



**JATHEON**  
DATA | KNOWLEDGE | INSIGHT

# EMAIL ARCHIVING: Best Practices For Today's Leading Enterprises

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E-book



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# INTRODUCTION

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EMAIL ARCHIVING IS AN ESSENTIAL COMPONENT OF EVERY IT ENVIRONMENT. WHEREAS IT USED TO BE CONSIDERED SIMPLY AN ADDITIONAL BENEFIT, ARCHIVING OF EMAIL AND OTHER UNSTRUCTURED DATA HAS BECOME A MUST THESE DAYS, AND FOR VARIOUS REASONS, INCLUDING REGULATORY COMPLIANCE AND DATA STORAGE CONCERNS.

The implementation of email archiving can appear daunting to any organization, but especially to big companies with large IT systems and hundreds or thousands of email users. But fear not! Implementing email archiving in big companies is easily manageable as long as you develop a sound strategy.

In order to help you make the most of email archiving, we have compiled a list of email archiving best practices for large IT systems. Keep reading even if your organization is small - most of the practices apply to you too!



## #1 IDENTIFY YOUR CHALLENGES BEFORE BUYING TECHNOLOGY

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The biggest mistake IT managers make while researching email archiving options lies in not fully understanding all the challenges that could be remedied by archiving. Companies often put out fires as they come up instead of having a more structured approach which would help to prevent them altogether.

Let's say you have an upcoming audit, and you're not ready. You enter troubleshooting mode, which leads you into a rash technology purchase, leaving you with an archiving solution which might be compliant with a certain regulation you had in mind, but doesn't help your storage problems at all.

*Most companies have more than one problem that can be solved with email archiving.*

Most companies have more than one problem that can be solved with email archiving. Whether it be storage management, regulatory compliance, or data protection, make sure you understand all of your needs before making your purchase.

## #2 CREATE OR UPDATE YOUR EMAIL RETENTION POLICY

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Very few companies have a regularly updated email retention policy. If you're one of them, hats off to you, but you can always make a few tweaks to improve it. If, on the other hand, you're part of the majority, make a policy! It is the only way to get all your coworkers on board and make it official.



An effective retention policy should address what the policy covers, as well as your company's data retention guidelines, procedures and responsibilities. It should also include retention timeframes for all the different types of data you want to retain and retention schedules that everyone will be able to follow and remember easily.



Make your retention policy short and simple – this is really important. If an employee needs more than one minute to decipher a policy, they will not follow it. Also, very importantly, the less complicated the policy, the more uniform your archives will be.

Finally, review your data retention policy annually. Laws and regulations change regularly, and your policy needs to reflect that.

## #3 INCLUDE ALL RELEVANT INPUT IN THE CREATION OF YOUR POLICY

An email retention policy affects everyone in the company and should reflect input from all employees. Create a cross-functional team that represents most of your business operations or departments when creating the policy. Interview a wide sample of your coworkers from different departments to determine how and why they create documents, whether they re-use or reference them later and where they store them. This will help you create a policy which will address the real situation in your company and which won't negatively affect your co-workers and their day-to-day tasks.

## #4 PREACH YOUR POLICY AMONG ALL EMPLOYEES

Make sure you inform all your coworkers of the new or existing policy clearly and adequately and make sure it is easily accessible by everyone.

All employees should be properly trained in email retention policy. They should know why it was created and be aware of all the legal and regulatory requirements and possible consequences of non-compliance. They should also be able to use any unfamiliar technology associated with the policy.

*If you train everyone properly, no one will be able to say "But I didn't know about it!"*

If you train everyone properly, no one will be able to say "But I didn't know about it!" Prevent excuses and do your share of the work by appropriately informing your entire team. This doesn't have to be an ordeal, even in a large system. As long as you create a training procedure and stick to it, you will be able to cover everyone.



## #5 EMPOWER YOUR COWORKERS

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Yes, empower them! Implementing an email archiving solution and allowing employees to access their own content will not only lighten the load on the IT department, but also increase the confidence of the employees in that they are able to access their information without needing to bother others.



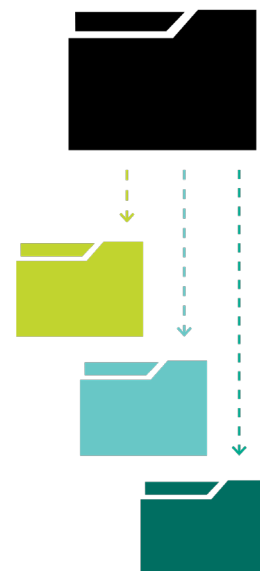
It can be difficult for the IT department in a large company to find the time necessary to retrieve everyone's lost or deleted files due to time or personnel constraints. An archive enables all employees to fend for themselves.

When you archive your company emails, you are able to improve the productivity of both non-IT employees and your IT staff.

## #6 DISCOURAGE PSTs COMPANY- WIDE

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In companies that don't use automated email archiving, most employees create their personal storage folders or PSTs. The reasons for this vary, but most commonly include reference, re-use, future protection or other motives. This is time-consuming and, as a result, has a negative effect on employee productivity.



When you implement an email archiving solution, employees won't need to waste valuable time creating and searching personal archives, so make sure you also inform everyone PSTs are no longer needed and direct them to your archiving solution's search function. All hail 2017!



## #7 DON'T DELETE EMAIL BUT DON'T ARCHIVE JUNK EITHER

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You may think that you'll never need to view a particular email again, but some months later, you might actually realize that you desperately need it. If you have deleted it, it's gone for good. When you archive your emails, there is no need to delete. If you really don't need to view an email again, then you won't have to, but the option will still be there.

Spread this tip among your coworkers. We all know how annoying it is to search for an email and come to the realization that you deleted it a year ago. So don't! One less thing to worry about, with all your company's email safely archived.

*When you archive your emails, there is no need to delete.*

On the other hand, just as you don't want your data to slip into the void, you don't want a mountain of unnecessary information either. Make sure your spam, junk, and unwanted mail is blocked before it goes through your email server and archiving system.

## #8 AUTOMATE YOUR ARCHIVING REQUIREMENTS

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Your IT team has to withstand intense pressure while addressing requirements from various departments in your company. There are various compliance requirements which already put a strain on your IT operation. The Legal department is demanding eDiscovery of electronic communication data and the ability to export and manage it. On top of that, employees are requesting IT staff to find lost or deleted emails, and HR wants to prevent potential employee misconduct online. No wonder your IT staff are gasping for air.

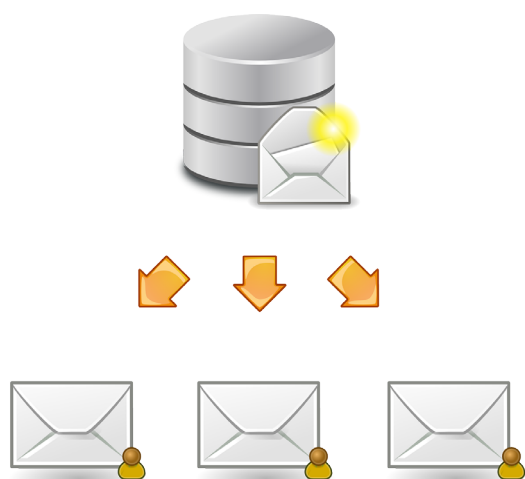
Automate your archiving requirements. Don't let this be done manually – it is time-consuming and a total productivity buzzkill. Automation will get you up to speed with regulatory requirements and eDiscovery in no time and allow you to neutralize the risk of human error while freeing up valuable IT time for other important tasks.



## #9 LIGHTEN THE LOAD ON YOUR SERVERS

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A key benefit of email archiving is the load it lifts off your company servers and your IT staff. If you have a large IT system, there are huge amounts of information on your servers. This significantly increases the chances of your servers crashing and weakens their overall performance. It can be nearly impossible to quickly and easily access, search and retrieve data produced by hundreds or thousands of email users.



Imagine the worst-case scenario – your data is lost. It would take forever to restore large amounts of email data, not to mention how much it would eat away at your hardware and affect your personnel.

When you archive your emails, storage requirements can be significantly decreased and mailbox sizes reduced. This will decrease the time it takes employees to retrieve emails and give them direct access to a database of emails. Overall, email archiving will lessen the physical load on your server, ensuring prime performance speed while lowering the likelihood of crashes.

## #10 USE BOTH ARCHIVING AND BACKUPS

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Backing up is not enough. While a backup is mostly meant to restore files after disk failure or server issues, archiving stores documents with their metadata, and usually involves a much more complex indexing system, allowing for advanced search.

However, both email archiving and backups are essential for data security. Do not exclude your archives from backup and disaster recovery plans. If your network fails and you need to restore your database, you still require a complete backup of that database. However, with the added advantage of email archiving, if your database backup is also corrupt, you will be able to restore that via the archive. It is, without doubt, a win-win





situation as you have two separate locations from which you can restore your database in its entirety.

*Do not exclude your archives from backup and disaster recovery plans.*

This is an issue that gets overlooked more often than you might think. A combination of on-premises email archiving and off-premises backup storage is a solid plan that will make Disaster Recovery (DR) a lot more manageable.

## #11 FIND A SOLUTION THAT MEETS YOUR REGULATORY REQUIREMENTS

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Although most businesses and organizations today are aware of their responsibilities in terms of archiving of email and other types of internal communication under compliance legislation, they are rarely sure how to implement it. Companies of all sizes from industries all over the spectrum face the need to comply with extensive rules and

regulations regarding the retention of emails, instant messages and social media information. Those who fail to comply are increasingly at risk of audits, government investigations and lawsuits, and can face fines or even, in severe cases, imprisonment, as dictated by regulatory bodies.

Once you have identified the regulatory requirements which apply to you, find an email archiving solution that meets them all. A comprehensive archiving solution will help you stay on top of your game when it comes to compliance and save you many headaches and hours wondering whether you've done everything you should.

## #12 FIND A SOLUTION THAT HANDLES BOTH DATA ARCHIVING AND PROTECTION

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Companies often have a number of different solutions for data archiving and protection, most of which don't work well together. Without a comprehensive solution, what you get is an enormous amount of single channels containing company data, which is primarily stored on expensive hardware and



potentially conflicting and competing software.

Find an archiving solution that will meet both your archiving and data protection needs and that will store all your information in a single, easily searchable repository. Having a single technology which suits all your requirements will relieve you of some of that daily stress.

## #13 USE YOUR ARCHIVING TO THE LAST DROP

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Besides the obvious benefits it provides, such as regulatory compliance and storage management, email archiving can also offer further advantages. You should treat your archive as a corporate intelligence repository, as well as a safeguard against potential threats.

As much as 75 per cent of a company's intellectual property is housed within its messaging system. An archive gives your company access to a rich repository of corporate knowledge through an easy-to-use search interface. You can perform keyword searches and analyze your archive, potentially reaching important insights. Plus, the majority of us refer to old emails when

composing a new message, and an archive provides invaluable assistance.

*You should treat your archive as a corporate intelligence repository, as well as a safeguard against potential threats.*

Also, email archiving tracks potential threats to your company safety, from viruses and malware to employee misconduct and data leaks. You can also use your archive as a safeguard – to detect and prevent potential damage to your company's assets and reputation.



## CONCLUSION

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Email archiving in a large IT system is not easy, but developing a strategy based on industry best practices and implementing it patiently and consistently will get you on the right track. You will not only achieve complete regulatory compliance, data protection and storage optimization, but also notice an improvement in employee productivity.

Once you have identified your needs, implemented an appropriate archiving solution and trained everyone involved, you can take a breather – your data is safe and sound.

If you would like to find out how Jatheon can help you implement and manage an archiving solution in your IT system, [contact us](#) or **request a demo**.

## ABOUT JATHEON

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Founded in 2004, Jatheon Technologies Inc. designed the world's first non-intrusive network appliance.

Today, Jatheon continues to raise the bar throughout the industry with its latest enterprise grade **cCore** appliance line, and **ergo**, its powerful email archiving, indexing, retrieval and dynamic monitoring software solution, and best-in-class technical support, **The Jatheon Guarantee**.

Jatheon is headquartered in Toronto, Canada and serves clients worldwide through its network of global business partners. For more information, please visit [www.jatheon.com](http://www.jatheon.com).