Email Archiving Service - Service Description
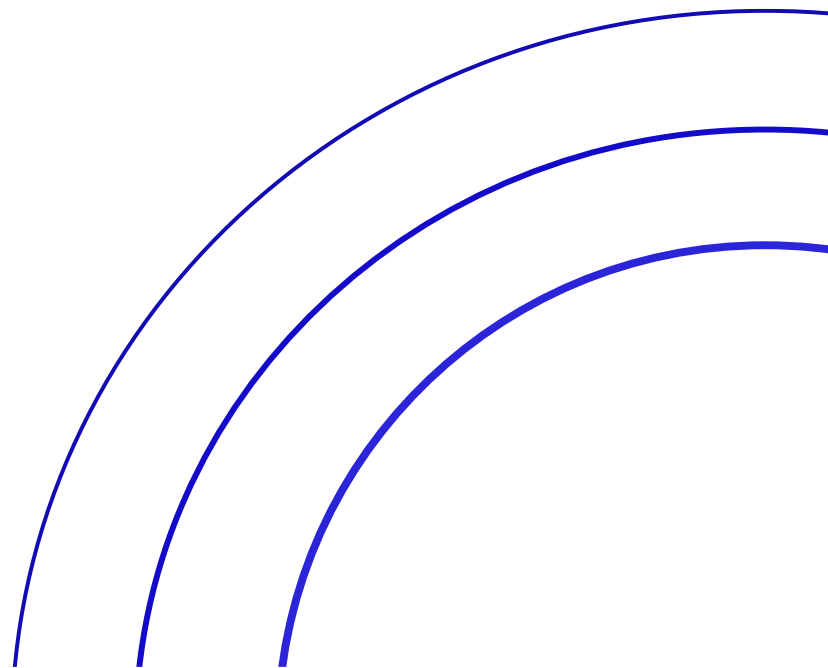
TITLE:	Email Archiving Service - Service Description	DOCUMENT REF NO:	QMS REC170
DESCRIPTION:	This document defines the services provided by Calligo's Email Archiving Service		
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DOCUMENT OWNER & APPROVAL

The VP, Cloud Operations, is the owner of this document and is responsible for ensuring that this service description is reviewed in line with the review requirements of Calligo's Information Security Management System, Project Management Frameworks as well as the guidance and requirements of the CSSF.

Approved by the Chief Operating Officer, Calligo ("Entity") on 28 September 2023

CHANGE HISTORY RECORD

VERSION	DESCRIPTION OF CHANGE	AUTHOR	APPROVAL	DATE OF ISSUE
1.0	Initial Issue	VP, Cloud Operations	COO	28/09/23
1.1	Updated title and optional services formatting	VP, Cloud Operations	COO	05/10/23

Contents

1. Service Overview

This document defines the services provided by Calligo's Email Archiving Service. The Email Archiving Service is one of a suite of services within the Calligo Operating Model.

2. Service Inclusions

2.1. CO-ITSM-EMAILARCH

This service leverages backup tooling to provide Email Archiving service.

2.2. CO-ITSM-SD

This service leverages an ITSM platform and trained Level 1 Service Desk Analysts to cover activities that provide a client facing Service Desk.

3. Service Provisions

3.1. CO-ITSM-EMAILARCH

3.1.1. Inclusions

CO-ITSM-EMAILARCH	
Scope Item	**Description**
Office 365 Integration including Group Synchronization	Linking M365 with Cloud Archiving Service
User Administration	Setup Permission Roles – Admin, Auditor, User
Exchange Integration	Configure Non-Email Sync and Folder Sync to archive non-email related items
Retention	Configure Retention Policy as per Customer Requirements
Support of Microsoft Outlook Add-in	Users Support for installation of Microsoft add-in to enable email archive search via Outlook
Alerting for Non-Email Sync and Folder Sync	Alerts for failure of sync jobs

3.1.2. Exclusions

CO-ITSM-EMAILARCH	
Exclusion Item	**Description**

Retrieval and Search within the archive	The retrieval and search across archived emails will be the responsibility of the assigned client Admin. In the absence of a client Admin, this will be chargeable work based on time and materials.

3.2. CO-ITSM-SD

3.2.1. Inclusions

CO-ITSM-SD	
Scope Item	**Description**
Access to the Calligo ITSM platform	24/7 access to the Calligo ITSM platform that provides capabilities for clients to raise new support tickets and to access open or historic support tickets.
Telephone Support	Access to the Calligo Service Desk via the issued telephone contact numbers during regional Business Hours only.
First Line Fix	Access to the Calligo L1 Service Desk Analysts for first line fix or resolution.

3.2.2. Exclusions

CO-ITSM-SD	
Exclusion Item	**Description**
24/7 Telephone Support	This is a chargeable addition.
Onsite support	All support delivered via the Service Desk offering is remote.

4. Roles and Responsibilities

The table below provides a responsibility matrix for the core Email Archiving Service elements:

Service Activities – Core Elements	Calligo	Customer
CO-ITSM-EMAILARCH		
Client Admin assignment	R, A	A, C, I
Retention policy amendment requests	C, I	R, A
Add/Update/Change User Permission	C, I	R, A
Monitoring of the daily sync and resolution of issues	R, A	I
Installation of Microsoft Outlook Add-in	C, I	R, A
CO-ITSM-SD		
Raising support requests	R	R, A
Contacting Calligo Service Desk via telephone for P1 Support Requests	I	R, A
Correctly assigned the right category and priority to all incoming support requests	R, A	C, I

Providing full and detailed information when creating new support requests		I	R, A
Providing detailed and regular ticket updates		R, A	I
Responding to all ticket updates where additional information or testing is requested from Calligo Service Desk		I	R, A
Providing prompt confirmation of ticket closure agreements.		I	R, A

R=Responsible, A=Accountable, C=Consulted, I=Informed

5. Reporting

The table below provides details on the additional Monthly Reporting and Analytics for Email Archiving Service that are included in the core service:

Service Item	Reporting Item	Description	Frequency
CO-ITSM-EMAILARCH	Audit Log Report	Providing Audit log of activity on Archiving system	On Request

6. Data Residency

Calligo Data Residency

7. Service Requirements

Service Item	Requirements Item
CO-ITSM-EMAILARCH	Customer should have an active M365 Tenancy with Emails
CO-ITSM-SD	Client is provided information on support access methods
CO-ITSM-SD	All Priority 1 incidents are logged, and the client must follow up with a telephone call into support.

8. Access Requirements

Requirements Item
Access to M365 Exchange with administrative privileges

9. Support Locations

Calligo Support Locations

10. Service Catalogue Request Items

Catalogue Item	Fulfilment Time	Qualifying Criteria	Included Requests
Add/Update/Change User Permission	24BHR	User requires access to search additional mailboxes or Admin permissions	On Request
Retention Policy Change	24BHR	Organisation requires email archive retention changes	On Request

11. Standard SLO's

Service-Level-Agreement.pdf (calligo.io)

12. Related Documents

Any clients onboarding to Calligo will require the following document as an introduction to service:

Calligo – Welcome to Support for Clients

13. Optional Services

In addition to the Email Archiving Service, Calligo can provide the following service items as optional add on services for the Email Archiving Service:

13.1. Service Delivery Manager

This element of the service leverages an experienced Calligo Service Delivery Manager to assist with service management requests, reporting, escalations and technical advice and guidance as needed.
Service Element Scope

SCOPE ITEM	DESCRIPTION
Service Review Meetings	Regular meetings between the key stakeholders for the client and Calligo Service Delivery Managers to review an agreed set agenda, including Service Performance, Project Updates, Calligo Company Updates.
Service Reporting	Regular reports covering support ticket summary and performance against Service Levels, Availability and Capacity management (where applicable), Operations Management performance against Service Level Objectives.
Technical guidance	Access to business hours technical guidance and support to ensure customer's success, bringing Calligo's best ideas, standards, innovations, and capabilities to customers to drive maximum business value. Educate Calligo clients on how existing and new product features and functionality work, and how it can contribute to their business growth

Escalation contact	Calligo point of contact during Business hours for support requests and accounts escalations.

Service Provision Excludes

EXCLUSION ITEM	DESCRIPTION
24/7	Access to Service Delivery Managers is during business hours only.

Service Requirements

REQUIREMENTS ITEM
All support tickets are logged via the Calligo ITSM system by clients.
All Service Review reports are generated via Calligo Reporting dashboards
Access to client's key stakeholders and decision makers

Access Requirements

ACCESS REQUIREMENTS
N/A

Data Residency

RESIDENCY ITEM	DESCRIPTION	SYSTEM	STORAGE LOCATION
ITSM Data	ITSM Ticket information and logged attachments	Viaje	London Luxembourg Jersey

Service Catalogue Request Items

CATALOG ITEM	FULFILMENT TIME	QUALIFYING CRITERIA	INCLUDED REQUESTS
Review Meetings	1 Week	No previous review in past month	

Standard Reporting

REPORTING ITEM	DESCRIPTION	FREQUENCY
Service Review Reports	Covering support ticket summary and performance against Service Levels, Availability and Capacity management (where applicable), Operations Management performance against Service Level Objectives.	Monthly generated
Incident Reports	Providing Incident Reports for all major Incidents to outline the root cause and future mitigation to avoid reoccurrence.	For all P1 Incidents impacting the client

RACI Table

SERVICE ACTIVITIES	Calligo	Customer
Producing and delivering Service Reports	A, R	C, I
Scheduling and managing Service Review Meetings	A, R	C, I
Obtaining client feedback on Service levels	A, R	C, I
Providing feedback on Calligo Service levels	C, I	A, R
Providing management and oversight on active client projects	A, R	C, I
Delivery of Incident Reports and post incident review meetings	A, R	C, I

Approval for changes in service scope	C, I	A, R

R=Responsible, A=Accountable, Consulted, I=Informed

13.2. Technical Account Manager

This element of the service leverages an experienced Calligo Technical Account Manager to assist with technical requests, reporting, escalations, and ongoing technical advice to help drive and direct client's strategy and need for information technology.

Service Elements Scope

SCOPE ITEM	DESCRIPTION
Service Review Meetings	Regular meetings between the key stakeholders for the client and Calligo to review an agreed set agenda, including Service Performance, Project Updates, Client IT Strategy roadmap, Calligo Company Updates.
Service Reporting	Regular reports covering support ticket summary and performance against Service Levels, Availability and Capacity management (where applicable), Operations Management performance against Service Level Objectives.
Technical guidance	Access to business hours technical guidance and support to ensure customer's success, bringing Calligo's best ideas, standards, innovations, and capabilities to customers to drive maximum business value. Educate Calligo clients on how existing and new product features and functionality work, and how it can contribute to their business growth.
Escalation contact	Calligo point of contact during Business hours for support requests and account escalations.

Service Provision Excludes

EXCLUSION ITEM	DESCRIPTION
24/7	Access to Technical Account Managers is during Business Hours only as specified in the MSA.
Implementation services	This service does not include activities that would be classified as development or project work.

Service Requirements

REQUIREMENTS ITEM
All support tickets are logged via the Calligo ITSM system by clients.

Access Requirements

REQUIREMENTS ITEM
Administrative access to all assets in scope as required for remediation actions

Data Residency

RESIDENCY ITEM	DESCRIPTION	SYSTEM	STORAGE LOCATION
ITSM Data	ITSM Ticket information and logged attachments	Viaje	London Luxembourg Jersey

Service Catalogue Request Items

CATALOG ITEM	FULFILMENT TIME	QUALIFYING CRITERIA	INCLUDED REQUESTS
Not applicable			

Standard Reporting

REPORTING ITEM	DESCRIPTION	FREQUENCY
Incident Reports	Providing Incident Reports for all major Incidents to outline the root cause and future mitigation to avoid reoccurrence.	For all P1 Incidents impacting the client

RACI Table

SERVICE ACTIVITIES	Calligo	Customer
Producing and delivering Incident Reports and post incident review	A, R	I
Scheduling and managing technical roadmap Review Meetings	A, R	C, I
Obtaining client feedback on Service levels and Performance	A, R	C
Providing feedback on Calligo Service levels and Performance	I	A, R
Providing technical oversight on active client projects within scope	A, R	C, I
Approval for changes in service scope	C, I	A, R

R=Responsible, A=Accountable, Consulted, I=Informed

14. Auxiliary Services

14.1. Service Onboarding & Transition

To launch Email Archiving Service successfully, service design, onboarding and transition will be required to prepare and test both the environment and the managed services processes. Calligo will undertake several workshops to discuss and confirm each element of the service to ensure all parties are aware of roles and responsibilities in advance of service launch.

Service transition and onboarding covers areas such as ticket management setup, platform readiness with knowledge share, and finalising all ITIL practices. A test and acceptance criteria are captured and signed off, to allow for the Email Archiving Service to commence.

After service launch, Calligo uses a formal service transition framework as the basis to carry out acceptance into service procedures, for new services landing into managed services. We typically engage at the initial stages of a project to ensure service operation adoption and readiness is planned and carried out correctly. This materializes as follows:

- To review designs, build and test artefacts to ensure supportability.
- Attend change review boards to gain early sight of changes by way of knowledge acquisition.
- To witness and validate designs and builds are delivered as proposed and intended.
- Complete operational into service documentation, training, and runbook enablement, which is required as part of the service hand-over.

14.2. Change Request and Change Control Process:

All infrastructure changes introducing risk to the environment will require change control which includes, but not limited to, Microsoft Security Patching, Infrastructure Upgrades, Deployments, Configuration Item status change. This can be generated from maintenance or an event such as an upgrade required on the system released by Third Party vendors, requested by the customer, or from a monthly release of security patches.

Where possible Standard Changes will be used with minimal risk, repeatable implementation steps, and prior approval from the customer in the form of an email.

An Emergency, or unplanned, change process will be raised to resolve a Priority 1 or 2 incident or to implement an emergency Security Patch. This accelerates the time to implement and resolve.

All Requests for Change will be reviewed internally, assessed internally, and authorized or rejected through Calligo ITSM tool.