QUICK START GUIDE

HYCU Protégé for Office 365

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HYCU

Contents

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HYCU
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1. About HYCU Protégé for Office 365

HYCU Protégé Backup and Archiving for Office 365

HYCU Protégé **Backup and Archiving** for Office 365 is an agentless archiving solution for companies that need to comply with regulatory requirements.

Emails are archived using Envelope Journaling thereby ensuring that all emails are properly archived. Available features include advanced eDiscovery (with an option to filter using 16 attributes), legal hold, customizable retention periods, audit trail, audit review capabilities, tags in addition to granular user access control, file/attachment manager, and advanced reporting via insights.

In the event of legal discovery, audits, and business or personnel investigations, business organizations need to be able to retrieve any relevant email message. Our archiving solution assures that evidentiary-quality records are systematically stored in a central repository with security in place to guard against any form of tampering.

HYCU Protégé Backup for Office 365

HYCU Protégé **Backup** for Office 365 is a simpler solution for users who do not require compliancy tools and journaling backup.

Product Comparison

Feature	HYCU Protégé **Backup and Archiving** for Office 365	HYCU Protégé **Backup** for Office 365
Storage	Unlimited	Unlimited
Pricing based on	Per seat	Per seat
Basic search	Yes	Yes
Add individual email	Yes	Yes
Office 365	Yes	Yes
Microsoft Exchange	Yes	Yes
Delete email account after added	No	Yes
Contacts, calendar, tasks backup for Exchange and Office 365	Yes	Yes
Groups and Teams backup	Yes	Yes

Advanced search	Yes	Yes
Insights	Yes	Yes
Invite email	Yes	Yes
Individual user access	Yes	Yes
Multiple user roles	Yes	Yes
Bulk email add	Yes	Yes
Bulk invite	Yes	Yes
Deactivate email	Yes	Yes
Journaling	**Yes**	No
eDiscovery	**Yes**	No
Alerts	**Yes**	No
Retention policy	**Yes**	No
Legal hold	**Yes**	No
Audit log	**Yes**	No
Review process	**Yes**	No
Tags	**Yes**	No
Data protection officer deletion	**Yes**	No

2. Service pricing

Pricing is based on the number of mailboxes subscribed to and includes unlimited storage and retention.

Features include user access control, file/attachment manager, advanced search and reporting via insights. Insights and relationships give a summary of all emails in sent and received. You can restore, download, or migrate mailboxes or separate emails with just a click of a button. Search of emails can be done on 16 attributes.

For more details on pricing contact your HYCU representative.

3. Subscribing and signing to HYCU Protégé for Office 365

To subscribe to HYCU Protégé for Office 365 contact the HYCU sales team and follow the instructions to subscribe to Office 365 backup.

HYCU creates a login for the administrator and sends an email login information.

You can now sign in as an administrator and add your organization and users to be backed up.

4. Protecting Office 365

Backing up

Preparing for backup

1. Select **Add New Backup** and sign in with Office 365. Use the global admin user for login. Office 365 prompts you for permissions for the Email Backup application. Accept the requested permission.
2. A new non-licensed global admin account is created for backup purposes. The username created starts with `backupadmin`. Copy and save the username and credentials for next steps.
3. The next step is device authorization, where you configure Microsoft Exchange Online Remote PowerShell access with OAuth token:

    a. Copy the user code, open the link provided, and use the backup admin account created in previous steps to sign in to Exchange Online Remote PowerShell.

    b. You need to provide additional security verification (using a mobile app) and enter the generated verification code. If the procedure takes too long, the user code might expire and you need to repeat the previous step after regenerating the user code.

    c. Once logged in, an additional MFA verification of the backup admin is requested.

    d. When you see a message that you have signed in to Microsoft Online Remote PowerShell application on your device, you can close the window.

    After these steps are performed, verification of authorization is done. If the verification fails, the steps have to be repeated.
4. The final step is re-authentication of the backup admin and granting the Email Backup the OAuth token access.
5. Users from the configured organization can now be selected for backup.

    - You can also enable automatic discovery and backup of users.
    - If you want to use auto discovery for a specific Azure AD Group only, please let us know the group name and we will configure your account to only look at users in a specified AD Group.

Backup overview

- As soon as users are added, their emails are backed up. This also includes OneDrive, Contacts, Calendar, and Tasks. SharePoint and Groups & Teams backups are started automatically for the whole organization.
- The storage is configured and provisioned automatically.
- Backup frequency is set by default and you cannot change it:

Item	Backup frequency
Emails	• *12x/day* for Backup • *via journaling* for Backup and archive subscription
OneDrive, Contacts, Calendar, Tasks	*1x/day*
SharePoint, Groups & Teams	*3x/day*

- Retention is unlimited. When using backup and archive subscription you can you can reduce it to best fit your business requirements.
- With the Backup and archive subscription an existing user cannot be removed from backup, backups can only be suspended (using the De-Activate option).

Configuring user access

User management allows the creation of departments and the assigning of users to the departments. Users can be configured to have access to the backups and can be assigned departmental roles.

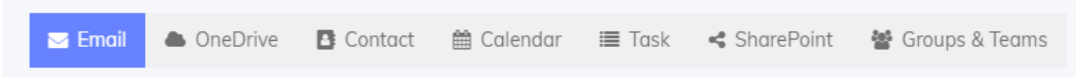
You can add external users, whose emails are not backed up – a useful feature for reviewers.

You can select several access levels - such as admins (Full Admin, Group Admins, IT Admins), users, reviewers, and so on.

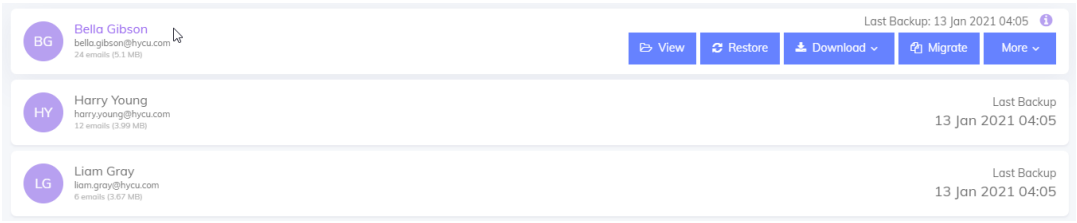
For a complete list of access levels and details on user roles, see Access levels. For details on how to manage users, see Managing users.

Restoring, downloading, and migrating

The dashboard displays items that you can restore or download:



Available actions such as restore or download are displayed when you hover the cursor over the backed up items:



Migrating, restoring and downloading emails

Migrating an archive or backed up mailbox to a new or another account

1. Log in to your account and go to your dashboard.
2. Hover the pointer over the mailbox you wish to migrate *from* and click **Migrate**.
3. Select the date range and the email destination. You can migrate emails to:
    - An existing email account.

      Select the account and the emails are restored to that mailbox.
    - A new email account.

      Select the type of email you want to migrate *to*:
        - Gmail
        - Office 365
        - All others including Microsoft Exchange

          If you email provider is not Google or Office 365, select **Other Email**:

            i. Enter the email address and password of the new account to which you want to migrate the emails to.

            ii. Enter the IMAP details for your destination mail server in the Advanced settings.

            If you do not know the required IMAP settings, contact your email service provider.
4. Click **Start Migrate**.
5. Your email is scheduled for migration. You can check the migration status from the dashboard by selecting **System Status** and then **Migrations**.

Migration notes

- You can migrate multiple email archives to a single email account.
- The original date and time of the emails are preserved in the target email account.
    - Emails in sub-folders such as trash, sent, and similar:

      If the protocol of your email account is *IMAP*, emails are restored into the original folders.

When migrating an account from IMAP to IMAP, the migrated emails are sorted out into sub-folders.

Restoring an email backup or archive

1. Log in to your account and go to the dashboard.
2. Hover the pointer over the mailbox you want to restore and click **Restore**. The restore page opens.
3. Select the date range and the destination. You can select the following destinations:
    - Restore to a default folder

      All message selected are restored to the default folder.

      This option is available for all pages with the Restore button.
    - Restore to an existing folder

      All messages selected are restored to an existing folder.

      Available only for restore from the dashboard page, view list message email account page and preview message email account page.

      The Restore can go to main folder or sub folder.

      Folder sort by alphanumeric ascending.
    - Restore to new folder

      All messages selected are restored to the new folder created.
      This option is available for all email pages with the Restore button.
      When specifying a new folder name, consider the following:
        - The maximum length for the name of the folder is 60 characters.
        - To create a sub-folder, use the ”/" separator.
        - Special characters (`!@#$%^&*()_+-=[]{};':\”`) are not allowed.
        - The used text encoding is UTF-8
        - If a folder already exists, the restore process does not create a new folder but restores directly to the existing folder.
        - All whitespace before and after text is trimmed.

    Select the date range. To restore all your emails in your email account, select **All**. To selectively restore emails, select the start and end date.
5. Click **Start Restore**.
6. You can check the status of your restore by clicking on **System Status** and then **Restores** in your dashboard.

Restoring a folder

The folder structure is replicated in the backups and you can restore emails to them directly. If the folder is deleted, HYCU creates the folder and adds emails there.

1. Log in to your account and go to your dashboard.
2. Select the mailbox to restore and click on the email name.
3. Select the folder.
4. Select the message or click **Select All** to select all messages.
5. Click **Restore**.

Downloading emails

1. Log in to your account and go to the dashboard.
2. Hover the pointer over the mailbox you wish to download.
3. Click **Download** and select **Download as PST** or **Download as EML** from the drop-down menu.

   Downloads are generated as ZIP files. If you select Download as EML, the zip file contains emails as EML files in folder(s). If you select Download as PST, the PST file is generated and compressed.
4. Select the folders you want to download and click **Generate Download**.

   The download link generation process starts, and an email is sent to the you once the download is generated.
5. Once you receive this email, log in back to the dashboard, select **System Status** and then **Download**.
6. You can see the download link there. Click on the link to download the ZIP file.

Restoring an archive / backed up mailbox to a new email account

1. Log in to your account and go to your dashboard.
2. Hover the pointer over the mailbox you want to migrate and click **Migrate**.
3. Select the date range and the destination:
   - You can migrate emails to any existing backup account. In this case simply select the account and the emails are restored to that mailbox.
   - You can also migrate emails to a new email account.
     a. Select the type of account you wish to migrate *to*:
        - Gmail
        - Office 365
        - All others including Microsoft Exchange

     b. If you email provider is not Google or Office 365, select Other Email:
        i. Enter the email address and password of the new account to which you want to migrate the emails to.

ii. Enter the IMAP details in the advance settings.

- You need to enter the advanced settings (preferably IMAP settings) for your destination mail server.
- In case you do not know these IMAP settings, please contact your service provider. In most of the cases your IMAP settings would have been sent to you by your email provider.

4. Click **Start Migrate**.

Your email is scheduled for migration. You can check the migration status from the dashboard by selecting **System Status** and then **Migrations**.

Restoring and downloading Contacts, Calendars, and Tasks

1. Log in to your account and go to your dashboard.
2. Select the **Contacts**, **Calendars**, or **Tasks** tab.
3. Hover the pointer over the user you want to restore or download:
   - If you want to restore or download *all* the contact, calendar or task data for the user:
     a. Click **Restore** or **Download.**
     b. Click **Yes, Continue** to confirm.
   - If you want to restore or download *selected* contacts, calendar items or task data for a user:
     a. Click on the user.
     b. Select the data you want to restore.
     c. Click **Restore** or **Download**.
     d. Click **Yes, Continue** to confirm.
4. You can check the status of your restores or downloads by clicking on **System Status** and then **Restores/Downloads** on your dashboard.

Restoring Contacts, Calendars, and Tasks to a different user

To restore to another user download the data and then upload to the other user's accounts.

Restoring OneDrive

HYCU Protégé for Office 365 supports the restore of the following OneDrive For Business items:

- Restore of the entire User OneDrive, Single Folder or Single File.
- Point in time restore - you can restore a file or folder or the entire drive from a specific backup date.

- Restore of data to the same user's drive or any other user's drive in the same tenant.

To restore OneDrive items, perform the following steps:

1. Log in to your account and go to your dashboard.
2. Select the **OneDrive** tab.
3. Hover the pointer over the user you want to restore.
4. *To restore the entire user's OneDrive data*, click **Restore**.

   On the next page, select the:

   a. Backup date –restores the files and folders as on that date
   b. Destination – you can choose to restore the same user's OneDrive or another users OneDrive in the same tenant.
   c. Restore method:
      - Default restore – restores everything to the same folder from where the data was backed up from.
      - Create a new folder in the user's OneDrive and restore the data there.

   *To restore selected files and folder*s, click on the user whose data you want to restore.

   a. Select the backup and the data to restore.
   Click **Restore**.
   c. Select **Restore Latest Version** to restore the latest version of the backup or **Latest & Previous Versions** to restore all backed up versions.
   d. Select one of the following options:
      - Destination – you can choose to restore the same user's OneDrive or another user's OneDrive in the same tenant.
      - Keep Folder Structure (Default) to restore and maintain the folder structure of the last backup.
      - Create New Folder to create a new folder in the root of user's OneDrive and restore the data there.
5. Click **Start Restore**

   Click **Yes, Continue** to confirm the restore.
6. You can check the status of your restores or downloads by clicking on **System Status** and then **Restores** on your dashboard.

Downloading OneDrive

1. Log in to your account and go to the dashboard.
2. Go to the **OneDrive** tab.
3. Hover the pointer over the user whose OneDrive data you wish to download.
   - To download the *entire user's OneDrive data*, click **Download**.

In the download page, select the backup date – this downloads the files and folders as on that date.

- To download *selected files and folders*, click on the user whose data you want to download.

  a. Select the backup and the data to download.

  b. Click **Download**.

  c. From the drop-down menu, select one of the options:

  - Latest version
  - Latest & previous version

4. Click **Generate Download**.

   Click **Yes, Continue** to confirm.

5. You can check the status of your restores or downloads by clicking on **System Status** and then **Restores** on your dashboard.

Restore SharePoint

For SharePoint Online you can:

- Restore SharePoint Site, subsite, single file folder in SharePoint.
- Do a point in time restore: You can restore data from any previous backup.
- Restore data to the same site or any other site in the same tenant.

1. Log in and go to the dashboard.
2. Go to the **SharePoint** tab.
3. Hover the pointer over the site you want to restore.
   - To restore the entire site, click **Restore**.

     On the next page, select the:

     - Backup date – restore the site as on that date
     - Backup time – as a backup is preformed three times a day for SharePoint, select one of the backups from that day.
   - To restore subsites, expand the main site and click **Restore** for the sub site.

     On the next page select:

     a. Backup date – restore the site as on that date
     b. Backup time – as backup is preformed three times a day for SharePoint, select one of the backups from that day.
     c. Destination – you can choose to restore to the same main site or any other site in the same tenant.
     d. Restore method:

        - **Keep folder structure** – restore everything by following the path and folder structure from the latest backup.
        - **Restore to new folder**: Create new folder in the root of the selected site and restore the data there.

- To restore selected folders and files in a sub-site click on the sub-subsite and open it.

  Select the files and folders and click **Restore**. Choose to restore the selected version or selected and previous versions.

  Select the restore options:

    - **Destination** – you can choose to restore to the same main site or any other site in the same.
    - **Restore method**
      - Keep Folder Structure (Default) – restore everything by maintaining the path and folder structure based on the latest backup.
      - Restore to new folder: Create a new folder on the root level of destination and restore the data there.

4. Click **Start Restore**.

   Click **Yes, Continue** to confirm.

5. You can check the status of your restores or downloads by selecting **System Status** and then **Restores** on your dashboard.

Download SharePoint

1. Log in and go to the dashboard.
2. Select the **SharePoint** tab.
3. Hover the pointer over the site you want to download.
4. Select the items to download.
   - To download the entire site, click **Download**.

     In the Download screen, select the:

     a. Date – download the site as on that date.
     b. Time – Since we do 3 backups a days for SharePoint, select the version that you want to download on the backup date.
     c. Subsites to be downloaded.

   - To download only one subsite expand the main site and click **Download** for the sub site.

     In the download screen, select the:

     a. Backup date – download the site as on that date

b. Backup time – as backup is preformed three times a day for SharePoint, select one of the backups from that day.

- To download selected folders and files in a sub-site click on the sub-subsite and open it.

5. Select the files and folders and click **Download**. Select the versions to be restored.
6. Click **Generate Download**.

   Click **Yes, Continue** to confirm.
7. You can check the status of your downloads by clicking on **System Status** and then **Downloads** on your dashboard.

Downloading Groups and Teams

1. Log in and go to your dashboard.
2. Select the **Groups and Teams** tab. Expand the site and reveal all the groups.
3. Expand the Groups to access the different Teams items.
4. Click **Download**.
5. Select the items to download. The following items have additional options:
   - Team *chats* can be downloaded as EML, CSV, or PDF files.
   - *Mailboxes* can be downloaded as EML or PST files.

   Select the appropriate format from the Download drop-down list.
6. Click **Next**.
7. In the download screen, select the:
   a. Backup date – download the data as on that date
   b. Backup time – as backup is preformed three times a day for Teams, select one of the backups from that day.
8. Click **Generate Download** and then click **Yes, Continue** to confirm.

5. Performing common tasks

Managing users

Access levels

HYCU Protégé Backup for Office 365 provides the following access levels:

- **Full Admin**: Has complete access and all capabilities. They can view, download, restore, migrate, and search emails from all email accounts. They can also set user permissions, compliance policies, and view logs, set legal holds, and set up review processes.

- **Group Admin**: They have complete access for the departments for which they are admins. They can view, download, restore, migrate, search emails from all email account within their allotted department. They can also set user permissions, compliance policies, and view logs, set legal holds, and set up review processes.
- **IT Admin**: They can only add email, edit email, delete email, deactivate email, and set up user permissions. They can restore, download, or migrate any one's email in the company. They cannot view the content of any email but can view the metadata (header, subject, from, to fields) of an email. They also can set up compliance policies.
- **End User**: They can only view, download, restore, migrate, and search their own emails and no one else's email account. They cannot access the compliance tab.
- **User Read Only**: They can only view, restore and search their emails and no one else's email account. They cannot access the compliance tab and cannot download or migrate emails.

The following access levels are available only for HYCU Protégé Backup and Archiving for Office 365:

- **Compliance and Review Officer**: They only have access to eDiscovery Search, Alerts, View Audit Logs, Retention policy, Legal Hold and Review Process tabs.
- **Reviewer:** They only have access to Review Process tab where they can review emails. They are able to review *all* review processes. They are not able to set up a review process. The account owner, full admin, or compliance officer have to set these up for the reviewers.
- **Limited Reviewer**: They can only access granted saved search in Review process, there are three ways to grant permission for review process to a user.
- **Data Protection Officer**: They have access to entire compliance tab and can *delete emails via eDiscovery.*

Managing user access

1. Log in to your account.
2. Select **User Management**.
3. Select **Grant Permission.**
4. Select the user and assign the role from the drop-down menu.
5. For Group admins, select the department for which they are admins.
6. Click **Save Changes**.

Enabling and disabling the login of an internal user

To enable or disable login of an internal user whose email is backed up;

1. Log in to your dashboard.
2. Go to **User management**.
3. Select the **Grant Permission**.

4. In the Grant Permission page, enable or disable the login of the user by clicking on the Login Status switch.

Enable O365 Azure Active Directory Single Sign On access to dashboard for users

You can now enable O365 Azure Active Directory Single Sign On, which enables the users to log in to their backup dashboard using their O365 credentials. This way they do not have to keep a separate password for the backup portal.

1. Log in to your dashboard.
2. Go to **User management**.
3. Select **Grant Permission**.
4. In the Grant Permission page, enable the login of the user by clicking on the Login Status switch.

   Enable the **Enforce Azure AD SSO Log in** access for all users. Once enabled for all users, as soon as their access is enabled in the above step, users need to use their O365 credentials to log in to their backup dashboard.

   You can disable the user login on the same page.

Enabling access for external users (Delegated Users)

You can add users who can access your backups without the need to back them up. For example, you can grant access to your backup to an external auditor. Consider the following:

- Only admins who have access to the user management page can enable access to external users tab.
- They create a user on backup portal and HYCU invites them to log in to the portal.

To enable access for external users:

1. Log in to the dashboard.
2. Click **User management** to open the user management page.
3. Open **Grant Permission**.
4. Click **Add user**.
5. Enter the email of the user you want to invite.
6. Select the role of the user.
7. Check the box **I agree with this Term** and click **Invite**.

   Note that once you click Invite, an email with the link to login and reset the password is sent to the user. *This link expires in 24 hours*.
8. You can check whether the user has accepted it on the **Invitation List** tab:

If the user did not get the email or if the invitation expired, then you can resend the invitation. Right-click the status and select **Resend** from the drop-down menu. To cancel the invitation, select **Cancel**.

> ⚠ Important *You are granting an external user access to the portal*. Depending on the selected role, the user might be able to see your data. Additionally, only the account owner, full admin, and the IT admin can enable and disable this access. Creating this access does not mean HYCU is backing up the user's data. The user has only access to the backups. You can also add the same user in another subscription.

9. Once the user accepts the invitation and logs in, he /she is added to the user list on the grant permissions tab.

   You can send the password reset link again if necessary.

   The user type is marked with colored band on the left of the user card: *orange* for delegated users and *blue* for backup users.

> Note
> - You cannot transfer ownership to a delegated user.
> - Every user's activity regarding delegated users is recorded in the audit log.
> - A revoked permission to review process for a "Limited Reviewer" is handled by displaying an error notification.
> - *You cannot delete a delegated user. You can only revoke his access.*

Assigning users to departments

1. Log in and go to the dashboard.
2. Click on **User Management** to display a list of users.
3. If you do not have any departments yet or the department is missing, click on **Department Management** to add it.

   Enter the name and click **Add More**.

   Click **Save Changes and** go back to the User Management page.
4. On the Grant Permission page, assign one or multiple departments to the user.
5. Click **Save Changes**.

Managing licenses

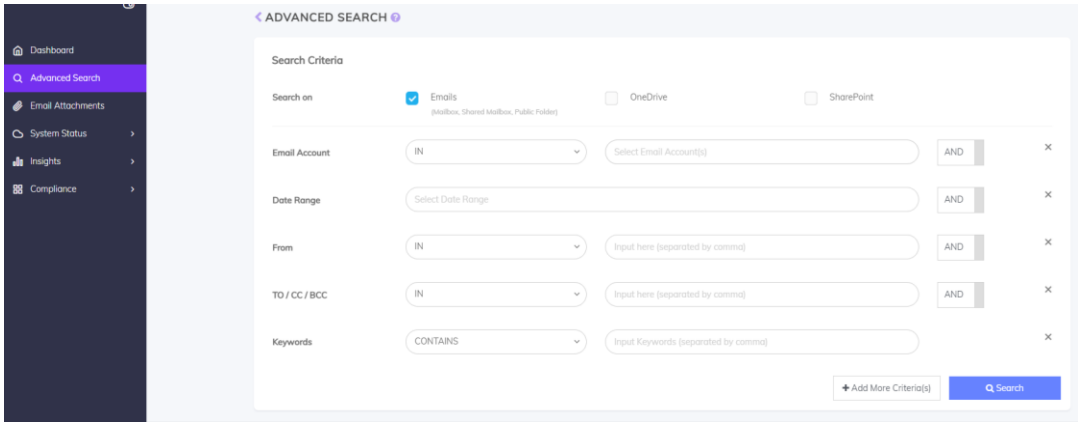
- Licenses are counted per seat.
- With HYCU Protégé Backup for Office 365, the user *can be removed* and the seat is reclaimed.
- With HYCU Protégé Backup and Archiving for Office 365, the user *can only be deactivated*:
  - Due to compliancy, data is retained; emails can be removed if retention is shortened, but OneDrive, Contacts, Calendars, and Tasks are retained.

- On top of licensed seats an additional 20% of seats can be deactivated without additional licensing – if you exceed this number you need additional seat licenses.

Advanced search

You can use advanced search to locate emails, OneDrive files, or SharePoint items of interest.

1. To open the Advanced Search page, select **Advanced Search** in the side menu.



2. Select the search area (emails, OneDrive, ...).

   If the default search properties do not cover your search (for example, you want to search the email body and similar), you can add additional search properties as well as remove them.

   Click **+Add More Criteria(s)** and select the additional search criteria.

   Separate multiple keywords by comma. Combine search criteria from top to bottom:

   ```
   ((criteria1 operator1 criteria2) operator2 criteria3)
   ```

   > Example:
   >
   > ```
   > (to “finance” OR to “approvers) AND subject contains “contract, agreement”
   > ```

   Emails with To containing “finance” or “approvers” and subject containing either “contract” or “agreement”.

   Some search examples

   - Search Internal Emails - emails that are sent within company only

     ```
     To / CC / BCC Only IN @domain.com AND

     From Only IN @domain.com
     ```

   - Search External Emails - to emails that are distributed outside the company

     ```
     To / CC / BCC Not IN @domain.com OR

     From Not IN @domain.com
     ```

- Inbound Emails - emails that are received by the company

  ```
  Folder Not IN Sent Items
  ```

- Outbound emails - emails that are sent by the company employees

  ```
  Folder IN Sent Items
  ```

3. Click **Search** to start the search.

6. Insights

The **Insights** section shows insights based on backed up emails. You can view:

- relationships
- email volume and storage, most frequently contacted account, and attachment types
- how often during work emails are sent, how fast they are responded to, the most active email users

> Note On request, insights can be disabled.

Relationships in insight displays sent or received email relationships between users.

Statistics displays email volume and used storage. Top contacts and attachment types are also listed.

Productivity displays productivity information as seen from emails, from sending emails, response times, to top email users.

7. Compliance

The Compliance section is available only for HYCU Protégé Backup and Archiving and offers the following compliancy related tools:

- Auditing
- Selectable retention settings
- Legal hold
- Discovery, alerts, tags based on search
- Review process

eDiscovery

eDiscovery is based on email advanced search. For details on advanced search, see Advanced search.

eDiscovery expands the advanced search with *alerts*, *tags*, and a *review process* on the results:

- You can apply tags to search results, including saved ones
- Mark the results for review
- You can run the search run daily and the results are sent by email as alerts

Creating an eDiscovery

1. Log in to your dashboard.
2. Select **Compliance** and then **eDiscovery**.
3. If the default search properties do not cover your search (for example, you want to search the email body and similar), you can add additional search properties as well as remove them.

   Click **+Add More Criteria(s)** and select the additional search criteria.

   For an example, see Advanced search.
4. After setting the criteria, enter a name for the search. Consider the following limitations:
   - A maximum 35 characters are allowed.
   - The name can contain only letters (a-z or A-Z) and/or numbers (0-9). No other special characters are allowed, except the currency symbols and the underscore ("_").
5. Click **Save**. Any criteria and the search are saved and accessible under the Saved Search tab.

Viewing, tagging, and marking the search results for review

1. Once you saved an eDiscovery Search, select the **Saved Search** tab.
2. A list of saved searches is displayed. The most recent search that you created in an eDiscovery search is at the top of list.
3. Select the search and select an action for it:
   - **View**
     Select the item for viewing:
     - **View Emails**
       The View Emails page opens and allows you to preview emails one by one.
       You can also download, restore, or migrate emails and add or remove tags to search results.
     - **View & Edit Criteria**
       The View & Edit Criteria page opens, which allows you to view or edit the search criteria.
       After editing the criteria, click **Update**.
   - **Tag**
     Select **Add tag** from the drop-down list to be applied to all search results.
   - **Mark for review**

All the search results emails will be marked for review. See Creating a Review Process for details.

Retention policy

Consider the following when defining your retention policy:

- By default, backups are kept forever.
- The retention policy can be set to one of the predefined periods.
- The Retention time is calculated from the email date, *not* the backup date.
- Retention policy can be defined on the email account, department or all email accounts
- Retention period can be selected for the policy
- Retention can be defined on the Message level
- On the Message level the saved eDiscovery Search can be selected and the desired retention period set for matching messages.

Creating a retention policy

1. Select **Compliance** and then **Retention Policy**.
2. Select **Create New** to open the Create New page.
3. Enter the policy name. Consider the following limitations for the policy names:
    - A maximum 35 characters are allowed.
    - The name can contain only letters (a-z or A-Z) and/or numbers (0-9). No other special characters are allowed, except the currency symbols and the underscore (“_”).

    Select the scope of the policy:

    - **Email Account**

      Enter one or more email accounts.
    - **Department**

      Enter one or more department names.
    - **All**

      All email accounts are selected.

    Select the retention period for the retention policy. The retention period options are: 6 months, **1** to **10** years and Unlimited. Unlimited prevents automatic deletion of emails.
4. Click **Save**. The saved policy is listed in the Retention Policy List.

Legal hold

The legal hold functionality allows emails to be marked for legal hold, preventing their deletion (until legal hold is removed).

> Note Emails are retained indefinitely once placed on legal hold, superseding any previously set retention policies. **Emails under legal hold cannot be deleted by any retention policy until the legal hold is removed.**

You can define legal hold for:

- email accounts
- departments (applied to all accounts of the department)
- all email accounts

The legal hold can be defined at the Message level and saved eDiscovery Search can be selected to apply legal hold to results.

Creating a legal hold

To create a legal hold:

1. Select **Compliance** and then **Legal Hold**.
2. Select **Create New** to open the Create New page.
3. Enter a name for the legal hold. Consider the following limitations:
    - A maximum 35 characters are allowed.
    - The name can contain only letters (a-z or A-Z) and/or numbers (0-9). No other special characters are allowed, except the currency symbols and the underscore (“_”).
4. Select the scope of the legal hold:
    - **Email Account**

      Enter one or more email accounts.
    - **Department**

      Enter one or more department names.
    - **All**

      All email accounts are selected.
5. Click **Enable Hold**. The legal hold is saved and you can view it under the Legal Hold List.

Access to legal hold

The following admins and users have access to legal hold:

- All Admins (Full Admin, Group Admin, and IT Admin)

- Compliance Reviewer(s).

Audit log

Audit log can be used to audit operations:

- Email view, restore, download, or review actions
- User configuration, compliancy options
- System notifications
- List options can be used to perform a more granular search of logs

Creating an audit log

1. Select **Compliance** and then **Audit Log**.
2. Select the activity:
    - **Messages & File Audit Log**

      Select a date dange, a specific user for whom you want to see logs, or enter the Archive Message ID of the email if you want to just see the logs for a message.
    - **User Activity Log**

      Select a date range, a specific user for whose logs you want to see, or enter the Object Name (email account) if you want to just see the logs for that object.
    - **System Activity Log**

      Select a Date Range or a specific user for whose logs you want to see.
3. Click **Search**.
4. The audit log is displayed below.

Downloading an audit log

1. Click on **Download** to download the logs
2. You can download the audit log file in the CSV or PDF format.
3. The selected file is generated and added into your Download List.
4. Once the file is ready, a download link is provided. The link expires within 24 (twenty-four) hours.

Access to audit logs

The following admins and users have access to audit logs:

- Full Admin and Group Admin
- All Reviewers.

Review process

A review process uses saved eDiscovery Search to mark emails for review or review and deletion.

A reviewer can see the emails for review and perform the following actions:

- Remove the review status
- Add retention policy
- Add legal hold

Creating a Review Process

Prerequisite

- Before you create the review process, you must create an eDiscovery search and save it.

> Tip Use filters to reduce the number of emails in the saved search. A huge number of emails (for example above 100000) significantly slows down the creation process.

Procedure

1. Select **Compliance,** then **eDiscovery** and then **Saved Search**.
2. Select the saved search and select **Mark for Review.** Select the review option:
    - **Mark for review**

      The emails are marked for review.
    - **Mark for Review & Deletion (DPO)**

      The emails are marked for deletion by the Data Protection Officer (DPO).

      The DPO can later on review and delete emails, but must provide the deletion reason that is added to the audit logs for compliance reasons.

      Once emails are deleted, they cannot be recovered.

      > Note Emails on legal hold cannot be deleted by the DPO.
3. Select **Create**.
4. Once you create the review process, you are directed to the Review process page. The most recent Review Process is added to the top of the list, with a same name as that of the eDiscovery Saved Search. Note that review process preparation may take some time.

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