



**Workshare Protect Server**  
**Autonomy EMM**  
Technical Note

## Company Information

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Workshare Protect Server Autonomy EMM Tech Note

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## Introduction

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Autonomy WorkSite 8.5 Communications Server is a major release with a number of new features. These new features can impact the expected behavior of the Workshare Protect Server Exchange Plugin. Workshare has performed a number of tests to demonstrate the expected behavior of these systems working together.

## Systems Used in Verification

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- Autonomy WorkSite 8.5
- Autonomy WorkSite 8.5 Communications Server
- Autonomy WorkSite 8.2
- Autonomy WorkSite 8.2 Communications Server
- Microsoft Exchange Server 2010
- Workshare Protect Server 2.1
- Workshare Protect Server Exchange Plugin

## Scenarios Tested

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Four scenarios were tested with Workshare Protect Server and Autonomy WorkSite Communications Server. In particular, attention was focussed on how the Workshare Protect Server Exchange Plugin and the synchronization feature might be impacted with Autonomy WorkSite Communications Server.

## Background

With Autonomy WorkSite Communications Server (WCS) versions 8.2 and 8.5, email management is based on the Microsoft virtual SMTP service which is configured to receive all inbound and external email sent to a company. A copy of each message is stored in the “drop” folder on the WCS and ultimately profiled and stored in the WorkSite Document Management System.

Additionally the WorkSite Communication Server 8.5 Email Management Module (EMM) offers new “manual filing” functionality so that users can drag emails into folders in Microsoft Outlook and have the files synchronised to the WorkSite Document Management System.

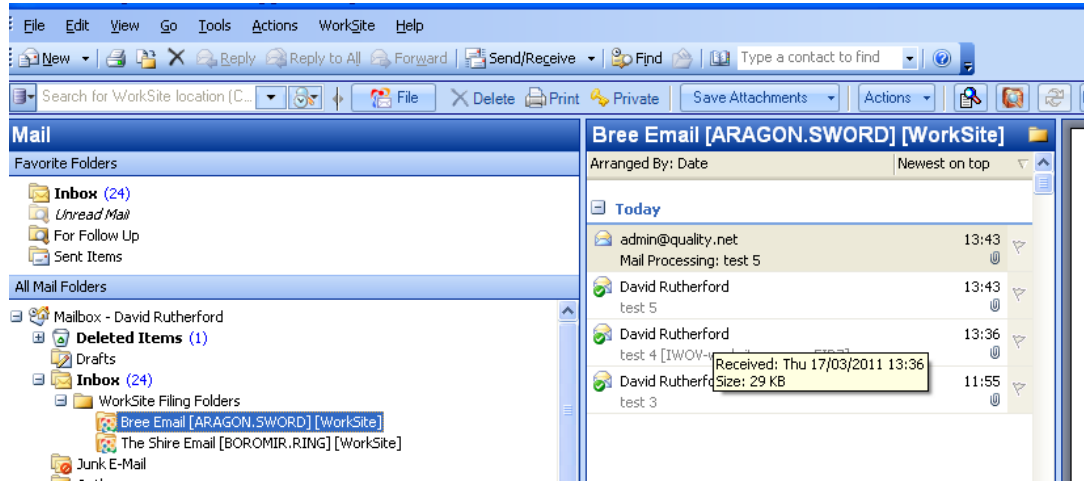
No components of the WorkSite Communications Server are installed on the Exchange Server and the usual Autonomy FileSite or DeskSite desktop components are installed on the client computer.

The interaction between a user’s email and Autonomy WorkSite 8.5 Communication Server is controlled in two ways:

1. Manual filing
2. Send and file

## Manual Filing

A user may move email from any folder in their mailbox to a WorkSite “Filing Folder” – any emails are then synchronized into the Autonomy WorkSite system. The filing folder exists in Microsoft Outlook and if an email is selected for filing, by drag and drop for example, it is removed from its original folder.



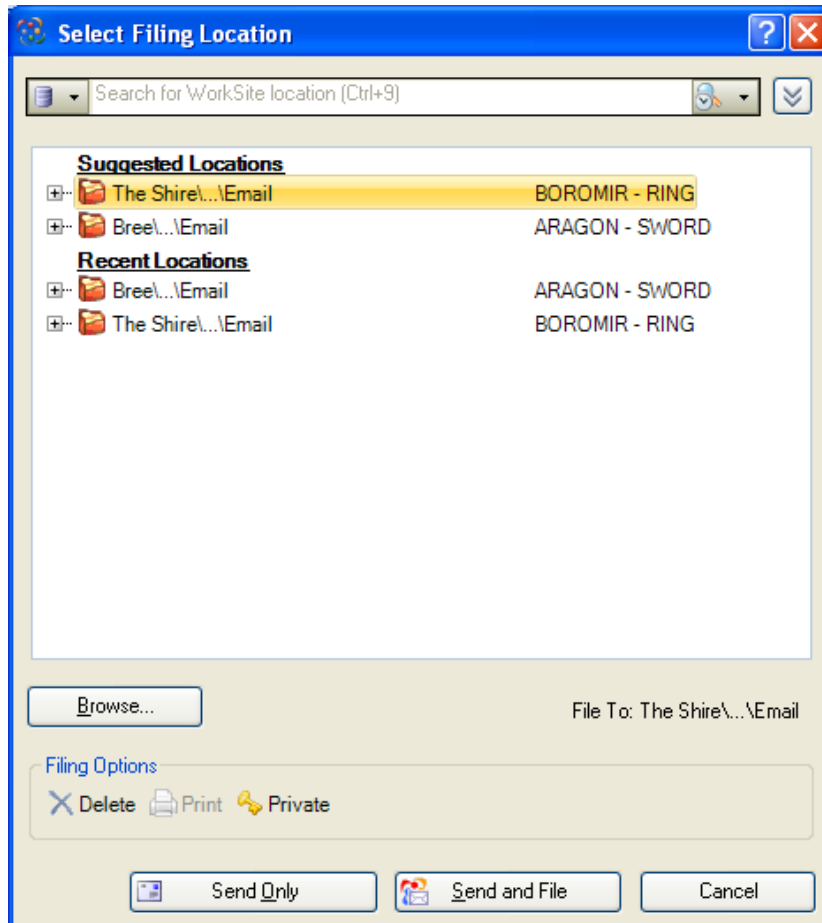
The screenshot above shows the Autonomy WorkSite filing folder found in a user’s inbox and the test emails that exist in that folder. Emails marked with a green tick have been synchronized to the DMS, emails without a tick have not been synchronized.

The emails in the filing folder will be synchronized automatically to the DMS (after a wait) or by clicking **File** in the task bar.

It is also possible to configure Autonomy WorkSite to remove filed messages from the filing folder after they are synchronized to the DMS.

## File on Send

A user may select to file an email into the Autonomy WorkSite DMS before it is sent using either the toolbar in Microsoft Outlook or the Autonomy WorkSite *Select Filing Location* dialog that is displayed after the user clicks **Send**.



Selecting **Send Only** will send the email without marking it for filing.

If an email is selected for filing several things will happen to the email:

- The subject line of the email will be altered
- A recipient will be added to the cc field (these recipients are generated automatically by the WorkSite DMS and are of the form "Folder Name <{F7}.WorkSite\_server@DMSName.domain>")
- An x-header is added

When an email is marked for filing it is moved to the senders Sent items folder as usual and WorkSite will mark the email with a gray tick to indicate that filing is pending.

Email is routed to the Autonomy WorkSite Communications Server after it leaves the corporate mail server. This is achieved using Microsoft Exchange send connectors. Autonomy WorkSite Communications Server then files the email to the WorkSite server.

## Scenario 1: Workshare Protect Server 2.1 Exchange Plugin and Autonomy WorkSite 8.5 Communications Server using Manual Filing

Workshare Protect Server Exchange Plugin synchronization occurs as expected when manually filing emails from Inbox folders to the Autonomy WorkSite Communications Server folder. The email filed to Autonomy WorkSite is the one processed by Workshare Protect Server when using this method.

However, the Workshare Protect Server Exchange Plugin synchronization to the Sent items folder does not work if a user manually files a sent item before the synchronization event completes.

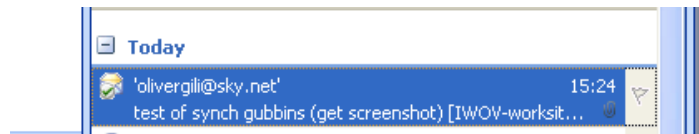
## Scenario 2: Workshare Protect Server 2.1 Exchange Plugin and Autonomy WorkSite 8.5 Communications Server using Send and File

All emails are considered to be external except now the internal recipients of the email will receive the cleaned version. This is because the email address used by Autonomy is flagged as an external email address.

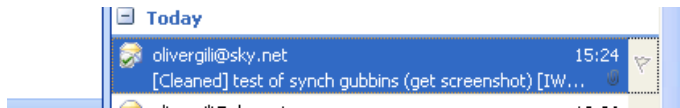
All emails marked for filing by the EMM will be routed to Workshare Protect Server (for example, an email address for filing purposes is added to the CC field of the email message). From Workshare Protect Server, the processed message is routed back to the Microsoft Exchange Server and then delivered as usual. The email saved into the Autonomy WorkSite DMS is the email processed by Workshare Protect Server.

Email Recipient	Sender	Internal Recipient	WCS	External Recipient
Email addressed to internal recipient and "Filed on Send"	Cleaning summary	Processed message	Processed message	N/A
Email addressed to external and internal recipients and "Filed on Send"	Cleaning summary	Processed message	Processed message	Processed message
Email addressed to external recipient and "Filed on Send"	Cleaning summary	N/A	Processed message	Processed message

When an email is selected for Send and File, it is added as usual to the Sent items folder and marked with a gray/green tick by Autonomy WorkSite. Even after email synchronization by the Workshare Protect Server Exchange Plugin the email remains marked by WorkSite.



The above screenshot shows a sent item with the WorkSite filing "grey/green" tick (before Workshare Protect Server Exchange Plugin synchronization).



The above screenshot shows the same email after Workshare Protect Server Exchange Plugin synchronisation.

### Scenario 3: Workshare Protect Server 2.1 Standalone (without Exchange Plugin) and Autonomy WorkSite 8.5 Communications Server using Manual Filing

As expected, in this scenario all emails filed in Autonomy WorkSite are the same email before they were processed by Workshare Protect Server. No problems were noted in Microsoft Exchange Server, Autonomy WorkSite or Workshare Protect Server as a result of performing the filing operation.

### Scenario 4: Workshare Protect Server 2.1 Standalone (without Exchange Plugin) and Autonomy WorkSite 8.5 Communications Server using Send and File

In this scenario, if the user selects to Send and File, all emails are considered to be external and are processed by Workshare Protect Server even if the original recipients of the email were all internal. The internal recipient will receive an unprocessed version of the email since the message is routed internally by Microsoft Exchange Server. The expected results will vary depending on the configuration of Workshare Protect Server and the Autonomy WorkSite Communications Server.

#### Configuration 1

Microsoft Exchange configured with two send connectors:

- The first send connector routes all emails to the Autonomy WorkSite Communications Server
- The second send connector routes all emails to Workshare Protect Server

Email Recipient	Sender	Internal Recipient	WCS	External Recipient
Email addressed to internal recipient and "Filed on Send"	N/A	Unprocessed message	Unprocessed message	N/A
Email addressed to external and internal recipients and "Filed on Send"	Cleaning summary	Unprocessed message	Unprocessed message	Processed message
Email addressed to external recipient and "Filed on Send"	Cleaning summary	N/A	Unprocessed message	Processed message

## Configuration 2

Microsoft Exchange configured with one send connector that routes all emails to Workshare Protect Server.

Workshare Protect Server configured with an additional email domain (refer to the *Workshare Protect Server Administrator Guide*).

- One email domain routes messages specifically to the Autonomy WorkSite Communications Server
- The default domain sends emails externally/to an email gateway

Email Recipient	Sender	Internal Recipient	WCS	External Recipient
Email addressed to internal recipient and "Filed on Send"	Cleaning summary	Unprocessed message	Processed message	N/A
Email addressed to external and internal recipients and "Filed on Send"	Cleaning summary	Unprocessed message	Processed message	Processed message
Email addressed to external recipient and "Filed on Send"	Cleaning summary	N/A	Processed message	Processed message

## Contact Information

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