



MailS@fe for Outlook/Exchange E-mails

Compliance E-mail Archiving, Indexing and File Space Savings

MailS@fe Frequently Asked Questions (FAQ's) - January 2007

Questions invariably fall into five main categories and they are as follows:-

- General operational questions re Exchange, Outlook, Network, Database etc
- E-mail indexing or 'tagging' to a SQL Database
- E-mail Compliance
- E-mail File Space Savings
- Price and licensing arrangements

General Operational Questions

1. Is MailS@fe a separate application to Outlook?

No. MailS@fe is completely integrated with Outlook with the same 'look and feel' - there is no need to launch a separate application. A four button toolbar is added to the Outlook toolbar for all day to day operations as well as Administration set up.

2. What versions of Windows and Exchange etc does MailS@fe run with?

MailS@fe runs with Exchange, Outlook, SQL server versions 2000 and above together with Windows NT and above.

3. Are the actual e-mails stored in the SQL database?

No. The SQL database is used to store all the e-mails header information e.g. From/To/CC/BCC e-mail addresses, Date, Subject and Text data in the message.

4. Where are the actual e-mails stored?

They are stored in a separate folder that is defined at the set up stage and can be on a completely different server to the SQL database. A pointer within the SQL database points to the relevant e-mail in the folder when viewing the e-mail.

5. Is a single instance of each e-mail stored or are there multiple copies as one e-mail is copied to many people?

MailS@fe uses single instance archiving, whereby only one copy is kept of each e-mail message irrespective of the number of people it's been sent to or received from or copied to.

6. How secure are the e-mails that are stored in the folder?

All e-mails are compressed and encrypted with a 512 bit algorithm and are safe from any attack - they cannot be changed or altered. Compression saves about 50% file space i.e. 70% for the email's text and about 30% for the attachments.

7. What about multiple Exchange servers spread around the network, will MailS@fe cope with these?

Yes.

All Exchange servers can have their e-mails captured by a MailS@fe service and sent to the one SQL database that can be located anywhere on the network.

8. Does the SQL server have to be on the same server as Exchange?

No. It can be on the same server or SQL can be on any other server on the network.

9. Are all inbound, outbound and internal e-mails captured?

Yes. All sent, received and internal e-mails are automatically captured. The SQL database is updated and the e-mails filed to a separate folder after compression and encryption. All e-mails are captured and none are missed.

10. Are you able to delete any e-mails?

No.

11. Does MailS@fe affect the way that users currently use e-mails and Outlook in general?

No. Users will receive and send e-mails as they do now, there will be no change in the way that they do their jobs or go about their business. They will still be able to use all the other features within Outlook e.g. set flags, set up tasks, reminders etc.

12. Does MailS@fe use Active Directory?

Yes. MailS@fe does run with Active Directory. If however Active Directory is not used then the Administrator can still set up User Groups and allocate users to those groups from within MailS@fe.

13. Can 'captured' e-mails in the SQL database be searched for and retrieved?

Yes. All e-mails that the user is entitled to search for and view can be very quickly searched for, found and viewed in their original Outlook format, including attachments. The user is able to reply, forward, save, print and use all the standard functions from within Outlook to the retrieved and viewed e-mail.

14. Can e-mails be 'returned' from the SQL Database back to the user's Mailbox?

Yes. E-mails that users may have 'lost' or previously deleted from Mailboxes etc can be searched for and found in the SQL database and returned to the user's Mailbox.

15. Can the user search and find e-mails belonging to other people or groups?

No. The user can only search and find e-mails where their e-mail address is part of the e-mail header i.e. their e-mail address is in the From, To, CC or BCC'ed fields and are therefore entitled to view the original e-mail.

N.B. If however an e-mail has been indexed or 'tagged' (see question number 24) then the user is able to see all e-mails sent or received by all members within the group.

16. How fast is the search and retrieval of e-mails from the SQL database?

Retrieval speed is important and speed is achieved by firstly making an enquiry to the SQL database e.g. find me all the e-mails from XYZ at A N Other and then displaying the results in a Search Results List. A preview pane alongside each e-mail will show a summary of the e-mail so that the user can quickly identify the e-mails that they want to view.

Click on the e-mail in the Search Results List and immediately it is displayed in its original format.

17. Can you refine the searching as you can in Google for example?

Yes. You can search within results to refine your search.

18. Can you have multiple search conditions?

Yes. You can have multiple 'AND' conditional searches e.g. find all the e-mails in a from/to date range, and contain the word 'payment' in the subject, and have a 'contract number 12345' in the message.

19. Can you do 'free text' searches on the subject line and message contents?

Yes. You can search for the occurrence of single or multiple words as well as phrase searches in the subject line as well as the contents of the e-mail message. You cannot however apply these searches to attachments.

20. Are there any other types of searches that can be made?

Yes. Advanced SQL searches can be easily built up e.g. find all e-mails with PDF attachments with a file name containing Budg* and 2006, or find all e-mails that have been sent out with a BCC'ed e-mail address. Indexing and 'tagged' searches are covered between questions 23 to 33.

21. Can the number of users who have access to the SQL database of e-mails be limited?

Yes. It can be limited to only the Administrator and senior personnel or to as many users as required via Active Directory.

With limited access to Administrator and senior personnel then covert random checks can be made on what e-mails are being sent or received.

22. Can 'captured' e-mails be used as evidence in a court of law?

Yes. They are a true record of what has been sent or received and cannot be changed or altered in any way. As long as the e-mails can be produced in a timely manner and there is evidence that the systems and procedures are in place to ensure the accuracy of the content, then e-mails have the same status as paper based systems.

However, there are a considerable number of laws around the world today e.g. Sarbanes-Oxley, Freedom of Information Act, Data Protection Act etc that appear to contradict each other in some areas. It is far better to be safe than sorry, therefore an approach whereby all e-mails are captured and filed so that a true record is maintained is the pragmatic approach in this day and age.

E-Mail Indexing or 'tagging' to a SQL database

23. Are the index or 'tagging' fields over and above the header information e.g. Date, From/To, Subject, Message Content etc

Yes. The index fields are additional to the basic e-mail data that is already automatically stored in the SQL database. The user selects the e-mails together with the index or 'tagging' data and this is added to the basic e-mail data in the SQL database i.e. the user decides which e-mails are to be indexed or 'tagged'.

24. Can an indexed or 'tagged' e-mail be made available for searching and viewing to users in the same group or team?

Yes. Once indexed or 'tagged' the e-mail can be searched for and viewed by all users in the same group i.e. all the members of a team/group have access to team/group specific e-mails. This overcomes the problem of users filing e-mails in their own Mailbox under their own folder headings that are likely to be different to everyone else's.

25. How many index or 'tag' fields can be used for indexing or 'tagging' e-mails?

Up to six index or 'tag' fields can be used. These are normally set up at installation time and can be added to or amended as and when required by the System Administrator. Each field can be a 'drop down list' from which selections can be made or they can be 'free text'. Drop down lists can be created by importing a file from an existing system e.g. Account Numbers, Supplier Code etc

26. Can some or all fields be mandatory?

Yes. Normally one or two primary fields are set to being mandatory e.g. Customer Number, Contract Number, Branch Identifier etc.

27. What is the actual process for indexing an e-mail?

From the user's view of e-mails within Outlook, select the e-mail or group of e-mails to be indexed and click on MailS@fe's 'Archive' button in the toolbar. Select the index values from drop down lists or enter free text for each index or 'tag' field and click the 'Accept' button. This is all within Outlook and no other application needs to be loaded.

28. How is each indexed e-mail associated with a group?

This is an automatic process because each user is associated with a group or team by using Active Directory or by using the Group and User set up facility within MailS@fe. As each e-mail is indexed then these group setting are automatically applied.

29. Can indexed selections be changed or corrected at a later date?

Yes. Editing facilities exist to correct incorrect indexing.

30. What happens if someone doesn't want anyone else to see or view an indexed e-mail?

You can set an e-mail to be a 'Private' e-mail that no one else can see or view or have access to. This facility is commonly used by senior personnel when extremely confidential e-mails are involved.

31. How easy is it to search on indexed or 'tagged' fields?

It's as simple as clicking on the 'Search' button in MailS@fe's Toolbar that is immediately below Outlook's own Toolbar. Select the search field values from 'drop down' lists or key in the 'free text' data relating to the six index fields and click the Accept button. A Search Results List of e-mails that match the search criteria will be shown on the screen together with a preview pane showing brief details of each highlighted e-mail in the list.

To view an e-mail in its original format simply select the e-mail to be viewed from the list.

32. Can you search on index or 'tagged' fields as well as header information (From/To, Date, Subject etc) as well as 'free text' and advanced searches?

Yes. You can easily combine search criteria and still use the Search Within Results facility to further refine your searches.

33. After indexing or 'tagging' and e-mail or group of e-mails can the user automatically delete the indexed e-mails from their Mailbox?

Yes. An option exists whereby indexed e-mails can be automatically deleted from the Mailbox, or they can be retained in the Mailbox and deleted manually later or left permanently in the Mailbox.

E-mail Compliance

34. Are all e-mails 'captured' by MailS@fe?

Yes. All sent or received e-mails both external and internal are 'captured' to a SQL database. None are missed or omitted.

35. Can any e-mail in the 'compliance' database be edited or deleted?

No.

36. Are Audit Trails maintained for any actions by the Administrator for example?

Yes. Comprehensive audit trails are maintained.

37. Who can search and view e-mails in the 'compliance' database?

The Systems Administrator will set up rights via Active Directory as to which users have or have not access to search and view compliance archived e-mails. Where a user has rights to access then they will be able to only search and find e-mails sent or received by other users within their Group or where their e-mail address is part of the From/To, CC or BCC fields.

38. Can you use all the search facilities in MailS@fe to access e-mails in the 'compliance' database?

Yes. You can search on index or 'tag' fields, header information (From/To, Date, Subject etc), 'free text' as well as Advance searches. In the Search Results List colour coding is used to distinguish index or 'tagged' e-mails from 'private' e-mails and non-indexed e-mails.

39. Can compliance 'captured' e-mails be used as evidence in a court of law?

Yes. They are an exact copy of the original e-mail, and have been compressed and encrypted so that no changes or alterations can be made. Similarly, if an e-mail is not found in the SQL database then it has never been received.

40. How safe and secure is the SQL Database and the e-mail folder?

The SQL database and associated folder that contains the compressed and encrypted e-mails is outside of Exchange, and can be backed up and restored totally separately from Exchange. If Exchange 'crashes' for any reason then users will still have access to their e-mails via the compliance database.

E-mail File Space Saving

41. Does MailS@fe help solve some of the file space and quota problems associated with Exchange mailboxes?

Yes. Firstly, any e-mail that has been indexed or 'tagged' can, after any appropriate action has been taken, be deleted from the user's mailbox, either automatically or by the user themselves. If a deleted e-mail needs to be viewed again, a simple search using the index fields or header information searches or text searches or all combined together will quickly identify the e-mail so that it can be viewed in its original format. If necessary it can be returned to the user's Mailbox.

Secondly, an option exists whereby e-mails in users Mailboxes that are older than a certain date e.g. six months, can be automatically 'swept up' out of the Inbox and Sent folders and auto-indexed to the SQL database. 'Swept up' means that they are deleted. The 'sweeping up' feature can be applied to individual users, groups as well as everyone, if required.

42. A number of users retain their old e-mails 'just in case they might be needed sometime in the future'. How can you overcome this approach?

All e-mails are 'captured' in the SQL database, and these same 'captured' e-mails can have index or 'tagged' fields added to them. None of these e-mails are ever lost or deleted and are always accessible via the powerful, fast search facilities that exist within MailS@fe. It is much easier to search and find e-mails using MailS@fe than it is to use Outlook's Find function and it is easier to file e-mails using MailS@fe's indexing or 'tagging' to a SQL database. No matter if the e-mails have been indexed or not they can still be found, viewed and returned where necessary to the user's own Inbox in their Mailbox.

With the knowledge of the above paragraph there is no need to retain old e-mails 'just in case'.

43. Can the size of Exchange's database be managed?

Yes. Deleted e-mails space in Exchange can be re-used and your Systems Administrator will know the steps that are needed to re-claim this previously used disk space.

Price and licencing arrangements

44. What is the price?

MailS@fe is supplied on an annual licence basis with a single annual fee. There is no limit on the number of users, number of Exchange Servers, and the fee also includes annual support and maintenance, upgrades etc. The single annual fee may vary from country to country and may also vary due to time limited promotions.

MailS@fe is a software product designed, authored and copyrighted by Techne-Comm Ltd

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