Spirion: How is Email Searched?

Scope: SO,CCC	Revision Date: 12/13/2018

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1. Introduction

Determining exactly what is searched during an Email search depends both on settings in the Spirion client and how Outlook is configured. Such as: Is Outlook open? Do you still have Outlook Data Files (*.pst)? How much of your cloud mailbox are you syncing to your local computer? Have you customized the search settings for E-mail? Have you configured it to search only certain Outlook folders? What do you have in your ignore list?

Because the answer to how email is searched depends on your current setup – this document attempts to explain how email is searched based on different ways you may have it configured.

2. Intended Audience

The intended audience for this procedure is:

- System Office and CCC

3. What you need to know about Outlook Data Files (*.pst files)

Before we migrated to O365 for mail, you may have created Outlook Data Files to archive mail out of your mailbox to a file that is stored on your local workstation. The file – a *.pst file – could be opened in your Outlook profile and you could access mail in it without having to store that mail in your mailbox. You could attach/open that *.pst file from your Outlook profile, access mail in it and then close/detach it from your Outlook profile at any time.

Mail in a locally stored *.pst file can only be accessed from that local workstation making it a less desirable place to store mail:

- these locally stored *.pst files could be large and could be taking up valuable space on your local workstation.
- storing of Outlook Data Files (*.pst) in O365 OneDrive is not allowed.
- Storing of Outlook Data Files (*.pst) in

Now that we have migrated to O365, you no longer need to nor should archive mail out of your O365 mailbox and should import any mail you had stored in a *.pst file **that you need to or want to keep** either into your O365 mailbox or into the CSCU Protective Enclave where required:

- Remember to apply any record management requirements for email referring to the separate document: Retaining Email that walks you through how to properly retain email in the Protective Enclave.
- Refer to the CSCU Protective Enclave for more information about DCL3 data.
- Refer to this procedure for how to import mail from an Outlook Data File (*.pst) into your O365 mailbox.

4. Procedure

Use the following questions to determine how email will be searched during a Spirion search.

How much of your O35 mailbox are you syncing to your local workstation?

Spirion will only search the portion of your O365 mailbox that you are syncing locally to your workstation. To check how much your workstation is configured to store locally, from Outlook 2016, click File – Account Settings, Account Settings…:
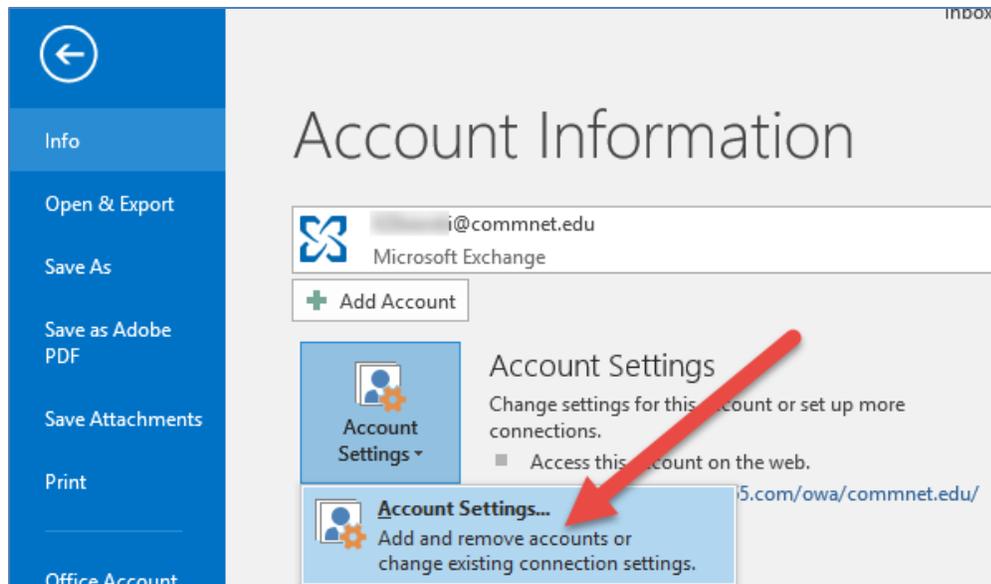
Then change to the E-mail tab and double click your account to see how much mail is stored locally on your workstation:
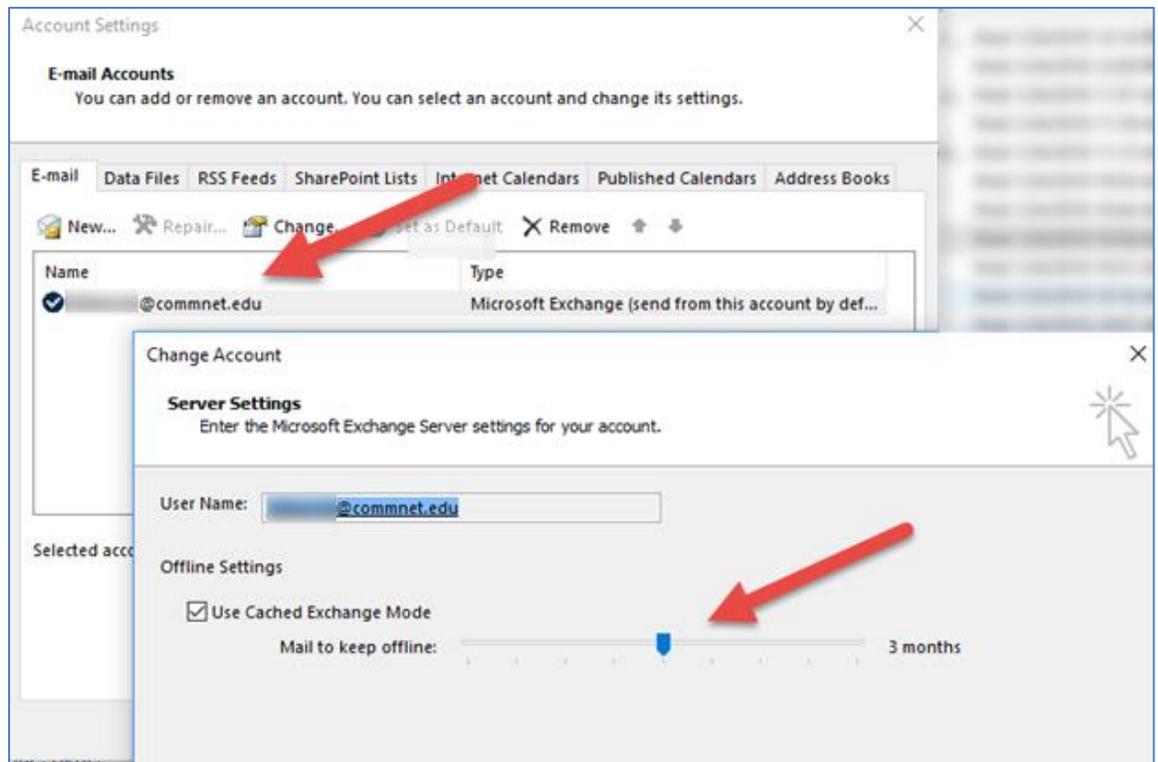

For example, if you have 3 years worth of email in your O365 mailbox, only 3 months of it will be searched using a Spirion search if this is set to 3 months. Spirion client will not search email in your O365 mailbox that is not kept offline (i.e on your workstation).
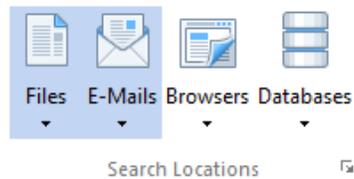
In the Spirion client, on the Locations tab, is the "E-Mails" search location enabled?

Email is only searched if the "E-Mails" search location is enabled.

NOTE: If the location you are searching contains Outlook Data Files (*.pst files), they will not be searched if the E-Mails search location is not enabled for the search.
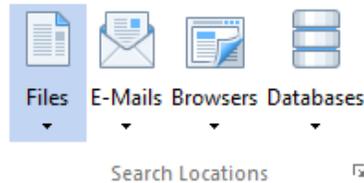
➢ **Email will not be searched:**

➢ **Email will be searched:**

Is Outlook open or closed at the time the search begins?

Even if Outlook is closed, your email may still be searched, but only if your account in Outlook is configured to use **Cached Exchange Mode** when it connects to the Exchange server. This is configured by your Exchange Admin.

➢ If Outlook is **closed** at the time you perform your search and you are **not** using **Cached Exchange Mode**, email **will NOT** be searched.

➢ If Outlook is **closed** at the time you perform your search and you are using **Cached Exchange Mode**, email may be (not necessarily "will be" see NOTE below) searched because it will search an offline cache of your mailbox (from the last time you connected to the server) that is stored on your workstation.

NOTE: If you customized email search settings in the Spirion client that causes it not to search your email, it may not perform an email search. See the next section for information on how customization to the email search settings could cause your email not to be searched even though Outlook is open and you have "E-Mails" search location enabled.

Have you made custom E-Mail settings?

Even if the "E-Mails" search location is enabled on the Locations tab, you have the ability to change the E-Mail search settings to perform different actions when an Email search is performed. **Any changes that are made to the email search settings are saved in your profile and continue to be used unless you change them back**. Keep this in mind if you have ever customized the Email settings:

In the Customize E-Mail Settings section, "Search Exchange and Outlook profiles" is enabled by default. This is what causes the E-Mail search to search your Exchange inbox:
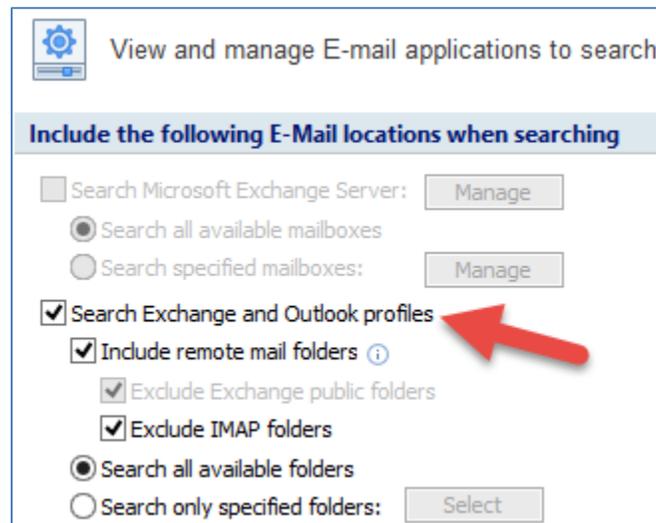

When it is enabled, there is an additional sub-setting that you can disable that will exclude remote mail folders (i.e. your O365 mailbox). You may do this if you only wanted to search Outlook Data Files and not search your mailbox for instance:
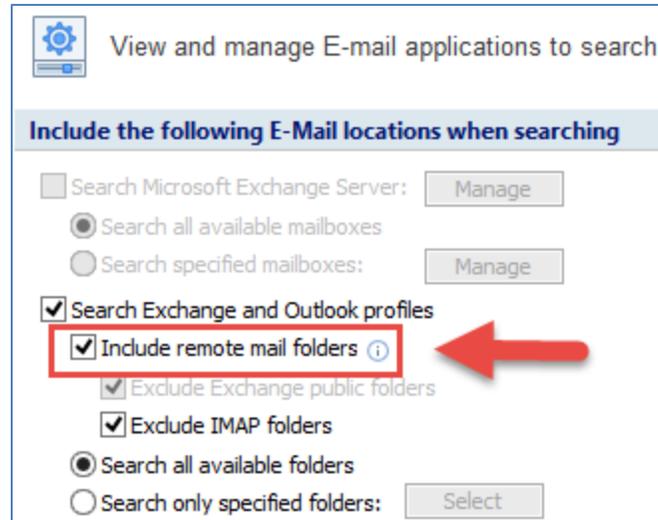
➢ If "Include remote mail folders" is enabled (the default); then your mailbox will be searched.

➢ If "Include remote mail folders" has been disabled, then your mailbox **will NOT** be searched.

NOTE: When searching "Exchange and Outlook profile", you can search all available folders by keeping the default selection of "Search all available folders" or you can select specific folders by clicking "Search only specified folders" and use the Search button to select the folder(s) to search:
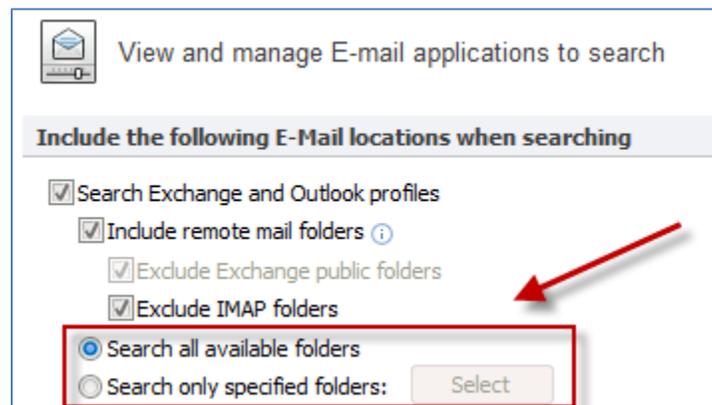
If you have, "Search only specified folders" selected, click Select and scroll through the folders to select or de-select which folders you want to search. You would need to customize your email search settings using this method if you managed someone else's mailbox in your Outlook profile. Otherwise, when you performed an email search, it would also search other mailboxes you access in

your Outlook profile. You would need to do this each time you ran an Email search as new folders created after the last time you searched will be included in the search and will need to be excluded.

Have custom E-Mail settings been made that changes how additional Outlook Data files (*.pst) are searched?

Another custom E-mail setting you can make is to change how Outlook Data files (*.pst) are searched. This was a common thing to do when we were creating Outlook Data Files (*.pst) that now may not be needed now that we have migrated to O365 and may no longer have Outlook Data Files (*.pst) around.

Remember that any customized E-mail settings are saved in your profile and continue to be used unless you change them back. Keep this in mind if you have ever customized the Email settings:


On the custom settings for "E-Mails", "Search additional Outlook PST data files" is set to "Whenever located in specified file locations (even when file search is off)" by default:
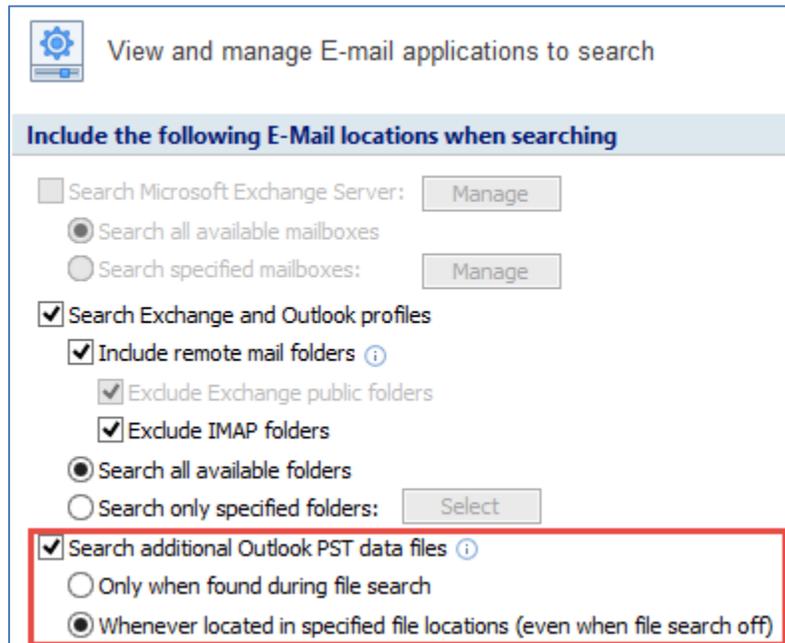
Even if the "E-Mails" search location is enabled on the Locations tab and the location you are searching contains *.pst files, if you customize the E-Mail search to only search the *.pst files **only when found during a file search** then if you do not have Files enabled as a search location – then *.pst files will not be searched.

➢ If "Whenever located in specified file locations" is selected, it will search Outlook Data files (*.pst) whether the Files location is enabled or not:

 or will search *.pst files
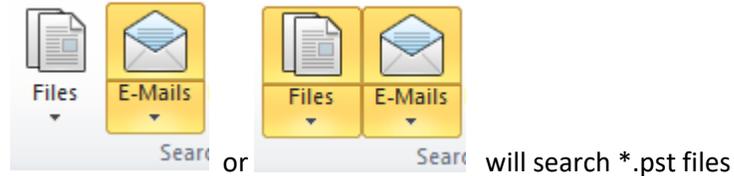
➢ If "Only when found during file search" is selected, it will NOT search Outlook Data files if you do not have Files also enabled:

will NOT search *.pst files

will search *.pst files
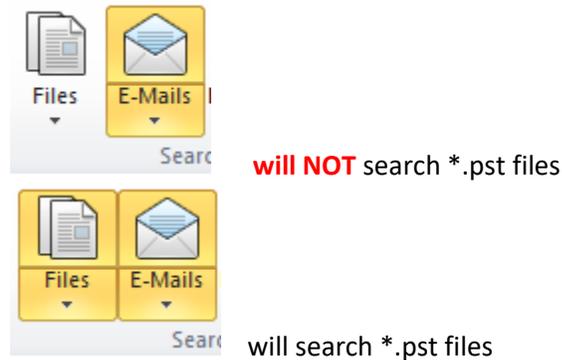
Have signed email messages been sent to you?

If you receive messages that are signed, refer to this Spirion support article that explains how Spirion can be configured to search the email body of signed messages: https://support.spirion.com/hc/en-us/articles/115000019912

Note that attachments to signed messages are NOT scanned by Spirion. If you are aware of certain senders that send signed messages that have the potential to send you DCL3 data, you will have to move that data into the Protective Enclave.