

# Automatic Email Indexing Module Datasheet



Mailsafe's Automatic Email Indexing software is supplied together with Mailsafe's Email Compliance and Indexing modules. The Automatic Email Indexing software eliminates the need for manual indexing or filing of emails because it runs in the background and does not intrude or impose itself on the normal day to day throughput of emails via Exchange.

Email addresses and/or domain names are unique to a person or an organisation. Within your company or organisation you probably also have unique identifiers for your Client Accounts, Project Codes, Matters etc. The idea is to set up a table linking email addresses or domain names to your Client Accounts or Project Codes or Matters etc. Where you have regular email correspondence then it's worthwhile including the email address or domain name in the table. As emails are sent or received via Exchange, Mailsafe will automatically look at the email addresses, perform a 'look up' in the table and where a match occurs automatically apply the Client, Project, Matters etc data from the table that is associated to the unique email address.

What does Mailsafe do with the automatically collected Client, Project, Matters etc data?

When an email is automatically indexed with Client, Project, Matters etc data, this data is added to the SQL server tables in Mailsafe's central archive repository.

Mailsafe's Compliance module archives all emails to a central repository. This central repository is a combination of a SQL server and a Mailstore. The SQL server holds all relevant data about each email e.g. From, To, Date, Time, Subject Line, Message text as well as six index fields etc. The Mailstore holds a compressed and encrypted copy of each email together with attachments. Pointers from the SQL server connect to the emails in the Mailstore.

How is the automatically indexed data used?

Searches for emails are made directly from Outlook and can be solely on indexed data i.e. Client Code, Project Code, Matters etc or can be solely on header information e.g. From, To, Date, Subject, Message text etc or a combination of both Indexed and Header information. A Search Results List is shown of all matching emails together with preview panes, the original email can be viewed and returned if required to the user's Inbox/Sent box.

How many Index fields a can be used for Automatic Indexing?

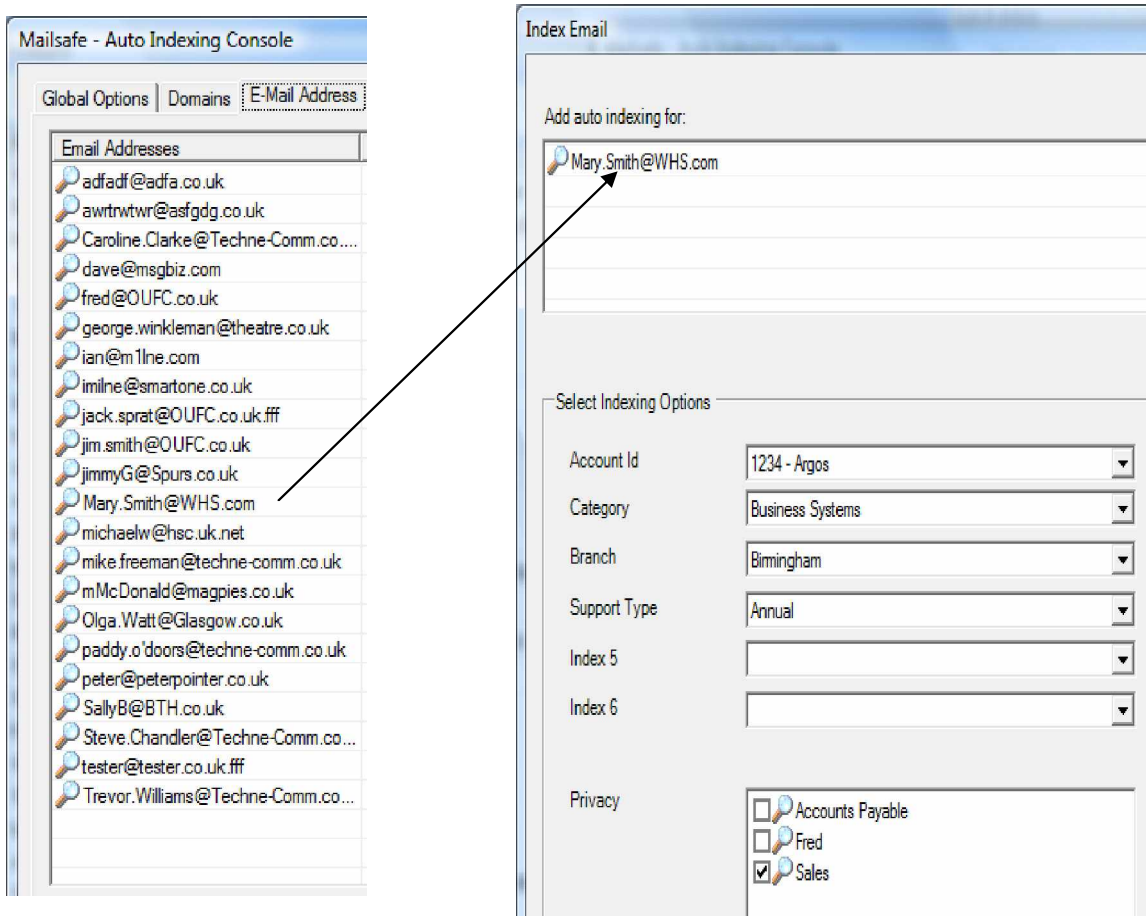
Up to six index fields can be used for automatic indexing e.g. Client Id, Name, Category, Tax Year etc.

What are the benefits of using Automatic Indexing?

- The indexing or filing process is automatic and runs in the background. It is non-invasive and guarantees that no email is mis-filed, and is always accurate.
- When searching for emails then both sent and received emails can be viewed in chronological order, which means that the complete email dialogue can be easily viewed.
- Saves about 30 minutes per person per day in email filing time.
- With Mailsafe Compliance having a copy of all emails in their original format, automatic indexing provides a way of 'filing' these emails without any manual intervention.
- Manual indexing can also be used for less frequent email addresses.



Example of creating an Email Address table together with allocating to Indexes.



This means that every time an email is sent or received where the email address is [Mary.Smith@WHS.com](mailto:Mary.Smith@WHS.com) then automatically the following indexes will be applied 1234-Argos, Business Systems, Birmingham, Annual in their respective headings.

What are the software requirements for running Mailsafe Auto Indexing?

Mailsafe works with Exchange 2000/2003/2007 as well as Outlook 2003/2007. You will need a MS SQL Server database (SQL 2000 and above) together with associated licences, and .NET v2 on both Exchange server and client PC's with SP2. As recommended by Microsoft, Mailsafe does not use 'stubby' in Exchange. For users running POP3 then only manual indexing/tagging of emails is available and not auto indexing. You will need storage capacity for storing the emails in Mailsafe's Mailstore although the storage requirements will be a lot less than Exchange because of compression techniques. Mailsafe will run on a LAN or WAN.

Mailsafe Indexing Module and Outlook.

Mailsafe Indexing is unique because it is the only product on the market that offers indexing of emails and that fully integrates with Outlook as an Add-In.



For example, searches of the central archive repository of emails are made from Outlook using the Mailsafe toolbar. Users are able to search and view emails that they 'own' i.e. they sent/received or were CC'ed or BCC'ed in on the email and return them in their original format to their Inbox if they want to. Active Directory groups can be used to give rights to view to all members' emails in the group so that emails can be easily shared by members in the Group e.g. HR, Sales, Accounts Payable etc.

Other Mailsafe Modules in the Email Management Range of Software.

Mailsafe Compliance – automatically archives all emails to a central repository in their original format. All emails are compressed and encrypted for security reasons and the whole system is forensically sound. Certain types of emails can be excluded e.g. SPAM, out of office replies, music file attachments etc. For more information see Mailsafe Compliance Datasheet.

Mailsafe's Mailbox Size Reducer – manage Mailbox sizes using emails older than specific dates e.g. older than 60 days, 90 days, 365 days rather than quotas. Old emails can be 'swept up' into the central archive. Thereafter older than dates can be applied and where an email is older than the date, then delete from the Mailbox. This action can be taken safe in the knowledge that a permanent record is kept in the central repository of all emails and can be found, viewed and returned if necessary to the user's inbox in its original format. Mailbox Size Reducer is a background function that once set up, different 'older than' dates can be applied to individuals or groups of users, will run uninterrupted in the background.

Mailsafe Indexing/Tagging of emails – six index fields can be used for indexing emails from within Outlook. Indexed data is added to the central repository data for fast searching and displaying results of both sent and received emails together that match the search criteria. Searching can be a combination of header information i.e. From, To, Date, Subject, Message text etc as well as Indexed data. Indexed emails can be shared with other members is Active Directory groups.

Mailsafe PST Sweep Up – emails in PST spread all over the organisation and/or in public folders on the network, can be swept up into Mailsafe's central archive repository so that there is a permanent record of all emails in one manageable place. Swept up emails can be indexed, searched for, viewed and returned to in their original format.

Mailsafe Web Access – the central Mailsafe central repository can be accessed by Mailsafe Web Access enabling searching for both current and old emails via web browser. Has the same look and feel as other Mailsafe products.

For more information visit <http://www.mail-safe.co.uk/> or go to the Downloads tab at this web site to download other Datasheets, view the FAQ's or to view video demonstrations.

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