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## Amstelco Secure Messages Message Retention

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A screenshot of the 'Amstelco Secure Messages Archive Retrieval' application window. The window title is 'Amstelco Secure Messages Archive Retrieval'. The interface has a green header bar with the 'Secure Messages' logo on the left and the text 'Archive Retrieval' on the right. Below the header, there is a search form with the following fields: 'Path to Amstelco Secure Messages Archive Files:' with a text box containing '\\fileserver.mmcnet.org\Archives\ASM' and a browse button; a checkbox for 'Has Attachments'; 'Name:' with a text box containing 'Alan Caspar'; 'User Name:' with an empty text box; 'Role:' with an empty text box; 'Start Date:' with a date picker set to '04/25/2024'; 'End Date:' with a date picker set to '05/25/2024'; 'Subject:' with an empty text box; 'Message Contents:' with a text box containing 'Emergency'; and 'Group ID:' with a text box containing '3'. A green 'Search' button is located at the bottom right of the form area.

Amstelco recommends archiving message files on a regular basis to maintain available storage space for active messages as well as to create records of old messages so that they can be removed from the system database. Messages are automatically deleted from the database by the archive procedure after they have been copied. The choice of storage method and the duration of storage are determined by the system administrator and the system platform.

The Amstelco Secure Messages (ASM) archiving routine is based on the premise that messages need to be copied to external storage in order to be preserved for multiple years as specified by governmental regulations and industry best practices. The archive routine copies all elements of a message, including addressing, message content, attachments, and complete message histories. Amstelco Secure Messages archives can be written to a local hard disk in the application server, to an external storage device such as a NAS/SAN system, or to USB flash drives or CD-ROMs. The choice of storage method and the duration of storage are determined by the user.

**Note:** When configuring Amstelco Secure Messages archiving, make sure that the location where the archives are stored is secured with the appropriate access restrictions to prevent unauthorized access to message content and attachments.

Setting message retention times are fully user defined. The process of archiving messages before they are removed from the system database is different for on-site systems and for hosted service subscribers. This document explains the process for both types of implementations.

## Archiving Options

The Amtelco Secure Messages server application can be programmed to archive and delete messages automatically on a daily basis. The Amtelco Secure Messages archive mode and archive threshold are programmed on the Configuration tab of the Amtelco Secure Messages Admin Web application.

### Database Details

The Database Details section of the System Configuration page displays information about the Amtelco Secure Messages database.

Column	Description
<b>Database Limit</b>	The Database Limit specifies the maximum size that the Amtelco Secure Messages database is allowed to reach. For on-site Amtelco Secure Messages installations, the Database Limit can be configured in the Amtelco Secure Messages Server Configuration application.
<b>Archive Limit</b>	The Archive Limit specifies the maximum total allowed storage space size for all Amtelco Secure Messages archive files. For on-site Amtelco Secure Messages installations, the Archive Limit can be configured in the Amtelco Secure Messages Server Configuration application.
<b>Database Size</b>	The Database Size is the current size of the Amtelco Secure Messages database.
<b>Unallocated Database Size</b>	The Unallocated Database Size is the amount of disk space within the Amtelco Secure Messages database that is no longer in use.

Column	Description
<b>Maintenance Time</b>	The Maintenance Time is the time, in 24-hour military format, when the Amtelco Secure Messages archive task is performed each day. For on-site Amtelco Secure Messages installations, the Maintenance Time can be configured in the Amtelco Secure Messages Server Configuration application.

### Archive Mode

The Archive Mode determines how messages are archived.

The Archive Mode setting is located in the System Settings pane on the System Configuration page.

- **Select “None” to keep all messages until they are manually deleted.**

The None option does not archive any message threads.

- **Select “Purge Only” to purge messages older than the Archive Threshold without saving them to an archive file.**

The Purge Only option does not archive any message threads and automatically deletes threads older than the Archive Threshold.

- **Select “Local Storage” to archive messages older than the Archive Threshold to a local drive specified in the Amtelco Secure Messages Server Configuration.**

The Local Storage option is only available for on-site Amtelco Secure Messages installations. When selecting the Local Storage option, make sure that your Amtelco Secure Messages Server Configuration specifies a Thread Archive Path to a secure location that is protected by appropriate access restrictions to prevent unauthorized access to message content and attachments.

This option requires the purchase of the Archive feature.

- **Select “AmazonS3” to archive messages older than the Archive Threshold to the Amazon Simple Storage Service (S3).**

The Amazon S3 option is available on both hosted Amtelco Secure Messages subscriptions and on-site Amtelco Secure Messages installations and requires a customer-provided Amazon S3 account. When selecting the Amazon S3 option, make sure that your Amazon S3 account is configured with the appropriate access restrictions to prevent unauthorized access to message content and attachments.

This option requires the purchase of the Archive feature. It may also require the purchase of additional storage space depending on your needs.

### Archive Threshold

The Archive Threshold determines the minimum age of the threads that will be archived daily. The age of the thread is determined by the last time that anyone modified the thread.

The Archive Threshold setting is located in the System Settings pane on the System Configuration page.

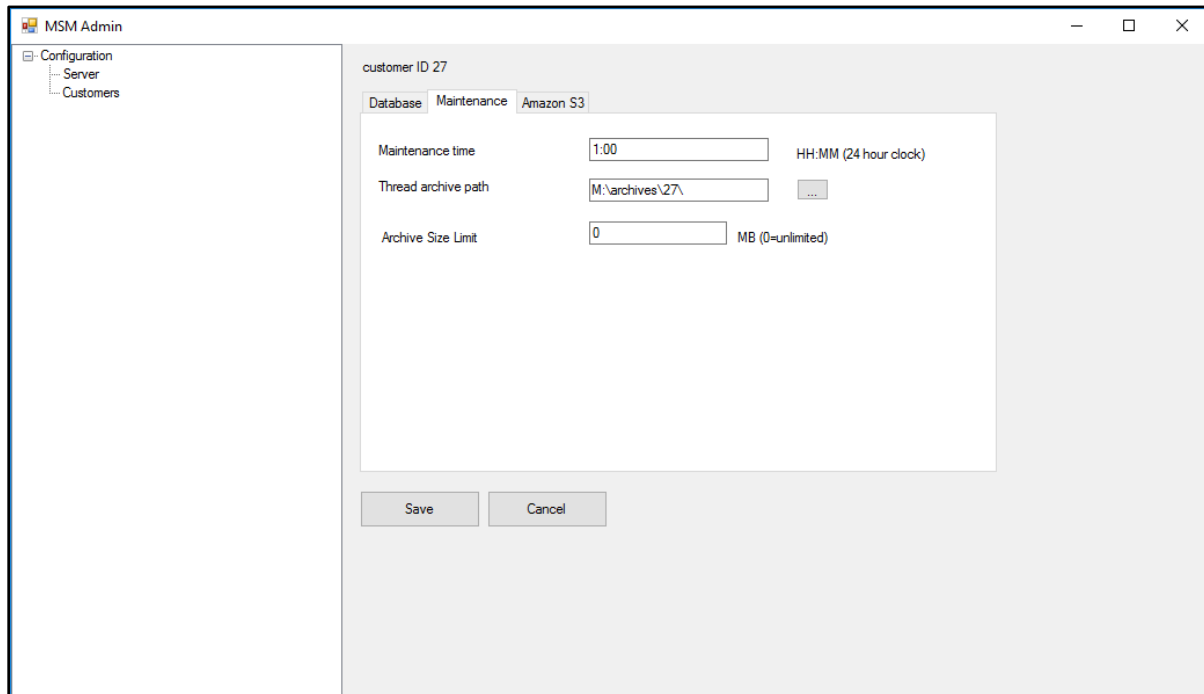
**Enter the number of days to keep a thread before it is archived.**

## Saving Your Configuration Settings

When you have finished entering the configuration settings, click the **Save** button to update the settings.

## Local Archiving

For on-site Amtelco Secure Messages installations, the Amtelco Secure Messages server application can be configured to customize the Amtelco Secure Messages archive procedure. The archive procedure is established on the Maintenance tab of the ASM Server Configuration application.



### Maintenance Time

The Maintenance Time setting determines the time that the archive task is performed each day.

**Specify the time to begin archiving Amtelco Secure Messages data each day.**

The time must be specified using 24-hour notation in the following format.

*HH:MM*

Replace *HH* with the two-digit number of hours past midnight, in the range of 00 to 23.

Replace *MM* with the two-digit number of minutes past the hour, in the range of 00 to 59.

**Note:** For customers of the cloud-based Amtelco Secure Messages subscription service, a default message retention time is determined in consultation with Amtelco's Field Engineering Department at the start of the subscription.

### Thread Archive Path

The Thread Archive Path determines where Amtelco Secure Messages archive files are stored when using the Local Storage Archive Mode.

To configure the archive path, click the **Browse** button.

The Browse for Folder window is displayed.

**Browse to the location where you want to store the archive files.**

The account that runs the ASM Service must have permission to read and write to the selected archive location. If you are using the optional High Availability configuration, the thread archive path on both Amtelco Secure Messages servers should be set up to Amazon or to a file share. If this is not done, archives could end up being split between the servers, making it harder to find archived messages.

**Note:** Archive files should be stored in a secure location that is protected by appropriate access restrictions to prevent unauthorized access to message content and attachments.

**Click the OK button.**

The path to the selected location is displayed in the Thread Archive Path field.

### Archive Size Limit

The Archive Size Limit is the maximum total allowed storage space size for all Amtelco Secure Messages archive files, in megabytes (MB).

- **To limit the amount of storage space that can be consumed by Amtelco Secure Messages archive files, enter the maximum total number of megabytes of space that all archive files are allowed to use.**
- **To allow unlimited archive file storage, enter 0 (zero).**

### Save

**When you have finished making changes to the Maintenance Properties, click the Save button to save your changes.**

**Note:** Your customer configuration settings will not take effect until the customer data is reloaded.

**To reload the customer configuration, click the Database tab to display the database settings. Then click the Reload Customer Data button.**

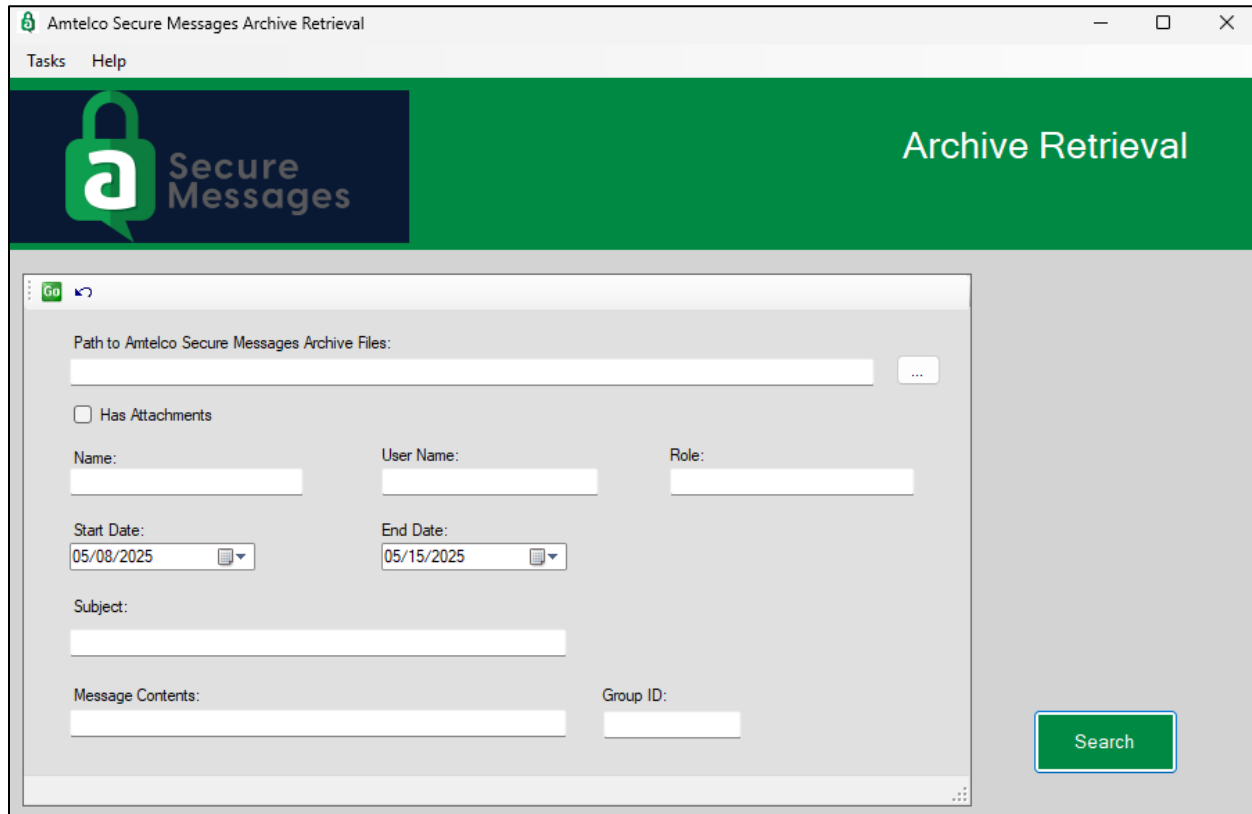
### Cloud-based Archiving

Customers of the cloud-based Amtelco Secure Messages subscription are advised to manage their own archives using the tools provided by Amazon S3. Amazon S3 online tools also are an option for customers with on-site Amtelco Secure Messages system.

The Amazon S3 archive option requires an Amazon S3 account, not provided by Amtelco.

## Retrieving Archived Messages

Archive files are encrypted and can only be read by the Amtelco Secure Messages Archive Retrieval utility. The procedure for retrieving archived messages from their long-term storage is the same for on-site system users as it is for subscribers to the cloud-based Amtelco Secure Messages subscription service.



**Open the Amtelco Secure Messages Archive Retrieval utility by double-clicking the Archive Retrieval icon on the desktop or by selecting the Archive Retrieval utility from the Start menu.**

The Amtelco Secure Messages Archive Retrieval window is displayed.

### Path to Amtelco Secure Messages Archive Files

In order to retrieve archived messages, the Amtelco Secure Messages Archive Retrieval utility must have access to the archive files that contain the messages you want to retrieve. Archive files are generated by the Amtelco Secure Messages server and have a file extension of msmaarc.

**Click the Browse button.**

The Browse For Folder window is displayed.

**Navigate to the directory that contains the archive files that you want to search.**

The Amtelco Secure Messages Archive Retrieval utility is able to search the selected directory and all of its subdirectories. If you want to search files contained in multiple directories, select a parent directory that encompasses the archive directories.

**Click the OK button to save the path to the Amtelco Secure Messages Archive Retrieval window.**

Has Attachments

The Has Attachments check box limits the search to messages that have attachments.

- **Select the check box to search for messages that have attachments.**
- **Clear the check box to search for messages with and without attachments.**

## Name

The Name field is used to search for messages sent to or from a user's Amtelco Secure Messages display name.

**To search for messages that were sent to or from a specific Amtelco Secure Messages display name, enter the display name in the Name field.**

## User Name

The User Name field is used to search for messages sent to or from a user's Amtelco Secure Messages username.

**To search for messages that were sent to or from a specific Amtelco Secure Messages username, enter the user name in the User Name field.**

## Role

The Role field is used with the optional Role-Based Messaging feature to search for messages sent to or from a specific role.

**To search for messages that were sent to or from a specific Amtelco Secure Messages role, type the name of the role into the Role field.**

## Start Date

The Amtelco Secure Messages Archive Retrieval utility returns messages that were taken within a specified date range. The Start Date indicates the oldest send date to include in the search.

**Click the Calendar icon  and select the oldest message date to include in the search, or type a date into the Start Date field.**

**Note:** The archives are stored in Coordinated Universal Time (UTC), so adjust your Start Date and End Date accordingly.

## End Date

The Amtelco Secure Messages Archive Retrieval utility returns messages that were taken within a specified date range. The End Date indicates the most recent send date to include in the search.

**Click the Calendar icon  and select the most recent message date to include in the search, or type a date into the End Date field.**

## Subject

The subject field is used to search for messages containing specific text in the subject of the messages.

**To search for specific text in the subject of the messages, type the search text into the Subject field.**

## Message Contents


The Message Contents field is used to search for messages containing specific text in the body of the messages.

To search for specific text in the body of the messages, type the search text into the Message Contents field.

### Group ID


The Group ID field is used to search for messages that were sent to or from users that belong to a specific group.

To search for messages that were sent to or from users that belong to a specific group, type the group number of the group into the Group ID field.

When you have finished specifying the search parameters, click the Search button or the Go icon. 

The progress of the search is displayed in the status bar at the bottom of the Amtelco Secure Messages Archive Retrieval window.

When the search is complete, the Archive Search Results window is displayed.

**Note:** To quickly clear the Name, User Name, Subject, Message Contents, Role, and Group ID, search parameters in order to perform a different search, click the Clear Search Criteria icon.  Archive Search Results

Amtelco Secure Messages Archive Search Results			
Secure Messages		Archive Search Results	
Filter:((Name=Alan Caspar) AND (Taken between 04/25/2024 00:00:00 and 05/25/2024 00:00:00) AND (Group=3))			
Subject	Names	Role	Group ID
Location	Alan Caspar, Ryan Sauter		
Consult	Alan Caspar, Andrea Ward, Ryan Sauter		3
Postponed	Alan Caspar, Ryan Sauter		3
Kidney transplant	Alan Caspar, Andrea Ward, David Darcy	Attending Physician	3
Status request	Alan Caspar, Ryan Sauter		3
Propententinol	Alan Caspar, Ryan Sauter		3
Emergency	Alan Caspar, Ryan Sauter	Attending Physician	3
High Priority!	Alan Caspar, Ryan Sauter		3
Thanks	Alan Caspar, Ryan Sauter		3
Consult	Alan Caspar, Andrea Ward, David Darcy		3
feeling better	Alan Caspar, Ryan Sauter		3
strange	Alan Caspar, David Darcy, Ryan Sauter		3
Forwarding	Alan Caspar, Andrea Ward, David Darcy, James Thom..	Attending Physician, Resident Physician	3
Suggestions	Alan Caspar, Andrea Ward, David Darcy, James Thom..	Attending Physician, Resident Physician	3
Please Respond	Alan Caspar, David Darcy		3
Please check in with	IS Contact, Michael Allen, Alan Caspar		3
Effects	IS Contact, Alan Caspar		3
Please enter your time	IS Contact, Alan Caspar		3
Surgery	Alan Caspar, Andrea Ward, David Darcy		3
Surgery	Alan Caspar, Andrea Ward, David Darcy		3
Patient update	Alan Caspar, Andrea Ward		3
thank you	Alan Caspar, Andrea Ward, David Darcy		3
Fwd: pt	Alan Caspar, Andrea Ward, David Darcy		3
Thanks	John Smith, Alan Caspar, Andrea Ward, David Darcy		3
emergency room 222	John Smith, Alan Caspar, Andrea Ward, David Darcy		3

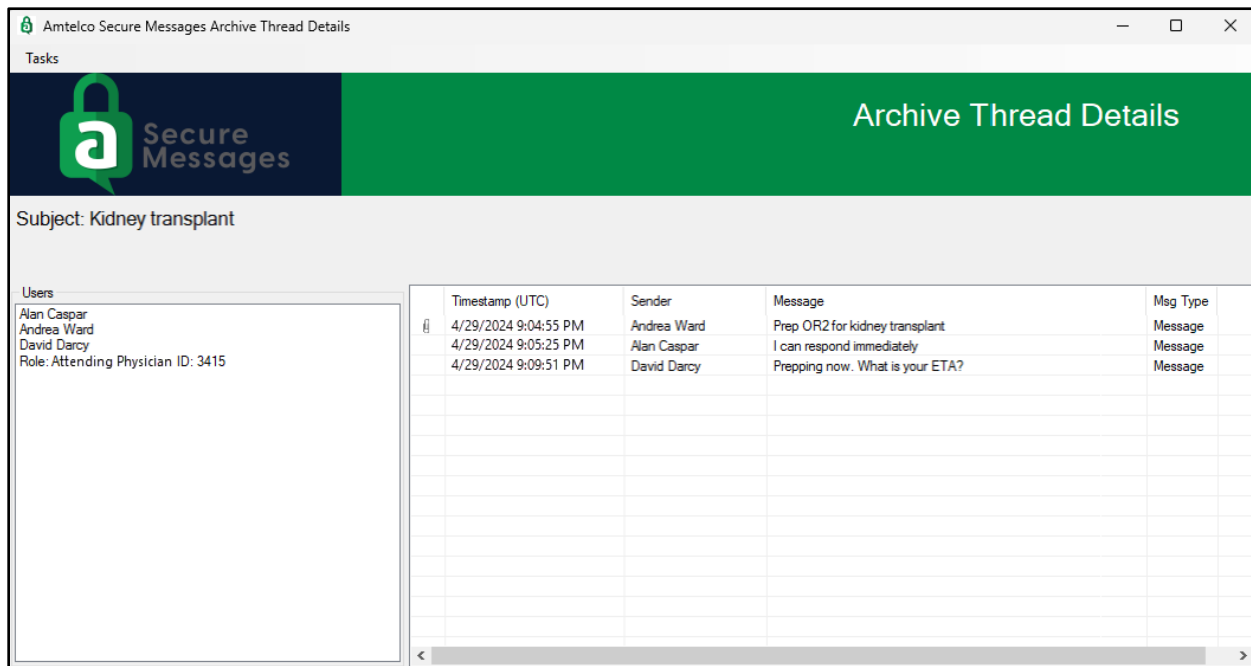
The Archive Search Results window displays information about all messages threads that match the search criteria.


Column	Description
<b>Subject</b>	The Subject column displays the message subject of the message thread.
<b>Names</b>	The Names column displays the names of the users included in the message thread.
<b>Role</b>	The Roles column displays the names of the roles included in the message thread.
<b>Group ID</b>	The Group ID column displays the group number of the group the message thread is associated with.

To display the contents of a message thread, double-click the corresponding entry in the Archive Search Results window.

The Archive Thread Details window is displayed.

### Archive Thread Details



The Archive Thread Details window displays the messages contained in the selected thread. The Users pane on the left displays the display names of the users, role names, and role ID numbers associated with the thread. The table on the right displays information about each message in the thread. A paper clip icon  is displayed in the first column for messages that have one or more attachments.

Column	Description
<b>Timestamp (UTC)</b>	The Timestamp (UTC) column displays the date and time in Coordinated Universal Time (UTC) that the message was sent.
<b>Sender</b>	The Sender column displays the display name of the user that sent the message.
<b>Message</b>	The Message column displays the message content.
<b>Msg Type</b>	The Msg Type column indicates the type of message that was sent. “Message” indicates a standard secure message. “Away Message” indicates an away message. “Notification Result” indicates a system message indicating the results of message notification attempts.

To view detailed information of a message, double-click the row of the table that corresponds to that message.

The Message Details window is displayed.

## Exporting a Message Thread

To export the message thread to a text file, open the Tasks menu and select the Save command.

The Save ASM Message Summary window is displayed.

Browse to the location where you want to save the file.

Type the desired file name in the File Name field.

Click the Save button.

The message thread information is saved to the location specified in a file with the file name indicated and the txt file extension.

## Message Details

Message Details  
Kidney Transplant

Message  
Prep OR2 for kidney transplant.

Attachments (0)  
Name  
Day3.jpg

Contact Name	User Name	Read	Delivered	Deleted	Completed	Role	Role ID
Andrea Ward	award	Not read	Not delivered		Not completed		
Alan Caspar	acaspar	4/29/2024 9:05:07 PM	Not delivered	Not deleted	Not completed		
David Darcy	ddarcy	4/29/2024 9:06:43 PM	Not delivered	Not deleted	5/10/2024 9:09:17 PM	Attending Physician	3415

The Message Details window displays detailed information about the selected message. The Message page on the left displays the content of the message. The Attachments pane on the right displays the file names of any attachments. The table at the bottom of the Message Details window displays information about each message interaction. Dates and times are displayed in Coordinated Universal Time (UTC).

Column	Description
<b>Contact Name</b>	The Contact Name column displays the display name of the user.
<b>User Name</b>	The User Name column displays the Amtelco Secure Messages username of the user.
<b>Read</b>	The Read column displays the date and time that the message was displayed on the user's device. "Not read" indicates that the message was not displayed on the device.
<b>Delivered</b>	The Delivered column displays the date and time that the message was downloaded to the user's device. "Not delivered" indicates that the message was not downloaded to the device.
<b>Deleted</b>	The Deleted column displays the date and time that the message was deleted by the user. "Not deleted" indicates that the user has not deleted the message.
<b>Completed</b>	The Completed column displays the date and time that the message was marked as completed by the user. "Not completed" indicates that the user has not marked the message as completed.
<b>Role</b>	The Role column displays the name of the role the user was filling at the time of the message interaction.
<b>Role ID</b>	The Role ID column displays the role number of the role the user was filling at the time of the message interaction.

## Downloading Attachments

The file names of attachments are displayed in an Attachments pane in the Message Details window.

**To extract an attachment, double-click the file name of the attachment, or right-click the file name to display a menu and then click the Save command.**

The Save Amtelco Secure Messages Archived Attachment window is displayed.

**Navigate to the location where you want to save the attachment.**

**In the File Name field, type the name that you want to use as the file name.**

**Click the Save button.**

The attachment is saved to the specified file location.