

IBM FileNet Email Manager 3.7.1 Version 1.1

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The Business Challenge

Over the past decade, email has become one of the most heavily used methods of communication within the workplace. With business decisions, official memoranda, and other valuable records encapsulated in email messages every day, mailboxes end up being ad hoc filing systems for critical corporate content.

Massive email volumes and regulatory pressures are forcing organizations to manage their email more effectively. Email of business value needs to be managed with the same due diligence and best practices as other corporate documents. The risks of not doing so can be substantial – ranging from the inability to find email containing important information to the loss of millions of dollars during litigation due to misplaced, deleted, or damaging emails. Unfortunately, given numerous recent cases publicized in the media related to email mismanagement, there is clearly a disconnect between what organizations need to do with respect to email management, and what they've actually done to date.

As a communication tool, email has obvious advantages of speed and convenience, but it also presents several challenges, which can be organized into the following five categories:

1. Email Administration

Because IT departments typically limit the size of user mailboxes, end users often resort to moving messages from their inbox to other, usually uncontrolled, locations across the network. As a result, important messages can end up archived on back-up tapes, network drives, private folders, public folders, or local hard-drives. With no set policies, controls, or appropriate technology in place, end users, as well as most records management groups and IT departments, often struggle to recover these messages when the need arises.

IT Administration

Email systems were never intended to support the need to manage and archive large volumes of business data for long-term storage. With the increasing volume of email circulating within corporate email systems, combined with user mailbox size limits, administrators are struggling with the management of email systems storage space, long-term backup strategies, as well as effective email retrieval.

These email administration problems can be explained by many factors:

- An increasing number of email messages are being archived in an ad hoc manner to various public folders, local hard drives, network drives, and back-up tapes every day, making them difficult or impossible to find.
- There are often multiple copies of duplicate email stored in several locations.
- A large portion of email being archived has no business value, and thus takes up unnecessary disk space and administration time.

- The ease of using email reply and forward, as well as the ability to attach documents, has caused a great increase in storage requirements.
- In most cases, email messages are not indexed, making it very difficult for end users and administrators to locate and retrieve specific, relevant information.

Costs associated with email administration can escalate very quickly, particularly in the event of a need to search through large volumes of messages to support legal proceedings, as noted above.

End-User Administration

Most email users feel overwhelmed by the large number of email they receive every day. As a result, end users must either delete important email, or else spend several hours a week organizing, filing, and culling messages in order to keep them for future reference or to comply with organizational email retention policies.

2. Customer Relationship Management

The vast majority of organizations today use email to communicate with their customers. Establishing effective management of that email is a cornerstone to improving an organization's relationship with its customers.

An important objective in servicing a customer is speed and efficiency, but too many organizations don't meet this requirement on a consistent basis. One of the main reasons for this lack of timeliness is the inability to connect or integrate the email system with the Customer Relationship Management (CRM) system. More specifically, the lack of connectivity between the CRM and email systems can cause the following issues:

- It becomes very difficult to link or add email and attachments to CRM systems.
- If possible at all, emails or attachments can only be added to the CRM or content management systems one at a time, and the many index fields to fill out makes the process inefficient.
- Email correspondence cannot be centrally shared with other customer service representatives.

This means that customer service representatives must constantly shift between the two systems in order to hunt down the email messages required to effectively address customer requests. The results are callback delays, frustration, lower agent productivity, and possibly loss of business. For most organizations, inefficient processes or lost customers show up on the bottom line very quickly.

3. Regulatory Compliance

With more organizations across industries using email more frequently as a means to communicate with customers, partners, suppliers, as well as regulatory bodies, effective and compliant email management has become imperative.

For instance, the heavy use of email as a formal communication tool within the financial industry, and more specifically within the broker-dealer segment, has led to updated regulations by the US Securities and Exchange Commission (SEC) and the National Association of Securities Dealers (NASD). In order to comply with these regulations, brokerage firms and financial institutions not only need to enforce proper email usage and retention policies, but also implement an effective email archive system that can be audited at any time. Many organizations still do not have the proper technology to manage email in a way that complies with these regulations.

The financial industry is not alone in requiring organizations to formally manage their email communications. Regulations related to the health industry (HIPAA), manufacturing (21 CFR Rule 11), and various privacy and information protection legislations (GLBA, PIPEDA), also exist and must be adhered to. In addition, the Sarbanes-Oxley Act (SOX), which was passed by US Congress in 2002, impacts financial reporting processes and the management of all relevant associated information and records (including email) in public companies.

Non-compliance due to ignorance of the law as it relates to email is simply not a defensible position, particularly in light of the fact that email is now recognized as a bona fide corporate record, and thus must be managed accordingly. The penalties for not complying are hefty: the press is littered with news items recounting stories of corporate malfeasance related to email mismanagement.

4. Records Management Compliance

Prior to the introduction of email, business communications were primarily in the form of paper-based letters, faxes, memos, reports, and other documents. Valuable documents were sent to the Records Department for classification as part of the formal corporate records management process, where corporate knowledge was secured and stored for future reference.

The requirements for this process have changed significantly with the advent of electronic-based forms of correspondence. Unfortunately, the records management procedures for many organizations have not kept pace to meet the challenges that email presents.

As official records of business, such email messages need to be managed within the same framework as other corporate records, with appropriate disposition and retention schedules applied to them. Simply archiving messages in stand-alone repositories with little or no integration into the organization's records management system can result in more administrative work and duplication of effort when it comes time to properly dispose of records.

Furthermore, many organizations lack policy guidance with respect to email—coupled with inefficient management of email as records, such lapses in policy can ultimately pose more risk for the company in the long run.

5. *Electronic Discovery*

In case of a lawsuit, involved parties have to go through an often lengthy process called legal discovery. As part of this process, lawyers may request that all case-related email messages be made available within a specific time frame. Email is considered valuable evidence and is often labeled the “smoking gun” of modern litigation because it preserves conversations, important business decisions, and documents. Some of the greatest challenges faced by organizations involved in such a discovery process include:

- Recreating the email message stores used during specific time periods (often many times over).
- Determining which email messages, residing within the organization, meet the discovery request.
- Of the email retrieved, distinguishing which emails need to be delivered and which are protected under privacy and privilege laws.
- Determining the impact of these emails on legal strategy.
- Absorbing the cost of discovery (typically very high).

Because most organizations do not have formal email retention and destruction systems in place, third party auditors, consultants, and internal IT resources often have to be brought in to scour back-up tapes of email servers and network drives. Moreover, data mining tools and custom programming are sometimes required to search these pools of messages and “metadata.” Consequently, the discovery process often becomes a very expensive exercise that also distracts internal staff from their normal workload. The costs associated with recreating these email conversations can potentially run into the hundreds of thousands of dollars. This often results in a desire to settle the case since the costs associated with mounting an effective response become so high.

The Email Manager Solution

With so much critical business information contained in email, and with the massive volumes flowing through organizations today, it is essential that organizations implement an efficient, effective, and fully integrated email management system.

IBM FileNet Email Manager is a proven solution that automates the process of capturing email messages as business records, simplifies the retrieval of messages for compliance purposes, and effectively solves email storage issues, while also offering significant opportunities for improving business processes. It is the first intelligent email management solution which provides the means to effectively address both tactical and strategic email issues. Email Manager's flexibility and scalability allows organizations to resolve immediate issues as well as proactively manage ongoing and future email requirements.

IBM FileNet Email Manager is the industry's only solution that is:

- **Automated:** Email Manager selectively captures email messages based on the value of the content and automates the entire email lifecycle by leveraging the capabilities of IBM FileNet Records Manager.
- **Seamlessly Integrated:** Email Manager leverages IBM's industry-leading ECM solutions, including out-of-the-box integration with IBM FileNet P8, IBM FileNet Records Manager, and IBM FileNet BPM.
- **Enforced:** Email Manager alleviates the burden from end users and systems administrators by invisibly enforcing consistent compliance and email policies throughout the enterprise.

This unique combination of features makes Email Manager superior to email archiving solutions on the market. Email Manager is the only email management solution that enables customers to store and manage their email – over 90% of their electronic content – in the same way as they manage all other electronic documents in their organization.

Email Manager offers a proven solution that addresses records management, compliance, and regulatory issues around email, and delivers additional benefits by providing an effective way of leveraging and sharing email content to improve business processes across the enterprise.

Email Manager is part of the IBM FileNet P8 suite of products and is fully integrated with the IBM FileNet P8 architecture. Content Services and Image Services are also supported. Email Manager's tight integration with IBM FileNet Records Manager (RM) helps organizations adhere to records management policies and file plans by simplifying the declaration of emails as corporate records.

Furthermore, by capturing and centralizing important corporate email, the Email Manager solution provides additional benefits beyond records management and risk mitigation by enabling email content to be leveraged and shared with business functions and processes across the enterprise.

- **Effortless Capture:** To ensure that users adhere to corporate email retention policies, the capture process of an email management system should be as simple as possible. Email Manager offers a fully automated and centralized email capture process, where messages that match your business rules are automatically indexed and archived in your IBM FileNet repository. In addition, administrators can schedule Email Manager to review mailboxes and folders on the network to capture older email that has not yet been archived in IBM FileNet. Users can also capture email of business value through a simple drag and drop process.
- **Real Time Search and Retrieval:** Using IBM FileNet's standard search capabilities, employees with appropriate security privileges can quickly and easily access individual captured messages and attachments, or the entire email conversation thread. Email Manager also allows you to perform keyword and full-text searches on all stored email as well as associated attachments, ensuring comprehensive retrieval of all relevant content.
- **Records Management:** By using Email Manager, organizations can improve and simplify compliance with electronic records management policies. Email Manager's tight integration with IBM FileNet Records Manager allows the declaration of email as records during the capture process, regardless of whether automatic or manual capture is preferred. This integration eliminates the need for a separate declaration step and reduces opportunity for user error. When capturing email of corporate value with Email Manager, organizations can easily ensure adherence to established file plans and email retention policies.
- **Critical Knowledge Management:** By centralizing important corporate email in a secure IBM FileNet repository, organizations can immediately start sharing the wealth of knowledge captured by Email Manager. Whether email is used for contract negotiations, accounts payable and receivable, or customer service, the Email Manager solution provides the flexibility and availability required to streamline these and other critical, content-centric business processes.
- **Business Process Improvement:** Email Manager effectively manages corporate email as part of a comprehensive IBM Enterprise Content Management system, allowing critical messages to initiate and play a significant role in business processes. Email Manager offers organizations a means of connecting email content to business processes within the enterprise, providing value and tangible results above and beyond the initial investment.

By leveraging and enhancing IBM's Enterprise Content Management systems, IBM FileNet Email Manager provides an overall solution that conveys great benefits to organizations. Some of those business benefits include:

- **Reduce email storage administration and processing:** Email Manager effectively solves email storage and administration issues by providing an automatic way of capturing and indexing email messages in an IBM FileNet repository instead of the corporate email server.

- **Reduce corporate risk:** Email Manager helps organizations mitigate risks associated with non-compliant content passing through corporate email systems. It ensures that pertinent email messages are captured and easily retrievable, and also offers an email monitoring option.
- **Increase corporate-wide productivity:** By automating the email capture and indexing process, Email Manager increases organizational efficiency by freeing up employees and administrators from spending several hours managing email.
- **Meet records management and regulatory compliance requirements:** Email Manager helps organizations comply with established electronic records management policies by ensuring that all important email messages are properly archived and easily retrievable for analysis or timely destruction.
- **Improve customer service and overall business responsiveness:** By linking Email Manager to a Customer Relationship Management (CRM) system, appropriate front-line personnel can have direct and timely access to all customer related email along with the rest of an organization's customer records, making the overall customer service process and experience much more efficient.

As email usage continues to grow within the workplace, it is becoming essential to properly capture and manage the knowledge contained within corporate email systems. The IBM FileNet Email Manager solution will provide your organization with the above benefits and ensure that today and tomorrow's stringent email management requirements are fulfilled.

Email Manager Architecture

Overview

IBM FileNet Email Manager is a server-based email management tool built for use with corporate email systems – Microsoft Exchange, Lotus Domino, and Novell GroupWise – and IBM FileNet repositories (IBM FileNet P8, Image Services, and Content Services).

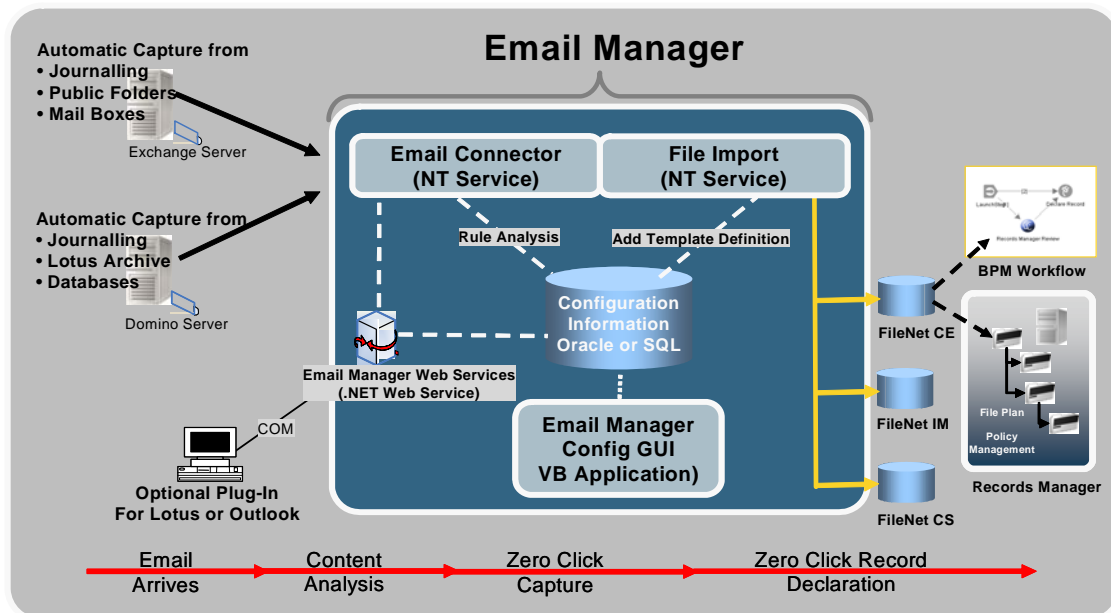


Figure 1. IBM FileNet Email Manager 3.7 Architecture

Email Manager resides on a Microsoft Windows server and sits between the email server and the document repository. Two services run on the Email Manager server: an Email Connector and a Repository Connector. The Email Connector is specific to the email system to which Email Manager is connected – Exchange, Lotus, or GroupWise – and the Repository Connector is specific to the repository to which Email Manager is connected. A single Email Manager server may connect to only one type of source email system and one type of target repository.

In order to connect to source email server(s), Email Manager must be able to connect to the email server over a network. This requires the Email Manager server to be in the same domain as the source email server or in a separate domain that has a trusted relationship with the domain in which the source email server(s) reside. Email Manager also requires a single administrative account on each source email server in order to facilitate a connection and enable Email Manager to take actions on the server. In order to connect to an IBM FileNet P8 repository, the Email Manager server must be on the same domain as the IBM FileNet P8 repository. This is a design restriction of IBM FileNet P8.

Configuration settings and duplicate hash codes (if duplicate management is used) are stored in a MS SQL or Oracle database.

In addition to the Email Manager server, an optional plug-in for Microsoft Outlook, Lotus Notes, and Novell GroupWise clients is available and can be installed on users' desktop computers to allow for the manual capture of email messages from within the users' mailbox. The Email Manager server uses its own web services to communicate with client machines on which the Email Manager client plug-in is installed. When a user manually captures an email, the client plug-in communicates with the Email Manager server via SOAP to retrieve a list of profiles and capture the email appropriately.

Network Architecture Scenarios

The diagrams below illustrate two sample scenarios:

- Small organizations or departmental implementations with one email server and one IBM FileNet repository.
- Large enterprise implementations with multiple email servers, where two departments share the same IBM FileNet repository and another department has an independent IBM FileNet repository.

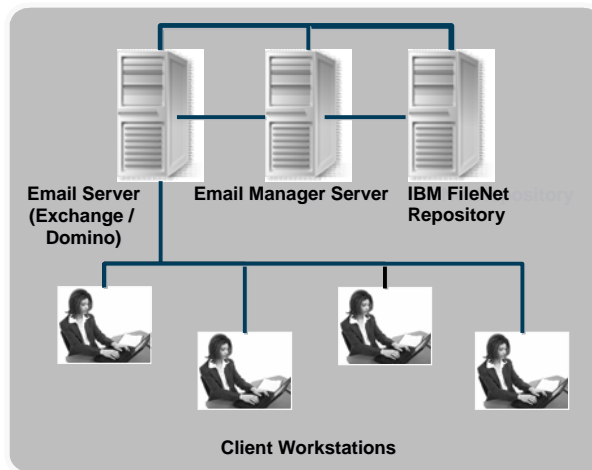


Figure 2. IBM FileNet Email Manager 3.7 network architecture for single implementations

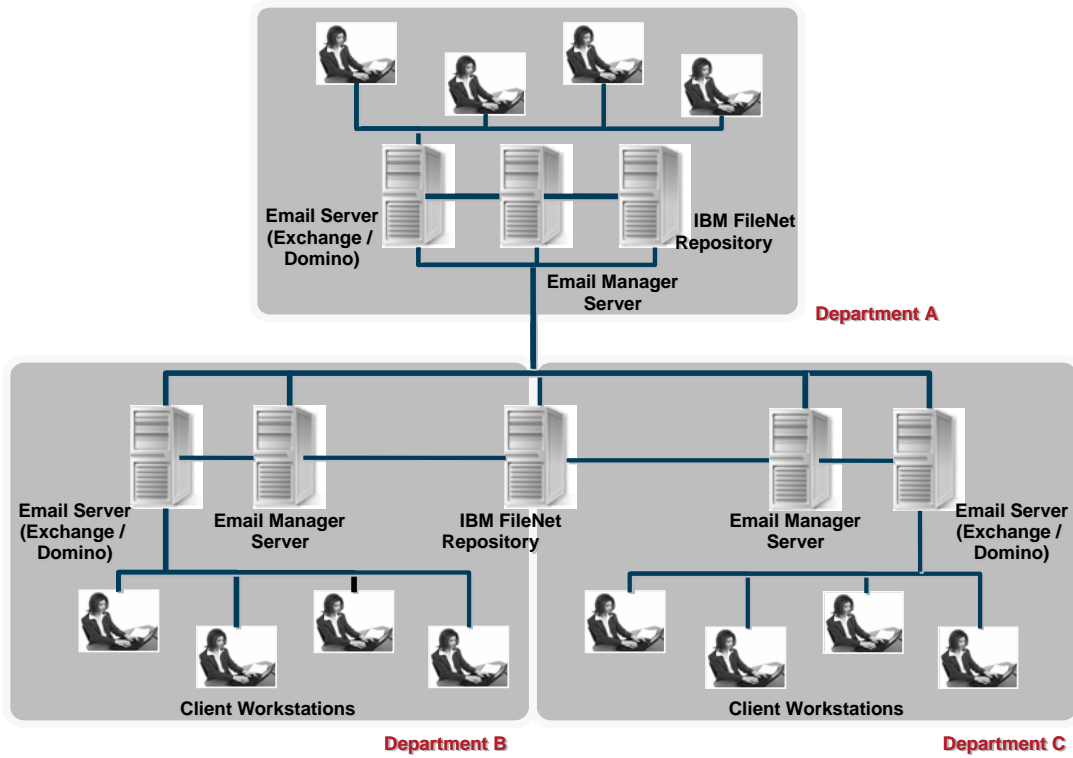


Figure 3. IBM FileNet Email Manager 3.7 Network architecture for large implementations

Note that many different options for email server/IBM FileNet Email Manager server configurations are possible, depending on organization size, volume of email, and business requirements. For more advanced topology configurations, please contact IBM.

Capturing Email

The following high-level diagram depicts IBM FileNet Email Manager interactions with the source email server and IBM FileNet repository when capturing email.

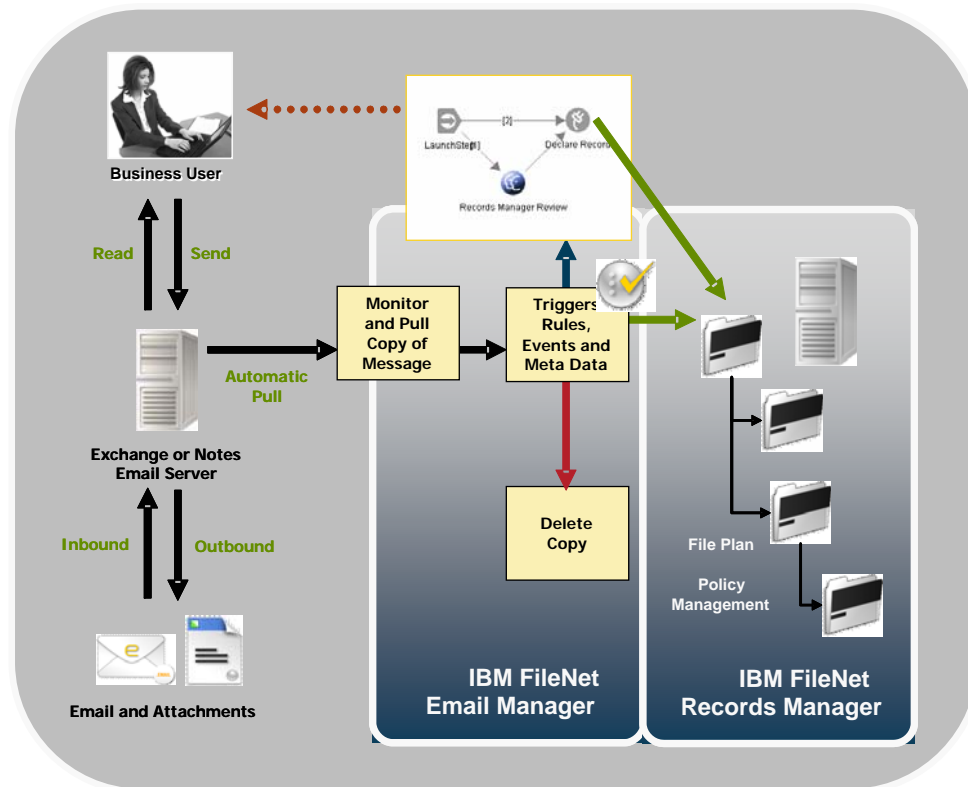


Figure 4. IBM FileNet Email Manager 3.7 Conceptual Diagram for Email Capture

The IBM FileNet Email Manager server is an unattended server process that automatically applies a set of configurable business rules to all incoming and outgoing email to determine whether an email should be added to an IBM FileNet repository. If the IBM FileNet Email Manager server determines that an email meets a specific rule, it is added to the document repository according to the specifications in the profile associated with the rule (i.e. “automatic capture”).

The IBM FileNet Email Manager client is either a plug-in (Microsoft Outlook) or integrates directly with the email client (Lotus Notes), which may be used by end users to select which emails should be added to the IBM FileNet repository (i.e. “manual capture”).

Additional information on how Email Manager captures email is contained in the Email Manager Configuration section of this document.

Security Model

The security model for Email Manager is based on the IBM FileNet Security Model, which specifies what particular level of access users or groups have to view captured email and attachments. Generally, users who appear in the To, From, CC, and BCC fields of an email are granted access to the message content once it is captured.

Because the security model for IBM FileNet Email Manager is based on the IBM FileNet Security Model, and security for Image Services is limited compared to Content Services and IBM FileNet P8, the option to set document security based on who sent and received the email (i.e. users appearing in the To/From/CC fields) is not available in Image Services. In most cases, security will be configured so that either all users see all email in Image Services or a static set of users or groups see all email and all other users or groups are excluded.

When Email Manager is used in conjunction with Records Manager, the user-level security defined in Email Manager will be subordinated to security defined in Records Manager (i.e. if email recipients do not have security access to the record class assigned to the email when it is declared as a record by Records Manager, they will not have access to the email in IBM FileNet P8 even if the security set in Email Manager would normally provide them with access to the email in IBM FileNet P8).

For maximum flexibility, security models can be configured differently for each specific Profile.

IBM FileNet API Support

Email Manager 3.7 uses the DCOM API to connect capture documents into IBM FileNet repositories. Due to the use of the DCOM API there are some known issues when using Email Manager with an active-passive CE cluster.

High Availability/Failover Support

Email Manager 3.7 supports the use of Veritas Cluster or Microsoft Cluster software to provide high availability/failover support in an active/passive cluster. Optionally, multiple Email Manager servers can be configured to provide a symmetrical server configuration to leverage hardware more efficiently for High Availability/Failover. In this configuration, an Email Manager server can – in addition to its own processing work – take on the processing work of another Email Manager server until the problem is fixed.

For an example of synchronous failover support, if two profiles are being used to capture all email: Profile 1 is running on Server 1, and Profile 2 is running on Server 2. If Server 1 fails or is failed over, both Profiles would be run on Server 2 until Server 1 is again online.

For standard failover support, if two Profiles are both running on Server 1, with Server 2 not processing any email: If Server 1 fails, then Server 2 would process both Profiles.

VMWare Support

Email Manager will be qualified for use with VMWare ESX Server 2.5 VMWare GSX in a production environment.

Citrix Support

The Email Manager client will be qualified for use with Citrix MetaFrame in a production environment.

Email Manager Configuration

Email Manager configuration is accomplished using a single administration tool – the Configuration Manager.

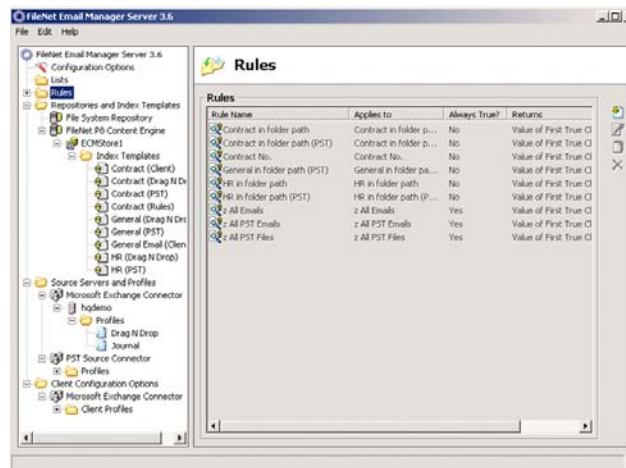


Figure 5. Configuration Manager main screen

An administrator configures Email Manager to either constantly, or on a scheduled basis, recursively move through all of the monitored email server or mailbox/database locations, comparing email to business rules. These business rules are based on either the emails' metadata properties (such as "To" or "Subject") or the contents of the text of the email.

Once an email is determined to match a business rule, a profile is applied to that document before it is added to IBM. A profile defines not only indexing information such as target folder location within IBM as well as other properties, but also defines the policy for the organization as to what should be done with the email when it is located. These policies allow Email Manager to take action on the email such as delete it, replace it with a shortcut, or leave it alone while still recording its existence. (The availability of these features varies with the email system with which Email Manager is being used. See the Configuration Options table later in this document for specific capabilities available for Microsoft Exchange, Lotus Domino, and Novell GroupWise.)

Automatic and Manual Capture Options

There are four ways Email Manager can be configured to capture email: automatic server-based capture, scheduled server-based capture, manual drag & drop capture, and manual client plug-in capture. Using one of these methods, Email Manager can capture email and upload them to a central IBM FileNet repository where security is added and the messages indexed. Each method has advantages and disadvantages. Any combination of the three methods of capture can be used together in an organization to fit their business needs.

Automatic Server-based Capture (Active Monitoring)

Email Manager is configured to monitor specific mailboxes on an ongoing basis and immediately process all email as they arrive in the mailbox. This feature enables Email Manager to monitor all email traffic on an email server while remaining transparent to users.

The Email Manager server monitors either specific mailboxes (the only option available for GroupWise) or the Journaling location (using a login provided by the Mail Administrator). In a Journaling situation, a copy of the incoming email is passed to the Journal location while the original is delivered to the intended recipients. Email Manager evaluates the email copy in the Journal location. The email will either match a capture rule and be added to IBM, or will not match any rules. Journaling is the preferred method of monitoring a large number of mailboxes or entire mail servers for Exchange and Lotus. A common misconception is that Journaling will double a mail server's storage, when in fact additional storage requirements are minimal as Email Manager deletes the email copy in the Journal location once it has been processed.

Email Manager uses profiles (templates linked to rules) to determine if, how, and where to add an email to the IBM FileNet repository. Folder location, property mappings, and document security are all specified in profiles on the Email Manager server.

Once an email has been captured, Email Manager will undertake any configured processing options (such as icon change, delete email, replace with a shortcut, strip attachments).

Email from Microsoft Exchange is stored in .MSG or .TXT format. When retrieved from IBM, .MSG format email can be opened in Outlook and responded to or forwarded like any other Exchange email message. Messages from Lotus Domino are stored in DXL (Domino XML) or .TXT format. Messages in DXL format can be re-imported into Lotus Notes using the DXL Viewer that is installed with the Email Manager client plug-in. GroupWise messages are stored in an XML representation viewable through the GroupWise Message Viewer installed on the GroupWise client. All email connectors also offer the option of storing email as plain text.

Once in an IBM FileNet repository, the email and any attachments are content indexed and searchable using the Verity engine.

Automatic Server-based Capture (Scheduled Monitoring)

Email Manager is configured to "crawl" the email system on a scheduled basis to look for email that meet specific business rules and process them. The most common uses of passive monitoring are for processing legacy email in the email system and for performing scheduled processing options such as "delete email after 90 days" (see below).

Manual Drag & Drop Capture

Email Manager is configured to monitor mailboxes (using active monitoring) and process email that end users “drag & drop” into the mailbox. The most common use of drag & drop is to provide users with a simplified way of manually capturing email that fall into clearly identified categories (e.g. all email related to “contracts” can be dragged & dropped to a public folder titled “Contracts”). Users can simply “drag & drop” as many email as they like into monitored folders and Email Manager processes the email and puts it into IBM based on the profile assigned to the monitored public folder. Specified processing options are applied once the email is captured.

The great benefit of “drag & drop” capture is that there is no client side integration or footprint, it is easy to roll-out to employees, and there is no need to manually index messages.

Manual Capture using the Client Plug-in

This requires the Email Manager client to be installed in the email client (Outlook, Notes, or GroupWise). Using the Email Manager client, end-users can select a capture profile (or create a custom profile) that gives them a great deal of control over how email are captured and classified in the IBM FileNet repository.

Manual capture using the email client plug-in allows users to manually capture select email and save them using their own capture values. This provides the greatest flexibility for determining how Email Manager captures an email, but it also requires more training for users.

Using the Email Manager client, users select one or more email messages in their inbox and click the “Add to FileNet” button on their toolbar. A list of pre-defined profiles is presented. The user selects the profile they want to use (or optionally creates a new one) and the message is captured to an IBM FileNet repository. Optionally, a profile can be configured to prompt the user for index and security values for each email being captured.

There is also an option to prompt users sending mail, asking them if they would like to add their outgoing message to the IBM FileNet repository.

Once in an IBM FileNet repository, email can be located and used in exactly the same way as any other electronic document.

Processing Options

In addition to capturing email into an IBM FileNet repository, Email Manager can perform a number of processing options against the email on the email server. These processing options help control the amount of email on the email server and aids in enforcing compliance rules (e.g., for the destruction of email after a defined period of time). These processing options include:

- Delete the email
- Replace the email body (and any attachments) with a shortcut to the email in the repository
- Replace only the attachment (but not the email body) with a shortcut to the attachment in the repository
- Flag an email that has been captured with an icon
- Perform any of the above on a scheduled basis (e.g. after 90 days or 120 days)

Profiles

IBM FileNet Email Manager uses a concept known as Profiles to manage application configuration. All Profiles are defined using the Email Manager Configuration Manager. IBM FileNet Email Manager Administrators use Profiles to define how Email Manager is configured, the business rules to which it adheres, the criteria to be met in order for an email to meet a business rule and be captured, where and to which repository an email should be captured, and what happens to email remaining on the email server. A Profile breaks down into the following components:

Configuration Settings

Configuration settings include how the IBM FileNet Email Manager Server is set up, which email server(s) (Microsoft Exchange or Lotus Domino) to connect to, and which public folders and/or mailboxes to monitor for email.

Rules

To enable automatic, rule-based email capture using IBM FileNet Email Manager, the administrator must create business rules that determine which email messages should be automatically captured to an IBM FileNet repository. Rules can be configured based on certain email properties, including content of keywords found in the subject line or body of the email, email address domain names (e.g. @business.com), groups defined in an organization's LDAP directory, or whether or not the email includes attachments. Email messages that do not meet any business rules can be ignored or deleted by the IBM FileNet Email Manager Server.

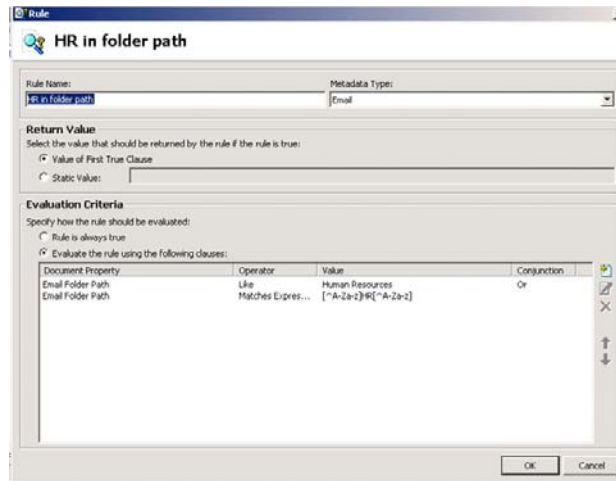


Figure 6. Sample rule screenshot

Index Templates

Index Templates contain the information required to add an email to an IBM FileNet repository, including the name of the repository, how to index the email in the repository (e.g. title, customer name, To, From, Sent Date, etc.), and what security should be applied to the email in the repository. The Index Template also defines whether or not the email is to be declared as a record.

Depending on how a Profile is configured, users may or may not be prompted to manually fill in select Index properties during a manual email capture process. The IBM FileNet Email Manager Administrator ultimately retains control over whether users have permission to access and/or create Index Templates.

Capture Settings

Capture settings describe the actions to be taken on an email or attachment being put into a repository. Capture settings include the format in which an email should be archived, whether or not to archive attachments, and whether or not to archive an attachment with its email or as a separate document.

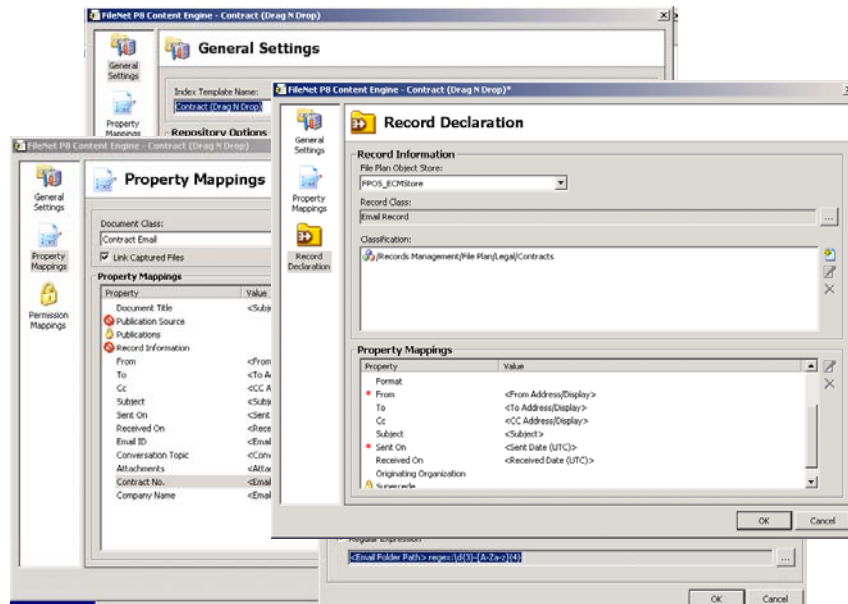


Figure 7. Sample Index Template settings screenshots

Modes

IBM FileNet Email Manager supports three modes of operation: active mode, scheduled mode, and client mode. Active mode monitors specified folders and/or mailboxes and processes new emails against specified rules as soon as they appear in the folder. Scheduled mode processes emails in a specified folder and or mailbox on an administrator-defined schedule (e.g. once a day, once a month). Client mode responds to emails that are manually selected by users for addition to an IBM FileNet repository.

Processing Options

Processing options describe the actions to be taken on the email server and client once an email has been archived in an IBM FileNet repository.

Processing options include the option to delete an email from the client when it is captured to an IBM FileNet repository, to replace the email with a shortcut, or to flag an email as captured using an identifying icon.

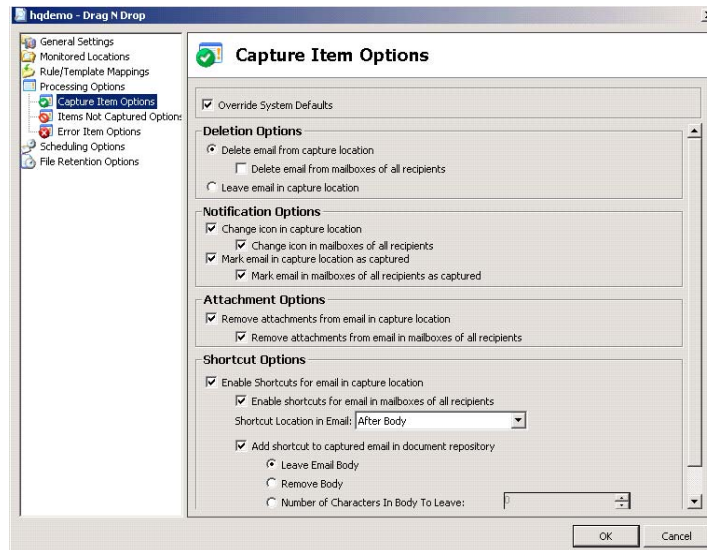


Figure 8. Sample Processing Options screenshot

Using Profiles, administrators can address their organization's unique email capture and archive needs. Administrators typically need to create only a few Rules and Index Templates and use them in conjunction with Mode settings, Capture Settings and Processing Options to create the Profiles they need.

General Features

Email Manager provides a number of features and capabilities that are independent of the email system to which it is connected. This section describes these features.

Email platform specific features are described in the following sections.

Auditing

All transactions performed by IBM FileNet Email Manager (including monitoring and capturing of email) are recorded into an audit log. This log feature is optional and can be enabled through the configuration tool. The different activities recorded into this file include message capture results, IBM FileNet Email Manager server status, and any server errors.

Certifications

IBM FileNet Email Manager 3.7 complies with (but has not been independently certified for) the following standards:

- Department of Defense 5015.2 certification requirements for Records Manager support
- Character encodings of IS-ASCII, ISO-8859, ISO-2022, and UTF-8 in native local environments are supported

Configurable Business Rules

IBM FileNet Email Manager uses a concept known as Profiles to manage application configuration. All Profiles are defined using the Email Manager Configuration Manager. IBM FileNet Email Manager Administrators use Profiles to define how Email Manager is configured, the business rules to which it adheres, the criteria to be met in order for an email to meet a business rule and be captured, where and to which repository an email should be captured, and what happens to email remaining on the email server.

Conversation Thread Management

Conversation threads allow users to group messages on a single topic together from multiple participants. The Conversation Topic is an email property, which is equivalent to the subject of the first message in an email conversation thread. For example, if the first message in a thread is "Software Deployment," the Conversation Topic of all replies and forwards of the message will be "Software Deployment" rather than "RE: Software Deployment" or "FW: Software Deployment."

Since the conversation topic is stored in an IBM custom property field by IBM FileNet Email Manager, users can retrieve messages related to a conversation topic by using either customized IBM FileNet Email Manager search templates or by using standard IBM search tools.

Distribution List Management

When emails are sent to large distribution lists, IBM FileNet Email Manager ensures that all email properties are properly captured. With Email Manager, the full email addresses of all the distribution list members are recorded into a multi-value field.

Duplicate Email Management

IBM FileNet Email Manager provides duplicate email management capabilities to help eliminate the capture of duplicate email messages into the IBM FileNet repository. Duplicate emails – with or without attachments – will be written to an IBM FileNet repository only once. If it is determined that an email being processed by Email Manager already exists in IBM, Email Manager will not store the message twice. When a rule for capturing is met and it is determined that the email is already stored in the repository, Email Manager will continue processing without adding a duplicate to the repository, including creating appropriate links or shortcuts to the existing document as required by the capture rule.

Email Compliance Monitoring and Auditing

IBM FileNet Email Manager offers an effective and flexible way of monitoring email content to ensure compliance with corporate policies and government regulations. By linking Email Manager to IBM FileNet's Business Process Manager, suspect emails become readily available to the administrator and management for analysis through:

- IBM FileNet Stored Searches, or
- A Compliance Monitoring and Reporting Interface. Using IBM FileNet Audit Log functionality, the administrator can configure the system to monitor email against corporate policies and government regulations.

Event-Driven Processing

By linking Email Manager into IBM FileNet's Business Process Manager (BPM), workflows can be automatically triggered so that the appropriate actions can be taken based on content.

Event and Performance Monitoring

Email Manager 3.7.1 provides performance counters and improved logging. These counters and logs can be monitored by using applications such as Windows Performance Monitor and HP OpenView to provide enterprise monitoring of the status and performance of each Email Manager server. The event logs and performance counters in Email Manager 3.7.1 provide the following events and performance monitoring capabilities:

- Email Manager server errors (identification of when an error occurs and why the error occurred).
- Email Manager server activities (actions being performed).

- Email profile status (if the profile is running or idle).
- Email profile history (when the profile last ran).
- Email profile processing (how many email were processed by the profile in total, how many email were processed during the last processing run, the number of locations processed during the last run, and the number of locations skipped during the last run).
- Index Template/Document Class tracking (how many email were captured with each index template/document class pair).

Capture rule tracking (which rule was used to capture each email).

Email Manager also provides Level One support for IBM FileNet System Manager to pass product name, version number and system vital information to the System Manager.

IBM FileNet Repository Support

IBM FileNet Email Manager supports the following IBM FileNet repositories:

- Image Services (IS)
- Content Services (CS)
- Content Manager (CM)
- Records Manager (RM)

In addition, Email Manager 3.7 features an NTFS file system target connector that enables email to be captured and placed in a secure file share location (typically so other business actions can be taken upon them).

IBM FileNet P8 Support

Due limited features support in Content Services and Image Services compared to IBM FileNet P8, not all Email Manager features are available for use with all IBM FileNet repositories. The following are new features available for use only with IBM FileNet P8. They are not available when using Email Manager with a Content Services or Image Services repository:

- Search for folders: End users are able to locate a folder within an IBM FileNet P8 folder hierarchy by conducting a search for the folder, rather than having to browse for it.

- Dynamic P8 folder creation: Email Manager can dynamically create folders in P8 if the folder specified does not already exist. The name of the profile and the folder can be set based on a value returned from the Email Manager profile.
- Hierarchical property support: For IBM FileNet P8 lists that have hierarchical lists associated with them, Email Manager presents the properties as a hierarchy (tree view) from which the user can select a value. (Email Manager 3.5 supports only “flat” (one level deep) choice lists.)
- File in multiple folders: Email Manager supports the ability to add an email and its associated attachments to more than one P8 folder.

Instant Messaging Support

Email Manager is certified for use with IMAuditor™ by FaceTime for the purpose of capturing instant messages and importing them into IBM FileNet P8. IMAuditor collects together an IM conversation and sends it to an email address, which can be an email address on either Lotus or Exchange. Email Manager picks up the email from there and processes as it would normally process any other email based on rules applied against the message contents and message metadata.

Email Manager 3.7 does not currently support the capture of instant messages in Rich XML format. Therefore, the metadata exposed in the instant messages are limited:

- The FaceTime messages are plain MIME messages (not Rich XML) and can be captured by Email Manager. However, the email properties, From, To, etc., bear no relevance to the participants in the message and the subject consists of just a conversation ID. The metadata available in email generated from Instant Messages by IMAuditor is as follows:
 - From: the designated FaceTime user (not the user involved in the IM conversation)
 - To: mailbox that EM will monitor (not the user involved in the IM conversation)
 - Subject: The FaceTime "conversation ID" (not the email subject line)
 - Date: the date the email is sent (not the date the IM conversation started/ended)
 - Body: a transcript of the conversation
- FaceTime IMAuditor does not support IM attachments, so these are lost and cannot be captured by Email Manager.

- FaceTime IMAuditor always generates plain text format (so no formatting or emoticons are available to be captured by Email Manager).

Real-time Search and Retrieval

Through IBM's general searching capabilities via Workplace (see Figure 9), users can execute searches based on any email properties (including: To, From, CC, BCC, Date, and Subject), as well as perform keyword and content searches on all stored email and attachments. Customized searches may be created using IBM FileNet Stored Searches or Search Templates. IBM developers' tools may also be used to create customized searches.

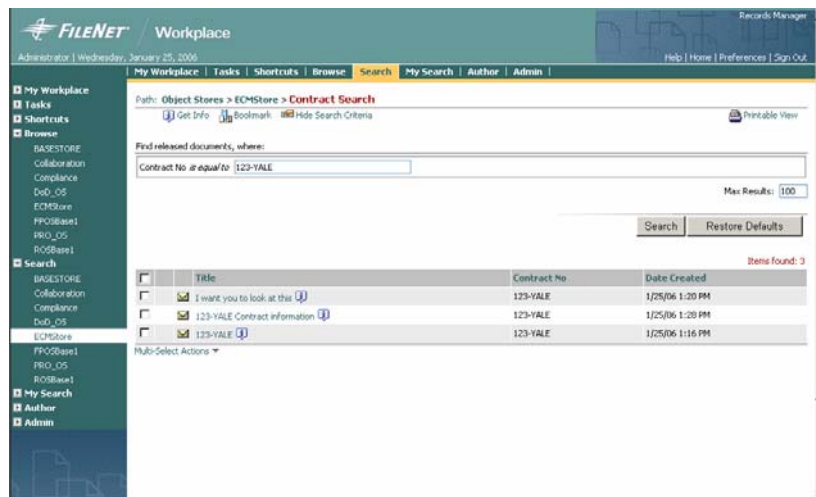


Figure 9. Searching for captured email through Workplace

Alternatively, IBM FileNet Email Manager also includes a customizable web search interface that can be embedded in your corporate intranet or email client toolbar.

Records Manager Support

The IBM FileNet Email Manager solution can also help companies comply with corporate electronic records management policies. It classifies and date stamps email messages so that they are easily retrievable for analysis or timely destruction.

Furthermore, Email Manager's tight integration with IBM FileNet Records Manager supports IBM FileNet ZeroClick functionality to allow the declaration of email as records during the capture process (as part of the profile configuration), eliminating the need for a separate declaration step or event trigger and reducing opportunity for user error. Email Manager includes the following support for Records Manager:

- Declare as a single record: An email and all its attachments can be declared as a single record.

- **Dynamic Records Manager classification:** Replaces the need to hard code Records Manager (RM) classifications with the ability to dynamically assign RM classifications based on a document property value, literal value, regular expression, or calculated value. The most common use of this will be to map a folder path on the file system to a RM classification. Under this scenario, the dynamic assignment feature can dramatically reduce the number of index templates that need to be created and maintained.
- **Recipient-based security on email declared as a record:** Email Manager 3.7.1 provides customers with the ability to assign recipient-based security on email declared as a record. This will ensure individuals sending or receiving email can always access it in P8 even if the security set in Records Manager would otherwise deny them access. The configuration options provided are as follows:

Assign security exactly as defined in the Records Manager file plan.

Assign security as defined in the Records Manager file plan and permit view access to the individual who captured the email (when captured using the Email Manager client plug-in).

Assign security as defined in the Records Manager file plan and permit view access to the individuals on the email send and recipient list.

Email Manager for Microsoft Exchange

Of the three email systems currently supported by Email Manager, Microsoft Exchange provides the most feature-rich platform. For this reason and because it is the most popular email system in use by business, Email Manager supports several features for Microsoft Exchange that are not available with Lotus Notes and Novell GroupWise.

The features listed in this section are either unique for Email Manager for Microsoft Exchange or the implementation and use of features is slightly or significant different from the way the feature is implemented for other email platforms.

Automatic Server-based Capture (Active Monitoring)

To enable automatic, rule-based capture of incoming and outgoing email using Email Manager for Exchange, business rules must be created to determine which email messages should be captured. Message Journaling in Exchange must also be enabled. Depending on network configuration, email volumes, and the number of email clients, enabling Message Journaling may or may not have significant (8 to 12%) influence on the performance of the Exchange server.

At minimum, one public folder or mailbox must be created to temporarily store messages that will be captured. All incoming email messages will be copied using Message Journaling to this folder or mailbox for processing by the IBM FileNet Email Manager server, but will be deleted as soon as they are processed. Depending on email volumes, some extra disk space may be required to store the temporary email messages queued to be processed by the Email Manager server.

When rule-based capture is enabled, the Email Manager server acts as a mediator between Exchange and the IBM FileNet repository. The Email Manager server monitors one or more Exchange public folders or mailboxes for new messages that might require processing. When a message meets a rule defined by your organization as important, its field details are extracted and mapped into IBM properties. A copy of the original email message is then added to the IBM FileNet repository using profiles while the temporary copy in the Exchange folder or mailbox is deleted. The email copy appearing in the user inbox is independent and remains untouched during this process, but is marked with a special icon to show that it has been captured (Figure 10).

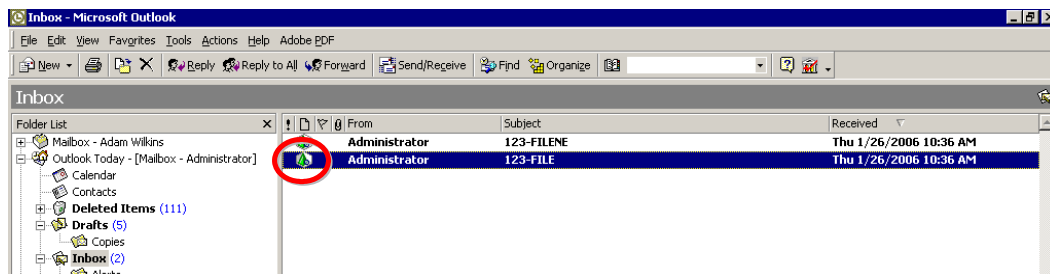


Figure 10. IBM FileNet Email Manager Indicator in Outlook Inbox

Note that when automatic rule-based capture is enabled, it applies to both incoming and outgoing email messages. It also applies to both internal and external emails that pass through the Exchange server.

Automatic Server-based Capture (Scheduled Monitoring)

Scheduled Mailbox Monitoring provides a method for email administrators to process existing email messages on an email server and add them to an IBM FileNet repository. This feature is useful for one-time back-file conversion and the ongoing filtering of old email to remove it from the email server once it has been archived in an IBM object store.

Administrators first define which users' folders they want to archive, the schedule (frequency) for monitoring the folders, and the business rules that determine which email messages should be captured.

Running as a Windows Service, Scheduled Mailbox Monitoring continuously monitors users' mailboxes looking for documents that match criteria defined by the Email Manager administrator. For instance, a policy could be set in place to archive all emails more than 90 days old. Global rules that apply to all messages on the email server may be created or rules specific to mailboxes or folders may be created. A template that defines how the message should be indexed in IBM will be associated with each rule.

Options to delete an email after it has been captured, replace the email with a shortcut to the IBM FileNet repository, or add email attachments to IBM as an attachment or a separate document can be configured as part of Scheduled Mailbox Monitoring.

Manual Capture using the Client Plug-in

Manual capture options are also available for emails that don't match any of the automatic business rules created by your organization, but that are nevertheless deemed to be of business value.

Manual capture may be used in conjunction with, or instead of, rules-based capture. Depending on the type of business, some organizations may prefer to use manual capture exclusively. This allows the end user to utilize the manual capture options to capture email on a case-by-case basis.

To manually capture an email with the Email Manager client plug-in installed, simply use the Email Manager integration into Outlook by selecting "File" from the Outlook menu options and then "Add to FileNet," or simply click on the "Library" icon (see Figure 11) displayed on Outlook's toolbar shortcuts.

This option provides more user control over what index properties should be attributed to emails by giving users access to centralized Profile Index Templates. A profile index template is a template that indicates where and how an email is added to the IBM FileNet repository, and can be created either by the administrator or by users themselves. (The administrator ultimately retains control over whether users have permission to access and/or create profile index templates.)

Another option is to use Outlook's settings and features to create Outlook inbox rules to copy specific incoming messages to a public folder. The rule can send a Carbon Copy (CC) or a Blind Carbon Copy (BCC) to a "Temporary Storage Inbox" (in effect, an Exchange public folder with an assigned email address or a mailbox created specifically for capturing email) while sending the original email to the recipient(s).

This option offers the fastest and the easiest way of manually capturing email. Using this option, email properties are automatically attributed to each email based on business rules pre-determined by the administrator. Emails are then added to the IBM FileNet repository using specified profiles.

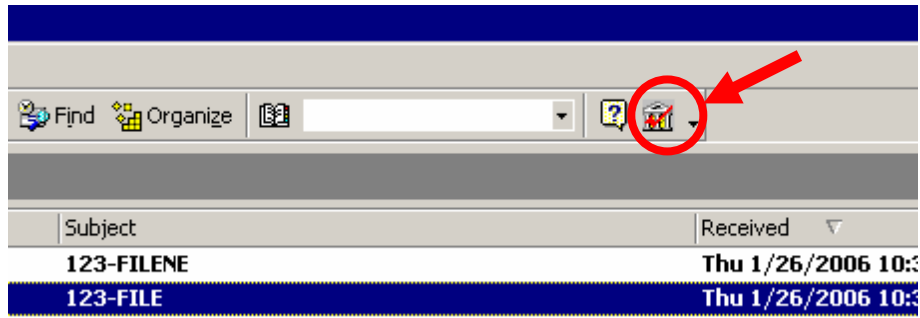


Figure 11. “Library” icon to manually add emails using Email Manager integration in Outlook

Email Manager provides a configuration option to support the capture of outgoing email at the time the message is sent. This is an optional feature in which, when enabled, the end user is prompted with the option to add the outgoing email message to an IBM FileNet repository at the time the email is sent. If the user elects to add the email to an IBM FileNet repository, the user can select the profile to be used to capture the sent message.

Manual Capture using “Drag & Drop”

Email Manager for Exchange can be configured to monitor public mailboxes (using active monitoring) and process email that end users drag & drop into the mailbox. The most common use of drag & drop is to provide users with a simplified way of manually capturing email that fall into clearly identified categories (e.g. all email related to “contracts” can be dragged & dropped to a public folder titled “Contracts”). Users can simply “drag & drop” as many email as they like into monitored folders and Email Manager processes the email and puts it into IBM based on the profile assigned to the monitored public folder. Specified processing options are applied once the email is captured.

The great benefit of “drag & drop” capture for Microsoft Exchange is that Microsoft Exchange supports public folders that can be shared by many users across the network. This means only a single folder needs to be configured for all users who will “drag & drop” email to it. In addition, since there is no client side integration or footprint, it is easy to rollout to employees, and there is no need to manually index messages.

Note that with the “drag and drop” option, users can opt to drag the email to the public folder and remove it from their mailbox entirely, or they can drag a copy of the email to the public folder for capture. In the latter case, the copy remaining in the user’s inbox will show an icon change, as in the situation with automatic capture.

Each Email Manager server can monitor up to 400 individual mailboxes.

Outlook Web Access (OWA) Support

Email Manager users can access their email using OWA. If an email in their Exchange mailbox contains a shortcut, the full email body or attachments can still be retrieved from the IBM FileNet repository by selecting the link in the email.

Email Manager does not support using OWA to manually capture email into an IBM FileNet repository using the Email Manager client plug-in.

Message Shortcuts

IBM FileNet Email Manager provides the option of leaving email shortcuts in user mailboxes in place of captured messages. The shortcut, which will be only a fraction of the size of the original email message, will allow users to easily retrieve their own captured messages and related attachments by simply clicking on the link in their mailboxes. For increased usability, the shortcut can be configured to allow users to preview up to 5,000 characters of the message. This message will appear in the email client preview pane if this is displayed.

Attachments included in the captured email can be handled in three different ways:

- The email can be left intact (with attachments embedded in the email),
- The attachment can be left within the email while a copy of it is indexed and added to IBM as a separate object, or
- The attachment can be separated completely from the email message and added to IBM. (Note that embedded attachments are fully indexed when the Verity search engine included with IBM FileNet Content Services 5.3/5.4 and IBM FileNet Content Manager is deployed.)

The attachments handling behavior is configured in IBM FileNet Email Manager profiles, and consequently, different “types” of emails can have their attachments handled differently.

Since the original email message and the attachment(s) share the same unique identifier (the “Email ID”), users will know which documents come from which emails.

By using preconfigured search templates or standard IBM search tools, users can easily and quickly retrieve those emails and documents.

PST Capture

Email Manager provides the ability to locate personal storage files (PST) on a network and automate the capture of PST archives and files into an IBM FileNet repository. PST files can be selectively processed using profiles set up in the Email Manager Configuration Manager and post-processing options include the ability to delete the PST files from the network or

email system. Email Manager's duplication management capabilities will also apply to PST Management ensuring no duplicate email enters the repository.

Generally speaking, Email Manager operates in much the same fashion for PSTs as it would for any other email. Specifically, the unique aspects of the tool allow organizations to:

- Search and Locate: There are two options for Email Manager to find PST files. The first is by crawling and reporting on and taking action on the PST Archives and Files. The second option (which may be more efficient) is to configure Email Manager to check the Outlook registry for existing PSTs and their location. This process (and the others mentioned below) can be tied to a schedule with options existing from "Run Once" to "Run Daily."
- Capture: The tool is capable of capturing the entire archive or selectively capture PST email files with the help of rules.
- Post Processing: Options include:
 - Deleting the PST Archive (or put to read-only) and/or PST Files from their source location, deleting from the mailbox of all recipients or leaving them in place.
 - Change icon in PST Archive and/or in the mailboxes of all recipients.
 - Mark the archive or email as captured and process to avoid re-processing.
 - Replace email files or email attachments with shortcuts for better mailbox size management in the capture location or in all recipient mailboxes.
- Error Handling: PST archives that are password protected, encrypted, corrupted, or otherwise can't be processed can be tagged. Options include changing the extension to .err or moving the archive to another location. For organizations utilizing IBM FileNet's BPM, they can take advantage of the capabilities in the tool to automate the notification and workflow processes to manage the clean up of these files.
- Audit Reporting: All events are captured in the log files and can be reported on.
- Disable PST Creation: With proper access, Email Manager can disable PST creation by users. This is a very valuable tool to help better manage email from an administrator's perspective but more importantly from a compliance perspective. Your IBM FileNet repository now becomes the one central place to look for and find email records.

Performance

Based on the recommended server hardware requirements, a single instance of Email Manager can typically process over 3 GB of email per hour. This is provided as a guideline only. Hardware, network speed, co-location with other IBM applications, and content indexing can negatively impact Email Manager performance.

For more details, see the Email Manager with IBM Lotus Domino Performance Study from April 2006. Although this performance study was conducted with Lotus Domino and not Microsoft Exchange, informal testing and customer experience indicate similar performance for both platforms.

Email Manager for Lotus Domino/Notes

Lotus Domino/Notes provides many of the same email features as Microsoft Exchange. The most significant difference is the lack of a file format for saving email external to the Lotus Domino/Notes system, resulting in the requirement for a separate DXL Viewer when opening email saved in IBM.

Automatic Server-based Capture (Active Monitoring)

To enable automatic, rule-based capture of incoming and outgoing email using IBM FileNet Email Manager, business rules must be created to determine which email messages should be captured. Message Journaling in Lotus Domino must also be enabled.

Depending on network configuration, email volumes, and the number of email clients, enabling Message Journaling may or may not have significant (8 to 12 percent) influence on the performance of the Domino server. Depending on email volumes, some extra disk space may be required to store the temporary email messages queued to be processed by the IBM FileNet Email Manager server.

When Email Manager rules-based capture is enabled, Domino Message Journaling must also be enabled. At minimum, one public folder or mailbox must be created to temporarily store messages that will be captured. All incoming email messages will be copied using Message Journaling to this folder or mailbox for processing by the IBM FileNet Email Manager server, but will be deleted as soon as they are processed.

When rule-based capture is enabled, the IBM FileNet Email Manager Server acts as a mediator between Lotus Domino and the IBM FileNet repository. The IBM FileNet Email Manager Server monitors one or more Lotus Domino public folders or mailboxes for new messages that might require processing. When a message meets a rule defined by your organization as important, its field details are extracted and mapped into IBM properties. A copy of the original email message is then added to the IBM FileNet repository, while the temporary copy in the public folder or mailbox is deleted. The email copy appearing in the user inbox is independent and remains untouched during this process, but is marked with a special icon to show that it has been captured (Figure 12).

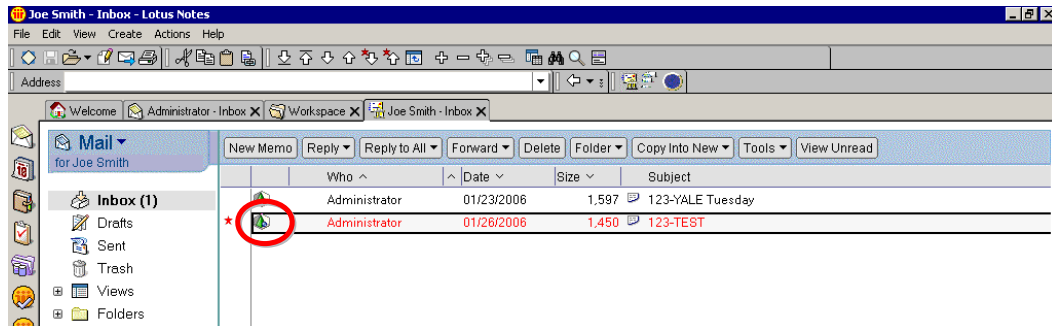


Figure 12. IBM FileNet Email Manager Indicator in Lotus Notes mailbox

Automatic Server-based Capture (Scheduled Monitoring)

Scheduled Mailbox Monitoring provides a method for email administrators to process existing email messages on an email server and add them to an IBM FileNet repository. This feature is useful for one-time back-file conversion and the ongoing filtering of old email to remove it from the email server once it has been archived in an IBM object store.

Administrators first define which users' folders they want to archive, the schedule (frequency) for monitoring the folders, and the business rules that determine which email messages should be captured.

Running as a Windows Service, Scheduled Mailbox Monitoring continuously monitors users' mailboxes looking for documents that match criteria defined by the Email Manager administrator. For instance, a policy could be set in place to archive all emails more than 90 days old. Global rules that apply to all messages on the email server may be created or rules specific to mailboxes or folders may be created. A template that defines how the message should be indexed in IBM will be associated with each rule.

Options to delete an email after it has been captured, replace the email with a shortcut to the IBM FileNet repository, or add email attachments to IBM as an attachment or a separate document can be configured as part of Scheduled Mailbox Monitoring.

Manual Capture using the Client Plug-in

Manual capture options are also available for emails that don't match any of the automatic business rules created by your organization, but that are nevertheless deemed to be of business value.

Manual capture may be used in conjunction with, or instead of, rules-based capture. Depending on the type of business, some organizations may prefer to use manual capture exclusively. This allows the end user to utilize the manual capture options to capture email on a case-by-case basis.

To manually capture an email with the Email Manager client plug-in installed, simply use the Email Manager integration into Lotus Notes by clicking on the Email Manager icon displayed on the Lotus Notes toolbar (see Figure 13 below). The IBM FileNet Email Manager Client user interface appears, and the user is prompted to select a profile index template to apply to the email(s).

This option provides the greatest level of user control over what properties should be attributed to emails by giving users access to centralized Profile Index Templates. A profile index template is a template that indicates where and how an email is added to the IBM FileNet repository, and can be created either by the administrator or by users themselves. (The administrator ultimately retains control over whether users have permission to access and/or create profile index templates.)

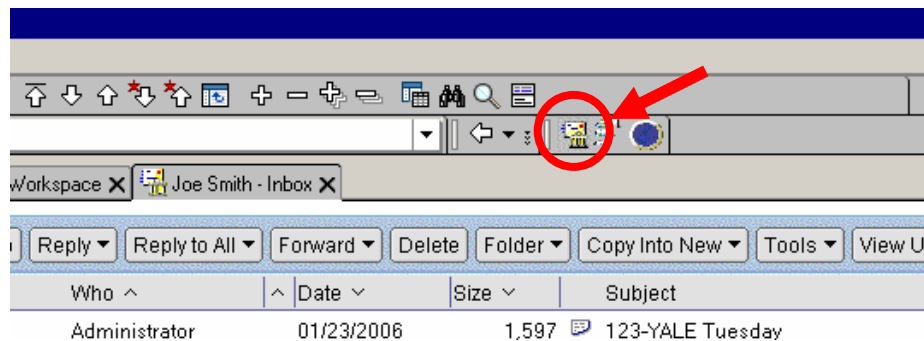


Figure 13. IBM FileNet Email Manager toolbar button

Another option is to use Lotus Notes' settings and features to send a Carbon Copy (CC) or a Blind Carbon Copy (BCC) to a "Temporary Storage Inbox" (which is monitored by IBM FileNet Email Manager) while sending the original email to the recipient(s).

This second option offers the fastest and the easiest way of manually capturing email. Using this option, email properties are automatically attributed to each email based on business rules pre-determined by the administrator. Emails are then added to the IBM FileNet repository using specified profiles.

Email Manager provides a configuration option to support the capture of outgoing email at the time the message is sent. This is an optional feature in which, when enabled, the end user is prompted with the option to add the outgoing email

message to an IBM FileNet repository at the time the email is sent. If the user elects to add the email to an IBM FileNet repository, the user can select the profile to be used to capture the sent message.

Manual Capture using “Drag & Drop”

Email Manager for Lotus Domino/Notes can be configured to monitor mailboxes (using active monitoring) and process email that end users drag & drop into the mailbox. The most common use of drag & drop is to provide users with a simplified way of manually capturing email that fall into clearly identified categories (e.g. all email related to “contracts” can be dragged & dropped to a public folder titled “Contracts”). Users can simply “drag & drop” as many email as they like into monitored folders and Email Manager processes the email and puts it into IBM based on the profile assigned to the monitored public folder. Specified processing options are applied once the email is captured.

In Lotus Notes there is no concept of public folders, so each user must set up their own folders to which they will “drag & drop” email. However, the great benefit of “drag & drop” capture is that there is no client side integration or footprint, it is easy to roll-out to employees, and there is no need to manually index messages.

Message Shortcuts

IBM FileNet Email Manager provides the option of leaving email shortcuts in user mailboxes in place of captured messages. The shortcut, which will be only a fraction of the size of the original email message, will allow users to easily retrieve their own captured messages and related attachments by simply clicking on the link in their mailboxes. For increased usability, the shortcut can be configured to allow users to preview up to 5,000 characters of the message. This message will appear in the email client preview pane if this is displayed.

If Lotus Notes 6.0.3 or higher is installed on the client, then email can be captured in .DXL format, enabling attachments included in a captured email to be handled in three different ways:

- The email can be left intact (with attachments embedded in the email),
- The attachment can be left within the email while a copy of it is indexed and added to IBM as a separate object, or
- The attachment can be separated completely from the email message and added to IBM. (Note that embedded attachments are fully indexed when the Verity search engine included with IBM FileNet Content Services 5.3/5.4 and IBM FileNet Content Engine is deployed.)

The attachments handling behavior is configured in IBM FileNet Email Manager profiles, and consequently, different “types” of emails can have their attachments handled differently.

Since the original email message and the attachment(s) share the same unique identifier (the “Email ID”), users will know which documents come from which emails.

By using preconfigured search templates or standard IBM search tools, users can easily and quickly retrieve those emails and attachments.

DXL Viewer

There is no native file format for Lotus Notes; however, Lotus Notes provides the ability to export information in Domino XML format. Email Manager provides an option to save email in .DXL format in P8 (the other option is TXT). The fidelity of the information saved in DXL format is determined by the version of DXL used to capture the email (Lotus Notes 6.0.3 is DXL v.1.0 and each subsequent version of Lotus Notes includes improved versions of DXL).

To enable email stored in DXL to be displayed independent of Lotus Notes, Email Manager includes a DXL Viewer. The DXL Viewer does not provide the same features or fidelity as opening a DXL email in Lotus Notes, but – as noted – it can be used to view DXL format email without the need to re-import the email into Lotus Notes. In addition, because Workplace does not currently support DXL format email, the DXL Viewer can be installed and configured to open automatically when a DXL format document is opened in Workplace. Once opened in the DXL Viewer, email can be imported back into Email Manager with a single click of the “Import” button.

Support for Lotus Notes Encrypted & Digitally Signed Email

A configuration option to automatically save Lotus Notes encrypted and digitally signed email in .NSF format is available with Email Manager 3.7.1. The use of .NSF format for encrypted and digitally signed email ensures the preservation of the encryption and digital signature when the email is saved to P8. Lotus Notes 7 users may also save Lotus Notes encrypted email in DXL format.

Performance

Based on the recommended server hardware requirements, a single instance of Email Manager can typically process over 3 GB of email per hour. This is provided as a guideline only. Hardware, network speed, co-location with other IBM applications, and content indexing can negatively impact Email Manager performance.

For more details, see the Email Manager with IBM Lotus Domino Performance Study from April 2006.

Email Manager for Novell GroupWise

Novell GroupWise support is new to Email Manager 3.7. Of the three email systems supported by Email Manager, Novell GroupWise is the most limited in terms of capabilities provided. These limitations are largely the result of the architecture of Novell GroupWise and its inability to support many features available with Microsoft Exchange and Lotus Domino/Notes.

Automatic Server-based Capture (Active Monitoring)

GroupWise does not support the concept of a Journal folder as Microsoft Exchange and Lotus Domino/Notes do. Rather than process copies of email passed to a Journal location, Email Manager conducts server-based automated capture by constantly “crawling” the GroupWise system for new email and captures them as they are located. This feature requires Email GroupWise Retention and Sent Item creation to be enabled. The use of Retention is the only way to guarantee that messages are not deleted from the system before Email Manager can capture them. This feature may be implemented per account or domain. The performance impact is negligible, but additional disk space will need to be available to retain messages before they are purged. The system administrator will need to ensure Email Manager processes the items on a regular basis to allow processed email to be purged.

To enable automatic, rules-based capture of incoming and outgoing email using IBM FileNet Email Manager, business rules must be created to determine which email messages should be captured.

When rules-based capture is enabled, the IBM FileNet Email Manager Server acts as a mediator between GroupWise and the IBM FileNet repository. The IBM FileNet Email Manager Server monitors all designated GroupWise post offices and mailboxes for new messages that might require processing. When a message meets a rule defined by your organization as important, its field details are extracted and mapped into IBM properties. A copy of the email message is then added to the IBM FileNet repository. The email copy appearing in the user inbox is independent and remains untouched during this process.

The GroupWise architecture does not support the ability to modify messages. Therefore, no “icon change” to indicate and email has been captured is available. However, a column can be configured in the client to display the number of the rule used to capture an email. In future versions we will include a custom column that better designates the email as captured (instead of putting a “5” in the column).

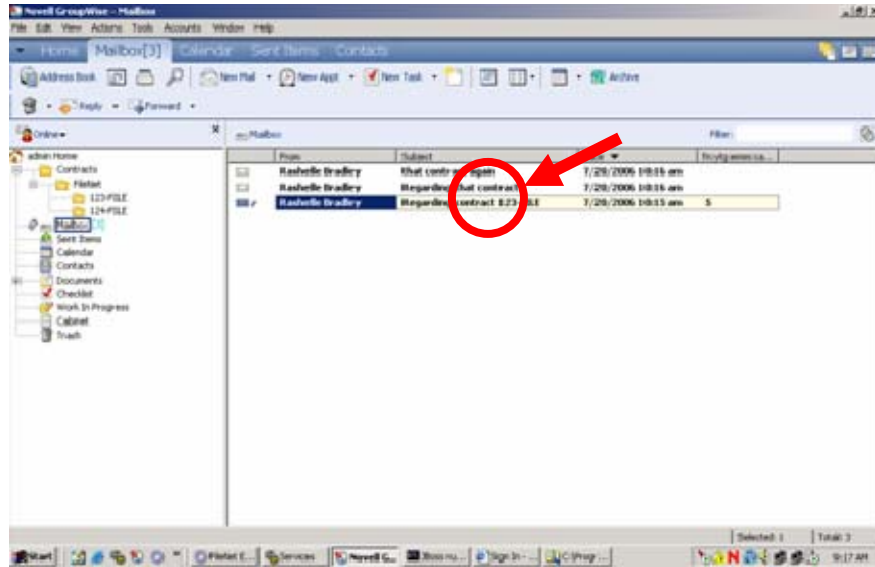


Figure 14: Email Manager indicator in GroupWise

Automatic Server-based Capture (Scheduled Monitoring)

Scheduled Mailbox Monitoring provides a method for email administrators to process existing email messages on an email server and add them to an IBM FileNet repository. This feature is useful for one-time back-file conversion and the ongoing filtering of old email to remove it from the email server once it has been archived in an IBM object store.

Administrators first define which users' folders they want to archive, the schedule (frequency) for monitoring the folders, and the business rules that determine which email messages should be captured.

Running as a Windows Service, Scheduled Mailbox Monitoring continuously monitors users' mailboxes looking for documents that match criteria defined by the Email Manager administrator. For instance, a policy could be set in place to archive all emails more than 90 days old. Global rules that apply to all messages on the email may be created or rules specific to mailboxes or folders may be created. A template that defines how the message should be indexed in IBM will be associated with each rule.

The option to delete an email after it has been captured is available in Email Manager for GroupWise, but due to the inability to modify email, the features to replace the email with a shortcut to the IBM FileNet repository, or to add email attachments to IBM as an attachment or a separate document, are not available as part of Scheduled Mailbox Monitoring.

Manual Capture using the Client Plug-in

Manual capture options are also available for emails that don't match any of the automatic business rules created by your organization, but that are nevertheless deemed to be of business value.

Manual capture may be used in conjunction with, or instead of, rules-based capture. Depending on the type of business, some organizations may prefer to use manual capture exclusively. This allows the end user to utilize the manual capture options to capture email on a case-by-case basis.

Manual capture may be used in conjunction with, or instead of, rules-based capture. Depending on the type of business, some organizations may prefer to use manual capture exclusively. This allows the end user to utilize the manual capture options to capture email on a case-by-case basis.

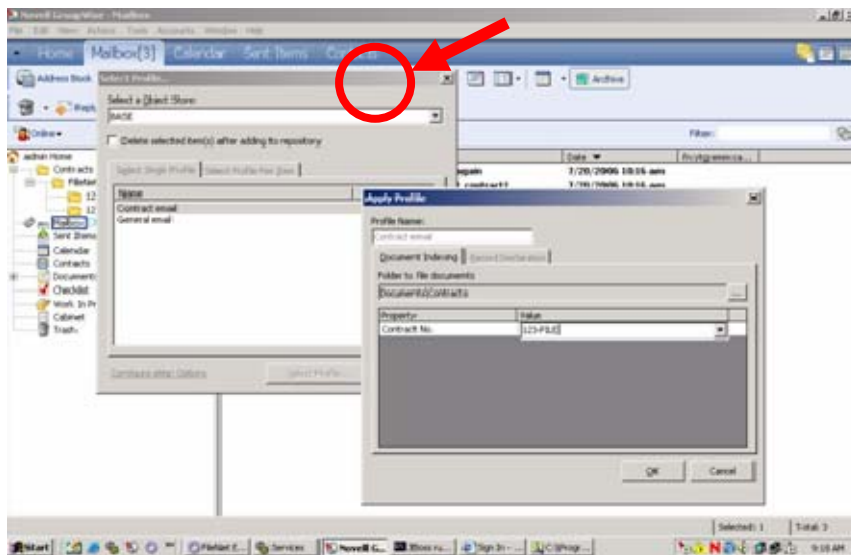


Figure 15: Capturing an email manually in GroupWise

To manually capture an email with the Email Manager client plug-in installed: Select "File" from the GroupWise menu options and then "Add to FileNet," or simply click on the "Capture" icon (see Figure 15) displayed on the GroupWise toolbar. The Email Manager Client user interface appears, and the user is prompted to select a profile index template to apply to the email(s).

This option provides more user control over what properties should be attributed to emails by giving users access to centralized Profile Index Templates. A profile index template is a template that indicates where and how an email is added to the IBM FileNet repository, and can be created either by the administrator or by users themselves. (The administrator ultimately retains control over whether users have permission to access and/or create profile index templates.)

Manual Capture using “Drag & Drop”

Email Manager for GroupWise can be configured to monitor mailboxes and process email that end users drag & drop into the mailbox. The most common use of drag & drop is to provide users with a simplified way of manually capturing email that fall into clearly identified categories (e.g. all email related to “contracts” can be dragged & dropped to a public folder titled “Contracts”). Users can simply “drag & drop” as many email as they like into monitored folders and Email Manager processes the email and puts it into IBM based on the profile assigned to the monitored public folder. Specified processing options are applied once the email is captured.

In GroupWise there is no concept of public folders, so each user must set up their own folders to which they will “drag & drop” email. However, the great benefit of “drag & drop” capture is that there is no client side integration or footprint, it is easy to roll-out to employees, and there is no need to manually index messages.

Message Shortcuts

Due to the inability of GroupWise messages to be modified, the feature to replace the body of an email with a shortcut to the email in IBM is not available for Email Manager for GroupWise. Similarly, attachments cannot be removed from email and replaced with a shortcut in the body of the email.

Attachments Handling

The attachments handling behavior is configured in IBM FileNet Email Manager profiles, and consequently, different “types” of emails can have their attachments handled differently. Attachments included in the captured email can be handled in two different ways:

- The email can be left intact (with attachments embedded in the email),
- The attachment can be separated completely from the email message and added to IBM. (Note that embedded attachments are fully indexed when the Verity search engine included with IBM FileNet Content Services 5.3/5.4 and IBM FileNet Content Manager is deployed.)

With GroupWise the recommend best practice is to break out attachments separate from the email. Due to the lack of a native file format in GroupWise, the best Email Manager can do if attachments are embedded in the original email is to take a binary of the attachments into P8. Consequently, P8 cannot content index attachments if they are embedded in an email (note that saving an email in P8 in .TXT format always separates out attachments).

GroupWise Viewer

As with Lotus Domino, GroupWise does not provide a native file format for GroupWise messages. GroupWise provides no facility for working with GroupWise messages once it is taken outside the GroupWise system and into an IBM FileNet repository. This will prevent trash folders from being emptied until a retention application, a type of trusted application, has a chance to process their contents. This feature may be implemented per account or domain. The performance impact is negligible, but disk space usage may be an issue. The system administrator will need to ensure Email Manager processes the items on a regular basis to allow processed email to be purged.

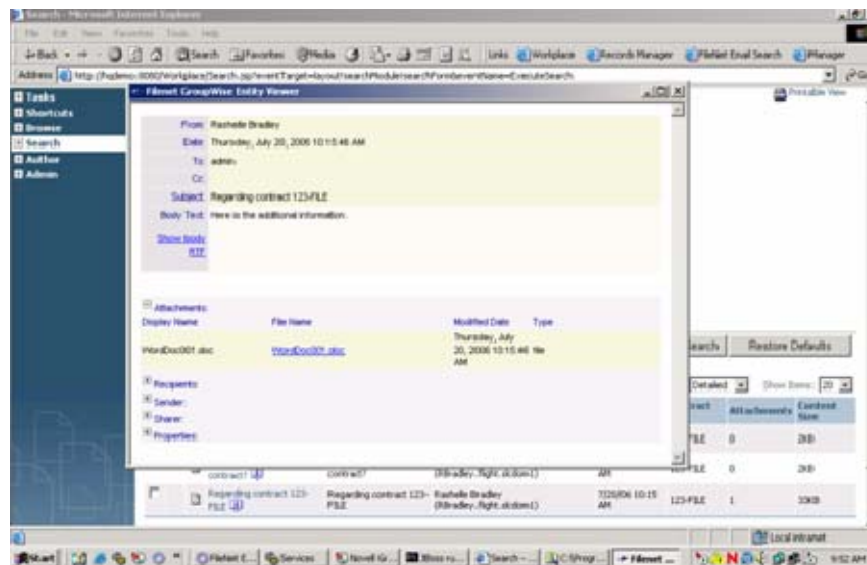


Figure 16: Viewing a GroupWise email from P8 using included viewer

To address this, Email Manager stores representations of GroupWise entities (email contents, metadata, and format information) as an XML representation.

Email Manager for GroupWise provides a viewer to enable users to open and review GroupWise email stored in IBM. The viewer is an HTML Application and uses XSLT to render the XML representation of a GroupWise entity as HTML or RFC 822.

The GroupWise Viewer does not provide a mechanism for importing the email back into GroupWise, nor the ability to forward or reply to an email.

Performance

No formal performance benchmarking is currently available for Email Manager for GroupWise. Benchmarking is currently scheduled to take place in the first half of 2007.

Based on the recommended server hardware requirements, a single instance of Email Manager for GroupWise can typically process approximately 2,000 emails per hour with processing options turned on (tagging all email as captured). This is provided as a guideline only. Hardware, network speed, co-location with other IBM applications, and content indexing can negatively impact Email Manager performance.

Technical Considerations

This information is for reference purposes only. It is strongly recommended that the latest product documentation and release notes be reviewed for comprehensive details on installation and configuration of Email Manager.

Technical Considerations

The following technical considerations are relevant to the implementation of Email Manager:

Three critical components are required for an IBM FileNet Email Manager implementation in a Microsoft Exchange environment:

- IBM FileNet Email Manager server, IBM FileNet Email Manager client (optional)
- Microsoft Exchange
- IBM FileNet repository (Content Services, Image Services, or Content Manager)

These components interact with each other to provide a complete solution for email capture and management.

Three critical components are required for an IBM FileNet Email Manager implementation in a Lotus Notes environment:

- IBM FileNet Email Manager server, IBM FileNet Email Manager client (optional)
- Lotus Notes
- IBM FileNet repository (Content Services, Image Services, or Content Manager)

These components interact with each other to provide a complete solution for email capture and management.

Three critical components are required for an IBM FileNet Email Manager implementation in a Novell GroupWise environment:

- IBM FileNet Email Manager server, IBM FileNet Email Manager client (optional)
- Novell GroupWise
- IBM FileNet repository (Content Services, Image Services, or Content Manager)

These components interact with each other to provide a complete solution for email capture and management.

Supported Environments

Email Manager functions with the following IBM document repositories:

- Records Manager 3.5.x
- IBM FileNet P8 Content Engine 3.0 and 3.5.x
- Image Services 3.6 and 4.0 (Note: some features available for P8 are not supported for IS)
- Content Services 5.3, and 5.4 (Note: some features available for P8 are not supported for CS)

Email Manager requires one of the following for Content Engine authentication:

- Microsoft Active Directory (AD)
- Novell eDirectory
- SunONE

Email Manager functions with the following email servers:

- Microsoft Exchange Server 2000 and 2003
- Lotus Domino 6.0.2 to 6.5.1, and 7.0.0 to 7.0.2
- Novell GroupWise 6.5 SP2 and above, and 7.0.x

Email Manager 3.7 functions with the following email clients:

- Microsoft Outlook 2000, 2002, and 2003
- Lotus Notes 6.0.2 to 6.5.1, and 7.0.0 to 7.0.2

Email Manager 3.7 functions with the following database servers:

- Microsoft SQL Server 2000 and 2005
- Oracle 9i, and 10g

Server Hardware Requirements

The following are the minimum hardware requirements for Email Manager:

- Pentium 4, 2.0 GHz
- 1 GB RAM
- 100 MB disk space

The following are the recommended hardware requirements for Email Manager:

- Pentium 4, 3.0+ GHz with HT
- 2 GB RAM
- 100 MB disk space

Server Software Requirements

The server on which Email Manager is to be installed requires the following software:

- Windows 2000 Pro, Windows 2000 Server, Windows XP Pro, or Windows 2003 Server
- .NET Framework 1.1
- If Email Manager Web Services will be used (required for Email Manager Client integration), one of:

- Internet Information Server (IIS) 5.0
- Internet Information Server (IIS) 6.0
- If Exchange Server is being used as the email server, one of:
 - Outlook 2000 w/ CDO
 - Outlook 2002 w/ CDO
 - Outlook 2003 w/ CDO
- If Lotus Domino is being used as the email server, one of:
 - Lotus Notes 6.0.2 to 6.5.1
 - Lotus Notes 7.0.0 to 7.0.2
 - Note: to support .DXL file and shortcut options, Lotus Notes 6.0.3 client or higher is required
- If Novell GroupWise is being used as the email server, one of:
 - Novell Open Enterprise Server (Netware or Linux version)
 - NetWare 5.1, NetWare 6.0, or Netware 6.5
 - SUSE LINUX Enterprise Server 9
- If Oracle is being used as the database server, one of:
 - Oracle 9i Client
 - Oracle 10g Client
- If IBM FileNet Content Services is being used as the document repository, one of:
 - Desktop 3.x and client libraries
 - Web 3.x and client libraries

- If IBM FileNet Image Services is being used as the document repository:
 - Web 3.x and client libraries
- If IBM FileNet P8 Content Engine is being used as the document repository:
 - Microsoft Active Directory (AD), or Novell eDirectory, or SunONE
 - IBM FileNet Content Engine COM SDK
 - IBM FileNet Client Connectivity
- If IBM FileNet Records Manager is being used:
 - Microsoft Active Directory (AD), or Novell eDirectory, or SunONE
 - Java Platform Standard Edition 1.4.2

Client Software Requirements

The following software must be installed on the client machine upon which Email Manager is installed:

- Windows 2000 Pro or Windows XP Pro
- If Exchange Server is being used as the email server, one of:
 - Outlook 2000
 - Outlook 2002
 - Outlook 2003
- If Lotus Domino is being used as the email server, one of:
 - Lotus Notes 6.0.2 to 6.5.1
 - Lotus Notes 7.0.0 to 7.0.2

Appendix – Configuration Options by Email Platform

These tables present the configuration options available for each email platform in Email Manager 3.7. Solid icons (●) indicate the option is included. Open icons (⊘) indicate the option is not available.

CONFIGURATION OPTIONS

General Settings

Field	Description	Exchange	Lotus	GroupWise
Temporary Files Folder	The file folder that temporary files created by the application should be written to. Click the "... " to select a folder.	●	●	●

Logging Settings

Field	Description	Exchange	Lotus	GroupWise
Log Type	Valid values are "Logging Disabled," which turns off logging and "Log To File," which will turn logging on. If "Log To File" is selected, a log file will be created for each system component.	●	●	●
Log Level	The type of data that should be written to the log file. Options available include: <ul style="list-style-type: none"> ● Fatal Errors: The minimum logging detail. An event is written to the log whenever a severe problem or critical condition occurs. ● All Errors: An event is written to the log whenever an error condition occurs—such as when a connection attempt to a server fails. ● Warnings: An event is written to the log whenever a warning condition occurs—such as when the server cannot understand a communication sent to it. ● Information: An event is written to the log with every significant action that takes place—such as when a document is captured. ● Trace: The most verbose logging. Useful only for debugging purposes. Events are written to the log at individual steps within each process or task, to pinpoint problems. 	●	●	●
Log File Location	The file folder that log files created by the application should be written to. Click the "... " to select a folder.	●	●	●

Log Retention Options

Field	Description	Exchange	Lotus	GroupWise
Enable log file retention	If selected, log files will be retained for the number of days specified.	●	●	●
Days to retain log files	The number of days to retain log files.	●	●	●
Enable audit log file retention	If selected, audit log files will be retained for the number of days specified.	●	●	●
Days to retain audit log files	The number of days to retain audit log files.	●	●	●

INDEX TEMPLATES**General Settings**

Field/Section	Description	Exchange	Lotus	GroupWise
Index Template Name	The name of the Index Template. The name must be unique.	●	●	●
Repository	The repository that documents should be added to. Only repositories that have been registered for use with Email Manager are available for use.	●	●	●
Repository Folder to Add Item	The folder on the selected Repository that email should be filed in. Selecting a folder is optional.	●	●	●
Declare as Record	If selected, the section Record Declaration will be enabled to allow record declaration options to be configured. This option is only available for P8 CE 3.0 repositories that have Records Manager installed.	●	●	●
For Client Use	If selected, the Index Template may be used within Client Profiles.	●	●	●
Prompt user with template	If selected, in the Email Manager Client, user will be prompted when the Client Profile is selected.	●	●	●
Share template with other users	If selected, users other than the user who created the template will have access to the template.	●	●	●

Property Mappings

Field/Section	Description	Exchange	Lotus	GroupWise
Document Class	The document class to use when capturing email. All document classes for the repository selected in the General Settings are listed.	●	●	●
Property Mappings	A list of Properties (including custom properties) configured for the Document Class selected. A "*" next to the name is used to indicate Properties that are mandatory. A value may be assigned to the property by double clicking next to property or click in the "add" icon. The Property Mapping Value screen will show to allow a value to be specified.	●	●	●

Property Mapping Value

Field/Section	Description	Exchange	Lotus	GroupWise
Document Property Value	Select a document property that should be mapped to the repository property. Only document properties that are compatible with the data type of the repository property are shown.	●	●	●
Literal Value	Enter or select a static value. Only values that match the data type of the repository property may be entered.	●	●	●
Calculated Value	A concatenation of email properties and static values.	●	●	●
Regular Expressions	A value may be extracted from a document property by applying a regular expression to the document property.	●	●	●

Edit Calculated Value

Field/Section	Description	Exchange	Lotus	GroupWise
Value	The type of value entered is dependent on the data type of the	●	●	●

Field/Section	Description	Exchange	Lotus	GroupWise
	<p>repository property the calculated value is being assigned to.</p> <p>For strings, a value may be one of:</p> <ul style="list-style-type: none"> • string value • document property <p>For numbers, a value may be a number value.</p> <p>For dates, a value may be:</p> <ul style="list-style-type: none"> • number value • date document property <p>For dates, one document property must be selected and one number value must be entered.</p>			
Operator	<p>The operator displayed is dependent on the data type of the repository property the calculated value is being assigned to.</p> <p>Strings:</p> <p>+ : will concatenate values together</p> <p>Numbers:</p> <p>+ : will add values together</p> <p>- : will subtract values</p> <p>* : will multiply values</p> <p>/ : will divide values</p> <p>Dates:</p> <p>+ Day: will add the number of days specified to the date property</p> <p>+ Month: will add the number of months specified to the date property</p> <p>+ Year: will add the number of years specified to the date property</p> <p>- Day: will subtract the number of days specified to the date property</p> <p>- Month: will subtract the number of months specified to the date property</p> <p>- Year: will subtract the number of years specified to the date property</p>	•	•	•

Edit Regular Expressions

Field/Section	Description	Exchange	Lotus	GroupWise
Document Property	The document property the regular expression should be applied to.	•	•	•
Default Value	In the case the regular expression entered does not match any text in the document property selected, the value entered in Default Value will be used.	•	•	•
Regular Expression	The regular expression to apply to the document property selected. Standard regular expression syntax may be used.	•	•	•
Validate	Click the Validate button to check whether the value entered in the Regular Expression field is valid.	•	•	•

Field/Section	Description	Exchange	Lotus	GroupWise
Test Value	Enter a test value to which the Regular Expression entered will be applied to when the Test button is clicked.	●	●	●
Test Result	The result of applying the Regular Expression entered to the Test Value entered.	●	●	●
Test	Click the Test button to apply the Regular Expression to the value entered in Test Value. The resulting match will appear in the Test Result field. If there is no match, the text "No Match" will appear.	●	●	●

Record Declaration

Field/Section	Description	Exchange	Lotus	GroupWise
File Plan Object Store	The file plan Object Store that the record should be declared in.	●	●	●
Record Class	The record class to use when declaring the record. Click the "..." button to select a record class.	●	●	●
Classification	The classification(s) that should be used when declaring a record. To add a classification, click the Add Classification button. To remove a classification, click the Remove Classification button.	●	●	●
Property Mappings	A list of Properties (including custom properties) configured for the record class selected. A "*" next to the name is used to indicate Properties that are mandatory. A value may be assigned to the property by double clicking next to property or click in the "add" icon. The Property Mapping Value screen will show to allow a value to be specified.	●	●	●

Permission Mappings**P8 Content Engine Permission Mappings**

Field/Section	Description	Exchange	Lotus	GroupWise
Security Grid	The Document Security grid shows all the access privileges that have been created. The grid shows the Type of the access privilege (either Email Property, User, or Group), the Name (either the email property name, user name, or group name) and the access level assigned. To edit an existing security setting, select the item and click the Edit button. To remove an existing security setting, select the item and click the Delete button.	●	●	●
Email Property/Users/Groups Radio Buttons	When adding Security privileges, select the item that the access privilege will be based on. Selecting Email Property will cause the Email Property combo box to show, which will be populated with a list of Email Properties that security settings can be derived from (To, From, and CC). Selecting Users will show search fields that will allow a domain user to be searched for. Selecting Groups will show search fields that will allow a domain group to be searched for.	●	●	●
Access Levels	The access level to assign to the item selected (either Email Property, Group, or User). For P8 Content Engine, valid access levels are: Owner Control,	●	●	●

Field/Section	Description	Exchange	Lotus	GroupWise
	Promote Version, Modify Content, Modify Properties, View Content, View Properties, Publish. A combination of these access levels may be selected for each user/group.			
Add	Click the Add button to add the selected item with the access level specified to the Security Grid.	●	●	●

Content Services Permission Mappings

Field/Section	Description	Exchange	Lotus	GroupWise
Document Security Grid	The Document Security grid shows all the access privileges that have been created. The grid shows the Type of the access privilege (either Email Property, User, or Group), the Name (either the email property name, user name, or group name) and the access level assigned (either None, Viewer, Author, Owner, or Admin). To edit an existing security setting, select the item and click the Edit button. To remove an existing security setting, select the item and click the Delete button.	●	●	●
Email Property/Users/Groups Radio Buttons	When adding Security privileges, select the item that the access privilege will be based on. Selecting Email Property will populate the Name combo box with a list of Email Properties that security settings can be derived from (To, From, and CC). Selecting Users will populate the Name list box with a list of document repository Users. Selecting Groups will populate the Name list box with a list of document repository Groups.	●	●	●
Access Level	The access level to assign to the item selected in the Name combo box. For IBM FileNet Content Services, valid access levels are: None, Viewer, Author, Owner, or Admin. Only one of these access levels may be selected for each user/group.	●	●	●
Add	Click the Add button to add the selected item with the access level specified to the Security Grid.	●	●	●

Image Services Permission Mappings

Field/Section	Description	Exchange	Lotus	GroupWise
Read	The user or group "Read" permissions should be assigned to. Click the "..." to select a user or group.	●	●	●
Write	The user or group "Write" permissions should be assigned to. Click the "..." to select a user or group.	●	●	●
Execute	The user or group "Execute" permissions should be assigned to. Click the "..." to select a user or group.	●	●	●

RULES**Rule**

Field/Section	Description	Exchange	Lotus	GroupWise
Rule Name	The name of the rule. The Rule Name will default to "New Rule." Change the name to something more descriptive that indicates what the rule is for. For example, if a rule is being created to capture email from a company called "Acme," name the rule "Acme Rule." The Rule Name is a mandatory field.	●	●	●
Return Value	The value that should be returned by the rule (for use by the Index Template) if the rule is true. The value may be a static value (static text up to 255 characters in length) or the value may be determined by the rule clause. If the value is determined by the rule clause, the value is based on the value in the first clause that is true. The clause value is dependent on the type of the clause value. If the value is a text value, the clause value is the text value. If the value is an expression, the clause value is the result of applying the expression to the document property used in the clause. If the value is a list, the clause is the return value of the first item in the list that matches the document property value.	●	●	●
Rules Always True	Selecting this option will cause the rule to always be true. If this option is selected, clauses cannot be entered.	●	●	●

SOURCE SERVERS**General Settings**

Field/Section	Description	Exchange	Lotus	GroupWise
Enable Notifications	Specifies whether an Exchange Server should send Email Manager notifications of new email messages. This option is only available for Exchange Server and is disabled for Lotus Notes.	●	⊘	⊘
Polling Interval	The number of seconds that Email Manager should wait before polling the email server for new data. For Exchange Server, if Enable Notifications is selected, in most cases email will be captured via notifications, but for those emails that do not trigger a notification, the polling interval is utilized.	●	●	●
Ignore System Messages	This option is only available for Lotus Domino Servers. If this option is selected, systems messages, such as auto reply, trace, delivery and read receipts, will be ignored when Email Manager is processing email on the email server. This includes items of the following class: "Delivery Report," "NonDelivery Report," "Return Receipt," "ReturnNonReceipt," "Trace Report," "Tracking Response," "Quota Report," "Mail Router."	⊘	●	⊘
Ignore Read Receipts	If this option is selected, read receipts will be ignored when Email Manager is processing email on the email server. This option is only available for Exchange Servers.	●	⊘	⊘
Attachment Name Prefix	The prefix that will be used for attachment names and files.	●	●	●
Lotus Connection Password	The password that should be used by the user that the Lotus Connector is configured for, to connect to the Lotus Domino server.	⊘	●	⊘
Save Email in Unicode Format (Outlook 2003 only)	If selected, email will be saved in Unicode format. This option is only available for Exchange Server with Outlook 2003. Note that any email saved in Unicode format will not be readable in older versions of	●	⊘	⊘

Field/Section	Description	Exchange	Lotus	GroupWise
	Outlook (Outlook 2000 and Outlook 2002).			
Resolve addresses in distribution list	If selected, for distribution lists specified in an email recipient list (To/From/CC fields), the members of the distribution list will be resolved and added to the recipient metadata. If this option is not selected, the distribution list will not be resolved and the name of list will appear in the recipient metadata.	●	●	⊖
Email Shortcut Text	The descriptive text that will be added to an email on the email server when a shortcut is created to a captured email.	●	●	⊖
Attachment Shortcut Text	The descriptive text that will be added to an email on the email server when a shortcut is created to a captured attachment.	●	●	⊖
Blank Subject Line Text	When an email is captured, the text that will be used for the email subject line if the subject line is blank.	●	●	●

Advanced Options

Field/Section	Description	Exchange	Lotus	GroupWise
Enable Notifications	Specifies whether an Exchange Server should send Email Manager notifications of new email messages. This option is only available for Exchange Server and is disabled for Lotus Notes.	●	⊖	⊖
Processing threads	The number of concurrent items that should be processed. Increasing this value will require more system resources to be used. Decreasing this value will reduce system efficiency as the full capacity of the hardware and dependent systems will not be utilized.	●	⊖	●
Processing queue size	The number of items that are queued for processing. It is recommended this value be set to the same value assigned to Processing threads.	●	⊖	●
Save plain text email with formatting	If selected, when saving email in plain text format, it will be generated as a multi-part MIME message with an HTML body. This is equivalent to the EML format utilized by Microsoft Outlook Web Access.	●	⊖	⊖
Generate plain text shortcuts	If selected, if shortcuts are added to an email, the email will be converted to plain text format. This option must be enabled under certain conditions when using Outlook 2000 on client desktops.	●	⊖	⊖
Reduced MSG file size	If selected, the size of an MSG file created by the Exchange Connector will be reduced by removing redundant copies of the email body from the file. By default, all MSG files include the plain text, HTML, and RTF versions of the email body. The Reduce MSG File Size option will only include the email body format that the email sender originally used. By selecting this flag, the option to switch the format of the email in Outlook will no longer be available.	●	⊖	⊖
Save metadata to folder	If selected, metadata associated with an email item will be written to the Email Manager temporary location folder. The temporary location is defined in the Configuration Options screen.	●	⊖	●
Enable extended trace logging	If selected and the system Log Level is set to "Trace," an extended form of trace logging will be enabled. This option should only be enabled for troubleshooting purposes as the log files produced will be extremely large.	●	⊖	●
Save Email in Unicode Format (Outlook 2003 only)	If selected, email will be saved in Unicode format. This option is only available for Exchange Server with Outlook 2003. Note that any email saved in Unicode format will not be readable in older versions of Outlook (Outlook 2000 and Outlook 2002).	●	⊖	⊖

Field/Section	Description	Exchange	Lotus	GroupWise
Processing Threads	The maximum number of concurrent items that can be processed by the system. Each thread requires a connection to Lotus Notes and uses memory and system resources.	⊗	●	⊗
Processing queue wait threshold	If the number of items in the processing queue exceeds the value entered, the Lotus Connector will not add additional items to the queue until the number of items in the queue is below the threshold value. This functionality is only available when the "Do not crawl if queue size over threshold" is selected.	⊗	●	⊗
Do not crawl if queue size over threshold	If this option is selected, when the next polling interval or scheduled run time for the Lotus Connector occurs, it will not attempt to query the monitored locations for more items if the number of items currently queued for processing exceeds the "Processing queue wait threshold." This option may be used to prevent the Lotus Connector from executing queries while the queue contains a backlog of items that are waiting for processing, therefore helping to improve overall performance of the system. This option is enabled by default.	⊗	●	⊗
Cache Server	The Lotus Connector cache database is usually co-located with the Lotus Connector but it can be managed by a Domino server. Leave blank if the cache database is stored locally, or specify the Domino server name where the cache database is located.	⊗	●	⊗
Cache Database Path	The location of the cached database on the Cache Server. i.e. Folder\dbname.nsf. The default location is: eMgnlCache.nsf. The Lotus Connector cache database is used as temporary workspace when creating shortcut links, removing attachments, and truncating messages. It also stores temporary diagnostic information and information on items that cause errors during processing. The database may be used when troubleshooting issues with the Lotus Connector.	⊗	●	⊗
Use Public Address Book	If selected, the Public address book will be used to resolve data in email recipient fields. This option is selected by default.	⊗	●	⊗
Use Private Address Book	If selected, the Private address book will be used to resolve data in email recipient fields. Use the private address book in conjunction with the public address book if there is a need to control how specific addresses are resolved (the private address book takes precedence). Use just the private address book if there is a need to resolve a subset of the addresses in the public address book (e.g. in a departmental deployment).	⊗	●	⊗
Address Security Property	When using email recipients to set security on items in a document repository, the value in the Lotus item property entered will be used to represent the IDs of document repository users. The default property is "ShortName." Consult Lotus Domino documentation for details on other properties available for an item in a Domino database.	⊗	●	⊗
Icon Change Mode	When updating the icon on an item in a database to indicate whether an item has been captured, two options for the icon that is used are available (both may be used).	⊗	●	⊗
Icon Number	If "Notes mail icon column" is selected, the number of the icon that will be used to indicate an item has been captured. The default value corresponds to the default "archive" indicator in Lotus Notes. Consult Lotus Notes Designer documentation for a list of available icons and associated icon numbers.	⊗	●	⊗
Crawler View (Profile)	Specifies a custom view that should be used when crawling a database if the profile does not specify monitored sub-locations. If this value is blank or the specified view is not available, the crawler will locate documents using a select condition.	⊗	●	⊗

Field/Section	Description	Exchange	Lotus	GroupWise
Crawler View (Client Database)	Specifies a custom view that should be used when processing items queued for capture using the Email Manager Client. If this value is blank or the specified view is not available, the client crawler will locate documents using a select condition.	⊘	●	⊘
Enable Client Capture	If selected, support for Email Manager Client capture is enabled. This option can be disabled if the Email Manager Client is not deployed. Otherwise, it should only be used to temporarily disable client capture for troubleshooting purposes.	⊘	●	⊘
Save Metadata To Folder	If selected, metadata associated with an email item will be written to the folder specified in Save Metadata Path. This option should only be enabled for troubleshooting purposes.	⊘	●	⊘
Save Metadata Path	If selected, metadata associated with an email item will be written to the folder specified in Save Metadata Path as an XML file. This option should only be enabled for troubleshooting purposes.	⊘	●	⊘
Delete Exported Files	If selected, temporary files created by the Lotus Connector (the exported version of emails and attachments) will be deleted. This option is enabled by default. The option should only be disabled for troubleshooting purposes.	⊘	●	⊘
Cache Cleanup Mode	After an item is processed by the Lotus Connector, the temporary diagnostic information in the cache database may either be deleted, compacted (left in the database but reduced in size), or left as is. This option should be set to "Delete," except for troubleshooting purposes.	⊘	●	⊘
Enable extended trace logging	If selected and the system wide Log Level is set to "Trace," an extended form of trace logging will be enabled. This option should only be enabled for troubleshooting purposes as the log files produced will be extremely large.	⊘	●	⊘

Processing Options/Captured Items

Deletion Options

Field/Section	Description	Exchange	Lotus	GroupWise
Delete email from capture location	If selected, the email will be deleted from the email server in the location that the Email Connector found the email.	●	●	●
Delete email from mailboxes of all recipients	If selected, the email will be deleted from the mailboxes of all users the email was sent to. If this option is selected, the rest of the processing options will not be applied.	●	●	●
Leave email in capture location	If selected, the email will not be deleted from the location the Email Connector found the email.	●	●	●

Notification Options

Field/Section	Description	Exchange	Lotus	GroupWise
Change icon in capture location	<p>If selected, the icon will be changed for the email on the email server in the location that the Email Connector found the email.</p> <p>For Exchange Server, an organizational form must be deployed to support the icon change in user mailboxes.</p> <p>For Lotus Notes, the default Lotus Notes "archive" indicator will be used. Customized Lotus Notes mail templates must be deployed to support customized icons.</p>	●	●	⊘

Field/Section	Description	Exchange	Lotus	GroupWise
Change icon in mailboxes of all recipients	If selected, the icon will be changed for the email in the mailboxes of all users the email was sent to.	●	●	⊗
Mark email in capture location as captured	If selected, the email on the email server in the location that the Email Connector found the email will be marked as "captured." If an email is marked as "captured," it may be processed again at a later date. The "Item Already Captured" option in rules may be used to determine whether an email should be captured again.	●	●	●
Mark email in mailboxes of all recipients as captured	If selected, the email will be marked as "captured" in the mailboxes of all users the email was sent to.	●	●	⊗

Attachment Options

Field/Section	Description	Exchange	Lotus	GroupWise
Remove attachments from email in capture location	If selected, attachments will be removed from the email on the email server in the location that the Email Connector found the email.	●	●	⊗
Remove attachments from email in mailboxes of all recipients	If selected, attachments will be removed from the email in the mailboxes of all users the email was sent to.	●	●	⊗

Shortcut Options

Field/Section	Description	Exchange	Lotus	GroupWise
Enable shortcuts for email in capture location	If selected, shortcut options will be enabled for email on the email server in the location that the Email Connector found the email. The shortcut consists of a URL link to a document in the document repository.	●	●	⊗
Enable shortcuts for email in mailboxes of all recipients	If selected, shortcut options will be enabled for email in the mailboxes of all users the email was sent to.	●	●	⊗
Shortcut location in email	Specifies where, relative to the email body, the shortcut should be placed. Valid options are: <ul style="list-style-type: none"> • After Body • Before Body 	●	●	⊗
Add shortcut to captured email in document repository	If selected, a shortcut to the copy of the email in the document repository will be created in the email on the email server.	●	●	⊗
Leave Email Body	If selected, the email body will be left intact when adding shortcuts.	●	●	⊗
Remove Email Body	If selected, the email body will be removed completely when adding shortcuts.	●	●	⊗
Number of characters in body to leave	If selected, the number of characters specified will be left in the email body when adding shortcuts. Note that if this option is selected, the email format for the remaining text will be changed to plain text.	●	●	⊗

Processing Options/Items Not Captured

Field/Section	Description	Exchange	Lotus	GroupWise
Delete email in monitored location	If selected, the email will be deleted from the email server in the location that the Email Connector found the email.	●	●	●
Delete email from mailboxes of all recipients	If selected, the email will be deleted from the mailboxes of all users the email was sent to.	●	●	⊙
Leave email in capture location	If selected, the email will not be deleted from the location the Email Connector found the email.	●	●	●

Processing Options/Error Item Options

Field/Section	Description	Exchange	Lotus	GroupWise
Move email to default location	If selected, the email will be moved to the default location within the email server.	●	●	●
Move email to error location on file system	If selected, the email will be moved to the location specified on the file system. This option will only apply if the Email Connector is able to create an email file. If the Email Connector is not able to create an email file, the email will be moved to a default location within the email server.	●	●	●

Scheduling Options

Field/Section	Description	Exchange	Lotus	GroupWise
This profile should run	<p>Specifies type of schedule. Based on the type of schedule selected, different options will appear on the screen. Values that may be selected include:</p> <ul style="list-style-type: none"> Always: the scheduled profile will run continuously. Once: the scheduled profile will run only once. Daily: the scheduled profile will run on a daily basis at a specific time. Interval: the scheduled profile will run at a specific time interval. Weekly: the scheduled profile will run on a weekly basis at a specific time. Monthly: the scheduled profile will run on a monthly basis at a specific time. 	●	●	●

Run "Once" Options

Field/Section	Description	Exchange	Lotus	GroupWise
Run On	Select the date the profile should run. By default, the date is set to today's date.	●	●	●
Run Period	The time the profile should start running and how long the task should run for.	●	●	●

Run "Daily" Options

Field/Section	Description	Exchange	Lotus	GroupWise
Run Period	The time the profile should start running and how long the task should run for.	●	●	●

Run at "Interval" Options

Field/Section	Description	Exchange	Lotus	GroupWise
Schedule Interval	Number of seconds/minutes/hours/days between each run of the profile.	●	●	●

Run "Weekly" Options

Field/Section	Description	Exchange	Lotus	GroupWise
Schedule Weekly	The days of the week the profile should run.	●	●	●
Run Period	The time the profile should start running and how long the task should run for.	●	●	●

Run "Monthly" Options

Field/Section	Description	Exchange	Lotus	GroupWise
Schedule Monthly	The days of the month the profile should run.	●	●	●
Run Period	The time the profile should start running and how long the task should run for.	●	●	●

Audit Log Settings

Field/Section	Description	Exchange	Lotus	GroupWise
Enable audit logging	If selected, audit logging will be enabled.	●	●	●
Folder to save audit logs to	The folder on the file system that audit logs will be created in.	●	●	●
Create new audit log for each profile	If selected, an audit log file will be created for each profile.	●	●	●
Maximum file size (kilobytes)	The maximum size that an audit log file should grow to before a new file is created.	●	●	●

Field/Section	Description	Exchange	Lotus	GroupWise
Metadata to include in the audit log	In addition to default fields that are always included in the audit log, additional email metadata fields may be added to the audit log by selecting a field in the list and clicking the "->" button. To remove a field from the Selected Fields list, select the field and click the "<-" button.	●	●	●

Duplicate Management

Field/Section	Description	Exchange	Lotus	GroupWise
Enable duplicate management	If selected, duplicate management will be enabled for the email connector.	●	●	●
Use default system database for duplicate detection	If selected, the current Email Manager database will be used to track duplicate items.	●	●	●
Use another database for duplicate detection	If selected, the database of another instance of Email Manager will be used to track duplicate items. The alternate duplicate database must belong to another Email Manager instance. To select the alternate database, click the "..." button.	●	●	●
Duplicate database purge interval	The number of days that data for captured items should be retained in the database. The default setting is "0", which will cause the system to never purge records from the database.	●	●	●
Metadata to use for duplicate detection	A list of email metadata that will be used to identify duplicates. Additional email metadata fields may be added to the Selected Fields by selecting a field in the list and clicking the "->" button. To remove a field from the Selected Fields list, select the field and click the "<-" button.	●	●	●

Source Server Instance

Field/Section	Description	Exchange	Lotus	GroupWise
Exchange Server Name	The name of the Exchange Server.	●	⊗	⊗
Public Folder for Client	The name of the public folder that will be used by the Email Manager Client to temporarily store email. If the public folder is a subfolder of another folder, use a "/" to separate the folder names. It is assumed the public folder is created under the folders <code>Public Folders/All Public Folders</code> , and therefore the <code>Public Folders/All Public Folders</code> should not be included in the path. i.e. If the client public folder is created in the location: <code>Public Folders/All Public Folders/eMgr/Client</code> in the field enter: <code>eMgr/Client</code>	●	⊗	⊗
Domino Server Name	The name of the Domino server.	⊗	●	⊗
Database for Client	The database that will be used by the Email Manager Client to temporarily store email. The database must be created on the server and may optionally use the Email Manager Client database template contained in the installation package. The database name must be a path to the database, relative to the root folder of the Domino server. i.e. if the database is stored in: <code>C:\Lotus\Domino\Data\eMgr\eMgrclient.nsf</code>	⊗	●	⊗

Field/Section	Description	Exchange	Lotus	GroupWise
	<p>in the field enter eMgr\Mgrclient.nsf</p> <p>To ensure the Email Manager Client is able to find the Client Database location, the Domino Server Name configured must match the server name configured in the Notes INI file on the end user desktops the Email Manager Client is installed on. It is assumed that the Client Database is on the same server as the server specified in the Notes INI file.</p> <p>Optionally, registry keys may be set on end user machines to specify the Domino Server name and client database location that should be used by the Email Manager Client.</p>			

PROFILES

General Settings

Field/Section	Description	Exchange	Lotus	GroupWise
Profile Name	<p>The name of the Profile. Give the profile a descriptive name that indicates what the Profile is for.</p> <p>The Profile Name is a mandatory field.</p>	●	●	●
Profile Type	<p>Specifies the type of the Profile. Profile types include:</p> <ul style="list-style-type: none"> Client Profile: the profile is for Email Manager Client use Scheduled Profile: the profile operates in scheduled mode Active Profile: the profile operates in monitoring mode 	●	●	●
Capture Email	If selected, the profile will add email files to the document repository.	●	●	●
MSG/DXL File	If selected, email files will be created in MSG file format for Exchange email or DXL file format for Lotus Domino email.	●	●	●
Plain Text	If selected, email files will be created in plain text format.	●	●	●
File Extension	The file extension to use for plain text email files.	●	●	●
Capture attachments as individual files	If selected, attachments will be added as separate files to the document repository.	●	●	●
Check for duplicates	If selected, duplicate checking will be enabled for the profile. This option will only be available if duplicate detection is enabled in the Email Connector configuration screen.	●	●	●
Do not capture duplicated and do not apply processing options	If selected, duplicates will not be captured and processing options will not be applied.	●	●	●
Do not capture duplicated but apply processing options	If selected, duplicates will not be captured, but processing options defined in the profile may be applied.	●	●	●
Capture Duplicates	If selected, duplicates will be identified and logged but will still be captured.	●	●	●

Monitored Locations

Field/Section	Description	Exchange	Lotus	GroupWise
Email Server	The email server that the profile should connect to. Only email servers that have been registered for use with Email Manager will be available	●	●	●

Field/Section	Description	Exchange	Lotus	GroupWise
	for selected.			
Ignore items already processed by current profile	If selected, items that have already been processed by the current profile will not be processed again the profile.	●	●	●
Ignore items already processed by other profiles	If selected, items that have already been processed by any profile will not be processed again the profile.	●	●	●
Ignore items already captured	If selected, items that have already been captured will not be processed again by the profile. For this option to function, in the processing options for Capture Items, the flag "Mark email in captured location as captured" must be selected.	●	●	●
Ignore items where access is denied	If selected, items that cannot be accessed will be ignored. An error will not be logged for these items.	●	●	●
Monitor all mailboxes	If selected, all mailboxes on the selected email server will be monitored. This option is only available for Scheduled Profiles.	●	●	⊗
Monitored Locations	A list of locations on the email server that Email Manager should monitor.	●	●	●
Monitored Sub-Locations	A list of sub-locations of the Monitored Locations entered to either include or exclude from monitoring. The list applies to all Monitored Locations entered that have the Monitor Sub-Locations option selected. This section is only available for Scheduled Profiles. If locations to include are entered, only those locations in the list will be monitored. If locations to exclude are entered, all locations except those entered in the list will be included for monitoring.	●	●	●

Edit Monitored Location

Field/Section	Description	Exchange	Lotus	GroupWise
Location	The location to monitor.	●	●	●
Monitored Location Type	For Exchange, the following location types are supported: <ul style="list-style-type: none"> ● Public Folder ● Mailbox For Lotus Domino, the following location types are supported: <ul style="list-style-type: none"> ● Mailbox ● Lotus Database ● Lotus Template 	●	●	●
Monitor Sub-Locations	If selected, sub-locations of the Location specified will also be monitored. Otherwise, only the "root" of the location will be monitored.	●	●	●
Folder Depth	If sub-locations are being monitored, the folder depth specifies how many levels of sub-locations Email Manager should monitor.	●	●	●

Rules/Index Templates

Field/Section	Description	Exchange	Lotus	GroupWise
Rule/Index Template Mappings	This section contains a list of rules that should be applied to the Monitored Locations and what Index Template should be used to capture an email if a specific rule applies. To add a new mapping, click the "Add" button. To edit an existing mapping, click the "Edit" button. To remove a mapping, click the "Delete" button. To change the order in which the rules are applied, select a mapping and click the "Move Up" or "Move Down" buttons.	●	●	●
Do not capture email	If selected, if none of the rules apply, the email will not be captured.	●	●	●
Capture email using this template	If selected, if none of the rules apply, the email will be captured using the index template selected.	●	●	●

Processing Options

Field/Section	Description	Exchange	Lotus	GroupWise
Active Profiles (server)	Email Manager will monitor one or more designated locations and process all email that are placed in the location. The location may be a journal folder populated by the email server, or a folder in the email system into which email are placed (e.g. drag & drop).	●	●	●
Scheduled Profiles (server)	Email Manager will "crawl" the email system and apply rules against email currently located in user and shared email folders/databases/postoffice.	●	●	●
Manual Capture (client)	Email Manager client plug-in that enables users to manually capture an email and define which profile is to be used to capture it at the time of capture.	●	●	●

CLIENT SETTINGS

Configuration Setting	Field	Exchange	Lotus	GroupWise
Config: General: Default IBM group to last group selected	If enabled, the IBM groups will default to the last IBM group that was selected.	●	●	●
Config: General: Default IBM login to last login used	If enabled, the IBM login will default to the last IBM login that was used.	●	●	●
Config: General: Default IBM login to NT user	If enabled, the IBM login will default to the current Windows user.	●	●	●
Config: General: If only one library, immediately show login screen	If selected, if only one repository is configured for use, the login screen will be shown immediately to allow the user to login to the repository specified.	●	●	●
Config: General: Must Select a Repository Folder	Specifies whether selecting an IBM folder is mandatory.	●	●	●
Config: General: Remember last setting for 'delete after add' flag	If selected, the last setting used for the 'delete after add flag' will be used the next time the screen is opened.	●	●	●
Config: Security: Default Add By Group Security	Default security to assign to the group adding email to IBM.	●	●	●
Config: Security: Default Add By User Security	Default security to assign to the user who is adding email to IBM.	●	●	●

Configuration Setting	Field	Exchange	Lotus	GroupWise
Config: Security: Force IBM Access Level	Specifies whether or not a default access level should be assigned to items that appear in the Document Security Grid. If this option is enabled, all access levels will be set to the setting specified in the default value.	●	●	●
Config: Security: Only downgrade IBM access levels	If this option is selected, security level in the Profile security will only be downgraded and not upgraded. The value specified in the "Config: Security: Force FileNet Access Level" option will only apply to security settings that are higher than the specified security settings.	●	●	●
Config: Security: Use DIAL	Specifies whether the DIAL for the user should be merged into the security settings.	●	●	●
Config: Security: Use IBM Security	Enabling this setting will base profile access on the IBM user who created the profile. If this setting is not enabled, profile access will be based on the NT user.	●	●	●
Screen: eMgr Config: Select default profile.	Specifies whether or not the "Select default profile" option is available.	●	●	●
Screen: Profile: Add Item To Folder	Specifies whether "Add Item To" button is enabled.	●	●	●
Screen: Profile: Capture Attachments	Specifies whether "Archive Attachments" checkbox is enabled.	●	●	●
Screen: Profile: Capture Email	Specifies whether the "Capture Email" option is enabled.	●	●	●
Screen: Profile: Document Security	Specifies whether the "Document Security" section of the screen is enabled.	●	●	●
Screen: Profile: Edit Email Format	Specifies whether the "Edit Email Format" option is enabled.	●	●	●
Screen: Profile: Edit Profile	Specifies whether "Edit Profile" button is enabled.	●	●	●
Screen: Profile: Edit Shortcuts	Specifies whether the "Edit Shortcuts" option is enabled.	●	●	⊘
Screen: Profile: Enable Shortcuts	Specifies whether the "Enable Shortcuts" option is enabled.	●	●	⊘
Screen: Profile: Expand Security Area	Specifies whether the "Security" section of screen is shown by default.	●	●	●
Screen: Profile: Index Email	Specifies whether the "Index" checkbox is enabled.	●	●	●
Screen: Profile: Profile Access Security	Specifies whether the "Profile Access Security" section is enabled.	●	●	●
Screen: Profile: Prompt with Profile	Specifies whether "Always show profile before archiving" checkbox is enabled.	●	●	●
Screen: Profile: Property Mapping table	Specifies whether the "Property Mapping" grid is enabled.	●	●	●
Screen: Profile: Record Declaration Tab	Specifies whether the Record Declaration tab is enabled.	●	●	●
Screen: Profile: RM Classifications	Specifies whether the Record Declaration Classifications selection is enabled.	●	●	●
Screen: Profile: RM Object Store	Specifies whether the Record Declaration Object Store selection is enabled.	●	●	●
Screen: Profile: RM Property Mapping table	Specifies whether the Record Declaration Property Mappings section is enabled.	●	●	●

Configuration Setting	Field	Exchange	Lotus	GroupWise
Screen: Profile: RM Record Class	Specifies whether the Record Declaration Record Class combo box is enabled.	●	●	●
Screen: Profile: Security: Email Properties Option	Specifies whether the "Assign Security to Email Property" radio button is enabled.	●	●	●
Screen: Profile: Security: Groups Option	Specifies whether the "Assign Security to Group" radio button is enabled.	●	●	●
Screen: Profile: Security: Users Option	Specifies whether the "Assign Security to User" radio button is enabled.	●	●	●
Screen: Profile: Select Doc Class for Profiles	Specifies whether "Class" combo-box is enabled.	●	●	●
Screen: Profile: Separate Attachments	Specifies whether the "Separate Attachments" checkbox is enabled.	●	●	⊙
Screen: Profile: Share Profile With Other Users	Specifies whether the "Share Profile With Other Users" checkbox is enabled.	●	●	●
Screen: Select Profile: Copy Profile	Specifies whether the "Duplicate Profile" button is enabled.	●	●	●
Screen: Select Profile: Create Profile	Specifies whether the "Create Profile" button is enabled.	●	●	●
Screen: Select Profile: Delete After Add	Specifies whether the "Delete Item after Adding" checkbox is enabled.	●	●	●
Screen: Select Profile: Edit/Create Profiles	Specifies whether the "Edit/Create Profile" option on the Select Profile screen is enabled.	●	●	●
Screen: Select Profile: Remove Profile	Specifies whether the "Remove Profile" button is enabled.	●	●	●



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