MessageSolution™
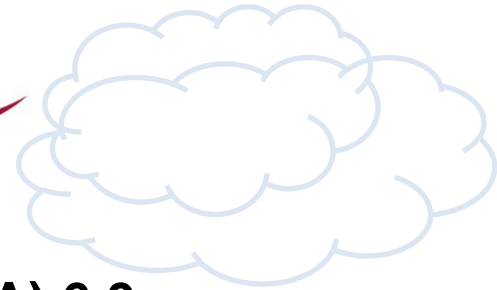
Enterprise Archiving, eDiscovery, Migration

Enterprise Email Archiving (EEA) 6.0
Private Cloud & Dedicated Hosting Platform

Enterprise
Administration Manual

Table of Contents

Chapter 1: Introduction

1.1 About MessageSolution EEA 6.0

MessageSolution Enterprise Email Archive (EEA) offers a secure, easy-to-use, cost-effective, and high-performance archiving system. It provides a long term, highly scalable data store for unstructured information such as emails, files, SharePoint objects, etc. With version 6, Enterprise Email Archive supports a wide variety of messaging or SharePoint environments and file systems, reduces storage costs, and helps organizations meet compliance requirements.

By moving emails and documents onto the MessageSolution EEA, companies can dramatically reduce the cost and complexity of the primary server storage and application infrastructure they require while ensuring compliance and immediate access to the data. With less data on the email/file/SharePoint servers, the corporate servers become easier to manage.

With EEA, companies can archive all their employees' email for an unlimited time period and be able to access the data online at anytime. EEA's built-in search engine will index all data including subject, content, attachment, sender, and receiver information to facilitate an accurate and fast search and retrieval by users, thus reducing administrative workload and increasing overall enterprise productivity.

1.2 How MessageSolution EEA 6.0 Works

EEA is a software-based solution that is normally installed on the local network behind the corporate firewall. It uses three general approaches to archive emails:

1. To archive email servers and file servers, MessageSolution does not install any component on the email/file servers, except for OWA/DWA access stubbed emails.   EEA uses network enabled protocol such as SOAP over HTTP to interact with email server to retrieve email messages.

2. EEA interacts with email server using HTTP or the appropriate protocol specific for each individual mail server (such as SOAP and WebDAV for Microsoft Exchange Servers, NRPC for Lotus Domino Servers, SOAP and IMAP for Novell GroupWise). Using either HTTP or HTTPS, the EEA is easy to deploy on both secured external networks (internet) or unsecured internal corporate networks (intranet) and with support for real-time and scheduled archiving it provides a robust and flexible tool to support archiving from journal or individual end-user accounts.

3. Retrieve emails from any standard mail server using SOAP, WebDAV, NRPC, IMAP, POP3, or SMTP protocols. This flexibility allows the EEA to be deployed into a variety of environments including multiple email server environments using multiple protocols and each server containing a large amount of data to archive.

4. EEA uses CIFS to archive file servers. It remotely connects to the file servers and retrieves file data from file share.

5. For SharePoint system, there will be an agent installed on SharePoint server. The agent uses Microsoft standard APIs to interact with SharePoint system.   It does not directly interact with the data source such as MS SQL Server. EEA interacts with the agent to obtain SharePoint information.

6. Administrator can use MessageSolution additional utility programs such as PST Migration, NSF Migration, and GroupWise Local Archive Migration to import from PST/NSF/GroupWise files into EEA.

7. Administrator can use MessageSolution additional utility programs such as PST Download and NSF Download to export data from archive to PST or NSF files.

After the emails are imported, they are compressed and stored in the archive. Then the EEA's built-in search engine creates an index from each email. All fields including subject, content, attachment, message size, date, sender, recipients, etc. are indexed allowing for quick and accurate searches through millions of emails. Unlike many email archiving solutions which only use SQL Server for indexing, MessageSolution uses a compact and powerful search engine to facilitate the indexing and searching activities. This delivers much faster and accurate search results.

MessageSolution EEA is not limited to only archive emails from email servers that are hosted within a corporate network but it can also archive emails from email servers that are in hosting service.

If the hosting service uses other email server, companies can still archive via IMAP, POP3, or SMTP protocol.

Chapter 2   Installing EEA

2.1   System Requirements

We strongly recommend that your system meet the following minimum system requirements:

- Intel Pentium IV Processor 2.0 GHz or higher

- 2 - 4 GB RAM

- 40 GB of free disk space

- Network Interface Card

- Static IP address

- DNS service access

- Windows 2003 Server, Windows 2008 Server, 32 or 64 bit.

- Sufficient disk space for the expected archive storage amount

2.2   Installation Procedure

Installing EEA on MS Windows

1. Load the installer file "MessageSolution-EEA60-Setup.exe" onto the machine designated for the EEA by downloading this file from the ftp site ftp:\\ftp.messagesolution.com (login information will be provided by your support or sales contact).

2. Double-click on the downloaded file to launch the installer.

3. Follow the onscreen prompts to complete the installation of the EEA (use the default values unless your environment has special considerations). The installation process should take between 10-15 minutes and in addition to installing the application the installation process will also create approximately 5 GB of buffer space for use by the EEA processes.

## 2.3   Preparing MS Active Directory Service and the Exchange Server

In order for EEA to access all Exchange Server mailboxes a user account needs to be created in Active Directory. This user account will be used as the service account for the EEA and needs to be configured to have full access to all mailboxes on the Exchange Server. Once this account is created it will be used in the EEA Web Console for access to all the mailboxes (unless archiving will be real-time only (using a Journal mailbox) in which case please skip to **Step 2.4.1**).

Windows 2003 Server - Creating an EEA Service Account in ADS
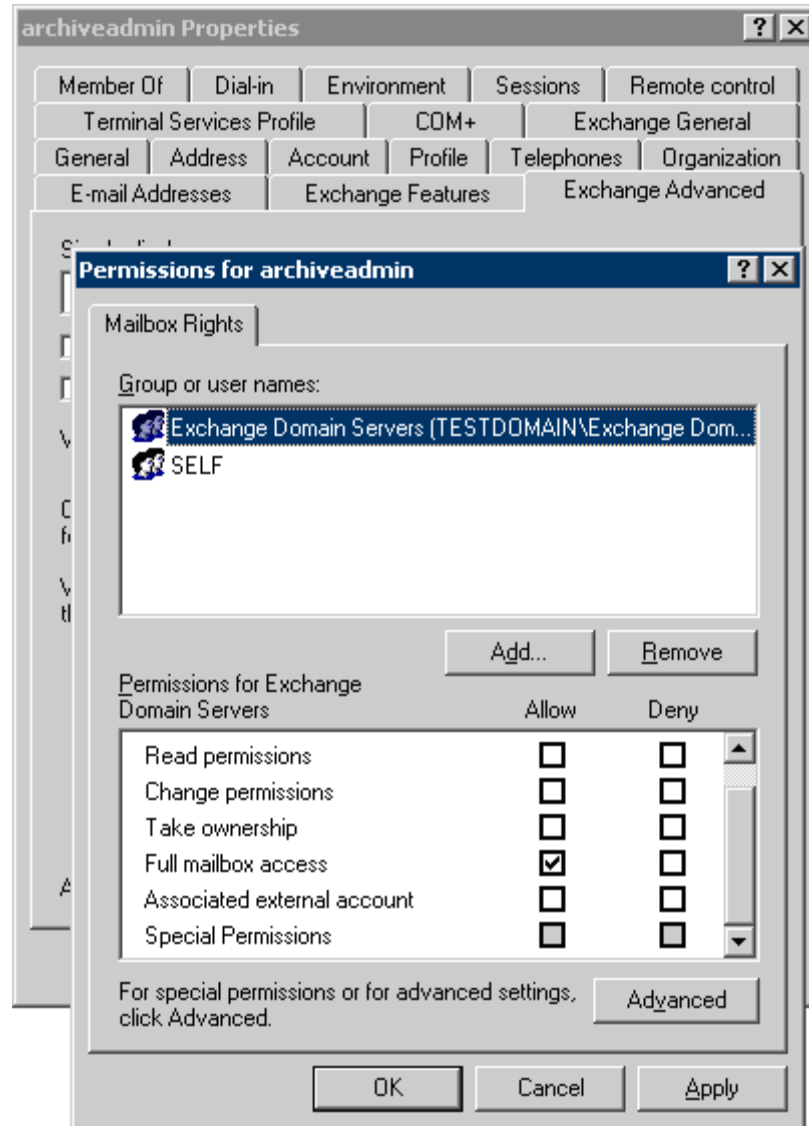
1. Open the Active Directory Users and Computers (MMC) console and create a service account for the EEA by creating a new user and configuring a username (i.e. "archiveadmin") and a password for the account. This username and password will be used exclusively by the archiving process and so we recommend that the password never expires or the archiving process will fail due to no permission to enter the associated mailboxes.

2. Check the box for "Create an Exchange mailbox for this user".

3. After creating the Service Account right-click on the user and choose "Properties" then select the "Exchange Advanced" tab on the Users' Properties window (the Exchange Advanced tab is enabled by default for Exchange 2003 Server).

   On the Exchange Advanced tab, click on "Mailbox Rights" and open the following window:
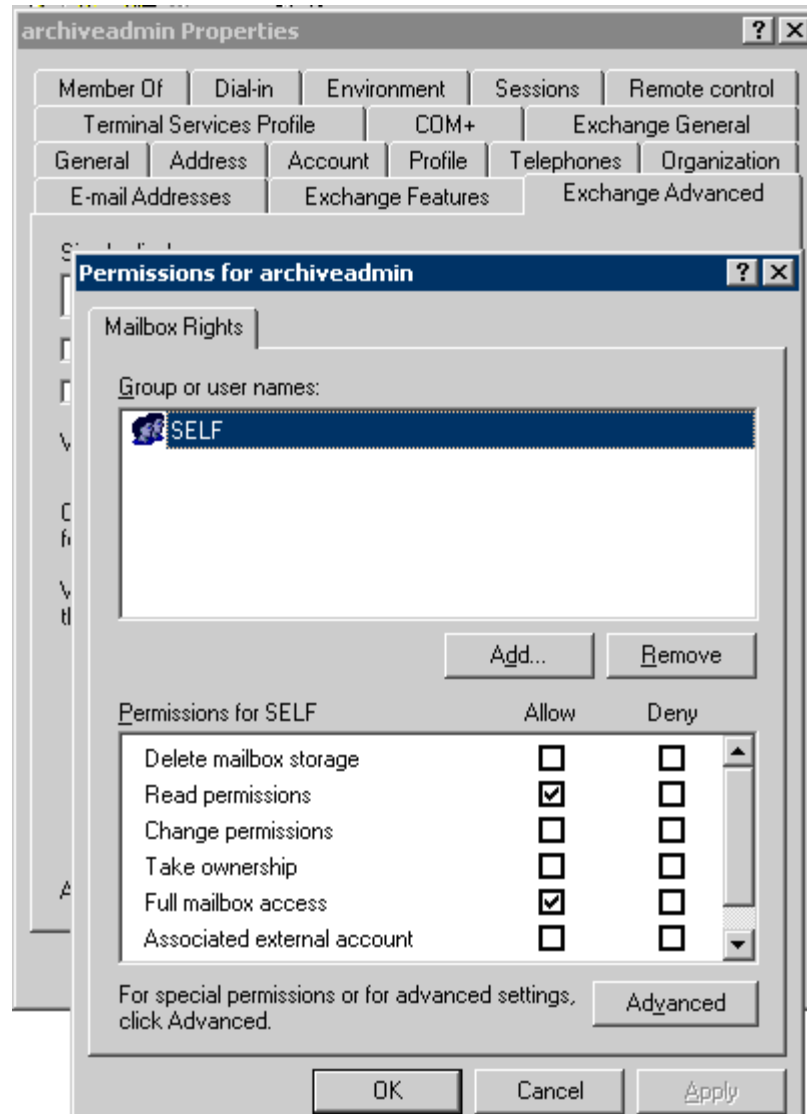
4. Click on the "Add" button, and then click on "Advanced". Enter "Exchange Domain" in the Common Queries field then click the "Find Now" button. Select "Exchange Domain Servers" from this list and click on "OK" and then "OK" again to return to the "Permissions for <username>" screen.

archiveadmin Properties   [?] [X]

| Member Of | Dial-in | Environment | Sessions | Remote control |

| Terminal Services Profile | COM+ | Exchange General |

| General | Address | Account | Profile | Telephones | Organization |

| E-mail Addresses | Exchange Features | Exchange Advanced |

Permissions for archiveadmin   [?] [X]

Mailbox Rights

Group or user names:

- Exchange Domain Servers (TESTDOMAIN\Exchange Dom...
- SELF

[Add...] [Remove]

Permissions for Exchange Domain Servers

	Allow	Deny
Read permissions	☐	☐
Change permissions	☐	☐
Take ownership	☐	☐
Full mailbox access	☑	☐
Associated external account	☐	☐
Special Permissions	☐	☐

For special permissions or for advanced settings, click Advanced.   [Advanced]

[OK] [Cancel] [Apply]

5. Select "Exchange Domain Servers" and make sure you check the "Full mailbox access" box. Click "OK" and "OK" to close all pop-up windows.

6. Now open the Exchange System Manager Console:
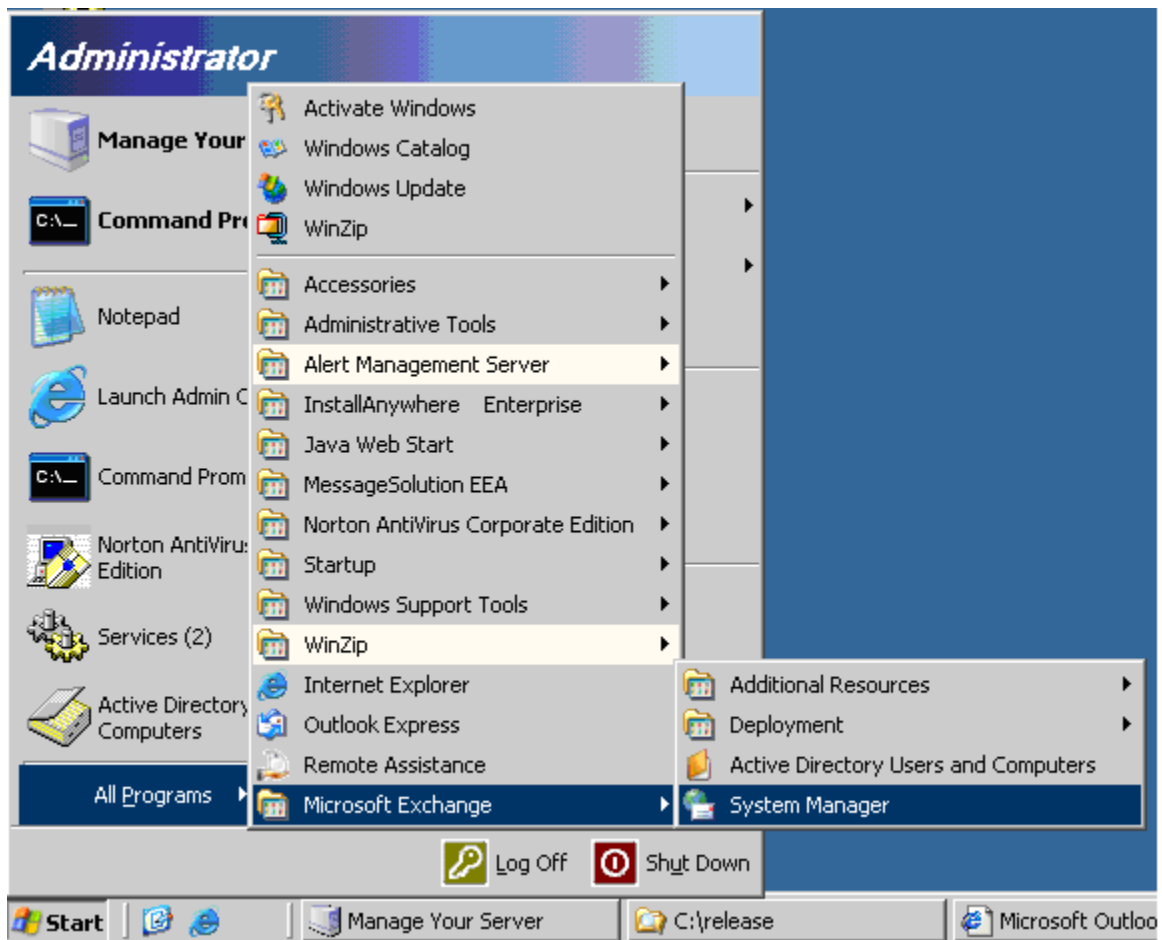
7. Open Mailbox Store and select the Mailbox for the Domain we will archive from. Right-click to choose "Properties":
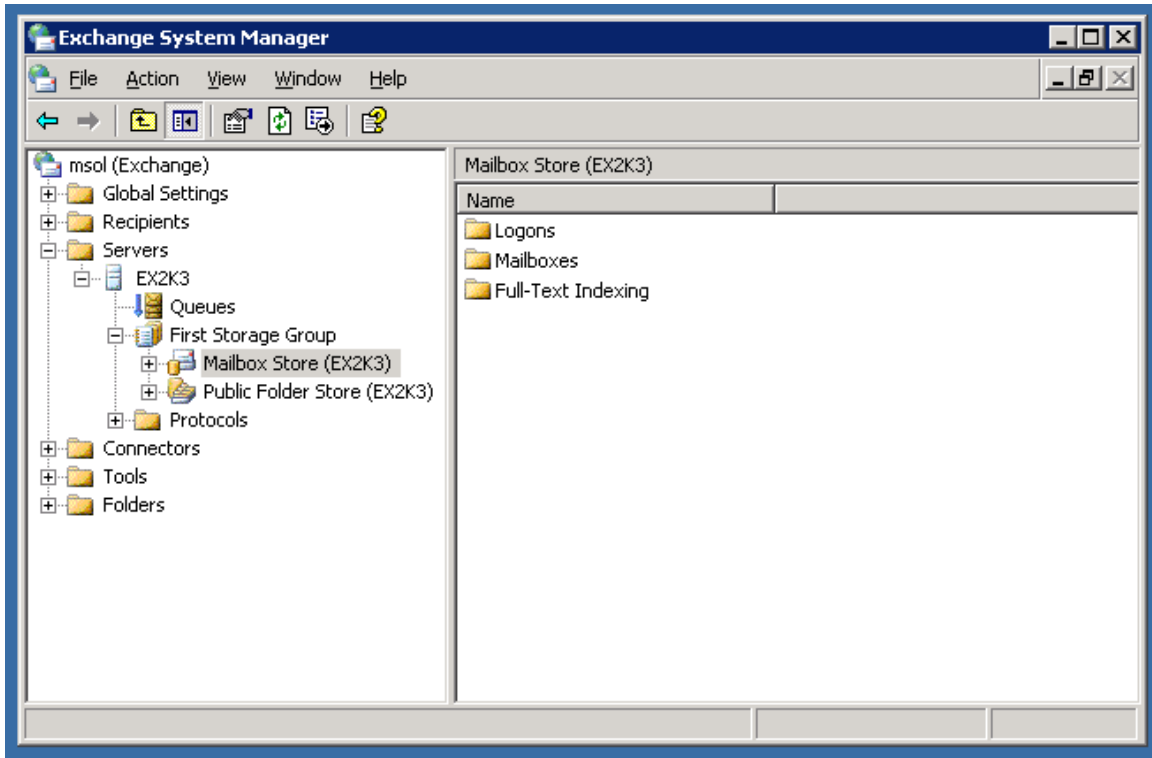
8. On the Properties window, go to the "Security" tab, click on "Add" and enter the username for the service account that was just created (in this case "archiveadmin"). Click "Check Names" to verify the username exists. Click on "OK" to return back to the previous window.
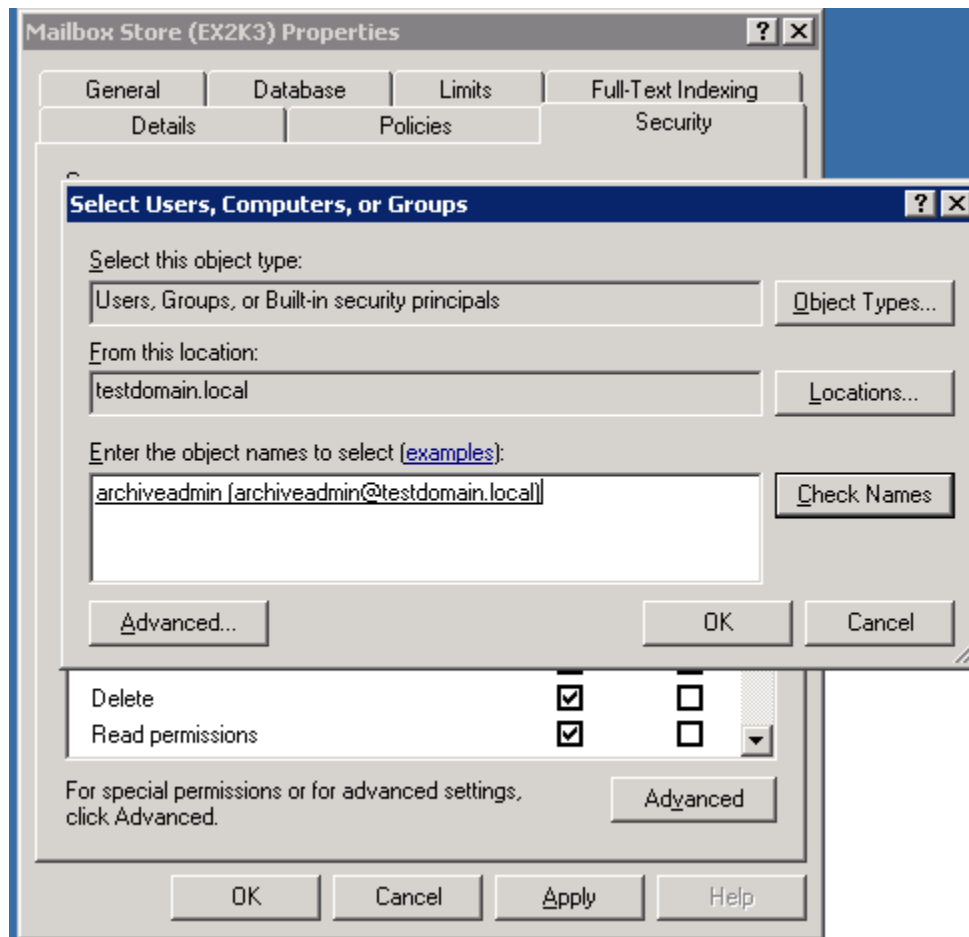
9. Select the username for the service account and "Full Control", "Receive As", and "Send As" should all be checked.

10. Exit the Exchange System Manager Console.

Windows 2000 Server- creating an EEA Service Account in ADS

1. Open the Active Directory Users and Computers (MMC) console and select the "View" menu option then select "Advanced Features":
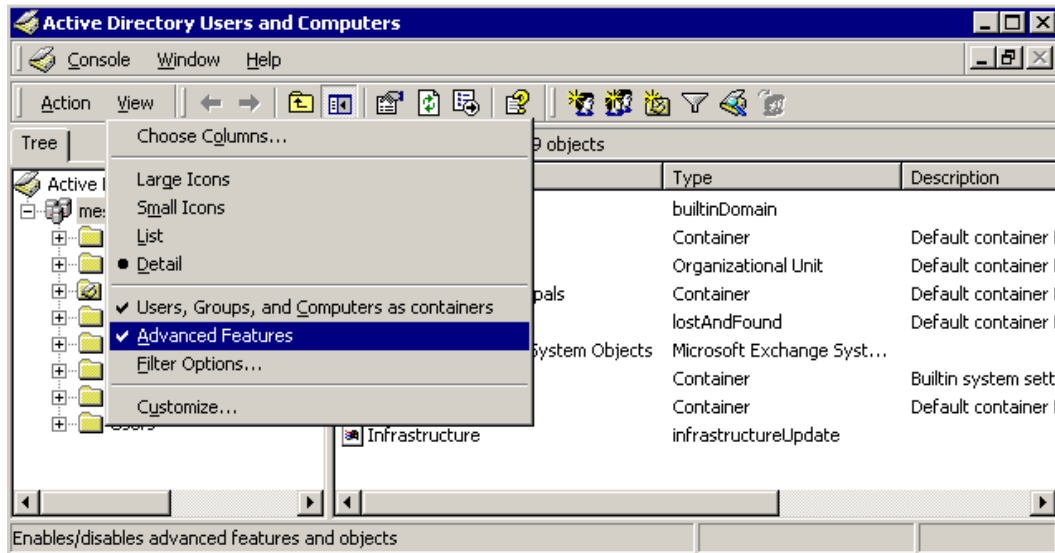
2. Open the Active Directory Users and Computers (MMC) console and create a service account for the EEA by creating a new user and configuring a username (i.e. "archiveadmin") and a password for the account. This username and password will be used exclusively by the archiving process and so we recommend that the password never expires or the archiving process will fail due to no permission to enter the associated mailboxes.

3. Check the box for "Create an Exchange mailbox for this user".

4. After creating the Service Account right-click on the user and choose "Properties" then select the "Exchange Advanced" tab on the Users' Properties window.
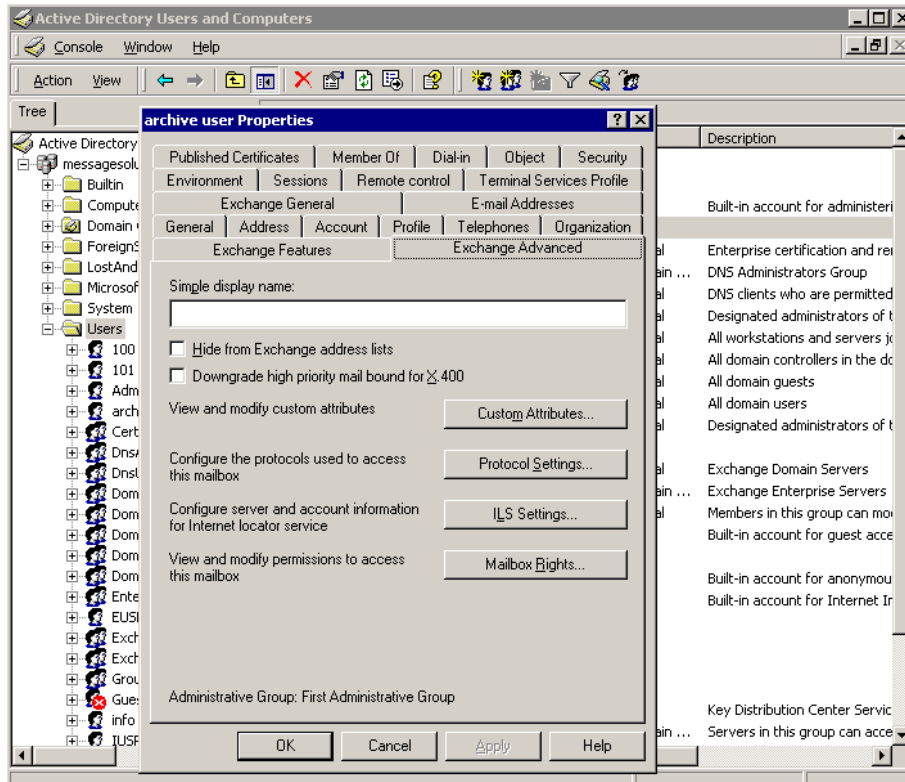
5. Now click on "Mailbox Rights" button.

6. Click "Add" and then add the "Exchange Domain Servers" group. Make sure to click the "Full mailbox access" box. Click "OK" to go back to the user property window.
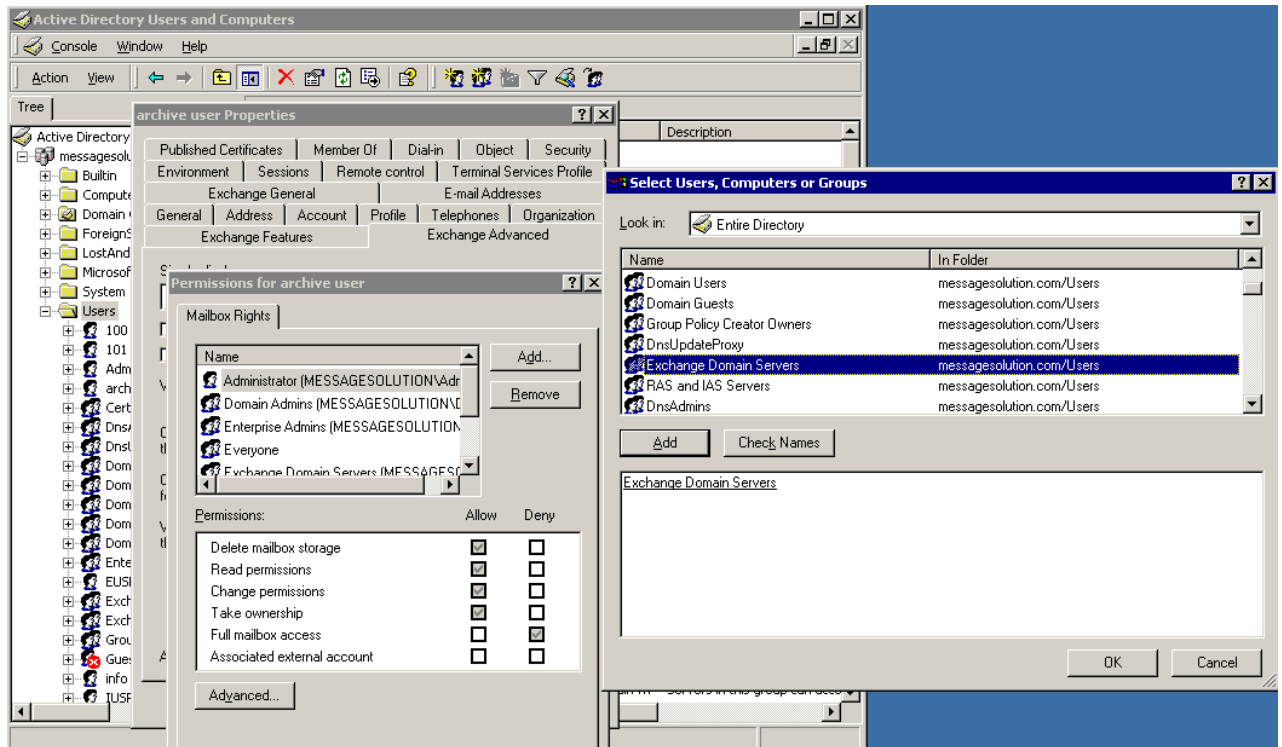
7. On the service account user's property window select the "Member Of" tab and click "Add" to add "Exchange Domain Servers". Please make sure this user is not a Member of either the "Domain Admins" or the "Enterprise Admins" group. In order to have access to all mailboxes, this service account needs to be only in the Exchange Domain Servers group, and must not be a member of the Enterprise Admins or the Domain Admins groups.

2.4   Enabling the Journal Mailbox for Real-time Archiving

Some organizations are required by regulations to archive every email as the emails are sent or received. In the Exchange Server environment, EEA leverages Exchange Server's Journal Mailbox feature to fulfill these regulatory requirements.
As emails pass through the Exchange Server they are copied to the journaling mailbox where the EEA will periodically poll the journaling mailbox and archive any emails stored in the journal.

Setup Journaling on the Exchange Server

1. Create a mailbox name in Active Directory to which all emails will be archived (i.e. "jarchive").

2. Open the Exchange System Manager and navigate to the Mailbox Store by opening "Servers-> <server_name> -> Storage Group". Right-click on the "Mailbox Store" node and select "Properties".
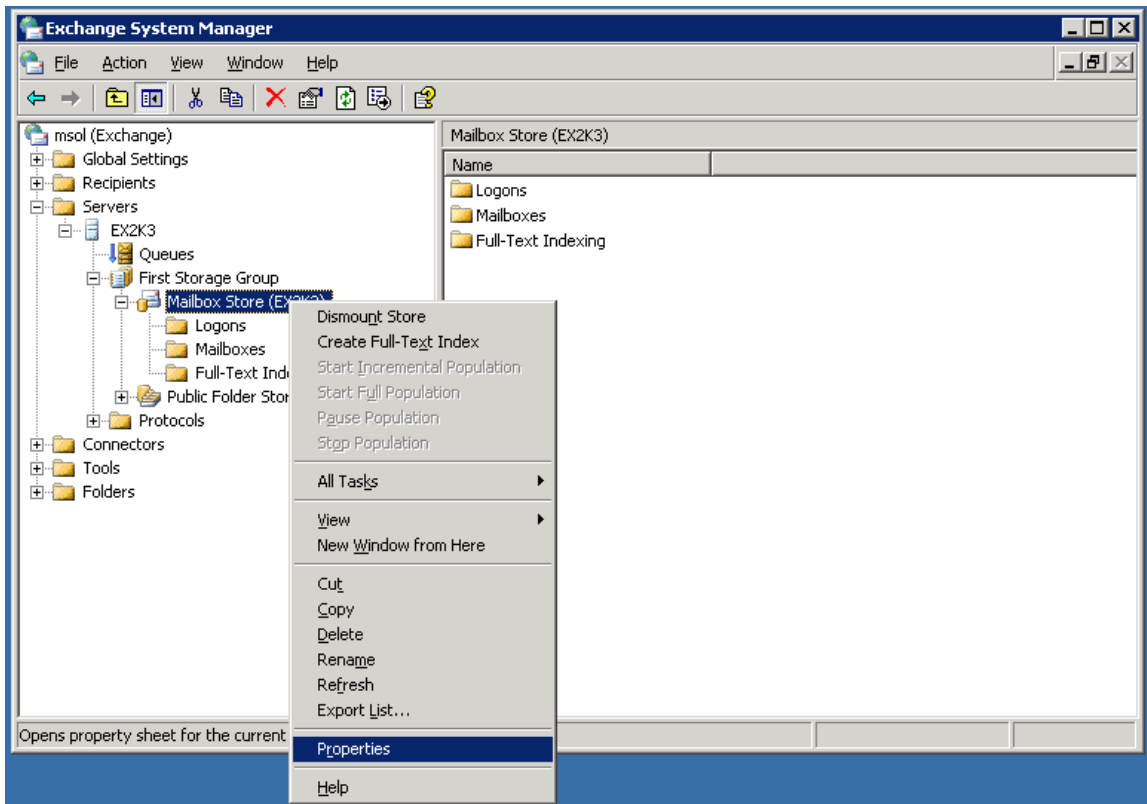
3. In the Properties window select the "General" tab and check the "Archive all messages sent or received by mailboxes on this store" box.
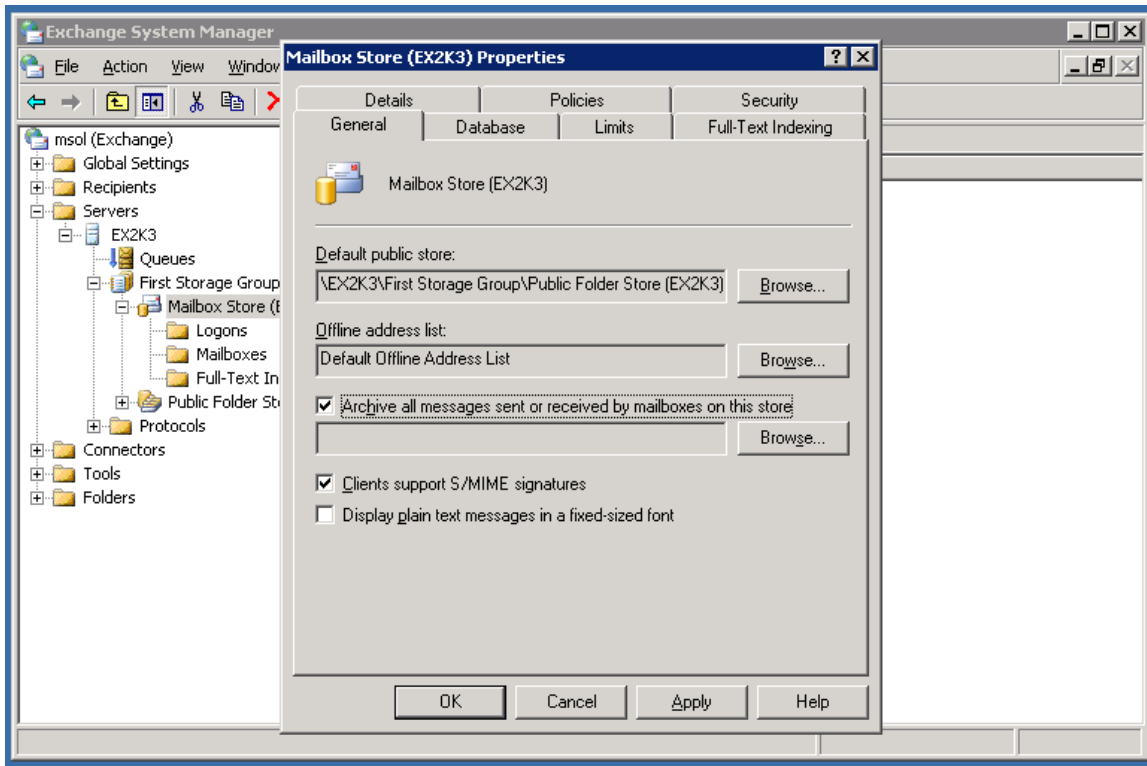
4. Click on the "Browse" button located to the right of the "Archive all messages sent or received by mailboxes on this store" box. The "Select Recipient" dialog will be displayed.

5. In the Select Recipient dialog box enter the journaling mailbox name you created in Step 1

6. Then click the "OK" button to close the "Select Recipient" dialog. Close the "Mailbox Store Properties" dialog and the Exchange System Manager Management console when finished.
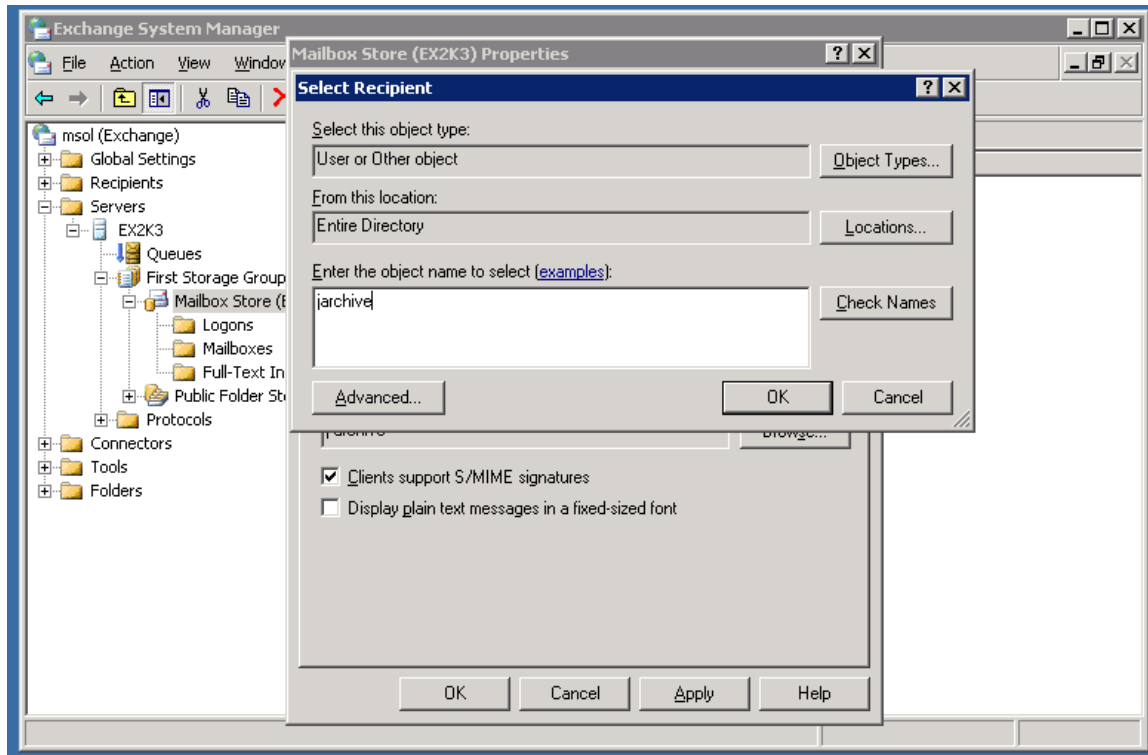
Enabling Envelope Journaling (optional)

Some regulations require companies to capture the full email headers information including the "BCC" field. In order to capture all this information Exchange Envelope Journaling needs to be enabled.

Exchange Envelope Journaling captures all the RFC2821 and RFC2822 recipients, including "CC" and "BCC" recipients. It also captures the full expansion members of any distribution groups.

Envelope Journaling is available in Exchange 2000 post Service Pack 3 and Exchange 2003 Service Pack 1 and can be enabled by using the Exchange Server Email Journaling Advanced Configuration (exejcfg.exe) tool.

To use the exejcfg.exe tool to enable Envelope Journaling, follow these steps:
1. Open the command prompt.
2. Navigate to the folder in which you copied the exejcfg.exe tool.
3. Type **exejcfg –e** and press the **Enter** key to enable Envelope Journaling.

Note 1: exejcfg –d disables Envelope Journaling.

Note 2: You can download the exejcfg.exe tool from the following Microsoft web page:

http://www.microsoft.com/downloads/details.aspx?FamilyID=e7f73f10-7933-40f3-b07e-ebf38df3400d&displaylang=en

Note 3: You can use the exejcfg.exe tool downloaded from the above link in both Exchange 2000 and Exchange 2003 server environments.

Chapter 3   Configuring EEA Basic Settings for Email Archive

The **Basic Settings** section configures the EEA Admin Account, Change Password, SMTP Connection, Network, Authentication Servers, Email Servers, Groups, User Management, Outgoing Email, Repository, Backup Settings and LDAP Filter.

3.1   Starting the Web-Based Management Console

To view the console start a web browser and go to:

http://<EEA's IP address>:port/

Note: The default port number set during installation is 80.

3.2   Administrator Account

During the installation process the EEA creates an administrator user account. Additional administrator accounts can be created and can be configured for complete access (system administrator), "Report administrator" or "Config administrator". The "Report administrator" just can view the archiving logs; but he or she will not be able to see, modify or delete the EEA's configuration settings and not view all the emails saved in archive; The "Config administrator" that can only setup or modify the EEA's configuration, but who cannot search or read any of the archived emails in the system.

To add additional admin user:

1. Click on **Admin Account** under the Basic Settings menu. Click "Add" to add a new admin user and select the type of admin account you would like to create:
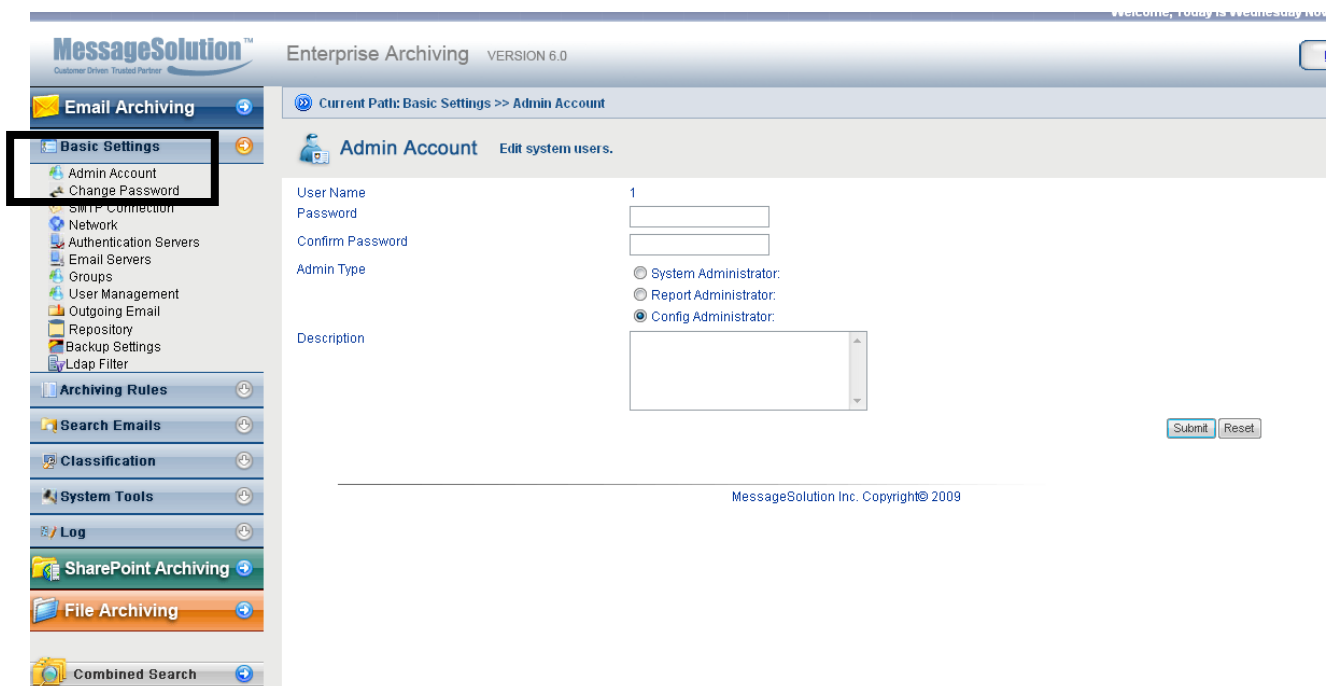
3.3 Management Console Password

Access to the EEA Management Console requires a valid password to prevent unauthorized entry and for maximum security it is highly recommended that you periodically change your password.

Note: After installing EEA the default console username is "administrator" with password "admin" (without double quotes). It's also highly recommended to change this default password after installation.

To configure or change the Management Console's password:

1. Under the Basic Settings menu click "Change Password":
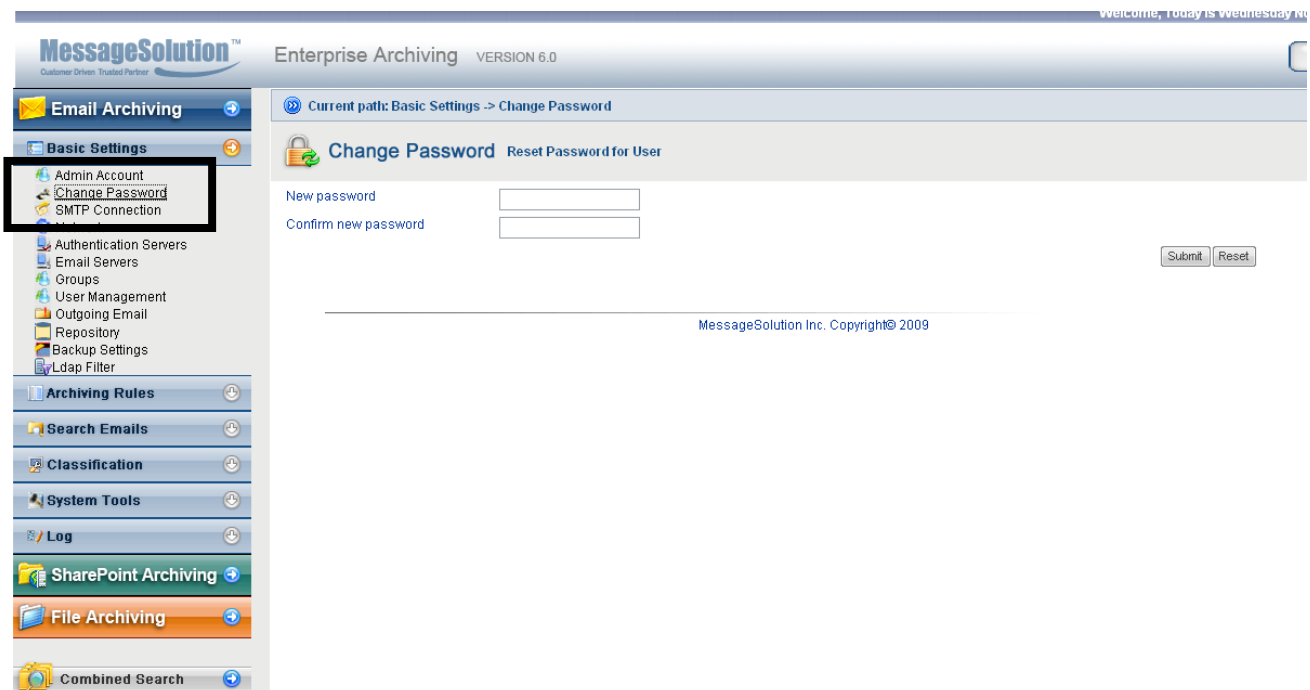
2. Enter the new password and confirm the new password. Then click on the "Submit" button to save your information (depending on your screen resolution you may need to scroll right to display the "Submit" button). The "Reset" button will reset the original values to each field (not reset the default password).

3.4   SMTP Connection

SMTP connections can be used to archive from almost any standard server which uses this protocol and also for configuring the EEA to accept forwarded emails for archiving.

To configure **SMTP Connection:**

1. Click on the "SMTP Connection" link under the Basic Settings menu. Add the trusted IP addresses or a block of IP addresses to the list and the EEA will identify the sending/forwarding IP address. If the sending/forwarding IP address is configured in the SMTP Connection list the emails will be archived.

2. Click "Submit" to save or update the list.

3.5　Network Configuration

The network information is used for inserting a URL path to access the archived emails during Mailbox Manager.

During the initial installation the network information is automatically collected from your server, but you should at least verify the host name (the Domain name is optional).

To change the **Network** setting:

1. On the Basic Settings menu click the "Network**"** link.

2. On the Network Setting page enter or change the "Host Name" and/or the "Domain Name" Host Name is the only required field).

3. Click "Submit" to save the network settings for the archiving system.

3.6 Authentication Servers

The EEA seamlessly integrates with Microsoft Active Directory Service, Domino LDAP Service, Open LDAP and standard IMAP and POP server protocols for authentication purposes. User information, including folder and group information, can be automatically populated when using Microsoft's ADS or Domino's LDAP service.

To configure Authentication Servers:

1. Under the Basis Settings menu click "Authentication Servers".

2. Click on "Add" to add authentication servers.

3. Select a "Server Type", i.e. Microsoft Active Directory or IBM Active Directory.

4. Enter the Domain Name associated with your corporate email address.

5. Enter the hostname or IP address for the LDAP Server.

6. For Exchange or Domino Servers enter an administrator username and password. This administrator needs to have permission to access all mailboxes from which we will archive (if only archiving from the journal mailbox enter the journal mailbox username and password). For IMAP or POP enter any username and password combination. Click "Submit" to save or update the information.

7. After the retrieval process has completed, clicking on the "User Management" or "Group" link will allow viewing the user/group information.

8. If you use ADS or Domino Directory click on the "User Management" link for a list of users who can be archived on the system. Click on "Edit" for any user to see detailed information about the user's archiving account.

Note: if you only plan to use real-time archiving (journal archiving) it is only necessary to enter the journal mailbox name and password on the Authentication Server page.

3.7   Email Servers

Email servers are selected for archiving along with the appropriate protocol per email server (multiple or different protocols can be selected as needed per server).

To configure Email Servers:

1. On the Basic Settings menu click the Email Servers link and click "Add" to manually add email servers (alternatively "Retrieve Servers" can be selected from the "Authentication Server" page and then the only change needed would be to select the appropriate protocol for each mail server and port).

2. In the first section enter the appropriate information for each email server. The "Name" field is a friendly name for the email server (this name needs to be unique if you plan to archive from multiple email servers). "Domain Name" is the corporate email server domain. "Mail Server Host" is the email server's hostname or IP address. The EEA uses "Port" to access the email server and the default port is 80 or HTTP protocol. For POP3 the port is 110 and for IMAP it should be 143. SSL connections can also be enabled to retrieve emails from the email server using a secure connection and SSL will require a different port number and should be changed accordingly. "Email Server Type" is where the protocol is selected for each email server. Exchange WebDAV is typically selected for Exchange 2000 and 2003.NotesCom is selected for the entire Domino version, but if NotesCom is selected the MessageSolution Domino Connector must be installed (refer the installation steps for the MessageSolution Domino Connector). After entering the appropriate information click on "Submit" to save the email server settings.

3. The second section on this screen is to test the connection to the email server. After saving the email server settings, locate the email server which the connection will be tested from the list of the email servers and click "Edit". In the bottom section of the page enter a username and password has permissions to access mailboxes on the email server. Choose the appropriate protocol and click "Connect**"** to test the connection to the email server

4. Multiple email servers and protocols can be configured for simultaneous archiving.

3.8   Groups

The EEA allows for the creation of a hierarchical structure for supervision and the ability to apply different archiving policies to different subsets or individuals or "Groups". Although the EEA can automatically retrieve Group listings from ADS or Domino Directory the administrator can also manually create groups of users for use only within the EEA and then assign users to those groups. Supervisors can also be designated for each group and the supervisor would have the right to view any of the emails for members within that group.

1.   Click on "Groups" under the Basic Settings menu.

2.   Click the "Add" button to add a new group, or click "Edit" to view an existing group. Here you can also assign a user as the supervisor for the selected group. The following screen shows the group information and where to add users in this group.
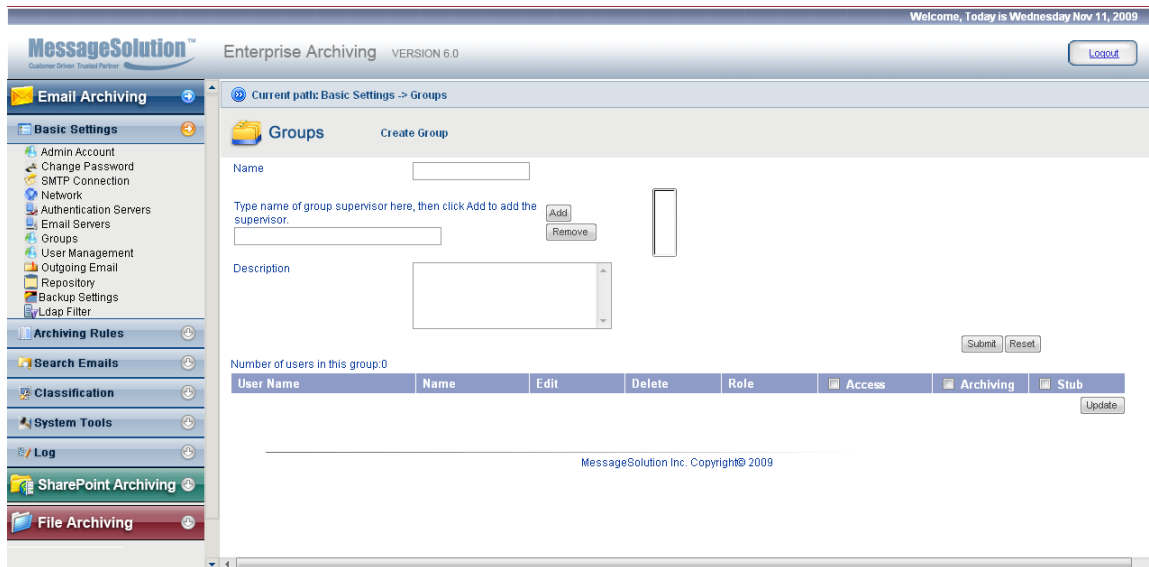
3. User and group mapping information are automatically generated during retrieval from the ADS or LDAP server. Administrators can add more users to a group in the User Management screen while editing that user or by assigning a user to a group while editing a group from the available group list.

4. Click on "Archive Groups" to view a listing of all the groups who have been selected for archiving. "Edit" any group to add or remove users as the supervisor for the selected group.

5. Click on "Stub Groups" to view a listing of the entire group who have been selected for stub. "Edit" any group to add or remove users as the supervisor for the selected group.

3.9 User Management

The EEA will automatically retrieve the users from the ADS or Domino LDAP server once the Authentication Server information is correctly configured, or the user information can be manually added into the EEA (Note: it is recommended that once a user has been added, that the user information not be deleted from the EEA. If the user information is deleted then the Administrator may become the only user who can access emails belonging to that deleted user. Therefore we highly recommend that any user whose email has been archived should not be deleted from the EEA but just disabled for archiving.)

To configure User Management:

1. Under the Basic Settings menu bar click "User Management" and if the Authentication Server information is already in the system then a list of users will be displayed on the right (If there are no users listed either there is no user information in the currently configured LDAP server or the LDAP Server is improperly configured under Authentication Servers).

2. Here we can selectively enable/disable archiving for each user, enable/disable access to the archive, enable/disable the ability to restore emails from the archive, enable/disable stubbing, and delete a user(s) from the archive user list (this will not delete the user from the LDAP Server). We can search for a user by the user's email username by entering the complete username or part of the username in the Search field, and if using multiple domains the EEA can display users from a particular domain by selecting the Domain Name in the selection drop-down list.

MessageSolution™
Enterprise Archiving, eDiscovery, Migration

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Enterprise Archiving VERSION 6.0

Logout

Current path: Basic Settings -> User Management

User Accounts Management

- Email Archiving
- **Basic Settings**
  - Admin Account
  - Change Password
  - SMTP Connection
  - Network
  - Authentication Servers
  - Email Servers
  - Groups
  - **User Management**
  - Outgoing Email
  - Repository
  - Backup Settings
  - Ldap Filter
- Archiving Rules
- Search Emails
- Classification
- System Tools
- Log
- SharePoint Archiving
- File Archiving

| User Accounts | Archive Users | Stub Users |

Domain Name: All ▾   Search   Add   Update

Number of users:: 6   Page 1 of 1

Name	User Name	Edit	Restore Emails	☐ Access	☐ Restore	☐ Archiving	☐ Stub	☐ Delete
Admin	Admin	edit	restore emails ☑	☑	☐	☑	☐
Admin	Admin	edit	restore emails ☑	☑	☐	☑	☐
jintao	jintao	edit	restore emails ☑	☑	☐	☑	☐
jintao	jintao	edit	restore emails ☑	☑	☐	☑	☐
journal	journal	edit	restore emails ☑	☑	☐	☑	☐
journal	journal	edit	restore emails ☑	☑	☐	☑	☐

Number of users:: 6   Page 1 of 1   Add   Update

3. Click on "Archive Users" to view a listing of all the users who have been selected for archiving or "Stub Users" for a listing of all the users selected for stubbing on the system. "Edit" any user to view their individual information and settings including: User Information, Folder Setting, Authorize Classifications for setting individual archiving policies and Access Permission

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Enterprise Archiving VERSION 6.0

Logout

Current path: Basic Settings -> User Management

User Accounts Management

- Email Archiving
- **Basic Settings**
  - Admin Account
  - Change Password
  - SMTP Connection
  - Network
  - Authentication Servers
  - Email Servers
  - Groups
  - User Management
  - Outgoing Email
  - Repository
  - Backup Settings
  - Ldap Filter
- Archiving Rules
- Search Emails
- Classification
- System Tools
- Log
- SharePoint Archiving
- File Archiving

Logout

| User Information | Folder Setting | Authorize Classification | Access Permission |

User Basic Information

User Name   Admin

Email Addresses

Add
Remove

Admin/messagesolution/%xhq@com
Admin/messagesolution@xhq
Admin@xhq

e.g. myaddress@messagesolution.com

First Name

Last Name   Admin

Password   •

Server   10.0.0.226 ▾

Group

Description

Archiving   ☑
Use System Policy   ☑
Access   ☑
Restore   ☑
View all user's email   ☐

Save User Information

4. User's information can be changed on the User Information tab as well as verifying the LDAP default email address and any aliases for each user (additional aliases can be manually added here as well if needed).

5. Passwords can be set here as well allowing the user to have access to their archived emails. Passwords entered in this field are checked prior to attempting to authenticate the user with LDAP information and would only allow access to the user's individual email and email for any groups or users where they have supervisor rights.

6. If Group information is available you can associate this user with any of the listed groups and choose which server stores this user's mailbox.

7. Additionally, the user can be granted the right to access all archived emails on the system regardless of the permissions/passwords exactly as if the user was a "View Only" Administrator on the EEA.

8. Click on the Folder Setting tab to select which folders to archive and stub. Folder Setting is used by the Scheduled Archiving and Mailbox Manager stubbing process to determine which folders will be archived and/or stubbed. By default all users' folders except the Deleted Items folder are added in this list and will be archived. Add or remove any folders from this list to customize the archiving and/or stubbing process.

9. Click on the Authorize Classification tab to see which classifications the user is authorized to access and view the associated emails from the search results.

10. Click on the Access Permission tab to select users or groups. This user will have access permission to the selected users and groups' archived emails in when the user performs search.

11. On each tab, click on "Save" to save the settings.

3.10 Outgoing Email

1. Configure an email alert for events that would require action or notification of the specified administrator or send email archiving report (real-time archiving status to display number of emails archived).

2. Check "Notify admin when non-owner viewed archived email" if you want to notify to the administrator via email when someone other than an administrator is viewing emails that do not belong to that user.

3. Check "Send daily archiving report to administrator" if you want to get the daily archiving report.

3. For situations where the EEA host machine does not have DNS configured and cannot send out alert emails or forward archived emails a Relay MTA would need to be configured in order to be able to send emails from the EEA. The MTA port is typically PORT 25 and the "Sender Email Address" can be any valid email

address that the MTA can recognize. If the MTA requires ESMTP enter the appropriate username/password for the Sender Email Address account.

3.11   Repository

The EEA allows the specification and modification of the storage location on a dynamic or "as needed" basis. Simply add as many repositories as desired and specify in the EEA where to store archived data. The EEA can search and retrieve data from all repositories and in this way you can save data storage costs because you do not need to prepare large amounts of storage to begin with, just prepare more storage as needed.

During installation a default repository path will be set. To edit an existing repository or to add additional repositories click on "Add".   For Grade select "First Repository" then select the EEA Name this repository is available for and choose the disk type "Disk" or "Centera" for EMC Centera CAS devices. Give it a unique repository name and specify a valid Path/URL then determine if this Repository should be the "Default" repository or primary storage location. Set the Repository to "Active" if it should be available immediately and determine the best Alert Level for which email alerts will be sent to the administrator.

3.12 Backup Settings

Although the EEA is an archiving solution, because email can be a very sensitive subject and is often cited in modern litigation, the need to backup the Archiving Solution becomes necessary to comply with legal requirements or Disaster Recovery. Backup Settings will allow the administrator to configure a backup location for the automatic backup of the archived data and additionally the email index if desired. The administrator can also configure when the backup would run and what information should be restored back onto the EEA Server during a restore from backup procedure.

3.13 LDAP Filter

The EEA allows administrators to set a LDAP filter to retrieve needed servers, groups or users from AD. We suggest installing the SUPTOOLS on the AD machine (it can be found under support\tools\suptools.msi from Microsoft Windows system installation disk).
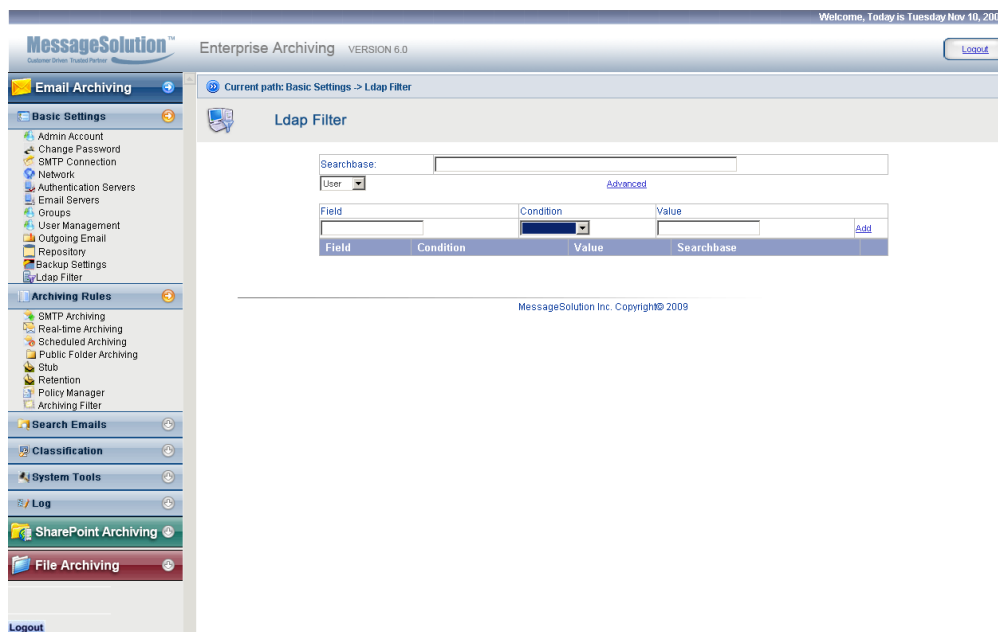
1. Run adsiedit.msc to open the ADSI Edit
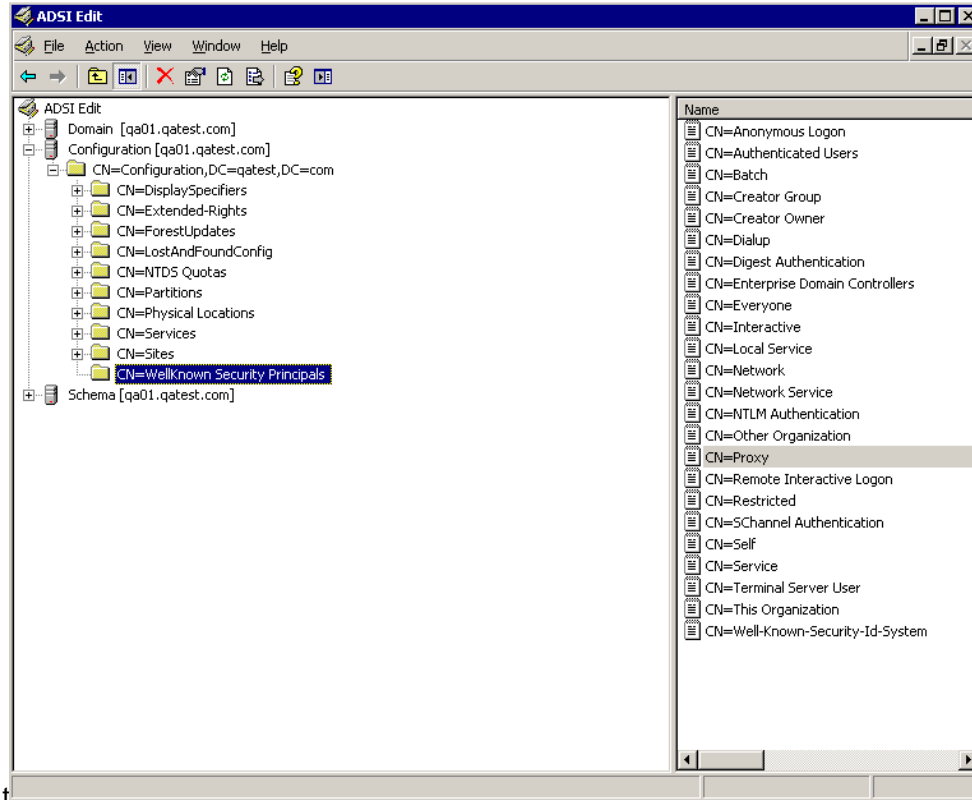
2. On EEA web UI, Searchbase: enter Organization name or Organizational Unit name.such as CN=Users,DC=exchangedemo,DC=com;
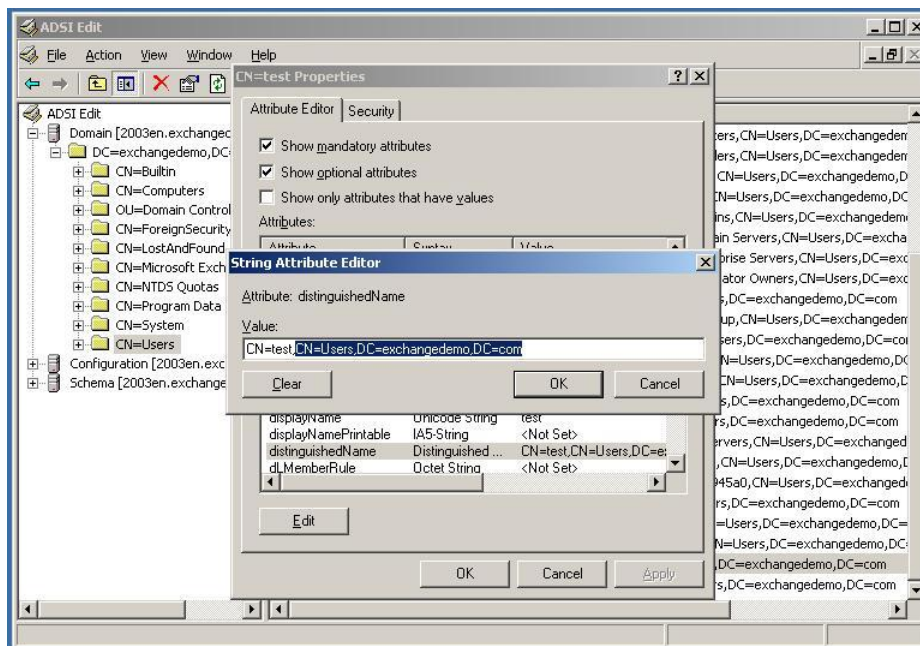
3. The selection field is for user, group or server.

4. "Advanced" link allows power user to set LDAP query so EEA can run it directly. For example:

   User : (&(objectClass=user)(objectClass=person)(objectClass=organizationalPerson)(mail=*))

Group: (&(objectClass=group)(objectClass=top))
Server: (&(objectClass=server)(objectClass=top))
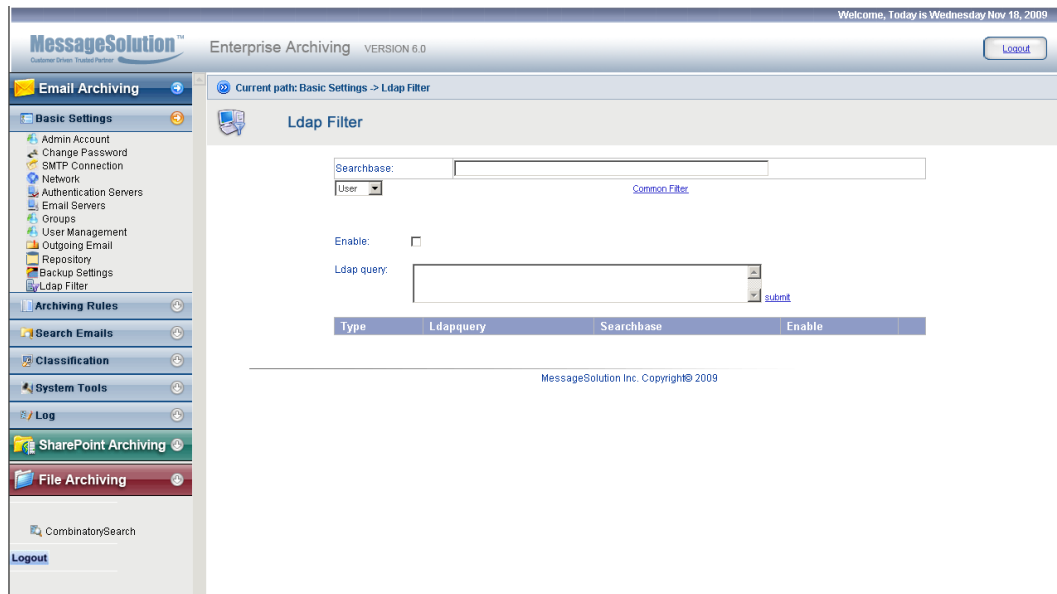
5. When inputting the wrong query, EEA will not retrieve user, group or server.

6. "Field" can be found in ADSI Edit. It's the name of the attribute.

7. Condition: this is an operator to apply to the field and value.

8. Value: the actual value for the Field. For example, a Group name is Exchange Admin, you can find the attribute name for Field and enter Exchange Admin in Value textbox.

Click on Advanced link, you can specify LDAP query:
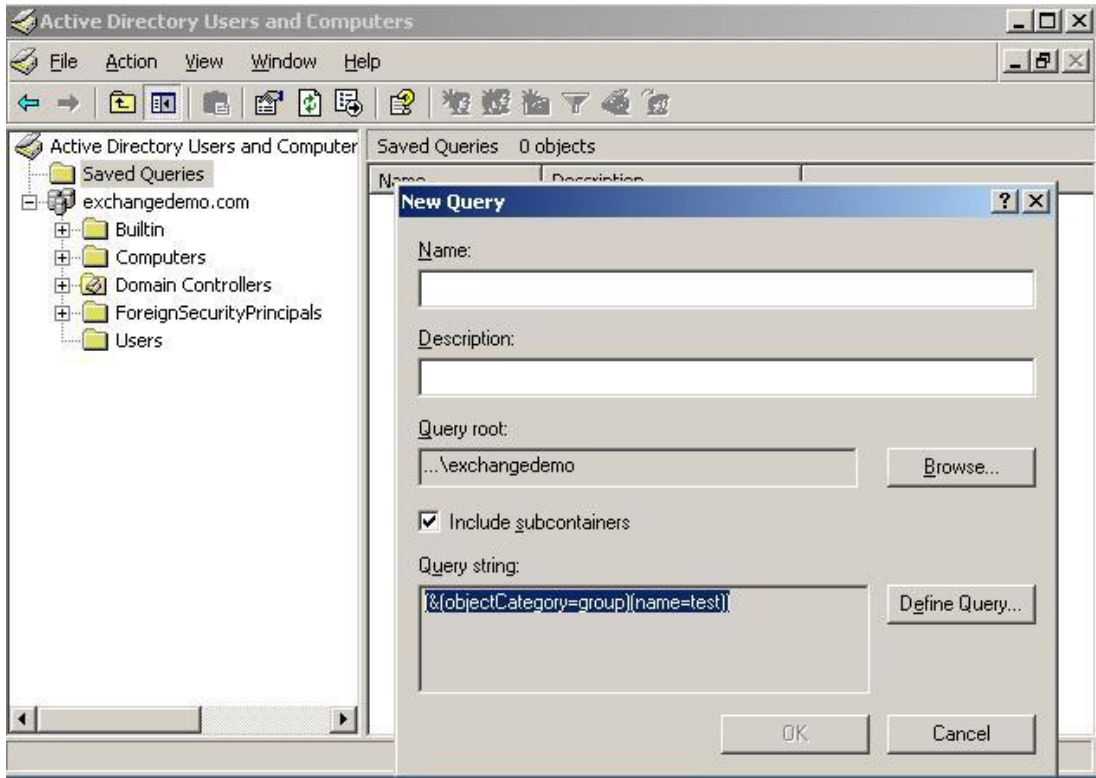
Chapter 4   Archiving Rules

You can configure rules that tell how EEA archives emails and how EEA manages individual mailboxes. In this chapter, we will explain how to set up EEA to archive emails for your corporate email messaging systems. We will show how to use Stub to reduce storage size for individual user's mailbox on the email server. We also show how to use Retention to setup the email information retention policy and manage the corporate email data lifecycle.

Different companies have different messaging environments that varies based on many factors; number of employees, networking settings, type of email servers, and whether it's hosting email server or in-house email server, etc. MessageSolution provides a number of archiving options that enable enterprises to archive in all different messaging environments.

EEA supports three methods for archiving: SMTP archiving, real-time archiving, and scheduled archiving. We recommend you only use one of these methods at a time. They serve different purposes. You should choose carefully as to which method to use. Normally, the decision for which method to use depends on the type of email server you are using, whether you need to comply with some regulations, and if you want to use Mailbox Manager.

Note: By default, after installation, all the archiving rules and mailbox manager are not active. Administrator needs to configure and enable these rules.

4.1   SMTP Archiving

SMTP Archiving is normally used for non-Exchange Server environment or if the email server is in hosting service and you cannot access to it other than through SMTP protocols. In this case, you can use SMTP Archiving to accept forwarded emails by the email server and save a copy in the archive.

In order to archive emails based on SMTP protocol for SMTP Archiving, you also need to configure SMTP Connection. Refer to section 3.1.4 on how to configure SMTP Connection.

To configure EEA for SMTP archiving:

1. Click on SMTP Archiving on the left menu.
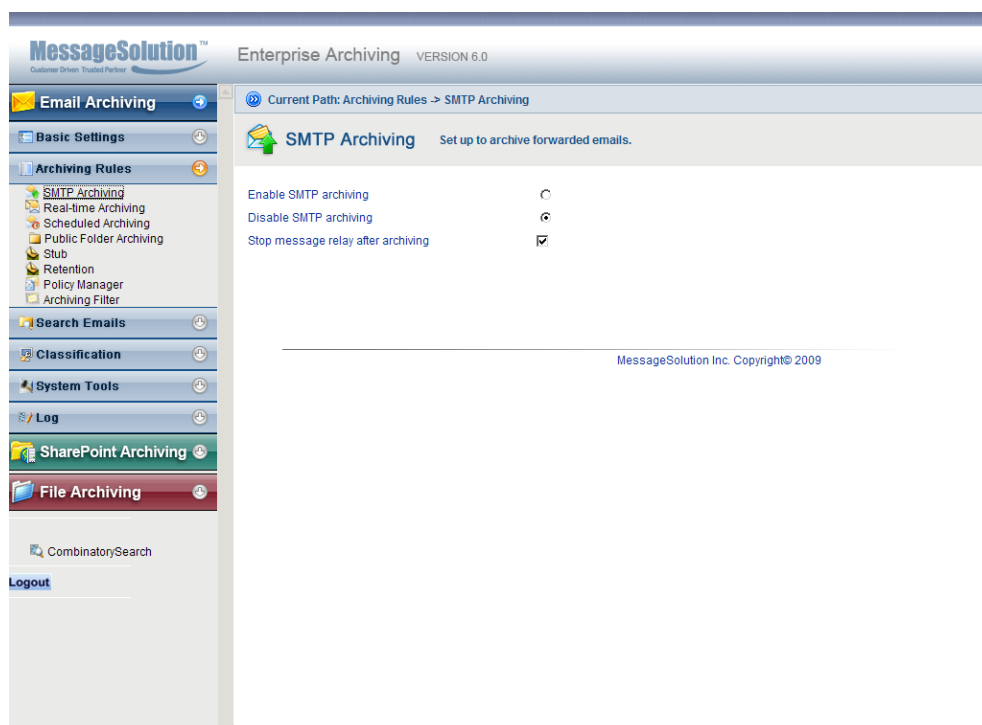
2. Select Enable SMTP archiving and Submit the page. If SMTP Connection is configured correctly, EEA will immediately start archiving emails that are forwarded by the email servers.

4.2   Real-time Archiving

Real-time Archiving is suitable for organizations that need to be compliant with regulations that require them to capture all email communications, and for companies that want to save all email communications. Organizations need to use real-time archiving which stores a copy of every email as email enters and leaves users' mailbox (except disabled archiving users). The advantage of real-time archiving is it helps organizations meet the regulatory compliance requirements. You can also use real-time archiving in connection with Stub and Retention for managing each individual mailbox for Exchange Server and Domino Server environment.

Emails archived by real-time archiving process are also indexed and ready for searching. Therefore, mailbox users are still able to search through and view these archived emails. Only the owner of the email or users with administrator permission can access archived emails.

EEA utilizes email server's journaling capability for real-time archiving. Please refer to section 2.3 on how to setup Exchange Server and Active Directory for real-time archiving. For other types of email server, refer to their manual to setup a journal mailbox.

To configure EEA to support real-time archiving:

1. Configure email server to store emails in the journal mailbox account;

2. On the left menu bar, click Real-time Archiving link;
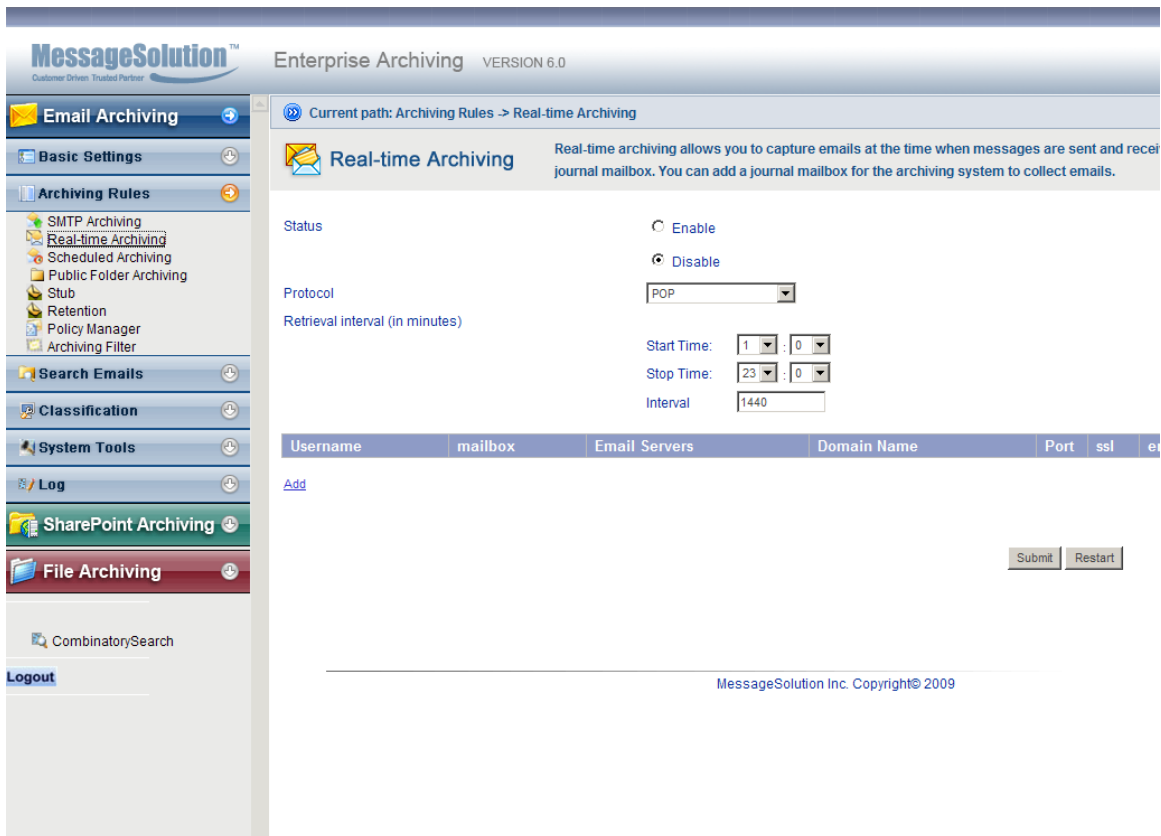
3. On this screen, you can enable/disable real-time archiving. EEA periodically pulls data from email server. If a real-time archiving is in progress, disabling it will not stop the current in-progress archiving activity.

4. Select a proper protocol for retrieving emails from the target email server.

Note: When you select a protocol, it must be consistent with the port number in Email Servers setting in section 3.1.6. For example, if you choose to use IMAP protocol, the email server configuration should use port 143.

5. Arrange start time to run the real-time archiving if it is enabled.

6. Stop Archiving allows you to stop the archiving process at a specific time if the archiving is not finished. This is useful if you do not want the archiving process to affect email users during regular office hours.

7. Enter a time interval between each pull from the email server. The interval length should be based on your email volume. General practice is to wait for the mailbox to grow to a few hundred emails before

starting to pull. However, EEA is designed with massive scalability. With Pop and WebDAV and CDO protocols, it can pull data and archive them at a speed of 20-50 messages per second for typical sized emails. IMAP and Domino are slightly slower.

8. Clicking submit will start real-time when you complete real-time configuration.

9. Click restart will immediately run the real-time archiving, but if other real-time archiving is running it will not work.

10. Click Add to add the journal mailbox account;

11. Config journal account information: User Name, Password, Mailbox, Email Server, Domain, Port, Archiving Method, ssl, Delete and envelope

12. In this section enter the appropriate information for journal account. The "Name" field is a journal account user name. Password is current journal account password Mailbox is which folder we need to pulls the email (most time we just need to input "inbox").Email Servers is the email server's hostname or IP address. "Domain" is the corporate email server domain. The EEA uses "Port" to access the email server and the default port is 80 or HTTP protocol. For POP3 the port is 110 and for IMAP it should be 143. "Archiving Method" is where the protocol is selected for each email server. Exchange WebDAV is typically selected for Exchange 2000 and 2003.NotesCom is selected for the entire domino version, but if NotesCom is selected the MessageSolution Domino Connector must be installed (refer the installation steps for the MessageSolution Domino Connector). SSL connections can be selected to retrieve emails from the email server using a secure connection and SSL will require a different port number and should be changed accordingly. "Delete" can be selected to remove the messages from journal mailbox after EEA retrieves them. Be aware the journal mailbox may grow very fast if you do not let EEA clean it up. If you have enabled Exchange to use Envelope Journaling (refer to section 2.4.2), you should select the envelope. If you do not enable Envelope Journaling in Exchange, that means emails in the journal mailbox are just regular emails without the extra Bcc and Distribution List information, then you don't need to select "envelope". After entering the appropriate information click on "Submit" to save the email server settings.

4.3   Scheduled Archiving

Scheduled Archiving is suitable for archiving existing historical emails that are currently in your Exchange or Domino servers. You can enable/disable archiving, set what time of a day to archive or which day of the week to archive, how old the emails age before they get archived or you can select a time period to get archived. The advantage to use this archiving method is that emails are archived with more information pertaining to each individual mailbox, such as what folder the email is in. With this additional mailbox information, EEA is able to provide many powerful features such as same folder structure when viewing the messages online, restore emails to their original location, schedule to cleanup old emails from Exchange Server for individual mailbox, etc.

Most of the time, corporate users create personal folders in Outlook to categorize emails to easily manage mailboxes. However, after the emails are archived, if without the folder information, all the thousands of emails are in one big flat view, it will be extremely difficult to manage. Also, Scheduled Archiving method gives the user some time to clean up the mailbox by deleting spam and virus emails before the archiving service start storing data. In this way it only archives the important emails.

Since scheduled archiving depends on the availability of Exchange mailbox users and their email folders, you need to setup Active Directory Service and Exchange Server. Please refer to section 2.3 on how to setup Exchange Server and Active Directory Service to get ready for scheduled archiving. You also need to setup Authentication Servers in EEA in order to retrieve users and folders information. Please refer to section 3.1.7 on how to setup Authentication Servers.

To configure **Scheduled Archiving** rule:

1. On the left menu bar, click Scheduled Archiving link.

2. Disable will stop EEA archive service.

3. Schedule the archiving. If you select every day, the "Day of week" field will be ignored. The recommended practice is to schedule a daily archiving during off-hour.

4. Stop Archiving allows you to stop the archiving process at a specific time if the archiving is not finished. This is useful if you do not want the archiving process to affect email users during regular office hours.

5. Archive Message Time access to set a time period to archive specified period of time e-mail.(0 means archive all email begin set begin time)

6. Enter a number in "Archive messages that are more than" for the number of days the email has aged before getting archived.

7. Enter a number in "Archiving messages with size above" for emails exceeding this size before getting archived.

8. If checking "Archiving messages with attachment only" checkbox, you will only archive emails with attachments.

9. Check "Archive from Delete Retention" checkbox if you have set up Exchange Server to keep deleted items in Delete Retention and want to archive them. This option is only available for Exchange Server environment.

10. After you enabled the Scheduled Archiving and saved the page, a checkbox at the bottom that allows you to "Perform archiving now" will show. Check this box and Submit the page will kick off the archiving process immediately. Then you can go to Archive Status in the Log section to see the archive progress.

11. The Test button will test archive 5 messages.

12. Click **Submit** to save the configuration.

Note: the initial scheduled archiving may take a long time to finish if you have many old emails in the email server. EEA does not index the new emails until this round of archiving finishes; therefore, you can't search them. In order to see the archiving result, we recommend setting the email archiving age to a bigger number, for instance 700 days, so it will not need to pull too much data during your initial testing. Please make sure you do have emails older than that number. EEA Scheduled Archiving is an incremental process, which means it only archives the unarchived emails.

4.4   Public Folders Archiving

EEA allows you to archive items in Public Folders for Exchange Server environment. The archived Public Folders items have two permission types: only administrator can view or everyone can view.

Public Folders archiving process is executed every time Real-time Archiving or Scheduled Archiving process is run.

To configure Public Folders Archiving:

1. On the left menu bar, click Public Folders Archiving link.
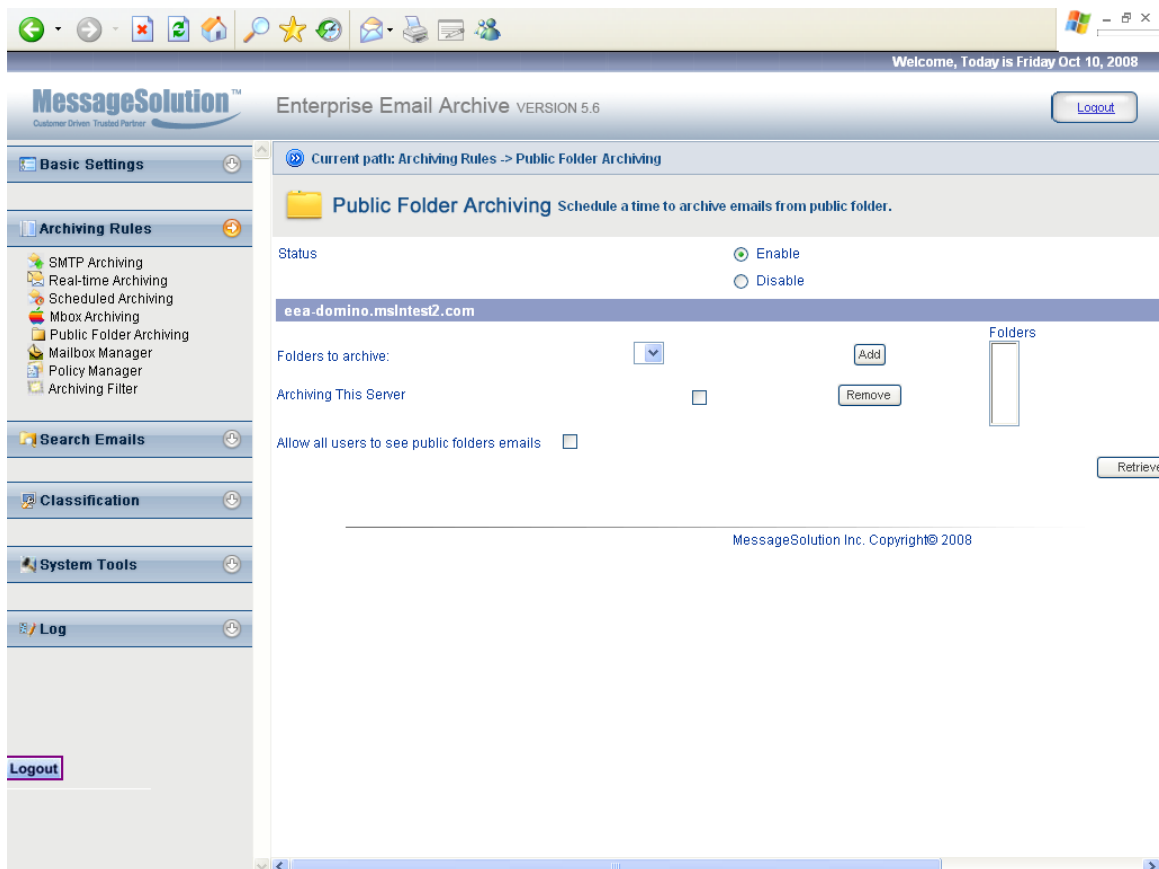
2. Select enable/disable to enable or disable archiving for public folders.

3. If your Exchange environment has multiple servers, you can select which server to be archived by checking "Archive this Server" check box.

4. Click on Retrieve Folders to populate folders available for archiving from Exchange Server. By default, all folders retrieved from Exchange Server will be archived. You can select the folder name on the selection list on the right and click on Remove button to exclude it from archiving.

5. Click on "Submit" to save the setting.

4.5 Stubbing

MessageSolution EEA's Stub feature provides users with flexible settings to manage individual user's mailbox. You can use Stub policy to reduce storage size on the email servers, and help users to keep their mailboxes clean and virtually never exceed their quota.

The major benefits Stub brings to corporate users are automated mailbox management for cleaning up user's mailbox, offload email server load to the archiving system, eliminate user quota limitation, and increase overall IT administrator and employees' productivity. To retrieve entire email data including attachments, user needs to have Outlook/Lotus Notes/GroupWise client plugin.

To configure **Stub**:

1. Click on Stub on the left menu. Stub will apply to mailboxes that have archiving enabled.

2. You can enable or disable Stub.

3. Stub Message Time access is to set a time period to stub specified period of time e-mail.(0 means never stub from mailbox in the email server)

4. Enter a number to stub emails above this size.

5. Set stub keep word size, for example 50, still keep 50 words.

6. Enable the checkbox for "Only stub message with attachment" according to your requirements.

7. By default, content of emails will be removed during stub process. You can uncheck "Stub message content" box if you want to keep the content.

8. MailBox Manager Schedule access to schedule multi- time period to run the stub process.

9. You can check the "Perform stub now" check box at the bottom. The system will immediately perform all the mailbox management actions if you check this box. By default, mailbox manager process is scheduled to always run at midnight.

4.6 Retention

Retention manages the email data lifecycle on the email server(s) and archiving system.

1. You can enable or disable retention.

2. Retention Message Time access to schedule time period to processing specify time period email (0 means never retention).

3. Remove message from archive. (0 means never remove from archive).

4. Move archived messages to secondary repository. (0 means never move).

5. Schedule a time to archive every day or week.

6. Retention access schedule multi- time period to run it.

7. You can check the "Perform mailbox manage now" checkbox at the bottom. The system will immediately perform all the mailbox management actions if you check this box. By default, mailbox manager process is scheduled to always run at midnight.

4.7   Policy Manager

Administrator can create archiving policies and apply these policies to different groups of users. For instance, you can create a policy to keep emails in the archive longer for Finance department.

To configure **Policy Manager**:

1. Click on Policy Manager on the left menu. Click on Add button to create a policy or edit to modify an existing policy.

2. Choose a policy type, user/group policy, server policy or folder policy, for example, user/group policy.

3. Enter a name for the policy, for example, "Finance Department policy".

4. Add user or group, both of them need to be in the AD server.

5. Stub user's mailbox more than, when the user's mail box more than %, for example 50%, it will be stubbed.

6. Stop stubbing user's mailbox less than, when the user's mailbox less than %, for example 30%, stop stubbing.

7. Choose an existing folder policy to add or remove it, this will use set folder policy.

8. If edit archiving policy and stub policy is chosen, this setting can be used.

9. Set archive messages that are more than one day, begin archiving messages that are more than that day.

10. Set archive messages that are more than one day old (we recommend more than 2 days), 0 day means archiving all mail.

11. Set archive messages that are more than one KB, (only archive messages above this size), 0 size means archiving all mail.

12. Only archive with attachment mail, when choosing archive messages with attachment only button.

13. Set stub message begin at one day, will be started that day.

14. Set stub message one day old, (0 means do not stub). Stubbing removes attachments and minimizes the content on the email server.

15. Set stub message size, for example 100KB, (only stub messages above this size)

16. Set stub keep word size, for example 50, still keep 50 word.

17. Add a new stub policy or remove an existing stub policy.

18. Only stub with attachment, when choosing only stub message with attachment button.

19. Only stub message content, when choosing Stub message content.

20. Create a URL link in the stubbed message, when choosing Create a URL link in the stubbed message button.

21. Choose edit retention policy button and it will be used in this setting.

22. Set remove message from server one day, and it will be begin removing messages from server that day.

23. Set remove message from server one day old, (0 means never remove from email server).

24. Set remove message from server %, (start removing from email server when above this percentage), for example 50%.

25. Set remove message from server %, (stop removing from email server when below this percentage), for example 30%.

26. Set remove message from archive one days old, (0 means never remove from archive),for example,10,

27. And 2555 is default.

28. Choose a policy type is server policy.

29. Choose an existing server to add or remove, it's retrieved by Authentication Servers.

30. Other policy setting set the same as user/group policy.

31. Choose a policy type is folder policy.(every policy based folder policy)

32. Set folder name: check this box to create folders for archiving enabled users. Enter folder name, or add or remove an existing folder in the email server.

33. Not archived: choose folders, and check this box not to archive folders.

34. Other policy setting to be set the same as user/group policy.

35. After policy is set, it can be displayed or searched on the policy page like this.

36. Search by policy type, user/group, and server or folder policy.

37. Record per page by 10, 20, 50 or all.

38. Search by policy name.

39. Add a new policy or delete, edit an existing policy.

4.8   Archiving Filter

Sometimes organizations do not want to archive certain emails such as junk emails and unimportant emails. EEA provides a filtering mechanism for administrators to specify what kind of emails not to archive. This mechanism can also be used to archive emails to designated repository based on email characteristics.

To configure **Archiving Filter**, click on **Archiving Filter** link on the left menu. Click on Add button to create a filter or edit to modify an existing filter.

Chapter 5   Search & Access Emails

EEA's built-in search engine provides a powerful search tool to deliver fast and accurate search results. It enables email users to quickly find the information they are looking for. Email data discovery helps in the following areas:

- With EEA, email data is always online and accessible. It eliminates the need for backing up emails to PST files, loading back to Outlook and searching through PST files, and makes email management centralized, therefore, increase overall organizational productivity.

- In the event of legal dispute, you can quickly produce the evidence the judge is asking for without incurring a high cost due to long hours of loading data from backup and searching through them that may require a large number of employees' involvement. In some cases, companies have to hire a third party consulting firm to help discover the data, and the cost can mount to millions of dollars. With EEA, you do not need to do this anymore. EEA's comprehensive search tool will search through millions of emails in a matter of seconds. Then you can print the emails and present to the inquirer.

5.1   Search

To search for emails in the archive:

1. On the left menu bar, click on **Archive** link in the Search Emails section. This should open up a search interface on the right.
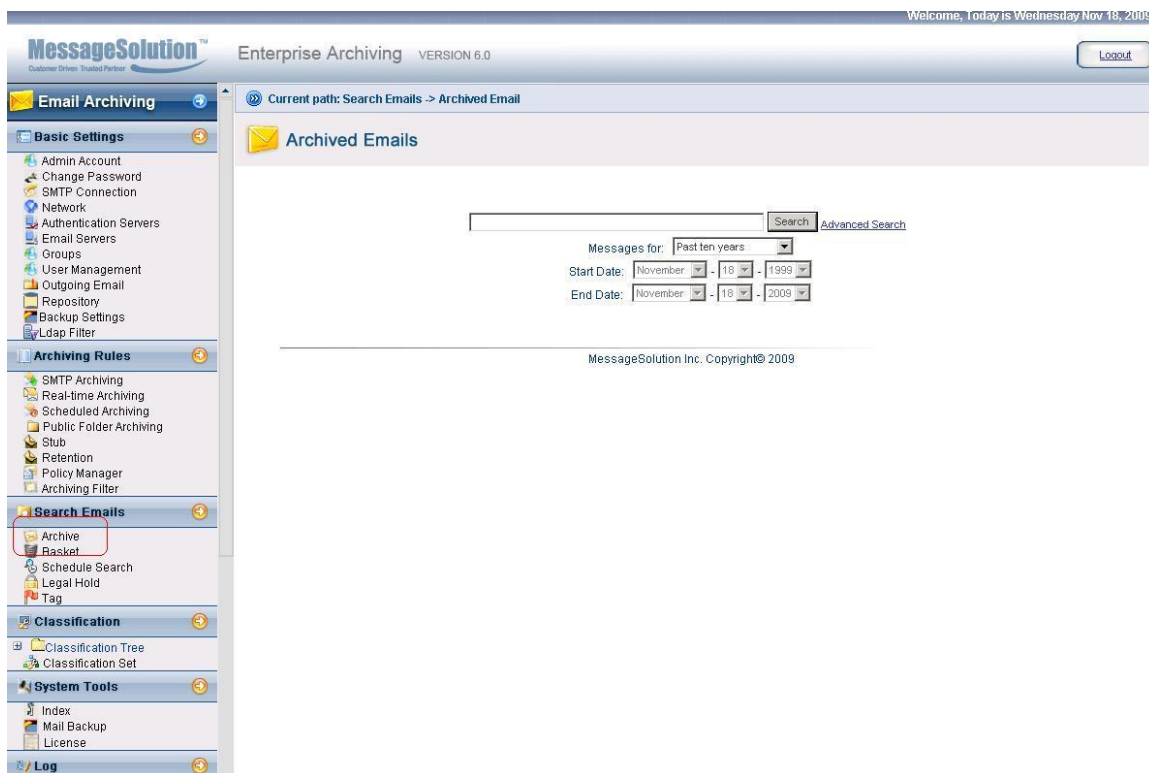
2. EEA provides quick search and advanced search UI. In quick search page, the condition you specify will search in subject, content, attachment, sender, and recipients. If you need to specify more criteria you can use advanced search.
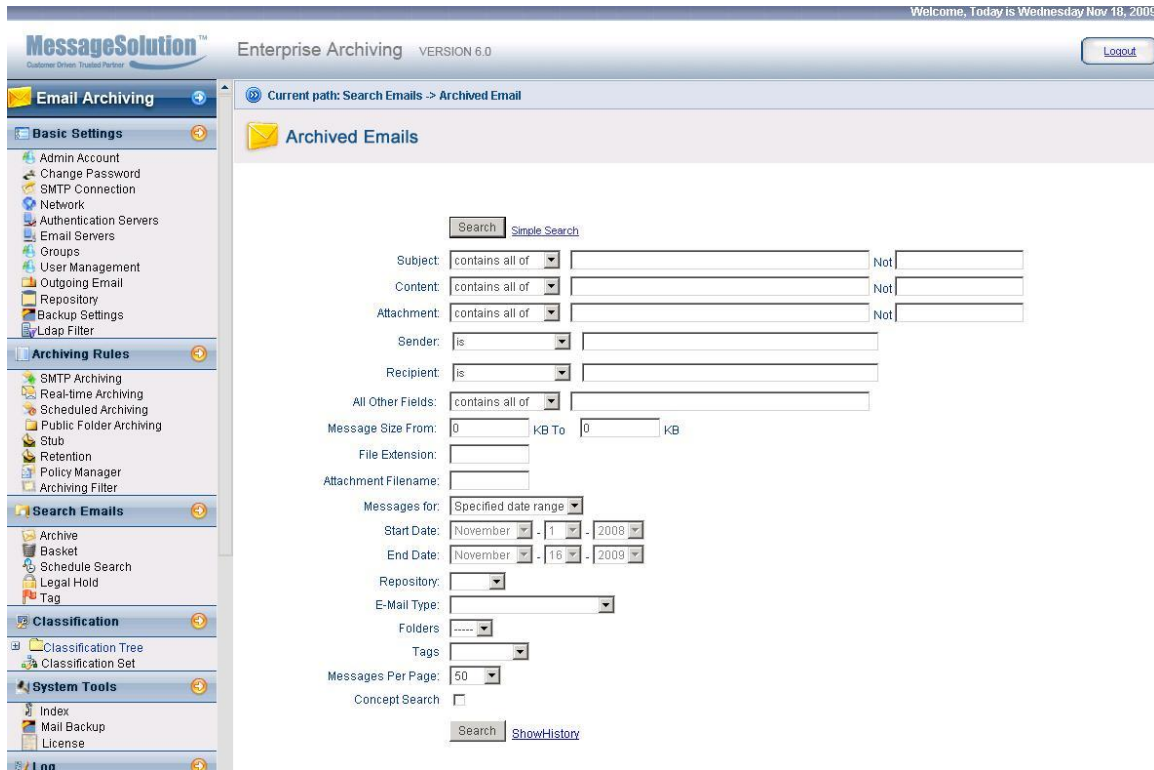
3. Advanced Search provides a very comprehensive interface to allow users to define their search criteria. You can search by any field in the email: subject, content and attachment, sender, recipients, message size, attachment file extension, and date.

4. Enter keywords or phrase in Subject field. EEA supports keywords search, phrase, and proximity search. Besides that, you can search by starts with and ends with. Also you can search 'not' which not contained in Subject.

5. Enter keywords or phrase in Content field. EEA supports keywords search, phrase, and proximity search. Also you can search 'not' which not contained in Content.

6. Enter keywords or phrase in Attachment field. EEA supports keywords search, phrase, and proximity search. also you can   search 'not' which not contained in Attachment   EEA supports all popular attachment file type such as Microsoft Word, Excel, PowerPoint, Adobe PDF, HTML, XML, plain text, etc.

7. Enter complete email address or partial email address in Sender and Recipient fields to search by address. Besides searching by address, you can also search by sender/recipient's first and/or last name, just enter first and/or last name in the Sender and Recipient fields. And you can search by wild card (*) search. Such as if you want to search john, you can search 'jo' in wild card (*) search.

8. You can search by subject, content, attachment, sender, recipients by specifying in "All Other Fields" textbox.

9. You can search by size. For example, enter "100" and "1000" in Message Size from field to search email size between 100KB and 1MB. If you want to search messages with size above 2MB, you can enter 2000 in From field and a large number, 500000 for instance (500MB), in To field.

10. You can search by attachment file extension. If you know the email you want to search contains attachment with a Word file, you can enter doc in the field.

11. "Messages for" field is for specifying the search time range. The default time range is one year. You can select from the list of pre-defined time range or you can pick your own time range in Start Date and End Date.

12. You can search in any specific repository if you have multiple repositories available. By default, it searches through all repositories.

13. "E-mail Type" allows you to include searching for Public Folders emails. Default search does not include Public Folders items.

14. "Folders" allow you to search by each folders emails. Such as searching by inbox.

15. The EEA Tagging feature would allow the user to 'tag' any message for easy visual identification with a variety of default tags, or custom tags created by each user.

16. Default search result shows 50 messages per page. You can select a different number. The maximum is 1,000 per page.

17. "Concept Search". Choose this option to let EEA search engine find related information for the meaning of the search condition.

18. The returned list messages can be sorted by click on the column header: Sender, Recipient, Subject, Date, or Size.

19. EEA provides Saved Search function. You can save this search criteria and use it in Advanced Search screen.

20. Click Show History, you can search which you saved in save search.

5.2 Search Within Search Result

Sometimes due to loose search criteria, a search can return a large number of items. EEA Search engine allows users to narrow down the search by running another search within last search result. To search within search result:

1. After conducting a search, in the search result page, scroll down to the bottom of the page, click on "Search Within Result" button. It will lead the user to the Search page.

2. Users can enter another set of search criteria, then press Submit button. EEA will search with the new criteria on the old search result.

5.3 Send Emails

Administrator can select emails from the search result and send to other mailbox.

1. After conducting a search, in the search result page, check the box on the left of each email, enter an email address then click on Send To button.

2. Selected emails will be zipped up and each email is in EML format and sent to the destination. You can send these emails to internal and external email address.

Note: sometimes emails are not received after sending out the emails. This could be due to DNS not properly configured on the archiving server. Or administrator can configure an MTA for relaying emails. You can learn MTA for relay in section 3.1.10.

5.4 Download Emails

User can select emails from the search result and download to local computer.

Selected emails will be zipped and downloaded to local computer in EML format. User can open the zip file and click on the file to launch a Mime email message viewer such as Outlook Express to view the email. This can be done for up to 1,000 emails at one time.

5.5 Restore

User can select emails from the search result and restore them back to email server mailbox.
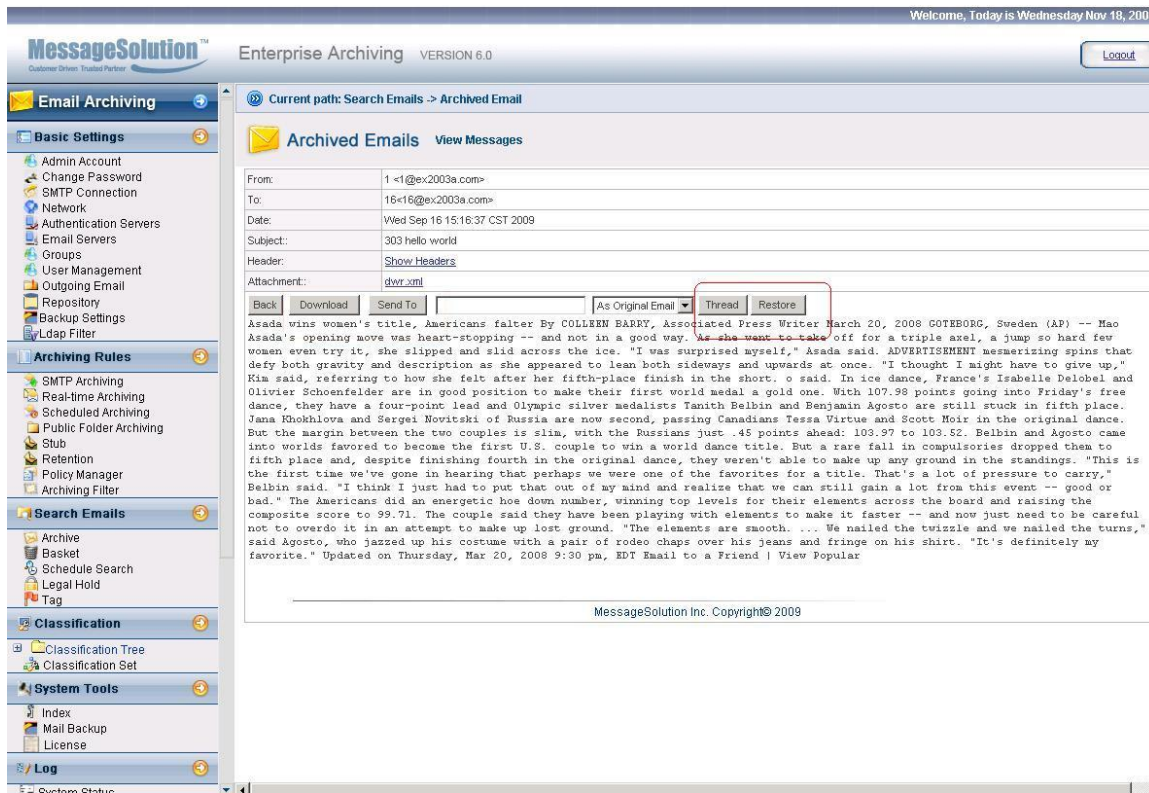
5.6 Thread Index

User can select emails from the search result and list all conversation thread.

5.7 Basket

Users can select emails from the search result and have the selected emails saved in a "Basket" created by the user to group emails together for easy viewing or downloading.

Selected emails will be stored in one location under the designated Basket name and from there they can be viewed, downloaded, sent to a valid email address or removed from the Basket.

5.8   Schedule Search

Users can specify search criteria based on Subject, Content, Attachment, Sender, Recipient, All Other Fields, Message Size, File Extension, and Attachment Filename together with setting a time to run then using the Schedule Search feature, the EEA will automatically run the search at the specified time and email the search results to a valid email address.

5.9 Legal Hold

With Legal Hold the EEA allows the normal retention policy to be extended for a period of time without modifying the Retention Policy of the system to include more data than is necessary for this research/investigation. Legal Hold is created on an as needed basis and gathers all the data into one convenient location where they can be viewed, downloaded for analysis, or mailed to a remote party for further analysis. The administrator or view only admin has the option to view, make a notation on the description for reference, download, email, or release the files from Legal Hold, but can not directly delete any files placed on this hold. Legal hold files are visible to the administrator but to the end user there is no indication that any file(s) are placed on hold.

1. To place a file on Legal Hold select the desired file(s) from within the search results

2. Scroll to the bottom of the page and select the name of the Legal Hold to be applied to the selected files

3. If there are no Holds currently on the system or if you would like to create a new one simply select the file(s) to be placed on this hold and click directly on the HOLD button

4. Fill in the name, how long the files should be held beyond the current retention policy set in the EEA, or choose "Forever" by clicking in the appropriate box, then fill in a description for this hold.

5. Click "Submit" to save the changes.

Welcome, Today is Wednesday Nov 18, 2009

MessageSolution™
Customer Driven. Trusted Partner

Enterprise Archiving VERSION 6.0   Logout

Email Archiving

Basic Settings
- Admin Account
- Change Password
- SMTP Connection
- Network
- Authentication Servers
- Email Servers
- Groups
- User Management
- Outgoing Email
- Repository
- Backup Settings
- Ldap Filter

Archiving Rules
- SMTP Archiving
- Real-time Archiving
- Scheduled Archiving
- Public Folder Archiving
- Stub
- Retention
- Policy Manager
- Archiving Filter

Search Emails
- Archive
- Basket
- Schedule Search
- Legal Hold
- Tag

Classification
- Classification Tree
- Classification Set

System Tools
- Index
- Mail Backup
- License

1@ex2003a.com	16@ex2003a.com	267 hello world	edit	2009-09-16 15:16	28.3KB
1@ex2003a.com	16@ex2003a.com	266 hello world	edit	2009-09-16 15:16	9.0KB
1@ex2003a.com	16@ex2003a.com	270 hello world	edit	2009-09-16 15:16	58.9KB
1@ex2003a.com	16@ex2003a.com	269 hello world	edit	2009-09-16 15:16	14.6KB
1@ex2003a.com	16@ex2003a.com	271 hello world	edit	2009-09-16 15:16	7.2KB
1@ex2003a.com	16@ex2003a.com	275 hello world	edit	2009-09-16 15:16	35.5KB
1@ex2003a.com	16@ex2003a.com	274 hello world	edit	2009-09-16 15:16	364.3KB
1@ex2003a.com	16@ex2003a.com	272 hello world	edit	2009-09-16 15:16	34.4KB
1@ex2003a.com	16@ex2003a.com	276 hello world	edit	2009-09-16 15:16	7.2KB
1@ex2003a.com	16@ex2003a.com	278 hello world	edit	2009-09-16 15:16	25.5KB
1@ex2003a.com	16@ex2003a.com	277 hello world	edit	2009-09-16 15:16	133.4KB
1@ex2003a.com	16@ex2003a.com	282 hello world	edit	2009-09-16 15:16	10.9KB
1@ex2003a.com	16@ex2003a.com	280 hello world	edit	2009-09-16 15:16	152.1KB
1@ex2003a.com	16@ex2003a.com	281 hello world	edit	2009-09-16 15:16	133.4KB
1@ex2003a.com	16@ex2003a.com	279 hello world	edit	2009-09-16 15:16	382.4KB
1@ex2003a.com	16@ex2003a.com	283 hello world	edit	2009-09-16 15:16	32.7KB
1@ex2003a.com	16@ex2003a.com	284 hello world	edit	2009-09-16 15:16	366.7KB
1@ex2003a.com	16@ex2003a.com	287 hello world	edit	2009-09-16 15:16	34.9KB
1@ex2003a.com	16@ex2003a.com	286 hello world	edit	2009-09-16 15:16	368.9KB
1@ex2003a.com	16@ex2003a.com	285 hello world	edit	2009-09-16 15:16	7.2KB
1@ex2003a.com	16@ex2003a.com	288 hello world	edit	2009-09-16 15:16	170.2KB
1@ex2003a.com	16@ex2003a.com	291 hello world	edit	2009-09-16 15:16	364.3KB

5.11   Tagging

The EEA provides convenient options for the administrator or review team to divide their search results. The EEA Tagging feature would allow the user to 'tag' any message for easy visual identification with a variety of default tags, or custom tags created by each user. Either option will allow the review team/user the ability to quickly glance at the "Tag" and get a quick understanding of what needs to be done, or has been done, with the data in question. The user can choose from Confidential, Personal, Reviewed, Privileged, Responsive, or NotifyHR tags and apply them to any selected email(s).

Welcome, Today is Wednesday Nov 18, 2009

MessageSolution™
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Enterprise Archiving VERSION 6.0   Logout

Current path: Search Emails -> Email Tag

Tag

Tag Name	Email Count	Email Info	Tag Info	☐
Confidential	0	Detail	View	☐
Personal	0	Detail	View	☐
Reviewed	0	Detail	View	☐
Privileged	0	Detail	View	☐
Responsive	0	Detail	View	☐
NotifyHR	0	Detail	View	☐

Add   Delete

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Chapter 6   Classification

The need for classification of documents starts with the user attempting to classify or arrange their email in different folders and sub-folders to make "order" out of their chaotic email INBOX. This need to make "sense" out of each environment has extended to the user's need to 'manage' their email data, both in their mailbox and from within the EEA archive, in a manner that is most convenient and easily understood by that user. In addition, for litigation support/e-discovery it may be necessary to classify groups of mails or even individual mails for ease of review/understanding by the legal/analytical teams.

6.1   Classification

The EEA would allow for custom classification of a group of emails where each item as it is classified is grouped together with other items sharing the same classification and each classification can then be edited or downloaded for offline review. Classifications are defined under "Classification Add" and configured for access under "Configuration Set". To view the Classification go to LOGS and select "Classification Chart".

1. Classifications can automatically be applied against Subject, Content, Attachment, Sender, Recipients, Owner, File Extension, and/or Message Size, along with fields defining the search timeframe, size of the messages to search and whether this Classification should be added or excluded from the Classification grouping.

2. Click Add Classification.

3. Each Classification can also grant access privileges to a select list of users for added security and control.
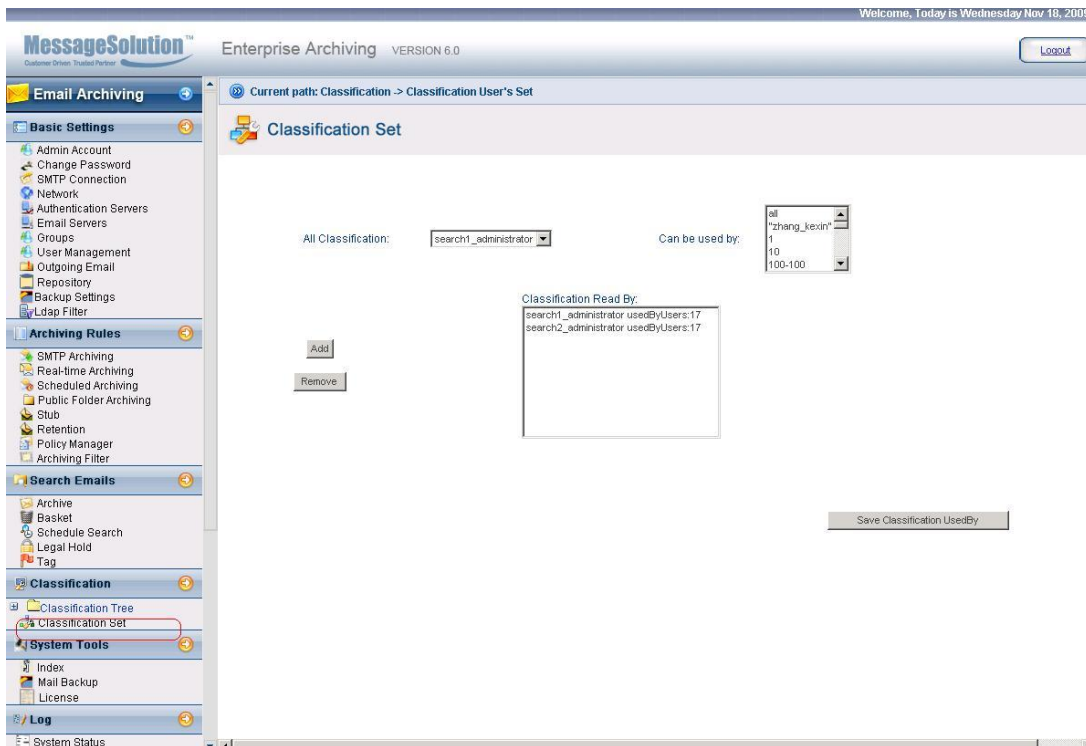
4. Each user can also add this classification by other users to search this user's email.
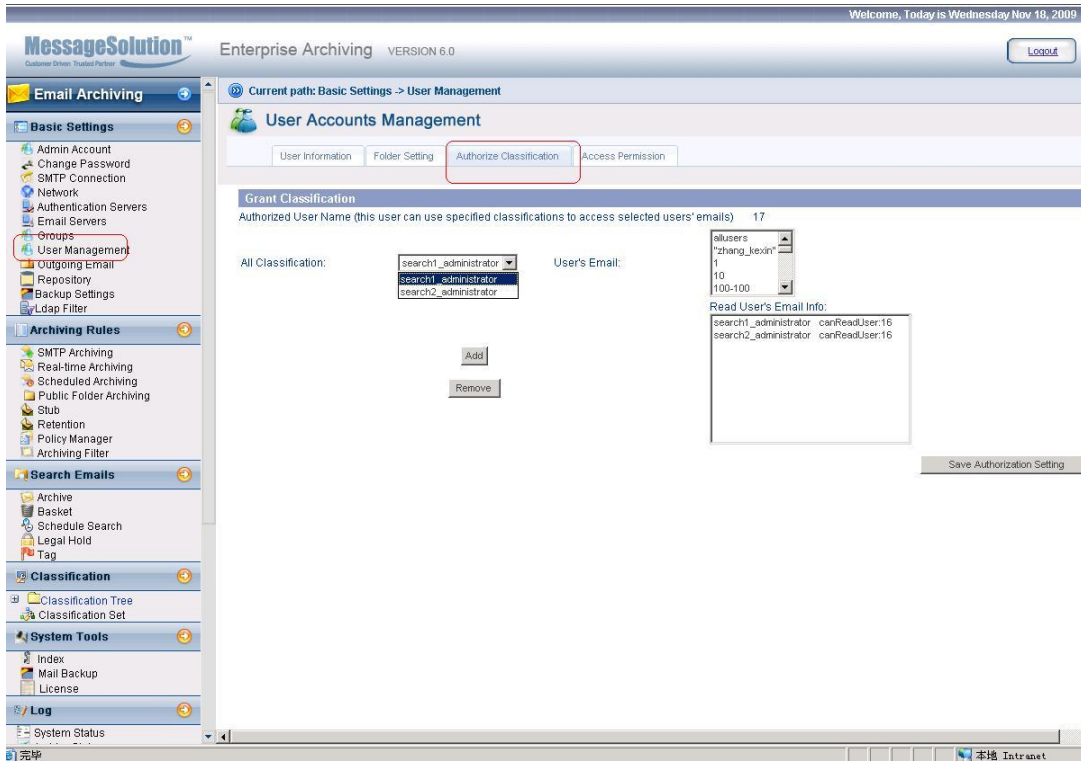
5. The EEA also provides a convenient method to view the Classifications using either a text or graphical representation.
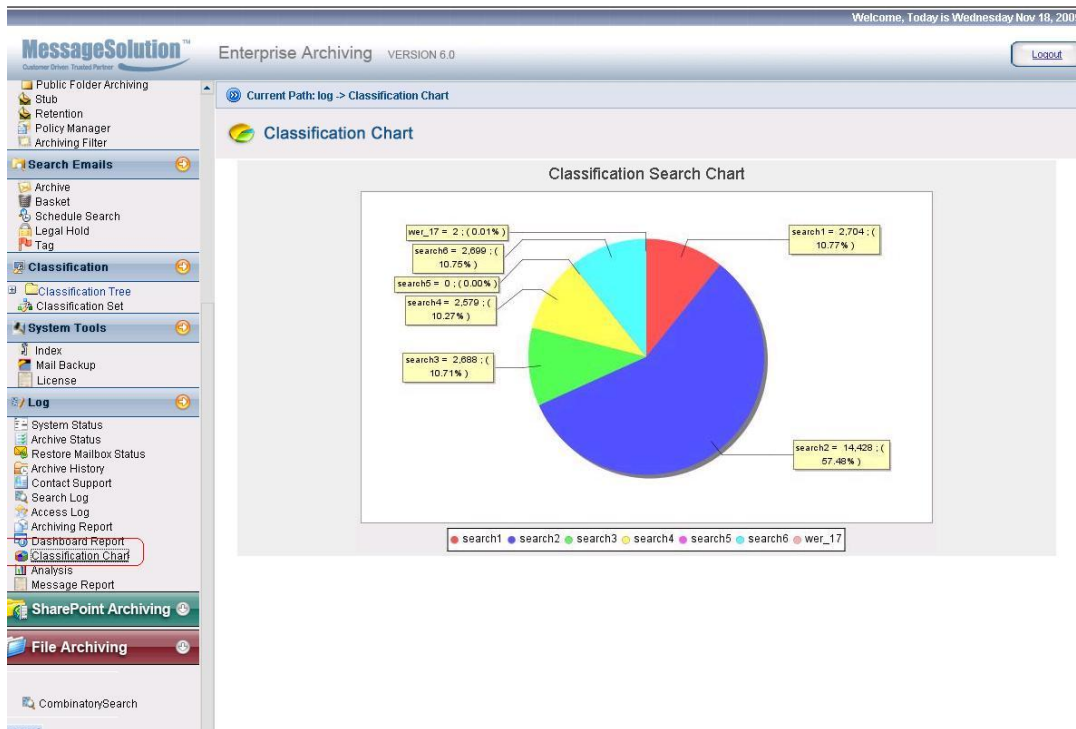
Chapter 7   System Tools

EEA provides system tools to maintain archiving system resources.

7.1   Index

1. Once in a while, the search engine index needs to be re-indexed due to system crash and unexpected errors. When searching emails, if you notice there might be some missing data, performing re-index could help the search functionality. On the left menu bar, click on **Index** link. The index is grouped by month. If the status for any month is "Unknown", it means the index contains no email for that period. "OK" status means it has at least some index for that period. "OK" status does not guarantee the index contains all the email information for that period. Therefore, if you suspect any possible missing data for that period, you should perform a re-index.

7.2 License

This screen shows the license details.

7.3 Data Redaction Settings

While the maintaining copies and records of un-alterable emails are critical for industry, federal or company compliance regulation, it must also be balanced with the need to protect sensitive information such as social security numbers, birthdates, credit card numbers and more.

Data Redaction is one of the advanced eDiscovery feature included in the MessageSolution Enterprise Email Archiving Platform. It works to redact or "black out" the sensitive information without compromising the integrity of the original email.

System Administrators can work with the MessageSolution Technical Support Team to customize and implement the parameters for their Data Redaction policies. For more information please contact you MessageSolution Representative for more information.

Welcome,rachel Today is Wednesday Apr

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Enterprise Email Archiving VERSION 6.0

- Email Archiving
- Basic Settings
- Archiving Rules
- Search Emails
- Classification
- System Tools
  - Index
  - License
  - Redaction Setting
- Log
- SharePoint Archiving
- File Archiving
- Combined Search
- Logout

Current Path: System Tools -> Redaction Setting

Redaction Setting

Name	Value	Regular Expression	Enable	Edit
credit card	xxxx-xxxx-xxxx-xxxx	\b\d{4}([^\d]?\d{4}){3}\b	T	Edit
richard			F	Edit
driver license	xxxxxxxx	\b\w\d{7}\b	T	Edit
American Express	xxxx xxxxxx xxxxx	\b\d{4}[^\d]?\d{6}[^\d]?\d{5}\b	T	Edit
SSN	xxx-xx-xxxx	\b\d{3}[^\d]?\d{2}[^\d]?\d{4}\b	T	Edit
Date of Birth	xx/xx/xxxx	\b[01]\d/[0123]\d/\d{4}\b	T	Edit

[Add] [Delete]

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Chapter 8   Log

EEA provides logging and audit trail for administrator to monitor the archiving system.

8.1   System Status

System Status page shows the up time for the archiving system, available storage space for the data storage attached to the archiving system, the number of emails that have been processed.

This screen shows the following information:

- the time EEA starts running

- disk space available on the machine

- the number of emails retrieved from email server

- EEA uses a buffer queue; it shows how much buffer space is still available

If the Buffer Space is decreasing and becoming smaller, it means there could be many emails unprocessed and the system may be under heavy load. When the buffer space reaches 0 space left, EEA will shutdown. In case EEA automatically shuts down due to large amount of unprocessed data, you can just restart EEA and EEA will automatically continue to process the data in the buffer space. You should stop the Real-time or Scheduled Archiving and let the unprocessed messages finish processing, then you can re-enable them.

8.2 Archive Status

This screen shows the ongoing or last finished Real-time Archiving, Scheduled Archiving, or Mailbox Manager process. It shows the process start and end time. It shows the number of emails being archived for Real-time Archiving and Scheduled Archiving, or number of mailboxes being managed for Mailbox Manager.

8.3 Archive History

The Archive History page will contain user specific information on the start and end time of each archived process performed for each listed user and any details from the archiving process.

8.4   Contact Support

In the Contact Support page, you can send the archiving system log files to techsupport@messagesolution.com. Our support team will process this information in a timely manner using the log files to help identify problems.

8.5 Search Log

Most of compliance regulations require companies to audit all activities conducted on the archived data. EEA logs all Search activities for archived emails. You can view all search activities.

The search log shows who has conducted the search, whose emails were being searched, search criteria such as Subject, Content, Sender, Recipients, etc.

User can click on "Frequent Search" button to view the top 10 searches.

User can use the Search Again link to launch that same search. This will save user's time to enter the same search criteria.

8.6 Access Log

Most of compliance regulations require companies to audit all access to archived emails. EEA keeps an audit trail for every access to archived email. You can browse and search access to archived emails.

To view or search the log for access to archived emails:

1. On the left menu bar, click **Access Report** link in the Log section. This should list all access to archived email including time, subject, the type of operation, etc. If the email still exists in the archive, it should have a URL link to show the message content. If the email has been permanently deleted from the archive, the Subject column only shows text.

8.7   Archiving Report

This report shows how many emails and how much data each user has in the archive. This report is updated once per day. You can narrow down the report by restraining the time frame.

8.8 Dashboard Report

Statistics:

Types of statistics 7. Each feature with a histogram display.
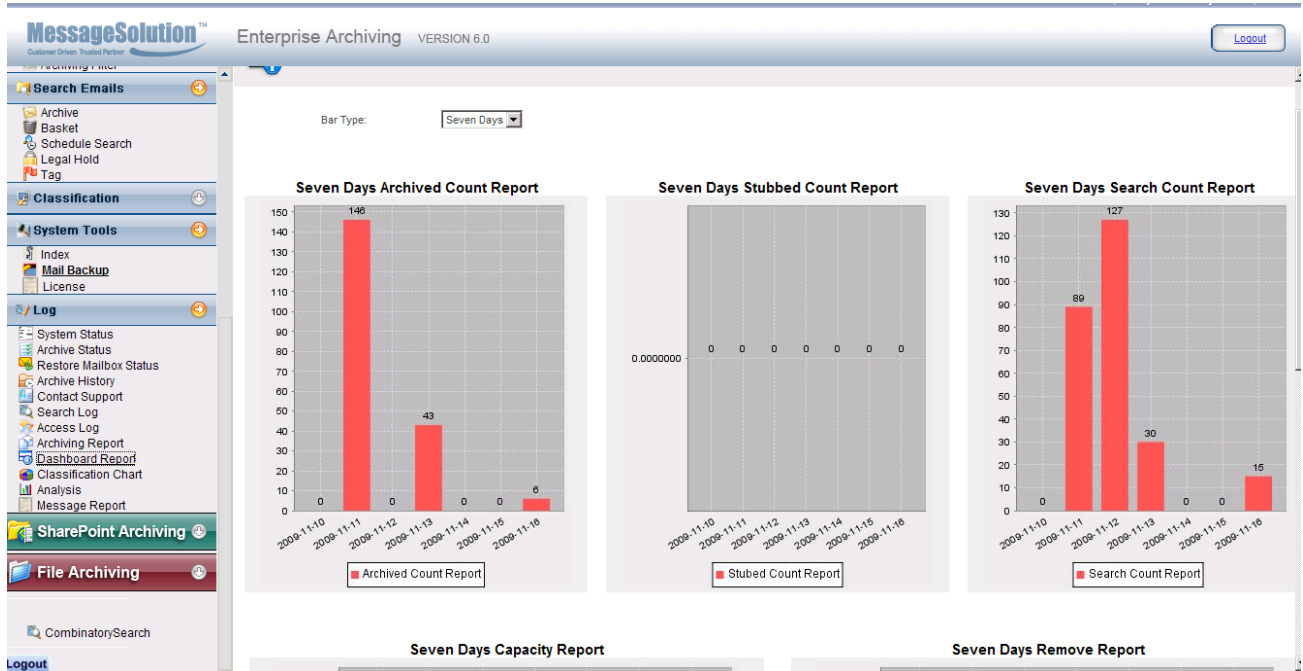
8.9 Classification Chart

Text or graphical display of any Classification Sets on the system which the logged in user has access rights for.
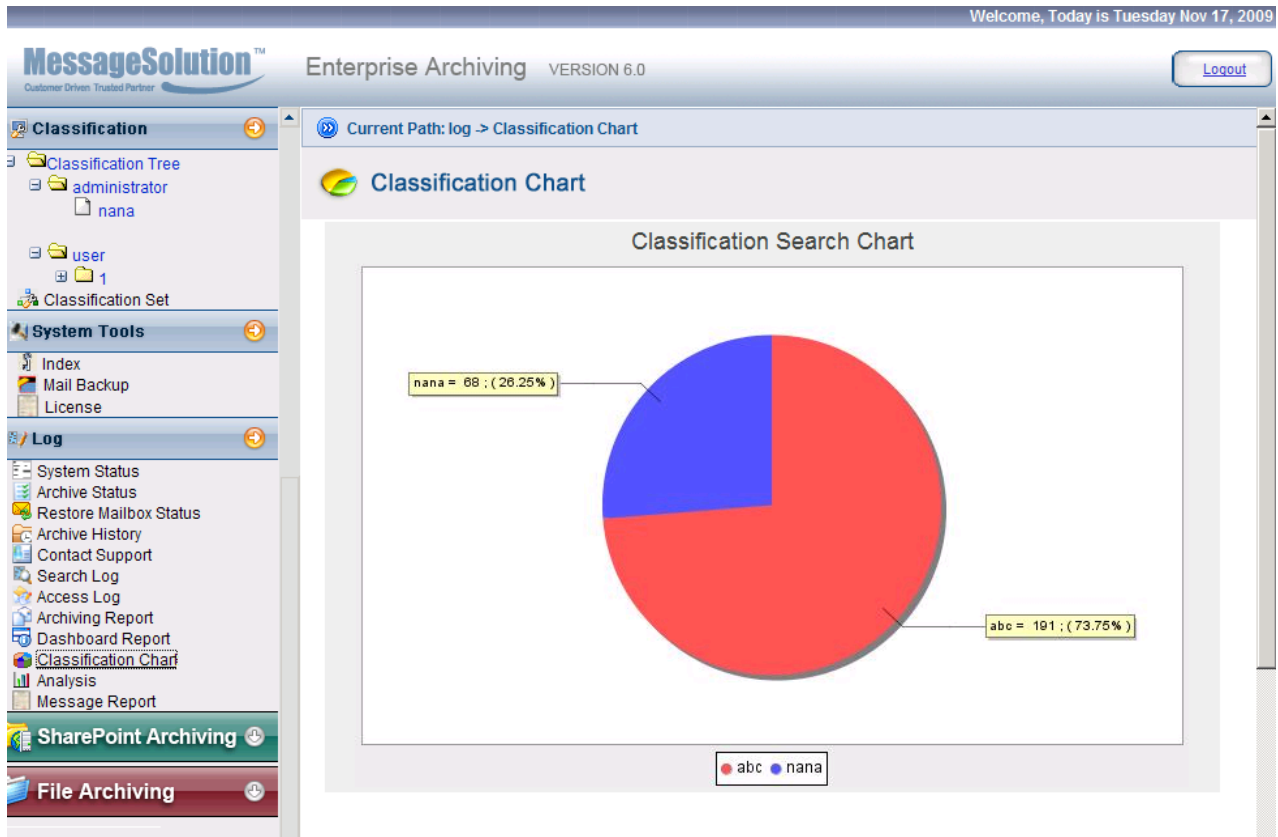
8.10 Analysis

Analysis will allow the review of messages sent or received by a particular user (specified during the initial stage of the analysis page) either against the sender or recipient data and for a specified time range, allowing a convenient resource for viewing the email correspondence patterns between the specified users and all others they have corresponded with in either a text or graphical representation.

8.11 Message Report

The administrator may specify rules or criteria for which messages will be sent with reports compiled from the log files for offline review.

Chapter 9   SharePoint Archiving

Please refer to the ESA 6.0 SharePoint Administrator manual.

Chapter 10   File Archiving

Please refer to EFA 6.0 File Archiving Administrator Manual.

Thank you for choosing MessageSolution to satisfy your enterprise informational archiving, eDiscovery & Migration needs.
In order to provide the best products and service, we encourage our customers to share their experience with our products and the MessageSolution team.

If you have suggestions about helping us improve our product and service performance or would like to propose new features for future product releases, please email us at **techsupport@messagesolution.com**.