

Cheetah Message Archive

User Guide

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Version History

Version	Date	Description	Reviewed / Approved by
1.0	June 2021	Initial release	Cheetah Digital Product Management
1.1	September 2021	Minor updates	Cheetah Digital Product Management
1.2	December 2021	Review, added version history	Cheetah Digital Product Management
1.3	January 2022	Added EMEA BCC	Cheetah Digital Product Management

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1 Introduction

Overview

This document describes how to navigate and use [Cheetah Message Archive](#).

Many clients require a way to maintain an exact copy of every email that deploys to an individual subscriber, including the personalization values and dynamic content variants that the subscriber received. While [Cheetah Messaging](#) and [Cheetah Messaging: Email](#) (i.e., "CheetahMail") provide the ability to blind carbon copy (BCC) each email message deployed by the platform, most clients do not have the storage and search capabilities to accept the BCC copies.

Cheetah Message Archive is a stand-alone product designed to help brands archive and access copies of all of their outbound email messages from Campaigns deployed from Cheetah Messaging or from Cheetah Messaging: Email. Message Archive provides a scalable method for clients to access their stored messages via an easy-to-use interface. Through the use of state-of-the-art search and indexing technology, users can quickly and easily search their archives based on any criteria found in the content, such as email address, subject line, or even personalization values like an account ID.



Access

Cheetah Message Archive is accessible at the following links:

- [North America](https://mas.eccmp.com/login): <https://mas.eccmp.com/login>
- [Europe](https://cma.cheetahces.eu/login): <https://cma.cheetahces.eu/login>



Account Setup

Cheetah Message Archive is a premium feature available to Messaging and Messaging: Email clients. For more information on the feature, including how to purchase it, please speak with your Client Services team.

Your Services team will be responsible for setting up your account and creating the necessary users. Since Cheetah Messaging Archive is a standalone application, it requires separate login credentials from your Messaging or Messaging: Email login credentials.

The initial user activation process is as follows:

1. Your Services Team creates the new users for your Message Archive account.
2. The platform sends an email notification to each new user. This email will be from Okta, and will provide a link to activate your Okta account. Click this link.

Your system administrator has created an Okta user account for you.

Click the following link to activate your Okta account:

[Activate Okta Account](#)

This link expires in 7 days.

3. The new user activation page is displayed. Enter a valid password, and select a security question / answer, as well as a security image.
4. An Okta page is displayed, but you can disregard this page. Going forward, you will access the Message Archive via the link provided above, then enter your email address and password.

Once you log in, if you have been granted access to more than one account (referred to as a "Data Context" within Message Archive), you'll be prompted to select which Data Context you want to log into. Make your selection and click [Submit](#). The search screen is displayed.

If you have access to only one Data Context, you will be taken directly to the search screen for that Data Context.



Archiving Campaigns

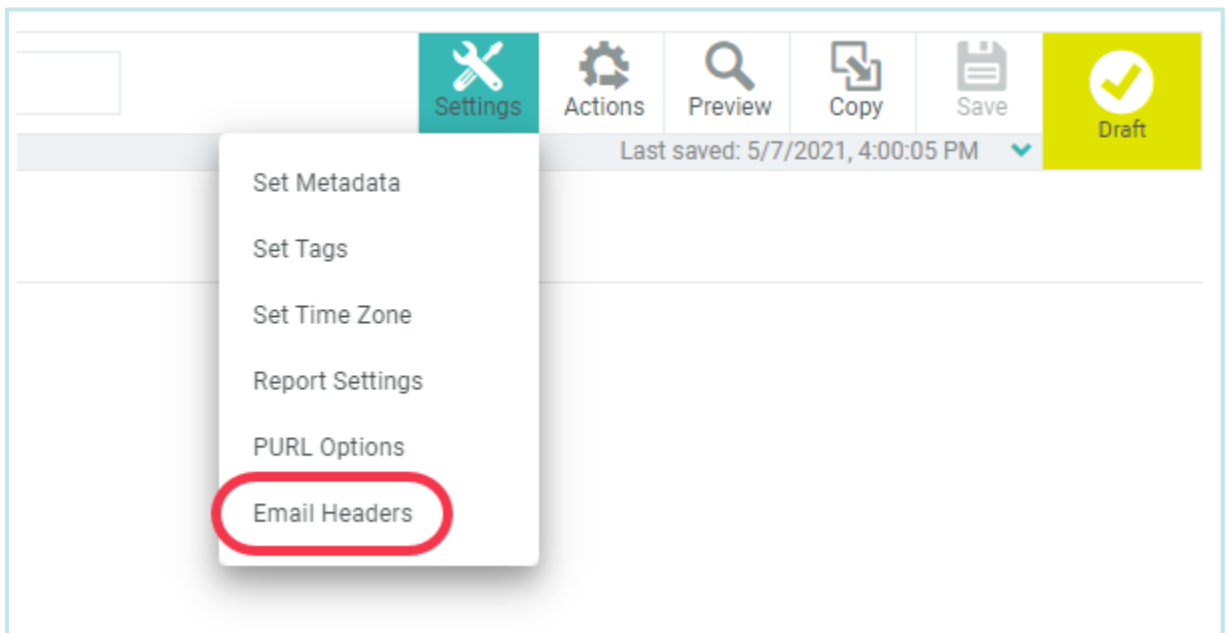
Message Archive is designed to store emails deployed from either Messaging or Messaging: Email. When you want to archive a Campaign, you must add a special Message Archive Blind Carbon Copy (BCC) email address to the Campaign. Messages that get sent to this email address will be archived and made available for later access and retrieval through the Message Archive platform.

The Message Archive BCC email address is:

- North America: bcc@mas.eccmp.com
- Europe: bcc-emeaprod@cma.cheetahces.eu

To set up this BCC address in Messaging:

1. Navigate to the Campaign Details screen for the desired Email Campaign.
2. From the Tool Bar, select [Settings > Email Headers](#) to display the Email Headers pop-up window.



3. In the BCC Address field, enter the BCC address listed above.
4. Click [Ok](#).



To set up this BCC address in Messaging: Email, the BCC feature must be enabled for your account; please speak to your Client Services team for more information on how to enable BCC.

Once enabled, Messaging: Email provides three options for how the BCC is provided at a Mailing level:

- User enters: The user setting up the Mailing manually enters the BCC address.
- Use List of Addresses: The user picks from a set of valid BCC addresses.
- User client level: The BCC address is inherited from the Super Affiliate.

To configure the BCC for a Mailing:

1. Navigate to the [Content Management](#) screen for the desired Mailing.
2. Select the [Settings](#) tab.
3. In the [Advanced Options](#) section, enter or select the BCC email address listed above.



2 Search Screen



Overview

When you log into the Message Archive, the Search screen is displayed. By default, the screen shows email messages deployed in the last 24 hours.

Define Search Parameters

The core functionality of the Message Archive is the ability to define custom search parameters to find specific email messages. The Search Messages pane along the right-hand side of the screen displays the available search options.

Note

A search requires at least two parameters, one of which must be a time period.

To define your search:

1. Enter the start / end dates for your search. A time period is required to execute a search. Click into the Date Range field to view the date picker pop-up window.
2. In the left-hand calendar, click the start date.
3. In the right-hand calendar, click the end date.
4. Optionally, instead of defining a custom date range, you can use the

May - 2021							June - 2021						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1	30	31	1	2	3	4	5
2	3	4	5	6	7	8	6	7	8	9	10	11	12
9	10	11	12	13	14	15	13	14	15	16	17	18	19
16	17	18	19	20	21	22	20	21	22	23	24	25	26
23	24	25	26	27	28	29	27	28	29	30	1	2	3
30	31	1	2	3	4	5	4	5	6	7	8	9	10



links within the date picker pop-up window to use a common date range, such as "Last 30 Days" for example.

5. Enter one or more of the following search parameters. If you enter multiple search options, the platform returns email messages that meet ALL search options.
 - Recipient: This parameter allows you to search for specific recipients by entering all or part of an email address.
 - Subject / Content: This parameter allows you to search any text content in the subject line, and (if enabled) the content body and / or headers of the email. For example, if a message includes a recipient's account ID, you can search on that value.

Note

The ability to search a subject line is available to all Message Archive clients. However, the ability to search the message content is an optional feature that must be enabled in your account. Please speak to your Client Services team for more details.

- Sender: This parameter allows you to search the "from address."
- Campaign ID: This parameter allows you to search on the Messaging Campaign ID or on the Messaging: Email Message ID.

You can use an asterisk "*" as a wildcard in any of the above search fields. For example:

- *.com in the Recipient field would return any address ending in ".com"
- *cheetah * in the Recipient field would return any email address that had the word "cheetah" anywhere within it
- michael* in the Recipient field would return any email starting with "michael"

6. Click [Search](#). The search results are displayed.

Please note that the search results can vary based on your retention policy. If you run a search for the past six months but only retain three months of data, only three months of results will be displayed. Contact your Client Services team if you have questions about your retention policy.



Working with Search Results

Above the list of search results, the platform displays a bar chart depicting the volume of messages sent (that match your search parameters) per day.

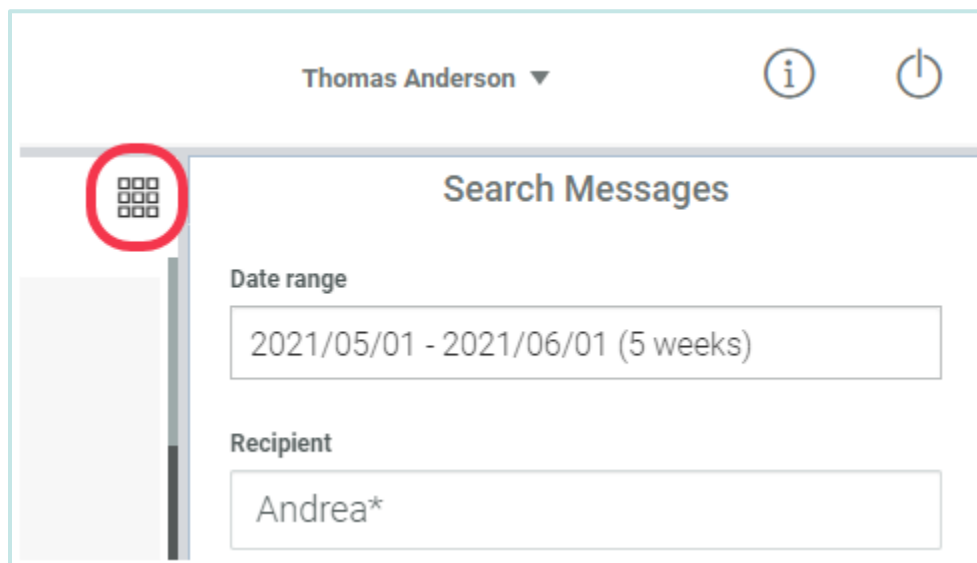
By default, the first 100 messages are displayed; to view additional results, scroll to the bottom of the page and click "view more."

Sort

By default, the search results are sorted by Subject Line. To change the sort order, click the column header for the column by which you want to sort. Click the column header again to toggle the sort order between ascending and descending.

View Mode

By default, the search results are displayed in List View, showing the subject line, recipient email address, sender "from address," and send date. To toggle to Thumbnail View instead, click the Thumbnail icon near the top-right corner of the screen.






Download Messages

All Message Archive clients have the ability to download messages in [.png](#) format. Depending on your account configuration, you may also have the ability to download messages in [.pdf](#), [.htm](#), and / or [.eml](#) formats.






To download a single message, click the download icon for the desired file format next to the message.

Subject ▼	Recipient ▼	Sender ▼	Sending Date ▼	
Summer savings!	thomas.anderson@cheetahdigital.com	promotions@cheetahdigital.com	5/2/2021, 12:02 AM	 PNG  HTML  EML

To download a zip file of ALL messages in your current search results, click the download icon for the desired file format at the top of the screen.

Message Archive

 PNG  HTML  EML

100 of 128 results displayed

You can also configure the platform to automatically execute a recurring daily or weekly export; see [Exports](#) for more details on this feature.

View Message Details

Click on a message to view detailed message information, such as its unique identifier, file size, and send date / time. You can also download any supported version of this message from this screen.



3 Account Management



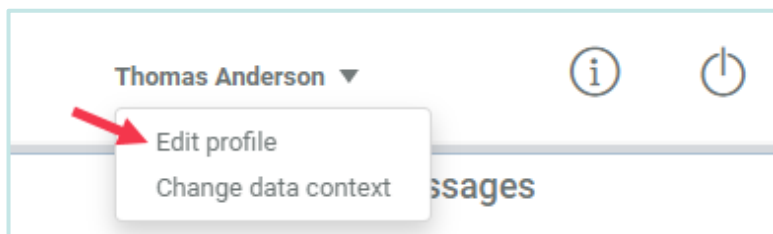
Overview

This section describes additional administrative features available in Cheetah Message Archive.

User Profile

To change your user profile settings:

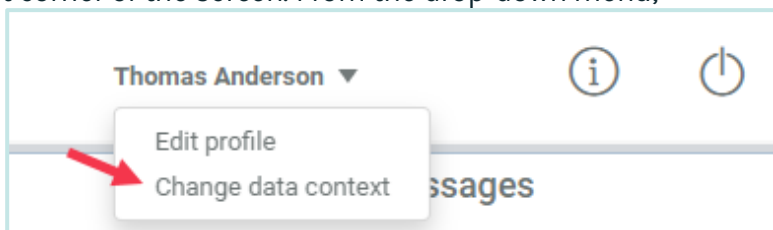
1. Click your name in the top-right corner of the screen. From the drop-down menu, select [Edit Profile](#).
2. From the User Profile screen, make any changes to the following settings:
 - Time Zone
 - Language
3. Click [Submit](#).



Data Context

In Message Archive, different client accounts are referred to as a "Data Context." If you have been granted access to multiple Data Contexts, you can switch between them:

1. Click your name in the top-right corner of the screen. From the drop-down menu, select [Change Data Context](#).
2. From the Data Context drop-down menu, select the desired Data Context.
3. Click [Submit](#). The main Search screen is displayed for the selected Data Context.



Users

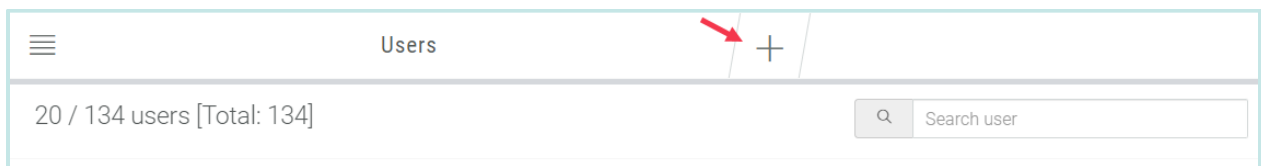
Message Archive supports two client user roles:

- **Standard Users:** Can perform searches within their assigned Data Contexts.
- **Client Administrators:** Can perform searches within their assigned Data Contexts. Can create, deactivate, and delete Standard User and Client Administrator user accounts within their assigned Data Contexts. Can configure automated exports.

Create a User

If you're a Client Administrator, you can create a new user account as follows:

1. Click the Menu icon in the top-left corner of the screen, and select [Admin > Users](#). The Users screen is displayed, showing a list of all users in your Data Context.
2. Click the Add icon at the top of the screen.



3. Enter the user's first name, last name, and email address.
4. Select the user's time zone.
5. Select the user's language setting.
6. From the Permission Level drop-down menu, select either [Standard User](#) or [Client Admin](#).
7. From the Data Context drop-down menu, select a Data Context to which this user has access. Repeat this step as needed to assign additional Data Contexts.
8. Click [Submit](#).
9. The new user will receive a message from Okta with a link to set up their password and then access the platform.
10. When finished, to return to the search screen, click the Menu icon in the top-left corner of the screen, and select [Message Archive](#).



Edit a User Account

If you're a Client Administrator, you can edit an existing user account as follows:

1. Click the Menu icon in the top-left corner of the screen, and select [Admin > Users](#). The Users screen is displayed, showing a list of all users in your Data Context.
2. Optionally enter a search text string in the Search field. The platform filters the list to only those users that have this text string within their first name or last name.
3. Click the desired user. The user's account settings are displayed.
4. Make any necessary changes to the user's account settings.
5. Click [Submit](#).
6. When finished, to return to the search screen, click the Menu icon in the top-left corner of the screen, and select [Message Archive](#).

Deactivate or Delete a User

If you're a Client Administrator, you can deactivate or delete a user account within your data context as follows:

1. Click the Menu icon in the top-left corner of the screen, and select [Admin > Users](#). The Users screen is displayed, showing a list of all users in your Data Context.
2. Optionally enter a search text string in the Search field. The platform filters the list to only those users that have this text string within their first name or last name.
3. Select the desired action from the Action column:
 - To [deactivate](#) the user account, click-and-drag the Lock icon to the left. You can later reactivate this user account by clicking-and-dragging this Lock icon again.
 - To [delete](#) the user account, click-and-drag the Delete icon to the left.
4. When finished, to return to the search screen, click the Menu icon in the top-left corner of the screen, and select [Message Archive](#).



Export

As described above, you can manually download selected messages from Cheetah Message Archive at any time. Optionally, you can also configure a recurring export to run daily or weekly. This process will create an export file containing all new messages since the last export, and send it to a designated SFTP server or Amazon S3 Bucket.

Define Export Configuration

To define the automated export process:

1. Click the Menu icon in the top-left corner of the screen, and select [Admin > Exports](#). The Exports screen is displayed.
2. If you have access to multiple Data Contexts, from the Client drop-down menu, select the Data Context to which this export configuration applies.
3. Select an export type -- [SFTP Server](#) or [S3 Bucket](#).
4. Configure the export type as described below.
 - [SFTP Server](#): Enter the following details:
 - Enable ZIP: Check this option to zip the export file.
 - SFTP Hostname and Port
 - SFTP Remote Directory
 - Username
 - Password and Re-enter Password (optionally check [Change Password](#) to change the SFTP password).
 - [S3 Bucket](#): Enter the following details:
 - AWS Access Key
 - AWS Secret Key
 - AWS S3 Endpoint
 - AWS Region



- AWS S3 Bucket Name
5. Select a schedule frequency: [Daily](#) or [Weekly](#).
 6. Select the file type for the email messages in the export: [.eml](#), [.html](#), or [.pdf](#). Repeat this step as needed to select additional file types.
 7. In the Email Hidden Parameters field, enter one or more email parameters (separated by commas) that you want to use for the export file name and / or for collating email messages within the export file. Hidden Parameters must be included within the email message content. For example:

```
<form>
<input type="hidden" name="group" value="INSURANCE">
<input type="hidden" name="dept" value="SALES">
<input type="hidden" name="doctype" value="RECEIPT">
</form>
```

8. The Export File Name Format is used to define the name of the export file. Enter the Hidden Parameters (defined above) in the desired sequence (separated by commas) to construct the file name.
9. Optionally, to collate the email messages within the export zip file, check [Group Files by Field Value in Zip Files](#). Then in the Field Value text field, enter the Hidden Parameter (defined above) by which you want to group messages together.

Note

The platform will zip up to a maximum 300 messages together, then name the zip file based on the selected "Group by" field. Additional zip files will use an incremental counter.

10. Click [Submit](#).
11. When finished, to return to the search screen, click the Menu icon in the top-left corner of the screen, and select [Message Archive](#).

