Enterprise Vault 11
Feature Briefing
Enterprise Vault Search

This document is about the new Enterprise Vault Search (EVS) feature introduced in Enterprise Vault 11. Other feature briefings for Enterprise Vault 11 can be found here: **http://www.symantec.com/docs/DOC7151**

If you have any feedback or questions about this document please email them to **IIG-TFE@symantec.com** stating the document title.

This document is provided for informational purposes only. All warranties relating to the information in this document, either express or implied, are disclaimed to the maximum extent allowed by law. The information in this document is subject to change without notice. Copyright © 2014 Symantec Corporation. All rights reserved. Symantec, the Symantec Logo, and the Checkmark Logo are trademarks or registered trademarks of Symantec Corporation or its affiliates in the U.S. and other countries. Other names may be trademarks of their respective owners.

Confidence in a connected world. Symantec.

Feature Description

Enterprise Vault 11 introduces a new web-based search application named Enterprise Vault Search (EVS). EVS is intended to replace older Enterprise Vault search applications such as Browser Search, Archive Explorer, and Integrated Search. These older search applications will be discontinued in a future version of Enterprise Vault.

The new search interface provides a modern yet familiar end-user search experience. EVS provides not only searching, but also allows the user to browse archived contents in folders as shown in Figure 1.

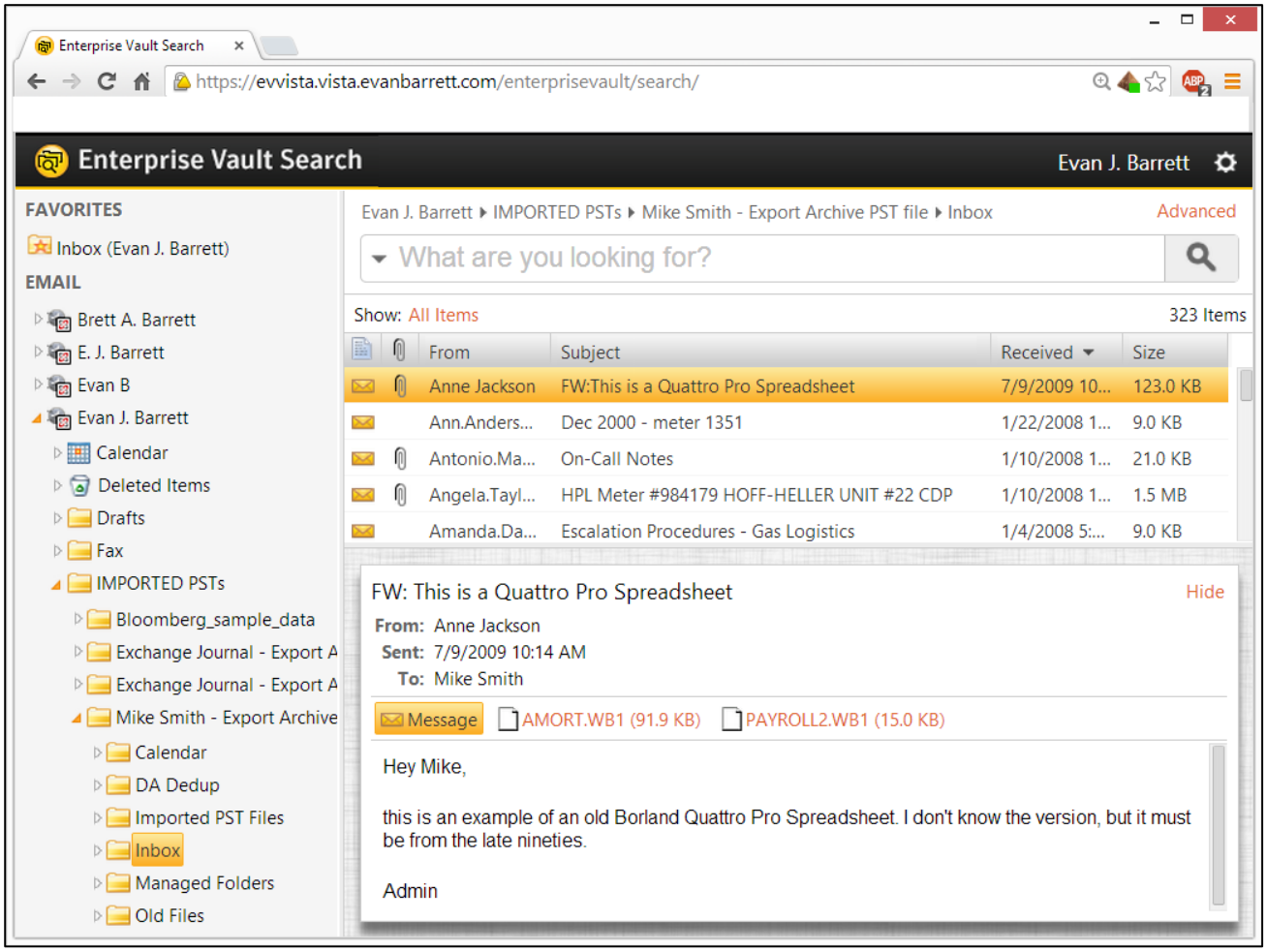

Figure 1 – Enterprise Vault Search

EVS also provides simple and advanced search capabilities. The advanced search capabilities allow the user to specify the scope To, From, Subject, dates, as well as other standard metadata. A new search query syntax is also available (more information is available in Appendix A).

Business Value

The older search interfaces (Browser Search, Archive Explorer, and Integrated Search) were mainly limited to Internet Explorer support only. EVS now supports major web browsers such as Internet Explorer, Firefox, Chrome, and Safari. EVS is optimized for the HTML 5 protocol as well as for PCs and Macs. EVS is supported with all archive types in Enterprise Vault.

Underlying Principles

EVS adds the following new items to Enterprise Vault 11:

- **Search Policies** – These polices define which search options are available to users
- **Search Provisioning Groups** – Search provisioning groups assign policies to Active Directory and Domino objects such as users and groups
- **Client Provisioning Task** – This task applies search policies as defined by search provisioning groups to users. This task is also used with the new EV 11 IMAP feature. A task is needed for each Active Directory and Domino domain from which EV archives.
- **Metadata Store (MDS)** – This new feature with EV 11 enables faster searching for EVS and IMAP by storing indexed content in the Vault Store database. Querying the database provides faster search results versus searching the index. EVS does not require MDS to work, but is required for IMAP. This feature *does not* replace indexing.

When upgrading to EV 11, the legacy search applications (Browser Search, Archive Explorer, and Integrated Search) are still enabled by default for users (new installations will not have the legacy search applications available). A default search policy will be created during the upgrade, but no provisioning groups will be created. The EV administrator will need to upgrade Search to enable EVS for all users (see the Enterprise Vault 11 documentation for more information).

Starting with EV 11, a new IIS virtual directory has been created to handle EVS requests. The virtual directory, "*search*", resides in the EnterpriseVault virtual directory and is accessed using *http(s)://<ev_server_name>/EnterpriseVault/search*.

Guided Tour

User Access

When a user accesses EVS initially, archived content will be presented to the user with ability to navigate through folders. Clicking on an item will show an HTML-rendered version of the archived item in the reading pane if the reading pane is enabled in the search policy assigned to the user (as shown in Figure 2). To view the original item, the user simply double-clicks on the item. The item will be opened with the native application for the archived item (such as Microsoft Outlook if it is an Exchange email or a PDF reader for PDF files).

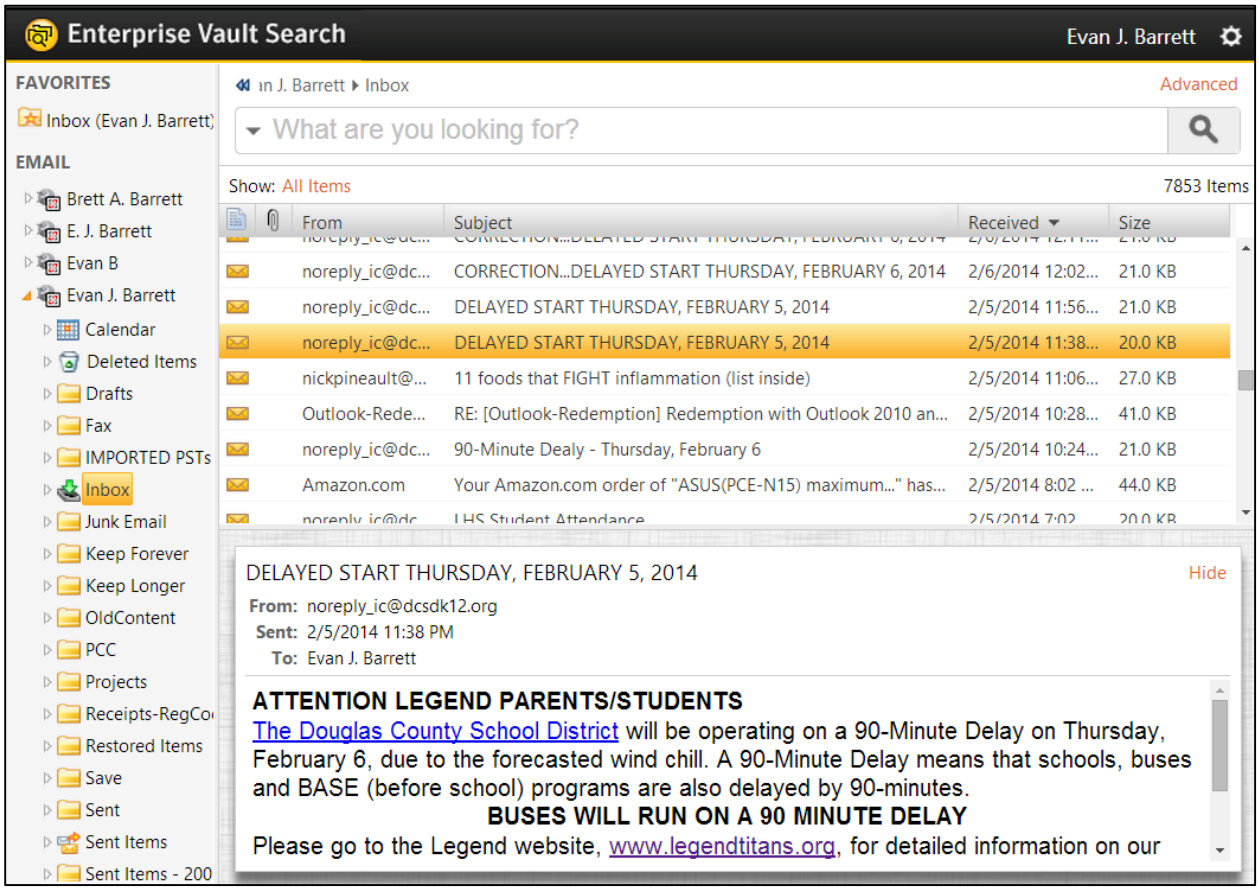

Figure 2 – Navigating in Enterprise Vault Search

A user can search for items with a particular search term or phrase by typing in the keyword(s) or phrase(s) in the search bar in the top middle of the screen. The search query syntax can also be used (see Appendix A for more information). Once the search term has been typed in, the user hits the Enter

key or clicks on the search button on the right side of the text box. Keywords will be highlighted in the results and the preview pane.

Advanced search features are available by clicking on the red Advanced link in the upper right-hand corner of the EVS screen (see Figure 2). The user can add in as many search criteria options as needed by clicking on the plus (+) sign next to any search field (see Figure 3).

Search criteria options include: Received or Sent, From, Subject or Content, Subject, Content, All Recipients (To, CC, & BCC), To, CC, Size, Importance, Attachments, Folder, Archived Date, and Retention Category.

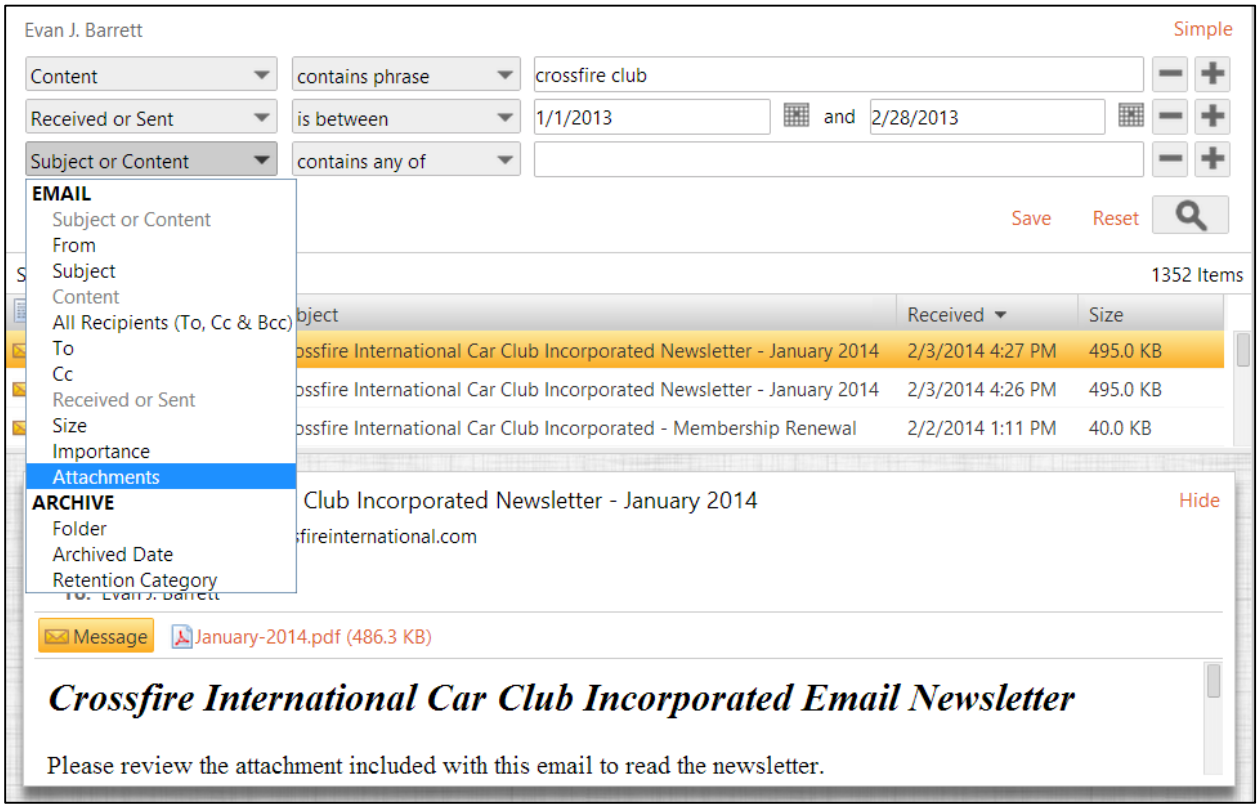

Figure 3 – Using Advanced Search in EVS

Defining Search Policies

Enterprise Vault will include one search policy by default, Default Search Policy. This default policy cannot be deleted, but can be modified. The administrator can modify existing policies or create new policies by using the Enterprise Vault Administration Console (VAC). A policy allows the administrator to

define what types of actions and features are available to a user for EVS. In the search policy properties, options can be set by clicking on the Features tab as shown in Figure 4.

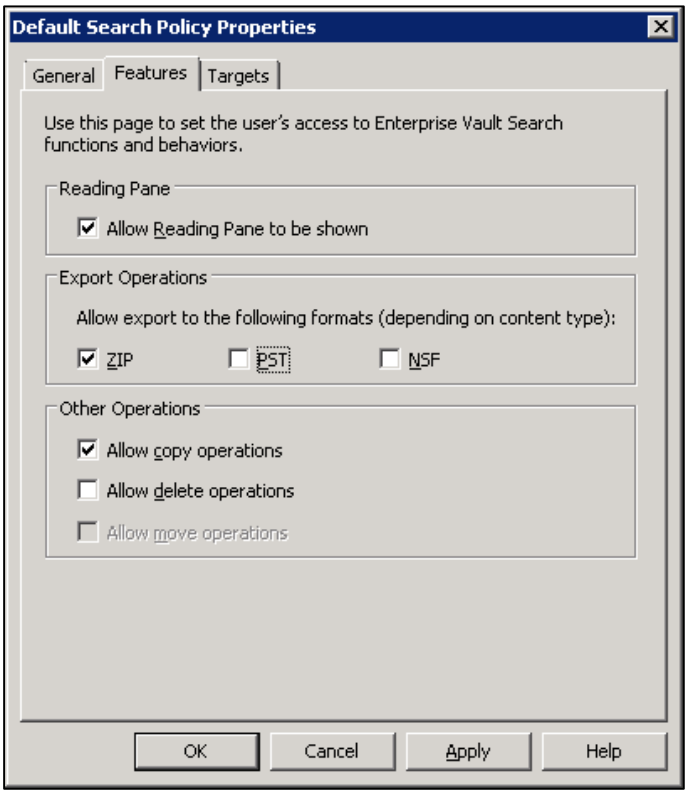

Figure 4 – Search Policy Properties

Options include:

- **Reading Pane** - Enables the reading pane with EVS. The reading pane may need to be disabled in cases where archived content may be stored on slow media (such as tape or the cloud).
- **Export Operations** - Allowing the export of archived content to ZIP, PST, and NSF format (PST or NSF would only be enabled for the appropriate environment such as PST for Exchange and NSF for Domino)
- **Other Operations -** The ability to copy/delete/move archived contents. Delete and move require that item deletions be enabled in other areas of Enterprise Vault such as Retention Categories, site properties, etc.

Defining Search Provisioning Groups

Creating a search provisioning group is accomplished in the Provisioning container in Client Access -> Search in the VAC as shown in Figure 5. When creating a new search provisioning group, the administrator will need to select whether or not the group will be Active Directory-based or Domino-based and the select the appropriate Active Directory or Domino domain that will apply to the group. The administrator will then be able to add users or groups as well as other options depending on which domain type is being used.

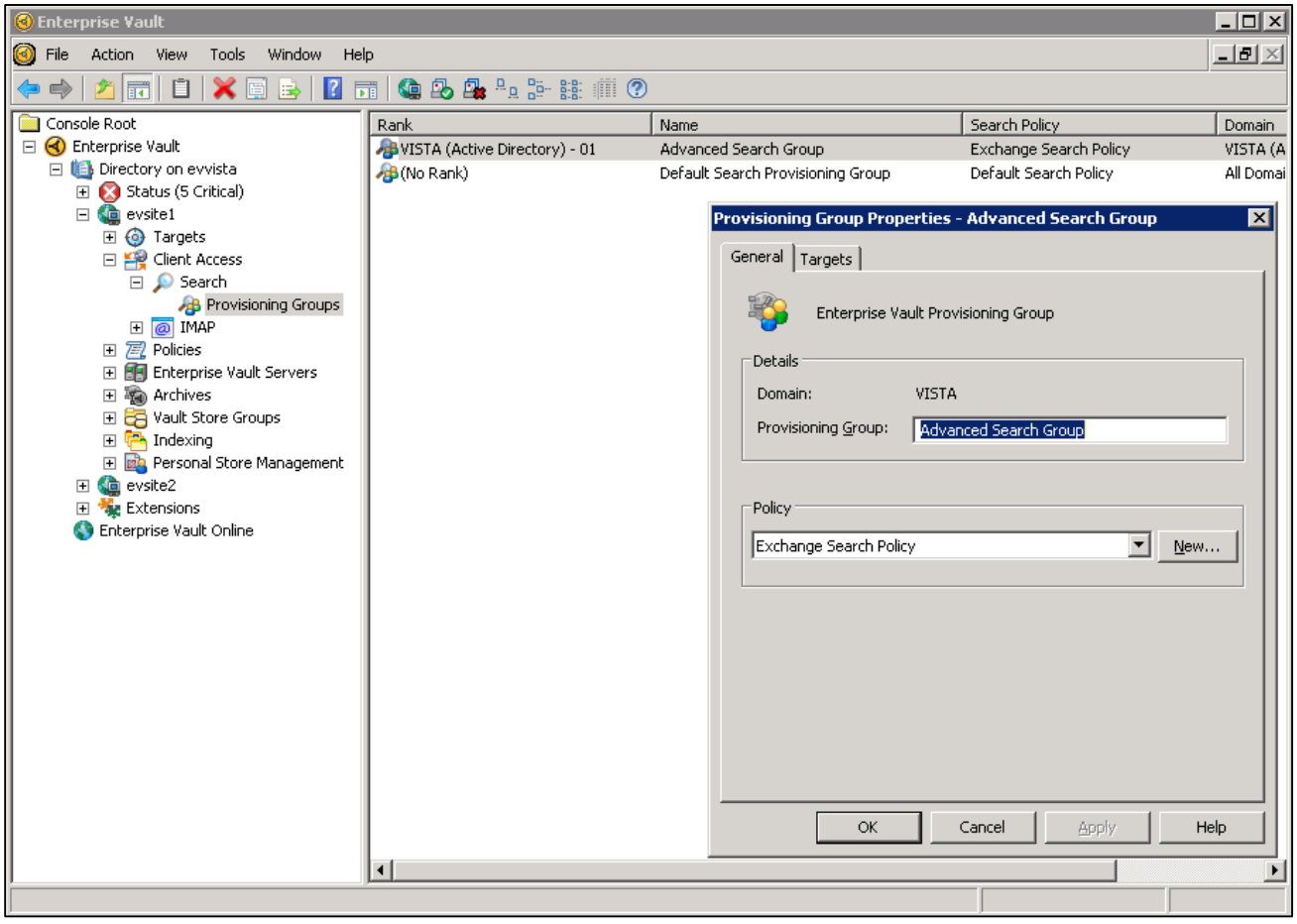

Figure 5 – Search Provisioning Groups

When search provisioning groups are defined, Enterprise Vault will automatically create the Client Access Provisioning Task for the domain if it does not already exist. The task can be set to run twice a day, once during the AM hours and once during the PM hours. The task will also create reports which can be viewed by accessing the *<installation_folder>\Enterprise Vault\Reports\Client Access Provisioning* directory.

Licensing and Support Considerations

The components for Enterprise Vault Search are installed automatically during an upgrade or a new installation. No additional licensing is required to enable the feature.

Support for EVS is currently optimized for PCs and Macintosh systems. Supported browsers include Internet Explorer, Firefox, Chrome, and Safari. For best results, the aforementioned browsers should be at a version that supports the HTML 5 protocol.

Legacy search applications will not be available in a future version of Enterprise Vault. This is only applicable to environments when upgrading to Enterprise Vault 11. New installations of Enterprise Vault will not have the legacy search applications enabled.

APPENDIX A – Search Query Syntax

Enterprise Vault Search offers enhanced keyword or phrase searching by allowing the user to use a query syntax. Examples of the query syntax:

- from:bob – Includes items from someone who has "bob" in the first or last name
- from:"bobby moore" – Includes items from someone with the name "bobby moore". The use of double quotes will ensure an exact match
- subject:"bobby moore" – Includes all items that have "bobby moore" in the subject
- subject:bobby moore – Includes all items that have "bobby" in the subject line and have the term "moore" anywhere else in the document
- date: - The format should be in YEAR-MONTH-DAY (ISO 8601) format such as 2011-12-01
    - Partial dates are supported. For example, date:2009-01..2009-06 would include all items from January 2009 through June 2009.
    - Greater than and less than operators are supported. For example, date:>=2010 would include all items from 2010 and later
    - Before and after are supported. For example, before:2009-01-01 would include all items before January 1, 2009
    - Relative dates are supported. Examples include: date:today, date:this month, and date:last year
- folder: (or in:) – Items contained within a specific folder (such as folder:inbox)
- filetype: - Returns items with specific file extensions (such as filetype:docx)
- Operators: The OR and NOT operators are supported and parenthesis can be used to specify precedence. Examples:
    - hello OR world
    - hello AND NOT world
    - hello AND (world OR planet)
- NEAR – The NEAR operator allows searching for which the first specified term appears within ten words of the second term by default. To change the word distance, simply apply */<number>* after the NEAR operator (such as NEAR/20). Examples:
    - financial NEAR bank
    - financial NEAR/25 bank
- NOTWITHIN – The NOTWITHIN operator will match items that contain the first search term outside the context of the second search term. Example:
    - confidential NOTWITHIN "Disclaimer: This email and any files transmitted with it are confidential"

About Symantec:

Symantec is a global leader in providing security, storage, and systems management solutions to help consumers and organizations secure and manage their information-driven world. Our software and services protect against more risks at more points, more completely and efficiently, enabling confidence wherever information is used or stored.

Headquartered in Mountain View, Calif., Symantec has operations in 40 countries. More information is available at **www.symantec.com**.

For specific country offices and contact numbers, please visit our Web site: **www.symantec.com**

Symantec Corporation
World Headquarters
350 Ellis Street
Mountain View, CA 94043 USA
+1 (650) 527 8000
+1 (800) 721 3934

Copyright © 2014 Symantec Corporation. All rights reserved. Symantec and the Symantec logo are trademarks or registered trademarks of Symantec Corporation or its affiliates in the U.S. and other countries. Other names may be trademarks of their respective owners.