

Solving .PST Management Problems in Microsoft Exchange Environments

An Osterman Research White Paper

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Why You Should Read This White Paper

Email systems contain a significant and growing proportion of the information assets that organizations possess. These information stores, which can include PST's, mailboxes, and public folders, are increasingly necessary to access for legal discovery, regulatory compliance and knowledge management purposes. They often are distributed throughout an organization on local desktop computers, file servers, and laptops.

However, finding all of these message stores – not to mention the information they contain – is extremely difficult using the native tools provided with Exchange and Outlook. Email administrators faced with the task of satisfying a legal discovery order, for example, must first **find** all of the data stores across an enterprise that might contain the information they need. They must then **search** through all of these data stores for the specific information sought by the requestor. They must then **provide** this information in the form required, whether on CD-ROM, on paper or in some other form. They must then **demonstrate** that they have produced all of the required information and that there are no additional information sources that might be discovered at a later date. An inability to perform all of these steps quickly and completely can lead to serious legal or regulatory problems for an organization.

This white paper discusses the problems that organizations face in managing their information. It also discusses the role that Mail Attender for Exchange and Archive Attender for Exchange can play in helping an organization to locate, search and manage all of the Exchange-related information that it possesses, regardless of its location in the enterprise.

Problems in Managing Exchange and .PST Files Effectively

Microsoft Exchange is the dominant messaging platform in use in the workplace today – Osterman Research estimates that 44% of the installed base of corporate messaging users in North America use Exchange. Microsoft Outlook is the dominant email client, in use on the vast majority of Exchange-enabled desktops. The result is that .PST files, the primary email store used in Exchange environments, have proliferated throughout the enterprise on desktops, file servers, and laptop machines. These .PST files, along with information contained in mailboxes and public folders,

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.PST Data is Not Easily Accessible

However, most of the content contained in .PST files is not easily accessible to the organization at large. Local .PST files that users generate when they archive content from their Outlook client or local .PST files on laptop computers all contain content that is extremely valuable to the organization, but that is not easily accessible through conventional data recovery tools.

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While data stored in local .PST files is technically accessible to IT staff, finding and collecting this information into a central repository is difficult, time-consuming and, ultimately, very expensive. Further, having to go through the arduous process of collecting data from local .PST files presents three additional problems. First, the entire process is very disruptive to IT staff who must stop work on other tasks in order to search through all of the locations in which local .PST files might reside. Second, the entire process can take a long time to accomplish – weeks in some cases. Third, there is no way of knowing if all of the local .PST files have been found, such as those that might be located on local drives or corporate laptops.

Enforcing Corporate Policies is Difficult

Another problem with the use of local .PST files is that corporate data retention and deletion policies are much more difficult to enforce when data stores are not centralized, centrally managed or otherwise accessible to IT staff. These policies, as discussed later in this document, are becoming increasingly important for organizations to enforce efficiently and comprehensively. Add to this the problem of uncompressed .PST files that can cause very inefficient storage of corporate information – uncompressed .PST files consume significantly more storage than compressed files, in some cases consuming 40% or more space than they would otherwise require. Mail Attender for Exchange, for example, will automatically compress attachments and automatically compact .PST files for space savings after deletion and/or compression. This is particularly important given that, according to Osterman Research surveys, growth in messaging storage requirements is the leading problem cited by email decision-makers. Inefficient storage of messaging data is a particularly important consideration for organizations regardless of size. As a result,

database and .PST file compaction needs to be performed – doing it automatically will save email administrators significant amounts of time and other problems. Further, recovering lost space can help an organization to delay the purchase of new storage systems, providing an additional benefit.

Non-Corporate Data Adds to Storage Requirements

An additional problem with .PST files is that without manageability of the content, backup applications will back up all data within the .PST files, including personal and non-corporate information. This extra data can place additional load and backup time on the backup applications, which should be using this time to backup other important and relevant corporate data. For example, a February 2007 survey conducted by Osterman Research found that 60% of organizations view increasing backup and restore times as a serious or very serious problem. As a result, organizations should implement tools and practices that can delete this unnecessary email in order to recover storage space.

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Data Compaction is Not Automatic

.PST files become inefficient storage repositories over time and need to be compacted in order to maximize storage value. Manual compaction is time-consuming and will not provide the maximum level of compaction on an ongoing basis. What is needed, therefore, is an ability to automatically compact .PST files continually without any intervention by IT staff or end users.

Organizations Often Don't Know What's in Their Infrastructure

One of the ways that IT staff can be more proactive about .PST management is by having information about the current status of these files, such as where they are located, the types of data they contain, how much compaction they require, etc. – organizations often do not have enough information about their collection of .PST files using the native tools provided with Exchange. It is important, therefore, to be able to generate reports on a regular basis on the current status of .PST files throughout the organization in order to make sound decisions about how to properly manage their .PST files and other data repositories.

Why Organizations Need Better .PST Management

Electronic discovery (e-discovery) is becoming significantly more important. One source estimates that one-half of the information included in legal discovery orders today is found in email systems. Given the increasing use of email and the growing share of business records sent and stored in it, Osterman Research anticipates that the vast majority of discoverable content will be stored in email during the next few years, making email increasingly important as a source of business records. For example, in a study that Osterman Research conducted in February 2007, it was discovered that organizations must search through email a median of four times every year, often for legal discovery purposes, although many organizations perform this many searches during a typical month.

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A key driver for the discoverability of email content is the set of amendments to the Federal Rules of Civil Procedure (FRCP) that went into effect on December 1, 2006. These rules focus much more attention on Electronically Stored Information (ESI), placing greater emphasis on electronic content for discovery and other purposes. Another important driver that is making email content more important for discovery purposes is the set of court decisions within the past few years that have made the holder of electronic content liable for most or all of the costs of legal discovery if the opposing party can demonstrate that the discoverable information is of value in a case.

Regulatory Requirements are Becoming More Stringent

Regulatory requirements are also placing increasing emphasis on the role of email and other electronic content as a source of corporate records. There are literally thousands of regulations that require organizations of all sizes to retain electronic content for purposes of compliance. Regulations are as diverse as Sarbanes-Oxley and HIPPA, and regulations such as the American with Disabilities Act and the Toxic Substances Control Act include provisions for retaining corporate records for various lengths of time. Given that a growing proportion of these records are generated, sent and stored through email, it is becoming more important for organizations to retain and have access to these records for long periods of time.

.PST Files Contain Corporate Memory

Another important reason to gain access to local .PST files, in addition to centralized data stores, is that in many cases, they simply contain most of the information that an organization possesses. Because about three-quarters of the information that email users need to do their jobs is somehow bound up in email, local .PST files and other message stores are a critical source of information for knowledge management and data mining purposes. This information is important for the organization to access, since it is useful for email users to access it as they do their work, and it contains a record of corporate communications with key clients, business partners, as well as other intellectual property. An inability to access these records quickly and efficiently means that corporate knowledge – the most important single asset that most organizations possess – is simply lost.

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The growing need to archive email, including content from .PST files, makes it increasingly important to implement an archiving product that can automatically index incoming content, place this content into an archive or otherwise make it easily accessible and then make it easily searchable on demand. The importance of managing .PST files adequately has not been lost on organizations – a study that Osterman Research conducted during February 2007 found that when considering the return-on-investment or need for an archiving system, nearly three in five organizations consider the ability to reduce risk by centralizing .PST files or similar data stores to be important or very important.

The Benefits of Using Mail Attender for Exchange and Archive Attender

Mail Attender and Archive Attender provide a number of important benefits for organizations that rely on .PST files as their repository of corporate email information:

- **Locate and Manage Distributed .PST Files**

Mail Attender allows email administrators to locate and manage distributed .PST files throughout an organization, regardless of where the files may be located. Because most organizations cannot readily access all of their .PST files, simply being able to manage all of this content is a major advantage of Mail Attender compared to the way that most organizations manage their information today.

Archive Attender provides additional benefits for e-discovery, regulatory audits and other instances in which email data must be searched and extracted quickly and with minimal impacts on IT staff and others within the organization.

- **Search .PST Content by Customizable Criteria**
Information in these .PST files can be searched and recovered quickly and easily without the difficulties associated with having to extract data from each file individually. For example, a discovery order might require all email to or from any of ten people that contains a certain set of keywords to be provided to opposing counsel. Having to find and search hundreds or thousands of individual .PST files for this information can be incredibly difficult, time-consuming and costly.
- **Comply with Legal and Regulatory Requirements**
As a result, Mail Attender permits much more rapid compliance with discovery orders, regulatory information requests, internal information requests and other demands for information. This is critical, since compliance, particularly with regulatory requests, often requires rapid turnaround.
- **Easily Archive .PST Data**
Archive Attender provides additional benefits for e-discovery, regulatory audits and other instances in which email data must be located, extracted and secured quickly and with minimal impacts on IT staff and others within the organization. By archiving .PST information, the data can be secured for regulatory compliance, e-discovery and data protection applications.
- **Capture and Report .PST Statistics**
The ability to measure and report on information contained in .PST files is significantly improved with Mail Attender. The ability to report on the content of .PST files across the entire organization is important as a key step in understanding the information assets that organizations possess.
- **Delete Unnecessary Information**
Another important benefit provided by Mail Attender is that it can delete personal and non-corporate email, thereby allowing shorter backup windows, saving valuable storage space and removing potential damaging content. Given that these types of email do not contain business records, deleting them is an important step in maximizing the value of storage.
- **Compact .PST Files**
Mail Attender can automate the data compaction process in order to reduce .PST file size, further reducing

both the impact on overall storage requirements and IT staff investments in compacting files.

- **Monitor Data Trends**

The reporting capabilities provided in Mail Attender allow organizations to be much more proactive about how they manage .PST files. By displaying data trends and allowing IT staff to review their infrastructure with regard to .PST files, action can be taken to minimize problems early before they become larger and more serious issues.

- **Enforce Retention and Deletion Policies**

Archive Attender allows an organization to enforce its policies regarding data retention and deletion. Because different types of data are subject to different retention requirements, it is important to be able to manage these policies efficiently and with as little impact on IT staff and end users as possible.

- **Simple User Retrieval of Archived Messages Via Stubs**

Archive Attender makes the retrieval process easy through the process of 'stubbing'. By replacing documents that have been placed into the archive with a stub in the original location, the archived documents can be easily retrieved.

- **Grant Access Rights Without a Client Installation**

Archive Attender permits flexible viewing of archived data. By allowing administrators and others, who can be given granular access rights, to access the archive through their Outlook client or Outlook Web Access, data access is made more flexible and easier. Further, Archive Attender does not require the creation of an additional database or the deployment of new hardware.

These capabilities allow an organization to comprehensively manage its content within .PST files, mailboxes and public folders. Policy management is made dramatically easier for Exchange administrators because they can manage corporate policies for all users, using all message store content in all locations from a central management console. Administrators can apply certain policies to particular users or types of content, such as senior managers' communications with external auditors for Sarbanes-Oxley compliance instead of adopting a 'one-size-fits-all' approach. Further, Mail Attender and Archive Attender work transparently without any intervention from end users or any impact on the way they work in Exchange.

These capabilities allow an organization to comprehensively manage its content within .PST files, mailboxes and public folders. Policy management is made dramatically easier for Exchange administrators because they can manage corporate policies for all users, using all message store content in all locations from a central management console.

Add to this the ability to archive and compress content, such as large attachments, regaining valuable storage space and significantly slowing the growth of storage in most mail environments.

Summary

Information is the most important asset that organizations possess and most of this information is stored in individual mailboxes and other message stores (including .PST files) that are not centralized or centrally managed. Organizations that use Microsoft Exchange typically cannot access this information easily or quickly, and so data is stored in a wide variety of locations and is generally inaccessible to the organization unless IT spends significant amounts of time and energy locating, indexing and accessing this content. When required to find information in support of legal discovery or regulatory requests, for example, conventional data access methods are highly disruptive to IT staff, they are expensive to implement and they consume a significant proportion of IT staff time.

Information is the most important asset that organizations possess and most of this information is stored in individual mailboxes and other message stores (including .PST files) that are not centralized or centrally managed.

Mail Attender and Archive Attender provide capabilities to find all information stores (including .PST files) used throughout the organization, to search across these disparate information stores for required information, to report on the content housed in these data stores, to archive data according to corporate policies and to reduce overall storage requirements. The result is that information management is dramatically improved and IT staff are freed to perform other tasks that offer greater value to the organization.

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