Provision Vaults

Table of Contents

> Note: From the release of Vaultastic Version 4 (V4), users of a Vaultastic domain are called vaults. If your domain is hosted on Vaultastic Version 3, substitute "vault" with "user" when referring to the instructions in this document.

Overview

Every user, whose mail needs to be archived and who needs access to her own archive, will need an individual Vault in your Vaultastic domain.

There are three ways to provision vaults in a Vaultastic domain:

1. To create one vault at a time (https://docs.mithi.com/home/how-to-provision-users-in-vaultastic#manually-provision-users-one-at-a-time) from the admin panel.
2. To create vaults in bulk by uploading a csv file (https://docs.mithi.com/home/how-to-provision-users-in-vaultastic#provision-users-in-bulk-by-uploading-a-csv-with-user-details) with the vault details from the Admin Panel.
3. To enable auto vault creation (https://docs.mithi.com/home/how-to-provision-users-in-vaultastic#automatic-user-provisioning). (This option should be used only in case you are going to enable live email archiving for all the users on your primary domain)

Manually create one vault at a time

Step 1: Add Vaults

1. Log in (https://docs.mithi.com/home/how-to-log-in-to-the-admin-panel) to the Vaultastic application using Vault ID with the admin rights and navigate to the Admin Panel.

2. From the left pane,

    ◦ Select the **domain** from the list of domains.

    ◦ Click the **Vaults** option to view the list of vaults present on the domain.

3. From the middle pane, click the **Add Vault** icon.

4. In the **Add Vault** pop-up, provide the vault id, password, and access.

    ◦ Click the **+** sign to enter the record.

    ◦ Repeat the steps to add more vaults.

    ◦ When done adding all the vaults, click **Continue** to validate the input and add the vaults.

    Note: The vault id and primary email id MUST be the same. For example, if primary email id of the user is **amit**@acmecorp.com, then Vault id of that user MUST be **amit**@acmecorp-com.vaultastic.com

Step 2: Update Vault Properties

For all the newly added vaults set **Primary email id**. The primary email address will be used by the system to send automatic alerts and also to route mail to the right Vault.

Create Vaults in Bulk by importing a CSV

For creating vaults in bulk, follow the steps mentioned below:

1. Log in (https://docs.mithi.com/home/how-to-log-in-to-the-admin-panel) to the Vaultastic application using Vault ID with the admin rights and navigate to the Admin Panel.

2. From the left pane,

    ◦ Select the **Vaultastic domain** from the list of domains.

    ◦ Click the **Vaults** option to view the list of vaults present on the domain.

3. Click the **Import Vaults** option from the Vaults drop-down menu in the middle pane.

4. In the **Create new vaults/ Update vault properties** dialog box, select **Add new vaults from the CSV**. Selecting this option will create the new vaults mentioned in the CSV file. To update the vault properties, select **Update the properties of existing and new vaults from the CSV**.

    Select File to be imported from your machine. (Click the link to Check the CSV File format (https://vaultastic.mithi.com/res/Sample_Vaultastic_VV4_Provision_Vaults_CSV.csv) (https://vaultastic.mithi.com/res/Sample_Vaultastic_VV4_Provision_Users_CSV.csv)to be followed to create vaults in bulk by importing a CSV.)

5. Locate the required CSV file on your machine.

6. Click **Continue** to proceed.

7. In the first pass, the application validates the CSV records. The validation status is displayed on the next screen.

    If there are warnings, you can **Ignore the warnings and Update** the valid vault properties OR you can **Cancel the import**.

In the second pass, all new vaults are added.

For the third pass to start, click on the **Update Properties** button.

The system will now validate the vault properties in the CSV and display the status. To view the invalid properties, click on **Show Invalid vault properties**. To ignore the invalid properties and proceed, select the **Ignoring invalid vault properties** checkbox and click on **Update**.

8. The screen will show the updated status. Click **Done** to exit the dialog box. The newly added vaults will be shown in the middle pane.

CSV File format to be followed to import multiple vaults

Vaultastic V4

Download the sample CSV file to import multiple vaults on Vaultastic V4
(https://vaultastic.mithi.com/res/Sample_Vaultastic_VV4_Provision_Vaults_CSV.csv)

FIELD NAME	RECOMMENDATION	EXAMPLE (CSV USING OFFICE SOFTWARE)	EXAMPLE (CSV USING NOTEPAD)
username (Required to create a vault or update vault property)	- A CSV file MUST contain the username - username of the Vaultastic id MUST be the same as the username of the primary email id Example: If the primary email id is amit.patil@mithi.com then, the username of the Vaultastic id must be amit.patil - username should not contain space or special character except ".", "-", "_" - Do not append the user name with a domain name - username is used to create a vault. Vault ID created automatically in the format username@domain-name	amit amit123 amit.patil amit-patil amit_patil	"amit" "amit123" "amit.patil" "amit-patil" "amit_patil"

FIELD NAME	RECOMMENDATION	EXAMPLE (CSV USING OFFICE SOFTWARE)	EXAMPLE (CSV USING NOTEPAD)
password (Required to create a vault)	• The password should be at least 8 characters long • password should contain one alphabet, one numeral, and one special character • Blank password in the CSV file will be replaced with the default password	password@1	"password@1"
classofservice (This is the Plan assigned to the user. Required to create a user or update user property)	The only allowed value is "hold"	hold	"hold"
alternateemailaddress	Specify the primary email address of the vault. This will be used by Vaultastic to filter incoming mail and also send automatic alerts. Example: The Forgot password application uses this id to send a one-time password or OTP.	amit.patil@baya.in	"amit.patil@baya.in"
accountstatus	The only allowed value is "enabled"	enabled	"enabled"
vaultasticaccess (Required to create a vault or update vault property)	Assign access to the vault. By default, only the postmaster vault id of your Vaultastic domain has Full Access and can view emails from all the vaults. In addition, you can assign Full access to any other vault ids. Refer to the topic: Manage user's access to their Vaultastic accounts (https://docs.mithi.com/home/how-to-manage-users-access-to-their-vaultastic-accounts-and-other-features)	Self Service	"Self Service"

Vaultastic V3

FIELD NAME	RECOMMENDATION	EXAMPLE (CSV USING OFFICE SOFTWARE)	EXAMPLE (CSV USING NOTEPAD)
username (Required to create a user or update user property)	• A CSV file MUST contain username • username of the Vaultastic id MUST be same as username of the primary email id Example: If primary email id is amit.patil@mithi.com then, username of the Vaultastic id must be amit.patil • username should not contain space or special character except ".", "-", "_" • Do not append the user name with domain name • username is used to create userid for the user. userid is created automatically in the format username@domain-name	amit amit123 amit.patil amit-patil amit_patil	"amit" "amit123" "amit.patil" "amit-patil" "amit_patil"
password (Required to create a user)	• password should be at least 8 characters long • password should contain one alphabet, one numeral and one special character • Blank password in the CSV file will be replaced with the default password	password@1	"password@1"

FIELD NAME	RECOMMENDATION	EXAMPLE (CSV USING OFFICE SOFTWARE)	EXAMPLE (CSV USING NOTEPAD)
classofservice (This is the Plan assigned to the user. Required to create a user or update user property)	continuity / tracer / durability / hold continuity	"tracer"	"tracer"
firstname	- First name of the user - First name is concatenated with Last name to form the Display name of the user. It is displayed in the From field when user sends an email.	Amit	"Amit"
lastname	Last name of the user	Patil	"Patil"
alternateemailaddress	Specify the primary email address of the user. This will be used by the system to filter incoming mail and also send automatic alerts. Example: The Forgot password application uses this id to send a one-time password or OTP.	amit.patil@baya.in	"amit.patil@baya.in"
mailfromid	Specify the primary email address of the user. This will be used when a user replies to or forwards a mail from the Vaultastic account.	amit.patil@baya.in	"amit.patil@baya.in"
accountstatus	- Specify the account status of the user as Enabled. - A user whose account status is enabled can access the Vaultastic account.	enabled	"enabled"

Automatic Vault Creation

Overview

You can enable auto vault creation when you are journaling/forwarding mail for all users on your primary domain. When auto vault creation is enabled, vaultastic will automatically provision vaults for all ids of the primary domain as mail for that id are received.

> **Note:** Auto vault creation does not work for LegacyFlo requests.

Enabling Auto Vault Creation

To enable the Auto Vault Creation property,

1. Log in (https://docs.mithi.com/home/how-to-log-in-to-the-admin-panel) to the Vaultastic application using Vault ID with the admin rights and navigate to the Admin Panel.

2. From the left pane, select your domain to be customized.

   i. Enable the **Auto Vault Creation** property displayed under the Auto Vault Creation section.

   ii. For Vaultastic V3, the **Plan Applied** property specifies the default plan to be assigned for the users created automatically.

   iii. Enable/Disable conversion of email ids having a '+' addressing scheme to normal email ids using the **Mail translation for + addressing** property.

   When this option is enabled, a vault having the id before the + character in the original email id will be auto-provisioned. For example, if the mail for sales+87382782173@acmecorp.com arrives for archiving, then the id sales@acmecorp-com.vaultastic.com will be auto-provisioned, and the mail will be archived to the sales account.

   iv. **Save** the settings.

> NOTE: In Vaultastic Version 4 the time to automtically create a Vault can be between 30-60 minutes

Defining the exclude list for auto vault creation

1. Log in (https://docs.mithi.com/home/how-to-log-in-to-the-admin-panel) to the Vaultastic application using Vault ID with the admin rights and navigate to the Admin Panel.

2. From the left pane, select your domain to be customized.

3. Expand the options for **Auto Vault Creation**

4. **Turn On** the setting for **Enable Selective Archiving**

5. In **Skip Archiving for email ids** give the list of Vault IDs (not primary email ids) to be excluded. For each id, enter the full email id and click on the **+** icon.

6. Click on **Save** at the bottom right to save your changes.