

EXCHANGE 2007 TIPS

Tip #3: Managed Folders vs Third-party Archiving

Courtesy of Sara Appleyard, Essential Computing—Email Management Experts Since 1992

Introduction

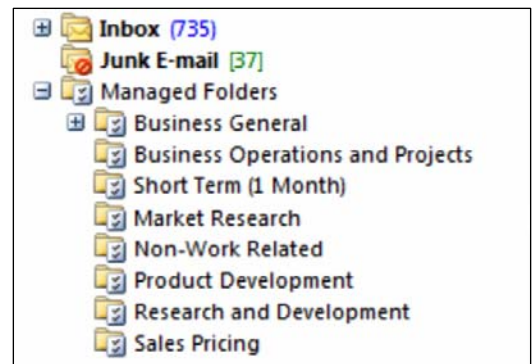
In. Out. Pending. Before the office went digital, these were the only 'folders' you had to worry about—you did your work on real paper and then let a dedicated records team worry about filing, shredding, or transferring it onto microfiche. Happy days!

Now we are all expected to be our own filing clerk. And although filing is a simple drag-and-drop, the average individual is not a trained records manager. Many employees feel that records management is not relevant to their daily work. Some even believe that keeping stuff in their inbox (rather than putting it neatly away in folders) will actually act as a memory aide.

Will Exchange 2007 Managed Folders Help?

Probably.

The new Managed Folders feature in Exchange 2007 lets organizations create custom folders that match their information retention and deletion needs (such as 'Special Projects', 'R & D', and 'Sales Quotations').



Folders can then be combined with policies that determine how the contents of these folders will be managed over time. (For example: Delete after six months; or move to a journal mailbox or a SharePoint records repository after one year.)

It is also possible to set quotas on folders and trigger a cleanup warning at a given threshold.

Custom folders can be rolled out organization-wide, departmentally, or to specific individuals. As with default folders, they cannot be renamed, moved, or deleted by end users.

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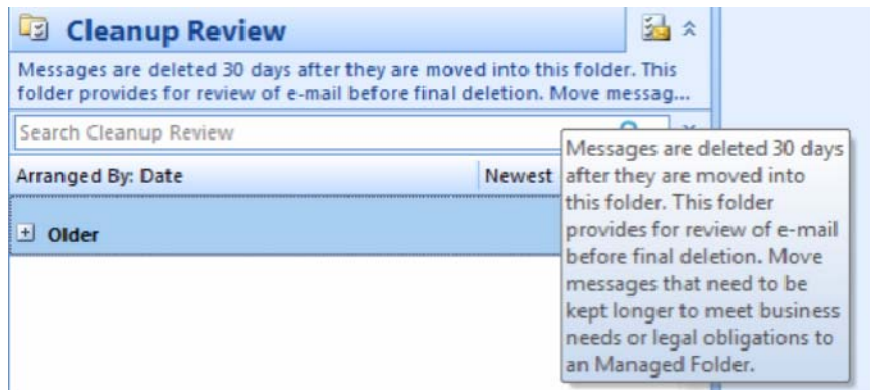


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To give end users extra guidance with their filing decisions, text labels that describe the folder's 'records management settings' can be displayed in Outlook.

The final piece of the jigsaw is the Managed Folder Assistant, an automated service which can be scheduled to scan folders and determine which items are eligible for being deleted or moved, or which folders have reached quota, if this option is set.



Will Managed Folders Replace the Need for 3rd Party Archiving & Compliance Software?

Probably not. Four elements are essential to any email archiving solution:

1. It must reduce email storage costs
2. It must have no impact on Exchange
3. It must have advanced E-discovery capability
4. It must support changing legislation (as we don't know what is 'coming down the track')

Let's look at how Exchange 2007 Managed Folders measure up to these four business requirements:

1. Do Managed Folders Reduce Storage Costs?

Yes, to a degree; but you will need to apply stringent deletion policies and quotas on both custom managed folders and default folders in order to make a significant reduction in Exchange store sizes.

If you move items to a journal mailbox or other repository, you're arguably just shifting the storage problem elsewhere.

Either way, you run the risk of upsetting users and increasing the number of requests on the IT team to find and restore deleted/moved emails and to increase quotas.

By comparison, most archive solutions let you substitute emails on Exchange with much smaller shortcuts that link transparently to the archived original – thus reducing Exchange mail store sizes without sacrificing user accessibility. Archiving solutions also offer substantial storage savings through single instance storage and compression.

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2. Do Managed Folders Impact Exchange?

According to Microsoft, the service that scans folder contents (the Managed Folder Assistant) can be a 'resource-intensive process' that requires regular monitoring of disk performance, CPU usage, and other metrics to avoid negative impact on Exchange and on your network.

See <http://technet.microsoft.com/en-us/library/bb123548.aspx>

Dedicated archiving solutions tend to offer high performance scanning and the ability to auto-calibrate activity according to performance metrics. If you choose an archive solution that supports Managed Folder settings, you can use this instead of the resource-hungry Managed Folder Assistant.

3. Do Managed Folders Offer Advanced E-discovery Capability?

Managing data retention is just part of the story—you must also be prepared to respond to e-discovery requests. To that end, you need a dedicated tool that does much more than simple text searching.

Although MOSS 2007 offers significant search improvements, don't expect to be able to search content for actual meaning or concepts.

The fact is that discovery is a specialized area, requiring the ability to manage workflow across a team of reviewers, put 'legal holds' on items to prevent them being policy-deleted during the course of an investigation, tag and add comments, export search results into legal-ready format, and more.

So unless you are really handy with SharePoint Server development, you may be better off with a 3rd party e-discovery solution. Also, 'user friendliness' is vital—especially as the IT department should do whatever it can to extricate itself from what can be a very time-consuming and sensitive process.

4. Do Managed Folders Support Evolving Compliance Needs?

Although policies can be changed on an ongoing basis, emails that have already been 'actioned' can be trickier to handle. If they've been moved into SharePoint, you would need to manage them from there. If they've been copied into journal mailboxes or other repositories, you may have limited capabilities.

By comparison, archiving solutions tend to offer better end-to-end lifecycle management of information—over what could be decades. For example, you might have to extricate items belonging to a given set of users following a de-merger, or move data between different types of storage technology to protect from storage obsolescence.

Changes in legislation or new guidelines may also require you to amend or apply new retention policies to data post archival based on actual email content or other criteria.

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Conclusions

You can't expect your users to change a lifetime of bad filing habits overnight, nor can you turn everyone into ardent records managers; but Exchange 2007's new Managed Folders feature is a good start.

Combined with end user training and some well chosen folder names, like "Put all your proposals here or die" (OK, that's a bit extreme), you can push your users towards better, more uniform information management.

You might also decide to 'get tough' and set retention rules on default folders so that anything left 'lying around' in the inbox gets policy-deleted (say, after 6 months). But it would be kinder to your end users, less demanding on your Exchange servers—and easier on your IT team—to use archive software to turn items into shortcuts rather than delete them or move them.

Managed Folders, used in conjunction with the right archiving and e-discovery solution, will encourage better housekeeping AND protect your vital information—without having a negative impact on business efficiency or IT overhead.

Finally, if you plan to rely solely on end users putting items in the correct folders to meet company retention policies, then I admire your optimism.

Consider this too: Certain items which may be the subject of a future investigation will never get foldered—they will most likely get deleted. Even if you had the foresight to set up Managed Folders for 'Offensive Jokes' and 'Insider Trading', you'll be sadly disappointed with the results.

Ultimately, the only fail-safe way to avoid this situation is to capture all items from journal logs, in which case an archiving solution will help you manage the additional storage overhead.

You might also look towards emerging technology for automated classification and intelligent analysis and profiling of unstructured content, thus removing your reliance on end users altogether and bringing the responsibility for information management back to the business—where it belongs.