

Summary

The Mail Archive Service is a Windows Service that monitors one or more mailboxes on one or more mail servers and archives emails from them into Document Manager.

Licensing is based on the number of email addresses that are to be archived; usually one per mail user, for example, if capturing mails from jack@mycompany.com and jill@mycompany.com, that would require 2 mailbox licenses.

Emails are extracted from the relevant mailboxes, converted to .msg or .eml files with relevant indexes and passed to the Document Manager Import Service for importing into Document Manager.

Document Indexing

Any number of indexes can be defined for the Document Manager Indexes; each can be populated from the email attributes including:

- Received (date/time)
- Sent (date/time)
- From
- To
- Subject
- Size
- Attachments (number)

Partial information can be extracted from email fields, for example, a Policy Number can be extracted using Regular expression from the message subject or body.

Field data can be translated to provide useful information, for example, a domain name @document-logistix.com can be translated into a company name like 'Document Logistix'.

Documents can be indexed to one or more drawers, for example, all emails can be saved to an Email Archive Drawer, and then emails with a 'Claim Reference' can be archived to a Claims drawer (for example). If more than one drawer is defined, subsequent copies are only references to the main copy.

Inclusion/Exclusion Rules

Mails can be included or excluded based on rules, for example, when the message contains key words or phrases, like Viagra or 'Receipt Confirmation'.

FAQs

Can I capture sent items as well as received items?

Yes, either use an email rule to forward Sent Items to a specific mailbox to be monitored, or use Journaling on Exchange Server to Journal all sent items to a specific mailbox.

What Email Servers/Services are supported?

Any mail server that can be accessed using POP3 or IMAP4.

Can custom logic be applied to the Archiving?

Yes, there is an API hook that allows the exported emails and index files (XML) to be edited before being passed to the Import service, so any custom requirements can be met, such as database lookups etc.

Do I have to manually define ALL mailboxes to be archived?

No, there is a 'learn' facility that allows the service to learn the mailboxes to be archived from a given domain name, up to the limit of the license.

Can the Service be scheduled?

Yes, one or more schedules can be defined with start and stop times and frequency of polling between the times.

What happens to Emails once Archived?

They are deleted from the mailbox. If you want them to remain in the mailbox, set up a rule to forward to another mailbox to be archived, so that they remain in the original mailbox.

For example, Jack wants all his emails archived, so he defines a rule in Outlook that forwards selected emails to an 'Archive@' mailbox. The mail service will archive everything sent to that mailbox, but Jack's original mailbox items will remain.

Can the Service run on the same server as other DM components?

Yes, subject to suitable performance. Ultimately, you will need the Mail Archive Service, the document import service and an instance of Document Manager (rich client) running.

System Requirements

- Document Manager Enterprise edition 2.6 or later.
- Document Manager Import Service.
- Microsoft Windows OS (2003, 2008 Server 32-bit or 64-bit) with .NET 3.5 and 1 GB RAM.