



# **Enterprise Email Archiving (EEA) Software as a Service Platform for SME**

## **Company Administration Manual**

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## Chapter 1: Introduction

### 1.1 About MessageSolution Enterprise Email Archive (EEA)

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. Enterprise Email Archive supports a wide variety of messaging environments, 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 a virtually 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 Managed Services Work

MessageSolution EEA is generally installed in the hosting data centers. It uses the following approaches to archive emails.

1. EEA accesses the Exchange Server's database via HTTP/WebDAV protocol. By default, Microsoft Exchange Server 2003 and 2007 enable WebDAV services. It runs on an IIS server through HTTP or HTTPS protocol. Microsoft Exchange's WebDAV Server provides access to its Exchange databases. MessageSolution EEA uses this method to access Exchange Server databases. Using HTTP/HTTPS protocol makes EEA very easy to deploy in corporate environments. EEA can support the industry standard journal mailbox archiving as well as archiving from individual mailboxes. This is because the archive is able to access the Exchange Server databases directly.
2. EEA can retrieve emails from any standard email server via IMAP or Pop protocol. The administrator will configure the email server to copy every email into a designated mailbox. From there, the EEA will periodically retrieve the emails.
3. By leveraging IMAP or Pop 3, the EEA can support virtually all types of email servers. With on-line system deployment, MessageSolution EEA can be installed anywhere.

After the emails are captured, they are compressed and stored in the archive. The EEA also utilizes Single Instance Storage (SIS) to further reduce data storage demands. Then EEA indexes all fields, including subject, content, attachment, message size, date, sender, recipients, and more. The index allows the user to quickly and accurately search through millions of emails using the built-in search engine. Many archiving vendors use SQL servers for indexing. While SQL servers are efficient for indexing structured data, they are not ideal for indexing unstructured data like email. MessageSolution uses a powerful search engine, optimized for unstructured data, to facilitate indexing and searching activities for faster and more accurate search results.

## Chapter 2: Admin Consol & Configuring the Basic Settings

From the “Basic Settings” tab, administrators can configure and manage their user settings for the EEA including: Admin Account, Groups, User Management, Outgoing Email and Style.

### 2.1 Starting the Administrative Web Consol

To view the console start a web browser and go to: **http://<EEA’s IP address>:port/**  
Access credentials will be provided by the Service Provider.

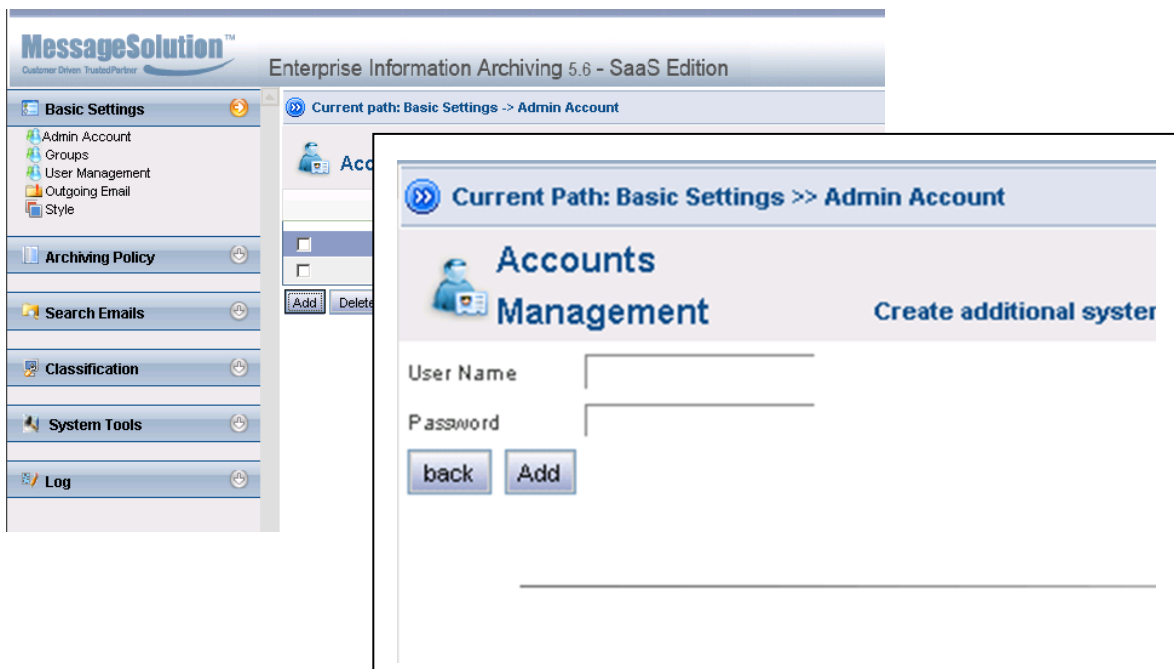
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Note: The default port number set during installation is 80.

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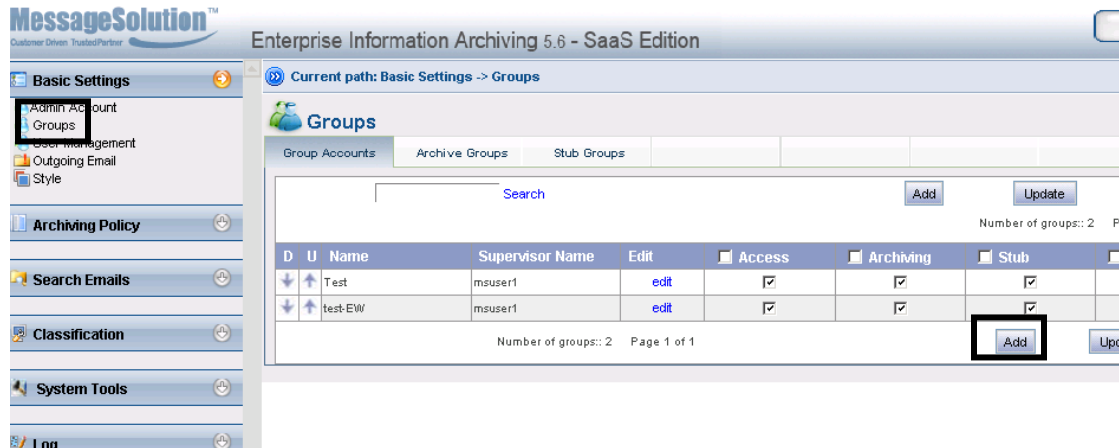
### 2.2 Admin Account

Create additional administrative accounts from the “Admin Account” tab. Click “Add” to create new admin. Account. Click “Edit” to modify existing accounts

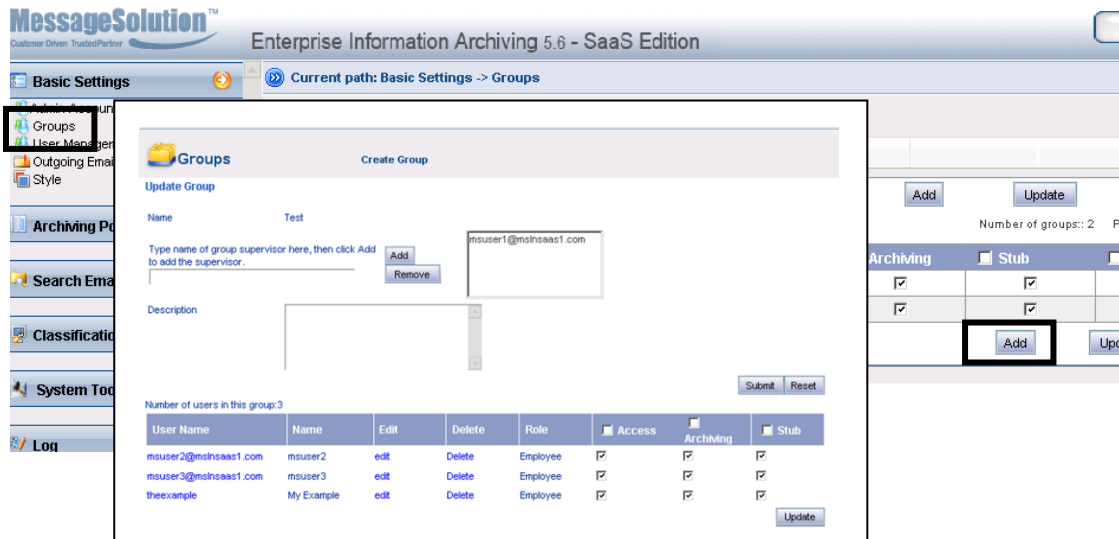


## 2.3 Groups

Use the “Groups” tab to manage multiple user-groups for different stubbing and archiving policies. These policies can be categorized with 3 tabs: Group Accounts, which lists all groups, Archiving Groups & Stub Groups. While administrators can be manually created, Groups are typically pulled from security and distribution groups for the Active Directory or other directory services.



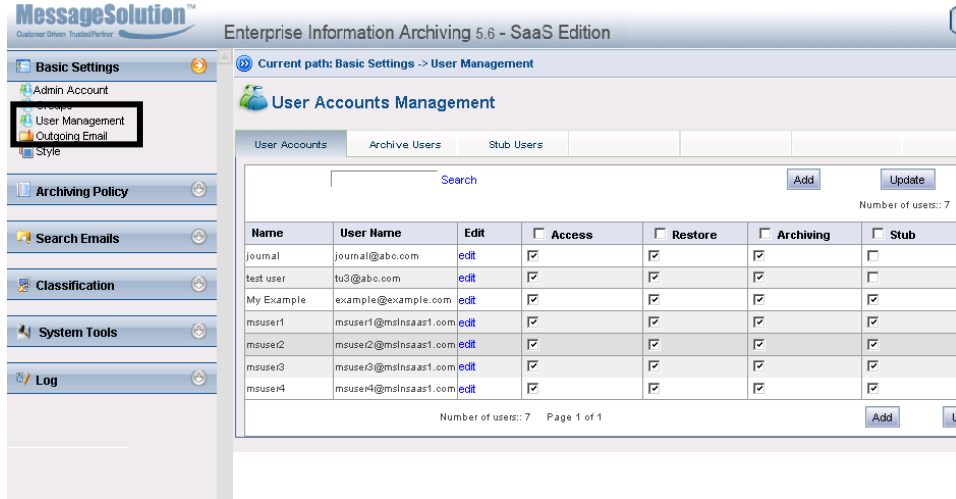
1. Use the “Add” button to create a new group. Define the group perimeters and policies.



2. Use “Edit” to modify a group’s profile.
3. Check or uncheck boxes to enable user access, archiving or stubbing. Check delete box to delete that group. Click “Update” to apply changes.
4. Prioritize groups by clicking either the up or down arrows. A group’s positioning on the list represents the priority of the Group Policy. Click “Update” to apply changes.

## 2.4 User Management

Here system administrators can manage and enable different archive functionality for each user. Administrators can opt to view only users selected for archiving or stubbing by clicking on the “Archive Users” or “Stub Users” tabs above the list. As with User-Group policies, Individual users can be added manually, but are most commonly pulled from a directory service.



1. Click “Add” to manually create a new user (Not commonly used)  
Enter the User credentials (including multiple mailboxes) and use the boxes at the bottom to configure archive access and permissions.

Check or uncheck bottom boxes for the following archive options:

- **Archiving:** Whether their mailbox will be actively archived.
- **Use System Policy:** Apply Global Policy
- **Access:** whether or not they can access the archive from the web consol.
- **Restore:** the ability to restore messages from the web consol.
- **View All Users' Email:** This will enable a super-user function with the ability to access all emails in the archive as an administrator.

2. Click “Edit” to change a current user’s profile.

(User Management Continued)

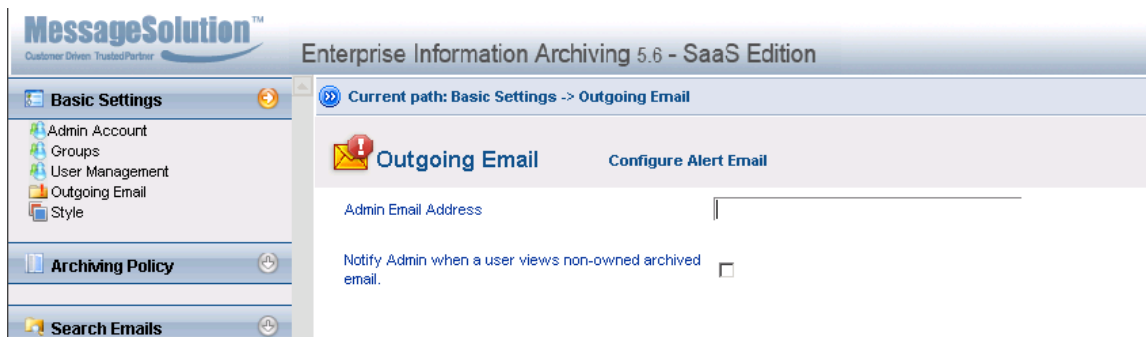
3. Check or uncheck boxes to enable access, restoration, archiving and stubbing for each user. Click "Update" to apply any changes.
4. Once a user has been deselected for archiving, that license is can then be reapplied to another user.

**Note :** User's are stored on the list in alphabetical order by login name. It should be noted however, that if the amount of users selected for archiving exceeds the license limit, licenses are distributed from the top of the list down. This means that if there are 26 users selected for archiving but only 25 licenses, User 'Z' will be automatically deselected for archiving.

To order more product licenses, please contact your MessageSolution Representative.

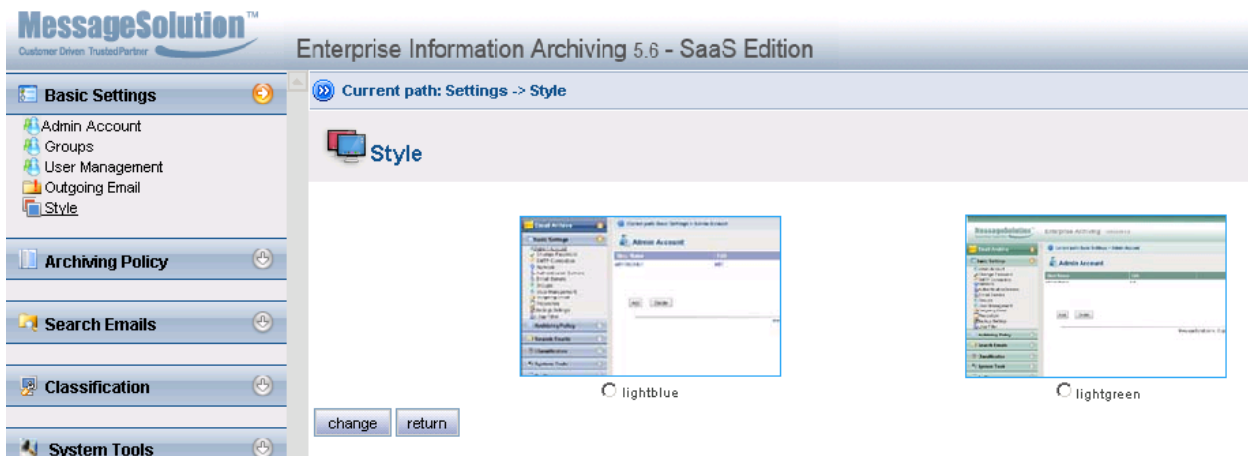
## 2.5 Outgoing Mail

This menu configures the archiving server to a mail transfer agent (MTA) for sending messages out. This configuration is tied into the forwarding messages and sending alters/reports.



## 2.6 Style

From the "Style" menu, administrators can select the visual style for their user-interface that will be presented to the end-users.





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## Chapter 3: Configuring Archiving Policy

From the “Archiving Policy” menu, administrators can configure and manage archiving functionality, stubbing, retention and more.

### 3.1 Real-Time Archiving

Real-Time archiving is highly effective for compliance archiving. Many organizations have federal or industry regulations that require them to capture all email communications, or to save all email communications. Real-Time archiving can be used in connection with Stubbing and Retention Policies for managing each individual mailbox on the email server. Emails archived by real-time archiving process are also immediately indexed for instant searching.

Upon entering or leaving the inbox, every single piece of incoming, outgoing or internal mail is immediately copied to the archive. EEA utilizes email server’s journaling capability for real-time archiving. For other types of email servers, refer to the manual to setup a journal mailbox.

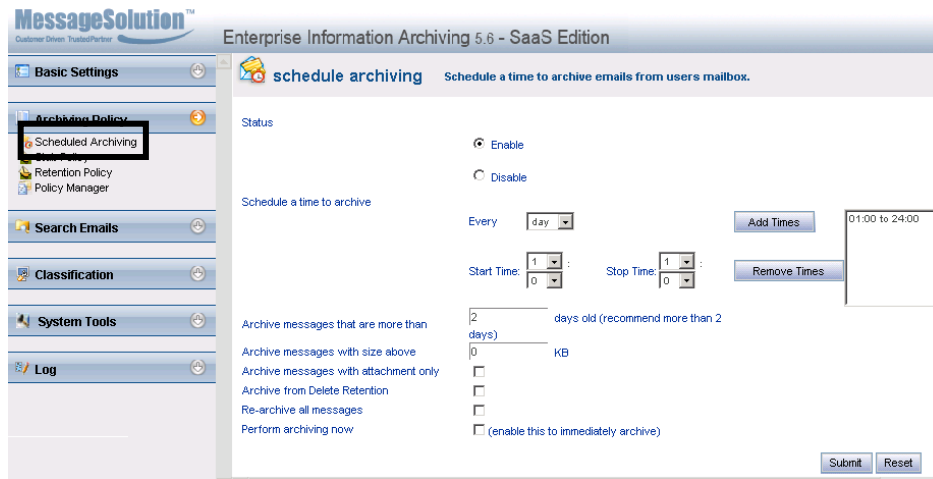
To enable real time archiving, please contact your MessageSolution Representative. In preparation, an administrative account on the email server will be needed. After the server has been authenticated, real-time archiving will be functional.

### 3.2 Scheduled Archiving

Scheduled Archiving is suitable for archiving existing historical emails currently on the Exchange or Domino servers. 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. The Domain controller Server will need to be authenticated in order to retrieve user and folders information. Typically, corporate users create personal folders in Outlook to categorize emails for easy management and organization. However, without the Outlook folder information, every single emails will be archived are in one, flat view. This will make it extremely difficult to manage. For more information, please contact you MessageSolution Representative.

Scheduled Archiving also gives the user some time to clean up the mailbox by deleting spam, viruses or irrelevant emails before the archiving service starts storing data. In this way, the EEA will only archive the important emails.

(Scheduled Archiving Continued)



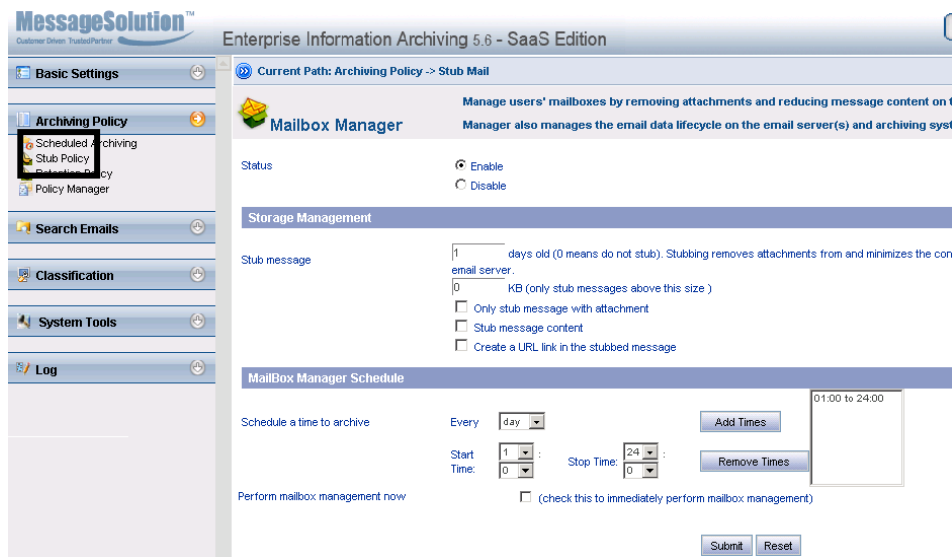
1. Use the “Scheduled Archiving” tab to configure scheduled archiving settings including time parameters
2. Disable will stop EEA archive service.
3. Schedule the archiving. If you select every day, the “Day of week” field will be ignored. The recommended practice is to schedule a daily archiving during 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.

### 3.3 Stubbing

MessageSolution EEA's Stubbing feature provides users with flexible settings to help manage and reduce data storage on the email. The major benefits of stubbing include offloading email server load to the archiving system, eliminating user quota limitation, and increase overall IT administrator and employees' productivity. Stubbing typically takes messages on the email server with large attachments and moves the attachment to the archive leaving a shortcut in its place. This drastically reduces the data volume stored on the email server.

Once administrators create a blanket stubbing policy, individual user or group stubbing policies can be configured under "Policy Manager".

Manage Stubbing policies from the "Stub Mail" tab.



1. Click "Enable" or "Disable" to activate or deactivate stubbing.
2. **Storage Management-** Define parameters for the stubbing policy. Criteria include email age, minimum size, the option to stub for either attachments or email content, and the inclusion of a URL link in the stubbed message.
3. **Mailbox Manager Schedule** – Configure time frame and frequency for active stubbing. Stubbing can be performed weekly or daily at specified times.
4. Select the unchecked box (for mailbox management) to perform immediate stubbing.

To preserve server resources, it's best if stubbing is done during low-traffic or off hours. It is also the best practice to stub only large, less-commonly accessed message attachments as stubbed content must be re-downloaded to the email server for viewing. To view or access stubbed attachments or content from the email server, MessageSolution offers the Outlook/Lotus Notes/GroupWise client plug-in. For more information please contact your MessageSolution Representative.

### 3.4 Retention Policy

Retention Policies can be set and managed in accordance with Corporate Policies. After creating a blanket retention policy, multiple user or group policies can be added. To manage or create individual user or group policies, click “Policy Manger”.

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Enterprise Information Archiving 5.6 - SaaS Edition

Current Path: Archiving Policy -> Retention Mail

Manage users' mailboxes by removing attachments and reducing message size on the email server(s). Mailbox Manager also manages the email data lifecycle on the email system.

**Mailbox Manager**

Status:  Enable  Disable

**Retention Policy**

Remove items from email server: 1 days old (0 means never remove from email server. Warning: this will remove items on the live email server, use this operation with caution)

Remove messages from archive: 2555 days old (0 means never remove from archive)

**MailBox Manager Schedule**

Schedule a time to archive: Every: day

Start Time: 1:00 : Stop Time: 24:00

Perform mailbox management now:  (check this to immediately perform mailbox management)

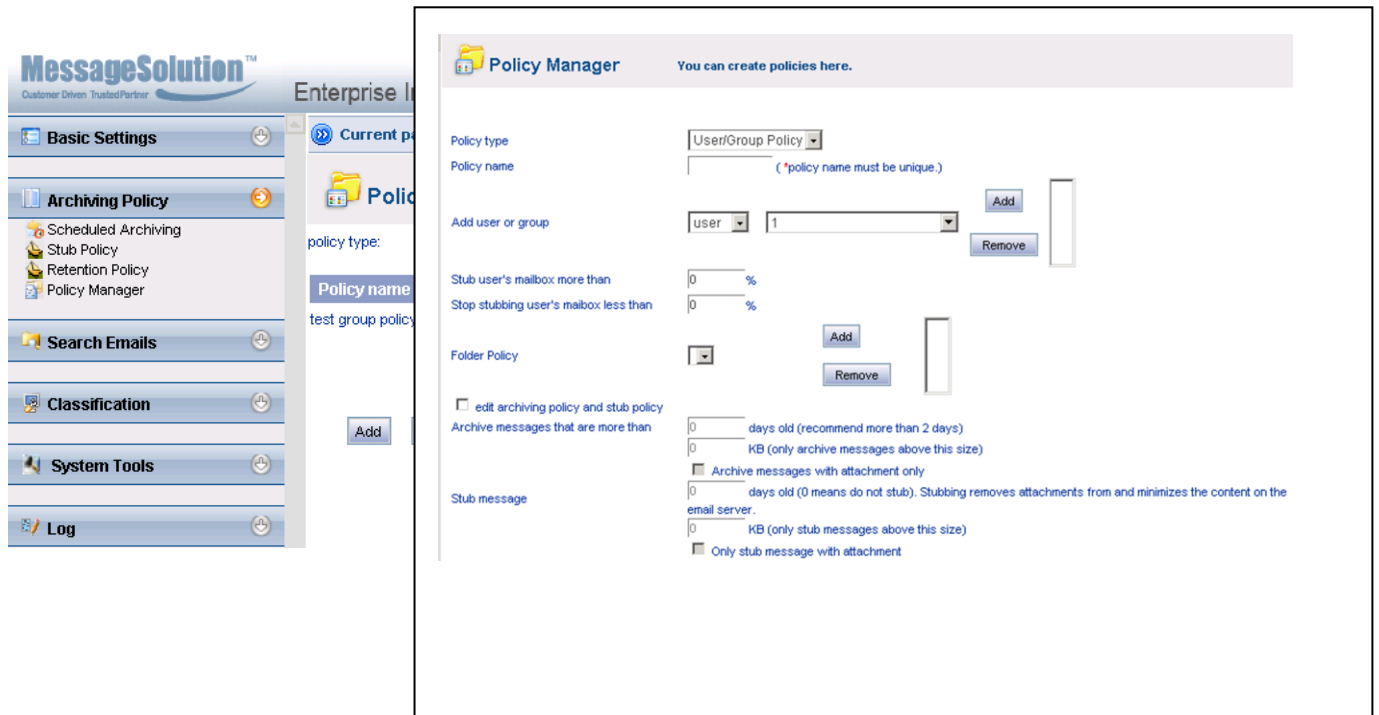
Buttons: Add Times, Remove Times, Submit, Reset

1. **Status-** click the option to enable or disable the blanket retention policy.
2. **Retention Policy-** designate the length of time (in days) that messages will sit on the email server before being archived. Enter 0 to keep messages on the email server indefinitely. Also define how many days messages will be kept in the archive. Enter 0 to keep messages in the archive indefinitely.
3. **Mailbox Manager Schedule-** designate a weekly or daily time frame to purge the archives and delete message with an expired policy.
4. Check the box to immediately purge the archive.
5. Click “Submit”

### 3.5 Policy Manager

Use the “Policy Manager” to create or manage multiple user or group policies. Administrators can search for desired policy or they can sort the results by policy type from the drop-down menu on the left. Since multiple policies can be simultaneously applied to a user or group, EEA will defer to the most conservative of the policies.

1. Click “Edit” to modify an existing policy.
2. To delete a policy, check the corresponding box on the left and click “Delete”.
3. Click “Add” to create a new policy.



4. Policy Type: Define policy as either a User/Group, Server or Folder Policy from the pull-down menu
5. Policy Name: Assign policy a unique name
6. Add User or Group: Select multiple users or groups for whom to apply the policy
7. Stub User’s Mailbox More Than:
8. Stub User’s Mailbox Less Than
9. Folder Policy:
10. Select the Boxes on the left to implement stubbing or archiving policies unique to that group. Enter new Stubbing or Archiving policy parameters.
11. Click “Save”

## Chapter 4: 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.

Once the specific emails have been located, user's will have the option of

### 4.1 Search Archives

Advanced search features provide a comprehensive interface to allow users to define their search criteria granularly. Users can search by any field in the email including: subject, content and attachment, sender, recipients, message size, attachment file extension, and date.

The screenshot shows the MessageSolution Enterprise Information Archiving 5.6 - SaaS Edition search interface. The sidebar on the left contains navigation options: Basic Settings, Archiving Policy, Search mails (highlighted with a red box), Classification, System Tools, and Log. The main search area includes the following fields and options:

- Subject: contains all of [text input] Not
- Content: contains all of [text input] Not
- Attachment: contains all of [text input]
- Sender: is [text input]
- Recipient: is [text input]
- All Other Fields: contains all of [text input]
- Message Size: From: [text input] KB To: [text input] KB
- File Extension: [text input]
- Attachment Filename: [text input]
- Messages for: Past ten years [dropdown]
- Start Date: June [dropdown] - 9 [dropdown] - 2002 [dropdown]
- End Date: June [dropdown] - 9 [dropdown] - 2012 [dropdown]
- Repository: [text input]
- Tags: [text input]
- Messages Per Page: 50 [dropdown]

1. 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.
2. 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.

*(Search Archive Continued)*

3. 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.
4. 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.
5. You can search by subject, content, attachment, sender, recipients by specifying in "All Other Fields" textbox.
6. 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.
7. 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.
8. "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.
9. You can search in any specific repository if you have multiple repositories available. By default, it searches through all repositories.
10. "E-mail Type" allows you to include searching for Public Folders emails. Default search does not include Public Folders items.
11. "Folders" allow you to search by each folders emails. Such as searching by inbox.
12. 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.
13. Default search result shows 50 messages per page. You can select a different number. The maximum is 1,000 per page.
14. "Concept Search". Choose this option to let EEA search engine find related information for the meaning of the search condition.
15. The returned list messages can be sorted by click on the column header: Sender, Recipient, Subject, Date, or Size.

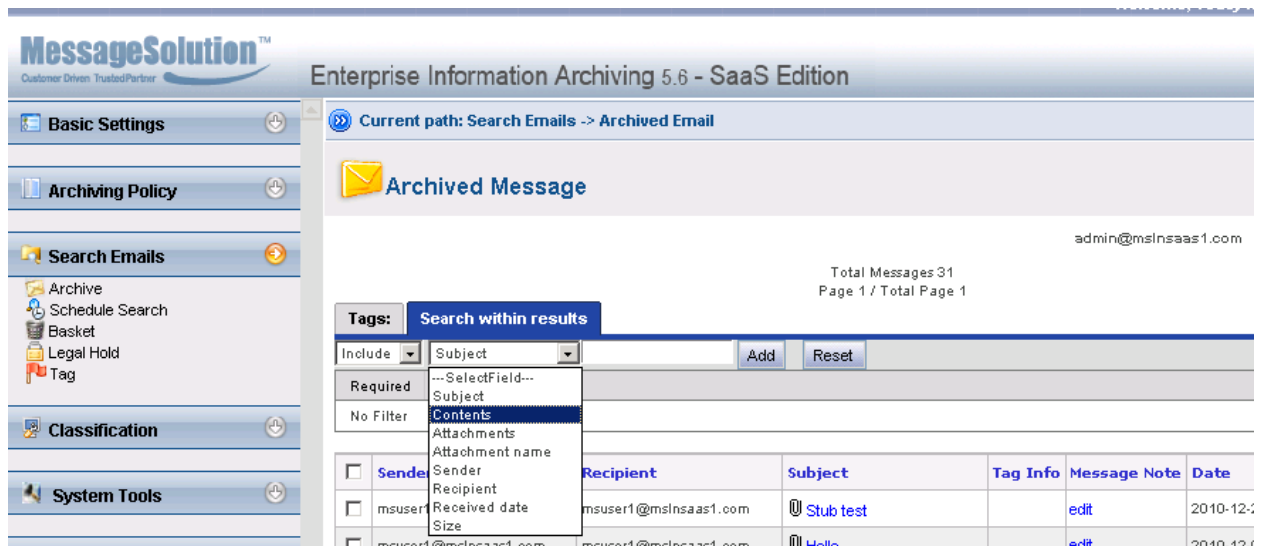
(Search Archive Continued)

At the bottom of the search results, selected messages can be deleted, downloaded in EML format to a local computer, saved to a designated basket, placed on specified legal hold, tagged. The “Print” button will download the message as a PDF for easy printing. However, email attachments cannot be printed.



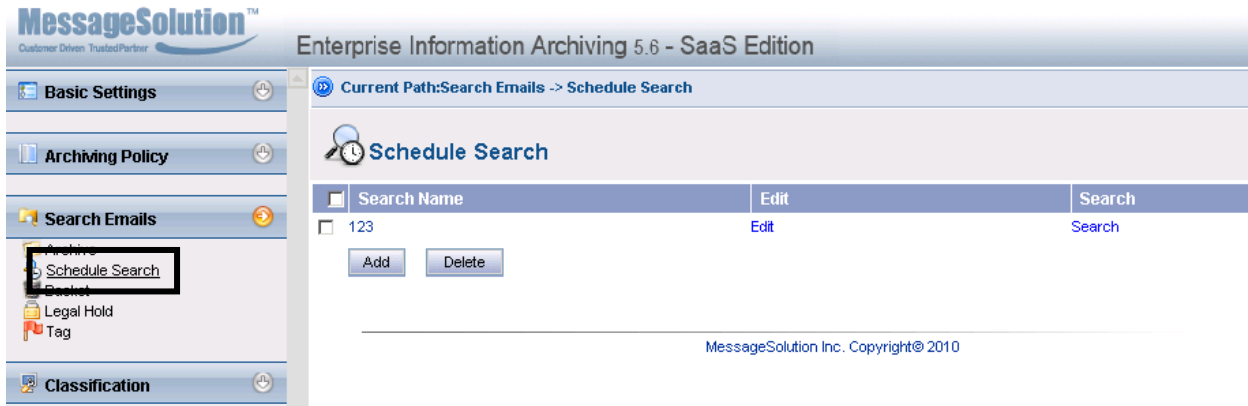
## 4.2 Search Within Search Results

Users can search within the search results from the tool bar on top. Multiple additional search criteria can be added. Click “Add” to implement additional criteria.



### 4.3 Scheduled Search

From the Scheduled Search menu, Administrators can schedule searches to run at designated times. The search criteria are also saved and by pressing the “Search” button, can be run instantly.



1. Check corresponding box on the left and click “Delete” to delete a saved search
2. Click “Add” to create a new Scheduled Search and fill in search criteria. Specify the search time by days, hours or minutes and designate an email address where the search results will be sent.

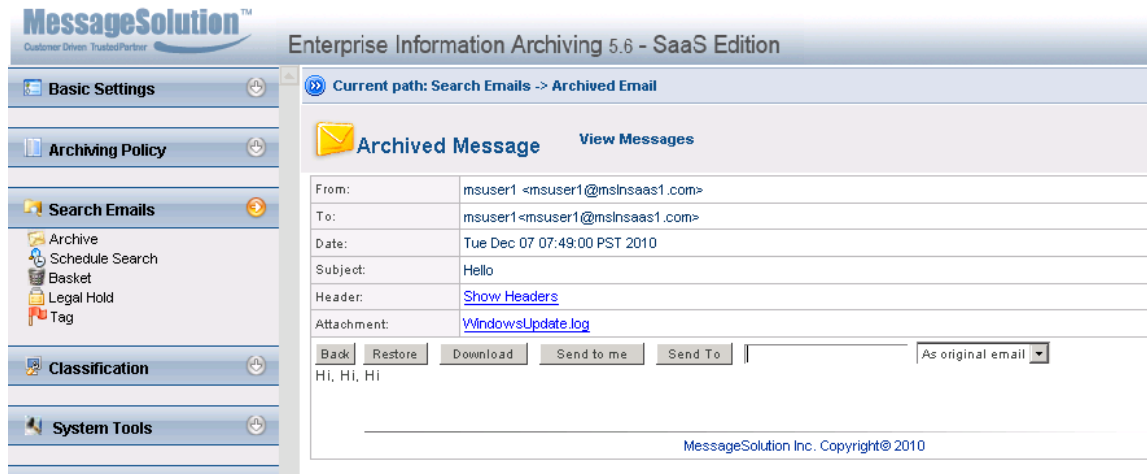
The 'Schedule Search' form is titled 'Schedule Search' with the subtitle 'schedule a time to search and email the result'. It contains the following fields:

- Schedule Search Name:  (\* Schedule Search name must be unique )
- Subject: contains all of  Not
- Content: contains all of  Not
- Attachment: contains all of
- Sender: is
- Recipient: is
- All Other Fields: contains all of
- Message Size From:  KB To  KB
- File Extension:
- Attachment Filename:
- Schedule Search Time:  Days  Hours  Minutes
- Mail Send To:

A 'Save' button is located at the bottom right of the form.

## 4.4 Accessing Emails

Once a selected email is opened, Users have several options for accessing the email.

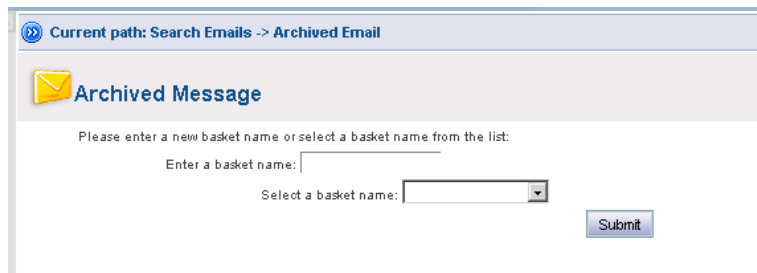


1. Click “Restore” to restore the email to its original location on the email server. The message will be restored to the mail server with original metadata.
2. Click “Download” to download the message only a local computer in EML format. The message will also contain original metadata. To download emails in PST format please contact your MessageSolution Representative.
3. Click “Send to Me” to send selected email to your mailbox. It will be sent from the System Administrator’s inbox with today’s time stamp.
4. To email to a separate user, enter the receiving email address, designate if the message will be sent as an attachment or as an email, and click “Send To”. It will also be sent from the System Administrator’s inbox with today’s time stamp.

## 4.5 Basket

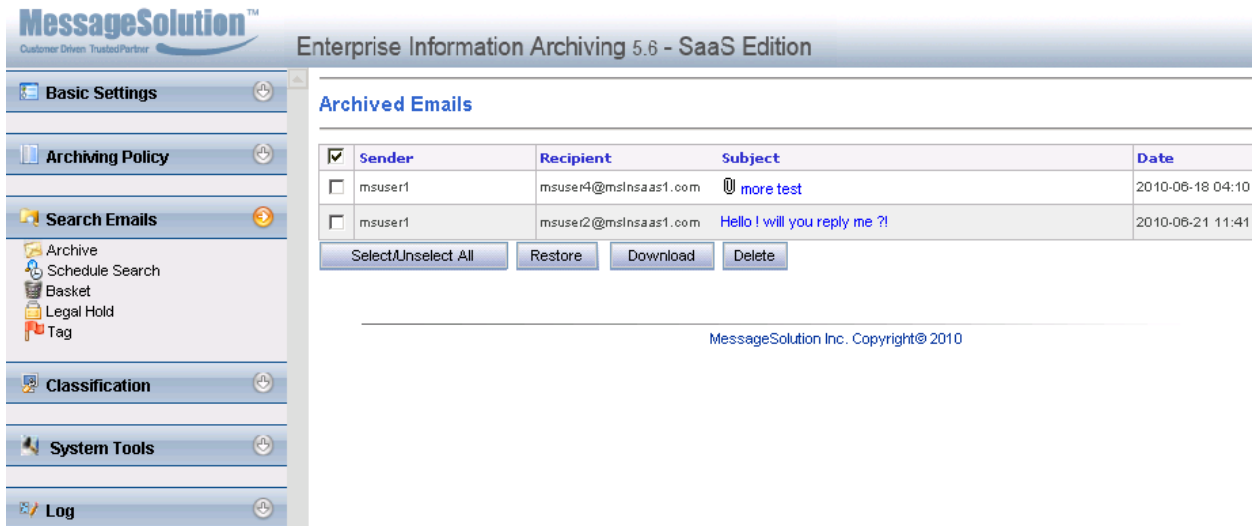
Users can select emails from the search result and save them in a unique “Basket” created by the user. This allows users to group emails together for easy viewing or batch downloading. Selected emails will be stored in one location under the designated Basket name and from there they can be viewed, downloaded, sent to a valid email address or removed from the Basket.

1. To create a new basket, select emails from the search results. Click “Save to Basket” From here they will have the option to save emails to an existing basket or to enter a new basket name.



(Basket Continued)

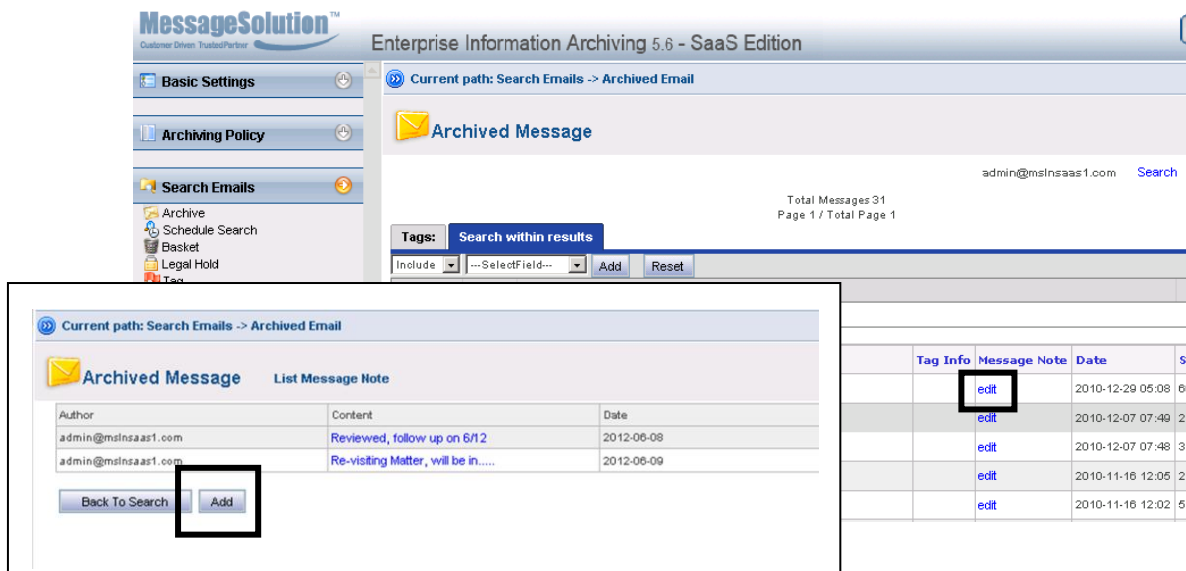
- From the “Basket menu, users can search through each basket. Click “View” to open basket and search basket content.



From this view, Users restore, download in EML format or delete multiple emails at once.

## 4.6 Annotation


The annotation feature allows user to make notes on messages they have viewed without compromising the integrity for the original message. From the list of search results, click “Edit” under “Message Notes” to add a new note and read other notes. From here, click a Content link to review note or click “Add” to create a new one.



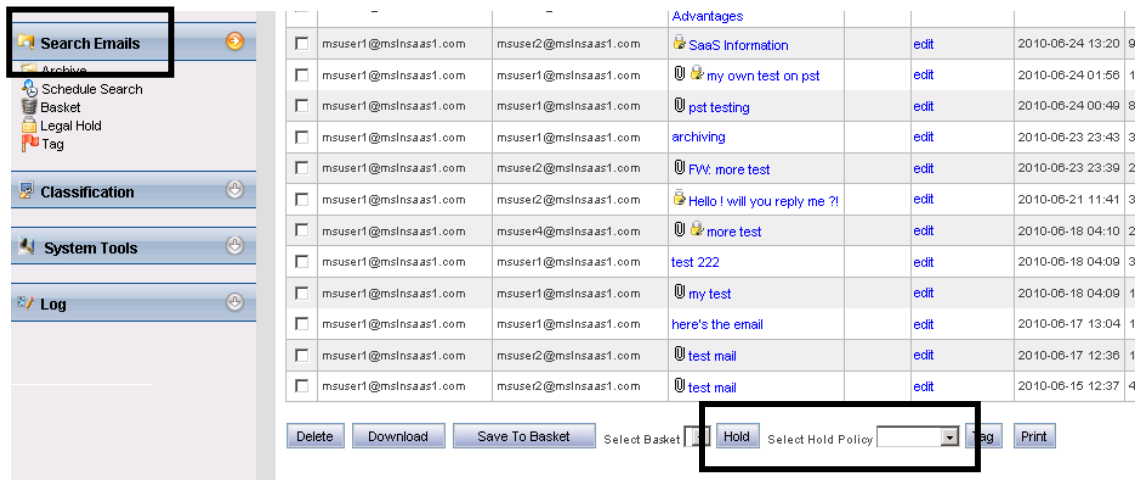
## 4.7 Legal Holds

In cases of eDiscovery or other policy needs, administrators can implement a Legal Hold on selected users, user-groups or individual messages. Legal Holds are a temporary extension of the retention period. Legal Hold Policies can be defined by specified time period after which the policy will expire, or messages can be held “Forever.” Emails affected by a “Forever” policy will be kept until manually deleted by the system administrator. All held emails will also be release once the specified policy has been deleted. This can also be done by the system administrator.

Legal Hold notifications automatically inform administrators, custodians and other relevant parties of new or escalated legal holds. While the legal hold is visible to the administrator, end-users are given no other indication that any file(s) are being held.

In the search results, emails held under a legal hold are denoted to administrators with a . Click the lock icon to view the legal hold policy information or to immediately release the email.

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 Legal Hold Policy to be applied to the selected files from the drop-down menu. Click “Hold” to apply.



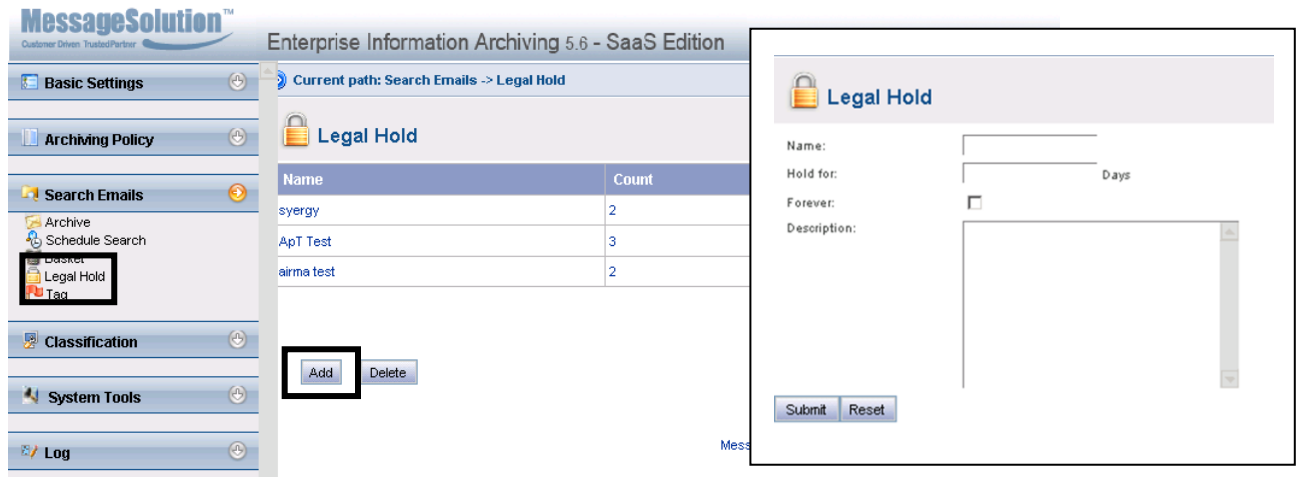
The screenshot shows the MessageSolution interface. On the left is a sidebar with navigation options: Search Emails (highlighted with a red box), Archive, Schedule Search, Basket, Legal Hold, and Tag. Below this are sections for Classification, System Tools, and Log. The main area displays a table of search results. The table has columns for checkboxes, sender/receiver email addresses, subject lines, an 'edit' link, and a timestamp. The subject lines include 'Advantages', 'SaaS Information', 'my own test on pst', 'pst testing', 'archiving', 'FVV: more test', 'Hello ! will you reply me ?!', 'more test', 'test 222', 'my test', 'here's the email', 'test mail', and 'test mail'. At the bottom of the table, there are buttons for 'Delete', 'Download', 'Save To Basket', 'Select Basket', 'Hold' (highlighted with a red box), 'Select Hold Policy' (a dropdown menu), 'Tag', and 'Print'.

<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser2@mslnsaas1.com	Advantages		
<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser1@mslnsaas1.com	SaaS Information	edit	2010-06-24 13:20 9
<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser1@mslnsaas1.com	my own test on pst	edit	2010-06-24 01:56 1
<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser1@mslnsaas1.com	pst testing	edit	2010-06-24 00:49 8
<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser1@mslnsaas1.com	archiving	edit	2010-06-23 23:43 3
<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser2@mslnsaas1.com	FVV: more test	edit	2010-06-23 23:39 2
<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser2@mslnsaas1.com	Hello ! will you reply me ?!	edit	2010-06-21 11:41 3
<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser4@mslnsaas1.com	more test	edit	2010-06-18 04:10 2
<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser1@mslnsaas1.com	test 222	edit	2010-06-18 04:09 3
<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser1@mslnsaas1.com	my test	edit	2010-06-18 04:09 1
<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser1@mslnsaas1.com	here's the email	edit	2010-06-17 13:04 1
<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser2@mslnsaas1.com	test mail	edit	2010-06-17 12:36 1
<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser2@mslnsaas1.com	test mail	edit	2010-06-16 12:37 4

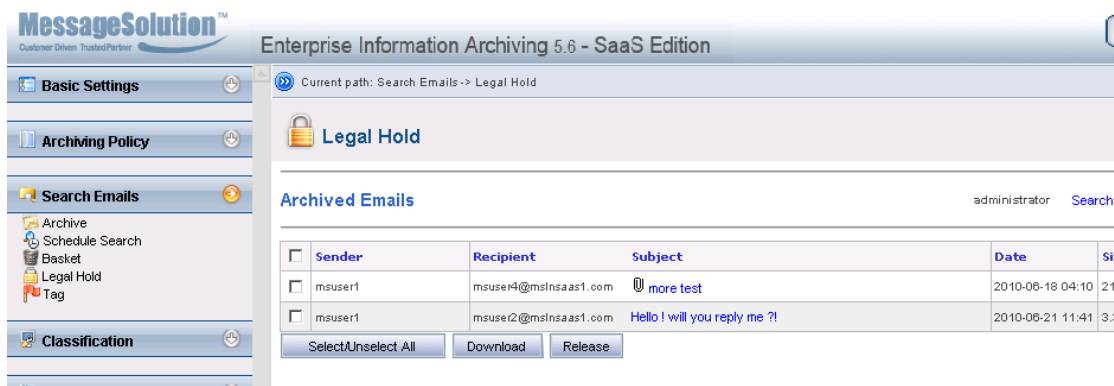
3. If there are no Holds currently on the system or if you would like to create a new Legal Hold Policy, simply select the file(s) to be placed on this hold and click directly on the “Hold” button.
4. Fill in the name, how long the files should be held beyond the current retention policy set in the EEA, or choose “Forever” by clicking in the appropriate box, then fill in a description for this hold.
5. Click “Submit” to save the changes.

Use the “Legal Hold” Menu to manage and search through all active Legal Hold policies. “Count” represents the number of emails held. “Reserve Days” denotes the active time frame (in days) of the policy.

*(Legal Holds Continued)*



1. Click “Add” to create a new Legal Hold Policy. Enter a Name and a Policy Description. Enter either an active time frame for the hold OR check the box “Forever” for an indefinite hold.
2. To delete a hold, select the corresponding box (far left) of the policy you wish to delete. Click “Delete”
3. Administrators can manage individual messages from the policy by clicking the “View” button. From here administrators have the option of releasing selected emails from the legal hold or downloading them to the local computer in EML format.




Note: In many legal eDiscovery cases, legal counsel will need a quick and efficient way to export all emails held under a certain policy. PST is usually the preferred format. For bulk PST exports, please contact your MessageSolution Representative.

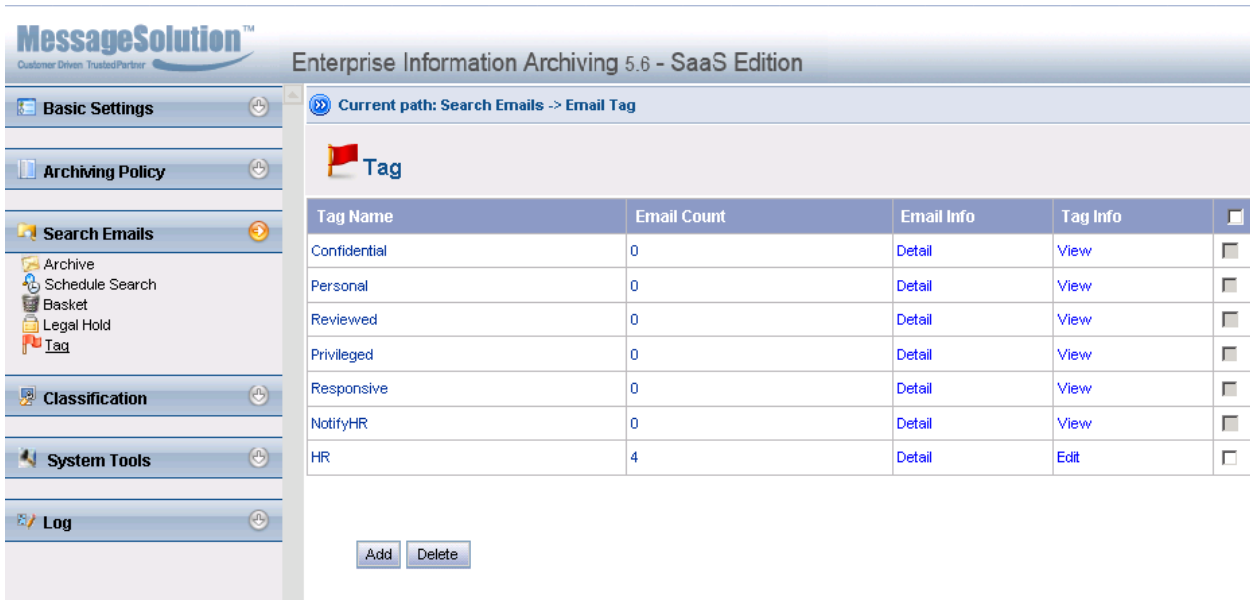
4. Administrators can also edit exiting policies with the “Edit” button.

## 4.8 Tagging

The EEA provides convenient options for the administrator or review teams 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, NotifyHR tags or create a new tag and apply it to any selected email(s).

From the search results, the  icon denotes tagged messages. The corresponding number denotes the number of different tags given to a specific message.



MessageSolution<sup>TM</sup> Enterprise Information Archiving 5.6 - SaaS Edition

Current path: Search Emails -> Email Tag

**Tag**

Tag Name	Email Count	Email Info	Tag Info	<input type="checkbox"/>
Confidential	0	<a href="#">Detail</a>	<a href="#">View</a>	<input type="checkbox"/>
Personal	0	<a href="#">Detail</a>	<a href="#">View</a>	<input type="checkbox"/>
Reviewed	0	<a href="#">Detail</a>	<a href="#">View</a>	<input type="checkbox"/>
Privileged	0	<a href="#">Detail</a>	<a href="#">View</a>	<input type="checkbox"/>
Responsive	0	<a href="#">Detail</a>	<a href="#">View</a>	<input type="checkbox"/>
NotifyHR	0	<a href="#">Detail</a>	<a href="#">View</a>	<input type="checkbox"/>
HR	4	<a href="#">Detail</a>	<a href="#">Edit</a>	<input type="checkbox"/>

[Add](#) [Delete](#)

1. Click “View” to see the tag description.
2. Click “Add” to create a new Tag. For customized tags, users will have the option to “Edit” the tag description instead of simply viewing it.
3. Click “Detail” to list all emails with a specified tag.
4. To delete a tag, select the corresponding box and click “Delete”

## Chapter 5: Classification

The Classification feature provides an automatic template-search that users can use to organize and manage their personal archives. Folders and subfolders can be created with designated search criteria. When adding a classification, users will essentially create a scheduled search where emails matching those criteria will be grouped together in a specified folder.

### 5.1 Classification Tree

Users can use the “Classification Tree” under the Classification menu to interactively organize and maintain emails in their archive. Users can use the toolbar to search Classifications.

The screenshot displays the MessageSolution web interface. On the left is a navigation sidebar with options: Basic Settings, Archiving Policy, Search Emails, Classification (selected), and System Tools. The main content area shows the 'Add Classification' page. At the top, it indicates the current path: 'Classification -> Email Classification'. Below this, there are controls for 'classification type' (set to 'all nodes'), 'record per page' (set to '10'), and a 'search name' field. A table lists existing classifications with columns for 'Classification/Node Name', 'Parent Node Name', 'Node property', and 'Add by User'. The table contains four rows: 'cv4', 'longer retention', 'administrator', and 'user'. Each row has a checkbox and an 'Edit' link. Below the table are three buttons: 'Add Classification', 'Add Node', and 'Delete'.

<input type="checkbox"/>	Classification/Node Name	Parent Node Name	Node property	Add by User	Ed
<input type="checkbox"/>	cv4	Classification Tree	Classification	admin@mslnsaas1.com	Edit
<input type="checkbox"/>	longer retention	Classification Tree	Classification	admin@mslnsaas1.com	Edit
<input type="checkbox"/>	administrator	Classification Tree	Tree Node	administrator	Edit
<input type="checkbox"/>	user	Classification Tree	Tree Node	administrator	Edit

1. Click “Edit” to modify a Classification
2. To delete a classification, select the corresponding box and click “delete”

(Classification Tree Continued)

- Click “Add” to create a new classification

- Enter the classification criteria and save.

## 5.2 Classification Set

The System Administrator can create Company-wide classifications and can authorize certain users to view them. Use the “Classification Set” menu to manage user viewing permissions for the Classifications.

---

## Chapter 6: System Tools

### 6.1 Index

For the purposes of searching, all email metadata and other criteria are indexed upon entering the archive. Every once in a while, the search engine index will need to be re-indexed as a result of a system crash or unexpected errors. When searching emails, if you notice some missing data appears to be missing, re-indexing can improve search functionality.

## Chapter 7: Log

For compliance management and user governance, EEA provides logging and audits trail for administrators to monitor the archiving system and user activities.

### 6.2 Archiving History

The Archive History page will contain user-specific information on the start and end time of each archive process performed for each listed user. Click “Details” for specific folder information and archived email count.

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Current path: Log -> Archive History

Archive Status

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User name	Start time	End time	Operation type	detail
Administrator_mslnsaas1	Sat Jun 09 01:00:47 PDT 2012	Sat Jun 09 01:00:52 PDT 2012	Archive	<a href="#">detail</a>
Administrator_mslnsaas1	Fri Jun 08 01:00:43 PDT 2012	Fri Jun 08 01:00:49 PDT 2012	Archive	<a href="#">detail</a>
Administrator_mslnsaas1	Thu Jun 07 01:00:26 PDT 2012	Thu Jun 07 01:00:31 PDT 2012	Archive	<a href="#">detail</a>
Administrator_mslnsaas1	Wed Jun 06 01:00:08 PDT 2012	Wed Jun 06 01:00:13 PDT 2012	Archive	<a href="#">detail</a>
Administrator_mslnsaas1	Tue Jun 05 01:00:50 PDT 2012	Tue Jun 05 01:00:55 PDT 2012	Archive	<a href="#">detail</a>
Administrator_mslnsaas1	Mon Jun 04 01:00:29 PDT 2012	Mon Jun 04 01:00:34 PDT 2012	Archive	<a href="#">detail</a>
Administrator_mslnsaas1	Sun Jun 03 01:01:09 PDT 2012	Sun Jun 03 01:01:14 PDT 2012	Archive	<a href="#">detail</a>
Administrator_mslnsaas1	Sat Jun 02 01:00:47 PDT 2012	Sat Jun 02 01:00:53 PDT 2012	Archive	<a href="#">detail</a>
Administrator_mslnsaas1	Fri Jun 01 01:00:26 PDT 2012	Fri Jun 01 01:00:32 PDT 2012	Archive	<a href="#">detail</a>
Administrator_mslnsaas1	Thu May 31 01:03:22 PDT 2012	Thu May 31 01:07:01 PDT 2012	Archive	<a href="#">detail</a>
Administrator_mslnsaas1	Wed May 30 01:03:51 PDT 2012	Wed May 30 01:07:29 PDT 2012	Archive	<a href="#">detail</a>
Administrator_mslnsaas1	Tue May 29 01:03:12 PDT 2012	Tue May 29 01:06:50 PDT 2012	Archive	<a href="#">detail</a>
Administrator_mslnsaas1	Mon May 28 01:01:06 PDT 2012	Mon May 28 01:01:12 PDT 2012	Archive	<a href="#">detail</a>
Administrator_mslnsaas1	Sun May 27 01:00:46 PDT 2012	Sun May 27 01:00:51 PDT 2012	Archive	<a href="#">detail</a>
Administrator_mslnsaas1	Sat May 26 01:00:28 PDT 2012	Sat May 26 01:00:34 PDT 2012	Archive	<a href="#">detail</a>
Administrator_mslnsaas1	Fri May 25 01:01:07 PDT 2012	Fri May 25 01:01:13 PDT 2012	Archive	<a href="#">detail</a>
Administrator_mslnsaas1	Thu May 24 01:00:47 PDT 2012	Thu May 24 01:00:52 PDT 2012	Archive	<a href="#">detail</a>
Administrator_mslnsaas1	Wed May 23 01:00:26 PDT 2012	Wed May 23 01:00:31 PDT 2012	Archive	<a href="#">detail</a>

## 6.3 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.

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Current path: Archive Status

Archive Status

ScheduleArchiving | MailboxManage

Company	Archiving Message Count	Start Date	End Date
<input type="checkbox"/> mslnsaas1	0	Sat Jun 09 01:00:47 PDT 2012	Sat Jun 09 01:00:53 PDT 2012

Refresh

## 6.4 Search Log

Most compliance regulations require companies to audit all activities conducted on the archived data. EEA provides an inalterable log of all search activities for archived emails. You can view all search activities. The search log shows who have conducted the search, whose emails were being searched, search criteria such as Subject, Content, Sender, Recipients, etc.

1. Use the tool bar at the top to search through the log entries by user name, content and attachments or date.
2. User can click on “Frequent Search” button to view the top 10 searches.
3. User can use the Search Again link to launch that same search. This will save user’s time to enter the same search criteria

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Current path: log -> Search Log

Search Log

User Name  Search Frequent Search

Company Name	User Name	Searched User	Search	Subject	Content & Attachment	Sender	Recipient	Other type	F E
mslnsaas1	msuser1@mslnsaas1.com	msuser1@mslnsaas1.com	<a href="#">search again</a>	contains all of :	contains all of :	is :	is :	contains all of :	
mslnsaas1	msuser1@mslnsaas1.com	msuser1@mslnsaas1.com	<a href="#">search again</a>	contains all of :	contains all of :	is :	is :	contains all of :	
mslnsaas1	msuser1@mslnsaas1.com	msuser1@mslnsaas1.com	<a href="#">search again</a>	contains all of :	contains all of : a	is :	is :	contains all of :	
mslnsaas1	msuser1@mslnsaas1.com	msuser3@mslnsaas1.com	<a href="#">search again</a>	contains all of :	contains all of :	is :	is :	contains all of :	
mslnsaas1	msuser1@mslnsaas1.com	msuser1@mslnsaas1.com	<a href="#">search again</a>	contains all of :	contains all of :	is :	is :	contains all of :	

## 6.5 Access Log

For the same compliance requirements, the EEA offers an Access Log as an audit trail for all archive access. The Access Log notes individual user archive access as well as any emails that were viewed.

1. Use the tool bar on top to search through the Access Log
2. Click “Export to Excel” to export the log as an Excel spreadsheet.

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Current Path: log -> Access Report

Access Log Archive Access Log

Username: [msuser1@m] Search Export to Excel Next Page > Last Page

Company Name	Username	Action	Subject	Sender	IP	Date
mslnsaas1	msuser1@mslnsaas1.com	login			0:0:0:0:0:0:1	2012-01-01
mslnsaas1	msuser1@mslnsaas1.com	login			0:0:0:0:0:0:1	2012-01-01
mslnsaas1	msuser1@mslnsaas1.com	viewmessage	Stub test	msuser1@mslnsaas1.com	0:0:0:0:0:0:1	2012-01-01
mslnsaas1	msuser1@mslnsaas1.com	viewmessage	hello	msuser1@mslnsaas1.com	0:0:0:0:0:0:1	2012-01-01
mslnsaas1	msuser1@mslnsaas1.com	viewmessage	Stub test	msuser1@mslnsaas1.com	0:0:0:0:0:0:1	2012-01-01
mslnsaas1	msuser1@mslnsaas1.com	viewmessage	Hello	msuser1@mslnsaas1.com	0:0:0:0:0:0:1	2012-01-01
mslnsaas1	msuser1@mslnsaas1.com	login			0:0:0:0:0:0:1	2012-01-01
mslnsaas1	msuser1@mslnsaas1.com	login			0:0:0:0:0:0:1	2012-01-01
mslnsaas1	msuser1@mslnsaas1.com	login			0:0:0:0:0:0:1	2012-01-01
mslnsaas1	msuser1@mslnsaas1.com	login			0:0:0:0:0:0:1	2012-01-01
mslnsaas1	msuser1@mslnsaas1.com	viewmessage	SaaS Partner Advantages	msuser1@mslnsaas1.com	0:0:0:0:0:0:1	2012-01-01
mslnsaas1	msuser1@mslnsaas1.com	login			0:0:0:0:0:0:1	2012-01-01

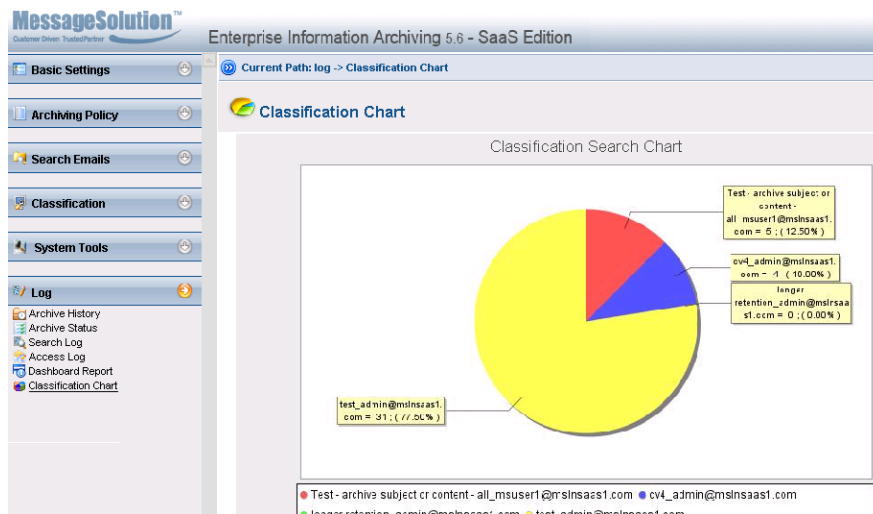
## 6.6 Dashboard Report

The Dashboard Report provides a bar graphs of archive activity. Use the pull down menu to specify a time frame of either 7 days, weekly, monthly, and annually or all.



## 6.7 Classification Chart

The Classification Chart is a Text or graphical display of any Classification Sets on the system which the logged in user has access rights for.



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## Chapter 8: Support

For any questions or concerns, please contact your MessageSolution Representative.

Please feel free to email us at [TechSupport@MessageSolution.com](mailto:TechSupport@MessageSolution.com) or reach support at 1-888-858-7903 / (408) 383-0100. You can find us online at [www.MessageSolution.com](http://www.MessageSolution.com).

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