



MailSite Team, Version 1.0

Product Reviewer's Guide

Revision 4

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1 Introduction

Thank you for your interest in MailSite Team, Version 1.0, the new Microsoft Outlook plug-in from Rockliffe that transparently connects Outlook to MailSite mail servers while retaining collaborative functionality. With the new MailSite Team plug-in, MailSite mailboxes operate as full Outlook information stores containing any kind of Outlook item, not just messages.

MailSite Team supports sharing of users' individual folders, calendaring information, meeting scheduling, and much more. All the functions are natively supported by Outlook. As a result, users can share data using a Rockliffe MailSite server, rather than expensive, specialized groupware servers.

By switching to MailSite, IT departments can greatly reduce their email server costs – the amount of hardware, management, and software licenses – while increasing the overall stability and availability of their email systems. MailSite Team allows lets end-users continue to use the same familiar email client they are accustomed to, so there are no switching costs or retraining.

2 Company Overview

Rockliffe is a leading developer of scalable messaging and [email infrastructure software](#) for service providers, telecommunication carriers, wireless carriers and enterprises. Rockliffe was established in 1995 and is based in California's Silicon Valley with European headquarters in Leeds, UK.

Rockliffe has more than 3,000 [customers](#) with more than 15 million mailboxes worldwide. These include telecommunication carriers such as Portugal Telecom, France Telecom; wireless carriers such as Verizon; service providers such as Digex, [ActiveISP](#), Express Technologies, and Mail2World; unified messaging providers such as [Call Sciences](#); web portals like Webtone, and large enterprises including AT&T, Boeing, Victoria University, and UK government departments.

For further information, visit www.rockliffe.com.

3 Product Line Overview

Rockliffe Messaging Servers

MailSite SE - For Small-to-Medium Size Businesses

MailSite SE is a full-featured mail server for small-to-medium sized (up to 500 employees) companies that is easy to install and maintain. It has been designed with the nonprofessional administrator in mind. It does not require extensive training or advanced certification in order to install and operate. This means that smaller companies don't need to employ a full time administrator to run their email system. MailSite SE is also an attractive choice for service providers who offer dedicated hosted email services.

MailSite LE - For Large Enterprises

MailSite LE is a full-featured mail server for large enterprises that is secure, reliable, and highly scalable. MailSite LE is designed with a modular, distributed architecture that scales across multiple, clustered application servers. The data repository is installed on a database server and the message store is installed on a file server. This modular architecture creates redundancy, accommodates scalability and helps deliver 24x7 uptime. The advanced clustering architecture allows MailSite LE to scale to support hundreds of thousands of users. This makes MailSite LE the only affordable, scalable choice for large enterprises on Microsoft Windows platforms.

MailSite SP - For Service Providers

MailSite SP is an affordable, scalable platform for email service providers that provides revenue generating service options. Although targeted primarily at the service provider market, MailSite SP shares the same secure, reliable, and highly scalable architecture as its sister product – MailSite LE. For service providers, this advanced clustering architecture allows MailSite SP to scale to support millions of subscribers. This makes MailSite SP the only scalable choice for service providers that run their operations on Microsoft Windows platforms.

Rockliffe Content Filters

MailSite Spam Filter

MailSite Spam Filter is a part of the new MailSite 6 product line introduction. It is a next-generation spam blocking solution that uses a “cocktail” approach of technologies to detect and eliminate spam. By providing end-user controls, false positives are avoided. MailSite Spam Filter analyzes email during processing, to identify spam before it's delivered. Configuration options allow end users to review their server-identified spam, or an automated server quarantine of spam can be used.

MailSite Virus Filter

MailSite Virus Filter is an integrated MailSite add-in that blocks viruses at their network entry point – the email server. This prevents them from getting past user defenses and protects corporate data. MailSite Virus Filter detects and removes viruses, worms and Trojans from incoming, outgoing and internal email traffic in real time, before viruses can enter or leave the network.

Rockliffe Clients

MailSite Team

MailSite Team transparently connects Microsoft Outlook to Rockliffe MailSite mail servers while retaining the collaborative functionality. MailSite Team mailboxes operate as full Outlook information stores containing any kind of Outlook item, not just messages. MailSite Team supports sharing of users' individual folders, calendaring information, meeting scheduling, and much more. All the functions are natively supported by Outlook. As a result, users can share data using a Rockliffe MailSite server, rather than expensive, specialized groupware servers.

4 Product Highlights

With MailSite Team, IMAP mail accounts, which were once limited to storing Outlook mail messages and posts, can now handle all kinds of Outlook items. MailSite Team can turn a Rockliffe MailSite IMAP server into a full groupware platform.

MailSite Team end-users and administrators who work with Rockliffe MailSite mail servers can add groupware functionality to their environment and still gain the benefits of the Open Standards Internet Mail Model and the usability of Microsoft Outlook. MailSite Team also maintains the Microsoft objects, MAPI properties and Outlook components allowing interoperability without having to use third party protocols or objects. MailSite Team provides support for the following Outlook features when connected to Rockliffe MailSite mail servers.

- Native Outlook Calendar Sharing
- Publish free/busy
- Group scheduling
- Contact Manager
- Global Contact Lists
- Task List
- Auto Archiving
- Outlook free-form notes
- Activity Journal
- Voting buttons
- Out of office notification
- New mail notification enabled
- Send/Receive Group requests
- Send/Receive meeting request response (accept/decline messages)
- POP & IMAP support
- Client Side rules
- Reminder Window
- Shared Folders
- LDAP/Contact Address book

5 How MailSite Team Works

Microsoft Outlook Plug-in Architecture

MailSite Team installs as an Exchange client extension, so it's compatible with all versions of Outlook. MailSite Team maps the IMAP folders in a user's mailbox to a Personal Folders (.PST) file on the local machine and synchronizes the .PST file with the server folders either on demand, or when Outlook starts and shuts down.

Although Outlook does not typically let you use an IMAP account as the default information store (which is where the default Inbox, Contacts, and other folders reside), that rule doesn't apply here because Outlook sees the MailSite Team-enabled .PST file as a .PST file, not as an IMAP account. As a result, items synchronized from the IMAP account to the Personal Folder (.PST file) work like native Outlook items. Tasks and appointments fire reminders. Contacts appear in the Outlook Address Book. Sent messages appear in the Sent Items folder, and items you delete appear in the Deleted Items folder.

Powered by Rockliffe MailSite Servers

The real benefit comes from using MailSite Team with the Rockliffe MailSite mail server. MailSite Team end-users can share their IMAP mailbox folders with other MailSite Team end-users on the same server and access any folders that other users have shared. MailSite Team synchronizes those folders in other users' mailboxes to the local .PST file so that users can work with them offline. (Exchange doesn't support access to other users' folders in its current implementation of offline folders.) MailSite Team also lets you create public calendar, contacts, and other special Outlook folders that work like regular Outlook folders.

Figure 1 - MailSite IMAP Account Configured Without MailSite Team

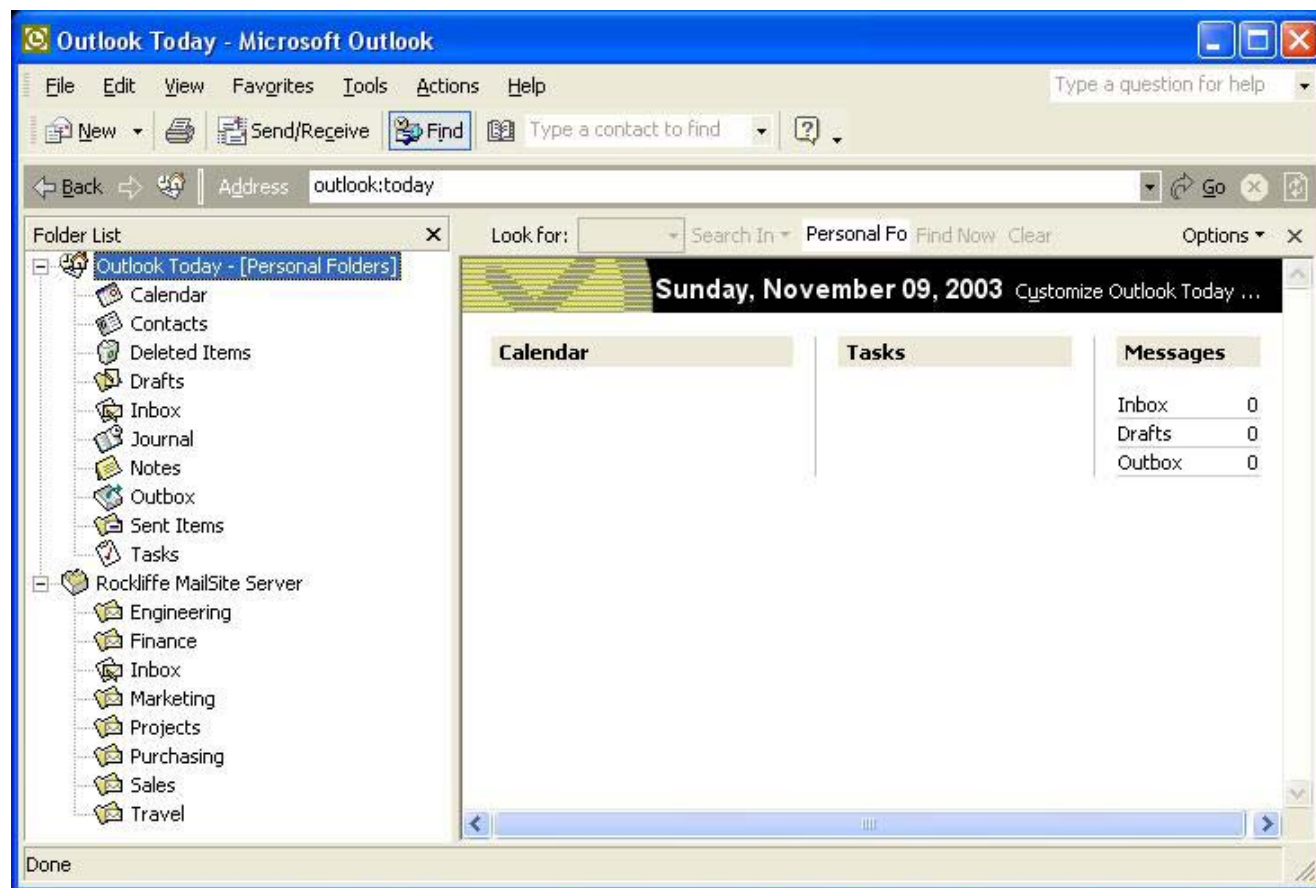


Figure 1 illustrates how MailSite IMAP accounts appear in Outlook **before** using the MailSite Team client software.

Figure 2 - MailSite IMAP Account Configured With MailSite Team

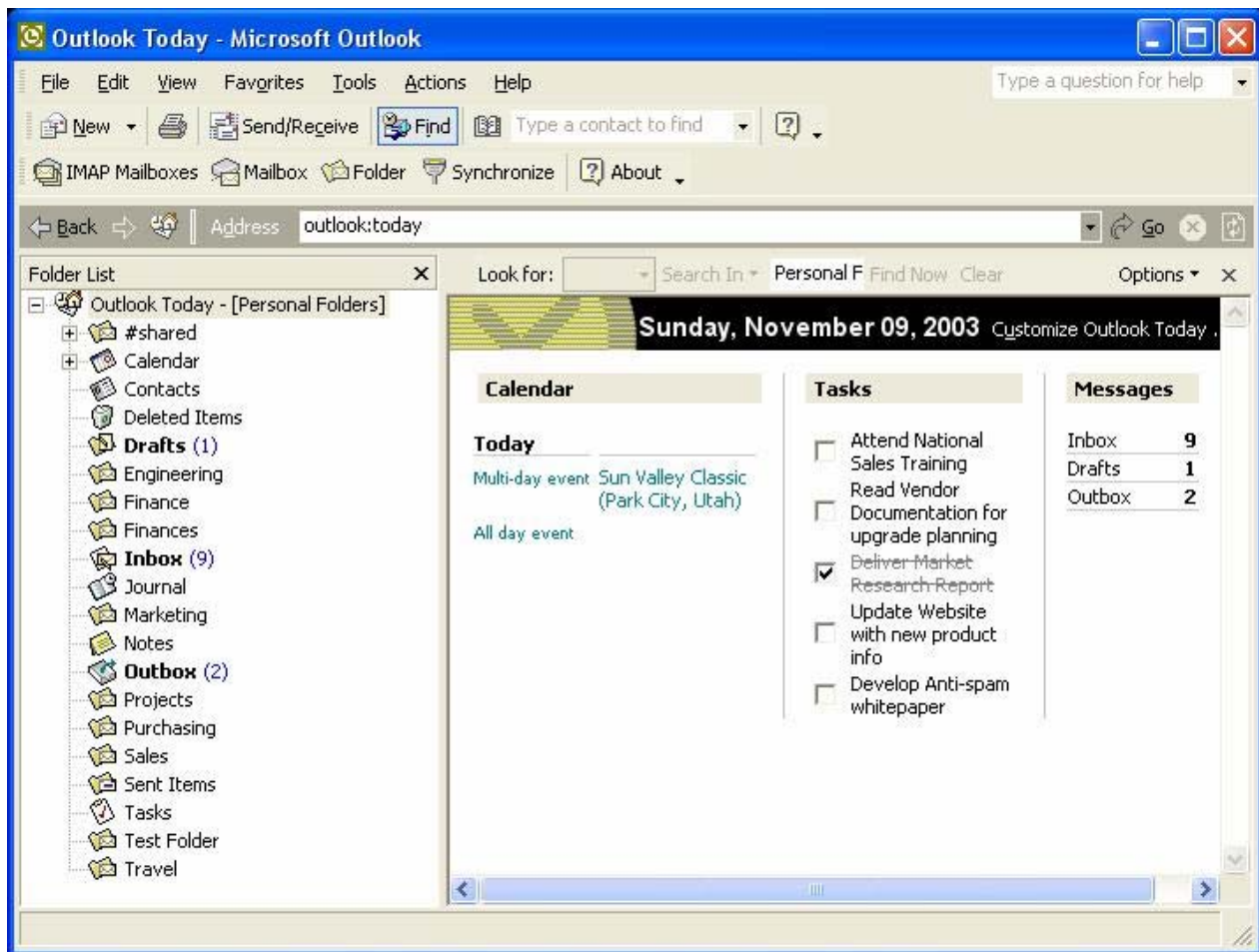


Figure 2 illustrates how MailSite Team IMAP accounts appear in Outlook Personal Folders **after** using MailSite Team client software.

6 Getting Started

MailSite Team System Requirements

Before installing MailSite Team, please review the following system requirements and verify that the computer you intend to use for your MailSite Team evaluation supports the recommended configuration.

MailSite Server

- Rockliffe MailSite SE/LE/SP version 5.3 and above

Desktop Hardware

- Microsoft Windows Compatible Hardware
- 256MB RAM minimum

Desktop Software

- Microsoft Outlook 2000, 2002 (XP), 2003
- Microsoft Windows 2000 Professional, XP, 2003

Evaluation Key Included

To evaluate MailSite Team free for 60 days, simply click CANCEL when the installation wizard prompts you for this information. This will install the product in demo mode and allow you access to all of the features and options available within the MailSite Team product.

Planning your MailSite Team Product Review

Backup your test data

Before installing MailSite Team, please backup any existing PST files. It is recommended to set up MailSite Team using a brand new PST file. You can import items (ex. messages, calendars, contacts, notes, tasks) from an existing .PST file after you have created your initial MailSite Team configuration.

Preparing your Microsoft Outlook test client

MailSite Team is a plug-in for Outlook; therefore, Outlook must be installed and registered as the default mail client before installing MailSite Team. Outlook must be installed in Corporate Workgroup mode for all features to perform correctly.

If Outlook has been installed previously on your client test computer and a user profile has been created, it is recommended that you create a completely new profile for this testing. If Outlook has not been previously installed on the client test computer, then it is recommended that you do not create any user profiles at this time. The MailSite Team configuration wizard will guide you through the creation of this new profile later in this review guide. Make sure that Outlook and any other unnecessary programs are closed before installing MailSite Team.

Administrator Privileges Required

MailSite Team will only install on systems where the user has administrative rights.

Installing the MailSite mail server

Before you install MailSite Team, you will need to install the Rockliffe MailSite mail server. Follow the installation instructions provided in the *MailSite Administration Guide*. For additional information regarding Rockliffe MailSite mail server functionality, please refer to the *MailSite 6 Product Reviewer Guide*, provided as part of the MailSite Team reviewer's kit distribution.

Installing the MailSite Team client software

Once you have installed the Rockliffe MailSite mail server and successfully verified its installation, you will then be ready to install the MailSite Team client software. For testing and review purposes, MailSite Team can be installed on the same computer running the MailSite SE server or another Windows client computer. Follow the installation instructions provided in the *MailSite Team User Guide*.

Quick Start – Getting Up and Running with MailSite Team

This section provides the reviewer with some recommendations on the initial MailSite Team configuration and setup.

Choosing the Default Synchronization Method

During installation, MailSite Team prompts for the default synchronization method to be used for synchronizing mailbox folders. MailSite Team provides the following default synchronization methods.

1. Automatically (Every time user selects a folder)
2. Manually (User clicks on “Synchronize” button)
3. When Outlook starts up and exits

It is recommended to synchronize folders manually in order to restrict heavy network traffic that may occur due to frequent folder synchronization.

Creating a New Outlook Profile

Follow the instructions in section 2 of the *MailSite Team User Guide* entitled “*MailSite Team and Outlook Configuration*” to create a new Outlook profile and a POP email account. Although MailSite Team uses IMAP for its synchronization, an Outlook POP email account is required to define outbound SMTP server settings.

Running the MailSite Team Configuration Wizard

The first time you run Outlook after installing MailSite Team, a configuration wizard will start that gathers the required server information. After you have entered your MailSite hostname, login, and password, click on the “Ping Server” button to verify that you can successfully connect to the MailSite mail server.

The MailSite Team configuration wizard will then prompt you to create a new .PST file or to use an existing one. Select the option to “Add a new PST file”.

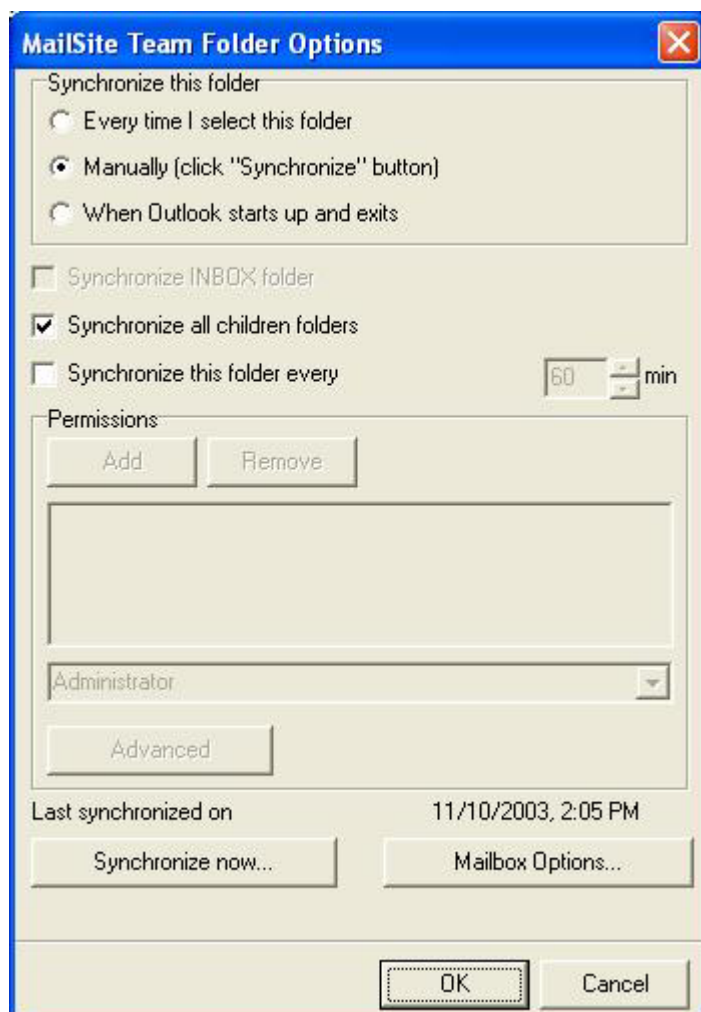
All of the options available from this configuration wizard are also available from the MailSite Team toolbar from within Outlook and can be changed at any time.

Synchronizing Your Mailbox for the First Time

Initial synchronization of a user’s mailbox folders may take longer than future synchronizations because all messages on the server have to be transferred to the local message store on the client. The next time a folder synchronizes, it only needs to download new messages, and upload modified messages. Please allow sufficient time in your schedule if you are synchronizing large amounts of mailbox data for several users.

To begin the synchronization of your test client mailbox for the first time, select the top level personal folder entitled “Outlook Today – [Personal Folders]” and click the ‘Folder’ button on the MailSite Team toolbar. The MailSite Team Folder options window will then appear (Figure 3). Check the “Synchronize all children folders” option and then click on “Synchronize now...” The mailbox synchronization will then begin for all folders except the Inbox folder. The next section will tell you how best to synchronize your Inbox.

Figure 3 - MailSite Team Folder Options



Synchronizing Your Inbox – IMAP vs. POP

MailSite Team offers the option to download mail to the inbox via IMAP using MailSite Team or POP using an Outlook POP email account. IMAP is the recommended and default method for inbox mail retrieval using MailSite Team. In order to avoid potential message duplication errors resulting from using both POP and IMAP simultaneously, MailSite Team does not automatically synchronize the Inbox by default.

After you have completed the synchronization of all other folders, select the Inbox and click the ‘Folder’ button again on the MailSite Team toolbar. Click on the “Synchronize INBOX folder” option and then click ‘ok’ to exit the dialogue. Note that this option will be grayed out if you did not properly select the Inbox folder prior to clicking on the ‘Folder’ button. You can also set the frequency for checking for new messages from this Folder options dialogue.

Please refer to appendix B in the *MailSite Team User Guide* for more discussion regarding POP vs. IMAP mail retrieval and how to configure MailSite Team to retrieve mail using POP protocol.

7 Reviewing MailSite Team

To assist the reviewer in evaluating the new features available within MailSite Team, we have documented the following tips and suggestions for use. This section references specific sections within the MailSite Team User Manual where you can find additional information, examples, and screenshots regarding the MailSite Team features covered here.

MailSite Team Folder Sharing

MailSite Team allows users to share all special folder types available in Outlook with other users that reside on the same MailSite mail server.

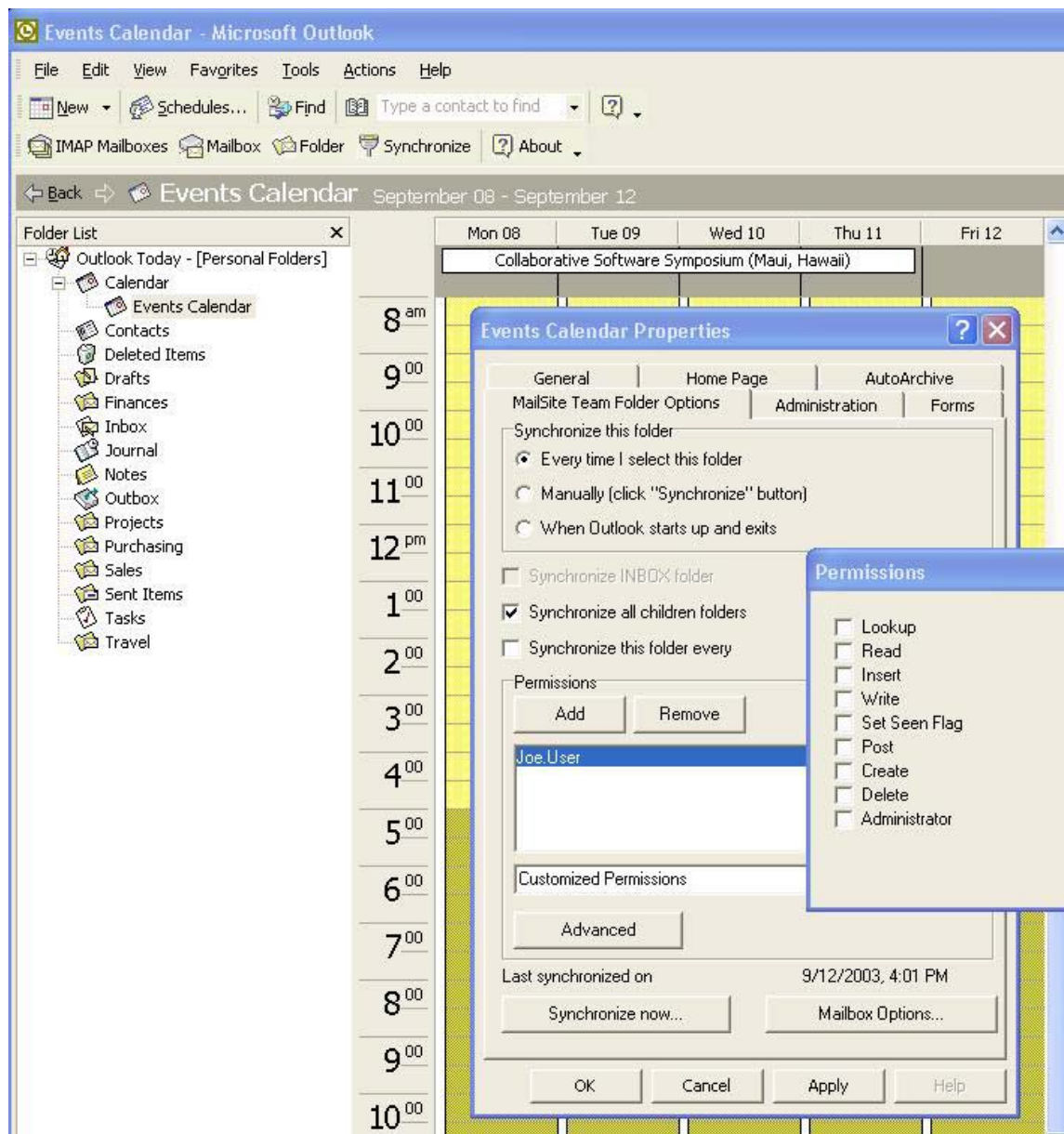
- Calendar items
- Contact items
- Journal items
- Mail and Post items
- Note items
- Task items

User defined forms are also supported. In the Workgroup or Exchange mode, the major functions of Outlook turn-on or become enabled for the user. All information is stored on the MailSite mail server. Regular mail and post items are treated as normal IMAP messages; nothing special is done to or with them.

Special Folder Types Are Handled Differently

Each folder that contains special items has an internal IMAP message that lets the MailSite Team plug-in know what type of folder it is. The rest of the messages are IMAP messages that contain valuable information in the headers, and an attachment. The attachment exists as MIME and Outlook initiates a stream that structures text, formatting, MAPI components, CDO's, Outlook Objects, and attachments. Each attachment provides the version of each individual item, for example, a Meeting Request, or Contact entry.

Figure 4 - Assigning Folder Sharing Permissions



To assign and manage folder sharing permissions, highlight the folder you would like to share and select the 'Folder' button on the MailSite Team toolbar. The MailSite Team folder options will then appear as above in Figure 4.

Click 'Add' to add users, enter the user name, using the email mailbox login ID on the MailSite server. If MailSite is configured to use Windows authentication, the users' Windows login names and MailSite login names will be identical. There are four standard predefined folder option permissions.

1. **Administrator** (Full rights)
2. **Guest** (Lookup, Read, Set Seen Flag rights)
3. **Power User** (All rights except for 'Administrator').
4. **User** (All rights except for 'Create', 'Delete', and 'Administrator')

Figure 5 - Native Outlook Calendar Sharing

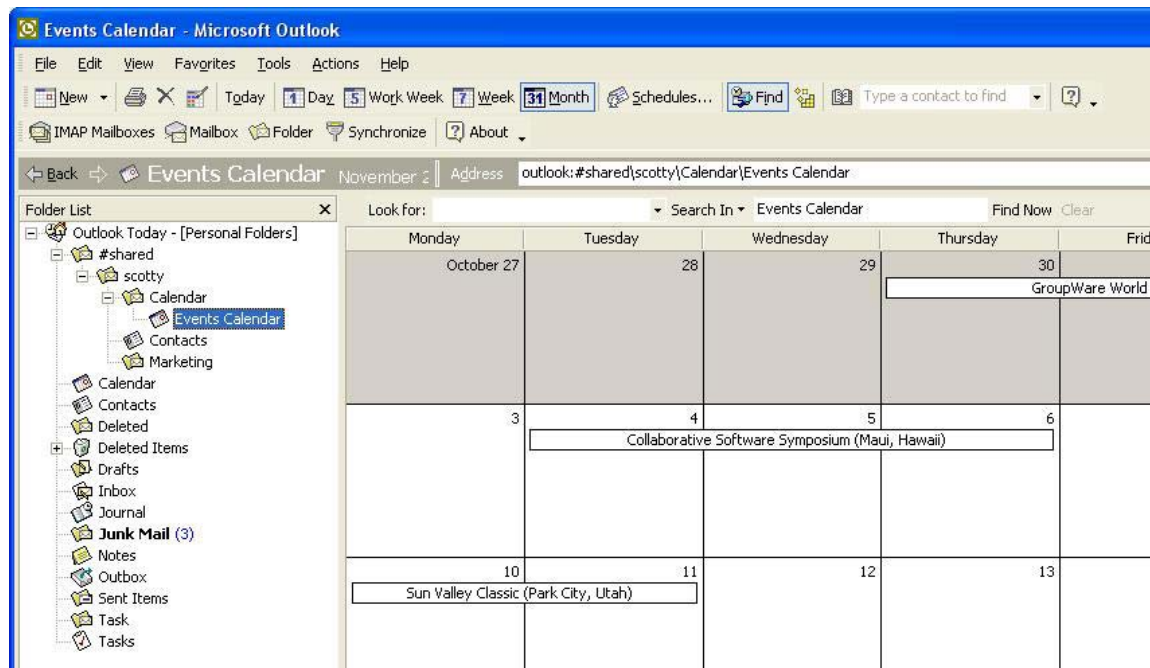
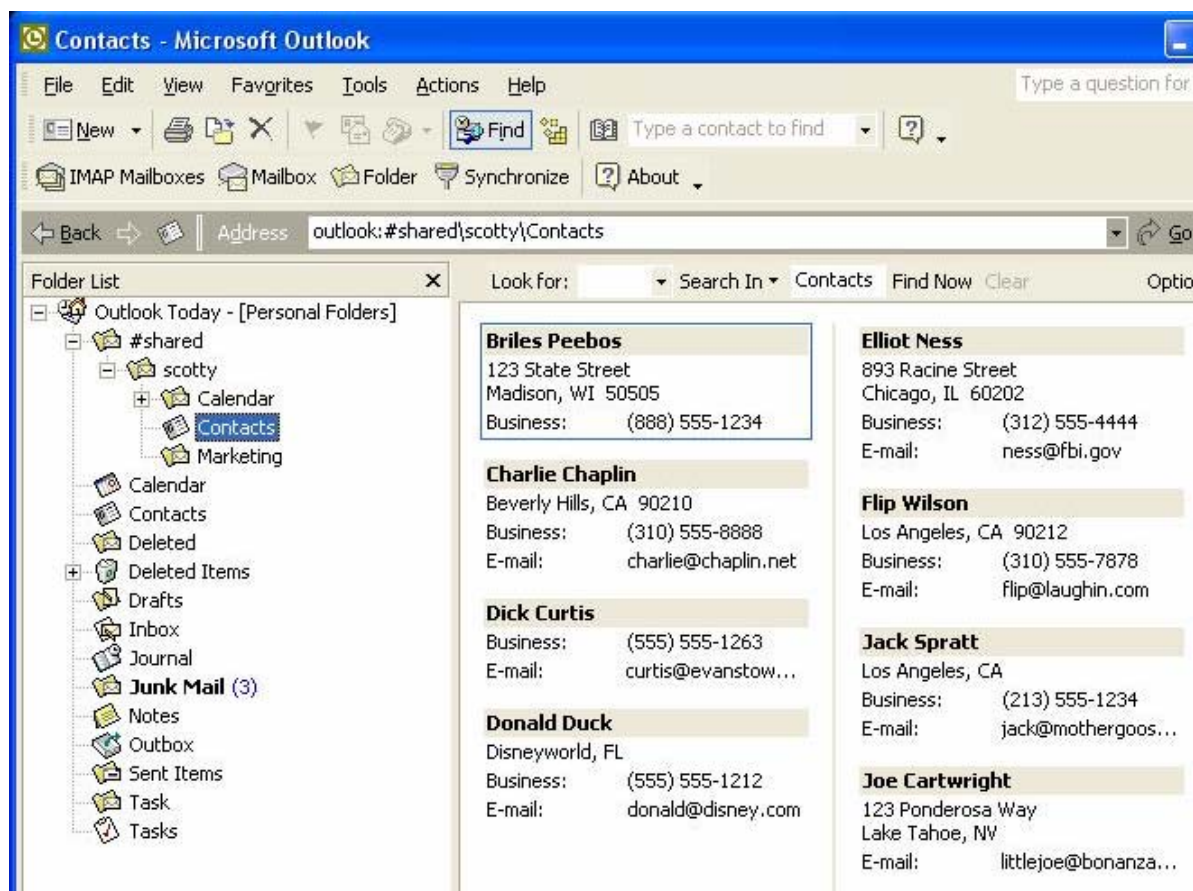


Figure 6 - Native Outlook Contact Sharing



8 Summary

MailSite Team is for service providers and corporations who want to use highly scalable, reliable, and secure messaging and collaboration without losing Microsoft Outlook functionality. By switching to MailSite, IT departments can greatly reduce their email server costs – the amount of hardware, management, and software licenses – while increasing the overall stability and availability of their email systems. MailSite Team allows lets end-users continue to use the same familiar email client they are accustomed to, so there are no switching costs or retraining.

Small & Midsize Businesses

- MailSite Team adds Exchange-like groupware functionality to Rockliffe's standards-based MailSite email server software.
- MailSite Team allows end users to utilize the groupware and collaboration features of Outlook without the cost and complexity of Exchange.
- Rockliffe MailSite is pre-integrated with best of breed SMTP anti-virus and anti-spam services and saves on expensive integration fees and maintenance contracts.
- MailSite Team is easy to install and configure and all services can be provided from a single Windows server.

Large Enterprises – for the IT Manager/Director

- MailSite Team offers Exchange-like benefits with the performance and scalability of the standards-based MailSite email server software
- MailSite Team can be quickly and easily deployed in high performing fault-tolerant clusters with a far lower TCO than groupware alternatives
- MailSite Team allows end users to utilize the groupware and collaboration features of Outlook without the cost and complexity of Exchange
- Rockliffe MailSite is pre-integrated with best of breed SMTP anti virus and anti spam services and saves on expensive integration fees and maintenance contracts

Service Providers – for the Business Development Director:

- MailSite Team offers Exchange-like benefits with the performance and scalability of the standards-based MailSite email server software
- MailSite Team can be quickly and easily deployed in high performing fault-tolerant clusters with a far lower TCO than groupware alternatives
- MailSite Team allows end users to utilize the groupware and collaboration features of Outlook without the cost and complexity of Exchange
- Rockliffe MailSite is pre-integrated with best of breed SMTP anti virus and anti spam services and saves on expensive integration fees and maintenance contracts
- MailSite Team allows you to provision this service at the mailbox level so that you can offer a value added service to your subscribers at a price they can afford

9 Contact Information

For additional assistance with your MailSite 6 evaluation, please contact one of the following Rockliffe representatives.

In the United States:

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10 Facts At A Glance

Rockliffe Systems, Inc.

- Email & Messaging Infrastructure Software
- More than 3,000 Customers
- More than 15,000,000 Mailboxes
- Worldwide Sales & Support

MailSite 6 Product Line

- MailSite SE – For Small-to-Medium Size Businesses
- MailSite LE – For Large Enterprises
- MailSite SP – For Service Providers
- MailSite Spam Filter – For All MailSite Customers
- MailSite Virus Filter – For All MailSite Customers
- MailSite Team – For All MailSite Customers

MailSite 6 Product Availability

- MailSite 6 SE, LE, and SP Servers are generally available (GA)
- MailSite Spam and Virus Filters are generally available (GA)
- MailSite Team is generally available (GA)

MailSite 6 Product Packaging Options

- MailSite SE, LE, and SP Servers – Perpetual License
- MailSite Spam Filter – Annual Subscription Service
- MailSite Virus Filter - Annual Subscriptions Service
- MailSite Team – Perpetual License
- Support Programs (Standard, Enhanced, And Premium)

MailSite 6 Product Distribution Channels

- Rockliffe Webstore (<https://www.rockliffe.com/order/>) – MailSite SE Only
- Resellers and Distributors – MailSite SE, LE, and SP

10.1 Terms Used in this Guide

POP - Short for *Post Office Protocol*, this is a protocol used to retrieve e-mail from an e-mail server. Most e-mail applications (called a *client*) use the *POP* protocol, although some can use the newer *IMAP* (Internet Message Access Protocol). *POP3* also limits the mail user to one mail folder apiece.

IMAP - Short for *Internet Message Access Protocol*, a protocol for retrieving e-mail messages. The latest version, *IMAP4*, is similar to *POP3* but supports some additional features. For example, with *IMAP4*, you can search through your e-mail messages for keywords while the messages are still on mail server. You can then choose which messages to download to your computer. *IMAP* also allows the user to create and maintain multiple folders on the e-mail server.

SMTP - Short for *Simple Mail Transfer Protocol*, this protocol is used for sending e-mail messages between servers. Most e-mail systems that send mail over the Internet use *SMTP* to send messages from one server to another; the messages can then be retrieved with an e-mail client using either *POP* or *IMAP*. In addition, *SMTP* is generally used to send messages from a mail client to a mail server. This is why you need to specify both the *POP* or *IMAP* server and the *SMTP* server when you configure your e-mail application.

PST - When messages, appointments, tasks, journal entries, etc. are created, Outlook saves the information in a data file on your computer. This file is called a "Personal Folders" file because it is saved locally with a .PST file extension. The .PST file is generic and compatible with Outlook XP, 2000, 98, and 97.

Header - For our purposes, a header is that information that precedes an e-mail. In an e-mail transfer, the header is a part of the data packet and contains transparent information about the file and/or the transmission. The file header may contain the date the file was created, the date it was last updated, and the file's size amongst other items. The header can only be accessed by the operating system or by special programs.

Bandwidth - This describes the amount of data that can be transmitted from device to device. For digital devices, bandwidth is expressed in bits per second (bps) or bytes per second. For analog devices, the bandwidth is expressed in cycles per second, or Hertz (Hz).