



EMAIL ARCHIVING

Besso Limited

Phoenix implemented Symantec Enterprise Vault to enable Besso to tackle email archiving and retrieval

Besso Limited is a fully independent Lloyd's of London broking house, offering a wide range of specialist insurance services to a worldwide customer base. Situated in the City of London and employing over 200 people, Besso faced the twin challenges of capturing and retaining email data for regulatory compliance while ensuring the email system remained manageable and reliable. Phoenix implemented Symantec Enterprise Vault to enable Besso to tackle these issues head on.

Besso's IT systems are based on a core set of Microsoft server technologies that support specialist insurance applications, as well as the usual range of everyday business applications. Windows Server 2003 and Active Directory provide the majority of network services, with an active/passive Exchange 2000 cluster delivering email and calendaring capabilities. Like many other organisations, email has become increasingly important to Besso's day-to-day operations. Exchange Server is now seen as a mission-critical application - as brokers need to maintain constant contact with customers around the world, email often provides the best method for doing this.

THE CHALLENGE

Getting the Best Out of Exchange

The increasing reliance of the business on email services had begun to present Besso's IT team with a number of significant challenges. The following problems will be familiar to the majority of organisations running an enterprise-wide email system, although the business drivers can vary from sector to sector:



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- **How to ensure regulatory compliance?**
To achieve compliance with FSA (Financial Services Authority) guidelines on records management, Besso need to capture and retain all electronic records, including emails, which may be required in the future. Records relating to different types of business activity have different retention rules and periods
- **How to improve Exchange recovery times?**
The increasing size of the Exchange mailbox store had begun to cause problems, as backups were taking longer and longer to complete. This in itself was not a major problem, however, Besso's technical team were rightly concerned that it would be impossible to meet tight service level agreements (SLAs) for system recovery, especially in the event of a catastrophic system failure that required a full system restore
- **How to improve email management?**
In an attempt to control the size of the Exchange database, Besso had implemented mailbox quotas for all staff members. Although this had proved a partial success, it was only viewed as a stop-gap solution as many staff resented the imposition of mailbox limits and had begun to archive email to PST files in an attempt to get round the quota system. Generally, PST files can prove troublesome to manage: they become prone to corruption when they grow in size; they are often stored on local hard drives and they are not backed up properly.

The overall feeling at Besso was that Exchange was delivering a vital capability to the business but was requiring too much time and effort from the busy IT team. Costly workarounds had become the norm and the IT staff had become used to working within these restrictions.

SELECTING THE SOLUTION

Symantec Enterprise Vault

Besso decided that the time was right to re-evaluate their email solution with a view to making it more manageable and

finding a way to remove the troublesome mailbox quotas. Having used Phoenix Software as their preferred supplier for technical implementations and support, Besso naturally turned to us for advice. An evaluation of the current problems, technical and business objectives suggested that an email archiving solution would resolve the main issues and provide a host of additional benefits.

Symantec Enterprise Vault is the acknowledged market leader in the field of content archiving, providing the ability to capture, retain, locate and retrieve electronic records including emails and electronic files such as Microsoft Office documents. Following a product demonstration and technical analysis, Besso engaged Phoenix to design and deliver a comprehensive archiving solution using Symantec Enterprise Vault.

Gary Pruce, Group IT Manager at Besso Limited, said: "Thanks to Phoenix Software and Symantec Enterprise Vault, we will be back in complete control of our Exchange environment - recovery times can be slashed and the overall administrative burden of looking after Exchange significantly reduced."

The technical analysis session had identified the core functionality that was required from the Enterprise Vault implementation, with the following modules providing answers to each of the main issues:

- **Mailbox Archiving** - this module allows email administrators to dramatically reduce the size of each user's mailbox by archiving old email to Enterprise Vault's SQL store. This can dramatically reduce the overall size of the Exchange databases, making backup and restore much quicker and more efficient. The change in storage is transparent to the end user, as they can still click on the message icon and open the email from the archive. Reduced mailbox sizes also mean that unpopular mailbox quotas can be removed and that there is no temptation for email users to create PST files



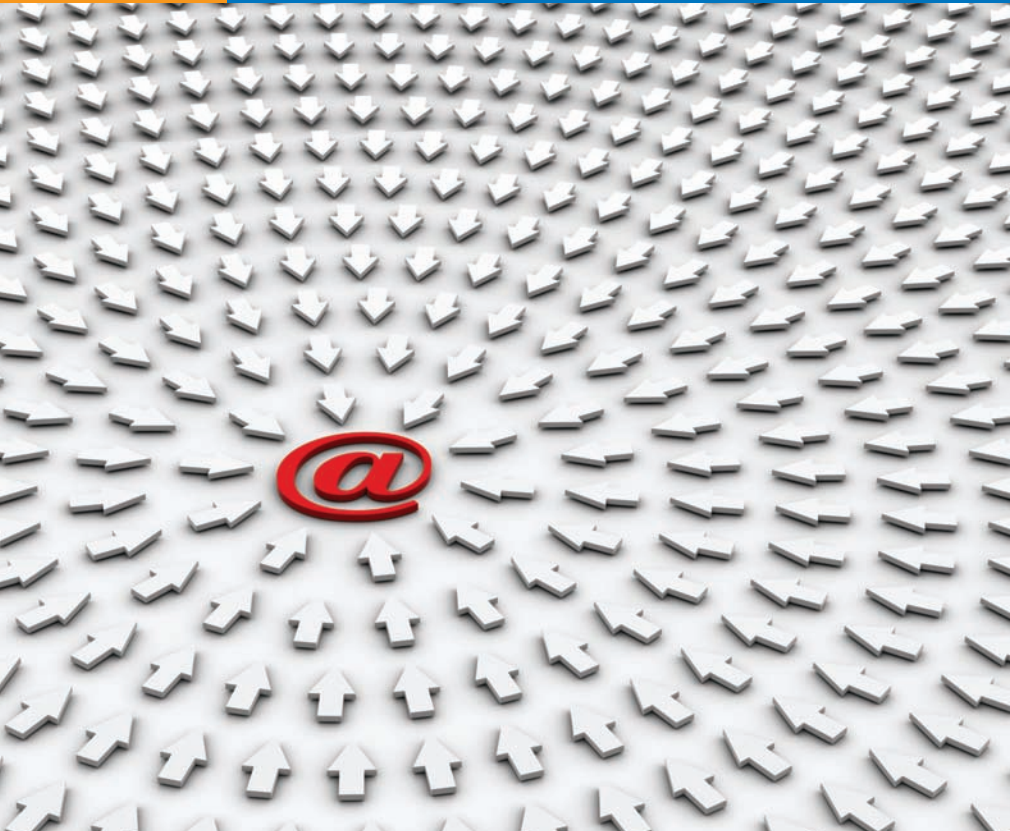
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- **Public Folder Archiving** - provides the same function as mailbox archiving, but for data stored in Public Folders within Exchange
- **PST Migration** - enables Exchange administrators to merge PST files back into the archive, ensuring that valuable corporate email data is stored centrally where it can be managed properly. Merged data from PST files becomes fully searchable, can easily be backed up and becomes subject to Single Instance Storage
- **Exchange Journal Archiving** - this module takes advantage of the Journaling feature of Exchange (a service that captures all internal and external email that reaches the Exchange server). By ensuring that all email records are captured and retained by the archive, Journal Archiving provides a fully searchable audit trail of all emails records: a key requirement to achieve compliance with many current regulations

Technical Implementations Details

With the necessary application modules identified, the software was ready to be

installed and configured. A dedicated Enterprise Vault server was installed to perform the archiving operations, with all archived email stored on the existing SQL 2000 cluster. Three separate 'Vault Store' archive databases were created to manage users' email, all company email (journal) and Public Folder data respectively.

Archiving policies were designed and tested by running an archive job in report mode, providing a detailed analysis of how the archive policies would affect the live Exchange environment. This allowed the archive policies to be fine tuned to ensure that all the objectives would be met prior to running a full archive job against the live Exchange database.

Gary Pruce, Group IT Manager at Besso Limited, concluded: "With Phoenix Software's expert help, we are now able to benefit from the powerful archiving and indexing features of Symantec Enterprise Vault. A seamless integration into our existing environment means that the new systems were up and running in no time, with virtually no impact on our email users."



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