Top Five Strategies for Getting an Email Archiving Project off the Ground

Overview

Today's IT department faces many challenges. A never-ending flood of email, PST folders and files are driving storage costs up. Backup windows are shrinking. And because application performance and scaling is so critical, the management of all of this information is just much more difficult.

Proactive archiving reduces business risks, lower costs and increases efficiency. In order to justify the cost of an archiving solution, organizations must consider the long-term impact of the archive on IT as well as the end-user. Here are five strategies recommended by Symantec for building the case for an archive and rationalizing your requirements of an email archiving system.

1. Recognize the benefits of archiving in relation to your backup strategy

While backup offers safeguards against unexpected data loss and application errors, archiving is the process of systematically saving copies of unstructured files (e.g. email) to reduce primary storage, manage retention and enable the discovery of information on a per item basis. Backups are an important part of your strategy. However, backups can suffer from media failure, the inability to read or restore content, or loss of the physical media. These potential problems create challenges in terms of the time and resources it takes to save and restore individual email messages and other files.
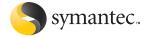
As a supplement to your backup solution, archiving is unequalled in terms of performance and availability. It indexes and represents content in a way immediately available for recall, review, and use—without operator interaction. In the case of "active archiving" solutions such as Symantec Enterprise Vault™, it also enhances data availability to the end user.

2. Promote the cost benefits of email archiving

Organizations implementing archiving solutions purchase them for a variety of reasons. Your organization may be trying to offset the explosive growth of individual mailboxes, minimize personal or shared areas on file servers, or support efficient discovery for legal or regulatory compliance. Whatever your impetus, you'll want to design your archiving solution to save money on as many aspects of storage and discovery as possible—and to highlight those savings to all potential stakeholders.

How archiving can save on storage

- Archive and eliminate existing Microsoft® PST or Lotus Domino NSF files

- Eliminate duplicate PST/NSF and mail server data, lowering their storage requirements by 50 percent

- Use less expensive storage tiers for long-term archiving

- Improve incremental backup times as data is offloaded from frontline servers and stored in a centralized location

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How archiving can save on discovery

- Eliminate IT fire drills and the time required to respond to discovery requests

- Decrease the resources needed to carry out legal holds

- Reduce the costs of manual collection, deduplication, imaging, password cracking, and tape restores

- Empower legal search and workflow to reduce document reviews

3. Get IT, legal, and records management on board to gain consensus

Archiving affects your entire organization. It's true that IT departments bear a lot of the burden when it comes to implementing email archiving policies. And IT's input is vital in choosing the right technology. However, your legal and records management groups own the process, so it's important to get all three stakeholders involved in defining an effective retention program.

Symantec recommends that you get consensus from IT, records management, and legal on core issues such as:

- What is the process for legal holds?
- What do we really need to save, and for how long?
- What is the process for e-discovery production?
- What are the records management requirements for email?

4. Don't get buried in retention policies and leave legal hold exposed

As many high-profile cases have shown, failure to comply with a discovery request for email as part of the litigation process can have a tremendous impact on a business. No wonder so many organizations have developed internal policies that call for the long-term preservation of email messages.

But don't get caught in the trap of believing that you must save everything forever or that you must define the perfect policy before you deploy an archiving system. Searching for the perfect policy can not only slow down your archiving project, but also place your organization at risk—for example, if your email is subject to a legal hold before you have policies and procedures in place to deal with such situations.

You can roll out an archiving plan by following these steps:

Implement a blanket archiving policy today

- Start archiving broadly to enforce retention, deletion, and legal holds

- Set an infinite retention policy initially and begin to finalize the process of developing the particulars of your corporate policy

Leverage folder-driven retention for user-based classification

- Push out a small number of folders per user
- Most common customer choice

Manage exceptions with custom options

- Investigate advanced automated classification and third-party options

- Contact Symantec about our custom retention policy development services

5. Make sure your archiving technology meets your long-term needs

Archiving is a long-term proposition, so choosing the right technology is key in ensuring long-term success. When evaluating archiving solutions, consider the following:

- **Is the system open?** Don't get locked into limitations of a singular archiving approach. Think beyond email. You may want to archive other content sources down the

road and this can broadly impact storage options as well as other applications or business processes. The more choices an archiving system provides around an "open" technology that facilitates manageability, flexibility, and integration with other solutions can reduce your total cost of ownership.

- **How scalable is the system?** Keep in mind, the number of policies and the volume of data archived will generally impact the number of archive servers required and retention periods will impact storage. Use sizing guides and storage calculators to help plan better, but also consider additional elements when considering a solution's ability to scale.

  - Can the archive be deployed centrally or distributed?
  - Can items be classified and retained selectively?
  - How easy is it to roll-out and enable end-users?
  - How easy is it for end-users to access themselves?

- **What is the vendor's long-term strategy?** Archiving is a mission-critical task, so your confidence in the system's supplier is vital. The vendor you choose should have proven customer success and proven commitment in supporting its products.

More information

About Symantec Enterprise Vault™

Symantec Enterprise Vault provides a software-based Intelligent Archiving platform to store, manage, and discover corporate data from email systems, file server environments, instant message platforms, and content management and collaborations systems. Because not all data is created equal, Enterprise Vault utilizes intelligent

classification and retention technologies to capture, categorize, index, and store target data to enforce policies and protect corporate assets, while reducing storage costs and simplifying management. It also provides specialized applications such as Discovery Accelerator and Compliance Accelerator to mine archived data in support of legal discovery, content compliance, knowledge management, and information security initiatives.

Visit our Web site

www.symantec.com/enterprisevault

About Symantec

Symantec is a global leader in infrastructure software, enabling businesses and consumers to have confidence in a connected world. The company helps customers protect their infrastructure, information, and interactions by delivering software and services that address risks to security, availability, compliance, and performance. Headquartered in Cupertino, Calif., Symantec has operations in 40 countries. More information is available at www.symantec.com.

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