



Discovery & Compliance Archiving

Admin Guide

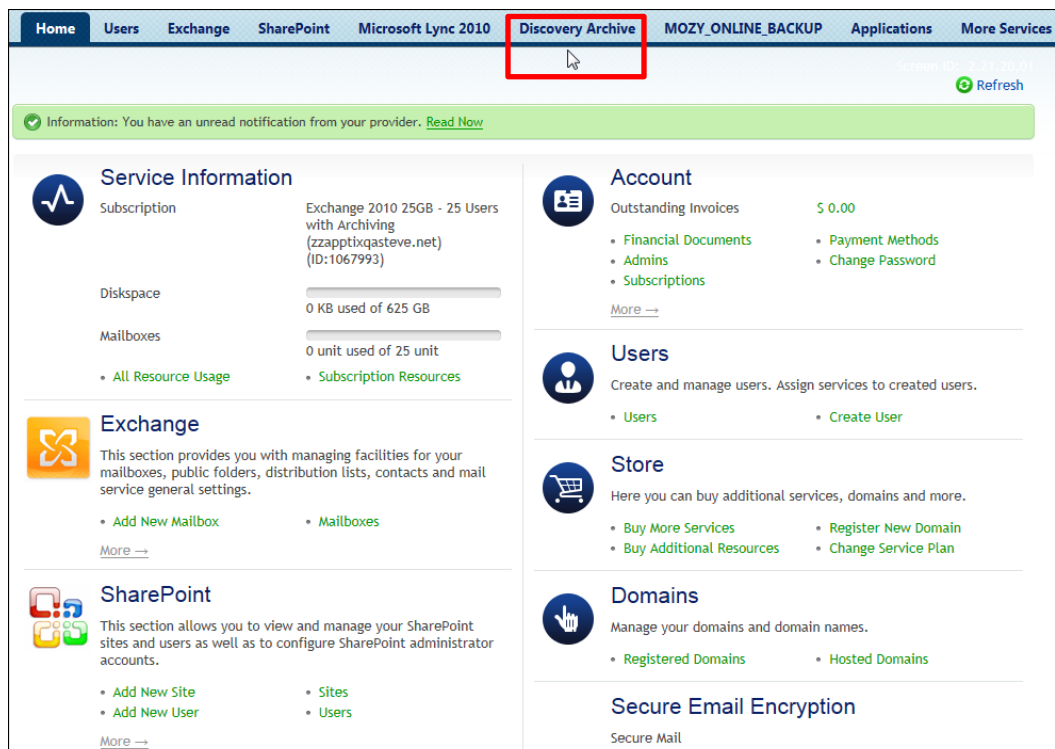
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Enabling Archiving in the Hosting Control Panel

Discovery Archiving securely captures and stores all email messages that have been sent and received in a central repository. The stored messages are easily accessible from a number of different devices, for convenience and increased productivity. By adding Exchange archiving to their Hosted Exchange account, users in effect get an unlimited mailbox, because there are no limits to the number of email messages that can be stored. All of the messages are indexed for fast searching and are tamper-proof to meet security requirements.

1. Log into the Hosting Control Panel (depending on the services you have purchased, your view of the Control Panel may be slightly different).



2. Select **Discovery Archive** from the menu bar. The **Discovery Archive** dashboard displays:



3. Select **[Create]**. The first **Discovery Archive** enablement screen displays:

Home >

Discovery Archive

Help Refresh Up Level

Please specify values for settings.

Discovery Archive
Discovery and Compliance Archiving supports regulatory compliance and streamlines eDiscovery in cases of litigation, while enabling customers to implement secure email archiving.

ACCOUNT SETUP

Org Type

ADDRESS AND PHONE

Address Line 1

Address Line 2

City

State

Zip

Contact Phone

ADMINISTRATOR

Admin username

Admin Password
Admin Password for the archive portal.

Administrator first name

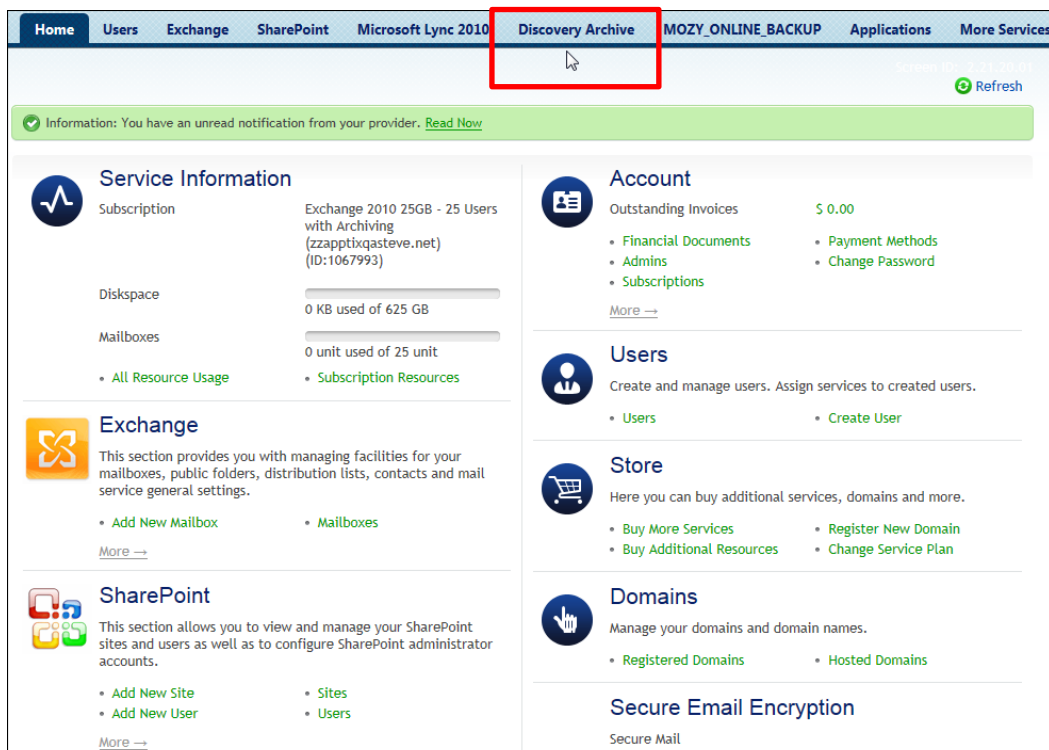
Administrator last name

Administrator primary email

4. Enter basic account setup information on this screen and click **[Next]**.
The summary screen displays.
5. Review the information you entered and click **[Finish]**.
Archiving is enabled.
You can now add existing mailboxes (all users in company) to be archived.
To grant end users access to their archives, or setup searches, see the following steps.

Add Users to Discovery Archiving

1. Click the **Discovery Archive** tab from the Control Panel home page:



The **Discovery Archive** dashboard displays, with the **Personal Access** tab on top:



2. On the **Personal Access** tab, click the **[Add New]** button.
The first screen of the **Add New User** wizard displays:

Home >

Discovery Archive

Refresh Up Level

Personal Access **Discovery Archive**

Please select if you want to create Personal Access under new service user or based on existing one

Service User

New Service User

Existing Service User

Next >> Cancel

- You can select **Existing Service User** and then select the appropriate user from a list of users (if others have already been created) and click **[Next]**.

The next wizard screen displays:

Home >

Discovery Archive

Refresh Up Level

Personal Access **Discovery Archive**

Please specify settings for services

Personal Access
Users who can, at a minimum, access their own archive.

Search Role
A Role determines the permissions that this user has in viewing the archives.

SEARCH PERMISSIONS

SU	<input type="checkbox"/>	SU - Search User - can only access the searches created by Search Admins
SA	<input type="checkbox"/>	SA - Search Admin - can create new searches and manage search settings
SAPlus	<input type="checkbox"/>	SAPlus - Search Admin Plus - can create new searches, manage search settings, and access Reports

Do not set these values

Archive User Id

Portal Username

<< Back Next >> Cancel

- Select the appropriate **Search Permissions** from the offerings and click **[Next]**.
By default, this user will have access to their personal archive.
If additional permissions are required, you may check any combination of the following boxes (optional):

SU: The Search User can only access searches created by Search Admins.

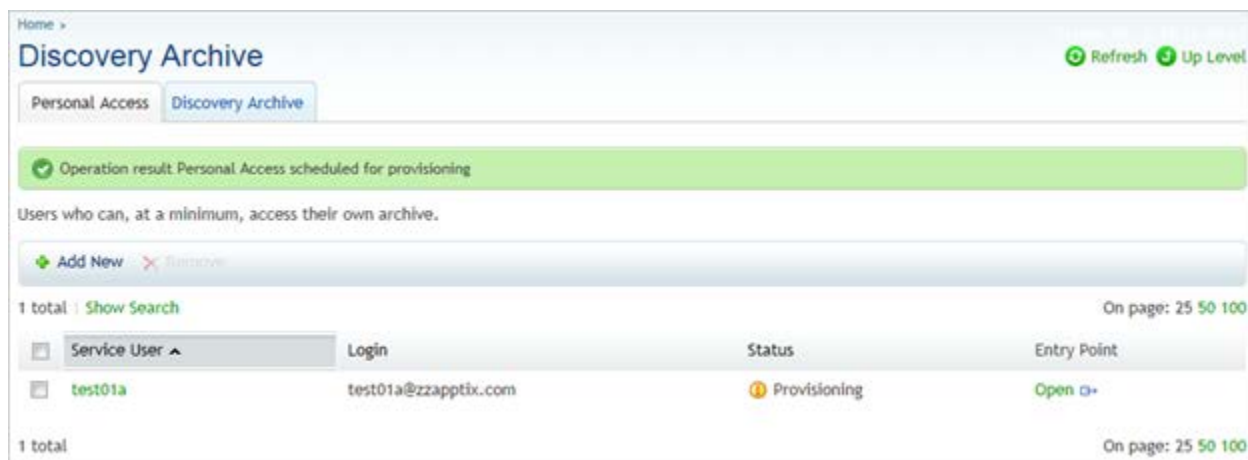
SA: The Search Admin can create new searches and manage search settings.

SAPLus: The Search Admin Plus can create new searches, manage search settings, and access reports.

The summary screen displays.

5. Review the information and click **[Finish]**.

The new user is added to the list that displays on the **Personal Access** tab:



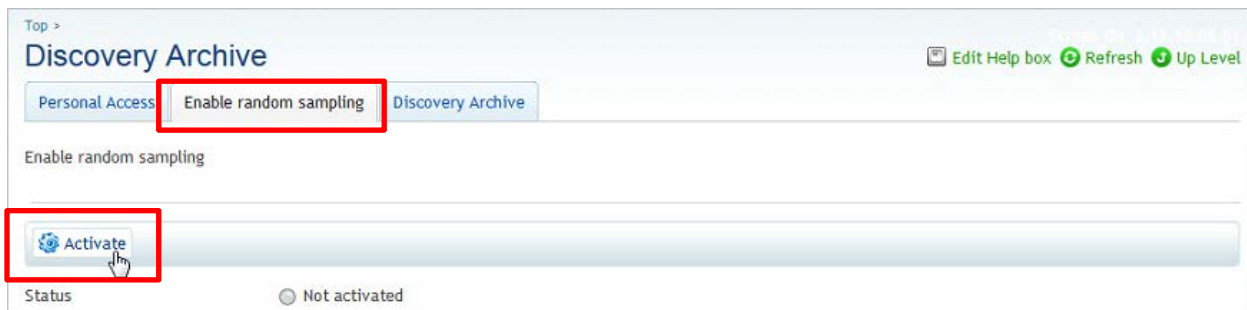
The screenshot shows the 'Discovery Archive' interface with the 'Personal Access' tab selected. A green notification bar at the top indicates 'Operation result Personal Access scheduled for provisioning'. Below this, a table lists users who can access their own archive. The table has columns for 'Service User', 'Login', 'Status', and 'Entry Point'. One user, 'test01a', is listed with a status of 'Provisioning' and an 'Open' entry point. The interface also includes 'Add New' and 'Remove' buttons, a search bar, and pagination controls.

Service User	Login	Status	Entry Point
test01a	test01a@zzapptix.com	Provisioning	Open

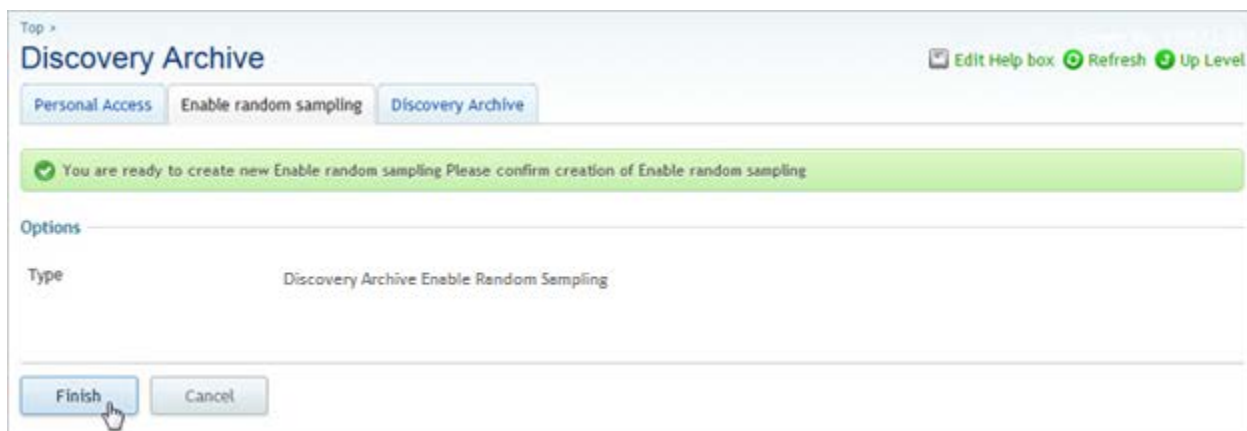
Enable Random Sampling

Enable Random Sampling is designed to streamline compliance by simplifying the review and supervision of email messages. It is the leading cloud-based archiving solution for SEC- and FINRA-compliant email archiving.

1. Select the **Enable random sampling** tab:



2. Click the **[Activate]** button.
Random Sampling is ready to be activated:



3. Click **[Finish]** to complete activation of Random Sampling.