INSIDE

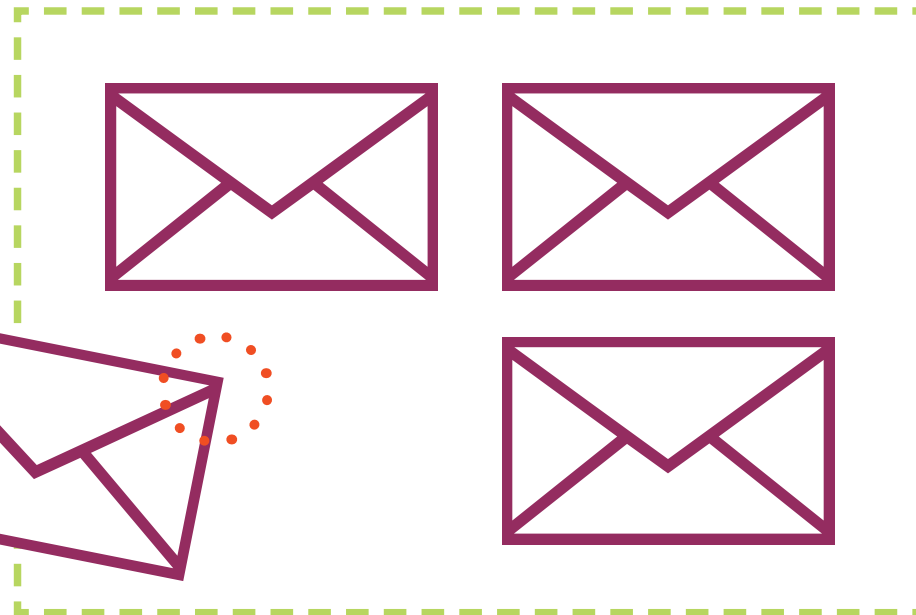**EMAIL ARCHIVING**
Planning, policies and product selection

CHAPTER ☐4 **Improving storage management and user productivity with email archiving**

Email archiving can enhance storage management and user productivity — you just have to pick a product that offers the right features.

CHAPTER 4 Improving storage management and user productivity with email archiving

*by Marion Weiler
and Kathryn Hilton*

ACED WITH THE NEED to delete email from network servers in response to IT-imposed mail quotas, employees often must move their messages to local storage. They're then forced to manage the size of those local email archives, assure that the local archives are adequately backed up and perhaps even perform backups themselves. Storage management and user productivity issues soon follow.

An email-archiving system can improve productivity by offloading the need for users to manage their own email storage and archiving. By accomplishing that goal, it can also prevent the need for server mailbox quotas or auto-deletion policies.

When evaluating an email-archiving product's ability to improve storage management and user productivity, you must first define the company's email-retention goals and policies. You can then more easily determine which features will be needed to meet corporate requirements.
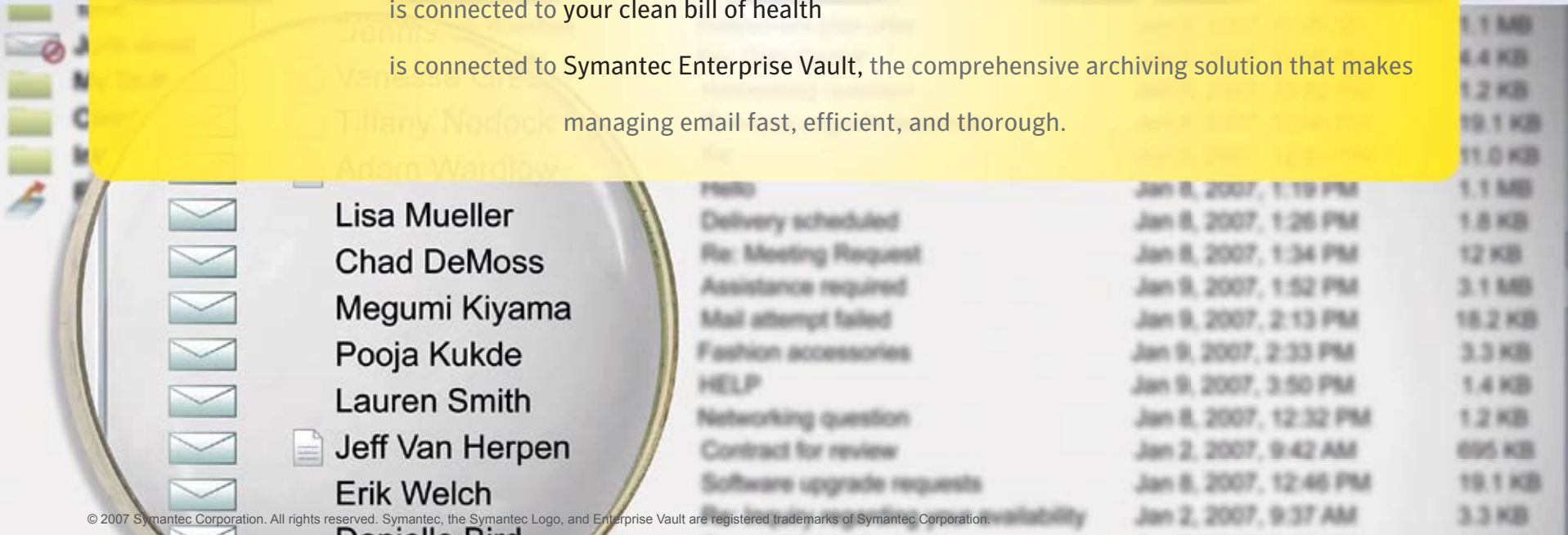
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The legal investigation is connected to the discovery request

is connected to combing through terabytes of archived email

is connected to your clean bill of health

is connected to Symantec Enterprise Vault, the comprehensive archiving solution that makes

managing email fast, efficient, and thorough.

Lisa Mueller
Chad DeMoss
Megumi Kiyama
Pooja Kukde
Lauren Smith
Jeff Van Herpen
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Hello Jan 8, 2007, 1:19 PM 1.1 MB
Delivery scheduled Jan 8, 2007, 1:26 PM 1.8 KB
Re: Meeting Request Jan 8, 2007, 1:34 PM 12 KB
Assistance required Jan 9, 2007, 1:52 PM 3.1 MB
Mail attempt failed Jan 9, 2007, 2:13 PM 18.2 KB
Fashion accessories Jan 9, 2007, 2:33 PM 3.3 KB
HELP Jan 9, 2007, 3:50 PM 1.4 KB
Networking question Jan 8, 2007, 12:32 PM 1.2 KB
Contract for review Jan 2, 2007, 9:42 AM 695 KB
Software upgrade requests Jan 8, 2007, 12:46 PM 19.1 KB
Jan 2, 2007, 9:37 AM 3.3 KB

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*In "*CHAPTER 3*: Choosing email-archiving product features for compliance and risk reduction," we reviewed how an email-archiving product can save time during litigation discovery.* CHAPTER 4 *provides an overview of how to identify the email-archiving product features that boost user productivity and provide storage management efficiency.*

KEY POINTS IN THIS CHAPTER INCLUDE:

- **Understanding everyday essential email-archiving functionality requirements**
- **Considering the impact of email client integration**
- **Identifying features that specifically address user productivity and storage management**

What is the goal of email archiving?

When considering whether to implement an email-archiving system, companies generally are doing so to achieve one, or both, of the following goals:

1. RISK REDUCTION: Maintain an email archive that can be used to address your company's regulatory compliance needs and litigation risk management. The archive will provide a secure, authentic, searchable archive of your company's email that can be used for discovery and document production in response to a variety of regulatory needs and litigation.

2. USER MAILBOX MANAGEMENT: Provide users with a managed email archive service that gives them an "infinite mailbox" with unlimited email storage, relieving them of email data storage issues and providing the IT department with better storage and email server management.

While offloading storage management responsibilities, also make sure users can continue to interact with their email in the same way or in a way that is better than before. Make sure that no additional work is added to the process.

If the goal is primarily user mailbox management, focus on an email-archiving tool that provides the necessary level of desktop integration—one that focuses heavily on user features. If user mailbox management and offloading storage management are equally important, you'll need a more full-featured email archive that supports both goals.

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Ubiquitous email-archiving functional requirements

When considering an email-archiving system, there are a number of product features that are usually on every company's feature list. Common high-level functionality you need in any email-archiving product includes the ability to:

- Capture email messages from the email server.
- Remove email messages from the email server.
- Store email messages.
- Secure the archive.
- Manage user archive accounts.
- Search the archive.
- Retrieve email.
- Maintain performance as usage increases.
- Report usage and metrics about the archive.
- Dispose of email from the archive after a specified period of time.

Improving mailbox management, storage management and user productivity may also require:

- Integration with the desktop email client, such as the ability of users to continue to access archived items directly from their email client interface, rather than having to switch to a different interface such as a Web browser.
- Manual or automatic capture of historic email in personal storage on network servers or C drives.
- Maintenance of granular access controls on the stored data to allow individual users access to their own archived items.
- Maintenance of the user email mailbox folder structure in the archive for easy navigation of users' archived items.

When thinking about exactly how these features are implemented, also consider a more granular set of required features that define how the general feature is implemented. For instance, when

mailbox management is an additional goal to compliance, most organizations will not go with hosted solutions, which are focused primarily on capturing copies of all email sent and received in response to regulatory or legal requests. But in-house and hybrid systems each provide for mailbox management.

> When mailbox management is an additional goal to email compliance, most organizations will not go with a hosted solution.

Email client integration considerations

Several alternative architectures also offer desktop email client integration that is tightly integrated with the email environment. Descriptions and definitions of hosted, in-house and hybrid architectural solutions can be found in Chapter 3.

THE PRIMARY METHODS FOR DESKTOP INTEGRATION INCLUDE THE FOLLOWING:

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① **"Stubbed items," or those items that have been moved to the archive but retain a pointer or "stub" to it in the email server. Stubbed items are retrieved directly from the archive when accessed by the email client. This may have little or no impact on the email server but will require the installation and support of more software on user desktops.**

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② **When accessed, stubbed items are restored to the email server first and then presented in normal fashion from the email server to the email client. This has little impact on the email client but could affect email server performance, because the more transactions there are to process, the more server storage space is required to handle restored items.**

When considering these alternative implementations, refine your email-archiving product requirements to include statements, such as "minimize impact on the email client" or "minimize impact on the email server." Having more software installed on the desk-

top email client can result in a richer, more robust user experience—but at the cost of supporting more desktop software installations, user training and other IT support services.

Minimizing changes to user desktops reduces user training and support requirements, but installing modifications to the email server may affect email service levels. Your company may place a high priority on not modifying email service levels, so weigh priorities before deciding what email-archiving feature requirements are important.

> **+ The more transactions there are to process, the more server storage space is required to handle restored items.**

User productivity feature specifications

*For better user productivity,
an email-archiving product should also be able to:*

➜ Capture the email according to policy:
- Automatically capture all email sent and received, or
- Automatically capture email after a retention decision has been made, usually by capturing only email that has not been manually deleted after a certain period of time, such as 30 days.

➜ Automatically delete the body of the email from the server after a specified period of time in the process, which is sometimes referred to as "stubbing."

➜ Stub email items by other criteria aside from age
- Automatically by size of email message with attachments, or
- On demand by user.

➜ Stub only the attachment, but leave the text portion of the message on the email server to allow using the normal email search interface. Recognize that attachments consume the most space on the server, and there are great savings archiving them.

➜ Create a link—stub or tombstone—from the email system to the archive so that users can retrieve the archived email item by using their normal email client interface.

➔ Provide a tool in the email user interface that provides a direct link to the email archive search engine.

➔ Provide a feature that easily restores an item from the archive back into the email system for typical email functions such as Reply or Forward without having to cut and paste.

➔ Provide the ability to tag email items with retention meta-data, such as record type, retention periods or other meta-data useful in the retention management of the email item where exceptions to the normal defaults apply.

➔ Provide a method to support offline users who will need local access to email items when traveling.

➔ Provide a user interface to the archive, based on a Web browser or a proprietary interface.

➔ Maintain original access controls for the email system. For example, make sure users can see only their own email and no one else's.

➔ Prevent users from deleting or modifying items in the email archive.

➔ Offer an intuitive but robust search engine for finding items in the archive, including search features such as keyword, Boolean, substring, highlighting and search term hits.

➔ Perform stored searches that allow search criteria to be stored as a user named-search so the user does not need to recreate the same search criteria for repetitive searches.

➔ Maintain a user's email mailbox folder structure in the archive.

As always, developing both requirements and features should involve various groups within the company that have a stake in the solution. This includes the IT department, which must install and support the product, and the business units that are the primary customers of the mailbox management features. It should also involve the legal and compliance groups, which in many cases are the primary driving force behind an email-archiving project.

Whether your company is using email archiving for compliance and risk reduction or user productivity and storage management—or all of the above—a thoughtful approach to developing your requirements and desired features will help ensure a successful project.

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All content and no discovery?

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About the authors

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Additional resources from Symantec

Learn more about Symantec Enterprise Vault

Symantec Enterprise Vault 2007 provides a software-based intelligent archiving platform that stores, manages and enables discovery of corporate data from email systems, file server environments, instant messaging platforms and content management and collaboration systems.

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