sentences.

### Word Beginning

Terms used: st

Results: Sentences 2 and 3. Stop and Stoplight both start with 'st' and would have been returned.

## Word Ending

Terms used: ght

Results: Sentences 1 and 2. 'Right', and 'stoplight' end with 'ght', but no word in sentence 3 qualifies.

Advanced search allows users to specify and limit which areas the search is applied to. Ex. Subject, body, etc. All additional search parameters in the advanced search are treated as 'and' criteria. (For example: exact phrase in the subject, *and*, any words in the subject body.)

The following options are functional for both the search messages option included here, as well as the publisher search criteria. In the search 'look for' line:

- && represents 'and'
- || represents 'or'
- No operators work as an exact match search.

For example:

- Boy girl = exact search for "Boy girl"
- Boy && girl = Boy and girl search
- Boy || Girl = Boy OR girl search
- Boy && girl || dog && cat = Boy and girl OR dog and cat search.

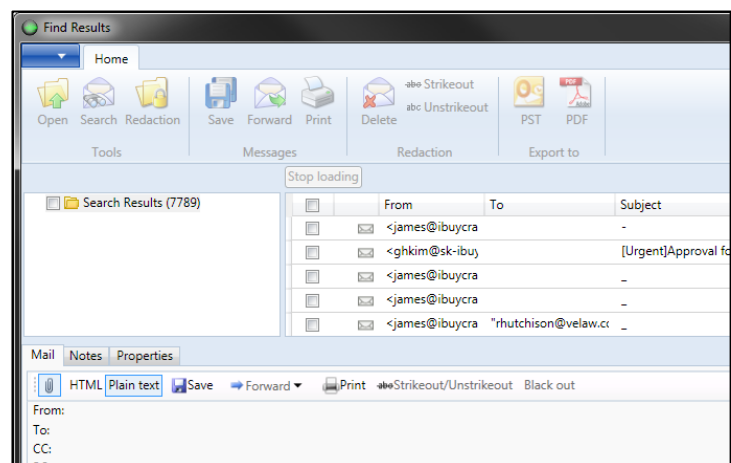
NOTE: These search operators DO NOT work with the search option 'starts with', but can be utilized with all of the other base modes of the search.

NOTE: Lucene search engine does not recognize the following English 'stop words' or articles of speech: a, an, and, are, as, at, be, but, by, for, if, in, into, is, it, no, not, of, on, or, such, that, the, their, then, there, these, they, this, to, was, will, with

These words are not indexed by Lucene, and thus are not taken into account if they appear in the list of words specified for the search. This may result in some unanticipated results in "exact" searches.

In addition to the operators and text, the sending Author or the destination and carbon copy recipients of a message as well as item type and the date range can specify or restrict a search. Selection of the date range is done through an interactive calendar. Be sure to select the desired mailbox or mailboxes to apply the search through. (The depicted example archive only contains one mailbox.) Select 'Search' to begin.

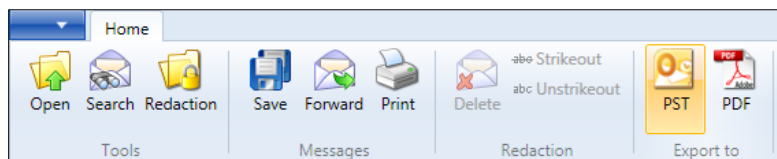
When the search is finished, the results will be displayed in a separate results window, identical to the main viewer interface.



## PDF and PST Export

Retain Viewer can export selected files and messages from a mailbox or archive to a PDF or PST archive file. *NOTE: PST export requires MS Office or Outlook, or the associated plugin. The viewer will prompt for plugin installation if necessary. It is highly recommended to have Outlook installed.*

To migrate to PST, select desired files in the view window then select 'PST' from the toolbar.



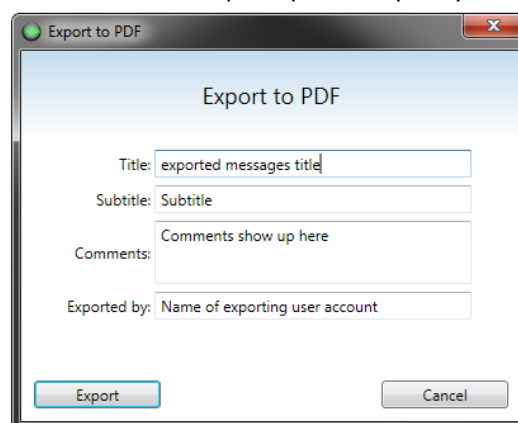
A window confirming the location and file will open. When the 'Save' button is selected the PST file is created and available for use.

The Retain Viewer can also save selected messages as PDF. Select the desired messages and click 'PDF' in the toolbar.



The selected messages are then published in a single PDF. In addition to the standard file name and location, the PDF has title, exported by, and comment sections that the user is prompted to specify before the viewer publishes the PDF.

The finished PDF contains all the information displayed in the viewer, as well as an option to save individual text or message sources.



The published PDF displays the separate emails along the top in a list and displays the message information in a lower pane, as shown below.

