

## Archive Attender for Exchange

Sherpa Software's Attender products provide flexible email archiving, management, and e-discovery capabilities for Lotus Notes and Microsoft Exchange environments. This brief summarizes Sherpa's Exchange archiving product, Archive Attender for Exchange, and presents our thoughts on it and its industry context.

### **Product Summary**

#### **Main Features**

- Email archiving capabilities for Microsoft Exchange.
- Policies-based archiving of email by user. Active Directory queries can be used to automate policy provisioning.
- Indexed archive to support user and administrative searches.
- Nonproprietary data store, which simplifies administration and ensures that data is easily accessible.
- User search and restore capabilities integrated into Microsoft Outlook and Outlook Web Access (OWA).

#### **Core Components**

- *Application console.* The application console allows administrators to define policies, apply policies to users, and configure archive locations for Archive Attender. It also enables administrators to manage the data stores and search across the various archives.
- *Windows service.* The Archive Attender service connects to the Exchange server and archives email based on the policies defined. Archiving can be scheduled to occur during a specific time window to minimize the performance impact on the Exchange Server.
- *Web application.* The Internet Information Server (IIS) Web application facilitates user search and retrieval capabilities. It can be accessed directly or from within Outlook or OWA. A special folder that links to the Web application is created in the mailbox folder structure.

Archive Attender does not require a database for storage of archived data. It can use any accessible local or network file system as a potential data repository. Archive Attender extracts email from the Exchange message store as an Outlook message file (.MSG). It compresses the .MSG files in this native format and stores them in a folder structure on the identified file system.

Archive Attender archives email based on policies assigned to users. To keep the archiving process fast and efficient, Sherpa uses only the sender, subject, age, and size as policy criteria. Archive Attender can also archive based on Exchange mailbox quotas.

Users can search for archive data through the Web application (directly or via their email client), or they can retrieve it using *message stubs* left in their mailboxes. Message stubs are partial messages that replace archived email in a user's mailbox. They contain a summary of the archived messages and include a Web link that allows the user to retrieve the actual message through the Web application.

## Pricing

Pricing is normally \$4.10 to \$10.25 per user per year, based on a 3-year average, and the software is sold as a perpetual license. Software maintenance is offered at three tiers—silver, gold, and platinum—and support desk availability varies by tier. The cost for the tiers is based on a percentage of list, specifically 20%, 25%, and 35%, respectively. A 1,000-user Exchange environment costs between \$5.90 and \$7.50 per user per year, depending on the level of maintenance purchased.

## Comments and Observations

The email archiving market is still maturing. With the rising concern about e-discovery requirements and compliance obligations, organizations see email archiving solutions as a way to put some structure around email, the ultimate unstructured communication medium.

Sherpa Software has been providing mailbox management software since 2000. It introduced Mail Attender for Exchange in 2001, and Archive Attender for Exchange in mid-2004.

Sherpa sees Archive Attender's competitive strengths as:

- *Simple installation and setup.* Sherpa claims that Archive Attender can be installed and running within 30 minutes. Obviously, this assumes that email policy and storage decisions have already been made.
- *Bang for the buck.* Archive Attender supports most of the functionality found in much higher priced email archiving applications.
- *No client software requirement.* Message stubs or access search capability can be used without additional software on the workstation, which eases installation requirements. As described above, Archive Attender creates a folder in the user's mailbox that links to the Web application to facilitate user access to the archive. The special folder is created when archiving is enabled on a mailbox through the application console.
- *Email archiving in native format.* Because messages are archived in their native format, they maintain the associated metadata and are easily transportable. Data can be imported into other applications, such as e-discovery or ECM applications.
- *No database back end.* The standard file system is used as the data store, simplifying the product architecture and maintenance.

We see a number of interesting features in Archive Attender:

- *Archiving of mailbox data based on Exchange mailbox quotas.* Standard Exchange mailbox quotas are typically only marginally effective. In most cases, when users encounter a mailbox quota, they work around it by creating offline folders (.PST files) or demanding that the help desk raise their limits. Archiving based on mailbox quotas allows administrators to stick to the quota limits and keeps data accessible to users.
- *Ease for users.* The Web application allows consistency for searching and viewing archived email between full-blown Outlook and OWA. Viewing archived messages when using OWA requires the client PC to have Outlook installed on it. If Outlook is not installed, messages must be restored to the mailbox before they can be viewed, forwarded, and replied to.
- *Various message stub formats.* Archive Attender supports plain text or HTML-formatted message stubs, depending on size constraints (i.e., small stubs in plain text or bigger stubs in HTML). Additionally, administrators can choose to leave the message body in the stub. This allows the native search functionality within Microsoft Outlook and OWA to function against this content.

- *Policies applied to public folders.* Public folders often become a dumping ground for data in an organization. The ability to apply archiving policies to them eases the administrative burden and allows disposition to be centralized.
- *User Archiving.* Archive Attender can be configured to allow users to archive their own messages. Using Outlook categories, they can identify the messages they want archived. User maintenance is often not effective, but this functionality might prove helpful for functional mailboxes where records and compliance retention are important.
- *Advanced policy criteria.* Through integration with Sherpa's Mail Attender product, organizations can define more advanced policies based on the actual message content (e.g., message body or attachments). While not a common requirement, this functionality is often required during internal investigations or to meet compliance obligations.

Archive Attender can be configured to process email directly from the user mailbox for storage management or from a journal mailbox to meet compliance obligations. By supporting storage management as well as functioning as a compliance archive, Archive Attender allows organizations to meet both requirements with a single product.

Search capabilities become a problem for users any time their data is split between two systems. This is especially true for email archiving solutions. Having to search the mailbox and archive separately is cumbersome. Explaining complex archive rules to users is not the answer, as rules are often difficult to understand and quickly forgotten.

Sherpa has attempted to address this problem by offering the ability to leave the message body in the message stubs. This allows the email client search functions to search this content in the message stubs. This is a good step, but the email archiving industry needs to move toward integrated search capabilities that can span documents on the file system, email in the mailboxes or archive, and other Web data sources.

Recent amendments to the Federal Rules of Civil Procedure have made e-discovery a major driver for implementing email archiving solutions. Sherpa's Archive Attender is well positioned to meet the demands of e-discovery and storage management for small and mid-size organizations at a reasonable cost.

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