

# Email Archiving Quick Setup Guide

## It's as simple as 1, 2, 3...

This email archiving setup guide provides you with easy to follow instructions on how to setup your new archiving service as well as how to create archiving users and assign archiving privileges.

### Please Read Before You Begin:

If you wish to use our hosted Exchange and email archiving service, please create your hosted Exchange mailboxes first and then enable the archiving service. This quick setup guide should be used to enable our hosted email archiving service only.

# 1 Enable Your Archiving Service

- A. Log into your new control panel at <https://cp.mindshiftonline.com/login> using the email address and password included in the welcome email you should have already received. You can use your online control panel to add, change, or delete users or to change other company settings.
- B. Once logged into your control panel, click the **Archiving** button in the left hand navigation bar.



- C. Next, select the type of archiving service your company will be using - personal, basic or compliant. Then, please complete the billing information.

**Archiving for Compliance:**

Email archiving is required for most public and private companies. It helps companies meet corporate, legal and regulatory requirements as well as accelerate legal discovery, protect critical business information and shrink the cost of storage and backup windows. This version of archiving will help your company maintain compliance with various regulatory bodies. Personal archiving access is available.

**Basic Archiving:**

This option is best suited for companies that need quick and easy visibility into all employee emails, but do not require compliance. Personal archiving access is available.

**Personal Archiving:**

This option is best suited for companies that only need to archive individual mailboxes. This option does not include the ability to search across all company email.

Fees apply for any of the above services

Migrating your existing archive? Please contact Customer Service:  
Phone: 855-535-7262  
Email: support@mindshift.com

Please enter your billing information

Bill To

Select Credit Card Owner: \*

Billing Address

We will NOT charge your card until your 30 day trial has ended. Billing information is requested only to ensure customer data is valid.

Address 1: \*

City: \*

State: \*

Zip: \*

Country: \*

Billing Information

  

Credit Card Number: \*  [?]

Expiration Date: \*  /

Card Security Code: \*  [?]

It's easy to [cancel](#)

D. Then, follow the instructions to forward all of your email to the address listed on your screen.

## Manage Archiving

[Click here](#) to manage your archive

Currently Enabled: **Compliance Archiving**

Note: You will need to complete the following steps in order to activate your archive:

**1. Forward all company mail to this address:**

2976f3c2-aa58-11e1-8b31-12313d066ab1@arch.mindshift.com

**2. Add Users:**

You have three options to add Archiving Users.

- Select 'Add new Archiving User: Single' from the [User List](#).
- Enable Archiving for existing Users: [Click Here](#).
- Use our bulk import tool to upload your users: [Click Here](#).

**3. Assign search privileges:**

Although mail for all users will be archived, only users you designate will be allowed to access the archived mail. You may also assign individual access per user to their personal mail archive from this page.

To assign user privileges:

- [Click here](#) to view all users.
- In the 'Actions' dropdown, select 'Archive Settings'.
- Assign user privileges.

Once privileges have been assigned, users can login to the archive with their credentials (email address and password).

Have questions about your archiving service? Please visit the Archiving section of our [custom support center](#)

Would you like to disable your archiving service?

[Disable](#)

## Create Archiving Users

You will need to create an archiving user in the system for each archived mailbox. You have three options for creating archiving users :

- Add new users individually
- Add hosted archiving to the services activated for existing users
- Add new users in bulk

A. To add new users individually:

- Select **“Add new Archiving User: Single”** from the **Actions for “your company”** menu at the bottom of the Users page.
- Enter the required fields and click **“Save Changes”** to create the new user.

B. To add hosted archiving to the services activated for existing users:

- On the **“Manage Archiving”** page, click the link in section 2.B – Enable Archiving for Existing Users.
- Select the users for whom you would like to enable archiving.

C. To add new users in bulk using the bulk import tool:

- On the “**Manage Archiving**” page, click the link in section 2.C – Bulk Import Users – and download the bulk import spreadsheet.
- Add users to the spreadsheet and save it on your local machine.
- From the “**Bulk Import Users**” page, use the browse button to locate the spreadsheet and upload it to the site.

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### 1. Forward all company mail to this address:

2976f3c2-aa58-11e1-8b31-12313d066ab1@arch.mindshift.com

### 2. Add Users:

You have three options to add Archiving Users.

- a. Select 'Add new Archiving User: Single' from the [User List](#).
- b. Enable Archiving for existing Users: [Click Here](#).
- c. Use our bulk import tool to upload your users: [Click Here](#).

### 3. Assign search privileges:

Although mail for all users will be archived, only users you designate will be allowed to access the archived mail. You may also assign individual access per user to their personal mail archive from this page.

To assign user privileges:

- a. [Click here](#) to view all users.
- b. In the 'Actions' dropdown, select 'Archive Settings'.
- c. Assign user privileges.

Once privileges have been assigned, users can login to the archive with their credentials (email address and password).

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## 3

# Assign Archiving Privileges

- A. Although the mail from all users will be archived, only the users you designate will be allowed to access the global mail archive. You can either assign archiving privileges to existing archiving users or create new archiving users and then assign privileges to them.
- To assign user privileges, click **“users”** from the left hand navigation bar to access the users’ page.
  - In the **Actions** dropdown list, select **“Archive Settings.”**
  - Assign user privileges.

**User List**

Search by:  Search Text:

Filters:

Name ▲▼	Primary E-Mail▲▼	Type	Admin	Actions
<a href="#">test_account</a>	testaccount@dl01Corp.com sh11.lan\dl01Corp.testaccount		<input checked="" type="checkbox"/>	<b>test account</b> <input type="button" value="X"/> <ul style="list-style-type: none"> <li>General Settings</li> <li>Advanced Settings</li> <li>BlackBerry</li> <li>ActiveSync</li> <li><b>Archiving Settings</b></li> <li>Distribution List</li> <li>Change Password</li> <li>Convert to Resource Mailbox</li> <li>Outlook Setup</li> <li>Answer Center</li> <li>Delete</li> <li>Sharepoint Enable</li> </ul>

**Actions for dl01Corp**

- ▶ Add MS Exchange Users: [Single \(recommended\)](#) | [Multiple](#)
- ▶ Add External Contact : [Single](#)
- ▶ Add Resource Mailbox : [Single](#)
- ▶ Add Control Panel Only Administrators  : [Single](#)
- ▶ Add Other Users: | [SharePoint](#)

**Manage User Archiving Settings**

Firstname:   
 Lastname:   
 Email:

**Company-Level Privileges:**

No Search Privilege

Search User - Search Users can execute searches created by Admins

Search Admin - Search Admin can create new searches, manage search settings, and execute searches

Search Admin PLUS - An enhanced Search Admin role that allows access to Reports and Policies in addition to having all Search Admin privileges

**Personal Archive Privileges:**

Personal Archive User - Personal Archive Users can access their own message archive but cannot search across all company emails. This option can be assigned independently of admin privileges. Per user fees apply.

Send welcome email

You may also wish to assign personal archive access independently (per user) via the control panel. This will allow users to view their own personal archive. Please note that additional fees apply for this service. When privileges have been assigned, users can login to the archive portal with their credentials (Email address and password).

**Remember:** You can always access a more detailed set of setup instructions from within your control panel by clicking on the **Help** button in the left hand navigation. Our Technical Support Team is also here 24x7x365 to walk you through the setup process or answer any questions you may have. We can be reached by phone at 855-535-7262 and by email at support@mindshift.com