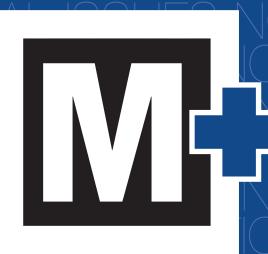
M+Analytics for End Users

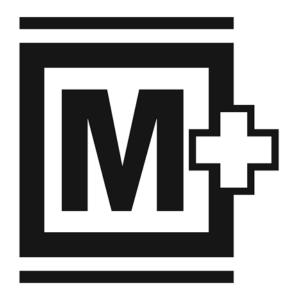






#### **M+Analytics User Guide**

2010.1, version 1.0, 15 November 2010





# Trademarks

Messaging Architects	M+Archive <sup>TM</sup> , M+Analytics <sup>TM</sup>
Microsoft Corporation	Internet Explorer <sup>TM</sup>
Mozilla	Firefox®

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**Document Version** *M*+*Analytics User Guide* 2010.1, version 1.0, 15 November 2010

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# Contents

Contents	
1 Introducing M+Analytics	7
1.1 Accessing M+Analytics	
1.1.1 Accessing M+Analytics Through a URL Link	7
1.1.2 Accessing M+Analytics Through GroupWise WebAccess and WebViewer	7
1.1.3 Accessing M+Analytics Through the Outlook Client	
1.1.4 Accessing M+Analytics Through Outlook Web Access	9
1.2 Customizing M+Analytics	10
1.2.1 Changing Languages	. 10
1.2.2 Applying Themes	. 11
2 Archive Overview	13
2.1 Folder View	13
2.2 Filter View	
2.3 Message View	
2.3.1 Previewing messages	. 14
2.3.2 Sorting Messages	
2.3.3 Displaying Columns	
2.3.4 Selecting Page Size	
2.4 Performing Actions on Messages	18
2.4.1 Forwarding Messages	. 18
2.4.2 Printing Messages	. 19
2.5 Calendar View	20
2.5.1 Day View	. 21
2.5.2 Week View	. 22
2.5.3 Month View	. 23
2.5.4 List View	. 24
2.5.5 Viewing Calendar Items	
3 Filters and Advanced Searching	27
3.1 Filters	27
3.1.1 Conducting Multiple Filtered Searches	. 27
3.1.2 Filtering by Archive Folder	. 28
3.1.3 Using Filters	. 28
3.2 Advanced Searching	29
3.2.1 Keyword Search	. 29
3.2.2 Message Search	
3.2.3 Attachment Search	. 32
3.3 Viewing Search Results	
3.4 Logging Out	34

# About M+Archive

M+Archive is an enterprise-class electronic messaging solution that helps organizations address their current and future challenges of email archiving, retention, regulatory compliance, and fast retrieval of email messages. M+Archive integrates seamlessly and transparently into your corporate email system, improves server performance, lowers storage costs, and offers you the tools to individually or globally search archived messages in aid of legal discovery, regulatory compliance, or organizational policy enforcement.

# **About M+Analytics**

M+Analytics is an easy-to-use web-based electronic discovery tool that allows users to intelligently search, retrieve, view, and manage their archived data in a simple and timely manner. M+Analytics' advanced search features and guided navigation allow for quick and accurate searching and easy viewing.

# About this User Guide

This user guide is intended for the average email user. It assumes that you have a working knowledge of your computer and its operating system. The guide is structured in a series of tasks to help you learn how to use M+Analytics as quickly as possible. The guide will walk you through each of the tasks you can perform in M+Analytics.

# **Style Conventions**

The following style conventions are used in this guide:

- The names of files, directory paths, and guides appear in italics. For example,
  - The data is stored in the sample.xml file.
  - The file is located in your C:\Program Files\Messaging Architects folder.
  - Please refer to your *M*+Analytics User Guide.
- Menus and commands that you need to choose are displayed in the form
   Menu > Command. For example, File > Save means click File in the menu bar, then click Save in the menu that appears.
- The names of keys are displayed in small capital letters, such as CTRL key.
- A plus (+) sign is used to indicate combinations of keys and/or mouse operations. For example:
  - CTRL+C means to hold down the CTRL key while pressing the C key.
  - SHIFT+click means to hold down the SHIFT key while you click an item with the mouse.

# Symbols

Throughout the guide, you will sometimes see special symbols in the margins. The symbols are intended to supplement the information in the section where they are found. These symbols serve different functions based on the icon used to represent them. The types of symbols are:



**Note:** This symbol provides supplemental information and/or configuration tips. Look for this symbol if you want to find additional information for the subject that is being discussed.



**Important:** This symbol indicates that the information described in the corresponding section is important. Pay attention to this symbol when you encounter it.



**Warning:** This symbol lets you know when something requires caution. The goal of this symbol is to let you know about the potential errors into which you might run when using the function in question.



**Tip:** This symbol provides additional configuration tips. Look for this symbol if you want a tip on how to accomplish something.

# 1 Introducing M+Analytics

M+Analytics is an easy-to-use web-based electronic discovery tool that allows individual users to intelligently search, retrieve, view, and manage their archived items in a simple and timely manner. The benefit of M+Analytics lies in its advanced search features and guided navigation. The tool's advanced search features allow for word list usage, exact phrase matching, forbidden term searching, approximate spelling matching, and more. Users can also build their own customized search queries, meaning they are never limited to default search criteria. Any customized searches can also be saved as templates for future use. With guided navigation, users can sort their search results for easy viewing.

# 1.1 Accessing M+Analytics

End users can easily access M+Analytics through a URL link provided by their system administrator. Alternatively, GroupWise users can access M+Analytics directly through GroupWise WebAccess and WebViewer, while Exchange users can access it through Outlook Web Access and their Outlook client.

## 1.1.1 Accessing M+Analytics Through a URL Link

To access M+Analytics through a URL link, follow these steps:

- 1 Follow the URL link provided by your system administrator, or open your web browser and enter the URL directly in the browser's address bar.
- 2 On the M+Analytics login screen, enter your user name and corresponding password in the available text boxes. You can also choose your preferred language from the **Language** dropdown list. Available languages include English, French, French (Canadian), and German.
- Login Language -Login Language -Password: Login Language -Password: Password: P
- 3 Click Login.

Figure 1-1: M+Analytics login

# 1.1.2 Accessing M+Analytics Through GroupWise WebAccess and WebViewer

To access M+Analytics through GroupWise WebAccess and WebViewer, follow these steps:

- **1** Open your web browser, navigate to your GroupWise login screen, and login to your GroupWise WebAccess account.
- 2 In your WebAccess mailbox, click the **Archive** link in the top right-hand corner of your screen.

Novell <sup>®</sup> GroupWise <sup>®</sup> V	WebAcces	is	Feb 12, 2010 Eastern Stand			Archive	Help Options	5 Logout
Mailbox Calandar Conta	acts Docum	ents						
🔗 New 🔻 🏠 Address Book 🛔	🖁 Ртоху 🛅	Manage Folders				Search for messages	containing	Find D
🖻 🙆 Alexander Velarde	🕞 Update	Purge Delete	🛛 🙀 Accept 📷 Decline 🥙 Complete 🚳 Read Later	Mark Read	es			
Mailbox	1	Name	Subject	Date	Size			3
Unopened Items		Roland Gaspar	Conan	2/12/10	3	L KB	1	
A Sent Items		Osman Baig Consultant Toe	Full HTML Message Rolivian Drecident 1-465-481-484-484	9/2/09 9:58 PM		KB .	Archive link	

Figure 1-2: WebAccess > Archive link

You are redirected to your archived email located in M+Archive WebViewer.

3 In M+Archive WebViewer, click the **M+Analytics** link in the top right-hand corner of your screen.

M+Archive <sup>®</sup> WebViewer			Feb 12, 2010 (Friday) Eastern Standard Time		Mail M+Analytics Logo
Archive Calendar Search					
🗏 😭 GW-All-Users	Print V	iew 🖏 Forward Show	ving messages: 1 to 20 of 81	/	Find
👝 Mailbox	<b></b>				Date
Sent items Cabinet		Roland Gaspar	Conan		10/31/09 11:00 PM
E Calendar		P Osman Baig	Full HTML Message	M+Analytics link	9/2/09 8:58 PM
# C Trach	<b>—</b> (53)	Concultant Ino	Rollin Descident 1-465-401-404-40431		6/12/00 10-20 AM

Figure 1-3: WebViewer > M+Analytics link

You are redirected to M+Analytics, and your archive overview is displayed.

Search × +							
older	8	31	Pre	view •		Guick search	P Search - Preference
Archives				From	Subject		Received
	1	6		Sacha Veillette	To piece together		08/26/10 4:57 PM
	12	6		Justin Houde	Re: Jackson		08/26/10 3:49 PM
	0	6	. 1	Andrea Kostyk	Jackson		08/26/10 3:49 PM
ter	0	6	6	Andrea Kostyk	GW + AWA on NODS?		08/26/10 2:23 PM
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Not Defined(12.88%) Dutch(0.73%)		-		Michael Dybala	MD - Out Of Office		08/25/10 4:43 PM
French(0.33%)		6	-	Pierre Chambers	thinking like a customer - when to drop the rtp		08/25/10 5:34 PM
tem Type	6	6		Jean-Marc Noiseux	TS		08/24/10 5:22 PM
received(73.97%)		8		Nick Stefan	Dashboard		08/24/10 5:04 PM
sent(25.83%)		6	-	Jack Newman	Tips&Tricks: Creating A Mini Table of Contents		08/24/10 4:51 PM
personal(0.20%)							
Opened		8		Stephanie Greenshields	Bret		08/24/10 11:51 AM
Ves(99.87%)		6		Dena Kamel	Some More Bells		08/24/10 10:43 AM
No(0.13%) Read		12		Matthew Zageris	Fwd: Signatures		08/24/10 10:17 AM
Ves(99.47%)	D	6		Matthew Zageris	Signatures		08/24/10 9:57 AM
No(0.53%)		6	6	Dena Kamel	Team 7 Session Location/Dial In Information		08/24/10 2:09 AM
Created Date		6	8	Dena Kamel	Agenda for Tomorrow		08/23/10 3:34 PM
4 2010(80.17%)		6	6	Michael Mastine	Create Issue		08/23/10 2:03 PM
August(12.55%)		6	1 1	Dena Kamel	Congratulations Ryani		08/23/10 1:29 PM
January(11.75%)			6	Maximilian Morgan	otavilog has edited a Web Meeting		08/18/10 4:19 PM
July(10.01%)		8	6	Dindminvtations <dindim.helper@di< td=""><td>Your Web Meeting has started</td><td></td><td>08/23/10 12:15 PM</td></dindim.helper@di<>	Your Web Meeting has started		08/23/10 12:15 PM
February(9.68%)		6	6	Dena Kamel	Bells Bells Bells and Some More Bells		08/23/10 10:43 AM
June(9.41%)			0	Frederic Bourget	Team Meeting		01/21/10 4:54 PM
2009(19.83%) November(12.28%)		6	. 6	Andrea Kostyk	Team 7's ideas		08/23/10 9:56 AM
December(7.54%)		-	1 6	Michael Dybala	MD - Out Of Office		08/20/10 9:08 PM
Received Date		1 8		Pierre Chambers	Complex Sales		08/22/10 11:41 PM
4 2010(80.21%)	10	6		Charles Nauven	Service Pack		08/22/10 9:02 AM
August(12.83%)	-	6		Andrea Kostyk	quickstart card		08/21/10 12 48 PM

Figure 1-4: M+Analytics archive overview

## 1.1.3 Accessing M+Analytics Through the Outlook Client

To access M+Analytics through the Outlook client, follow these steps:

1 Open your web browser, navigate to your Outlook login screen, and login to your Outlook email account.

2 In your Outlook mailbox, click the **M+Archive** folder on the left-hand side of your screen. The M+Analytics archive overview screen is displayed directly in your Outlook client.

[] "/ I≠			M+4	nah	/tics	- Microsoft Outlook			0
Home Send / Receive	Folder View								3
New New nail Rems - New Delete	Reply Reply Forward Bg More -	6	Move to: Team E-m Reply & C	ail Delet		Create New	Move Rules OneNote Read	Up - Y Filter E-r	Book
	Respond	-			2010	k Steps 👘	Move Tags	Find	-
alexander@ma.com	Analytics   Messaging	Arch	nitects					ai	еж •
Drafts [2]	Search 8 +								
Sent Items  Deleted Items (2)	Folder		a A1		Pre	view •	Quick search	Search · Preference:	
Cabinet	Archives		<b>F1</b>			From	Subject	Received	
Calendar			6	0	6	Sacha Veillette	To piece together	08/26/10 4:57 PM	^
S Contacts	M+Archive folder			0	8	Justin Houde	Re: Jackson	08/26/10 3:49 PM	
Journal			1	8	8	Andrea Kostyk	Jackson	08/26/10 3:49 PM	
Junk E-Mail	Filter		E1	0	8	Andrea Kostyk	GW + AWA on NODS?	08/26/10 2:23 PM	
M+Archive /	# Language	^	0	8	0	<nods@messacincarchitects.c< td=""><td>NODS Demo is Provisioned</td><td>08/26/10 1:55 PM</td><td></td></nods@messacincarchitects.c<>	NODS Demo is Provisioned	08/26/10 1:55 PM	
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RSS Feeds	Not Defined(12.88%)			-	4	Michael Dybala	MD - Out Of Office	08/25/10 4:43 PM	
Go Search Folders	Dutch(0.73%)			8		Pierre Chambers	thinking like a customer - when to drop the rtp	08/25/10 5:34 PM	
Suggested Contacts	# tem Type		0	8		Jean-Marc Noiseux	TS	08/24/10 5:22 PM	
🛃 Tasks	[]received(73.97%)		0	0		Nick Stefan	Dashboard	08/24/10 5:04 PM	
Public Folders - alexander@mademo.	sent(25.83%)		0	0		Jack Newman		08/24/10 4:51 PM	
	personal(0.20%)			-		and the second	Tips&Tricks: Creating A Mini Table of Contents		
	# Opened		0	8		Stephanie Greenshields	Bret	08/24/10 11:51 AM	
	Ves(99.87%)			8	6	Dena Kamel	Some More Bells	08/24/10 10:43 AM	
Mail	No(0.13%)			0	U	Matthew Zageris	Fwd: Signatures	08/24/10 10:17 AM	
Calendar	# Read [Yes(99.47%)]		*	2	6	Matthew Zageris	Signatures	08/24/10 9:57 AM	
Contacts	No(0.53%)			0	6	Dena Kamel	Team 7 Session Location Dial In Information	08/24/10 2:09 AM	
Contacts	4 Created Date				8	Dena Kamel	Agenda for Tomorrow	08/23/10 3:34 PM	
Tasks	a 2010(80.17%)			8	6	Michael Mastine	Create Issue	08/23/10 2:03 PM	
1	August(12.55%)			8	6	Dena Kamel	Congratulations Ryan!	08/23/10 1:29 PM	
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Shortcuts	February(9.68%)		8	9	ű	Dena Kamel	Bells Bells and Some More Bells	08/23/10 10:43 AM	~
	▲ 2009(19.83%)	~					Displaying 1 - 100 of 1498 🕴 🕴 Page	1 of 15 🕨 🕅	2

Figure 1-5: Outlook integration of M+Analytics

## 1.1.4 Accessing M+Analytics Through Outlook Web App

To access M+Analytics through Outlook Web App, follow these steps:

- **1** Open your web browser, navigate to your Outlook Web App login screen, and login to your Outlook Web App account.
- 2 In your Outlook Web App mailbox, click the M+Archive link located in the folder list in the lower left-hand side of the screen. You are redirected to M+Analytics, and your archive overview is displayed. To return to Outlook Web App, simply log out of M+Analytics, and you will be automatically redirected to Outlook Web App.

Outlook Web App			Alexander Velarde - Sign out						
Mail	Inbox (68 Items, 23 Unread)		🙀 2 - Options 🛄 Find Someone. 😰 -						
<ul> <li>Pavorites</li> <li>Inbox (23)</li> <li>Unread Mail (26)</li> <li>Sent Items</li> <li>Deleted Items (2)</li> </ul>	Search Inbox	• View • 0 0 . * ston Top •	Collapse Al Newest on Top						
Alexander Velarde	Next Action Field Consultant Joe	6/12/2009	Consultant Joe [consultant@groupwise8.com]     Actions -      Actions -      Consultant @groupwise8.com]     Fridey, June 12, 2001 11:37 AM     Fridey, June 12, 2001 11:37 AM						
Cabinet     M+Archive     Morafts [2]     Sent Items	Email System     Owen Swerkstrom     Social Insurance Numbers in Canada     Mark Crisein	[] 약 6/12/2009 [] 약 5/4/2009	Hi, to get to the opportunity. In SLX, click the opportunity tab on the left hand side. you can right click on the opportunity button and search for the opp that you need to update. The opportunity View should come up. If you get the						
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<ul> <li>General Folders</li> <li>General Folders</li> </ul>	Ken Heister M-Guardian 2008.4 and TLS Sean Scourse	4/17/2009	list view then hit F8 and you will get the page that I've attached.						
M+Archive link	A Helio and Good-bye Jeff Dalby	[] や 2/11/2009	Let me know if you have any questions Thanks						
	<ul> <li>I understand Thane Diamond</li> <li>Netmal is to Zimbra as Thunderbird is to?</li> </ul>	[] 약 1/5/2009 [] 약	Joe						
Anil	Owen Swerkstrom	1/5/2009							
M+Archive	Secure File Transfer at Messaging Architects "Tracy Jordan" <tracy@30rock.org></tracy@30rock.org>	[] ♥ 11/4/2008							
Calendar	M+Archive Servers	91							
Contacts	Sean Scourse Odd Odor	10/10/2008							
✓ Tasks ✓ Public Folders	Pierre Chamberland  Changes to salesteam  Pierre Chamberland	10/10/2008							

Figure 1-6: Accessing M+Analytics through Outlook Web App

# **1.2 Customizing M+Analytics**

With M+Analytics, you have the option of applying different settings to customize your archive overview screen. More specifically, you can change your preferred interface language, and you can apply different themes to your archive overview.

## 1.2.1 Changing Languages

To change the language of the M+Analytics interface, click the arrow next to your user name in the top right-hand corner of the archive overview screen. Select **Language**, and choose your preferred interface language. You can choose from English, French, French (Canadian), and German.



Figure 1-7: Selecting language

## 1.2.2 Applying Themes

You can apply different themes to the M+Analytics interface to change the look of your archive overview screen.

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D #b	From	Subject te fo piece together.		t failer	G Gal Breiter *	Data ment Plant + Pateron
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#### Figure 1-8: Themes

To change the theme, click the arrow next to your user name in the top right-hand corner of the archive overview screen. Select **Theme**, and choose your preferred theme. You can choose from **Default (grey)**, **Blue**, or **Accessibility**.



The Accessibility theme is designed to provide better readablitity for users with impaired vision.

		andrea
	0	Language 🕨
•	Default (gray)	Theme 🕨
	Blue	Help
	Accessibility	About
ted	11.08/10 4:45 Ph	Log out
	11.08/10 3:26 PM	Log out

Figure 1-9: Selecting themes

## **Your Notes**

# 2 Archive Overview

Once you have logged into M+Analytics, you are presented with an overview of your archived messages. The archive overview screen allows you to select and view your archived messages. You can also customize how messages are displayed on the screen. Furthermore, you can manage your searches and navigate between searches at any time.

	Search +								
	Folder	6	31	Previe			Guick search	P Search · Prefer	rences
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	Not Defined(12.88%)		*		Aichael Dybala	MD - Out Of Office		08/25/10 4:43 PM	
	Dutch(0.73%)				Verre Chamberland	thinking like a customer - when to drop the rfp		08/25/10 5:34 PM	
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	sent(25.83%)		-	-					
	personal(0.20%)		-14			Tips&Tricks: Creating A Mini Table of Contents		08/24/10 4:51 PM	
	Opened		8		Stephanie Greenshiekds	Bret		08/24/10 11:51 AM	
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ssage —	No(0.13%)	5	- 23		Aatthew Zageris	Fwd: Signatures		08/24/10 10:17 AM	
w	Read Yes(99.47%)				Aatthew Zageris	Signatures		08/24/10 9.57 AM	
	No(0.53%)			6 0	Dena Kamel	Team 7 Session Location/Dial In Information		08/24/10 2:09 AM	
	# Created Date			6 0	Dena Kamel	Agenda for Tomorrow		08/23/10 3:34 PM	
	4 2010(80.17%)			U N	Aichael Mastine	Create Issue		08/23/10 2:03 PM	
	August(12.55%)			6 0	Dena Kamel	Congratulations Ryani		08/23/10 1:29 PM	
	January(11.75%)	2		Ű N	Aaximilian Morgan	otavilog has edited a Web Meeting		08/18/10 4:19 PM	
	July(10.01%)			6 0	)indimInvitations <dindim.helper@di< td=""><td>Your Web Meeting has started</td><td></td><td>08/23/10 12:15 PM</td><td></td></dindim.helper@di<>	Your Web Meeting has started		08/23/10 12:15 PM	
	February(9.58%)	10		6 0	Dena Kamel	Bells Bells and Some More Bells		08/23/10 10:43 AM	
	4 2009(19.83%)			Ű F	rederic Bourget	PM Team Meeting		01/21/10 4:54 PM	
	November(12.28%)	12		6 A	Andrea Kostyk	Team 7's ideas		08/23/10 9:56 AM	
	December(7.54%)		2	U N	Aichael Dybala	MD - Out Of Office		08/20/10 9:08 PM	
	# Received Date	10	1 8	P	Vierre Chamberland	Complex Sales		08/22/10 11:41 PM	
	4 2010(80.21%)	10	8	8 0	Charles Nguyen	Service Pack		08/22/10 9:02 AM	
	August(12.83%)	12		A	Andrea Kostyk	quickstart card		08/21/10 12:48 PM	

Figure 2-1: Archive overview

By default, three main window panes appear on the archive overview screen:

- Folder view
- Filter view
- Message view

## 2.1 Folder View

The folder view lists the archive stores in which your archived data is located.

## 2.2 Filter View

The filter view lists the available filters for performing guided navigation. M+Analytics allows you to narrow the data shown in your message view based on a wide variety of parameters, called filters. These filters make it easy for you to locate the specific data that you want to view. Once you apply the filters, only those messages selected through the filters are shown in the message view.

For more information about applying filters in M+Analytics, see "Filters and Advanced Searching" on page 27.

# 2.3 Message View

By default, the message view is the main portion of the archive overview. The message view provides a list of all your archived messages.

### 2.3.1 Previewing messages

The default message view simply lists the messages located in your archive. However, you can also choose to preview individual messages. To preview messages, click **Preview**, and select either **Bottom pane** or **Side pane** from the dropdown list. **Bottom pane** displays the contents of a selected message at the bottom of the screen, while **Side pane** displays the contents of a selected message on the right side of the screen. To return to the basic list view, select **No preview**.

	à I 📃	Pri	eview *		Quick search	P Search - Prefe	erences
			No preview	Subject		Received	
1	6	•	Bottom pane	To piece together		08/26/10 4:57 PM	
	- 4		Side pane	Re: Jackson		08/26/10 3:49 PM	
	4	w	Anurea Nostyn	Jackson		08/26/10 3:49 PM	
		ß	Andrea Kostyk	GW + AWA on NODS?		08/26/10 2:23 PM	
	8	6	<nods@messagingarchitects.co< td=""><td>NODS Demo is Provisioned</td><td></td><td>08/26/10 1:55 PM</td><td></td></nods@messagingarchitects.co<>	NODS Demo is Provisioned		08/26/10 1:55 PM	
		6	<nods@messagingarchitects.co< td=""><td>NODS Demo Provisioning Scheduled</td><td></td><td>08/26/10 1:53 PM</td><td></td></nods@messagingarchitects.co<>	NODS Demo Provisioning Scheduled		08/26/10 1:53 PM	
	2	6	Michael Dybala	MD - Out Of Office		08/25/10 4:43 PM	
	8	6	Pierre Chamberland	thinking like a customer - when to drop the rfp		08/25/10 5:34 PM	
	2	6	Jean-Marc Noiseux	TS		08/24/10 5:22 PM	
8		8	Nick Stefan «Nick Stefan@mess	Dashboard		08/24/10 5:04 PM	
1	8	6	"Jack Newman" <newmanj@wel< td=""><td>Tips&amp;Tricks: Creating A Mini Table of Contents</td><td></td><td>08/24/10 4:51 PM</td><td></td></newmanj@wel<>	Tips&Tricks: Creating A Mini Table of Contents		08/24/10 4:51 PM	
		6	Stephanie Greenshields	Bret		08/24/10 11:51 AM	
		15	Dena Kamel	Some More Bells		08/24/10 10:43 AM	
Pres	cierus.		Properties		Displaying 1 - 100 of 1498	I Page 1 of 15 ₽	NIG
From			Sacha Veillette				
	•						
To:			Andrea Kostyk				~
Rece	ived:		08/26/10 4:57 PM				
Subj	ect:		To piece together				
Atta	chmer	nts	D TEXT.htm D MOJ gw	a08192010 4.pdf Disignature énoncé de projet.pdf			
Helio							~
riga.	•						
Here	they a	re					
		es in	to the many, in replacement of a sp	pecific one (page 11).			
The	one goe						
The							

Figure 2-2: Bottom pane view

			No preview	Subject	Received	Preview	Properties	
1	é		Bottom pane	To piece together	08/26/10 4:57 PM	From:	Sacha Veillette	
3	E	•	Side pane	Re: Jackson	08/26/10 3:49 PM	To:	Andrea Kostyk	*
	i la		Mille da Nussiya	Jackson	08/26/10 3:49 PM			
	2	1.0	Andrea Kostyk	GW + AWA on NODS?	08/26/10 2:23 PM	Received:	08/26/10 4:57 PM	
1	8	1 6	I «nods@messagingarchitects	cor NODS Demo is Provisioned	08/26/10 1:55 PM	Subject:	To piece together	
=	8	1 1	I «nods@messagingarchitects	cor NODS Demo Provisioning Scheduled	08/26/10 1:53 PM	Attachments:	TEXT.htm D MOJ qwa08192010 4.pdf	
	-	1 0	Michael Dybala	MD - Out Of Office	08/25/10 4:43 PM		signature énoncé de projet.pdf	
	8	1	Pierre Chamberland	thinking like a customer - when to dr	08/25/10 5:34 PM	Hello,		
	6	1 1	Jean-Marc Noiseux	TS	08/24/10 5:22 PM	Here they are		
	8	1 6	Nick Stefan <nick stefan@me<="" td=""><td>ess Dashboard</td><td>08/24/10 5:04 PM</td><td></td><td></td><td></td></nick>	ess Dashboard	08/24/10 5:04 PM			
	6	1 6	Jack Newman" «newmanj@	wel Tips&Tricks: Creating A Mini Table o	08/24/10 4:51 PM	The one goes into	the many, in replacement of a specific one (page 11).	
	6	1 6	Stephanie Greenshields	Bret	08/24/10 11:51 AM	Thusks		
	8	1 6	Dena Kamel	Some More Bells	08/24/10 10:43 AM	Thanks.		
	8	1 6	Matthew Zageris	Fwd: Signatures	08/24/10 10:17 AM			
	8	1 6	Matthew Zageris	Signatures	08/24/10 9.57 AM	Cheers,		
	8	1 1	Dena Kamel	Team 7 Session Location/Dial In Info	08/24/10 2:09 AM			
	8	1 6	Dena Kamel	Agenda for Tomorrow	08/23/10 3:34 PM	Sacha		
	6	1 6	Michael Mastine	Create Issue	08/23/10 2:03 PM			
1	8	1.6	Dena Kamel	Congratulations Ryan/	08/23/10 1:29 PM			
	m	1 4	Maximilian Morgan	otavilog has edited a Web Meeting	08/18/10 4:19 PM			
=	8	1 6	Dindininvitations <dindin hel<="" td=""><td>Your Web Meeting has started</td><td>08/23/10 12:15 PM</td><td></td><td></td><td></td></dindin>	Your Web Meeting has started	08/23/10 12:15 PM			
	8	1 6	Dena Kamel	Bells Bells Bells and Some More Bel	08/23/10 10:43 AM			
	111	1 4	Frederic Bourget	PM Team Meeting	01/21/10 4:54 PM			
	6		Andrea Kostyk	Team 7's ideas	08/23/10 9:56 AM			
	2	1 6	Michael Dybala	MD - Out Of Office	08/20/10 9:08 PM			
	1 8	1	Pierre Chamberland	Complex Sales	08/22/10 11:41 PM			
	6	1 6	Charles Nguyen	Service Pack	08/22/10 9:02 AM			
3	6		Andrea Kostyk	quickstart card	08/21/10 12:48 PM			

Figure 2-3: Side pane view

#### **Preview Tab**

Whether you are in **Bottom pane** or **Side pane** view, the **Preview** tab is selected by default. The **Preview** tab displays who the selected message is from, to whom it was sent, when it was received, the message subject, if there are any attachments, and the message contents.

#### **Properties Tab**

Click the Properties tab. The Properties tab displays the main properties of the selected message.

Preview	Properties		
Property		Value	
E Message ID		4C769CED.GV/MTL_MAPO.100.1787534.1.E26.1	
E Message typ	pe	Mail	
From From		Sacha Vellette	
E Subject		To piece together	
Scheduled of	date	2010-08-26 16:57:17	
E Creation dat	te	2010-08-26 16:57:17	
🗉 🧰 Attachment:	\$	3	
E Box type		Inbox	
Priority		Standard	
E Read		read	
E Accepted		Accepted	
Completed		Completed	
E Return notifi	ication when opened	true	
E Return notifi	ication when deleted	true	
E Return notifi	ication when completed	true	
E Return notif	ication when declined	true	
E Return notifi	ication when accepted	true	

Figure 2-4: Properties tab > Bottom pane view

## 2.3.2 Sorting Messages

To rearrange the order of the displayed messages, position your mouse over the heading of the column you want to use to sort the messages, and click the arrow to activate the dropdown list. From the list, select either **Sort Ascending** to sort messages in alphabetically ascending order or **Sort Descending** to sort data in alphabetically descending order. Alternatively, you can simply click the column heading to toggle between sorting the messages in ascending order or descending order.

From	▼ Subject
Sacha Veillette	21 Sort Ascending
Justin Houde	X↓ Sort Descending
the state of the second st	

Figure 2-5: Message sorting

### 2.3.3 Displaying Columns

In the message view, the **From**, **Subject**, and **Received** columns are shown by default. To select the columns you want displayed in the message view, position your mouse over any column heading, and click the arrow to activate the dropdown list. Select **Columns** to activate the dropdown list, and choose the columns you want shown in the message view.

21 Sort Ascending		
X Sort Descending		
Columns	2 0	Expande
NODS Demo is Provi	isio 🔽	From
» NODS Demo Provisio	onir 🖭	To
MD - Out Of Office	23	Sent
thinking like a custor	ner 🗸	Received
TS		100547065

#### Figure 2-6: Selecting column display

You have the choice of displaying the following columns:

- **Expander** Adds a + icon next to each message. Click the icon to expand the message to reveal its details. With this feature, you can expand two messages inline so as to compare their contents.
- From Displays who sent the message.
- To Displays to whom the message was sent
- Sent Displays when the message was sent.
- Received Displays when the message was received.

The **Subject** column cannot be removed from the message view. This is to ensure that at least one column remains in the message view so that data can actually be displayed.

٦

4		Previe	w.+				Quick search	Search • Preference
pa	23		F	rom	То	Subject	Sent	Received
	8	<b>A</b>	6 A	ndrea Kostyk	Sacha Veillette	Re: To piece together	08/26/	0 5:07 Ph 08/26/10 5:07 PM
	Pre	view		Properties				
	From	n:		Andrea Kosty	k			
	To:			Sacha Veilett	e			*
	Sen	t:		08/26/10 5:0	17 PM			
	Sub	ject:		Re: To piece	together			
	Atta	achmer	its:	D TEXT.htm	D MOJ gwa0819	2010 4 complet.pdf		
	Her	e's the o	omplet	e doc.				~
								2
	101	A 4	Sach	a ∨eilette	Andrea Kostyk	To piece together	08/26/	0 4:57 Ph 08/26/10 4:57 PM
	(and )	view		Properties	range controlarja	to prove together		
	From	n:		Sacha Veillett	e			
	To:			Andrea Kosty	k			*
	1.570	eived:		08/26/10 4:5				
		ject:		To piece tog				
		·				Date in the D	The second second	
	Atta	achmei	its:	DIEXLINU	LI MOJ QWa0819	2010 4.pdf D signature énoncé	e de projet.par	
	Heil	lo,						-
	1.466	e they a	e					
	rier							
	rier			the mental in coole	cement of a specific	one (page 11).		*
		one go	is into	trie many, in repair				
		one go	-	tin Houde	Andrea Kostyk	Re: Jackson	08/26/	0 3:49 PN 08/26/10 3:49 PM
E E			Jus		Andrea Kostyk Justin Houde	Re: Jackson Jackson		0 3.49 Ph. 08/26/10 3.49 PM 0 3.49 Ph. 08/26/10 3.49 PM

#### Figure 2-7: Column display

It is also possible to change the order in which the columns are displayed. To do so, simply click on the heading of the column you want to move, and hold the mouse button down. Drag the column heading to the spot to which you want to move it, and release the mouse button.

Subject	Receiv	ed	Sent	
Re: Training Room	Statusi205/18/	09 9 8 2 AM	05/18/09 9	02 AN
Re: Security 12th	Street 05/14/	Sent 0		27 Pt

Figure 2-8: Reordering columns

### 2.3.4 Selecting Page Size

By default, the number of messages displayed on each page in the message view is 20. It is, however, possible to change the number of messages displayed per page. To do so, click **Preferences > Page Size**, and select the number of messages you want shown on each page. You can choose do display 20, 50, 100, or 200 messages per page.

			Search · Preferences	•
		Re	💟 Highlight Search Terms	
ſ		20	Page Size	Þ
a		50	6/10 2:00 AM	ī
		100	25/10 2:01 AM	
3	1	200	25/10 2:00 AM	
ML		200	24/10 12:25 PM	

Figure 2-9: Page Size options

The bottom right-hand corner of the message view shows the range of messages currently being displayed, how many messages there are in all, which page of messages is being displayed, and the total number of pages. You also have the option of typing in the page number you want to view, navigating to the previous or next page, navigating to the first or last page of messages, or refreshing the current page view.

14.1	u.	Stephanie Greenshields	Team 7 - updated PVP	06/07/10 12:16 PM	Defrech
	6	Frederic Bourget	PM Team Meeting	01/21/10 4:54 PM	Refresh
				Displaying 401 - 500 of 1498 📲 🖣 Page	5 of 15 🕨 🕅

Figure 2-10: Page range and message range display

# 2.4 Performing Actions on Messages

Once you have populated the message view with the list of messages that you would like to view, it is possible for you to perform specific actions on the messages. Most simply, you can double-click a message to open it and view its contents in a separate dialog box.

To piece together.		
A A		
Preview	Properties	
From:	Sacha Veillette	
To:	Andrea Kostyk	×
Sent:	08/26/10 4:57 PM	
Subject:	To piece together	
Attachments:	D TEXT.htm D MOJ gwa08192010 4.pdf D signature énoncé d	e projet.pdf
Hello,		<u>^</u>
Here they are		
The one goes into	the many, in replacement of a specific one (page 11).	
Thanks.		
Cheers,		3

Figure 2-11: Opening a message

The **Preview** and **Properties** tabs are available. For more information about these tabs, see "Message View" on page 14. You can also choose to forward or print the selected message from this dialog box.

## 2.4.1 Forwarding Messages

To forward one or more selected messages, click the **Forward** icon in the top left-hand corner of the message view. The **Forward selected messages** dialog box opens. Enter the email address(es) of the person(s) to whom you are forwarding the message, and click **Forward**. Alternatively, you can double-click a message to open it, and click the **Forward** icon.

	Preview *			Quick sem	ch
	From		Subject		
	🔒 🗉 Sacha V	'eillette	To piece together		
1	🔒 🧃 Justin He	oude	Re: Jackson		
	🔒 🕴 Andres I		Jackson		
piece t	together-				
Previes	•	Properties			
Previt	Forward selecte	ed messages		×	
rom:	EForward <table-cell></table-cell>	Cancel			
0:	-				Ų
ent:	To:				
	Cc:				
ubjer	Subject:	Fwd: refer	ence messages		
Attack	Tahoma	× B /	⊻   A* ∧*   <u>A</u> • <sup>9</sup> 2•   ■ ■ ■   @   注 ⊟   Ø		
Trigge					
Trigge Job ID					
Start 1 End Til					
Proces					

Figure 2-12: Forwarding messages

## 2.4.2 Printing Messages

To print one or more selected message, click the **Print** icon in the top left-hand corner of the message view. A new tab in your web browser opens. The contents of the selected message, including the case to which it pertains, who the message is from, to whom it was sent, the date the message was sent, the message subject, a list of any file attachments, and the message body are printed in PDF format. The file can also be saved for future use. Alternatively, you can double-click a message to open it, and click the **Print** icon.

If several messages are selected for printing, all the selected messages will be printed to the same PDF file.

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		🟠 🔹 🖾 🗠 🖶 Bage
•   🖏   🛧 🔶 🔟	/ 1 💿 🖲 133% • 📻 🔛 Find •	
Case: undefin	ed Search	
_		
Recurr	ing Appointment	
From:	Ranjit Sarai	
To:	Alexander Velarde, Ranjit Sarai	
Date:	2010-01-26	
Time:	11:00 - 12:00	
Subject:	Recurring Appointment	
Place:	Phone Machine	
Recurring Apr	pointments on the 1st day of every month til December 20	010
Recurring App	on the for day of every month in December 2	010.
Ranjit		
i van nit		
,		

Figure 2-13: Printing messages

## 2.5 Calendar View

By default, the message view simply displays a list of archived items. However, if any calendar items such as appointments, notes and tasks are archived, you can use M+Analytics' calendar view to display these items in a calendar. To do so, click on the calendar folder located in the folder view.

Analytic	s   Messaging Arc
Search	8 +
Folder	
4 Archives	
Calendar	
Mailbox	
p 🛄 Trash	

#### Figure 2-14: Selecting calendar items

There are four modes in which calendar items may be viewed:

- Day view
- Week view
- Month view
- List view

By default, the Week calendar view is displayed.

## 2.5.1 Day View

To view calendar items on a specific day, click the Day calendar view icon at the top of the calendar view.

Folder	🙈 🚔 🛛 Preview 🔹 🧱 🛅 🛅	Quick search Preferences •
4 🗐 Data	Day calendar view Wednesday, April 07, 2010	30
D Cabinet		April 2010 - >
Calendar	10.00	S M T W T F S
Mailbox Trash	10:30	20 20 20 20 21 1 2 3
r 🔤 nasn	11:00 Month ca	lendar 7 0 10
	11:30	11 12 13 14 15 16 17
	1200	18 19 20 21 22 23 24
	12:30 🔔 Book Club-Delegated (Conference Room 1)	25 25 27 25 25 20 1
	13.00	2345678
Filter	13:30	Today
▲ Language	Review (Conference Room 2)           Hi           14:30           Hi           15:00           16:00           16:00           16:30           16:30           16:30           16:30           17:30           18:00           18:00           19:30           19:30           20:30           21:30           22:30	
March(23.53%)	22:30 23:00	
	23:30	

Figure 2-15: Day calendar view

The date that is currently being displayed is shown at the top of the calendar view. To navigate to the previous or next day, simply click the left and right arrow buttons on either side of the date.



#### Figure 2-16: Navigating to the previous or next day

To view items listed on a specific day, click the desired date link in the small month calendar located on the righthand side of the screen. Dates which are greyed out do not contain any calendar items, while those not greyed out have at least one calendar item.

To change the month, click the left and right arrow buttons on either side of the month and year. Alternatively, click the arrow to the right of the month and year, and choose the desired month and year from the dropdown menu. When you are done, click **OK** to close the dropdown menu. To display today's calendar items, click **Today**.

The double chevron button in the top right-hand corner of the month calendar can be used to toggle between hiding and showing the calendar in the calendar view.

## 2.5.2 Week View

To view calendar items for an entire week, click the Week calendar view icon at the top of the calendar view.

Folder	Preview •				Qui	ck search		Search • Preferences •
a 💽 Data	Sun 04/04/10	Mon Week calendar view P6/10	Wed 04/07/10	Thu 04/08/10	Fri 04/09/10	Sat 04/10/10	D	9
D Cabinet	07:30						-	4 April 2010 - 1
Mailbox	08:00						10	S M T W T F S
Þ 🦲 Trash	08:30						1	28 29 30 31 1 2 3
	09:00							4 5 6 7 8 8 1
	09:30							11 12 13 14 15 16 1
	10.00					A PM Team M		10 1 20 21 22 23 2
	10:30					This new time is to		7 28 27 28 29 30 1
iter	11:00					and they out it to	1	2 3 4 5 6 7 1
# Language	11:30							Today
English(94.12%)	12:00					/		
Not Defined(5.88%)	12:30		A Book Club-E			/		
# Item Type	13:00				Month c	alendar		
received(100%)	13:30				montre	arcinaar		
<ul> <li>Opened</li> <li>Yes(88.24%)</li> </ul>	14:00		A Review (Cor					
No(11.76%)	14:30		н,					
Read	15.00							
Ves(100%)	15:30							
Received Date	16.00							
<ul> <li>2010(100%)</li> <li>April(35.29%)</li> </ul>	16:30							
January(35.29%)	17:00							
March(23.53%)	17:30							
February(5.88%)	18:00							
Created Date	18:30							
· 2010(100%)	19.00							
April(35.29%)	19:30							
January(35.29%) March(23.53%)	20.00						-	
February(5.88%)	20:30							
	21:00							
	21.00						¥.	

#### Figure 2-17: Week calendar view

Each day in the week that is currently being displayed is shown at the top of the calendar view. To navigate to the previous or next week, simply click the left and right arrow buttons at either end of the week.

C	Sun 04/04/10	Mon 04/05/10	Tue 04/06/10	Wed 04/07/10	Thu 04/08/10	Fri 04/09/10	Sat 04/10/10	
	0							1.17

#### Figure 2-18: Navigating to the previous or next week

You can use the small month calendar on the right-hand side of the screen to view items listed during a different week within the same month. Simply click a date link in the desired week to view the entire week. Dates which are greyed out do not contain any calendar items, while those not greyed out have at least one calendar item. Only dates containing calendar items can be clicked.

To change the month, click the left and right arrow buttons on either side of the month and year. Alternatively, click the arrow to the right of the month and year, and choose the desired month and year from the dropdown menu. When you are done, click **OK** to close the dropdown menu. To display the week containing today's calendar items, click **Today**.

The double chevron button in the top right-hand corner of the month calendar can be used to toggle between hiding and showing the calendar in the calendar view.

## 2.5.3 Month View

To view calendar items for an entire month, click the Month calendar view icon at the top of the calendar view.

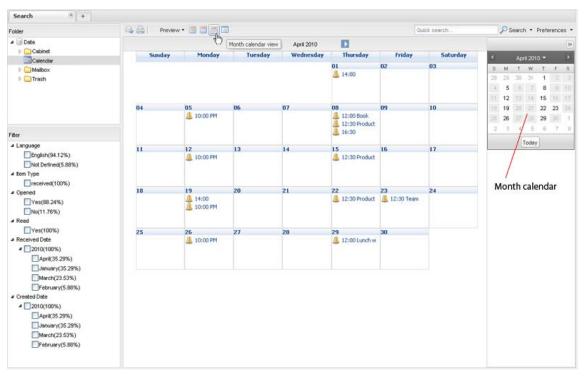


Figure 2-19: Month calendar view

The month and year currently being displayed are shown at the top of the calendar view. To navigate to the previous or next month, simply click the left and right arrow buttons on either side of the date. Alternatively, you can use the left and right arrow buttons on the small month calendar on the right-hand side of the screen to change the month.

April 2010

#### Figure 2-20: Navigating to the previous or next month

You can also use the small month calendar to view items listed in a different month and/or year. To do so, click the arrow to the right of the month and year, and choose the desired month and year from the dropdown menu. When you are done, click **OK** to close the dropdown menu. To display the month containing today's calendar items, click **Today**.

The double chevron button in the top right-hand corner of the month calendar can be used to toggle between hiding and showing the calendar in the calendar view.

## 2.5.4 List View

To view a list of all calendar items, click the Calendar list view icon at the top of the calendar view.

Folder	A 6		Pre	view • 🛅 🛅 🧾		Quick search	Search • Preferences
a 🗊 Doto				From	alendar list view		Received
Cabinet Calendar	13	ilin)	4	Frederic Bourget	Team Meeting		09/01/10 8:43 AM
Calendar	13	2		Richard Cabana	Richard will be off on Friday the 3rd of September		08/31/10 2:05 PM
Trash	13	3		Marco Jean	Re: OPUS discount! Its finally here!		
	5	11a	1	Frederic Bourget	Team Meeting		01/21/10 4:54 PM
	13	110		Michael Dybala	Big-time, Important Meeting		08/25/10 4:13 PM
		2	6	Michael Dybala	MD - Out Of Office		08/25/10 4:43 PM
	23	1111	8	Maximilian Morgan	ctavilog has edited a Web Meeting		08/18/10 4:19 PM
Ber	13	The		Frederic Bourget	Team Meeting		01/21/10 4:54 PM
riker ▲ Language	12	2		Michael Dybala	MD - Out Of Office		08/20/10 9:08 PM
English(100%)	123	1111		Suzanne Fondacaro	Quarterly Review & Wine & Cheese		06/11/10 3:00 PM
tem Type	13	2		Michael Dybala	MD - Working From Home		08/17/10 8:04 AM
received(100%)	13	illur,		Frederic Bourget	Team Meeting		01/21/10 4:54 PM
Opened	13	Tim	6	Debbie Howlett	CMS Training		08/12/10 11:32 AM
Yes(100%) Read	13	1111	4	Debbie Howlett	CMS training		08/10/10 9:42 AM
Ves(100%)	123	Tim		Debbie Howlett	quarterly review		08/05/10 3:41 PM
Created Date	13	Tim		Frederic Bourget	Team Meeting		01/21/10 4:54 PM
4 2010(100%)	8	110		Andrea Kostyk	M+Archive installation run-through		08/05/10 4:45 PM
August(50%)	2	110		Andrea Kostyk	M+Archive installation run-through		08/05/10 4:45 PM
September(25%)				Frederic Bourget	Team Meeting		01/21/10 4:54 PM
Ecceived Date	P3	110	8	Peter Barton	Policy kit discussion		07/29/10 4:33 PM
▲ 2010(100%) September(33.33%) August(33.33%) Jeruary(33.33%)							
	-						[4] 4 Page 1 of 6 ▶ ▶

Figure 2-21: Calendar list view

Like message view, list view displays a list of all archived calendar items in the Calendar folder.

## 2.5.5 Viewing Calendar Items

The default calendar view simply lists the calendar items located in your archive. However, you can also choose to preview individual items, regardless of whether you are in day view, week view, month view, or list view.

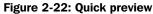
#### **Quick Preview**

To quickly preview a calendar item, simply hover your mouse over the item. A popup appears, showing the time, subject, location (if any), and part of the message body (if any) of the item.



The quick preview feature is not available in list view.





#### **Full Preview**

To fully preview a calendar item, click **Preview**, and select either **Bottom pane** or **Side pane** from the dropdown list. Like in the message view, **Bottom pane** displays the contents and properties of a selected item at the bottom of the screen, while **Side pane** displays the contents and properties of a selected item on the right side of

斗 🔔   🛛 Pre	wiew + 🔟 🛄 🛅 🕻					Quick search			P See	arch	• P	refer	nces
•	No preview	1	November 2010	D									
	Bottom pane y	Tuesday	Wednesday	Thursday	Friday	Saturday	^	3	No	vemb	ver 20	10	
	Side pane	02	03	04	05	06		S	м	T	W	Τ.,	F
	T							31	1	2		4	5
	12						-	34		9.1	10 17		12 1
07	08	09	10	11	12	13		23	22 3		24		
									29		1.	2	3
								5	6	7.	83	9:	1.0
14	15	16	17	18	19	20				Te	oday		
- Martine -													
Preview	Properties Ranjit Sarai												
From:		rde, Ranjit Sarai											
To:		C											Y
Sent:	10/26/09 10:4												
Received:	10/26/09 10:4	5 AM											
A CONTRACTOR OF													
Start:	11/01/10 11:0												
A CONTRACTOR OF	11/01/10 12:0												
Start: End:													
Start: End: Location:	11/01/10 12:0	O PM											
Start: End: Location: Subject:	11/01/10 12:0 Phone	0 PM bintment	scember 2010.										<
Start: End: Location: Subject:	11/01/10 12:0 Phone Recurring Appo	0 PM bintment	cember 2010.										(2)

#### the screen. To return to the basic calendar view, select No preview.

Figure 2-23: Calendar view, bottom pane view

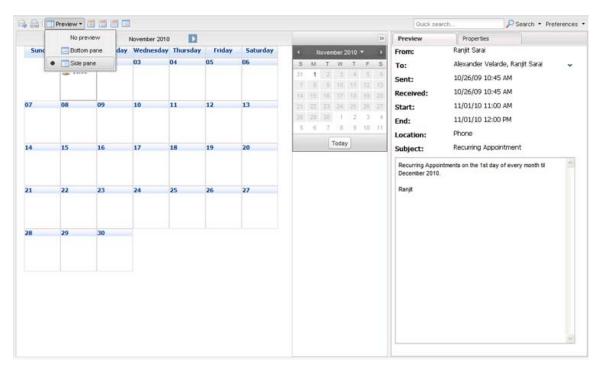


Figure 2-24: Calendar view, side pane view

#### **Full View**

To fully view the details of a specific calendar item, double-click the item to open it and view its contents in a separate dialog box. From here, you can forward the item and/or print the contents. For more information about forwarding items, see "Forwarding Messages" on page 18. For more information about printing items, see "Printing Messages" on page 19.

4	Previe	w• 🛅 🚍 🗂					Quick search	1	Search	<ul> <li>Pref</li> </ul>	ereno	ei
			K	November 201	0							
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday		Nover	ber 201		l
		01 11:00	02	03	04	05	06	\$ 31	м т 1 2	W	F S	
6	Recurring App	pintment						12	8 0	10 5	12	
	A A							14				
1	Preview	Propertie	5					25	22 32	1 2	1.1	
ľ	From:	Ranjit Sarai					~	5	6 7	8 1	10	
	To:	Alexander	Velarde, Ranjit S			6	Today					
	Sent:	10/26/09	10:45 AM		-				Ì			
	Received:	10/26/09										
	Start:	11/01/10	*									
٢	End:	11/01/10										
FI	Location:	Phone										
T	Subject:	Recurring A					Y	,				
R	Recurring App	ointments on the 1s	t day of every mor	th til December 2010.			~					
s	Ranjit											
E							and the second s					
	bject:	Recurring Appo	intment									
Ju	oject.		51000005									į

Figure 2-25: Calendar view, full view

# 3 Filters and Advanced Searching

M+Analytics has an advanced set of filters and search options that make it easy for you to locate the precise information you are looking for.

## 3.1 Filters

The search pane on the left-hand side of the archive overview screen lets you apply filters to your archived items.

	Analytics   Messaging Architects										
-	Search +										
Search	Folder	20		Pre	evie .						
Search pane	Archives	5			Fr						
		23		6	s						
	-	- 23	8	ü	JI,						
	Filter	171	6	ú	A						
	A Transmission	275	0	10							

Figure 3-1: Search pane

## 3.1.1 Conducting Multiple Filtered Searches

By default, one search pane is open in the main archive overview. With M+Analytics, you can open additional search panes to run multiple searches with different filters applied to each search.

#### **Adding Searches**

To open an additional search pane, click the + sign to the right of the Search tab.



Figure 3-2: Adding a Search tab

#### **Renaming Searches**

It is possible to rename the **Search** tabs to distinguish different searches from one another. To rename a **Search** tab, simply right-click on it, and choose **Rename** from the dropdown list. When prompted, enter the new title you want to give the search, and click **OK**.

Search January		1			
Filter	Close				
Archives	Close Other Tabs				
	Clone	tr			
	Rename	tr			

Figure 3-3: Renaming a Search tab

#### **Cloning Searches**

It is also possible to replicate the results of an existing search in a new search pane. To do so, left-click on the search tab you want to replicate, and choose **Clone** from the dropdown list. A new search pane opens, displaying the same search results as those of the search you have just replicated. The name of the search you have just replicated, however, is not carried over to the new search tab. You will have to rename your new search accordingly.

Search January					
Filter	Close				
Archives	Close Other Tabs				
	Clone				
	Rename				

Figure 3-4: Cloning a search

#### **Deleting Searches**

To delete a search, simply click the **x** in the top right-hand corner of its **Search** tab. Alternatively, right-click on the **Search** tab of the search you want to delete, and select **Close** from the dropdown list. If you want to keep only one of your searches and delete all others, right-click on the **Search** tab of the search you wish to keep to activate the dropdown list, and select **Close Other Tabs**.

Search January	
Filter	Close
Archives	Close Other Tabs
	Clone t
	Rename t

Figure 3-5: Deleting a search

## 3.1.2 Filtering by Archive Folder

Under **Folder**, you are shown a list of folders located in your archive. A quick and easy way to filter your data is to select an individual folder rather than your entire archive store. A folder containing subfolders can be expanded, and you can narrow your search further by selecting a subfolder.

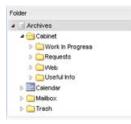


Figure 3-6: Folder filter

### 3.1.3 Using Filters

M+Analytics offers multiple filters that allow you to quickly sort through data and find the information you need. These filters are available only when an archive store is selected, not when individual folders within the archive store are selected. Place a checkmark next to the filter component(s) you want to enable. The values in parentheses next to the filter components indicate the percentage of items found in each respective filter component. The following filters are available:

- Language Allows you to filter by the language in which the archived message is written. The list of language filters varies according to the languages identified in the archived messages. Messages for which a specific language has not been identified fall into the Not Defined filter.
- Item Type Allows you to filter based on whether the message was received, sent, is personal, or a draft.
- **Opened** Allows you to filter based on whether or not the archived message was ever opened.
- Read Allows you to filter based on whether or not the archived message was ever read.
- **Created Date** Allows you to filter by the date on which a message was created. This filter displays the available years, followed by the available months of data.
- **Received Date** Allows you to filter by the date on which a message was received. This filter displays the available years, followed by the available months of data.

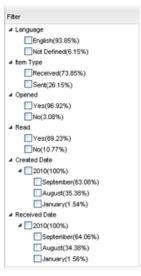


Figure 3-7: Filters

## 3.2 Advanced Searching

M+Analytics allows you to perform keyword searches as well as advanced searches on messages and attachments. Advanced searching allows you to apply various search criteria to help you narrow down your search and cull through your data quickly and efficiently.

#### 3.2.1 Keyword Search

The right-hand side of the main case overview features a **Quick search** box. This search box allows you to search for a specific keyword in the data listed in your message view. Simply type your keyword(s) in the available textbox, and click **Search**.

If you enter several keywords in the Quick search box, such as:

needs deleted purged

M+Analytics will search for archived items containing all three keywords somewhere within the message header and/or body contents (i.e., a Boolean AND operation applied to all three search terms).

If you enter the same three keywords in the **Quick search** box, but enclose them in double quotation marks, like this:

"needs deleted purged"

M+Analytics will search for archived items that contain that exact expression enclosed in the quotation marks.



Each time you enter a keyword and click **Search**, a new search that includes your entire data set takes place. In other words, the narrowed down data set from one keyword search is not carried over to the next keyword search. To further narrow down your data set, use the available filters. For more information on using filters, see "Filters" on page 27.

Analytics   Messaging	Archite	cts							andrea •
Search +									
Folder	101	91	Previ	iew -		Guick sear	ch	Psearch • Prefe	erences •
> 🕞 Archives				From	Subject	/	F	Received	
	123	8	8	Sacha Veillette	To piece together	Search box	0	18/26/10 4:57 PM	^
	1000	0		Justin Houde	Re: Jackson	Search Box		18/26/10 3:49 PM	

Figure 3-8: Search box

### 3.2.2 Message Search

A message search allows you to apply advanced search criteria to your archived messages. To perform a message search, click the arrow to the right of the **Search** button, and select **Messages** from the dropdown list.

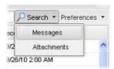


Figure 3-9: Search > Messages

The **Advanced Search** dialog box opens, displaying two tabs: **Message** and **Analytics**. The **Message** tab is displayed by default.

#### Message Tab

The Message tab lets you apply one or several of the following search criteria:

- Subject contains Allows you to search for a specific name appearing in the Subject field of a message.
- Sender contains Allows you to search for a specific name appearing in the From field of a message.
- **Recipients contains** Allows you to search for a specific name appearing in the **To**, **CC**, and **BC** (or **BCC**) fields of a message.
- Body contains Allows you to search for a specific word within the body of a message.
- Sent date range Allows you to search for messages that were sent during a specific date range.
- Received date range Allows you to search for messages that were received during a specific date range.
- Item types Allows you to search for specific items, namely mail, appointments, tasks, and notes.
- Search embedded messages also Allows you to also apply the above search criteria to messages embedded within other messages (i.e., message threads). Note that it may take a few moments for search results to appear.

When multiple search criteria are entered on the **Message** tab, a Boolean AND operation is applied to the criteria. For example, suppose you specify the following criteria:

Subject contains: doctor Sender contains: Alex Body contains: today

M+Analytics will search for messages containing the word "doctor" in the subject line, sent by a sender with the name "Alex", and having the word "today" appearing at least once in the message body.

Once you have entered your search criteria, click Search to apply them to your archived messages.

Advanced Search				100000000000000000000000000000000000000
Message Analytics				
Subject contains				
Sender contains				
Recipients contains				
Body contains				
Sent date range		30	13	
Received date range			13	
Item types	Mall	Appointment	🛄 Task	[] Note
Search embedded messages also				
		Search Cancel		

Figure 3-10: Advanced Search, Message tab



The **Recipients contains** field will search for the specified recipient(s) in the **To**, **CC**, and **BC** or **BCC** fields of messages. Boolean OR operators and parentheses can be used within the **Sender contains** and **Recipient contains** fields to search for multiple recipient names. For example, if you enter (Peter OR Paul OR John) in the **Sender contains** field, M+Analytics will search for messages with at least one of the three names appearing in the **From** field.

#### **Analytics Tab**

The Analytics tab allows you to build custom search queries with the following attributes:

- Exact phrase Allows you to search for messages containing a specific phrase or expression.
- Forbidden terms Allows you to search for messages containing specific terms you deem as forbidden.
- Words starting with Allows you to search for messages containing words that start with a specific root. For example, if you enter "teminat" all words beginning with that root will be included in your search results, such as terminate, terminating, terminated, etc.
- **Phonetic spelling** Allows you to search for messages containing words that are spelled the way they sound. For example, if you enter "ther" all words that sound the same when spoken will be included in your search results, such as there, they're, their, etc.
- **Approximate spelling** Allows you to search for messages containing words that have similar spelling to the word you have specified.
- **Proximity search** Allows you to search for messages containing words that are within a specific number of words from one another.
- **Regular expression** Allows you to search for messages containing words that meet the criteria of a regular expression. For example, ".at" matches any three-character string ending with "at", such as "cat", "hat", and "mat".

With the **Analytics** tab, you can make your search queries as detailed as you want. To build a custom search query, select an attribute, enter a word or expression you want to include in your query, and click **Apply**. Use the **AND** and **OR** Boolean operators to add more attributes to your query. Once you are satisfied with the criteria of your custom search, click **Search** to apply the criteria to your archived messages.

Advanced S	Search		3					
Message	Analytics							
Exact phase	•							
Forbidden 1	ferms	s left omize						
Words start	ting with	your query						
Phonetic sp	eling							
Approximat	e speling							
Proximity se	earch							
Regular exp	pression							
		Apply OR AND						
		Diff Solite						
		cel						

Figure 3-11: Advanced Search, Analytics tab



An advanced message search can involve only one search tab at a time. For example, assume you enter search criteria on the **Analytics** tab. If you then click the **Message** tab, enter additional search criteria on that tab, and click **Search**, only the criteria specified in the **Message** tab (the active tab) will be applied to the search.

## 3.2.3 Attachment Search

An attachment search allows you to apply advanced search criteria to attachments found in your archived messages. To perform an attachment search, click the arrow to the right of the **Search** button, and select **Attachments** from the dropdown list.

	Search -	Preferences +
Reco	Message	6
39/2	Attachm	ents 🧖
19/2	6/10 2:00 AM	- P

Figure 3-12: Searching for Attachments

The Advanced Search dialog box opens, displaying the Attachment tab.

#### **Attachment Tab**

The Attachment tab lets you apply one or several of the following search criteria to your archived attachments:

- Filename contains Allows you to search for attachments with a file name containing a specific word(s).
- **File size range** Allows you to search for attachments with a file size that falls within a specified size range. The file sizes must be entered in bytes.
- **Body contains** Allows you to search for attachments that have a specific word found within the attachment body. You can also choose to specify whether that word is within proximity to another word and/or whether M+Analytics should search for attachments containing words that sound like the specified word.

Once you have entered your search criteria, click Search to apply them to your archived attachments.

dvanced Search		7.2789181
Attachment		
Filename contains		
File size range	•	
Body contains		
	Next to within	words
	Phonetic spelling	
	TTL Long done interes ut	
	Search Clear Cancel	

Figure 3-13: Advanced Search, Attachment tab

When you obtain the results from an attachment search, the message view displays a list of attachments that have been found rather than a list of messages. As such, a different set of columns are available.

By default, the **File name**, **Size**, **Received**, and **From** columns are shown. You can also choose to show the **Expander** column or hide the **Size**, **Received**, and/or **From** columns. To do so, position your mouse over any column heading, click the arrow to activate the dropdown list, and select **Columns**. From the dropdown list, choose the columns you want displayed in the message view.

<ul> <li>Size</li> </ul>	Received
Sort Ascending	05/06/09 3:57 PM
Columns 🕨	Expander
1.5 KB	Size
1.5 KB	Received
1.8 KB	From
1.7 KB	03/18/09 10 38 AM

Figure 3-14: Selecting column display

The **File name** column cannot be removed from the message view. This is to ensure that at least one column remains in the message view so that data can actually be displayed.

## 3.3 Viewing Search Results

When you conduct a keyword or advanced message search, you can use M+Analytics' highlighting tool to help you quickly locate your search terms in your search results. When enabled, this tool highlights your search terms in yellow in the list of search results and in the messages themselves.

		From		Subject	Receiv	ved	
1		Frederic Bour	raet	PM Team Meeting	01/21/	10 4:54 PM	9
-	8	Cottage		Re: Booking (Cottage Booking - Accepted)	07/19/	10211 PM	
	0	5 tips		Ra. AK BULKING (Cattage Backing - Accepted)		I X I	
3		A A					
3	8	Preview	Proper	ies			
1	8	From:	Pierre Ch	Contract Inc.		,	
1	111	C. C					
3	111	To:		tebise, Alex Ash, Alex Mone, Alister gardner, Amani S	sharma, Andrea Kostyk, Andreas R	· ,	
3	8	Received:	06/04/10	3:37 AM			
3	8	Subject:	5 tips				
3		5. Saying "No" ci			N 1992 N 1997 N	A 1	
1	I		When trying to impress a buyer, it's easy to try too hard. We've all done it, but it's crucial to be yourself. If you disagree with something he or she says, tactfully push back and challenge them. Authentic candor has elevated many sales people from yes-(wo)man status who don't get the business to peer status who get the "yes" simply by serving as counsel a buyer can trust				
3							
3		Trigger Tip: Don'		nthused or eager right away. Think about how turned off yo			
	0	Impress you with glib, cheesey-speak. You want to run the other way. Be genuine and be honest at all times. High-level clents are usually a tougher sale. They require an eclectic approach of preparation, self-talk and smart behaviors. But					
3	8	the common ground is when you are able to make that connection and get the right answer from the person in charge that yes, means yes!					
3	111	Joe Takash, a be		t is the author of the newly released "Results Through Relati		3	
1	8	management firm	m Victory Consul	rell as a sought-after media resource and keynote speaker. A ting, Joe has worked with clients like American Express, Prud	as the rounder of performance ential, Century 21 and General		
3		Motors. Results	Through Relatio	nships can be ordered through any major bookseller.			
3	In						
3	8						
3	8	Bick Cluck		Re: Fwd: manual	05/11/	10 3:40 PM	
3	il te	Frederic Bourg	get	Meeting	01/21/	10 4:54 PM	
	-	Andrea Kostyk	k .	Re: Fwd: manual	05/07/	10 5:00 PM	
1	-		t	Book Club	10000	10 10:13 AM	

Figure 3-15: Highlighted search results

By default, the highlighting tool is enabled. To disable it, click Preferences > Highlight Search Terms to remove the checkmark.

	P	Search .	Preferences	•
Rece		Highlight S	earch Terms	
00.00		Danie Sire		

#### Figure 3-16: Highlighting tool



M+Analytics' highlighting tool does not apply to attachment searches, meaning search terms are not highlighted in yellow in the search results.

# 3.4 Logging Out

To log out of M+Analytics, click the arrow next to your user name in the top right-hand corner of the archive overview screen, and click **Log out**.



Figure 3-17: Logging out

# Index

# Α

Accessing M+Analytics	
Through a URL Link	7
Through GroupWise WebAccess and WebViewer	7
Through Outlook Web Access	9
Through the Outlook Client	8
Advanced Searching	
Keyword Search	.29
Message Search	.30
Archive Overview	
Calendar View	.20
Filter View	.13
Folder View	.13
Message View	
Performing Actions on Messages	

# С

Calendar View	
Day View	21
List View	24
Month View	23
Viewing Calendar Items	24
Week View	22
Conducting Multiple Filtered Searches	
Adding Searches	
Cloning Searches	27
Deleteing Searches	
Renaming Searches	27
Customizing M+Analytics	
Applying Themes	11
Changing Languages	

## F

Filter and Search Options	
Viewing Search Results33	3
Filters	
Conducting Multiple Filtered Searches27	7
Filtering by Archive Folder28	3
Using28	3
Filters and Advanced Searching	
Advanced Searching29	9
Filters27	7

# Μ

M+Analytics	
Aboutv	i
Accessing	7

Customizing	10
Introducing	7
Logging Out	34
M+Analytics User Guide	
About	vi
Style Conventions	vi
Symbols	vi
M+Archive	
About	2, vi
Message View	
Displaying Columns	
Previewing Messages	14
Selecting Page Size	
Sorting Messages	

## Ρ

Performing Actions on Messages	
Forwarding	18
Printing	19

# S

Search Options	
Attachment Search	

# V

24
26
24

# **Your Notes**