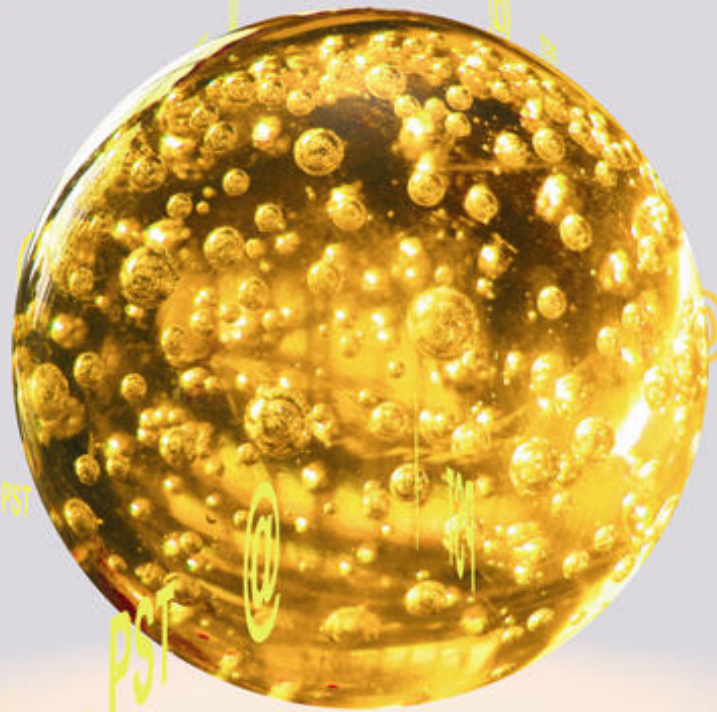


## **PAM for EXCHANGE** email archiving at its best

### **Whitepaper**

EMAIL ARCHIVING SOLUTION GUIDELINES



#### **CONTENT**

This document outlines the benchmarks for email archiving functionality. It is an aid for potential customers to gain further insight and better perspective into email archiving.

Author: Adam Surch

All Rights Reserved, including all rights concerning reproduction, copying or any other use or transmission of this document and its contents or parts of it. No part of this publication may, no matter in what form, be reproduced without written permission by H&S Software AG, passed on to third parties, edited by electronic retrieval systems, copied, distributed or used for public presentations. H&S Software AG reserves the right to change and update the content at any time. All data shown on screenshots is solely for demonstration purposes of the software. H&S is not responsible for this content.

PAM-STORAGE® is a trade mark of H&S AG. Microsoft®, Microsoft Windows® and the names of other Microsoft Products are registered trademarks of Microsoft Corporation. All Rights Reserved. Other product names are being used for identification purposes of products and can be registered trademarks of the according manufacturers. Doc.No. exp-wp-0709-001

H&S Heilig und Schubert Software AG  
A-1150 Vienna, Staettermayergasse 30

Tel. ++43.1.21555  
Fax. ++43.1.21555-200  
email: [issteam@hs-soft.com](mailto:issteam@hs-soft.com) | [support@hs-soft.com](mailto:support@hs-soft.com)

URL: [www.hs-soft.com](http://www.hs-soft.com)  
URL: [www.hs-soft.com/email-archiving](http://www.hs-soft.com/email-archiving)



## Email Archiving Solution Guidelines

This document outlines the benchmarks for email archiving functionality. It is an aid for potential customers to gain further insight and better perspective into email archiving.

It consists of professional standards in measuring the performance, feature set, usability, technology, implementation and support of a solution. Current industry archiving best practices have been analysed and arranged in an unbiased way that reflect common archiving goals. H&S developers and archiving specialists are responsible for compiling this study which is designed to demonstrate an honest reflection of email archiving principles.

### Performance and Features

How the email archiving operates in its environment and the quality of its feature set is a deciding factor. Many solutions perform well but lack the feature set to fulfil the system requirements while others have poor performance levels. The differences from system to system effect performance rates but the underlying factors remain constant when implementing an archiving solution. Search and retrieval capabilities alongside archiving and restoration aptitude form the basis for archiving requirements as system architectures constantly mature and evolve in the forefront.

#### Archiving Jobs

##### Fundamental Archiving Jobs

Scheduling	
Singular and multiple mailbox users at predetermined times	
Archive by Preference	
Archive by doc type/class, size or age	
Threshold	
Set upper percentage limit for when the archive limit is reached, archiving begins to the lower percentage level.	
Quota	
Set an upper limit for when archiving can begin (starting with the biggest messages)	

Archiving Features

Does the archiving solution consist of the following principal archiving features?

	Yes	No
Single Instance Storage		
PST Importer /Gatherer /Archiver		
Public Folder		
Automatic Versioning		
Outlook User Add-in		
OST Offline Synchronisation		
Full-Text Search		
Web Archive Portal		
OWA Support		
Alerter Service		

Technical Support

Does your Archiving Solution Support the following products/technologies?

Product / Technology	Yes	No
MS-Exchange 5.5 / 2000 / 2003 / 2007		
MS-Outlook 2000 / XP / 2003 / 2007		
MS-SQL Server 2000 / 2005 / Express		
Oracle 8.x / 9.x / 10.x		
Cluster		
Storage Software: PointSoftware, Pegasus, Amass, Saperion		
All Storage Media inc: HDD, RAID, Jukebox, Tivoli, EMC Centera, DVD, CD-ROM, NetApp, HP NAS, Plasmon		
Blackberry users		
MAC's		

Retention Categories

Policy Management	
Set retention times for individual messages, user mailboxes and user groups	
IT Administrator has full control over retention period	
Long term archiving	
Document transition between different file types before long term archiving	
Audit compliant	
Keep Alive time	

Archive, Search and Retrieve

- How is the overall archiving process suited to your email management necessities?
- How is the email message archived? By splitting body and attachment? As a whole object?
- Can different message types and classes be archived?
- Is the solution able to archive further exchange objects such as, calendar, tasks, etc.?
- What are the archiving speeds of these messages? Does the speed change with different storage media?
- Is full text search included in the software package? Or is it sold as an added module?
- Is the solution capable of enterprise wide search? How accurate is the search?
- Can searches be saved for Audit purposes?
- Which language characters does the search engine recognise?
- Do different system configurations have an effect on retrieving messages?
- Can multiple users retrieve multiple emails simultaneously? Does this affect the system performance?
- How are the shortcuts left behind in the Exchange Store managed? Is there a way to delete unused stubs after a certain amount of time?

### Response Times

- How long does it take to archive and retrieve messages for one and multiple users?
- Are the users content with the email retrieval time?
- Are the response times effected by the MS Exchange environment?  
Will growth in email traffic and servers effect the archiving environment?
- How long does full text search take to display results?
- Is the response time effected by the search criteria?
- What is the message transfer rate between storage media when long term archiving?

### Managing Security

- Do users have the choice to archive or not?
- How is the user authorisation controlled?
- Can users theoretically tamper with other users mailboxes?
- Do users diverge from Outlook to view and edit archived emails?
- What security measures are in place connecting the MS Exchange environment?
- What are the legal aspects concerning your email management and requirements?
- Are audits common practices in your company and does your solution support tamper proof, WORM storage media?
- Is signature software compatible with the solution?

### **Usability**

The Users and Administrators must feel comfortable in the interface environment of the solution. Style and format are important interface qualities alongside the functionality and ease of use of the display. Administrators use many different interfaces on a daily basis therefore it is important to keep the Admin control panel easily usable and manoeuvrable.

#### For the User

- How is the user affected by an email archiving solution implementation?
- Must users diverge from MS Outlook at any point to view archived messages?
- Does the user interface (Outlook) change?
- Are emails simple to view and retrieve (Double click)?
- Does the solution allow the user to archive, restore and search from within the MS Outlook interface? Is there an optional client Add-in?
- Are individual workstation installations necessary?
- Is there any need for user training?
- Can users manually archive, search, restore, delete and view versions of archived emails?
- Is there an optional Outlook Add-in? Is it possible to choose which Add-in functions the user is authorised to have (i.e. Archive and Search only)?
- Can users access the archive outside the office? How reliable is this service?

#### For the System Administrator

- Is the Administrator control panel robust and user friendly? Can the entire archive be viewed from this portal?
- Is it possible to assign multiple archiving jobs to multiple mailboxes?
- Is it possible to schedule your archiving jobs for off peak times?
- How easy is the archive to maintain? Is there an alerter service, automatic detailed reporting?
- What impact do the archive features have on the policy management? Does configuration of jobs have an affect on any part of the solution?
- How much of the archiving process is automated? How much control will the Administrator have?

**Technology**

IT providers should be at the cutting edge of advancements in their particular field. The solution vendors or developers should be constantly working on the new features the product could have in the future. Email archiving is a growing technology that is evolving constantly therefore your solution provider should be in the forefront of this movement.

Does your solution include these email archiving advanced technologies?

Integrated Hierarchical Storage Management	
Parallel Archiving	
Post Processing for third party integration	
Direct Archiving®	

- Does your solution have an integrated archive engine that allows for advanced email storing?
- Is your solution a unified integrated package? Or made up of different software components?
- What disaster recovery features does your solution have? Archive web portal to access the archive remotely? Multiple Saving?
- Are they tested in your individual scenario?
- How often is the product updated? How easy are the new versions to install? And are the new improvements worthwhile and effective?

**Implementation and Maintenance**

The ease of installation and configuration is a priority in choosing an archiving solution. Ensure the vendor is committed to the successful outcome of your individual project and the smooth integration into your existing elements of your MS-Exchange environment. We suggest before implementing the software onto your live company system, to setup a test server and run a trial of the solution.

- How is the solution installed and by whom? The IT Administrator? Remotely? On-site technician? Can you choose?
- Does the implementation cost more than the software?
- Are you able to test the product out on a trial period before purchasing?
- Are there any hardware drawbacks? Any products the solution does not support?
- Is the solution easily scalable if your environment grows?
- Are you or have you migrated MS-Exchange servers?

### Ownership

- Estimate the growth of your storage systems, the time period and what support and maintenance you will require from the archiving vendor.
- Calculate the cost of storage media currently and in the future? Which storage types? Ensure the solution is compatible with your current hardware?
- Are there any storage location factors to be resolved? What kind of storage network do you currently have and what infrastructure would suit your MS Exchange environment the best?
- What impact will the solution have on your current network bandwidth?
- What impact will the solution have on the remaining IT architecture?
- What would happen if the number of mailboxes/users grew?
- What is your archiving strategy? Short term, long term storage? Audit purposes? Storage management?
- What are the current backup operations in your system? Is email archiving beneficial or unhelpful to these processes?
- Will you still need to perform backup jobs or can the software perform parallel archiving?
- Ensure the archive database is updated and able to configure with changes in the archiving solution.
- What is the software licence cost?
- Are there any hidden costs? Does the software licence base rate include the major software features? Do you pay extra for basic features?

### **Support**

Implementing and maintaining the archiving solution requires assistance from the vendors even in the form of an installation manual. Dedicated staff with modest business values and an in-depth knowledge of the product is the desired support service. Company morals and motivation also contribute to the support methods and customer relationship.

#### Customer Service

- What kind of support does the vendor offer? Email? Telephone?
- How long does it take for your queries to be answered?
- Does the support you receive resolve the problem?

#### Company History and Direction

- Is the company focused on archiving? Do they develop other products?
- What experience does the company have in this area of IT?
- Do the vendors have a reputable history? Are they customer focused or business orientated?

#### Customer Reference

- Can the company reference successful worldwide customers which have had successful support and implementations?

## **About PAM for EXCHANGE**

### Where **PAM for EXCHANGE** Excels

- H&S are sole developers of the whole archiving software therefore no third party components need to be implemented.
- The H&S Development Team are dedicated document management and archiving specialists.
- Our advancements in archiving technology drive our business objectives.
- Our solutions are proven to improve the efficiency and security of your email management.

### Why **PAM for EXCHANGE** ?

- Severely reduce the strain on the MS-Exchange Server
- Drastically reduce costs and improve reliability by archiving onto inexpensive storage media
- Take advantage of a unified approach to email archiving
- Protect against email loss and manipulation through audit secure compliant archiving
- Customise **PAM for EXCHANGE**'s interaction with your existing Information Systems
- Eradicate PST's

### **Performance and Features**

**PAM for EXCHANGE**'s performance is unaffected regardless of mailbox numbers and the solution is scalable to compensate any growth in the MS Exchange environment. The major advantage of **PAM for EXCHANGE** is the affect it has on the MS Exchange environment by reducing the overworked server thus improving system performance. With a comprehensive feature list, **PAM for EXCHANGE** achieves higher levels with email lifecycle systems providing a robust sustained infrastructure.

### **Usability**

H&S work closely with Microsoft by developing our products to complement the styles and usability of the Microsoft products. When email archiving with **PAM for EXCHANGE**; the front end Outlook interface remains the same and the user is unaware of any changes made. For the Administrator, the control switchboard is named, enterprise manager and is fashioned for quick job settings and simple manoeuvrability. Based upon the Windows XP interface, the enterprise manager is a familiar backdrop for IT Administrators to coordinate.

### **Technology**

**PAM for EXCHANGE** is continually evolving with updates and new versions released regularly. The H&S development team have years of document management and archiving experience in composing software systems. Sound knowledge and consistent curiosity in email archiving advancements pushes **PAM for EXCHANGE** to the highest level.

### **Implementation & Maintenance**

H&S have installed **PAM for EXCHANGE** numerous times worldwide either remotely or on-site. If the IT Administrator wishes to install the solution themselves then we gladly assist by all means necessary. Software maintenance is minimal and fully supported by our H&S support team.

### **Support**

Assistance is pivotal in successful archiving projects, and at H&S it is a principal philosophy. The support team work off peak hours providing full email assistance to all evaluating customers and also telephone support to paying customers.