



Enterprise Vault

Outlook Installation Guide – All Versions

Document Description: Enterprise Vault Client Installation Guide for all Outlook Users

For use by: All staff that have an Exchange Mailbox with Vault enabled who use Outlook


Quick Start

Index:

- 1) [Installing the EV Client](#) Page 1
- 2) [EV Default Settings](#) Page 4

1. Installing the EV Client

Before commencing this process please ensure that you are able to log onto the user's computer with an account that has local administrative privileges.

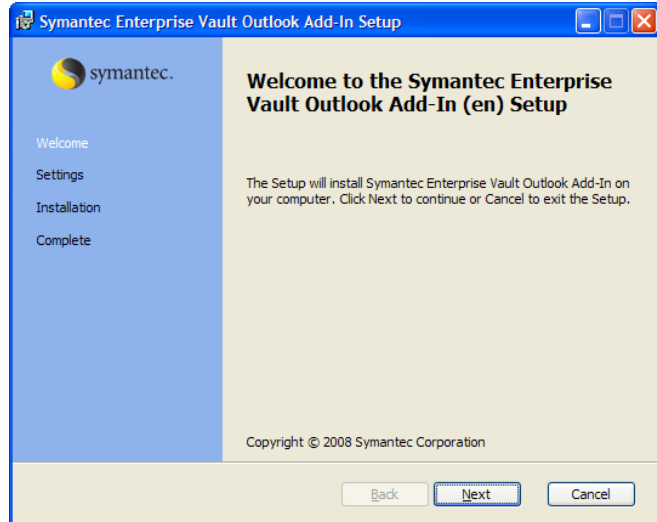
| Action/Outcome | Reference |
|---|---|
| Once you have downloaded the EV Client from IT Assist, please double-click to commence the installation process. NOTE: Please ensure that Outlook is closed before you start. |  |



The following screen will appear.

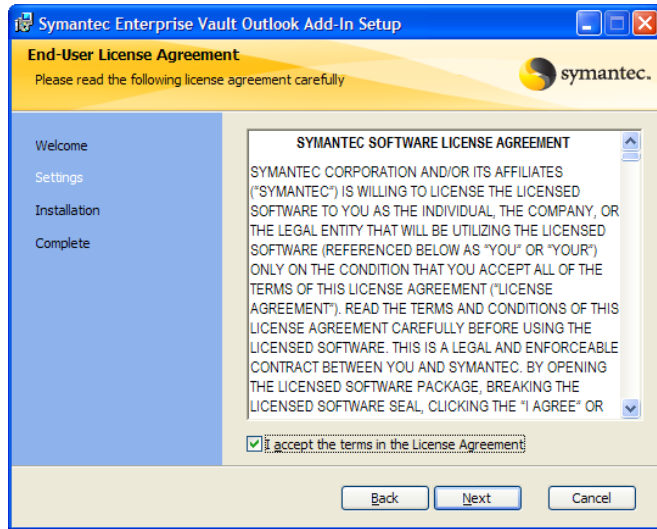
Click next to continue....

NOTE: If you receive any messages other than what is showing on the right please contact your CSO for assistance.



Select "I accept the terms in the License Agreement".

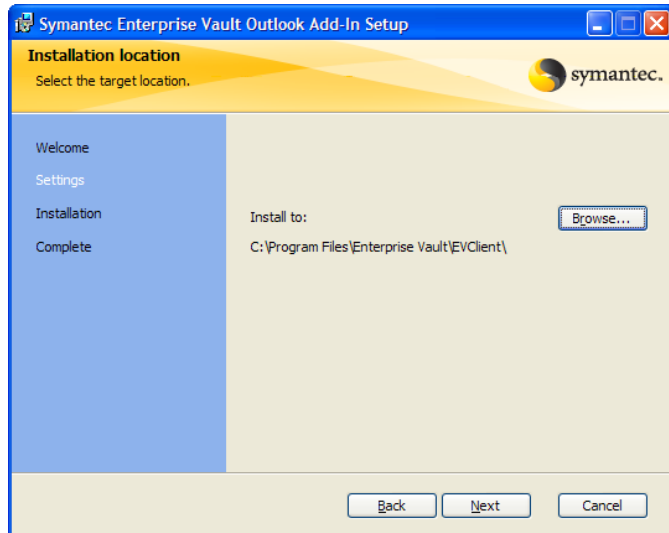
Now select Next....



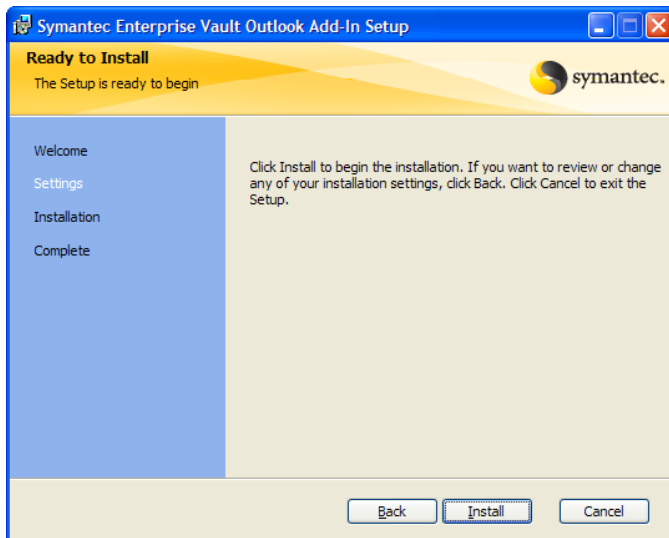


Leave the details as default from this point.

Now select Next....

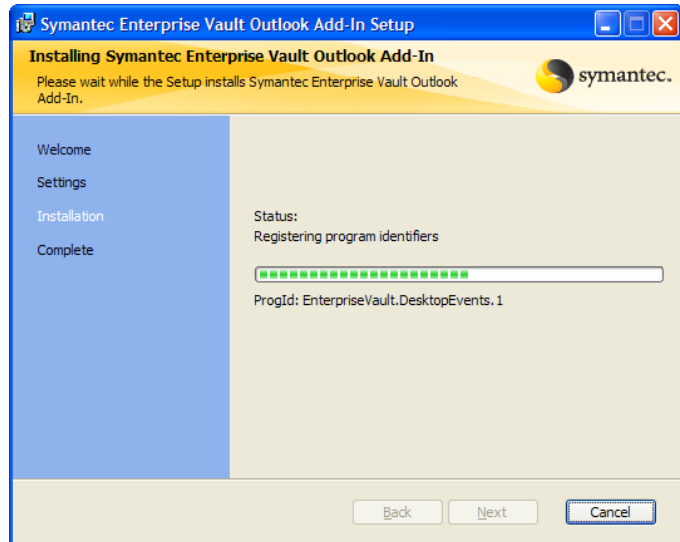


Now select install to continue....



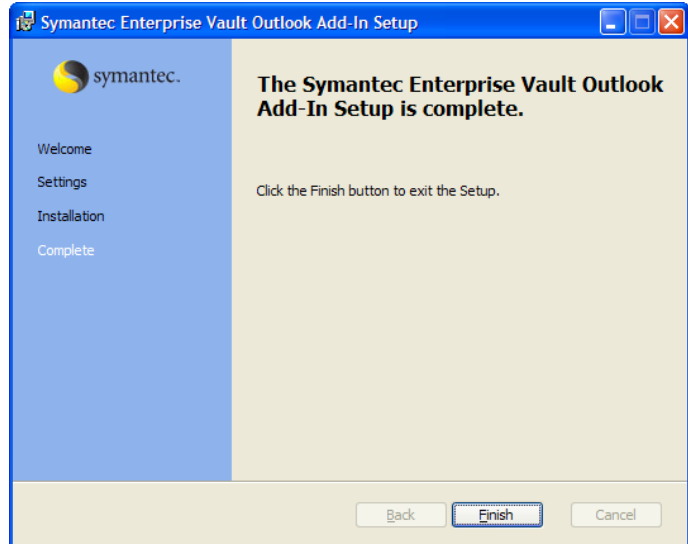


The screen will show a progress bar similar that the one depicted on the right.





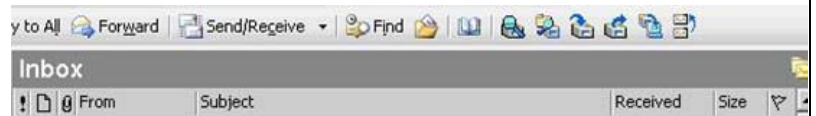
Once the installation has completed click on finish.



Now Open Outlook in the usual way and enter your username and password.

You should now see the Vault control buttons contained within your Toolbar.

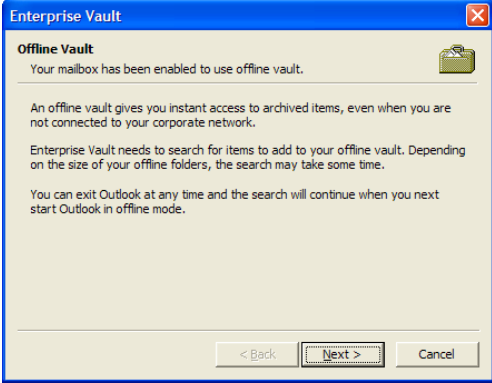
Should this not be the case please contact your CSO for assistance.



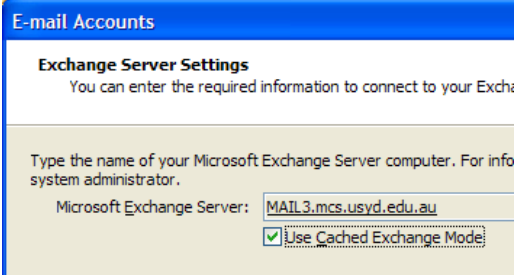
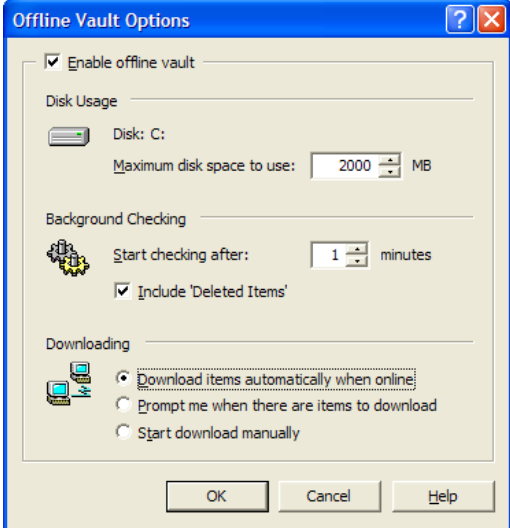


2. EV Default Settings

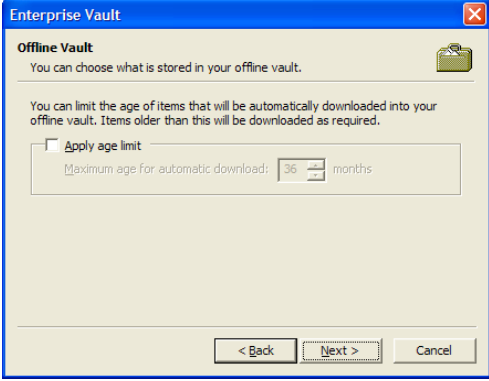
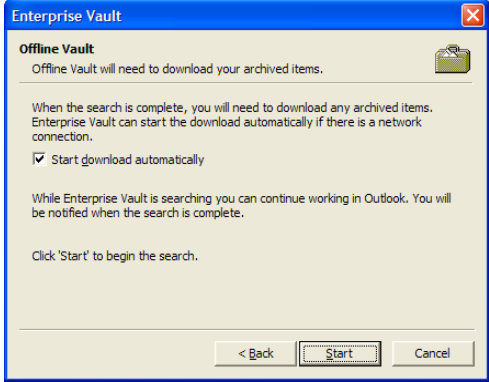

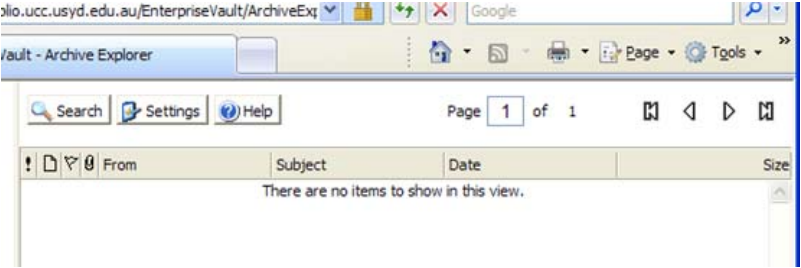
Once you have deployed EV and have verified that the client has been installed correctly the following setup steps need to be followed.

| Action/Outcome | Reference |
|--|---|
| <p>Once the Outlook profile has been created you will be presented with the following Dialog box upon opening Outlook for the first time.</p> <p>NOTE: If this dialog box does not appear then your Outlook profile was not set up using cached mode. Activate the Offline Vault Option by following the steps in the next slide.</p> <p>To continue with the setup click on Next to continue...</p> <p>NOTE: These settings are mailbox specific, not machine specific.</p> |  |

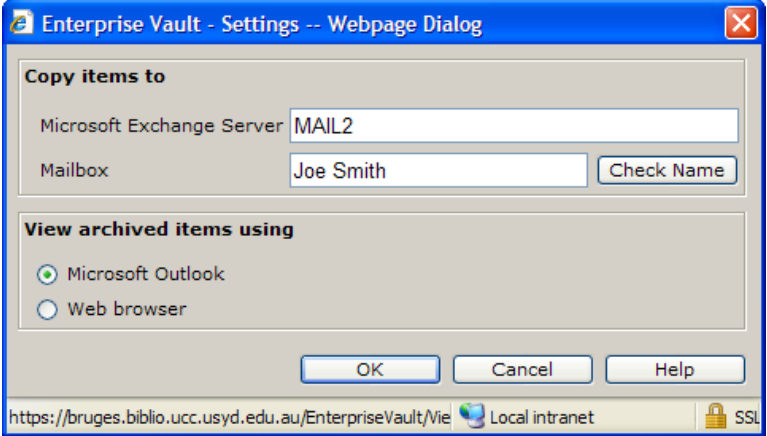


| Action/Outcome | Reference |
|---|--|
| <p>** For Users who did not see the Dialog box on the previous slide **</p> <p>Activate Cached Mode by Navigating to the Mail Outlook Screen and then selecting the Tools Menu;</p> <p>Now Select;</p> <p>E-Mail Accounts -></p> <p>View or Change E-Mail Accounts -></p> <p>Next</p> <p>Now Double-Click on Microsoft Exchange Server and select "Use Cached Exchange Mode"</p> <p>Now select Next and Finish</p> <p>Now Close Outlook and, after 10 Seconds Re-open Outlook.</p> |  |
| <p>Now Select Tools -></p> <p>Enterprise Vault -></p> <p>Offline Vault Options</p> <p>This will bring up the options on the right. Select the tick box "Enable Offline Vault" and select OK.</p> <p>Restart Outlook and the previous slide should appear.</p> |  |



| Action/Outcome | Reference |
|--|--|
| <p>The first option presented will ask the maximum age of items to be kept within your local offline vault.</p> <p>Unless the user has a specific age requirement please leave this option blank.</p> <p>Click Next to continue...</p> |  |
| <p>You are now ready to commence population of the Offline Vault by clicking Start.</p> <p>Once the initial download of messages is complete the Offline Vault will automatically update with any newly vaulted messages.</p> |  |
| <p>Now open the Archive Explorer using the Toolbar button</p> |  |
| <p>Select the settings Button from the top left corner of the main frame.</p> |  |



| Action/Outcome | Reference |
|--|--|
| <p>Within the following dialog box please select the option to View archived items using Microsoft Outlook.</p> <p>Select OK to exit.</p> |  |