




MessageSolutionTM

Enterprise Archiving, eDiscovery, Migration



Enterprise Email Archive
Managed Archiving & eDiscovery Services



User 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 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 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 3 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: Archive Access & Email Archiving

2.1 Starting the EEA Web Console

To access the archive, open a web browser and go to: **http://<EEA's IP address>:port/**

Access credentials will be provided by the System Administrator.

2.2 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.

Real-Time Archiving will be enabled or disabled by your System Administrator in accordance with company policy.

2.3 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 email will be archived in one, flat view. This will make it extremely difficult to manage. For more information, please contact your 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 is also enabled/disabled and configured by the System Administrator

2.4 Stubbing

MessageSolution EEA's offers stubbing for large attachments to further reduce data volume on the email server. Stubbed content is moved to the archive while a shortcut is left in its place on the email server. Stubbed messages must be re-downloaded to the email server for viewing. Stubbed content can also be viewed directly from the email with the Outlook/GroupWise/Lotus Notes Plug-In.

2.5 Retention Policy

Retention Policies can be configured by the System Administrator and managed in accordance with Corporate Policies.

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 increasing overall organization and 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, users will have the option of restoring, emailing or downloading the message.

3.1 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, recipient(s), message size, attachment file extension, and date.

The screenshot displays the 'Search Emails' interface. On the left is a navigation sidebar with options: Search Emails, Archive, Basket, Tag, Classification, Supervisees, Folder, and Logout. The main area shows the 'Current path: Search Emails -> Archived Email' and an 'Archived Message' header for 'msuser1@mslnsaas1.com'. Below this is a search criteria form with the following fields:

- 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: []
- Messages for: Past ten years
- Start Date: June - 10 - 2002
- End Date: June - 10 - 2012
- Repository: []
- Tags: []
- Messages Per Page: 50

(Search Archive Continued)

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”. You can also use the ‘not’ feature to exclude certain keywords.
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. 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 allows 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.

<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser1@mslnsaas1.com	test 222	edit	2010-06-18 04:09	3.0k
<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser1@mslnsaas1.com	my test	edit	2010-06-18 04:09	113
<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser1@mslnsaas1.com	here's the email	edit	2010-06-17 13:04	1.2k
<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser2@mslnsaas1.com	test mail	edit	2010-06-17 12:36	113
<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser2@mslnsaas1.com	test mail	edit	2010-06-15 12:37	4.1k

Select Basket:

3.2 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. Click “Delete” to remove an added search condition.

Search Emails

- Archive
- Basket
- Tag

Classification

Supervisees

Folder

[Logout](#)

Current path: Search Emails -> Archived Email

Archived Message

msuser1@mslnsaas1.com [Search](#)

Total Messages 3
Page 1 / Total Page 1

Tags: Search within results

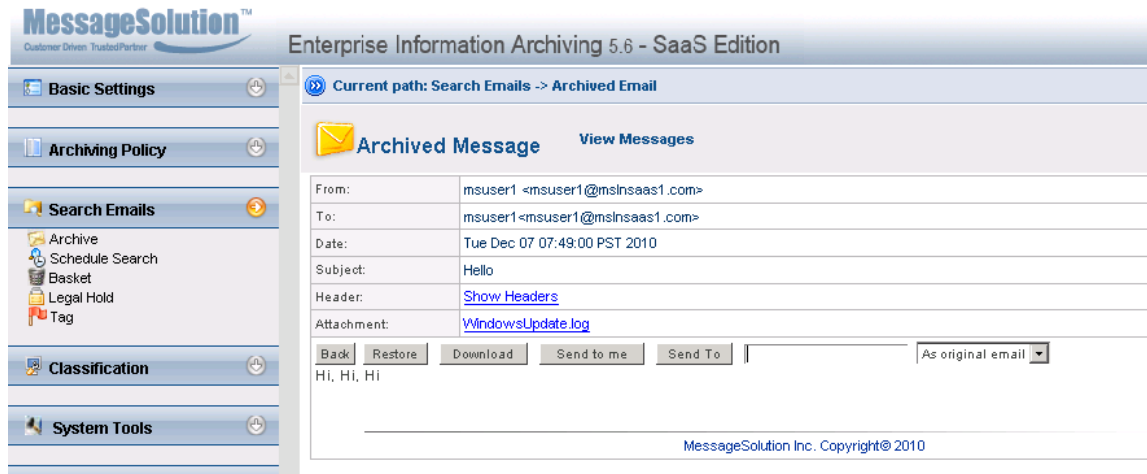
Include

Required	Name	Value
require	contents	MessageSolution

<input type="checkbox"/>	Sender	Recipient	Subject	Tag Info	Message Note	Date	Size
<input type="checkbox"/>	msuser4@mslnsaas1.com	demouser1@saasdemo2.com	SaaS Solutions from MessageSolution		edit	2010-06-24 14:48	17.4k
<input type="checkbox"/>	msuser1@mslnsaas1.com	msuser1@mslnsaas1.com	MessageSolution BrainShare Press Release		edit	2010-06-24 13:31	29.1k

3.3 Accessing Emails

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

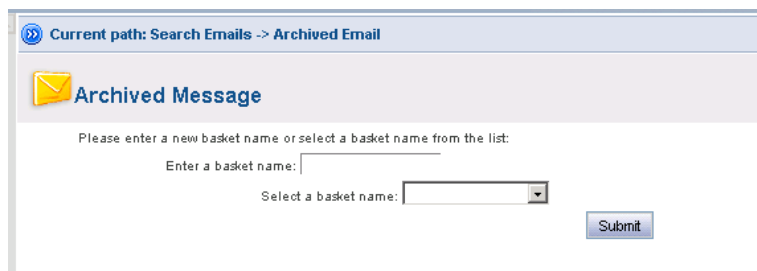


1. Click “Restore” to restore the email to its original location on the email server. The message will be restored to the mail server with original metadata.
2. Click “Download” to download the message only a local computer in EML format. The message will also contain original metadata. To download emails 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.

3.4 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)

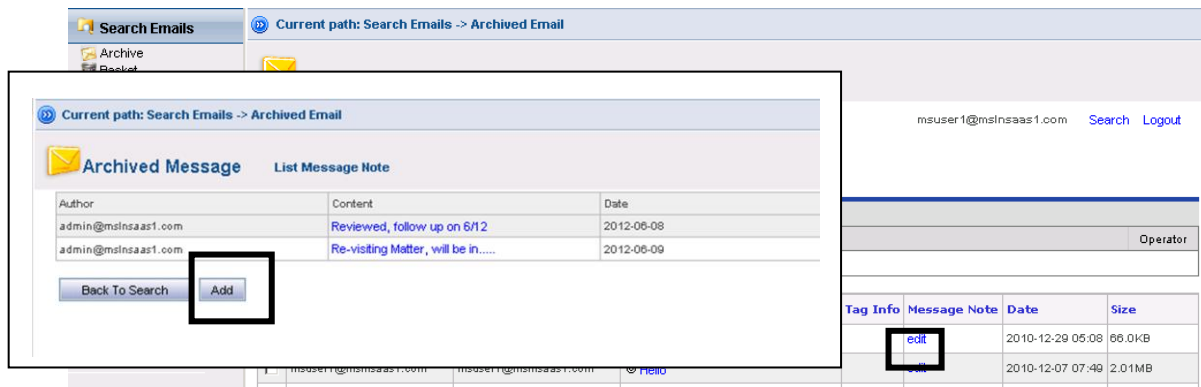
- From the “Basket menu, users can search through each basket. Click “View” to open basket and search basket content.



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

3.5 Annotation


The annotation feature allows users 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 the Content link to review existing notes or click “Add” to create a new one.

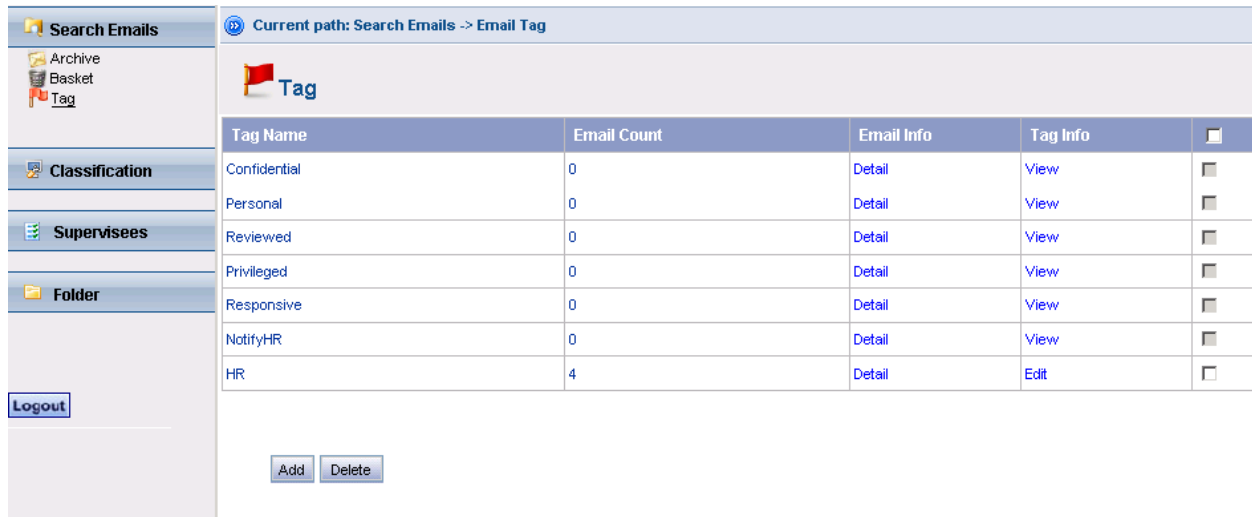


3.6 Tagging

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.



The screenshot shows the 'Email Tag' interface. On the left is a navigation sidebar with 'Search Emails', 'Archive', 'Basket', 'Tag', 'Classification', 'Supervisees', 'Folder', and 'Logout'. The main area shows the current path 'Search Emails -> Email Tag' and a 'Tag' header with a flag icon. Below is a table with columns: Tag Name, Email Count, Email Info, Tag Info, and a checkbox. The table lists tags: Confidential (0), Personal (0), Reviewed (0), Privileged (0), Responsive (0), NotifyHR (0), and HR (4). Below the table are 'Add' and 'Delete' buttons.

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

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.

4.1 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 shows the 'Classification Tree' interface. On the left is a navigation sidebar with 'Search Emails', 'Classification', 'Supervisees', and 'Folder'. The main area displays the current path 'Classification -> Email Classification' and an 'Add Classification' button. Below this is a search bar with 'record per page' set to 10 and a 'Search' button. A table lists the classification nodes:

Classification/Node Name	Parent Node Name	Node property	Add by User	Edit	Search B
<input type="checkbox"/> Test - archive subject or content - all	Classification Tree	Classification	msuser1@mslnsaas1.com	Edit	Classificati

At the bottom of the main area is a toolbar with 'Add Classification', 'Add Node', and 'Delete' buttons.

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

The screenshot shows the 'Set Classification' form. It includes a 'Classification Name' field and a 'Common Condition' section. The 'New condition or exception' section has the following fields:

- Logic Operator: and
- Message Size From: 0 KB To: 0 KB
- Messages for: Last twelve months
- Start Date: June 10 2011
- End Date: June 10 2012

At the bottom right are buttons for 'Add New Condition', 'Remove Condition', 'Remove All Conditions', and 'Save All Conditions'.

4. Enter the classification criteria and save.

Chapter 6: Supervisees

While the typical user only has access to their personal archive, the System Administrator can grant supervisor access. The Supervisees menu will allow permitted users to search through other user's archives and access emails.

5.1 Supervisee Searches

Search Emails Current path: Search Emails -> Archived Email

Classification

Supervisees

- All supervisees
- My Example
- msuser2
- msuser3

Folder

[Logout](#)

Archived Message

theexample.

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:

Messages for: Past ten years

Start Date: June 10 2002

End Date: June 10 2012

Repository:

Messages Per Page: 50

1. To search through Supervisee archives select the user whose mailbox will be searched or select "All Supervisees"
2. Enter desired search criteria as you would for a standard archive search.
3. Same access options are available to access messages (i.e. download, restore, etc) if configured by the System Administrator.

Chapter 7: Folder

Due to advanced system integration, the EEA replicates the email folder structure for ease of use and organization.

6.1 Email Folder Tree

Use the folder tree under the Folder Menu to locate and organize emails in your personal archive

The screenshot displays the MessageSolution web interface. On the left is a navigation pane with a 'Folder' menu containing items like Calendar, Contacts, Deleted Items, Drafts, Inbox, Journal, Junk E-Mail, Notes, Outbox, PST Migration, RSS Feeds, Sent Items, and Tasks. The main area shows the 'Archived Message' view for the user 'msuser1@mslnsaas1.com'. A table lists 18 messages with columns for Sender, Recipient, Subject, and Date.

Sender	Recipient	Subject	Date
msuser1	msuser1@mslnsaas1.com	Stub test	2010-12-29 06:08
msuser1	msuser1@mslnsaas1.com	hello	2010-11-16 12:02
msuser1	msuser1@mslnsaas1.com	hello there	2010-11-12 10:58
msuser1	msuser1@mslnsaas1.com	test	2010-10-21 06:48
msuser4	demouser1@saasdemo2.com	SaaS Solutions from MessageSolution	2010-06-24 14:48
msuser4	msuser3@mslnsaas1.com	SaaS Hosted Archiving	2010-06-24 14:47
msuser4	msuser1@mslnsaas1.com	Great Customer News!	2010-06-24 14:44
msuser1	msuser1@mslnsaas1.com	MessageSolution BrainShare Press Release	2010-06-24 13:31
msuser1	msuser1@mslnsaas1.com	my own test on pst	2010-06-24 01:56
msuser1	msuser1@mslnsaas1.com	pst testing	2010-06-24 00:49
msuser1	msuser1@mslnsaas1.com	archiving	2010-06-23 23:43
msuser1	msuser2@mslnsaas1.com	FW: more test	2010-06-23 23:39

Chapter 8: Support

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

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



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.

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