

E-mail Archiving and Management, Part 2, From Niche to Core Component

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In the e-mail management marketplace (EMM), a shootout is being waged among a plethora of distinct approaches. Leading infrastructure providers, like Computer Associates ([CA](#)) and [IBM](#), are offering information life cycle solutions that include EMM. Enterprise content management (ECM) providers, like [FileNet](#), [Hyland Software](#) and [Hummingbird](#), are acquiring or developing EMM capabilities to scale up to manage larger content volumes. And ECM vendors like Stellent are leveraging strategic partnerships to provide EMM.

Application service providers (ASPs), like [Fortiva](#) and [GlobalRelay](#), are offering hosted EMM capabilities. Disk management ([EMC](#)) and e-mail hygiene vendors (like [MessageGate](#), and Symantec), are extending capabilities into EMM. And then there are the pure-play EMM players like [Zantaz](#) and [ZipLip](#). How this dynamic market shakes out will be much clearer in a couple of years, but at this point, users are bombarded with a variety of technologies and architectures to choose from.

[GlobalRelay's](#) e-mail & instant messaging (IM) archiving services claim to offer the fastest search, retrieval and monitoring capabilities in the world. GlobalRelay offers hosted e-mail and IM archiving and perimeter security technology through its data centers. Its offerings provide businesses with secure offsite storage and backup while addressing compliance, privacy, security, business continuity, corporate governance, audit and litigation requirements.

GlobalRelay purports to have provided outsourced message archiving solutions without a single incident of data loss in more than six years. The company will customize a technology service solution to meet unique needs and can support a multinational enterprise with geographically dispersed servers, including multilingual requirements. The company focuses on certain key business segments that have high compliance requirements: public companies; health care; law firms and legal applications; and architecture, engineering and construction.

At [Hummingbird](#), Michele Kersey, industry manager, Commercial Sector, sees some clear trends that have developed in the past year or so. "We've seen the IT and RM [records management] professionals demanding that e-mail archiving and enterprise content management solutions be seamlessly integrated for a complete life cycle solution," Kersey says. "In the past, competing approaches have been pursued by IT and RM practitioners. IT professionals consider the job done with e-mail archiving, but such storage solutions omit critical records retention and disposition measures and do not address legal holds during discovery and litigation. The tide is changing such that IT and RM professionals are in the current together, better addressing overall organizational requirements and broadening the benefits of a synchronized strategy."

Hummingbird focuses on front-end collaboration and RM declaration and classification capabilities, and partners with e-mail archiving solutions such as Symantec's Enterprise Vault to gain the benefits of content and storage solutions.

[Hyland Software](#) is an ECM vendor positioned to attack mid-market enterprises, which are by definition less demanding, perhaps explaining Hyland's relatively late and low-end entry into the marketplace in November 2005. According to Ken Burns, analyst relations manager, "Our entry reflects our market focus and makes sense for our customers. Once we listened, we provided a basic capability to satisfy fundamental compliance and storage needs."

The new capability is designed on top of a different database structure (vs. the company's OnBase ECM product) that can scale to handle the large volumes that e-mail management demands. "It's a flat database with maybe 40 tables that allows for quick retrieval," says Coleen Alber, product evangelist. Hyland is piloting its approach at a handful of customer sites.

[IBM](#) provides a similar holistic ECM approach to e-mail management including records management capabilities, but with a heavier emphasis on integrated backend storage management. "The thing to emphasize is that the IBM solution uses an ECM bus architecture, and e-mail management is just another module that can be plugged in. The data is stored in one place and doesn't (need to) move," stated Wayne Yung, content IT specialist for IBM. "Our EMM technology is based on an ECM approach; we're not an ECM vendor that just bought an e-mail archive vendor to gain that capability."

Proving that software alliances make for strange bedfellows, IBM bolsters its e-mail filtering and management capabilities by partnering with iLumin, recently acquired by key IBM competitor CA. On the storage back end, IBM integrates with its own storage management solutions, including Tivoli Storage Manager. IBM's CommonStore, its service-oriented architecture-based (SOA) e-mail management module, was upgraded last year with IBM's ContentManager Version 8.3 refresh. Improvements include integration with IBM's Records Manager, more efficient single-instance storage, component archiving (separating the attachments when needed) and annotation support, which allows for graphical or text-based annotations stored separately as an overlay with e-mail messages, which can be searched through DB2 NetSearch Extender.

[Open Text's](#) EMM customers include UBS, Merck, Aventis, the U.S. Treasury and Hitachi Data Systems. It has worked to tighten integration between its records management and archiving products, and, as a result, its software can identify an appropriate storage device for an e-mail or other record based on its classification, and ensure that upon classification it is immediately stored on the appropriate hardware. For example, as soon as an e-mail is classified as SEC 17a-4 relevant, Open Text automates the process of storing that e-mail on the required WORM device in an organization's mixed storage environment. Its e-mail and archiving release this spring will build on those capabilities.

Open Text reports its advantages include managing, archiving and applying uniform records management rules to content in multiple systems--e-mail, SAP systems, etc. To meet the need for rigorous classification of records, Open Text has partnered with [Trusted Edge](#) to extend its RM Edge product suite into Open Text offerings. Through that integration, users can be required to classify business records as they are created. Every time a particular user sends or receives an e-mail, a popup window can be initiated that requires the user to select the appropriate classification. Open Text can extend that same level of control into other desktop applications, such as Microsoft Word and Excel--as soon as a user attempts to save a document, he or she is prompted to classify it appropriately. For litigation support, Open Text has partnered with specialist [TCDI](#) so that when business records become evidence, the technology is in place to ensure everything goes smoothly in the server room and the courtroom.

The TCDI litigation support application has seamless access to all content stored within the Open Text records management system, meaning that duplicate copies of content do not need to be created and exported into the litigation support system. On the storage back end, Open Text integrates with multiple storage vendors, including Network Appliance, EMC, Hitachi Data Systems, StorageTek and Hewlett Packard.

[Orchestria](#) helps organizations comply with regulations and protect intellectual property. Its customers include some of the world's largest and most sophisticated corporations, including Goldman Sachs, Bear Stearns and Lehman Brothers.

Orchestria manages threats across all communication channels: e-mail, instant messaging, BlackBerry type devices, Webmail and blogs. Additionally, Orchestria's technology is embedded in Bloomberg Professional, Instant Bloomberg and leading archive providers. Its Active Policy Management approach detects policy violations in e-mail and Web activity before the message is sent or Web transaction is completed. Through Real-time Prevention and Intelligent Review, Orchestria defines policies, detects violations and initiates the appropriate action. That

approach prevents inappropriate activity and deters repeat offenses while enabling compliance personnel to effectively target their review activity, the company says.

Orchestria's Smart Tagging optimizes archive storage by categorizing messages as they enter the archive. It selects and stores only essential messages and makes them easily retrievable.

Stellent's COO Dan Ryan, states, "Our focus is on ECM and records management. In RM, we have one architecture for managing physical and electronic records." Newly released Universal Records Manager (URM) has enhanced capabilities and manages e-mails declared as records in the repository. For EMM, Stellent relies on a variety of strategic partners. Stellent provides a records management agent that is different, depending on the partner. The company partners with Orchestria to provide e-mail policy management. "We particularly like their policy management capabilities," says Ryan.

Symantec gained its EMM and storage management capabilities by acquiring Veritas, which had acquired KVS prior to that, primarily for its Enterprise Vault product and customer base. VERITAS Enterprise Vault software from Symantec provides an archiving framework to enable the discovery of content held within e-mail, file system and collaborative environments, while reducing storage costs and simplifying management, the company says. Enterprise Vault manages content via automated, policy-controlled archiving to online stores for active retention and seamless retrieval of information. The built-in search and discovery capabilities of Enterprise Vault are complemented by specialized client applications for corporate governance, risk management and legal protection.

VERITAS Enterprise Vault 6.0 builds on its proven ability as a centralized archiving framework, according to Symantec, with support to archive additional data types and new features including the filtering of incoming messages for intelligent archiving and categorizing the archived data for enhanced retention and retrieval. For back-end storage, Enterprise Vault integrates with VERITAS NetBackup and other major data protection software. New features in VERITAS Enterprise Vault 6.0 include: support for additional sources of archived content; automated discovery, management and migration of PST files; intelligent archiving through filtering and categorization; and support for additional archiving hardware platforms.

Waterford Technologies reports more than 400 customers, including some large banks, manufacturing companies, local governments and even professional sports teams. Waterford launched MailMeter Storage Management last year. The product began as e-mail management and analysis software over five years ago. MailMeter products are architected to perform fast, and the company reports that its drill down report capability is a key competitive advantage. MailMeter goes beyond current needs--such as storage management, compliance and e-discovery--to find business intelligence, the company says. "We know that more and more companies will realize that the knowledge locked up within e-mail content and around e-mail transactions and behavior is the mother lode of intelligence that can be harnessed for making huge improvements in business operations, competitiveness and profitability," says Anthony Sanchez, VP of marketing.

The **Zantaz** E-mail Archiving Solution (EAS) family of products focuses primarily on storage management, while ensuring the long-term retention and instant retrieval of e-mail and files in the event of a regulatory investigation or discovery request. The ZANTAZ EAS product family includes EAS for Exchange, EAS for Notes, EAS Supervisor and Pre-Review enable (supervision and review of electronic communications, such as e-mail and IM, in accordance with industry regulations); EAS Storage Manager for automatic, policy-driven archive management; and EAS Search for high-performance searching and retrieval of electronic files.

Reported benefits include: elimination of PST headaches and minimum of e-mail and file system downtime; significantly lower IT overhead (by offloading e-mail and files to more cost-effective storage); reduced time and labor required to perform administrative tasks, such as backup and recovery; increased user productivity by eliminating mailbox quotas and improving user access to knowledge assets; improved file system infrastructure; and instant and transparent retrieval of e-mail and files.

[ZipLip](#) has approximately 250 enterprise customers, including Morgan Keegan, Bank of New York, Stephens, Walgreens and Pacific Life. In response to market demands, ZipLip believes it is able to make changes more quickly.

"ZipLip prides itself on owning every single line of code in our software, so whenever a new trend in customer demands emerges, or a need for new features driven by regulations is required, we are able to very swiftly and efficiently make changes and improvements to the system." says ZipLip CEO Kon Leong. "We were already ahead of the curve with pre-review, attorney-client privilege features and auto-categorization and pre-tagging, so we've been fortunate in that we haven't had to play catch-up in this space."

ZipLip was designed from the ground up to be 100% server-side Java, and based on Grid architecture. Its technical philosophy has always been one system, one rules engine, one repository--which has made it easier to add features and functionality to the system. ZipLip offers one of the few archival solutions that stores all data in a non-proprietary format, which means that clients will always have access to archived data even if they are no longer using ZipLip's software.

Global market competition

When you think of software, generally the dominant companies are US-based: [Microsoft](#), [IBM](#), [Oracle](#) and other heavyweights. Overall, that is the advantage the United States has traditionally had, owning more than 80 percent of the software marketplace. But the e-mail archiving and management marketplace has competitors from all over the globe.

Canada is home base for [Incite Software](#), [Activis Technologies](#) and [Fortiva](#). The United Kingdom is headquarters for [C2C Systems](#) and [CC Data](#). [New Zealand](#) is home for an IBM Premier Business Partner, and [AfterMail](#), which was purchased in January by U.S.-based [Quest Software](#).

Expect more acquisitions and alliances in this dynamic marketplace as competitors seek to gain a technology or marketshare advantage.

The 800-pound gorilla has arrived

Many measure the maturity of a marketplace by the entry of [Microsoft](#). Because Microsoft doesn't enter any market until it is a market of millions of users, often its entry is a harbinger of a mature market. Well, folks, Bill Gates arrived at the doorstep of the e-mail management marketplace by completing the acquisition of [FrontBridge](#) in August. With the close of that purchase, Microsoft began the process of integrating FrontBridge into the Exchange Server Group.

Marketing what it terms "total message management," FrontBridge Technologies offers managed messaging services for enforcing e-mail compliance with encryption and archiving tools, provides e-mail availability through a Web-based backup and improves protection of employee inboxes from viruses and spam. Its line of services includes message archiving, spam and virus filtering, disaster recovery and e-mail encryption.

FrontBridge supports multiple e-mail platforms such as Microsoft Exchange and other SMTP-compliant servers, as well as [IBM](#) Lotus Domino for filtering and e-mail encryption. Those managed services are hosted and require no upfront capital investment--another departure for Microsoft. FrontBridge claims to manage the only globally load-balanced network to demonstrate 100 percent historic uptime. Its line of perimeter-based services includes e-mail and instant message archiving for compliance, content and policy enforcement, spam and virus protection, disaster recovery, e-mail encryption and e-mail continuity.

Watch for a real shootout now, while smaller firms race to garner marketshare and preen themselves for possible acquisition.

