



JATHEON
DATA | KNOWLEDGE | INSIGHT

HOW TO CAPITALIZE ON EMAIL ARCHIVING: Best Practices of Email Archiving in a Large IT System

E-book



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INTRODUCTION

EMAIL ARCHIVING IS AN ESSENTIAL COMPONENT OF EVERY IT ENVIRONMENT. WHILE IT USED TO BE JUST NICE TO HAVE, THESE DAYS THE ARCHIVING OF EMAILS AND OTHER UNSTRUCTURED DATA IS BECOMING A MUST FOR VARIOUS REASONS, INCLUDING REGULATORY COMPLIANCE AND DATA STORAGE CONCERNS.

While it used to be just nice to have, these days the archiving of emails and other unstructured data is becoming a must.

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

We have compiled a list of email archiving best practices for large IT systems (and even if your organization is small, most of these apply to you too), hoping to help you make the most of email archiving.



#1 IDENTIFY YOUR CHALLENGES BEFORE BUYING TECHNOLOGY

The biggest mistake made by IT managers when researching email archiving options is to not fully understand all their challenges that could be remedied by archiving. Companies often put out fires at random instead of preventing them altogether.

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

#2 CREATE OR UPDATE YOUR EMAIL RETENTION POLICY

Very few companies have a regularly updated email retention policy. If you're one of them, hats off to you, but you can always tweak and 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 and your company's data retention guidelines, procedures and responsibilities. It should also include retention timeframes for all the different types of data that you want to retain, as well as 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, he 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, if they re-use or reference them later and where they store them. This will help you create a policy that will address the real situation in your company and that won't negatively affect your co-workers and their day-to-day tasks.

This way, you do your job and win the popularity contest at the same time.

#4 PREACH YOUR POLICY AMONG ALL EMPLOYEES

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

All employees should be properly trained on the 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 taught 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 hard, 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

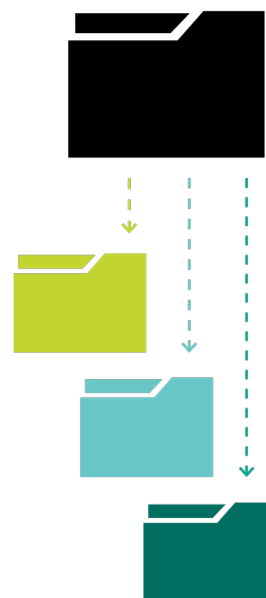
Yes, empower them! Implementing an email archiving solution within the business and allowing employees to access their own content will not only lighten the load on the IT department, but it will also increase the confidence of the employees that they are able to access their information without needing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



While it's difficult for the IT department to find the time necessary to retrieve everyone's lost or deleted files within a large company 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

In companies that don't use automated email archiving, most employees create their personal storage folders or PSTs. The reasons for this vary, but people create PSTs for reference, re-use, future protection or other motives. This is time consuming and so negatively affects 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

You may think that you'll never need to view a particular email again, but if 6 months later you decide that you now desperately need that email, if you have deleted it, it's gone. When you archive your emails, there is no need to delete. If you really don't ever 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 that it is very annoying to go searching for an email and then come to the realization that you deleted it a year ago. So don't! One thing less 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 do not want your data slipping 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

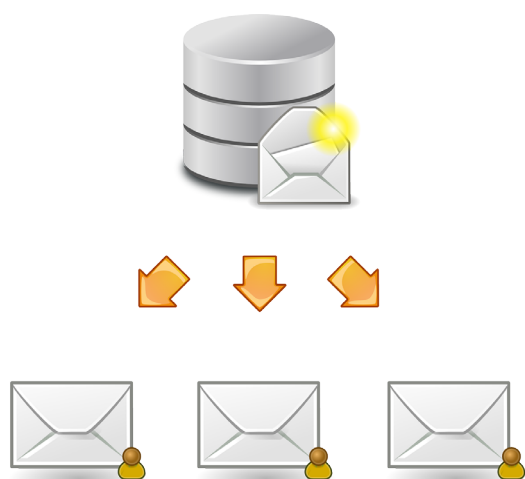
Your IT team is under more pressure than ever to address requirements from various departments in your company. Besides the various compliance requirements which already put a strain on your IT operation, the Legal department is demanding eDiscovery of electronic communication data and the ability to export and manage it, employees are requesting IT staff to find lost or deleted emails, and HR wants to prevent potential employee misconduct online, while your IT staff is 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 will avoid the risk of human error, all the while freeing up valuable IT time for other important tasks.



#9 LIGHTEN THE LOAD ON YOUR SERVERS

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, you have huge amounts of information on your servers which significantly increases the chances of your servers crashing, and will absolutely slow down 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 it would eat away at your hardware and 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 decrease the physical load on your server, ensuring prime performance speed while lessening the likelihood of crashes.

#10 USE BOTH ARCHIVING AND BACKUPS

Backing up is not enough. While a backup is mostly meant to restore files after disk failure or server issues, archiving stores documents as well as 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 must 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 can restore that via the archive.



It's basically a win-win situation because you have two separate locations from which you can entirely restore your database.

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

Most businesses and organizations today are aware of certain responsibilities they have when it comes to the archiving of email and other types of internal communications under compliance legislation, but aren't 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 when it comes to the retention of emails, instant messages and social media information. Those who fail to comply are increasingly at risk for 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 will 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

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



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. Channeling all your requirements into one single technology will relieve you of some of that growing stress.

#13 USE YOUR ARCHIVING TO THE LAST DROP

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

Namely, as much as 75 per cent of a company's intellectual property is housed within its messaging system. An archive offers your company access to a rich repository of corporate knowledge through an easy-to-use search interface. You can perform searches by any keyword you like and analyze your archive, potentially reaching important insights. Plus, the majority of us don't want to reinvent the wheel every time we're working

on a new message – most of us refer to old emails when composing a new one.

You can and 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, detecting and preventing potential damage to your company's assets and reputation.



CONCLUSION

Email archiving in a large IT system is not easy, but if you develop a strategy based on industry best practices and implement it patiently and consistently, you are on the road to stardom – you can achieve complete regulatory compliance, data protection, storage optimization and employee productivity improvement.

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

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.