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.
- On login, the first app you will see is the eDiscovery app. This application is used to search through and work on mail in the Active Store.
- The Vaultastic Application is divided into three panes. 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 icons for admin apps such as Admin Panel (https://docs.mithi.com/home/vaultastic-admin-guide), Dashboard (https://docs.mithi.com/home/vaultastic-dashboard), and the Open Storage App (https://docs.mithi.com/home/inactive-storage-app-guide). Clicking on any icon will launch the app in a separate tab.
- The middle pane of the eDiscovery application 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 by any email id, enter the email id and press **Enter**.
- To search for a keyword or a phrase within the subject or the attachment name, enter the text in the Quick Search box and press **Enter**. Phrases have to be enclosed in double quotes.

Use Saved or Advance Searches

- If you have to repeatedly look for specific patterns or want to perform an advanced search with a combination of search elements, use the Saved Search interface.
- You can access the Saved Search interface by clicking on the down arrow next to the Quick Search edit box in the middle pane. Searches saved will be listed under the Saved Searches tab. You can add a new search by clicking the + icon next to the Quick Search edit box.

Defining or updating a saved query

- To update an existing query, hover over a saved search 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**
  - To search for an email id in the From or To/CC fields of a mail, use the Email ID control. Enter a full email id or give only the user id or domain. You can search for more than one email id at a time.
  - For example, if you entered 'john' and 'jane' as the ids to search for, then the search will be for 'john' OR 'jane' in any of the email fields - From/To/CC.
- **Sender**
  - When you want to search for email id only in the From field of any email, use the Sender control. You can specify the full email id or only the user id or only the domain. You can specify more than one ID in the Sender control.
  - For example, if you entered 'john' and 'jane' as the ids to search, then the search will be for 'john' OR 'jane' in the From field of the email.
- **Recipients**
  - When you want to search for email IDs only in the To/CC fields of any email, use the Recipients control. You can specify the full email id or only the user id or only the domain. You can specify more than one ID in the Recipients control.
  - To search for mail having ALL the ids in any of the recipients' fields, select the AND operator. To search for mail having ANY of the values in the recipients' field, select the OR operator.
  - To give complex queries, such as looking for all mail sent to 'john' BUT NOT 'jane', use the Query Editor accessible from the pencil icon next to the Recipients control.
- **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 the Subject, Body, and

attachment name.

- **Keywords**
  - To search for keywords in the Subject, Body, or the name of the attachment, use the Keywords control. You can specify words or phrases. Phrases must be enclosed in double-quotes.
  - You can specify more than one keyword/phrase. The system will search for all the keywords and phrases, using the operator selected. For example, if you entered "Hello" and "World" as the keywords and the operator was 'OR', then the system will search for the emails having either of the keywords present in the selected fields. If you entered "Hello" and "World" as the keywords and the operator was 'AND', then the system will search for the emails having BOTH the keywords present in the selected fields.
  - To give complex queries, such as looking for all mail having the keyword 'Hello' BUT NOT 'World', use the Query Editor accessible from the pencil icon next to the Keywords control.

- **Samples for the Query Editor**

  > **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

- **Date range**
    - If you want to search for 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 date 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 email 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 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 emails 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 emails 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 emails sent using the primary id will be in the Sent folder and all emails 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.