

Enterprise Vault 12.1

Feature Briefing

Enterprise Vault Search Enhancements

This document is about the enhancements in Enterprise Vault Search for Enterprise Vault 12.1.

This document applies to the following version(s) of Enterprise Vault: **12.1**.

If you have any feedback or questions about this document please email them to IL-TEC@veritas.com stating the document title.

Feature Description

Enterprise Vault 11 introduced a replacement for Archive Explorer, Browser Search, and Integrated Search (Outlook clients) called Enterprise Vault Search (EVS). This web-based search provided a more powerful and modern way to search for archived content across all content types (email, files, SharePoint, etc.). EVS also enhanced searching capabilities across multiple devices such as PCs, Macs, mobile devices, and tablets. Support for various major web browsers (Internet Explorer, Safari, Chrome, and Firefox) was also introduced.

Starting with Enterprise Vault 12, customers automatically had their environments enabled to use EVS. The old search applications were no longer available.

The main enhancements for Enterprise Vault 12.1 and EVS are aimed at enhancing the user interface (UI) and supporting features introduced in 12.x. There are additional administrative changes that support the new features, as outlined later in this document.

Business Value

For Enterprise Vault 12.1, UI enhancements for EVS include:

- Font icons: Improves accessibility and performance
- Reading pane toolbar: Easier access to commonly performed actions
- Support for native Outlook Web App/Office Mail App format: Archived items are opened in native format, rather than .msg format, allowing users to **Reply** and **Forward** without requiring a local version of Outlook
- **Advanced Search** options supporting:
 - Classification (**Tags**): Introduced in Enterprise Vault 12.0
 - Records management (**Record Type**, **Record ID**): Introduced in Enterprise Vault 12.1
 - Outlook categories

Underlying Principles

For Enterprise Vault 12.1, there are no changes for installation or the basic architecture.

Search Policy options are added to provide administrative control of user access to the new **Advanced Search** fields and displays. The new **Search Policy > Advanced Search** tab is illustrated in Figure 1.

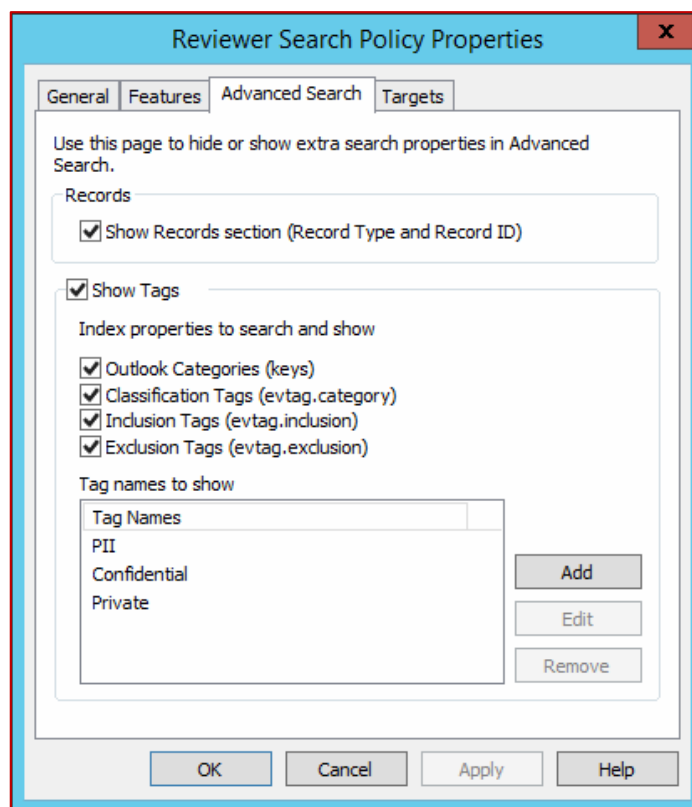


Figure 1 – Search Policy configuration: Advanced Search tab

The following architectural changes have been made to Enterprise Vault 12.1 to support Outlook Web Access (OWA) and Outlook Mail App (OMA) EVS archive item retrieval:

- The functionality is supported by restoring an item to a user's **Deleted Items** folder.
- The item's ID is accessed using the Exchange Managed Web Services API.
- Once the item ID is retrieved, the response is redirected to an OWA supported URL for the item to open in native OWA format.

The basic flow for Office Mail App 2013/2016 is outlined in Figure 2.

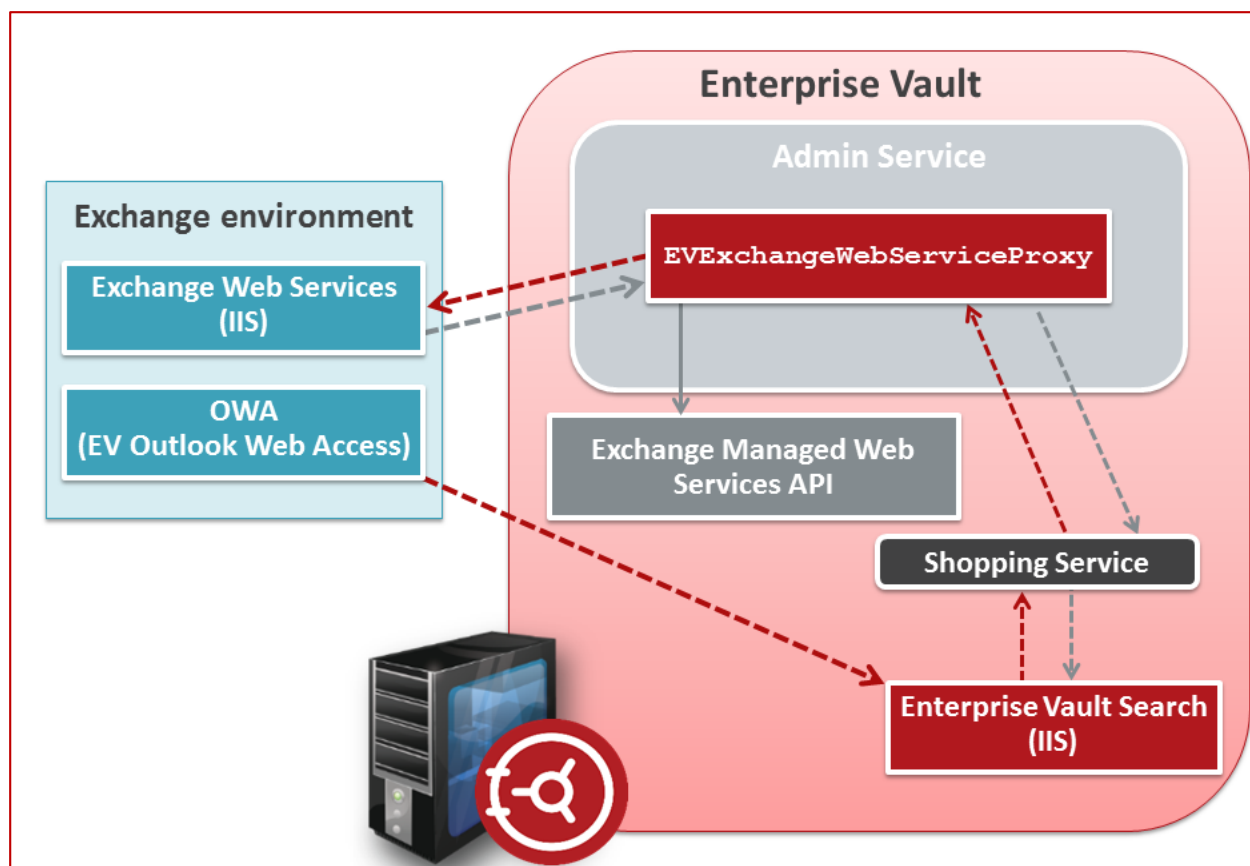


Figure 2 – Support from OMA 2013/2016

Guided Tour

This section provides an overview of some of the enhancements for Enterprise Vault Search in 12.1.

Font icons

In Enterprise Vault 12.1, all images and icons used in Enterprise Vault Search are now Font icons. Font icons improve accessibility, as they automatically scale with different devices. Their use also improves performance, as now all icons are fonts and are bundled in a single file.

All displays, menus, and submenus in EVS now use Font icons, except the **Quick Help** bar, displayed when a user clicks on the Enterprise Vault Search icon. An example of font icons is shown in Figure 3 .

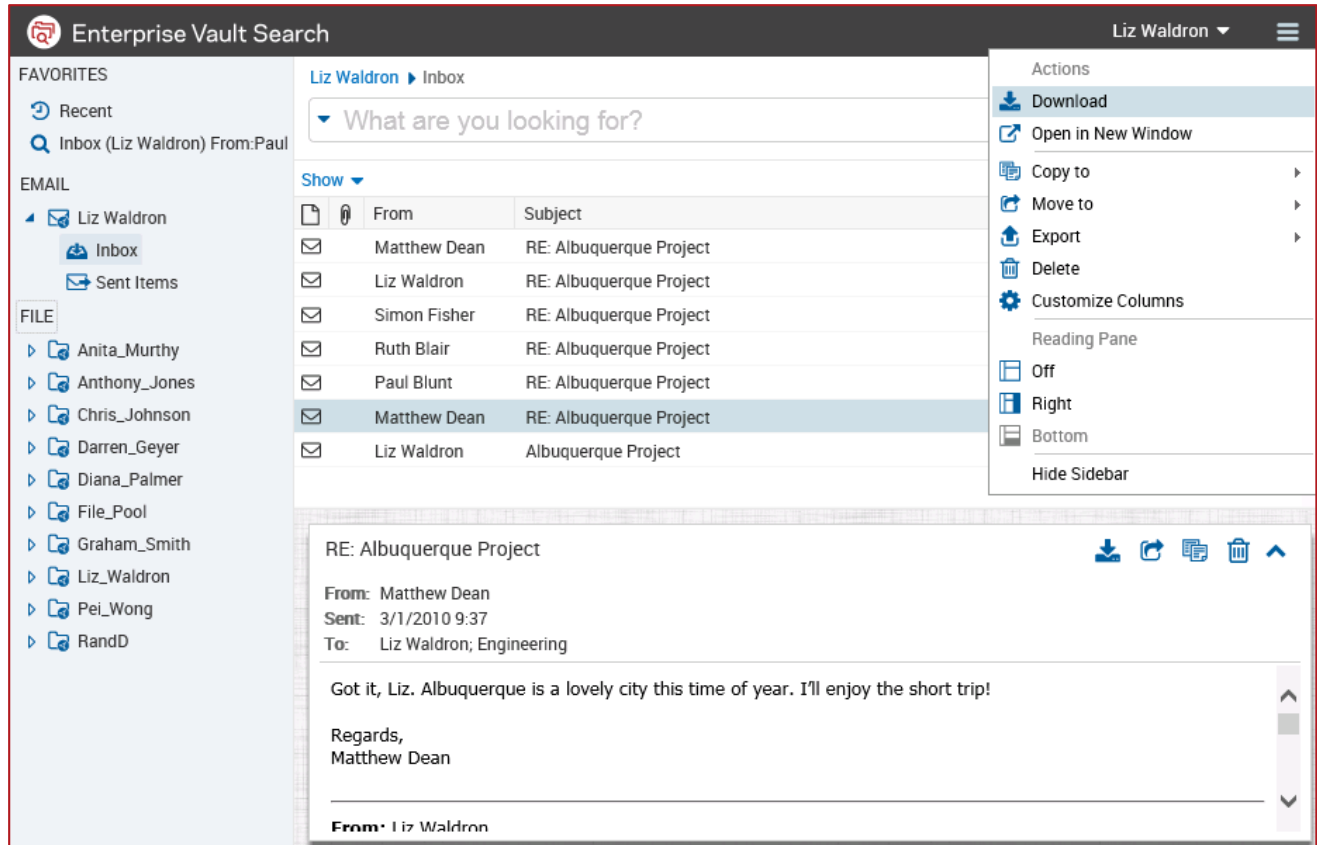






Figure 3 – Enterprise Vault Search 12.1 UI: Font icons

Reading pane toolbar

The new Reading pane allows users to quickly perform actions on any item selected in the Results Pane or opened with **Open in New window**. The toolbar is available on desktops and tablets and displays a quick actions toolbar that includes:

- Download 
- Move 
- Copy 
- Delete 

These options are displayed based on the priority of the menus for different content sources.

The toolbar is dynamic, based on the width available in the Reading Pane. If the window is small, the quick bar menu is reduced and the rest of the menu items hidden under a more link as shown on the slide.

Examples of the toolbar are shown in Figure 4, including the full and reduced versions.

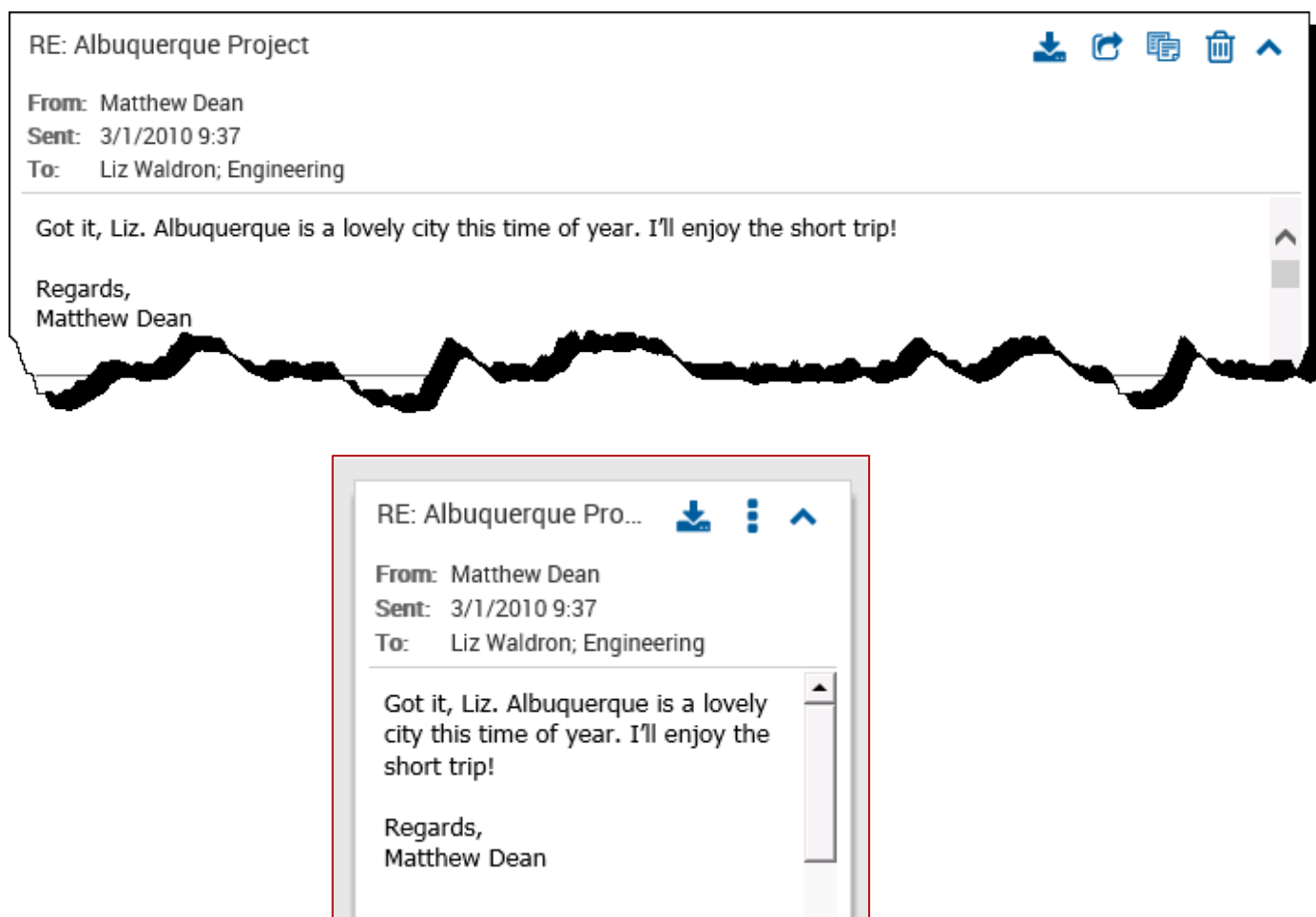


Figure 4 – Reading pane toolbar: Full and reduced

Support for native Outlook Web App/Office Mail App format

With Enterprise Vault Search 12.1, archived items are opened in native format, rather than .msg format. This functionality allows users to **Reply** and **Forward** archived items without requiring a local version of Outlook. The functionality is supported by restoring retrieved archived items to a user's **Deleted Items** folder and using the Exchange Managed Web Services API to display the item.

New Advanced Search options

If administrators configure the appropriate **Search Policy** options, users can search based on Classification and Records Management.

User options: Search

If the user is enabled in the policy they can search on the following Records management options:

- **Record ID** (Index property: `rcid`)
- **Record Type** (Index property: `recordtype`) The values the user can select include:
 - **Permanent**
 - **Temporary**
 - **All Record Types**

These options are available in the drop-down menus available from the **Advanced Search** fields, as shown in Figure 5.

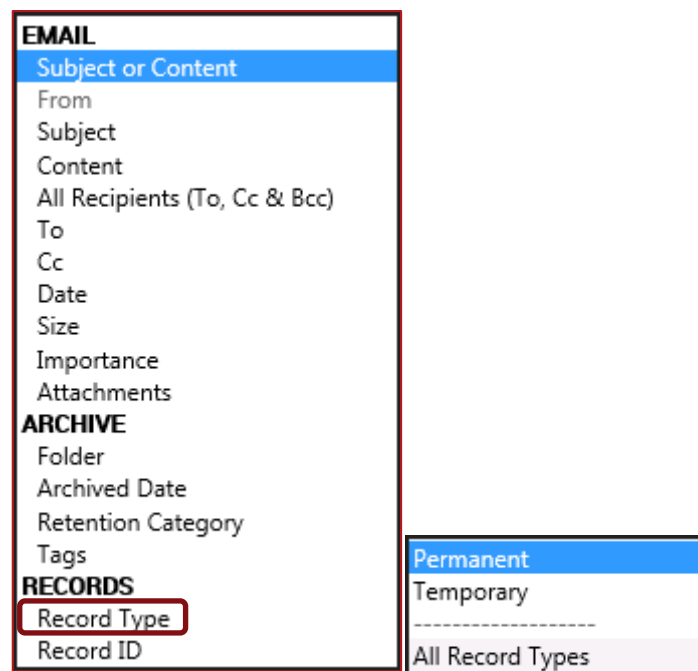


Figure 5 – Advanced Search: Records management options

Enabled users can also search on **Tags** used to classify items. The available **Tags** are limited to those defined in the user's associated **Search Policy**. An example of the Tags options can be seen in Figure 6.

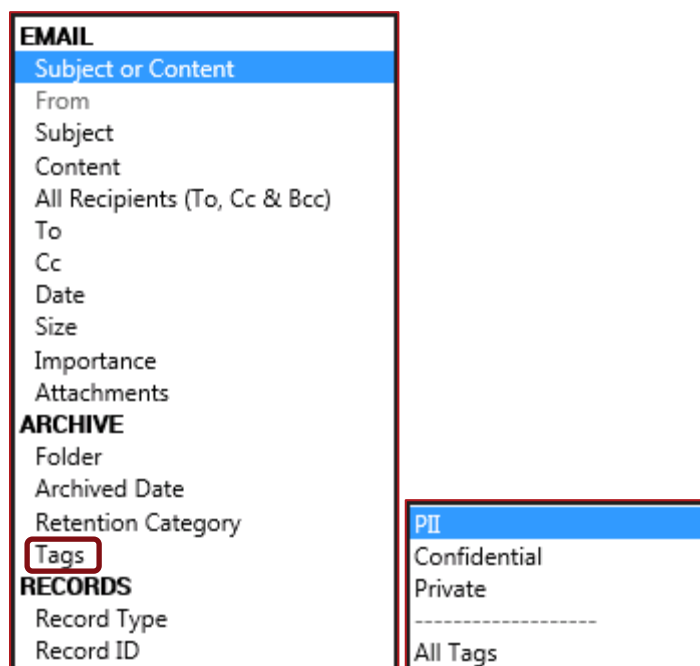


Figure 6 – Advanced Search: Classification options

User options: Column display

Also based on the Search Policy definitions, users can select to display columns now available based on the new Records management and Classification features as shown in Figure 7.

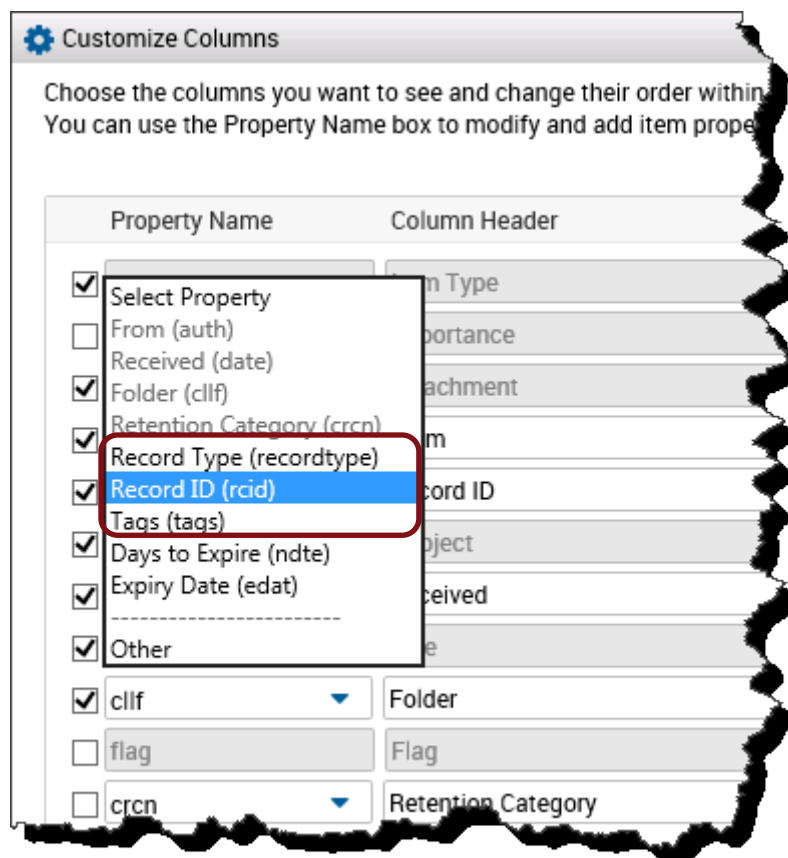


Figure 7 – Customizing columns

In addition, two are available for column display:

- Days to Expire (ndte)
- Expiry Date (edat)

Administrative control

The fields and tags available are those defined in the **Search Policy > Advanced Search** tab or defined when creating a new **Search Policy** as shown in Figure 8.

Administrators can select to allow users to view the following options in **Advanced Search** and **Customize Columns**:

- **Show Records section** to display the **Record Type** and **Record ID**
- **Show Tags** to display:
 - Outlook categories (keys)
 - Classification Tags (evtag.category)
 - Inclusion Tags (evtag.inclusion)
 - Exclusion Tags (evtag.exclusion)

New Search Policy

Select Policy settings

Use this page to hide or show extra search properties in Advanced Search.

Records

☒ Show Records section (Record Type and Record ID)

☒ Show Tags

Index properties to search and show

☒ Outlook Categories (keys)

☒ Classification Tags (evtag.category)

☒ Inclusion Tags (evtag.inclusion)

☒ Exclusion Tags (evtag.exclusion)

Tag names to show

| Tag Names | |
|--------------|--|
| PII | |
| Confidential | |
| Private | |

Add Edit Remove

Figure 8 – New Search Policy: Advanced Search definitions

When the administrator selects the appropriate tag properties, they can then define the specific tag names the user can select from. Only these tag names are displayed to the user.

Licensing and support considerations

Enterprise Vault Search is included with any valid Enterprise Vault license key. No additional license key is needed to enable EVS.

For best functionality with Enterprise Vault Search, a modern web browser that supports HTML 5 is recommended. Newer browsers will provide all functionality.

To support **Advanced Search** for the new Classification (**Tags**) and Records management (**Record Type**, **Record ID**) options, the Enterprise Vault **Retention** license is required.

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