



Enterprise Vault Competitive Paper Mythbusting Microsoft Exchange 2010

This document discusses some of the common misconceptions about Exchange Server 2010; in particular relating to its claimed archiving and eDiscovery functionality.

If you have any feedback or questions about this document please email them to IG-TFE@symantec.com stating the document title.

This document applies to the following version(s) of Enterprise Vault: 9.0, 10.0

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Document Control

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Introduction

Meet Stuart, an experienced Exchange Administrator.



Stuart is in the process of putting together a proposal to migrate to Exchange 2010, and based on what Stuart heard from Microsoft life will be a lot easier on this new messaging platform.

Stuart has a lot of headaches with his current Exchange 2007 environment – not only is it creaking at the seams with backups failing and ever increasing disk requirements, it also has some functional shortcomings that his organization can no longer do without.

Stuart very carefully put together all his requirements for the new platform – specifically prioritizing problem areas such as storage, platform, end user experience, PST migration and eDiscovery.

On initial inspection it appears that he was right to pin all his hopes on Exchange 2010 satisfying all his requirements – but will all of Microsoft’s promises stand up to the Mythbusters test?

Myth #1: Cheaper storage means less capacity headaches

Microsoft said:

“Store I/O reductions and replication improvements allow the use of cheap disk and negate the need for backup or single instance”

Stuart understood:

“I can use cheap disk with the solution meaning I don’t need to overly worry about capacity”

The reality:

Upon closer inspection there are some obvious problems with Stuart’s understanding. In order to reduce storage I/O requirements Microsoft had to sacrifice some of the efficiency within the storage engine, more specifically there is **no single instance storage within Exchange 2010**. By simply migrating the data from Exchange 2007 (or earlier versions) to Exchange 2010 Stuart will already have to provide a

considerable amount more storage just to host the same amount of mailbox data, and double or quadruple that storage to allow replication.

Microsoft's own guidelines (Source: Technet) quote up to a 20% increase in DB size as a guideline, Gartner's investigations show up to a 30% increase in size and various independent consultants have reported up to 100% database size increases during a migration.

Furthermore the Exchange 2010 storage engine only provides **limited compression**, and a **lack of storage choice**. Exchange 2010 also **lacks the ability to tier data over time** - why should older, infrequently accessed data be on the most expensive layer of storage?

Myth #1: Cheaper storage means less capacity headaches



Is throwing storage at the ever increasing problem of large scale retention really a good solution?

No. Exchange Server 2010 lacks the enterprise class features required of a large scale storage solution; such as storage freedom, single instance storage, full compression support for of different types of storage (to suit the data being stored) and storage tiering.

Exchange Server is a great messaging server *but...*

A good information management solution would firstly remove all the data from the primary application (freeing it up to focus on what it does best) and then provide compression and single instancing¹ of all the data it stores. In Enterprise Vault this capability is entirely storage agnostic meaning it does not rely on any specific type of storage device. This also means that data can be stored on any combination of supported storage devices - allowing data to be tiered and moved over time to ensure that as data ages it gets stored on the most suitable storage medium. These features ensure that archived data has the smallest possible storage footprint and is stored on the most suitable storage medium.

¹ Down to the attachment level and across all Exchange Servers

Myth #2: Exchange 2010 provides enterprise-level archiving capabilities

Microsoft said:

“Microsoft Exchange introduces built-in integrated email archiving, retention, and discovery capabilities that save costs and simplify the process of preserving business communications”

Stuart understood:

“Exchange 2010 gives me all the archiving and retention capabilities I need for my mail data”

The reality:

With Exchange Server 2010 Microsoft made their first entry into the email archiving market. As is often the case with a product's first entry into the market it has a number of shortcomings, and doesn't have the functional depth of a mature archiving platform. Some of the shortcomings include:

- No solution for non-mail data - could you benefit from single instancing between Email, File, SharePoint and other repositories?
- No general optimization of those applications/platforms by removing older data, keeping the primary application as lean as possible
- No solution for storing Journalled data – there is no mailbox big enough to hold all the data, even in Exchange Server 2010. And what about single instancing?
- No solution for older Exchange Server versions – you may want to target different instances of Exchange Server, or archive the data from an older Exchange environment before migrating to Exchange Server 2010.
- No solution for Public Folders
- A Microsoft Enterprise Client Access License is required for archiving capabilities.

Myth #2: Exchange 2010 provides enterprise-level archiving capabilities



Is Exchange Server really a good data management solution?

No. For many customers archiving is about more than just Exchange Server. It can mean many things to different customers but the bottom line is that solving storage management headaches, application by application, is an out-dated and short sighted way to resolve the larger problem.

Exchange Server is a great messaging server *but...*

Enterprise Vault’s unique value proposition means that it is positioned as a platform from which data from many different applications and environments can be managed (e.g. file systems, SharePoint and Instant Messaging). While requirements for data management may stem from data within Exchange Server they later may encompass data from other sources.

Platform based solutions outside of the individual applications are the only way to cater for this expansion of requirements.

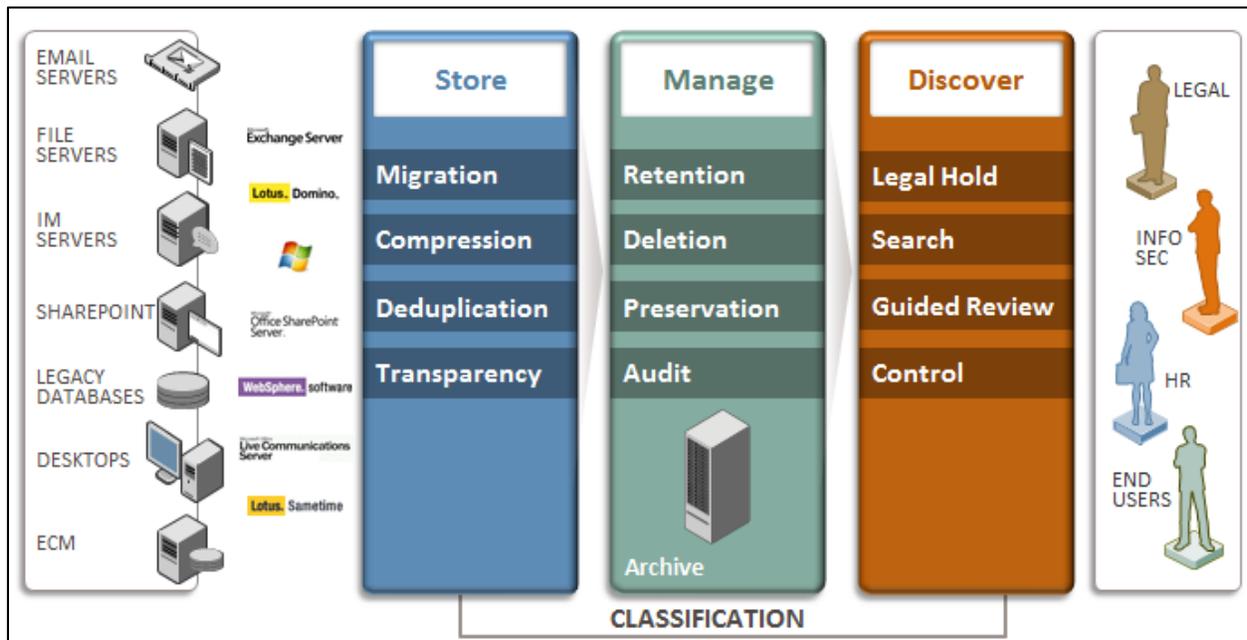


Figure 1 - Symantec Enterprise Vault - An Archive Platform

Myth #3: Exchange Server 2010 provides the best possible end user experience

Microsoft said:

“Microsoft Exchange helps users be more efficient and productive across platforms and locations by giving them access to email, voice mail, instant messaging, SMS text messages, and more...”

Stuart understood:

“All my end users requirements are taken care of”

The reality:

User productivity is paramount to all customers, so whatever process is put in place to help deal with ever increasing data volumes it must provide a seamless experience to help them to work more efficiently. Exchange Server 2010 introduces a feature known as the personal archive, through which users are able to access archived data stored outside of their Exchange mailbox. The personal archive provides limited end user functionality, specifically in the following areas:

- No access to archived data when offline
- Only Outlook 2007 and Outlook 2010 can be used to access the archive, no older versions
- Search experience is inconsistent
- No quota capability for the personal archive
- Limited Mac support
- Limited mobile support
- Limited delegation support

Myth #3: Exchange Server 2010 provides the best possible end user experience



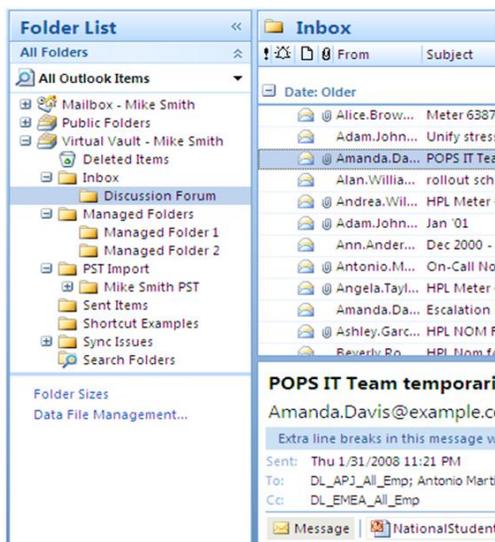
Will the Exchange Server 2010 personal archive satisfy most user expectations for long term data retention and access, and provide a seamless end user experience?

No. User interface is one of the most important factors when end users workflow is impacted by archiving. Key factors such as offline access to data can be the critical difference between acceptance and rejection of such a solution.

Exchange Server is a great messaging server *but...*

Enterprise Vault provides full access to archived items both on and off line. The user interface is provided via Virtual Vault which presents items to end users via integration to their Outlook client which represents their archive. Users can search, browse, view, archive, restore and delete items in their archive dynamically, using drag and drop, and importantly using the same workflow as they are used to when dealing with their primary mailbox and even PST files.

This user experience does not change as the user's connection state to Exchange changes. This applies to Outlook 2003, 2007 and 2010.



- Outlook 2003, 2007 and 2010 support
- Seamless Integration
- Full Offline Access
- Drag & Drop
- Forward, Reply, Reply to All, Delete,
- Save As, Save Attachment and Print
- Full support for delegation

Figure 2 – Virtual Vault + Offline access – a familiar user interface

Myth #4: Exchange Server 2010 will eradicate all my PSTs

Microsoft said:

“Microsoft Exchange PST Capture allows you to search for PST files on computers in your organization and then import those files to mailboxes in your organization”

Stuart understood:

“I now have all I need in order to eradicate PST files once and for all”

The reality:

PST migration is about more than just the movement of data from PST files. A project to eliminate PST files is normally wide ranging and complicated by nature and therefore the tools to support such an effort must match this in terms of functionality and expectation.

Microsoft PST Capture is only aimed at small-medium organizations with very few PST files to migrate. PST Capture only allows import to Exchange. Is this really where you want to store PST file data long term?

Workflow is important because there are many phases of a PST migration that require attention and thought before, during and after the actual data migration. Compared to other PST migration products Microsoft PST capture lacks in the following areas:

- Microsoft PST capture requires an agent installation on every client to be searched.
- Large lists of PST files found are difficult to manage
- Cannot distinguish between end user created PST files and SharePoint created
- Limited ownership determination and otherwise requires a manual assignment
- No reporting capabilities at all
- Single PST per collection, no multi-threading
- No process handling for locked PST files
- No end user communication – what is happening?
- Limited information on failure
- No SIS / Limited compression
- No offline access to the migrated content in personal archive
- No options for cleaning up PST files post migration
- No option to remove the PST from a user's profile following successful migration

Myth #4: Exchange Server 2010 will eradicate all my PSTs



Does Microsoft PST Capture provide an effective way of migrating PSTs, and more importantly is the Exchange Information Store an appropriate destination for PST files?

The answer is no on both accounts. PST Elimination is more than just migrating data - workflow and flexible tools are necessary to make this a reality and Enterprise Vault provides both. Importing PSTs into Exchange will only make large Exchange stores more difficult to manage. It would be far more efficient storing PSTs in an archiving solution.

Exchange Server is a great messaging server *but...*

Enterprise Vault provides tools and capabilities which gives the ability to conduct and control a PST elimination project from design to finalization while importantly not requiring that the PST data is ingested into Exchange Server. The inbuilt tools allow customers to find and migrate PST data from file servers and end user's desktops/laptops while giving options around parallel processing of PST files, end user notification, post processing and error handling for corrupt or password protection.

Myth #5: Exchange Server 2010 provides capable eDiscovery tools

Microsoft said:

“Microsoft Exchange Server 2010 introduces built-in integrated email archiving, retention, and discovery capabilities that save costs and simplify the process of preserving business communications”

Stuart understood:

“Exchange 2010 gives me all the tools I need in order to put a solid eDiscovery process in place”

The reality:

eDiscovery and compliance requirements can vary greatly from industry to industry and country to country. The Electronic Data Reference model² (EDRM) attempts to establish guidelines for conducting discovery requests against electronic data. The ability to search, preserve and review electronic data is key to the model.

Exchange Server 2010 offers basic keyword searching across primary and personal archive mailboxes. Searches can only be run manually, and there is no native capability to schedule searches to run automatically. The results of search can then be exported and duplicated to discovery mailboxes where compliance officers can conduct a review of the data.

The problem with this model is that when searches bring back hits numbering more than a hundred or so items, reviewing the items quickly becomes practically impossible. The marking of items becomes largely a process of trawling through large lists of items inside a user’s mailbox. This makes sharing the review work among more than a single reviewer difficult to achieve.

Finally the application of a preservation order on data (legal hold) is possible but must be levied against entire users mailboxes (i.e. a single relevant item found in a user’s mailbox means that the entire mailbox is placed on hold). This hold request is applied using the Exchange System Attendant, which runs on a schedule and hence a legal hold order may not actually be applied until several hours after it was placed.

²www.edrm.net

Exchange Server 2010 eDiscovery lacks in a number of key areas, as summarized below:

- Not all items are indexed
- No review workflow
- No way of proving chain of custody
- No granular legal hold
- No way of giving “Legal” control
- Full EDRM workflow
- No searching for non-Exchange data

Myth #5: Exchange Server 2010 provides capable eDiscovery tools



Does Exchange Server 2010 provide an effective eDiscovery tool that will satisfy most customers search, preservation and review requirements?

The answer is no. By comparison, Enterprise Vault customers can utilise the Discovery Accelerator workflow or the Clearwell eDiscovery platform to provide full control over searching of all content (including un-archived content) and then presenting the search results for easy review by one or more reviewers. Searches can be run manually or scheduled to run on a regular basis – as is very common to ensure the results set is as up to date as possible. The review workflow also provides an easy mechanism to mark and tag items as relevant or not. Legal hold requests are applied immediately, as a high priority, and can be applied at the individual object level.

Exchange Server is a great messaging server *but...*

Ultimately, the most significant eDiscovery costs are incurred in the review phase and Enterprise Vault allows customers to reduce reviewable volume at several key points in the eDiscovery process.

Furthermore Symantec’s Clearwell eDiscovery solution set provides the ability to take keywords provided by legal or IT and perform targeted keyword based collections. After collection, customers perform pre-processing where they de-NIST their data, and filter by custodian, date range, and file type prior to processing, reducing the data sent to analysis and review.

The volume of data is reduced during each stage, but our customers find the most dramatic data reduction typically occurs during the filtering, search, and ECA phase. Here they’re filtering by domain, senders & recipients, language, etc. and performing interactive and defensible Transparent Searches. Customers will typically reduce their reviewable volumes by 80-90% during this phase, representing a dramatic cost saving.

Summary

Exchange Server 2010 lacks functionality in a number of key areas when compared to a mature archiving solution, as summarized in the following table.

Feature	Enterprise Vault	Exchange 2010
SIS reduces storage requirements	Yes	No
Archives Journal Mailbox	Yes	No
PST Lifecycle Management	Yes	Partial
Access to archive offline	Yes	No
Integrated solution for EDRM	Yes	No
Legal hold on individual mail item level	Yes	No
File types searched	500+	53
Archive multiple sources (not just Exchange)	Yes	No

Table 1 – Archiving and eDiscovery feature comparison

About Symantec:

Symantec is a global leader in providing storage, security and systems management solutions to help consumers and organizations secure and manage their information-driven world.

Our software and services protect against more risks at more points, more completely and efficiently, enabling confidence wherever information is used or stored.

For specific country offices and contact numbers, please visit our Web site: www.symantec.com

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