Vaultastic Application Interface

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The Vaultastic Application Interface

The Vaultastic Application is accessible to users logging into Vaultastic using a Vault ID.

The Vaultastic Application is divided into three panes.

- On login, the app you will see is the eDiscovery app. This application is used to search through and work on mail in the Active Store.
- The leftmost pane is the **Application Switch**. All the applications in Vaultastic are accessible from the Application Switch. If you have admin rights, you will see the Admin Panel (https://docs.mithi.com/home/vaultastic-admin-guide), Dashboard (https://docs.mithi.com/home/vaultastic-dashboard), and the Inactive Storage App (https://docs.mithi.com/home/inactive-storage-app-guide) icons. Clicking on any icon will launch the app in a separate tab.
- The middle pane is where you will see the search results. The controls on the top of the pane help you search for mail.
- The rightmost pane shows the content of the selected mail.

Using the eDiscovery application to search on the Active Store

Use the Quick Keyword Search

To search through the vaults, you can use the **Quick Keyword Search** box.

The Quick Keyword Search box is on the top of the middle pane.

To see all mail, enter an asterisk (*) and press the Enter key. The search results are shown with the latest mail on top.

To search for mail sent or received on email id, enter the email id and press **Enter**.

To search for a keyword or a phrase, enter the text in the Quick Search box and press **Enter**. Phrases have to be enclosed in double-quotes.

Vaultastic will search for the keywords or phrases in the sender, recipient, subject, and attachment name.

Use Saved or Advance Queries

If you have to repeatedly look for specific patterns, such as mail received by a particular id or mail with a common subject, saving the search query allows re-use.

You can access the Saved Search interface by clicking on the down arrow next to the search icon at the top right corner of the middle pane.

Defining or updating a saved query

To update an existing query, hover over a query in the list. From the options menu depicted by three vertical dots, select Update Search.

To create a new Saved Search Query, click on New Search.

A saved search query consists of the following fields:

Email ID

Clicking on the edit button next to Email ID will pop-up a dialog box.

You can enter the full email id, user id, or domain in the Email ID field of the Saved Search Query.

Click Save when done.

Sender

Clicking on the edit button next to Sender will pop-up a dialog box.

You can enter the full email id, user id, or domain in the Sender field of the Saved Search Query.

Click Save when done.

Recipients

Clicking on the edit button next to Recipients will pop-up a dialog box.

To add email ids, type the full email id, user id, or domain and click on the + icon.

To delete an email id, click on the - icon next to the id to be deleted.

To search for mail having ALL the values in the recipients' field, select the AND operator.

To search for mail having ANY of the values in the recipients' field, select the OR operator.

To see the query formed, click on Show Query. Once the final list is ready, click Save.

Keywords

The list of keywords to be searched for can be built in the same way as the recipient list, as described above, using the query builder.

To define more custom queries for the keyword, use the Query editor.

This pop up will have a single edit box, where you can paste your custom query.

Click **Save** when done.

Example of a custom query to search for keywords only in the Subject
To locate a mail having the keyword Contract in the subject, write a query as follows
(subject:"Contract" OR subject:"contract" OR subject:"CONTRACT")

Example of a custom query to search for keywords only in the body of the mail
To locate a mail having the keyword Contract in the body, write a query as follows
(body:"Contract" OR body:"contract" OR body:"CONTRACT")

General Example of a custom query:
To locate a mail received by John or Meera but not by Mark, write a query as follows.
("john@domain.com" OR "meera@domain.com") NOT ("mark@domain.com")

Note:

- The application does not validate queries submitted from the Query Editor tab.
- Queries submitted from the Query Editor tab have to be updated from the same tab.
- Recipient id or Recipient name should be enclosed in the double-quotes.
- Query combining operators should be written in capital letters
- Special characters + – && || ! ( ) { } [ ] ^ " ~ * ? : \ entered in the keyword are escaped by the tool
- When a query contains Stop words, the result will be generated by substituting the given Stop word with all other stop words. Example: If the query has a "quick and free" phrase, then the Stop word "and" will be substituted with all the other Stop words during the search.
- So any text with phrases such as "quick or free", "quick is free" etc will also appear in the search results.
- The list of English stop words are: a, an, and, are, as, at, be, but, by, for, if, in, into, is, it, no, not, of, on, or, such, that, the, their, then, there, these, they, this, to, was, will, with

Keyword Search Scope

Click on one or more checkboxes (Subject, Body, Attachment) to narrow down the search. By default, none of them are selected and the keyword search scope will include Subject and Body.

Date range

If you want to search for a mail transacted on a single day, specify the date in the On field.

To specify the date range, you can

Select one of the predefined dates ranges in the drop-down list OR

Give the range in From Date and To Date fields.

Saving the changes

Give a name to your saved query and click Save.

Delete a saved query

Hover over the Saved Query and select the Delete Search option from the Options menu depicted by the three vertical dots.

Execute a saved query

Click on the name of the Saved Query. The middle pane will now show you the results. Clicking on any mail will open the mail in the right pane.

Get the most out of the search results

Whether you use a quick search or a saved search, the mails' list will be shown in the middle pane.
Clicking on any mail item will show the mail in the rightmost pane. If your search query includes keywords to be searched in the subject or body, they will be highlighted. To browse through the search results, click on each mail in the middle pane.

Download, or restore mail.

You can download or restore selected mail from the view mail pane.

Upload mail to Ideolve

To collaborate on any mail found on the Active Store on Vaultastic (https://docs.mithi.com/home/vaultastic-active-store), you could upload the mail to Ideolve (https://docs.mithi.com/home/vaultastic-ideolve-integration#uploading-mail-to-ideolve). Ideolve allows you to securely share the contents of the mail with other users.

> **Note:** If you do not see the reply, forward, restore, download, or upload to Ideolve options, contact your system administrator to enable them for your Vault ID.

Download the search summary

Hover your mouse over the Options menu (depicted by three horizontal dots) in the middle pane's top right corner. Select the option to Download the search summary to CSV.

Export search results to PST or **EML**

You can export the search results to PST or EML files.

To submit a job to export the search results,

1. Hover your mouse over the Options menu (depicted by three horizontal dots) in the middle pane's top right corner. Select the option to Export Search Results.
2. In the pop-up dialog box, select **Format**.
    - If you have **Full access**, you can choose from two options, viz. EML or PST.
    - If you have **Self Service access** and can see mails from a single vault, then a third option PST with folders is also available.
        - If you select **EML**, all the mail will be exported as EML in a single ZIP file.

    - Choosing PST will export all mails in a PST file without any folder information.
    - If you select the PST with folders option, then the PST file will have two folders Sent and Received. All mails sent using the primary id will be in the Sent folder and all mails received by the primary id will be in the Received folder.
3. In the **Send link to**, specify your email id. The email with the links to the exported content will be sent to this email id.
4. Click **Export** to submit the job.

On submission of the job, the job will be processed in the background. You will receive a notification mail when the export job starts and when the job completes. On successful completion, the mail will have the link to the exported content which can be downloaded.