

■ Email Archiving

Email has become a central part of every businesses' operations. Even phone calls are becoming mere first steps as many people state, "Just send it to me in an email so I have a record of it." Maintaining a record of our communications is essential nowadays and while email is convenient and quick, keeping those records safe and accessible is a number one priority. There are two ways to maintain a record of your email communications: backups and archiving. We'll discuss both in this newsletter.

Backups

The main differences between creating a backup of your data and archiving your data is what data is retained and the timeframe the data is kept. If the email is not deleted and is included in the backup, you'll have access to it for however long you keep the backup and don't overwrite the backup data.

■ Tip of the Month

Have you ever received an email without a subject or was the subject so un-descriptive that it was pointless to save it?

If you need to keep the email, then edit the subject line so it will make it easier to trace in the future.

1. In Outlook, open the message by double clicking it. You can't edit the subject line in preview mode.
2. Highlight the text in the Subject field or put your cursor next to Subject:
3. Start typing. When you have added or edited the text in the subject area, click File - Save. Then close the email.
4. When you return to the Inbox, you'll see your newly edited Subject line.

In general, backups are used for disaster recovery so if you accidentally delete a file, you should have quick access to it without much downtime.

Methods for backing up your data include: tape drives, internal or external hard drives, CDs or DVDs, flash drives and online backups. Some methods are more appropriate depending on the size of your data. For instance, businesses generally have much larger data stores so they would need a tape drive or hard drive while consumers can use flash drives.

Archiving

Archiving, on the other hand, is used primarily for data retention and discovery over long periods of time. Archiving is useful for businesses who want to maintain a record of their activities even though projects may no longer be current or to comply with governmental regulations.

Whereas data backups require quick access, archived data places an emphasis on performance, i.e., will I be able to store this data for 20 years and will it still be readable after that much time? Creating two systems for backing up your data and archiving your data will ensure that your business' email communications work smoothly and efficiently.

Archiving data uses similar methods as backups including hard drives and tape drives. Hosted or online archiving is also possible now that cloud storage is becoming more mainstream.

■ Website Worth Watching

- ▶ www.paturnpike.com/triptalk/ - Hands-free Smartphone app for automatic notification of travel alerts on the PA Turnpike. Get accident and construction alerts before you reach an area of congestion. The app is free and no registration is required.

Reasons for Archiving Email Data

So why should you archive your email data?

- 1) Internal storage requirements and performance - Small businesses, in particular, cannot afford production servers capable of housing years and decades of email data. Archiving provides a simple, searchable, compressed database that doesn't interfere with production work.
- 2) Legal - Disgruntled employees and customers can wreak havoc on a business. Archiving email ensures you maintain a paper trail for any legal actions taken.
- 3) Regulations - Many government agencies such as

the Dept of Defense and the FDA require that personal information be stored for a specific length of time. HIPAA (healthcare) regulations also require many industries to maintain safe recordkeeping practices. Non-compliance can elicit hefty fines. Creating an email archive system will ensure that regulations are satisfied and data is retained for the necessary time period.

- 4) Eliminate user errors - Relying on users to manually archive their email is an accident waiting to happen. Creating an automatic system that archives email ensures compliance and reliability that the data will be saved and accessible.

Archiving Methods

There are three approaches to archiving data:

- 1) hardware solutions, 2) software solutions, and 3) third party ASP hosted solutions (online). Briefly, hardware appliances can be customized to your network for a perfect fit or purchased as a plug-n-play device that requires minimal technical installation. Software archiving is popular and offers flexibility for a changing business environment. Online archiving doesn't require upfront costs and offers conveniences for many. Several factors affect which option you choose such as the size of the organization, the data storage requirements and your budget.

Hardware Appliances

Email archive appliances (*Figure 1*) sit inside your network, capture and compress messages, then store the data on hard disks and/or tape drives. Many appliances enable multiple email servers to be connected simultaneously allowing the removal of duplicate emails and providing a single store for searching and retrieving all emails that enter the organization.



Figure 1. Barracuda Networks Message Archiver appliance - rack mounted version.

Email archive appliances are generally plug-n-play allowing IT staff and end users to share responsibility. While IT staff may setup the unit, create reports and conduct general maintenance tasks, users have the ability to access their archive, and search and retrieve emails from their desks. The best products will have MS Outlook connectivity and/or a web browser interface for simplified access. Another feature to look for is the ability to search not only the message data but the meta-data as well (including message headers). Many appliances prevent the deletion of emails ensuring compliance standards are maintained (records will indicate that a message was or was not received without any doubts).

Archive appliances are available with a range of storage space from 500GB to 16TB. Most are considered all-in-one devices including software, operating system, RAID disk management, and database functions eliminating the need for purchasing extra servers and / or software. Some offer battery backup units preventing unscheduled shutdowns. The largest obstacle for many is the upfront cost of a dedicated appliance. Space requirements may also be a factor in deciding whether your organization can accommodate another device.

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Archiving Methods ... continued

Software Solutions

If a hardware solution is outside of your budget, you can use software for email archiving instead. There are many options available from using the Journaling feature within Microsoft Exchange to third party products that integrate with MS Exchange, Lotus Notes and many other email programs. As a sign of the changing times, some software products now allow you to archive social networking interactions as well as traditional email exchanges.

MS Exchange

If you are already running MS Exchange for your email processing, all versions from Server 2000 - 2010 offer email archiving functions. Exchange Server 2003 and prior versions offer basic email archiving through Message Journaling. This component saves all emails sent and received from selected users and allows you to customize each mailbox. For instance, you can select certain folders to archive, set storage limits, set the timeframe for storing emails and choose who can review the archive. The biggest obstacle with Message Journaling is that the Exchange Server must process both the general email functions as well as the archiving functions. This degrades performance and can affect productivity over time.

MS Exchange Server 2007 and 2010 introduced many new features for email archiving, e-discovery and retention policies. Some highlights include:

- the ability to assign rules to messages for how they are archived,
- performance enhancing features to reduce the load on the processor,
- allowing larger mailboxes,
- retention policies that can be set to automatically move or delete emails after a certain timeframe,
- a multi-Mailbox search feature that can be accessed over the web. This feature allows users to access and conduct keyword searches of their folders/mailboxes from any computer on which they have Internet access.

For all versions of MS Exchange, issues may arise with storing archive data within the same Exchange environment. If something happens to the Exchange environment, then both the production email and archive data are at risk.

Third Party Solutions

Software

If you use MS Exchange but are looking for a third party solution, there are many options available that integrate with MS Exchange that appear seamless to the user. These software products allow users to access their archive through a folder stored in Outlook, over a web interface, and (in some cases) through a mobile device such as a Smartphone. There are many benefits to using third party software.

1. It will reduce the processing load placed on the Exchange server for archiving tasks, helping to increase Exchange Server efficiency.
2. Mailbox quotas are scalable since the email is not stored on the Exchange Server. Depending on the storage space you have available (supplemental hard drives or network attached storage devices), users may have a near unlimited size mailbox.

Hosted Options

If you would prefer to not purchase, install and maintain archiving software, you may want to consider having a third party company host your archive. As with many other services, an application service provider will store your data off-site, train users and maintain the archive for a monthly fee. Your data is accessible through a web interface.

Hosted options are increasingly becoming popular as they eliminate or reduce many of the initial startup costs as well as the ongoing updating and maintenance tasks. For instance, Microsoft's Exchange Online Archiving costs \$4 per user/month (requires Exchange 2010, Office 365 enrollment and Outlook 2007 or 2010).

Archiving Methods ... continued

One disadvantage to hosted archives is that you are limited by your Internet connection. If your connection is down or if the host is inaccessible, you will not be able to access your archive. Note: Although most reputable companies will ensure at least a 99.9% uptime, there is no guarantee that your archive will be accessible when you need it.

For many businesses, there are certain departments and/or users that are considered more critical. For

these businesses, a hybrid solution may be the best course of action.

Hybrid solutions divide your email data distinctly, whereby critical data is housed on site and lower tiered data is housed in the cloud. Many companies are now offering these solutions as businesses increasingly move data off-site but remain tentative with mission critical applications and data.

Conclusion

There are many benefits to archiving your email as well as conducting regular data backups. While data backups can provide a reliable and quick way to retrieve a file, email data can be problematic especially if you are looking for a particular email sent about 5 or 7 years ago where you don't remember the sender's name. It would take you hours if not days to manually search your data backup (dependent of course on the email not being manually deleted already). Email archiving seeks to remove these headaches by retaining all emails sent and received and deploying a keyword searchable, organized format that administrators and users can access quickly and efficiently.

Some of the more prominent capabilities of an email archiving solution will allow you to:

- capture and retain all emails including attachments for designated retention periods,
- search emails using keyword search,
- meet compliance requirements for Sarbanes-Oxley, HIPPA and other governmental regulations,
- organize email content for quick e-discovery for legal matters,
- reduce email storage and management costs,
- grant access to users to search their own archives on their desktops and mobile devices,
- search archives over a web interface from any computer or Internet connected device.

One of the best features of an email archive solution is that the archives are searchable. Using keyword search, you can input a word or phrase and have results returned instantaneously, in many cases from any computer or Internet connected device. Conversations or strings of emails as well as attachments can also be returned giving you a full scope of the issue if needed.

Data backups generally don't offer this feature so you'll have to remember dates, subjects and sender's names and manually search through files. For most people, remembering a project they worked on 5 years ago is challenging let alone remembering a specific conversation. Archiving takes the guesswork out of remembering specific information related to a task.

Just as with backups, there are many options available to archive your email data to fit any size organization and budget. Give us a call if you need to revamp your company's archive system or would like additional information on getting started.

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