BlueTie's Email Archival service is designed to address both legal compliance and email auditing needs. All messages sent and received by archived users are permanently stored online along with any attachments, and can be accessed and searched from any computer with an Internet connection. Pre-defined and ad hoc filters flag all messages containing the keywords you've defined as potentially worrisome, enabling fast and convenient review and action.

This document will provide a walkthrough on enabling Archive Services within your enterprise, choosing which users to audit, how to run archive searches and setup additional Archive Services users.

Enterprise Manager

The Enterprise Admin will have access to the Email Audit button within Enterprise Manager.

Email Audit Screen

Enterprise Manager

View Accounts   View Divisions   Create Account   Email Audit   Brand Enterprise   Enterprise Preferences

Email Audit

Save copies of incoming and outgoing user emails for administrative review.
Activating this feature may result in additional charges.

There is no audit activity to review. Click "Manage Accounts" to configure email audit settings for your users.

[Manage Accounts]   Activate, de-activate and manage audit settings for user accounts in your enterprise.

[View Audit Activity]   Review audited emails.

Notes

- The Email Audit display is dependent upon the status of the archive service. If the View Audit Activity button is inactive, as seen above, audit is not yet enabled for any users.

- If activation of Archive Services was recently requested for a group of users, the message would notify the user that a request is in progress. (See image below)
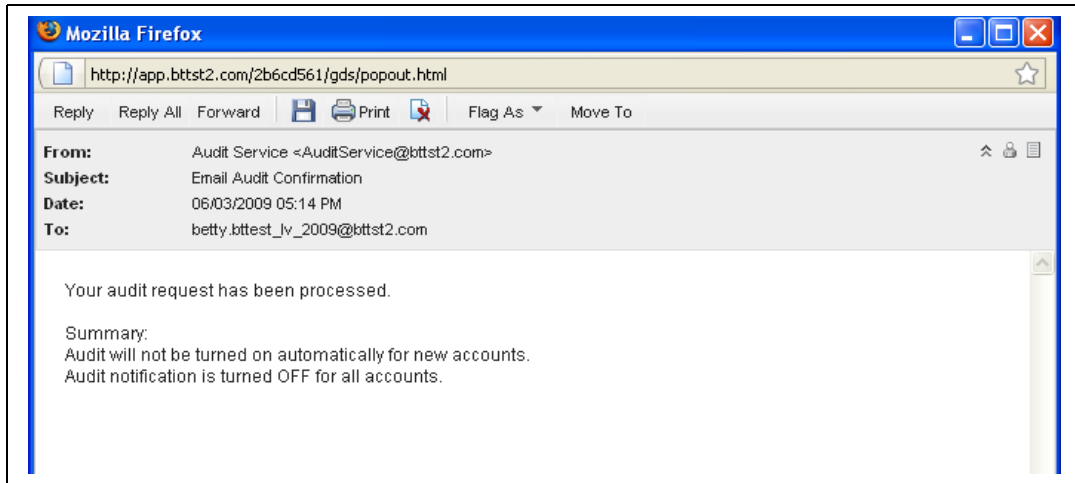
Email Audit

Save copies of incoming and outgoing user emails for administrative review.
Activating this feature may result in additional charges.

Your audit update has been submitted successfully.
It may take some time to process your update, depending on the size of your enterprise. When the update is complete, an email confirmation will be sent to the administrator of this enterprise.

[Manage Accounts]   Activate, de-activate and manage audit settings for user accounts in your enterprise.

[View Audit Activity]   Review audited emails.

- As soon as the request is processed, the administrator will receive a confirmation email.

- On the next visit to Email Audit within the Enterprise Manager, the message will be clear and both the Manage Accounts and View Audit Activity buttons will be active.
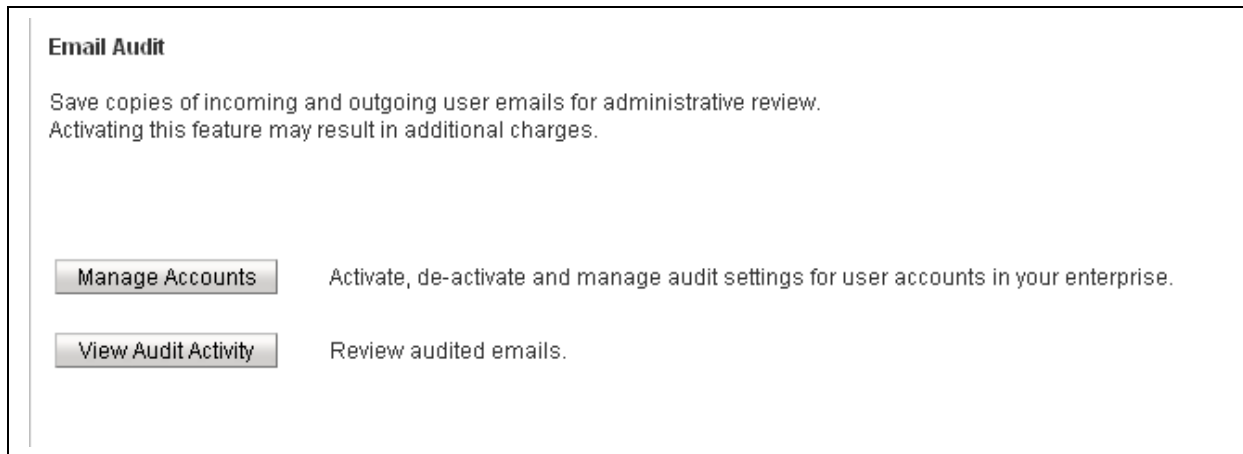
If for any reason View Audit Activity service is unavailable, the user will be prompted with a message asking them to try again later.
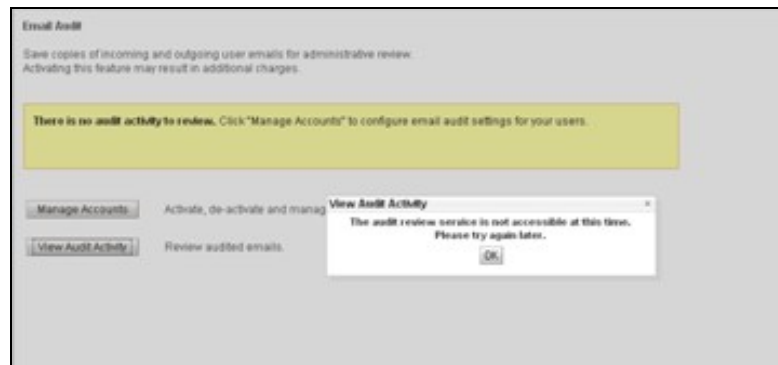
Manage Accounts

Clicking on the "Manage Accounts" button will bring the Enterprise Manager into an interface that will allow them to determine when and how Archive Services are enabled for specific, or all, users.

Notes

- The above screen shows the Manage Users screen before any use or user action.

- Note that this interface will display up to 50 users at one time. If there are more than 50 users in the enterprise, the page dropdown on the right of the screen will need to be used to manage those additional users.

- The Cancel button will cancel any action and return the user to the Email Audit page.

- Global Settings include Audit All and Notify All options.

  o **Always turn on auditing** – this global setting will turn on auditing for all current and future users.

  o **Audit all/Audit no accounts** – selects/deselects all accounts on the current page.

- The green dialog box is a status box and is dynamic depending on what action (if any) the user is taking on the screen. (See more states on the screens below)

Email Audit > Manage Accounts

Global Audit Settings

☐ Always turn on auditing for all accounts (includes current and future accounts created)

☐ Notify all accounts that they may be audited

[Audit all accounts]   [Audit no accounts]   Viewing: [1-5 ▾]

There are 5 accounts being audited.

Audited	Display name △	Email address
☑	Blue, Betty	betty.bttest_lv_2009@bttst2.com
☑	Patch, Sam	sam.bttest_lv_2009@bttst2.com
☑	Rock, Fred	fred.bttest_lv_2009@bttst2.com
☑	Sheep, Mary	mary.bttest_lv_2009@bttst2.com
☑	Smith, John	john.bttest_lv_2009@bttst2.com

Email Audit > Manage Accounts

Global Audit Settings

☑ Always turn on auditing for all accounts (includes current and future accounts created)

☐ Notify all accounts that they may be audited

[Audit all accounts]   [Audit no accounts]   Viewing: [1-5]

You have chosen to automatically turn on auditing for all accounts.
Click "Submit changes" to process your request.

Audited	Display name △	Email address
☑	Rock, Fred	fred.bttest_lv_2009@bttst2.com
☑	Patch, Sam	sam.bttest_lv_2009@bttst2.com
☑	Sheep, Mary	mary.bttest_lv_2009@bttst2.com
☑	Blue, Betty	betty.bttest_lv_2009@bttst2.com
☑	Smith, John	john.bttest_lv_2009@bttst2.com

Email Audit > Manage Accounts

Global Audit Settings

☐ Always turn on auditing for all accounts (includes current and future accounts created)

☐ Notify all accounts that they may be audited

[Audit all accounts]   [Audit no accounts]   Viewing: [1-5 ▾]

Turn auditing ON for 1 account and OFF for 1 account.
Click "Submit changes" to process your request.

Audited	Display name △	Email address
☑	Blue, Betty	betty.bttest_lv_2009@bttst2.com
☑	Patch, Sam	sam.bttest_lv_2009@bttst2.com
☐	Rock, Fred	fred.bttest_lv_2009@bttst2.com
☐	Sheep, Mary	mary.bttest_lv_2009@bttst2.com
☑	Smith, John	john.bttest_lv_2009@bttst2.com

View Audit Activity

Once Archive Services have been activated for one or more users, the "View Audit Activity" button on the Email Audit page within Enterprise Manager is enabled. Clicking that button will open up a new tab/window within your browser, and bring you to the screen below.

NOTE: You may need to disable pop-up blockers before this page will open.

Comments

- The above image shows the Archive Services Dashboard upon first login.

- This type of account is known as the Account Owner and is equivalent to the Enterprise Admin. Like the Enterprise Admin, only one Account Owner is allowed per enterprise.

- As the Account Owner, this user will have two dashboards; one is known as the Admin and the other is the Audit Administrator.

Creating a Search
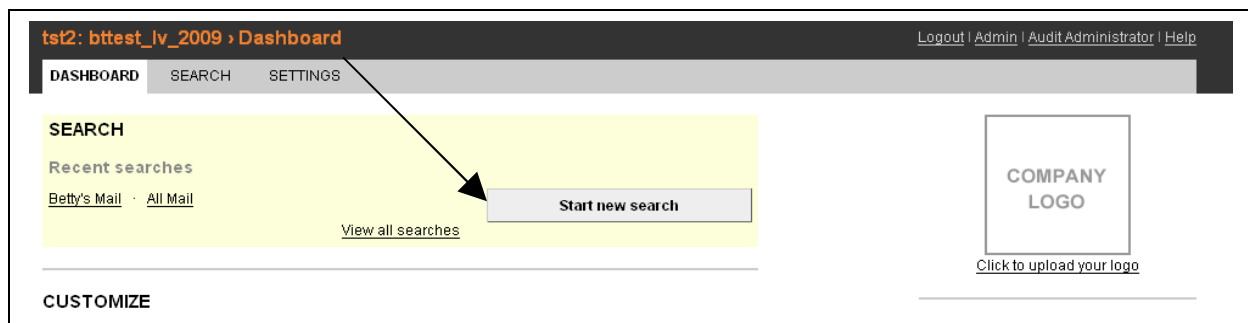
Notes:

- There is a "Start New Search" box presented on the dashboard upon login.

- A search may also be initiated by clicking on the "Search" heading, then selecting "Start New Search".

- Once a new search is started, users must select to run a Simple, Wizard or Advanced search

  o **Simple Search** allows you to define a list of search terms (words or phrases) that can be found in the Message Body or Attachments.

  o **Wizard Search** provides a structured condition editor to create various AND/OR operators for your search.

  o **Advanced Search** expands upon the search criteria allowed in a Simple Search. You can expand from date range and basic word search to find specific senders, recipient combinations and much more.

The following fields and parameters are available for all new searches:

1. Name of Search
2. Assign any special Tags that will be used with this Search
3. Assign access permissions
4. Document any search notes
5. Set a search range
6. Begins/Ends
   NOTE: You must use the calendar to choose a date. Make sure to click OK pop-up calendar or your date will not be saved.

Administration

NOTES:

- The archiving service audits all user interaction within the system, including all administrative functions.

- A report must be generated to obtain this information, and can be initiated by clicking on the "Admin" button at the top of the interface, then clicking on the "Reports" tab.

- This report is provided in either CSV or PDF format.

- Available Report Types:

o   Activity by User

o   Activity by UI Action

o   Activity by Date

o   Collection by Mailbox

o   Collection by Date

Creating Users

Notes:

- The Account Owner, once logged into the Admin section of the Archival Service has the ability to assign access to the Archival Service to other individuals.

- Additional users may be other members of the enterprise, or outside or 3rd party consultants or auditors.

- This may be initiated by clicking on the "Admin" button at the top of the interface, then clicking on the "Users" tab. This will display a list of all users, and you will find an "Add User" button on the right.

User Types

- **Account Owner (AO)** is the highest level permission within the system. This will be the default user type assigned to the Enterprise Manager.
- **Archive Administrator (AA)** is a role likely filled by an individual or group of individuals within the IT organization. They can create and manage users and their permissions as well as create and modify searches.
- **Search Administrator (SA)** is responsible for creating and managing Searches. They may create new and edit existing searches as well as export search details.

- **Search User (SU)** is responsible for reviewing the search results created by the Search Administrator. The Search User cannot create a new Search and can only change the scope of a Search if that right has been assigned to them by the Search Administrator.

NOTE: Users can be set up with permanent or temporary access. To provide temporary access, there is an option to set an expiration date. This may be assigned to a 3rd party auditor that needs access for a pre-defined period of time.

Also, we recommend expiring inactive users who may need access in the future. Only delete a user if it is highly unlikely that they will need access in the future.

NEW USER

Username

First and last name

Email

Email (confirm)

Temp. password

The user will need to change the password after they login.

Permissions

☐ Account Admin (AA)
Account Admins can manage system settings, users and collectors.

☐ Search Admin (SA)
Search Admins can create new searches and manage search settings.

☐ Search User (SU)
Search Users can only access the searches created by Search Admins.