Why You Need
Email Archiving
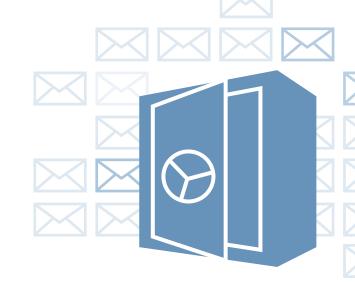
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Introduction

Broadly speaking, an email archive is an indexed, read-only, long term store of every email sent and received by your organization. It is distinct from your regular email database (such as Microsoft Exchange) where users read and manage their day to day emails. Email archiving systems like Exclaimer Mail Archiver provide an archive store plus a mechanism for populating it from your regular mail database and a user interface for searching and accessing the emails held.

Historically, the driver for the adoption of archiving systems has been regulatory compliance and the need for certain classes of organization during key periods to maintain emails so they cannot be deleted or modified by staff. Indeed, much of the information that has come to light as part of recent, high profile, regulatory and legal cases will have been sourced from an email archiving system.

Traditionally, email archiving systems have required dedicated hardware and database platforms that are relatively expensive to buy and require trained staff to deploy and manage over their lifetime. Also, with a compliance focus, access to the archive is only provided to key personnel and external officers with a legal right of access minimizing the potential for broader benefit.

Such factors have largely prevented the widespread adoption of email archiving systems and the realization of the other organizational benefits that they bring, such as:

- The ability for all users to maintain every email they have ever sent or received without compromising the performance of the underlying email platform.
- The ability to perform very high performance searches against an organization's lifetime store of emails using sophisticated queries.
- The ability to easily provide key individuals with controlled and rapid access to emails across all mailboxes.

Exclaimer Mail Archiver is a new product, with a mission to bring the significant benefits of email archiving (beyond simple compliance) to all organizational types and sizes at a much lower cost of ownership than has been previously available.

The rest of this document looks at how the attributes of an email archiving system can provide real organizational benefit across a range of personalities and roles.

The IT Administrator

As an IT administrator, your desire is to maintain a high performing email infrastructure that efficiently sends, receives and stores emails so that end users can perform the day to day operational tasks that now rely on email with the minimum of fuss. You're probably well aware of this already, but if you want to know just how reliant your users are on their email, try taking down your mailbox servers and watch the phone ring.

As well as maintaining your email platform you have a thousand and one other systems and resources to look after. So, it goes without saying, that you want every resource that you are responsible for to be as predictable and easy to manage as possible. You need an email system that keeps running, is easily updatable, easily backed up and so forth.
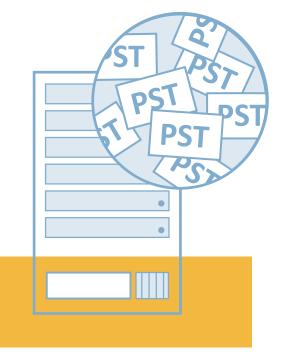
Microsoft Exchange continues to use its own dedicated store – it doesn't use SQL. In fact, when our development guys met with the Exchange team at the launch of Exchange 2007, they told them that every so often Microsoft initiate a project to back Exchange stores on SQL Server. The project always fails because Exchange has different needs than SQL.

Exchange is optimized to generate the standard Outlook view as quickly as possible. It needs to do that whether users have 100 or 100,000 emails in their inbox. Exchange stores also operate on a hierarchy (mailboxes, folders etc.) and enforce security at each level whilst also providing rapid receipt and delivery of new email. This is fundamentally why Exchange Stores do not make for a good long term archive but it's also the reason why you, as an IT admin, would benefit from deploying an email archiving solution.

Exchange stores work best when they're kept small and depending upon your version and license level, the overall size of your store is actually physically constrained by Exchange itself. But your users are getting more and more emails and they're very reluctant to delete them. So, to maintain a manageable Exchange store, you enforce a mailbox size restriction but then your users call you up and complain they can't keep all their email. Or maybe, you would be happy to let them have more space but there's some other constraint at work – like you're running out of resources and can't upgrade your storage solution right now.

So, either you, or your users turn to PST files as a mailbox extension mechanism. There are a few reasons why this is a bad idea:

- If PST files are stored on a local machine, you can't enforce storage quotas, the user can only see them in Outlook on that computer and you'll need to develop a backup strategy.
- If you develop a backup strategy, you'll probably run into usage/locking problems – a PST if a file and not a database.
- If you put PST files on a network share, you'll run into performance problems and Microsoft won't support you.
- There's a chance of PST files being stolen from laptops.
- There is a size limit on PSTs which leads to users building a chain of the things.
- Outlook functionality such as search won't work across multiple PSTs.
- PST files have a reputation for corruption – which may or may not be recoverable.

Exchange 2010 introduced the idea of the personal archive which basically gives users two mailboxes. While this alleviates many PST issues, there are drawbacks:

- Everything is still in Exchange and optimized for Outlook access rather than search-based access. You just have two places where an email might be.
- Manual movement is required when quotas are exceeded– since automation policies are only retention-based.
- There's no compliancy enforcement – users can still delete emails.
- There's no access via ActiveSync devices.
- You'll need Office Professional Plus and Exchange Enterprise CALs.

Deploying our email archiving solution lets you enforce the quotas that you need to maintain system performance, ease of management and resource utilisation without compromising your end user's email usage:

- All email gets stored in the archive so users have a single place to go look for an historical email.
- When they find the email they're looking for, it's a simple operation to restore it to their mailbox.
- The archive is designed to expand easily across multiple storage devices, including the cloud, so it grows with your needs and can be configured to make best use of your resources.
- All your PSTs and existing mail can be pulled into the archive using a dedicated tool that we supply.
- The archive store is based upon flat files held in a folder structure making tasks such as security management and backup as simple as possible.

The Email User

When you use email, your primary focus is on the mails you can see right now in your inbox view. So, you use email in a very transactional way. You receive email, you read it, you action it, you reply, you delete it, or you put it some place in your folder hierarchy in case you need it in the future. And over time, your mailbox grows and grows and it becomes harder and harder to find that critical email from 6 months ago where somebody promised something but still hasn't delivered.

Searching Outlook/Exchange is slow and unnatural because it is peripheral to the hierarchical list based presentation necessary for transactional operation. When you're looking for email, what you need is a Google like interface that takes you straight to the email you're looking for. Oftentimes, this is about refinement – you start off searching for an email from somebody. Then you discover they've sent you a few hundred in the last year, so you remember that they sent it in April getting you down to 40 or 50 and then you remember some keyword that uniquely defines the conversation.

In order for this process to operate efficiently, you need rapid searching across every email you ever sent or received and an interface dedicated to search refinement. Outlook doesn't give you that. And if you have an extensive set of folders for organizing your email then you'll have to remember the folder you put the email in or face a long wait as Outlook looks through every folder in your mailbox.

What happens if you deleted the email? There's no way Outlook will find that. An email archive is a secure resource for the end user. Rapid, search-based access to everything they ever sent or received from any browser anywhere in the world even once they've deleted it.

And don't worry about email being in two places. There are two fundamentally different modes of operation: transactional and search. When you're in transactional mode, you're reading and replying to incoming email and when you're in search mode, you're looking for something – a bit like the difference between an in-tray and a filing cabinet. In fact, trying to combine these two modes in Outlook often leads to confusion – have you ever wondered where an email went in Outlook only to realise that you had an active search?

Some of our competitors try to integrate with Outlook based upon the notion that integration is de facto desirable. Seamless integration isn't possible – because if it were, archiving wouldn't be necessary. And if integration isn't seamless, what value integration?

So, Exclaimer Mail Archiver adds significant advantages for the end user:

- A search interface dedicated to finding the email you need in seconds from any device, anywhere.
- The ability to easily search and refine by sender, recipients, subject, keywords, date ranges and more.
- 'Two click' restore to mailbox functionality when you need to action the email you find.
- The ability to maintain a single inbox for transactional email safe in the knowledge that you'll be able to find everything else, including the mails you've deleted, in seconds.

The Team Leader

Out of the box, mailboxes are designed to meet a single user's needs. Users receive emails that only they can read. This is generally a good thing for security and privacy, but oftentimes, as a leader, you want to use people's mailboxes as a team resource.
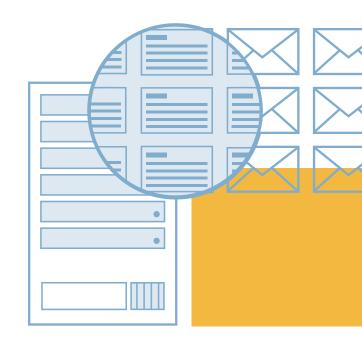
Suppose as a sales manager, you have a customer on the phone following up on an email commitment made by somebody that just went sick? Suppose, as that same sales manager, you want staff to have access to your emails to customers, but not your internal emails? Suppose as a customer service manager, you want to read an entire email trail associated with a customer complaint? Suppose as a training manager, you want to read the emails sent by a new employee to ensure their work is up to scratch?

Exchange can be configured to achieve some of these needs but as with rapid search, it's going against the grain. Exchange was designed with a per mailbox security model in mind. You either can see a mailbox, or you can't.

If you have a sophisticated CRM system, it may support some or all of the above requirements, but a CRM is major investment and oftentimes difficult to configure to achieve it all. An email archive can be a great compliment to a well configured CRM and if you don't have a business grade CRM, an email archive can be priceless to a team leader with:

- Configurable search access across different users emails and archive stores

- Powerful rules that let you send emails to different stores based upon attributes like sender, recipient, internal/external, subject and so forth.
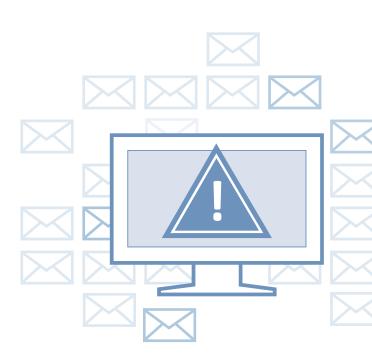
And as well as augmenting your CRM, an email archive will store any automated emails that it delivers. Your automated systems may not store outgoing emails they send, but an email archiver will.

The Senior Manager/Business Owner

Whatever your business, email will nowadays play a large part in it. A structured and rapidly searchable archive of every incoming, outgoing and internal email can be a source of huge organizational insight. It can also surface behaviours and activities that are undesirable, likely to compromise your organization or just plain illegal. Here are some usage examples:

- How many people in different departments are talking to your key customers? Is that communication joined up? Are customer relationships well managed?
- Is your key salesman about to leave? Is he grooming his best customers to take with him?
- Are any of your staff guilty of threatening or bullying behaviour by email?
- Has anyone given a customer cause for complaint, failed to meet a key commitment or matched a price promise? How will you resolve a dispute unless you have rapid access to independent evidence?
- Is anyone defrauding your business or acting in a way that will legally compromise you? It's amazing what people will commit to their work emails assuming that sheer volume makes it impossible to monitor.

Conclusion

The ability to rapidly search every email that's ever been sent or received at your organization is a hugely powerful tool. We've hopefully given you some examples of how it can be used by different types of people working in different operational environments but each organization has its own unique stories and needs.

What we confidently predict is that within three months of installing the product, you'll wonder how you ever coped without it and we also predict that at some stage in the future it will save you from a considerable organizational threat.

Finally, if you are an organization with a strong compliance need, we'll meet that need too.