global RELAY®

Global Relay Search for Outlook

Search Guide

Version 3.1
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Contents

Understanding Global Relay Search for Outlook

With Global Relay Search for Outlook, you can access Global Relay Archive from within Outlook or Outlook Web Access (OWA).

For administrative, eDiscovery, audit, compliance, flagging, and supervisory tasks, non-Standard Users must still use Global Relay Archive.

In the left navigation pane, you can access Global Relay Search for Outlook in the Global Relay folder. Once you log in, you can search for and view your archived messages.

24/7 Technical Support: 1.866.484.6630 / support@globalrelay.net / training@globalrelay.net
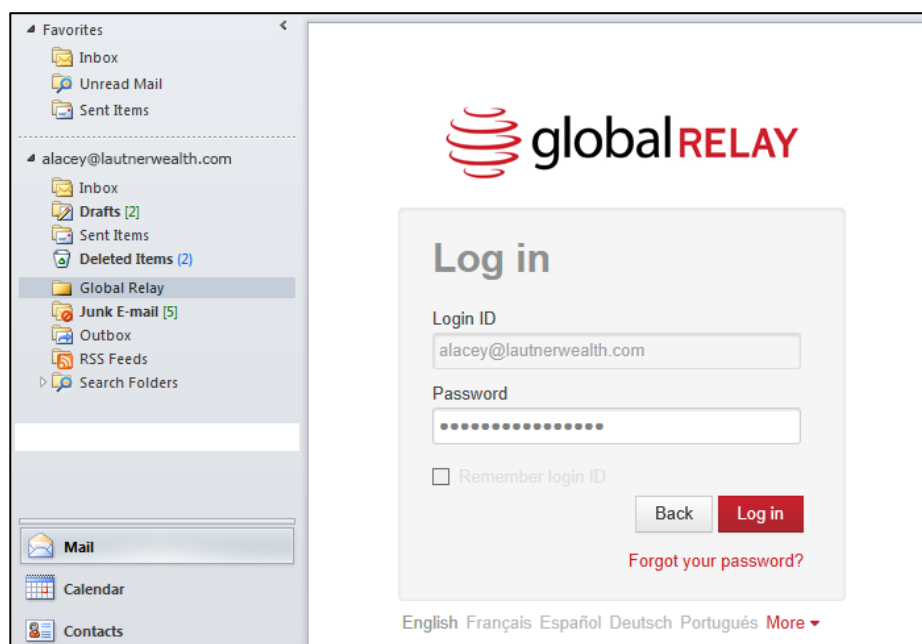
Launching Global Relay Search for Outlook

NOTE: You will remain logged into Global Relay Search for Outlook for 12 hours or until you log out.

To launch Global Relay Search for Outlook:

1. Log in to **Microsoft Outlook**.

2. In the left navigation pane under Mail Folders, click the **Global Relay** folder.
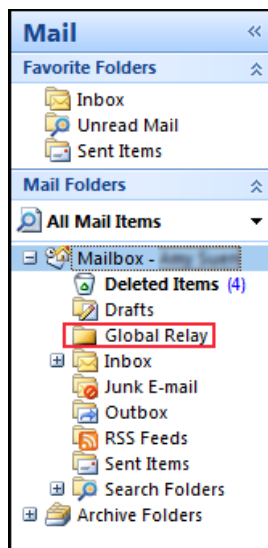
3. In the Login screen, enter your Global Relay Search email and password.

4. Click **Login**.
   The Global Relay Search interface displays.

Performing Quick Searches

A quick search returns results from the following areas: The **To**, **From**, **Subject** fields (message header), body text, and content within attachments. It covers all folders accessible by you.

You can also perform Boolean, Proximity, and Wildcard (except leading Wildcard) searches.

To perform more specific searches or to limit searches to specific folders, perform an advanced search.

To perform a quick search:

1. In the Search field, enter the following information:

    - Sender or recipient information

    - Text in the Subject line, message body, or in an attachment file.
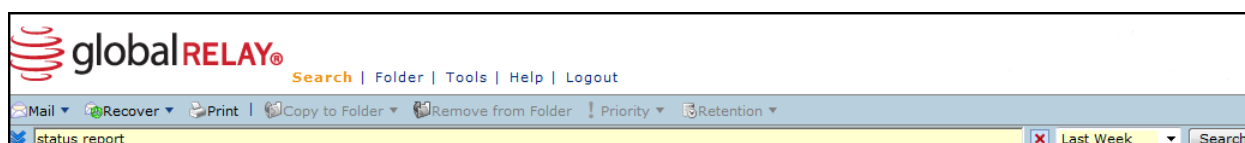
2. From the date drop-down menu, select a date range.
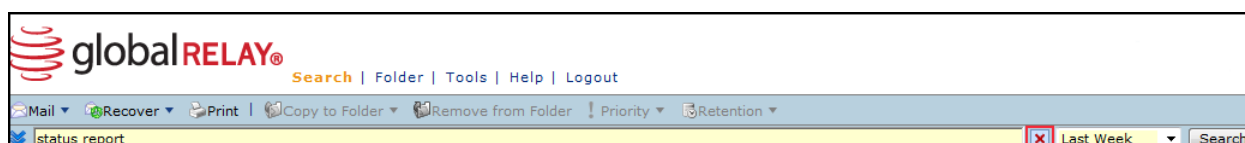
3. Click **Search**.

    Your results display in the middle pane of the window.

4. Perform an action with a message:

    - To preview a message, highlight it.

    - To display a message, double-click it.

    - To close a message, in the top right of the screen, click **Close**.

5. To clear your current search query, next to the Search field, click the clear icon: ☒.
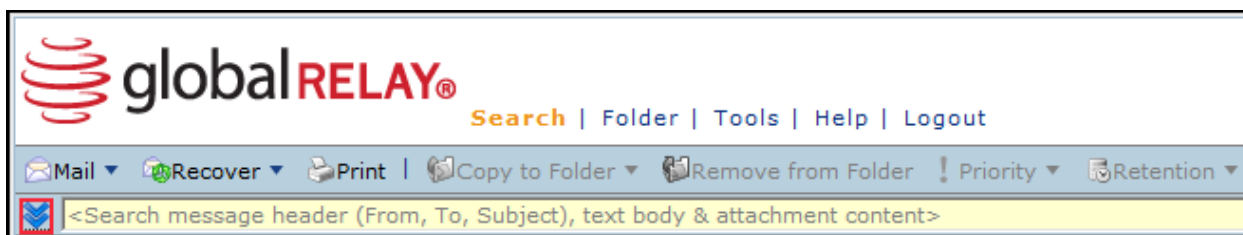
Performing Advanced Searches

Perform an advanced search to widen or narrow your results with more search filters. You can also perform Boolean, Proximity, and Wildcard (except leading Wildcard) searches.

To perform an advanced search:

1. In the top left corner beside the Quick Search field, click the **blue arrows**.

2. In the advanced search pane, set up your search criteria.

Criteria	Setup Procedures
From (include aliases)	To search for messages by sender, enter the sender's name or email address. Deselect the **(include aliases)** checkbox to exclude other email addresses associated with the sender.
AND/OR	Select **AND** to search for messages sent and received between the senders and recipients you set up in the From and To fields. Select **OR** to find all messages sent by the sender and all messages received by the receiver, including messages to or from other people.
To (include aliases)	To search for emails by recipient, enter the recipient's name or email address. Deselect the **(include aliases)** checkbox to exclude other email addresses associated with the recipient.

Criteria	Setup Procedures
Keywords	Enter any word or phrase you want to find in the body text, message header or attachments.
Start date	Click the **Start Date** field to display the calendar. To set the month/year and date, click the arrows. To set the hour and minute, click the scroll boxes.
End date	Click the **End Date** field to display the calendar. To set the month/year and date, click the arrows. To set the hour and minute, click the scroll boxes.
Folders	Select the folder within which you want to search.
Subject	Enter the word or phrase you want to find in the subject line.
Priority	Select the priority level as it is set in the Archive. The priority level set in Outlook does not apply as search criteria here.
Attachments	Select **All** to find any messages with attachments, or select a specific file type. To search by attachment name, select **Other** and enter the file name.
My Access Rights	If you have access to groups and/or mailboxes other than your own, select which mailboxes or groups you want to search. If you only have access to your own mailbox, this search control will not display.
Retention (optional)	If your organization has this functionality, you can search for messages by expiration timelines. From the drop-down menu, select the date range from the drop-down menu. You can find messages that are expiring soon and choose whether to extend the retention period.

3. To perform a search:

- Click **Search** to view your results.
- Click **Calculate** to get a number count of the search results.

Printing Messages

NOTE: You do not have to recover a message to print it.

The following information is printed:

- Subject line
- From
- Sender
- Date, in same format as it displays on the message
- To
- Cc
- Bcc/DL
- Attachments: File name with file extension and size. If the message has no attachments, this line is not printed.
- Message body, including any images that display in the Archive

To print a message:

1. Open the message you want to print.

2. Click **Print**.
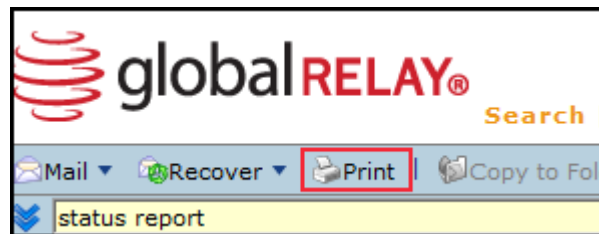
3. Follow the print dialog prompts.

Recovering Messages from the Archive

There are two ways you can recover messages from the Archive:
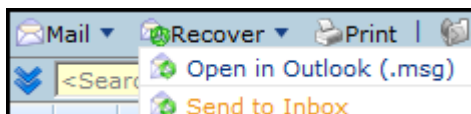
- Send a copy of the message to your inbox

- Open a copy in Outlook format (MSG), which you can save or re-import

Copying a Message to your Inbox

From the Archive, you can recover messages you deleted or misplaced.

To recover a message:

1. Click the message.

2. In the toolbar, click **Recover**.

3. In the submenu, select **Send to Inbox**.

4. In the confirmation dialog, click **OK**.

Opening an Archived Messaged in Outlook

Messages you find using Global Relay Search for Outlook can be opened in Outlook. When you open a message, it gets converted to Outlook's MSG format.

You do not have to recover a message to view it, and you can only open one message at a time.

Once you have opened a message, you can save it and retrieve it later.

To open an archived message in Outlook:

1. In the message's far right column, select its checkbox.
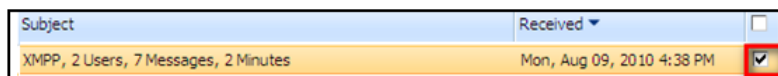
2. In the toolbar, click **Recover**.

3. In the submenu, select **Open in Outlook (.msg)**.

4. When prompted, make the appropriate selections to open the message.

Changing Your Preferences

You can change how Global Relay Search for Outlook displays information by adjusting your preferences.

NOTE: The type of preferences you can view or change depends on how your User Role is configured.

To change your preferences:

1. In the top menu, click **Tools**.

2. In the submenu, select **Preferences**.

3. Under User Settings, make desired changes to the following preferences:

   - **Password**

   - **Time Zone**

   - **Language**: The language of the interface text, not the language of the messages.

   - **Results per page**: The number of messages to display in the Results page

   - **Custom User Fields**: If your organization set up custom fields to capture additional data (e.g. employee number or birthday, etc.) and your role has editing rights, you can enter applicable information

4. Click **Update**.

Working with Global Relay Archive Folders

Use Folders to manage and tag messages in Global Relay Archive. Folders in Global Relay Archive do not correspond with folders in Outlook.
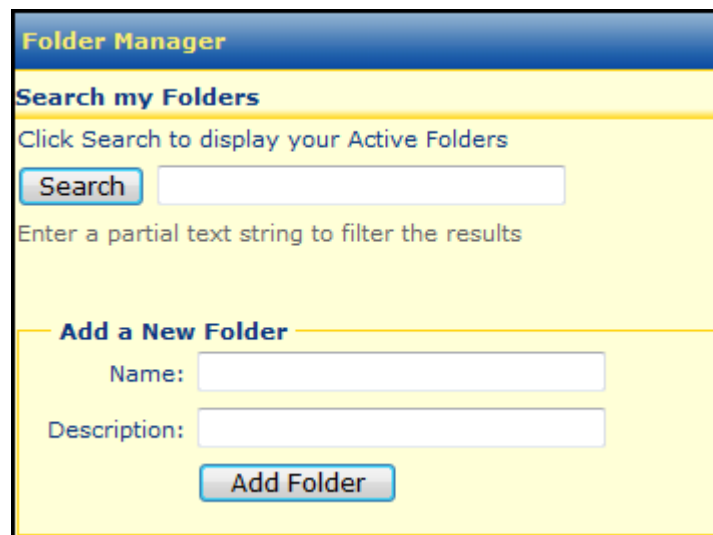
In Global Relay for Outlook, you can create Global Relay Archive folders as well as copy messages to or remove messages from them.

NOTE: Because your messages are archived within Global Relay Archive, catalog your messages with Global Relay Folders. Do not copy messages from your Outlook folders to the Global Relay Folder as the messages are already there.

Creating Folders

To create a folder:

1. In the top menu, click **Folders**.

2. In the submenu, select **Folder Manager**.

3. Under Add a New Folder, enter the name of your new Folder.

4. If necessary, in the Description field, enter a description for your Folder.

5. Click **Add Folder**.

Copying Messages to a Folder

You can copy individual messages, a page of messages, or all messages to a folder. To copy a message, you must select its checkbox, not highlight it.

1. To copy messages to a folder:

   - For individual messages: In each message's right column, select its checkbox.
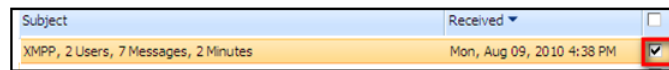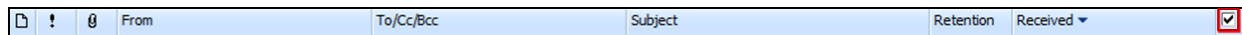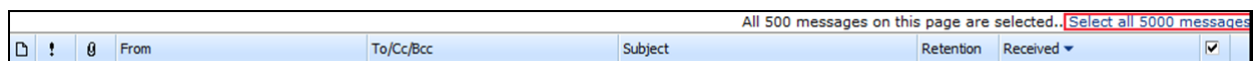
Subject	Received ▼	☐
XMPP, 2 Users, 7 Messages, 2 Minutes	Mon, Aug 09, 2010 4:38 PM	☑

   - For all messages on a page: At the top of the right column, select the checkbox.

🗋	!	📎	From	To/Cc/Bcc	Subject	Retention	Received ▼	☑

   - For all messages in the current folder: At the top of the right column, select the checkbox and then click **Select all (number) messages**.

						All 500 messages on this page are selected.. Select all 5000 messages

🗋	!	📎	From	To/Cc/Bcc	Subject	Retention	Received ▼	☑

2. In the toolbar, click **Copy to Folder**.

3. In the Copy to Folder submenu:

   - Select the folder where you want the selected messages copied.
     To create a new folder, in the Copy to new folder field, enter its name and press Enter on your keyboard. Messages will be copied to that new folder.

Removing Messages from Folders

You can remove individual messages, a page of messages, or all messages from a folder. Messages removed from folders remain in the Archive, where you can recover them.

To remove messages from a folder:

1. In the top menu, click **Folders**.

2. In the submenu, select the folder containing the messages you want to remove.

3. To remove messages:

   - For individual messages: In each message's far right column, select its checkbox.

   - For all messages on the page: Select the checkbox at the top of the far right column.

   - For all messages in the folder: Select the checkbox at the top of the far right column and then click **Select all (number) messages**.

4. In the toolbar, click **Remove from Folder**.

📧Mail ▼ 🔄Recover ▼ 🖨Print | 📁Copy to Folder ▼ 📁Remove from Folder ! Priority ▼ 📑Retention ▼

Assigning Priority

You can assign priorities to messages to catalog them and to manage your compliance process. Priorities in this context are specific to Global Relay Archive and are not the same as the priorities you assign to messages using Outlook.

1. To assign priority:

    - For individual messages: In each message's far right column, select its checkbox.

    - For all messages on the page: Select the checkbox at the top of the far right column.

    - For all messages in the folder: Select the checkbox at the top of the far right column and then click **Select all (number) messages**.
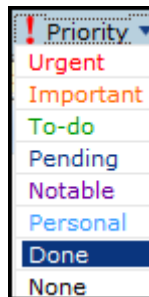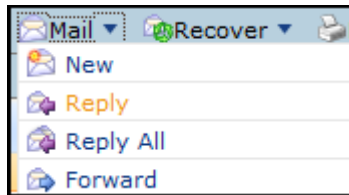
2. In the toolbar, click **Priority**.

3. In the submenu, select the priority level for selected messages.

Forwarding or Replying to Messages

Once you find messages in the Archive, you can forward them or reply to them.

To forward or reply to a message:

1. Highlight the message.

2. In the toolbar, click **Mail**.

3. In the submenu, select the action you are performing: **Reply**, **Reply All**, or **Forward**.
   The email editor displays.

4. Complete your message and then click **Send**.

Extending Message Retention

NOTE: Only some organizations have this functionality enabled.

Retention is the length of time a message remains accessible in the Archive from the day is was sent or received. If your organization set a default expiration date for messages in the Archive, you can overwrite this default for your own purposes.

To change message retention:

1. To change message retention:

   - For individual messages: In each message's far right column, select its checkbox.

   - For all messages on the page: Select the checkbox at the top of the far right column.

   - For all messages in the folder: Select the checkbox at the top of the far right column and then click **Select all (number) messages**.

2. In the toolbar, click **Retention**, and in the submenu, select how long you want the message archived from when you received or sent it.

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