

How To Use Gwava Retain Archiving

<https://retain.lccountymt.gov/RetainServer/Manager/login.jsp>

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How To Use Gwava Retain Archiving

Overview

There are five tabs in the Retain Interface:

- Browse: for casual browsing and filtering. You may only browse one mailbox at a time.
- Search: for in-depth search, possibly across many mailboxes.
- Exported Items: List of all PDF exports
- Tag Definitions: allows the creation and removal of Tags, their automatic comment, and name.
- Options: for changing user settings.

Browse Tab

The Browse function tab is designed to look very similar to the GroupWise WebAccess. The window is divided up as follows



1. Folder list, of currently browsed mailbox.
2. Contents of currently selected folder.
3. Toolbar, to perform date filtering, quick searching, and additional functions.

You browse through a mailbox when you are casually looking at the contents, or have a pretty good idea of where and when the item was created. Use the Search function tab for advanced search criteria.

When you first log in

Normally you will be automatically browsing the mailbox to which you have been assigned rights. This mailbox setting will persist between login sessions.

If the mailbox is empty, or you have not been assigned a mailbox initially, you may wish to use the "New Mailbox" toolbar option, which is available only if you have access to multiple mailboxes.

You may only browse one mailbox at a time (you can SEARCH multiple mailboxes using the Search function tab). To switch mailboxes, you can use the "New Mailbox" toolbar option, which is available only if you have access to multiple mailboxes.

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Folder List (1)

All of the folders in the Mailbox appear on the left side of the screen. You may expand/contract the tree by clicking on the  and  icons. You can view a folder's contents by clicking on the folder's name.

Note: Specific GroupWise folders appear only when at least one item has been archived in them. For example, the Checklist folder will not appear until an item is archived from your live mailbox's Checklist folder.

Note: If message items do not appear or are missing when you click a folder, make sure the Date Filter (toolbar) is set correctly.

Message List (2)

The Message List displays the currently selected folder's contents or the results of a Quick Search. In both cases only items fitting your Date Filter range will be displayed.

The exact columns which appear are mapped to the appropriate columns for that folder type.

Similar to WebAccess an icon  will appear to indicate the presence or absence of attachments. Also, various icons will appear to indicate the type of message (Mail, Appointment, etc.).

To view a message, click on the SUBJECT or FROM links of the message. From there, you can download pieces of the messages, view the message, and its properties.

The checkbox to the left can be used to select multiple messages, and to perform a function upon them. Currently the only functions available are Forward or PDF Export . You may use the checkbox in the table header to toggle/untoggle all messages currently listed.

You view items on a page basis. By default the number of messages displayed in a page is 25, but that can be changed in the Options Tab > Miscellaneous Tab. You can move from one page to another by clicking the NEXT and PREVIOUS buttons in the toolbar.

Toolbar (3)

The toolbar contains the following icons:

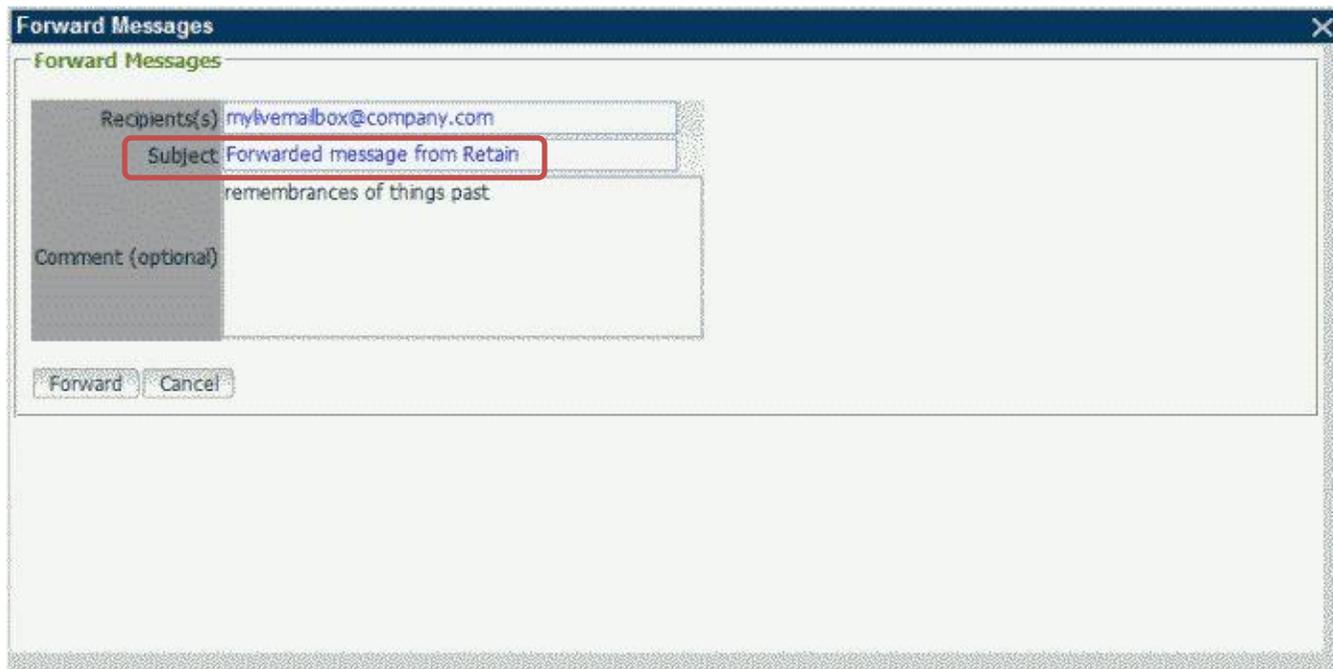
- Forward: allows you to forward messages to a live mailbox
- PDF Export: allows you to select many messages, and export them to a single PDF file
- Print: allows you to print the message list
- New Mailbox (optional): allows you to switch to another mailbox if you have rights to one
- Quick Search: allows a quick search of the currently selected folder
- Date Range Filter: restricts the display of message items to a specific date range
- Previous/Next: allows you to view items on a page by page basis

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Forward

This function allows you to forward messages to any live SMTP mailbox. Simply select the messages you wish to forward, and click forward. Then fill out the requested information (address, subject, optional comment), and click Forward. The address/Recipients line does not autofill from GroupWise, so you will need to type the whole email address carefully.

The message will be from retain@lccountymt.gov, so you might want to add your name to the Subject line – Forwarded message from “Your Name” or put a subject that the receiver will recognize.



Forward Messages

Forward Messages

Recipients(s) mylivemailbox@company.com

Subject Forwarded message from Retain

remembrances of things past

Comment (optional)

Forward Cancel

PDF Export

This function allows you to select many messages, and export them to a single PDF file. This can be extremely convenient for e-discovery and sharing purposes.

Simply select some messages and click the icon.

You will see a wide variety of configuration options. In brief:

- You may set all sorts of cover page information.
- You may password protect the PDF.
- You may set size limits, and determine what types of attachments, if any, should be included.
- You may customize the headers, and the exported file name.
- You may set the time zone or page dimensions.
- An email will be sent to the address in the first box when the PDF export job is complete.

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After clicking export, the PDF job runs in the background. When it is complete, you may access it from the Exported Items tab.

There are two lists provided. One shows any currently running PDF Export jobs. You may cancel these at any time. The other displays completed PDF export jobs. You may download and/or delete these exports. You may also cancel the job at any time from that tab, and delete old PDF exports.

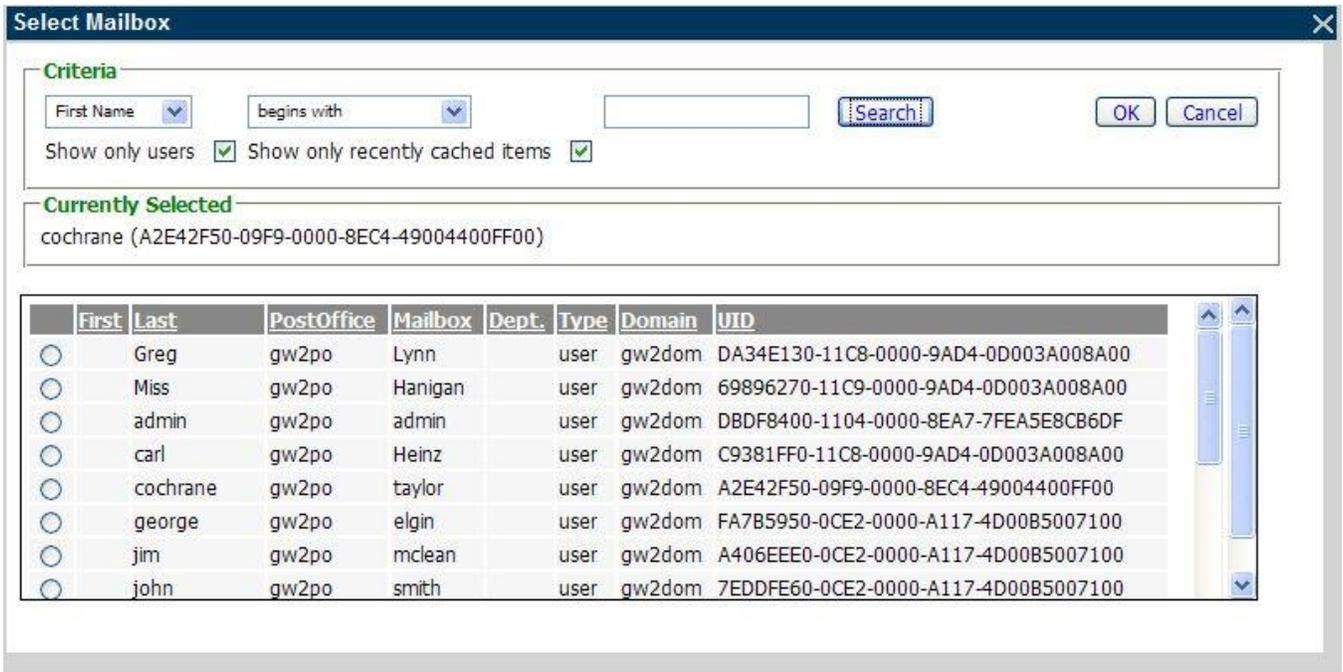
(See section on PDF Export – page 13 - for more information)

Print 

You can print the message list by clicking on this icon. Only the current page will be printed.

New Mailbox  - This is rare in our environment.

If you have rights to view more than one mailbox, this icon appears and allows you to switch to another mailbox. The mailbox selected is saved, so the next time that you logon, you'll be automatically browsing that mailbox.



	First	Last	PostOffice	Mailbox	Dept.	Type	Domain	UID
<input type="radio"/>	Greg		gw2po	Lynn		user	gw2dom	DA34E130-11C8-0000-9AD4-0D003A008A00
<input type="radio"/>	Miss		gw2po	Hanigan		user	gw2dom	69896270-11C9-0000-9AD4-0D003A008A00
<input type="radio"/>	admin		gw2po	admin		user	gw2dom	DBDF8400-1104-0000-8EA7-7FEA5E8CB6DF
<input type="radio"/>	carl		gw2po	Heinz		user	gw2dom	C9381FF0-11C8-0000-9AD4-0D003A008A00
<input type="radio"/>	cochrane		gw2po	taylor		user	gw2dom	A2E42F50-09F9-0000-8EC4-49004400FF00
<input type="radio"/>	george		gw2po	elgin		user	gw2dom	FA7B5950-0CE2-0000-A117-4D00B5007100
<input type="radio"/>	jim		gw2po	mclean		user	gw2dom	A406EEE0-0CE2-0000-A117-4D00B5007100
<input type="radio"/>	john		gw2po	smith		user	gw2dom	7EDDFE60-0CE2-0000-A117-4D00B5007100

Note: Only mailboxes that you have rights to will be displayed.

1. You may search for an entry in address book by Mailbox (id), First Name, or Last Name. You can leave the criteria blank to show ALL addresses.
2. You can leave selected (or deselect) the Show Users checkbox. By default this is on, and thus skips Resources.

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3. You can leave selected (or deselect) the Show Recently cached Items checkbox. By default this is on, and skips address book entries that have not been active (no items stored) in the last 10 days).
4. Finally, click the SELECT button. Items that fit the criteria will be displayed. You can select the mailbox you want by clicking on the radio button  next to the mailbox, and then clicking OK.

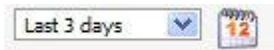
Quick Search



The Quick Search allows a quick search of the currently selected folder. Type a word, click the  Find icon and it will be searched for in the FROM, TO, SUBJECT, and FULL TEXT. Only items which fit the criteria (and the Date Range!) will be displayed. To reset the Quick Search, simply clear out the contents and click the Find icon again.

Please pay particular attention to the date range filter. Only messages that match the date range filter are displayed. If you don't see the results you expect, check the date range filter to be sure that the settings are correct.

Date Range Filter



The Date Range Filter restricts the display of message items to a specific date range. Items outside the date range **are not displayed**.

The reason why the Date Range Filter exists is because a mailbox contains potentially a million messages or so. It doesn't make sense to page through anything but a small subset of the store. Also, users usually have a reasonably good idea of the date period in which the message of interest was delivered.

The Date Range Filter is persistent. That means that if you switch tabs or log off, it will be saved and preserved. This is usually a good thing, but can be confusing at first.

Changing the Date Range Filter can be done in three ways:

1. Use the pull down menu to select a pre-selected entry such as "last 3 days"
2. Use the  to set a custom date range. This will also be preserved across sessions.
3. Use the Options function tab (Miscellaneous) section to set the Date Range filter.



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Previous/Next Buttons



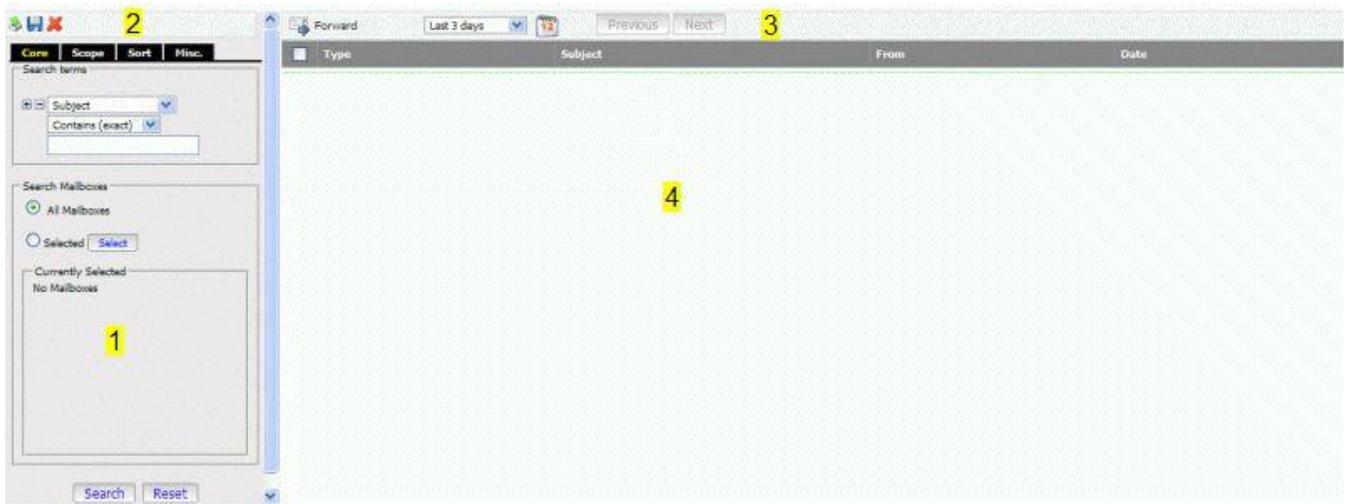
You view items on a page basis. By default the number of messages displayed in a page is 25, but that can be changed in the Options Tab > Miscellaneous Tab. You can move from one page to another by clicking the NEXT and PREVIOUS buttons in the toolbar.

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Search Tab

While the Browse function tab is designed to permit casual browsing and searching on a single mailbox at a time, the Search function tab provides the capability to perform in depth searches, across multiple mailboxes if you have access to them.

The Search function tab is divided up as follows:



1. Search Criteria are entered here.
2. You can save, load, and delete searches here.
3. Toolbar, to perform date filtering, and additional functions.
4. Message List where the results of a search are displayed.

A Search Persists (1)

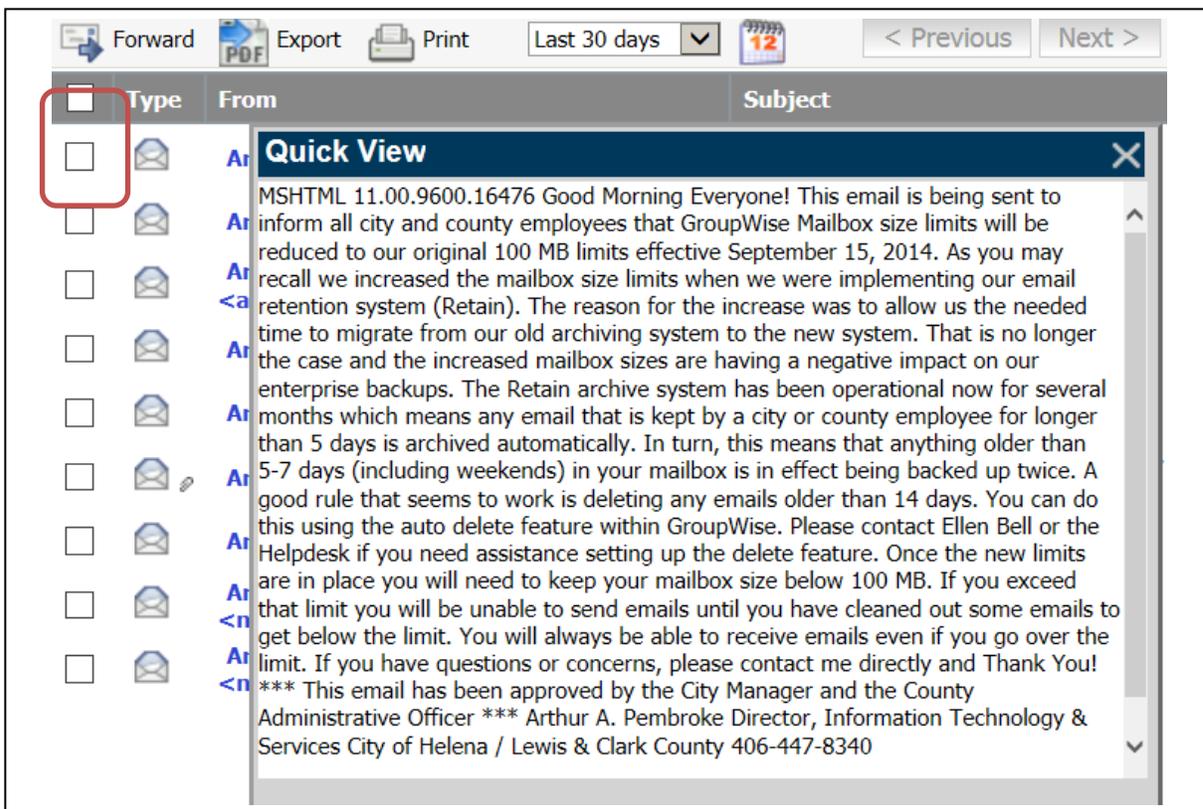
After you run a search by clicking the SEARCH button, the search criteria will remain, even if you logout or switch tabs. This makes repeating frequent searches easy.

To clear a search and start over again, click the RESET button.

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Quick View

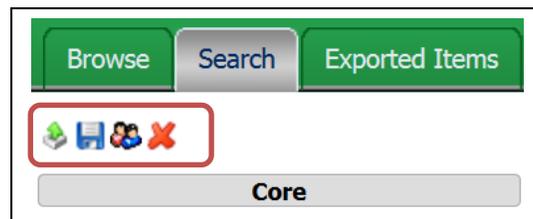
The search messages interface allows to quickly view items. Accessing the quick view is simple. Simply select the item icon in the 'Type' column, (mail envelope icon), to produce the quick-view for that item. The quick view displays up to the first 2kb of text for that item in a small window.



Saving, Loading, Sharing, and Deleting Searches (2)

As noted above the current search is always saved for you. But what if you need to save many different searches?

- To **SAVE** a search, click the  button. You'll be presented with a popup, displaying your currently saved searches, and can save an additional search (up to 10).
- To **LOAD** a search, click the  button. You'll be presented with a popup, displaying your currently saved searches, and can load a previously saved search.
- To **DELETE** a search, click the  button. You'll be presented with a popup, displaying your currently saved searches, and can delete a previously saved search.
- To **SHARE** a search with another user, click the  button. You'll be presented with a popup, displaying your currently shared searches, and can unshare a search, or share other searches with users. The users get read-only access to your search but may save their own customized search to their account.



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Searching for an Item

The search window itself is divided into 4 sections. You can switch between them by clicking on the

Core | **Scope** | **Sort** | **Misc.** tabs.

When you click the SEARCH button, settings on all 4 tabs are used for the search. A common error is to forget that you've left a setting on a nonvisible tab!

The Date Filter on the toolbar (see below) is also used to narrow the search.

- Core - You specify your search terms here, and can specify which mailboxes to be searched.
- Scope - You specify what types of items (appointments, mail, etc.), item source (incoming, outgoing, etc.) and attachment size here.
- Sort - You specify the sorting of the results here.
- Misc - Currently this is where you specify the ranges for Begin and End/Completed Dates. These are relevant for appointments and tasks.

Searching - The Core Tab

The Core tab contains the most common search criteria options.

Search Terms

At the top, you can specify one or more search terms. You may click on the  icon to add more search terms, and on the  icon to delete the search term.

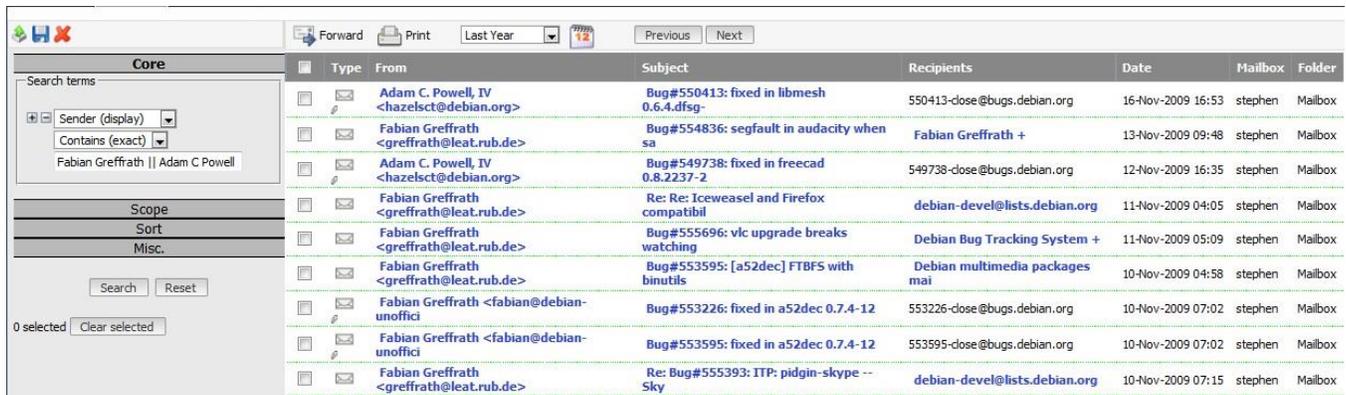
You use the pulldown menus to select what terms to search on, and how your comparison will be performed.

Currently all search terms are AND'ed together.

Boolean 'OR' Searches

If you would like to conduct a boolean 'OR' search inside one of your search terms, you may use || between your keywords to achieve the boolean 'OR' search on those keywords. The following screen shot shows a boolean search for two senders, Fabian Greffrath and Adam C Powell.

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Type	From	Subject	Recipients	Date	Mailbox	Folder
	Adam C. Powell, IV <hazelsct@debian.org>	Bug#550413: fixed in libmesh 0.6.4.dfsg-	550413-close@bugs.debian.org	16-Nov-2009 16:53	stephen	Mailbox
	Fabian Greffrath <greffrath@leat.rub.de>	Bug#554836: segfault in audacity when sa	Fabian Greffrath +	13-Nov-2009 09:48	stephen	Mailbox
	Adam C. Powell, IV <hazelsct@debian.org>	Bug#549738: fixed in freecad 0.8.2237-2	549738-close@bugs.debian.org	12-Nov-2009 16:35	stephen	Mailbox
	Fabian Greffrath <greffrath@leat.rub.de>	Re: Re: Iceweasel and Firefox compatibil	debian-devel@lists.debian.org	11-Nov-2009 04:05	stephen	Mailbox
	Fabian Greffrath <greffrath@leat.rub.de>	Bug#555696: vlc upgrade breaks watching	Debian Bug Tracking System +	11-Nov-2009 05:09	stephen	Mailbox
	Fabian Greffrath <greffrath@leat.rub.de>	Bug#553595: [a52dec] FTBFS with binutils	Debian multimedia packages mai	10-Nov-2009 04:58	stephen	Mailbox
	Fabian Greffrath <fabian@debian-unoffici	Bug#553226: fixed in a52dec 0.7.4-12	553226-close@bugs.debian.org	10-Nov-2009 07:02	stephen	Mailbox
	Fabian Greffrath <fabian@debian-unoffici	Bug#553595: fixed in a52dec 0.7.4-12	553595-close@bugs.debian.org	10-Nov-2009 07:02	stephen	Mailbox
	Fabian Greffrath <greffrath@leat.rub.de>	Re: Bug#555393: ITP: pidgin-skype -- Sky	debian-devel@lists.debian.org	10-Nov-2009 07:15	stephen	Mailbox

Searching - The Scope Tab

The Scope tab lets you set the criteria in three different areas of interest. The first two are similar to WebAccess's search feature.

- You can limit the search to specific types of messages. For example you could search only for Appointments, by checking on the Appointment checkbox. Leaving all checkboxes unchecked will search for all types items.
- You may specify specific item sources of messages. For example, only incoming items will be searched for if you check on the incoming checkbox. Leaving all checkboxes unchecked will search for all types items.
- You can narrow your search further by choosing a range of sizes for attachments. Rather than having to know a specific size of the attachment, you select a predefined range of sizes here.

Searching - The Sort tab

The Sort tab is pretty straightforward. You can sort by up to three levels, using criteria such as created date, Sender, Sender Domain, etc.

Searching - The Tags Tab

You may narrow your search to include only messages that have been tagged by someone with one of the tags listed on the Tag Definitions Tab.

Searching - The Misc Tab

The Misc tab lets you set individual ranges for the Begin Date and End/Completed Date fields. These are usually relevant only for Appointments and Tasks, and will produce unpredictable results searching other items.

It's important to understand the distinction between these criteria and the Date Range Filter discussed below. The Date Range Filter lets you search for an item CREATED within a certain date range. However, for Appointments and Tasks, that may not be what you want or need. You may want to be searching, for example, for Appointments that BEGAN between January 15, 2008 and January 20, 2008.

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The date they began has no correlation to the CREATION time (they could have been created 2 years before that).

The BEGAN and END/COMPLETED Range Filters let you set specific ranges to search for these criteria. The default is (any date) (these are ignored), but you may click on the RANGE buttons, and a popup will appear letting you set a specific range.

Toolbar (3)

The toolbar contains the same icons as the Browse Tab, minus the Quick Search. (See page 4).

Message List (4)

The Message List displays the currently selected folder's contents or the results of a Quick Search. In both cases only items fitting your Date Filter range will be displayed.



The exact columns which appear are mapped to the appropriate columns for that folder type.

Similar to WebAccess an icon will appear to indicate the presence or absence of attachments..

To view a message, click on the SUBJECT or FROM links of the message. From there, you can download pieces of the messages, view the message, and its properties.

The checkbox to the left can be used to select multiple messages, and to perform a function upon them. Currently the only function available is Forward. (You may use the checkbox in the table header to toggle/untoggle all messages currently listed.

You view items on a page by page basis. By default the number of messages displayed in a page is 25, but that can be changed in the Items page. You can move from one page to another by clicking the NEXT and PREVIOUS buttons in the toolbar.

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Exported Items Tab

PDF Export

This function allows you to select many messages, and export them to a single PDF file. This can be extremely convenient for e-discovery and sharing purposes.

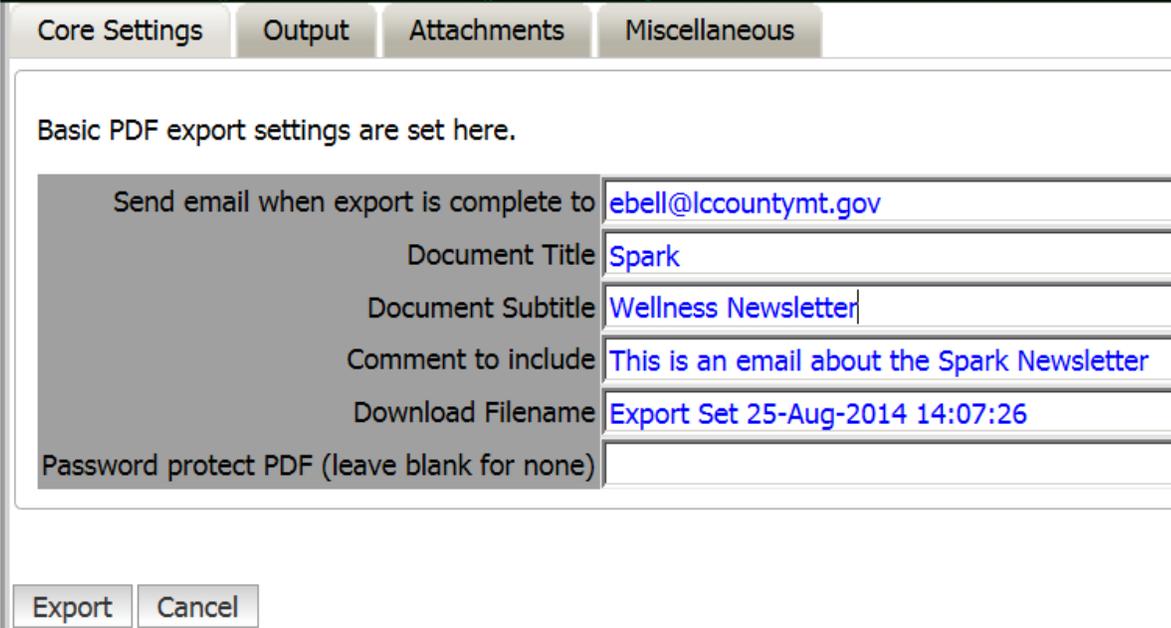
Simply select some messages and click the icon.

You will see a wide variety of configuration options. In brief:

- You may set all sorts of cover page information.
- You may password protect the PDF.
- You may set size limits, and determine what types of attachments, if any, should be included.
- You may customize the headers, and the exported file name.
- You may set the time zone or page dimensions.
- You may request that you be e-mailed when the PDF export job is complete.

After clicking export, the PDF job runs in the background. When it is complete, you may access it from the Exported Items tab.

There are two lists provided. One shows any currently running PDF Export jobs. You may cancel these at any time. The other displays completed PDF export jobs. You may download and/or delete these exports. You may also cancel the job at any time from that tab, and delete old PDF exports.



The screenshot shows a configuration dialog box for PDF export. It has four tabs: Core Settings, Output, Attachments, and Miscellaneous. The Core Settings tab is selected. Below the tabs, there is a heading: "Basic PDF export settings are set here." The settings are as follows:

Send email when export is complete to	ebell@lccountymt.gov
Document Title	Spark
Document Subtitle	Wellness Newsletter
Comment to include	This is an email about the Spark Newsletter
Download Filename	Export Set 25-Aug-2014 14:07:26
Password protect PDF (leave blank for none)	

At the bottom of the dialog, there are two buttons: "Export" and "Cancel".

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Core Settings Output Attachments Miscellaneous

You may optionally include the fields listed below in the exported PDF.

CC	<input checked="" type="checkbox"/>
BCC	<input checked="" type="checkbox"/>
Creation date	<input checked="" type="checkbox"/>
Store date	<input checked="" type="checkbox"/>
Status flags (opened, read, etc.)	<input checked="" type="checkbox"/>
Box type (sent, received, etc.)	<input checked="" type="checkbox"/>
Parent folder	<input checked="" type="checkbox"/>

Export Cancel

Core Settings Output Attachments Miscellaneous

You may restrict which attachments are included and excluded by extension. By default all attachments are included. You may also set the maximum attachment size in MB.

Include attachments with extension

docx Add

xlsx Edit Remove

Exclude attachments with extension

dotx Add

dotx Edit Remove

Maximum size of attachments, in MB (must be less than 2048) 2048

Export potentially dangerous attachments

Export Cancel

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Core Settings | Output | Attachments | Miscellaneous

You may set the page size, or the total PDF size.

Page Size to use	Letter Portrait
Maximum size of PDF in MB (must be less than 2048)	2048
Time Zone	America/Denver

Export Cancel

Browse | Search | **Exported Items** | Tag Definitions | Options

Exported Items

A list of Export jobs is shown below. If you have any running (but not completed) jobs, they will be displayed, and you may request cancellation.

For jobs that have completed, you may download and/or delete the exported file. Please note that the deletion cannot be undone.

Running Jobs:

No Items Found.

Completed Exports:

#	File	Size (KB)	Date	Action
0	Export Set 25-Aug-2014 14:07:26.pdf	34	25-Aug-2014 14:12:58	 

(Be sure to note the date and time if you have more than one export – it may put the newest export at 0 and move the older export down to 1.)

When you click on the Save icon – you will get the option to open or save your PDF Portfolio.

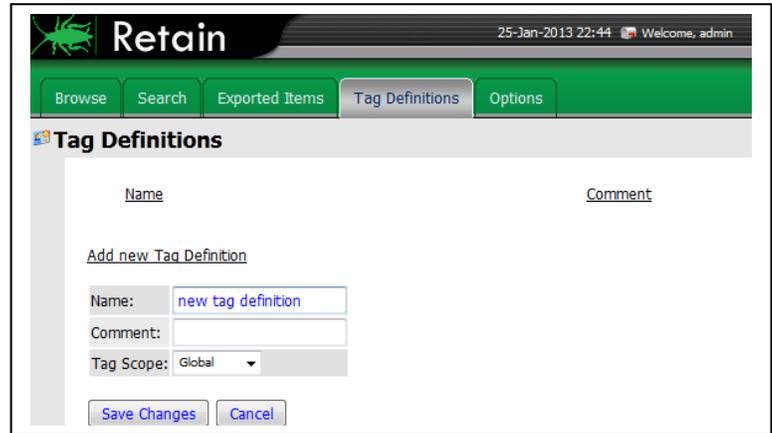
Do you want to open or save **Export Set 25-Aug-2014 14_07_26.pdf** (34.5 KB) from 172.18.4.92?

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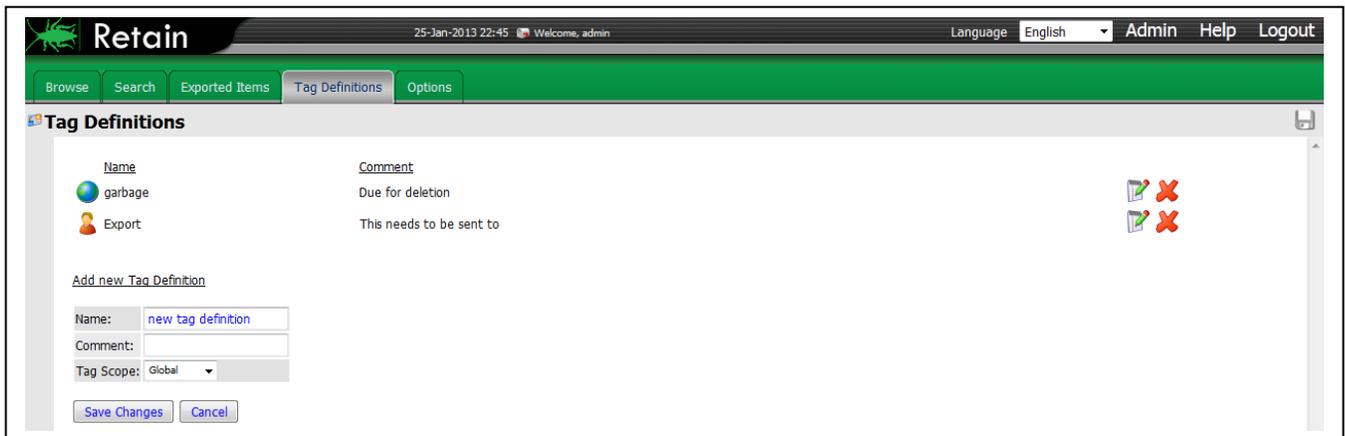
Tag Definitions Tab

The Tag Definitions tab allows the creation and removal of Tags, their automatic comment, and name. Tags are an informative note which can be attached to any data item in the search messages interface. There is no limit to how many tags any one item may have applied to it, and there is no limit to how many tags a user may create. In addition, tags are also a searchable item, making this one of the most versatile ways to add long-term identification for items in the data store.

Before the tag icon will appear on the toolbar in the search interface, there must be at least one tag defined. To define a tag, enter the tag name and initial comment if desired, then, if the user has permissions to do so, define whether the tag is personal or global. Once saved the tag is available for use.



Global tags are tags that any user with the rights to see global tags will be able to view and apply. Personal tags are limited to the user who created them. Only tags visible to users will be available to be searched for by that user.



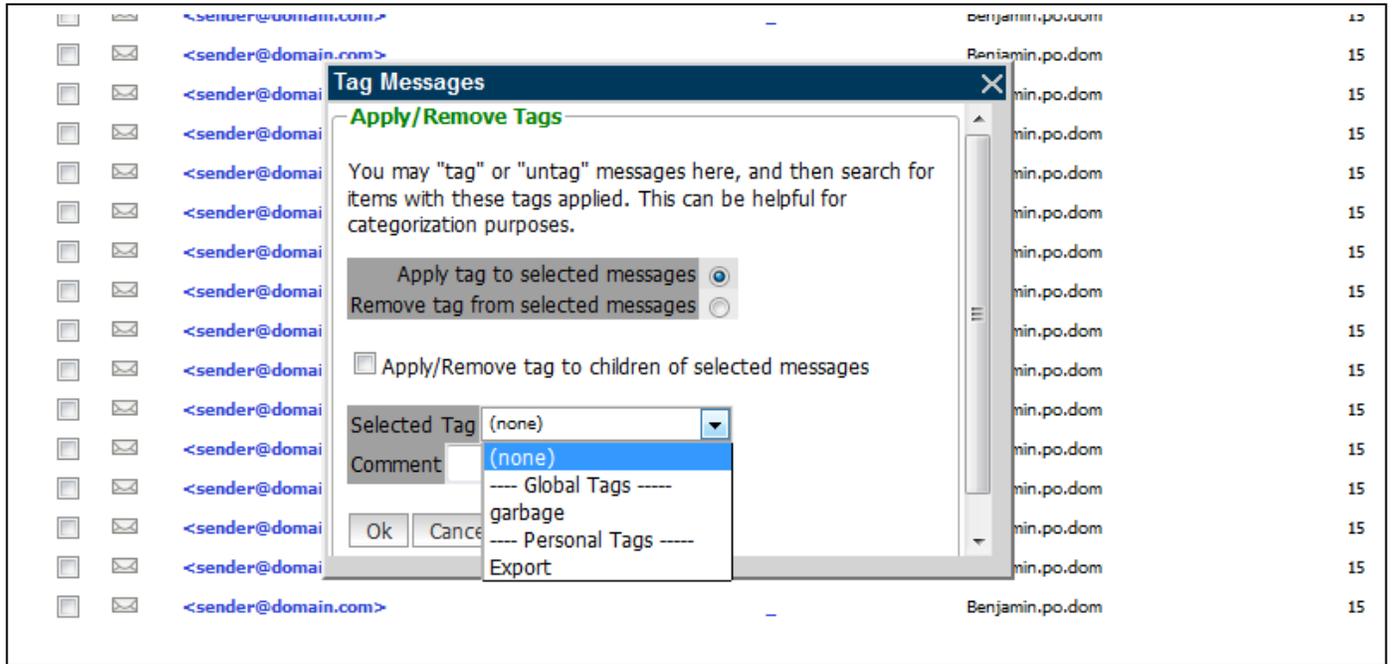
Any tags created or subject to manipulation by the user logged-in will be displayed under this tab.

To apply a tag to a message or data item in the search messages interface, simply select the data item or items, and then click the 'Add / Remove' tag button in the toolbar.



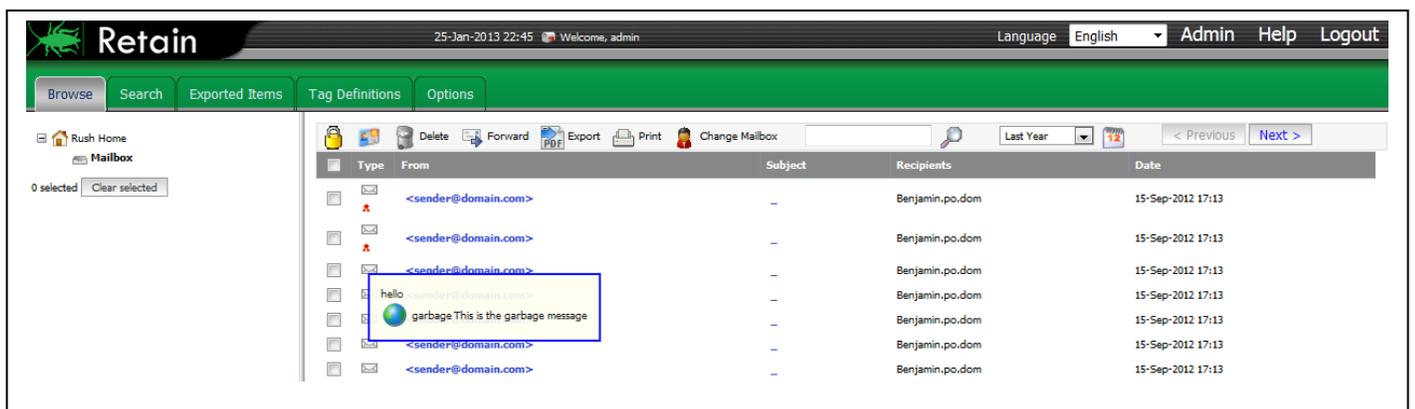
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Once the 'Add / Remove Tags' button has been pressed, the following information box is displayed:



All tags open for use by the user will be displayed, both global and personal. There is no limit to the amount of tags that can be applied to any one message. An additional comment may be added to the tag for the specific item or items selected. In addition, any associated 'children' messages or data items connected to the selected ones, may also be selected for tag application.

Once a message has one or more tags applied to it, a badge is displayed below the item icon in the window.



Hovering over the item's tag badge will display the tag; the global or personal icon along with the name and initial comment.

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Options Tab

This function tab is used to view and change your user account setup. You might use this to change the date and time format, or see what mailboxes you have access to. Most of the tabs, except for the Miscellaneous tab are read-only - you can only view the settings, but not change them. Contact your administrator for more details.

There are four smaller tab that you may click to view information - Core Settings, User Rights, Mailboxes, and Miscellaneous.

If you change any settings, you'll see the SAVE CHANGES disk icon  at the upper right appear. You **must** click on the disk icon to save any changes.

Core Settings

You may view the following information:

- What authentication method is being used to log you into Retain? The normal methods are SOAP (via your GroupWise password) or Offline (via an encrypted password stored in Retain). Both methods are normally tried, unless "Use Exclusively" checkbox is selected. You cannot alter these settings.
- Your Primary UID - This odd looking sequence of numbers and letters corresponds to your unique GroupWise ID. It is used to link you to your primary mailbox in GroupWise, if SOAP authentication is enabled. It is informational only - you'll see it displayed as a column in the *New Mailbox* and *Select Mailbox* pop up windows, if you have access to these features. You cannot change this setting.
- Group Membership - your administrator assigns you to a Group, from which you may inherit additional rights and mailbox access. You cannot change this setting.
- Account does not expire - most accounts are subject to expiration if inactive for a period of time set by the administrator. This checkbox indicates if your account is subject to expiration. You cannot change this setting.
- Change Offline Password - if your administrator lets you change your offline password, you may change it here. Note that the offline password is really only useful if SOAP authentication is disabled.

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User Rights

Displays additional special rights that the administrator may have granted you. Most users have none. That has no effect on your access to your personal mailbox or mailboxes.

User ID EBELL

User Rights

Rights explicitly granted to you, and inherited from your Group membership.

- View/Save attachments
- Export Messages
- Forward Messages
- Print Messages
- Add, edit, remove user tag definitions

Mailboxes

Displays any additional mailboxes (besides your primary GroupWise mailbox) to which the administrator has granted you access.

Miscellaneous

Here you can customize various settings that govern your usage of the Search Interface.

- Comment - if you've been granted rights to Forward Messages by your administrator, this is the default comment appended to the e-mail.

Comment

The default comment appended to forwarded messages can be set here.

Comment

How To Use Gwava Retain Archiving

- Date/Time Format - you can set your own date and time display formats here.

Date/Time Formats

Defines how dates and times are displayed.

Date

Time

Example: 25-Aug-2014 10:51

- Display Number - you can set a number from 25-100, indicating how many items you which to display on a single page. The higher the number, the slower the refresh will be when you are browsing and searching on a slow network connection.

Display Number

How many items to display per page

Display Number

- Message Age Display - Your Retain mailbox is different from your GroupWise mailbox in one very crucial manner - there are many more messages stored in your Retain mailbox. Therefore, both the Browse and Search tabs have a date filter in the toolbar above the message list. This restricts the display to the last few days. You can change the filter here, or in the toolbar - either way, the setting is saved.

Message Age Display

How many days of messages should be displayed by default?

Message Age Display

- Session Timeout - How long is it safe to leave your computer unattended? This setting governs when an inactive session is automatically logged out. You can change the setting and it can range from 5-60 minutes. It is strongly recommended the setting remain less than 20 minutes, for security reasons.

Session Timeout

Time in minutes, to expire an inactive login session.

Time (minutes)

How To Use Gwava Retain Archiving

Notification Center – will open in a new tab



Notification Center

Refresh

Mark All Read

Delete All

When you perform actions such as forwarding, exporting, and restoring, you will receive notification messages here to let you know that the task has completed, and provide some information as to the success or failure of the task.

Today

 PDF: Retain Export Job "Spark" Completed 08:51

 FORWARD: Mail forwarding complete 08:47