

GWAVA Inc.

Retain

Retain Outlook Plugin

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Overview

The Outlook Plugin integrated the Retain storage directly into the Outlook client. Users will have a new tab and ribbon added to the Outlook client offering connection to their Retain storage. Messages may be retrieved and added to the user's local machine and administered through the Outlook client.

Message data may be searched in both the Retain storage, and the locally restored messages. The client will not modify Retain administration nor will anything done through the Outlook Plugin modify the Retain Server or the Retain Storage. The Outlook Plugin is provided for both individual and distribution installations.

Supported Software

Outlook 2010, 2013 32-Bit and 64-Bit

NOTE: Whether the 64-Bit or 32-Bit version should be used is determined by the bit version of Outlook installed, not the version of the OS. To check the version of Outlook being used;

2010: The information on the system is located under **File | Help | About Microsoft Office**

2013: The information on the system is located under **File | Office Account | About Outlook.**

System Requirements

Visual Studio Tools for Office v. 4

.Net 4 or higher

NOTE: The .EXE installer bundles the prerequisites and can be used to install both prerequisites and the plugin at the same time.

Installation

Installation of the Retain Outlook Plugin is straight forward. If unsure that prerequisites have been satisfied and installing on individual workstations, use the .EXE bundled installer.

If deploying from a distribution server, utilize the .MSI installer package. In addition, silent install commands are provided. A full list of silent install commands can be found in the appendix. Make sure to utilize the correct version of the installer to match the version of Outlook: 32-Bit or 64-Bit.

Begin the installation, accept the license agreement, and click 'Next'.

Select whether the installation will be system wide or restricted.

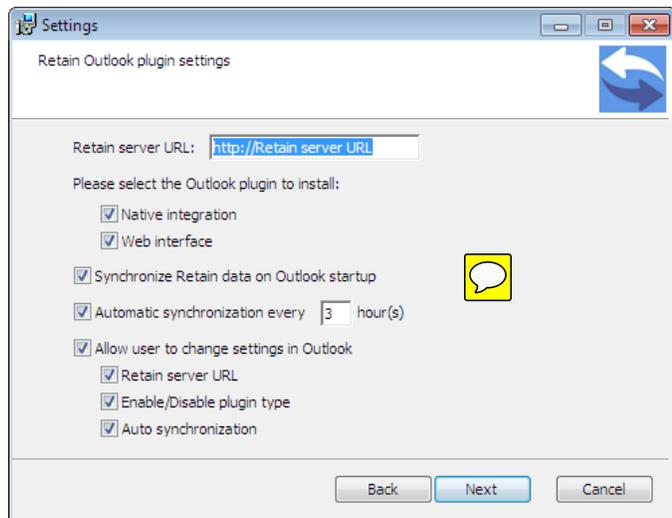
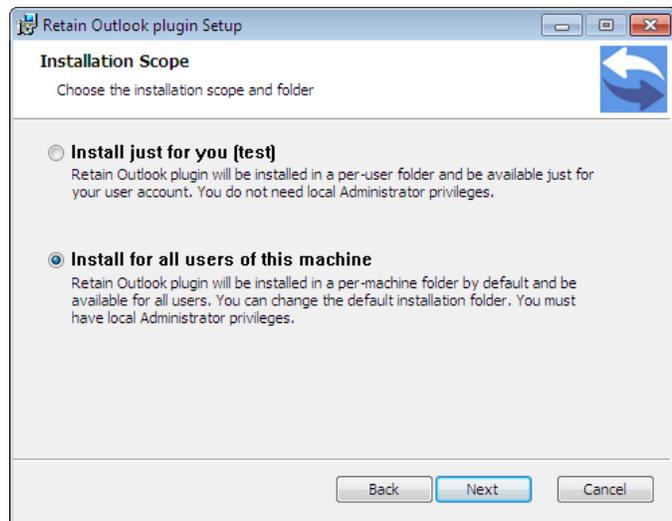
The Retain Outlook Plugin may be customized during installation, to only allow certain functions once installed.

Retain server URL: this is the connection address for the Retain Server. Do not put the '/RetainServer/' suffix on the end of the URL. Use the following syntax:

http(s)://(Retain Server URL)

Select Outlook Plugin: There are two options for the plugin. The Web **Interface** is the first plugin version, which links to the Retain Server Web **Interface**. The **Native** Integration places the Retain tab and ribbon in the Outlook Plugin and the rest of the options apply to the **Native** integration.

Synchronize on startup: **Synchronization** with the Retain Server tells the plugin to match the local data with what is in the Retain Server. The plugin may be configured to **synchronize** at start, or on an automatic time period. Auto **synchronization** is determined in hours.



Allow users to change settings: If checked, the following selected options are available to be changed by the user in the plugin. If this option is not checked, the options will be grayed-out in the settings section of the plugin, and cannot be modified.

Configure as desired and select 'Next'.

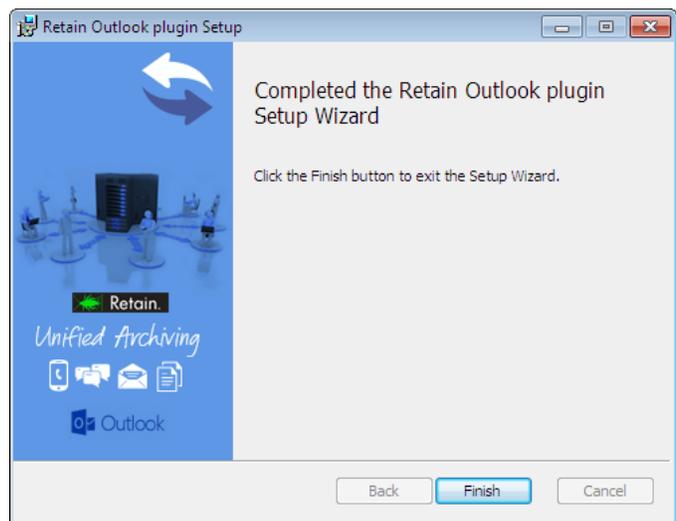
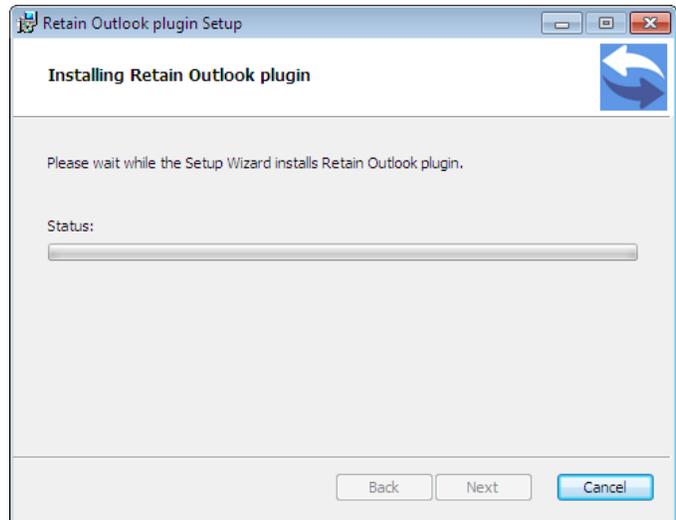
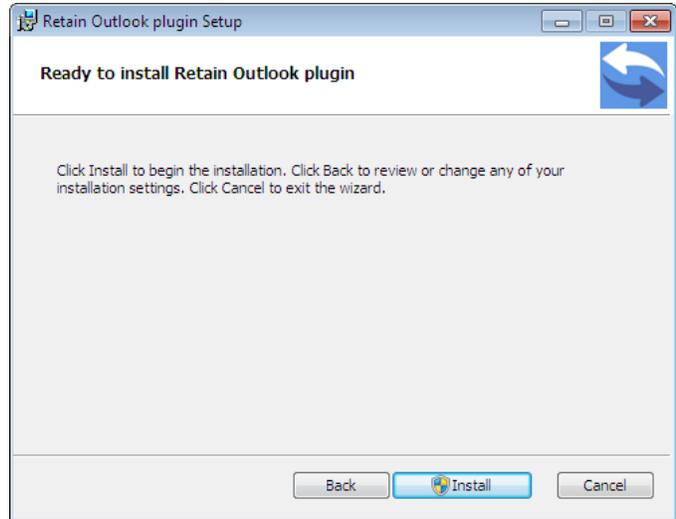
If any settings need to be changed, use the 'back' button and change then.

Select the 'Install' button to begin the plugin installation. (Installation will require admin rights.)

(If using the bundled installer, the installation will check for prerequisites and install them if they are missing.)

Wait for the plugin to install.

Once the install has completed, select 'Finish' to exit the installer.



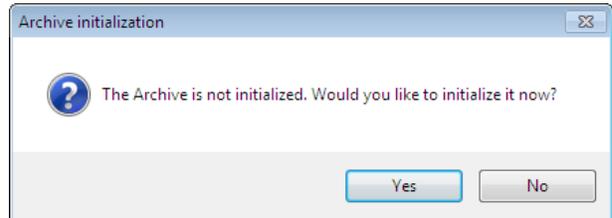
Features and Use

To access the Retain Outlook plugin, open the Outlook client.

In the Outlook client, a new Retain tab is available. The Retain tab provides access to the plugin and Retain archive settings and features.

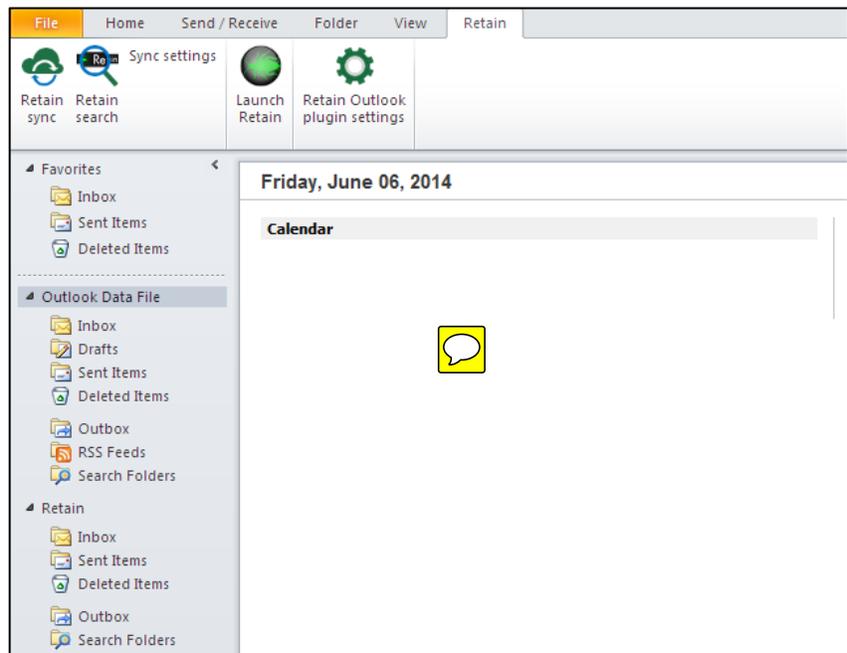
Users now can search their Retain archive, import messages from Retain to their local system, and manipulate those local messages with the Outlook plugin.

The first time that the plugin is initialized you, it will ask to initialize the archive. Initializing the archive creates a new folder tree in the tree navigation pane on the left. The folders here are the default folder set for Outlook. Any new folders created after **synchronization**, are there as they exist in the Retain Archive that was **synced**.



Once installed and initialized, the Retain tab, ribbon, and folder structure are available.

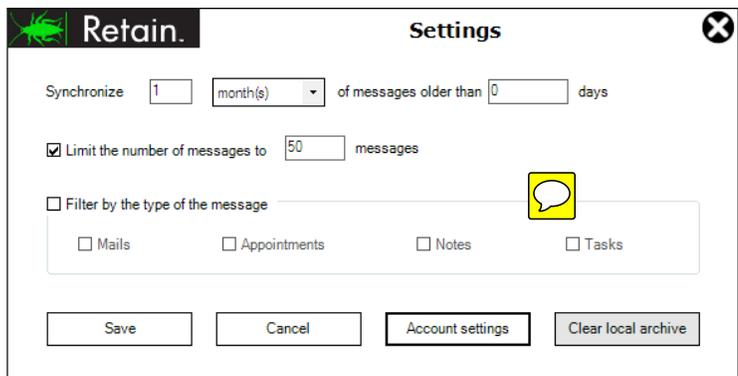
To access the folder structure, simply select it as you would the normal folder structure in Outlook.



Sync Settings

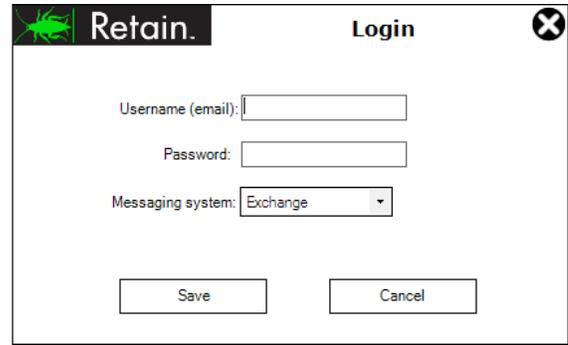
The **Sync** Settings is the criteria which dictates what message data will be added into the local storage and made available in the Outlook client.

What data is added to local storage can be limited by age, number of messages, or item type. 'Save' saves your settings. However, before the **sync** can be performed, the login information must be provided. Select the 'Account Settings' button.



Account Settings

The account settings is simply the login credentials of the account which is to be used for the sync. Input the email and password, and specify the message system to be used. GroupWise usernames must not be the full address. If inputting an Exchange username, enter the entire email address. Save settings.



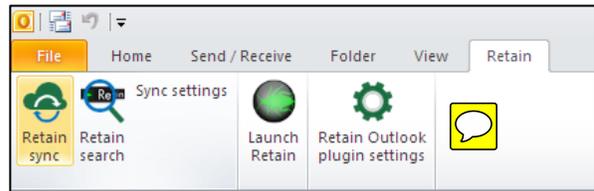
The image shows a dialog box titled "Retain. Login". It contains three input fields: "Username (email):", "Password:", and "Messaging system:" with a dropdown menu currently set to "Exchange". At the bottom, there are two buttons: "Save" and "Cancel".

Clear Local Archive

The Clear local archive button does exactly as it sounds, it will empty the local archive, Retain, folder tree of all message data items. Any folders which were part of the Retain archive, and not part of the default folder set of Outlook will also be removed. The default set of folders and the Retain folder tree will still be present. To completely remove the Retain outlook plugin, please uninstall the plugin from the system's Control Panel.

Retain Sync

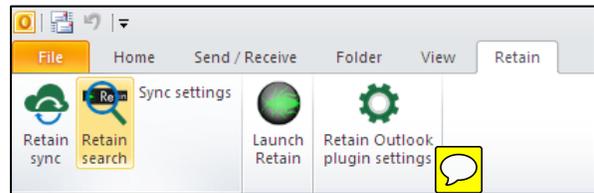
The Retain Sync button initiates a synchronization of the outlook plugin with the Retain archive according to the Sync settings. If the sync settings have not yet been set, the settings and the user credentials must be configured before the sync will complete.



Retain Search

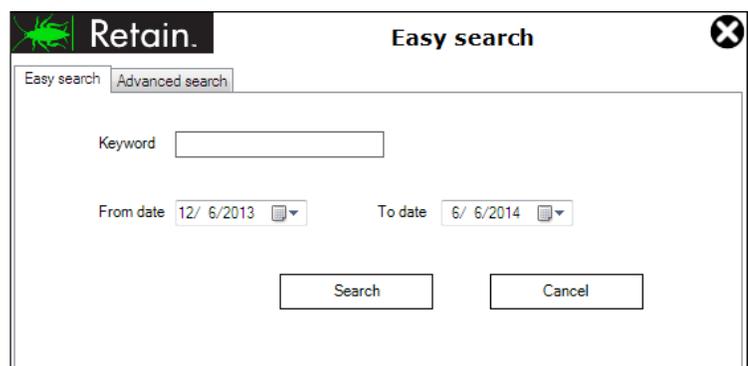
Searching the Retain Archive with the Retain Plugin is simple. Select the 'Retain Search' button from the Retain ribbon.

The search interface has two different screens: Easy and Advanced search.



Easy Search

With the Easy search, the plugin only offers a simple keyword and date range. The search keywords are subject to the same restrictions and abilities as the Retain web interface. In general, if multiple search terms are desired, move to the advanced search option. After search terms and a date range has been applied, select the 'Search' button.



The image shows a dialog box titled "Retain. Easy search". It has two tabs: "Easy search" (selected) and "Advanced search". The "Easy search" tab contains a "Keyword" input field, a "From date" field with a calendar icon (set to 12/6/2013), and a "To date" field with a calendar icon (set to 6/6/2014). At the bottom, there are two buttons: "Search" and "Cancel".

Advanced Search

The advanced search allows for more control in the search process.

The 'Search in' drop-down menu allows for customization of the limiting function of the keyword.

The condition field restricts the condition of the data items in the

Retain Message Store.

Finally, the Connector setting allows for the logical connection between criteria.

The "+ and -" buttons to the right of the window allow the user to add multiple search term lines. There is no limit to the amount of lines, or criteria, which may be added.

The Message type option

The message or data type is available to be restricted, or not, as desired.

The The Date Range is designed with appointments, tasks, and notes. IF the date range is used, in an effort to help locate information , a date range for the desired date applies. This is essentially a date range for the date ranges. This is a good way to look for tasks and appointments which were placed into the system before, and it was not removed later.

Once the search terms are satisfactory, select the 'Search' button to begin the search. Once the search has completed, the resulting group of messages is added to the Retain local archive, under the 'Retain search results' folder.

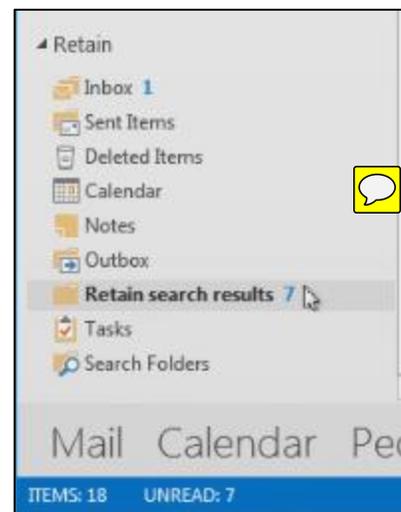
NOTE: It is important to note that the number outside the folders represents the 'unread' message count, not the total message count. To view the total message count, see the 'Items:' count at the bottom left of the Outlook window.

The screenshot shows the 'Retain. Advanced search' dialog box. It has two tabs: 'Easy search' and 'Advanced search'. The 'Advanced search' tab is active. The dialog contains a table with four columns: 'Search in', 'Condition', 'Keyword', and 'Connector'. Below the table are 'From date' (12/ 6/2013) and 'To date' (6/ 6/2014) fields, and a 'Date type' dropdown set to 'Created'. There are checkboxes for 'All message types', 'Mail', 'Appointment', 'Note', and 'Task'. A section for 'Specify the date range for appointments, tasks or notes' includes 'Start date range' and 'End date range' fields, each with 'Starting between' and 'Ending between' sub-fields. At the bottom are 'Search' and 'Cancel' buttons.

Contains (exact)
Contains (fuzzy)
Starts with
Ends with
Does not contain

Created
Created
Stored

AND
OR



Retain Outlook Plugin Settings

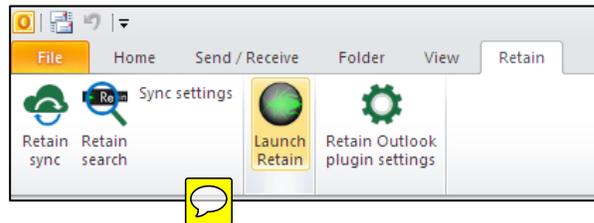
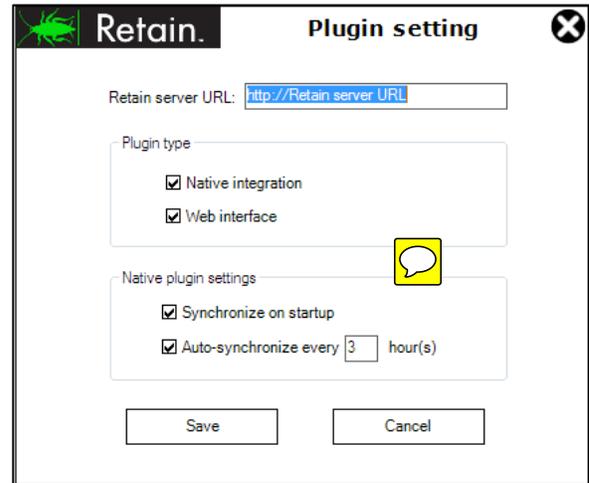
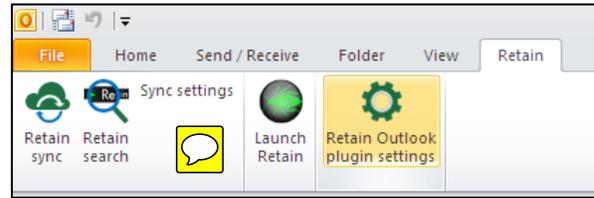
The Plugin settings button opens the plugin settings window. This is where the user can modify the basic plugin settings.

This window contains all connection and plugin settings. If the entries here are grayed-out, then the ability to change the settings has been disabled during install, and the setting information is display-only.

The connection URL should be specified with just the hostname or IP address. If a port number is required, it may also be specified, but is not necessary if Apache or IIS is handling requests for the Retain Server.

Launch Retain

The Launch Retain button is simply a single sign-on portal to the Retain web **interface** for users. This plugin opens a browser and uses the account credentials and logs into the 'search messages' web interface of the Retain Server.



Appendix A

Silent Install Commands

The silent install commands can be utilized in deploying the plugin. The following commands are provided for administrator use during the installation.

RETAINURL : The Retain server URL

MAXSYNC : Maximum number of items to be **synced** in every **synchronization**

DAYSAGOARCHIVED : **Synchronize** messages older than x days ago

USERNAME : The username of the user (email)

MESSAGESYSTEM : The type of messaging system. Values:

0 -> Exchange

1 -> GroupWise

FILTERTYPE : Filter messages based on the type during the **synchronization**.

It uses bit pattern to store the values:

0 -> No filter (All types)

1 -> Mail

2 -> Appointment

4 -> Note

8 -> Task

ARCHIVEFILEPATH : The path and the file name of the desired local NST file. The path should exist but not the NST file.

SCOPE : can get two values "perMachine" and "perUser"

perMachine: The plugin will be available for all the users of the machine

perUser: The plugin will be available to a specific user.

ISWEBUI : Web UI is enabled or not. (Values: true,false)

ISNATIVE : Native plugin is enabled or not. (Values: true,false)

HASAUTOSYNC : Auto-sync is enabled or not. (values: true,false)

SYNCINTERVAL : The interval of automatic **syncing** (integer number greater than 1, showing the interval in hours)

SYNCSTARTUP : Automatic **syncing** in enabled on startup or not (values:true,false)

CANCHANGESTTINGS : If the user can change the plugin settings(values: true,false)

CANCHANGURL : If the user can change the Retain server URL (values: true, false)

CANCHANGEPUGINTYPE : If the user can change the type of the plugin (values: true, false)

CANCHANGAUTOSYNC : If the user can change the automatic **syncing** settings (values:true,false)

DURATION : A non-zero positive integer showing the period which the messages are **synchronized**.

RANGE : The range of the period for **synchronization**.

0 --> Day(s)

1 --> Week(s)

2 --> Month(s)

3 --> Year(s)

The RANGE public property along with the DURATION public property show the period of the **synchronization**. For example if DURATION is set to 3 and RANGE is set to 2, they mean that the **synchronization** period is for 3 month.