

# Email Management, Archiving and Retrieval

The simple and affordable solution for archiving emails directly from Outlook



With ever increasing email volumes and storage demand on mail servers, your operations may be under increasing pressure to retain and readily access e-mail communications. This is further exacerbated by increasing legislative pressures demanding much faster access to e-mails and content.

**e-MARC** from e-docs is a powerful email management, archiving and retrieval solution offering the following advantages:

- Provides fast and ready access to emails and content - including attachments
- Frees up storage space on the mail server(s) and provides a back-up
- Securely archives all messages and attachments in a central vault
- Stores only a single copy of every message sent and received
- Imports and stores existing emails and .PST files
- Total integration with Outlook and Windows

## Key Features of e-MARC Adding Emails to the System

- **e-MARC** operates in conjunction with Microsoft Exchange email server
- No software is required on the mail server
- **e-MARC** does not interfere with the transmission of emails; rather a copy is used
- Administrators set business rules which determine which messages are to be retained
- Required emails are stored in a secure repository outside the mail server
- Metadata is applied which makes searching for the message and its attachments possible
- Only a single instance of each message is retained, reducing storage requirements

## Email Storage

An email server is not an efficient method of storing information, so the ever increasing volume of messages and attachments becomes a serious issue. Two approaches are often taken to deal with this: capping mailbox size or adding more storage.

If mailbox capacities are capped, then users have the responsibility for ensuring that correspondence essential to the organisation is retained; unfortunately they do not necessarily know what might be needed in the future, perhaps to support a contractual dispute. **e-MARC** relieves them of this responsibility.

Continuing to add more storage to the mail server is also not necessarily appropriate. Apart from any other consideration, Microsoft Exchange Server has a limit of 16GB on the storage size, before requiring a costly upgrade.

**e-MARC** sends a copy of each email to a repository or archive at the point of sending/receiving. This is always available, so that administrators can routinely clear down the mail server – safe in the knowledge that users can access their messages from the repository.

All organisations are required by one or more regulatory bodies to retain certain documents. This extends from companies' legislation and the requirements of tax authorities for all organisations, to those specific to certain trades and sectors. The latter includes, but is not limited to, regulation of financial services – such as the US Sarbanes Oxley Act and the UK's FSA regulations, and rules governing medical matters.

The cost of providing access to emails for internal compliance officers, the courts and authorities can be prohibitive if the correct tools are not available.

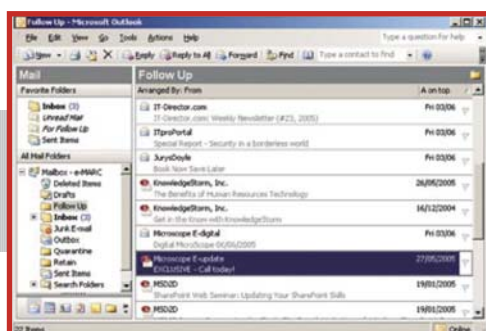
**e-MARC** simplifies the searching for and retrieval of messages and attachments, reducing to minutes the time taken to find relevant documents – instead of the days or weeks that it might otherwise take.

## Knowledge/Information Management

With the increasing use of email, the proportion of company intelligence that is contained within these messages is rising. Retrieving a message through the mail client is a slow process, and generally only possible by the sender or recipients; knowledge sharing is not straightforward.

**e-MARC** stores index information in a database; users can therefore quickly find and retrieve emails by searching index fields and the content of messages and their attachments. Subject to permission, this information is also available to others

Screenshot of mail client showing **e-MARC** links in action





### e-MARC Step-by-Step

**e-MARC** does not interfere with the transmission and processing of emails in any way: it operates with copies.

- Using tools within the mail server (journaling), a copy is taken of each message sent and received.
- Each message is then processed by the Archiving Service. Based on business rules established by the administrator, **e-MARC** determines whether a message is required (by default all messages are retained).
- If required, index information (metadata) is extracted; this is available for later search and retrieval. Typical extracted information includes:
  - Sender
  - Recipients (including Bcc)
  - Subject
  - Date Sent
  - Text content of the message and all text-type attachments

- The email is added to a secure repository in native format (.EML or .MSG) and the index information is applied.
- Access permissions are set according to security rules. Only administrators can delete messages or change the metadata.
- Life-cycle management (if required); a minimum period during which the message is fully protected from deletion
  - whether intentional or accidental
  - even by administrators. This is usually a requirement in meeting compliance regulations.

### Accessing Emails From The Repository

#### Standard User Access From The Mail Client – Using e-MARC™ Links

Allows users to access messages from the repository directly from the Outlook mail client.

Using the management console, administrators set a threshold (e.g. 90 days). **e-MARC** Links searches for all emails in the mail server which are more than this age. Where one is found, the software deletes the message from the mail server and replaces it with a 'stub', or link, to the copy message in the repository. This stub is approximately 1kb in size, so that the mail server storage requirement is very much reduced.

Users continue to access messages as previously; the only difference is that the mail icon changes to denote that it is in the archive.

### Key Features of e-MARC Links

#### Managing Mail Storage

- **e-MARC** Links allows administrators to set a maximum age for messages in the mail server
- Replacing aged messages with stubs significantly reduces the amount of data within the mail server
- Only a single copy of each message is retained, so reducing the overall storage requirement
- The **e-MARC** repository provides tools to address virtually any type of file storage, including (but not limited to):
  - RAID array
  - NAS or SAN devices
  - CD/DVD or optical disc jukeboxes
  - tape libraries
  - content management systems

#### Accessing Emails from the Repository

- Users see only a change of icon in Outlook; the message is displayed when the link is clicked
- Windows or web-based search tools are available for administrators and compliance officers, and for advanced 'knowledge workers'
- Users can search index fields and the content of messages and attachments

### Additional Features

- **e-MARC** uses industry-standard database technology – Microsoft® SQL Server or optionally Oracle®.
- The repository can be extended into a fully-functional document and records management system for files of all types. This provides the means to manage all documents and records in a single unified system.

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