



**SHERPA**  
SOFTWARE

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***Archive Attender®***

*Version 3.0*

## **White Paper**

**Sherpa Software Partners**

[www.sherpasoftware.com](http://www.sherpasoftware.com)

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## ***Introduction***

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The explosive growth of corporate email usage has been well documented. This translates to an increasing challenge for administrators who are trying to keep the email server running efficiently. Backups are also a problem, as an inflated mail database leads to increasingly longer times to capture the data. A common remedy is to restrict user storage by enforcing mailbox quota limits. However, this generally leads to the proliferation of PST files, a typically difficult to manage and decentralized storage system. Current trends seem to further deepen the problems for Exchange administrators.

Sherpa Software offers a solution in Archive Attender®, an administrator-driven utility that can be used to quickly, and with minimum effort, archive messages and attachments from Microsoft Exchange Servers and network-accessible PST files to a separate storage device. Archive Attender extends the capabilities of Sherpa Software's current suite of Attender Utilities for Exchange, specializing in content management, policy enforcement and discovery within Exchange Servers and PST files.

With its easy to use policy-based architecture, Archive Attender provides administrators with the ability to archive from mailboxes and PST files, based on sender, age, date, size, subject, and users, to a network-accessible storage device. Administrators, when archiving messages, have the option of replacing the original message with a stub, which contains a link for the user to quickly access the archived message. Also, users' ability to search and recover their archived messages from within Outlook can be controlled using configuration settings available within the administrator console of the application.

The data removed from mailboxes and PST files are stored as zipped .msg files in any network-accessible storage device and the content of the messages and included attachments may be indexed to facilitate quick search and retrieval of the archived data.

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## **Benefits**

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### ***Reduce Installation and Deployment Time***

Archive Attender offers a simplified architecture that, unlike many products, can be installed and up and running in less than fifteen minutes. This efficiency is mainly contributed to the product's limited reliance on Microsoft components and its ability to automatically monitor and configure settings within the operating system that previously required manual intervention to resolve. This, coupled with the fact that there are no additional database or hardware requirements, allows Archive Attender to operate at maximum efficiency and streamline the entire installation process.

### ***Recover Space on the Exchange Server***

With the rapid growth of electronic mail coupled with users' habit of using mailboxes as personal file cabinets, organizations are left dealing with increasingly large email servers and associated problems such as, the need for additional hardware and delays with backups. Using Archive Attender®, administrators can control the size of the email servers by moving messages/attachments to external, less-expensive storage locations.

### ***Comply With Legal Obligations and Government Regulations***

Secure and protect corporate knowledge by archiving important email data. With Archive Attender, administrators have the ability to locate and retrieve critical documents/attachments and move them to a safe and secure location. All message and attachment contents stored in the archive location can be indexed and searched quickly and efficiently.

If Exchange journaling is enabled, Archive Attender can be configured to move all or a subset of messages from the journal mailbox. This provides organizations that have requirements to adhere to corporate, regulatory or legislative compliance policies, a mechanism to ensure that an unadulterated copy of each incoming and outgoing message is captured and stored. These messages may also be indexed and can be searched and recovered using the Archive Attender administrator console.

### ***Easily Provide Users Access to Archives with no Client Installation***

One of the key features of Archive Attender is the ability for the administrator to control users' access to their archives and to provide this access without installing any components on the users' computers. When archiving messages, administrators can select the option to leave a stub of the message in its original folder location. This stub message contains a link that the user may click on to view a copy of the originally archived message, within an Outlook message window.

Administrators may also authorize the creation of a folder within the user's mailbox called 'Archive Search' which can provide the user with a web interface in Outlook, to search for and view messages archived and indexed, from within their own mailbox.

### ***Search all Emails***

Using Archive Attender, administrators have the option of indexing all or selected messages and attachments before they are archived. This ensures quick, efficient and comprehensive searching of all content within the subject and body of emails and all attachments moved from Exchange mailboxes and PST files and stored in the archive.

### ***Eliminate PST Files***

Archive Attender can move all content from network-based PST files into the archives while giving users of those PST files access to the archived messages. When archiving out of PST files, the administrator has a choice of leaving a stub of the original message either in the PST file or in a newly created folder within the user's Exchange mailbox.

When restoring messages archived out of PST files, messages are returned to the user's Exchange mailbox. Unless stubs are created in the PST files, and since all required messages from the PST files are now stored in the archives, the use of those PST files and creation of new ones should no longer be necessary.

### ***No Installation Required on the Exchange Server***

Archive Attender consists of three components; an application console, a Windows service and an Internet Information Server (IIS) web application. None of these components need to be installed on the Exchange Server, freeing the Exchange Server from hosting and executing additional processes. If using Outlook Web Access (OWA) and the archived messages are to be accessible to OWA users, the IIS website portion of the Archive Attender application must be installed on the same server that provides external access to the OWA website.

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## Product Overview

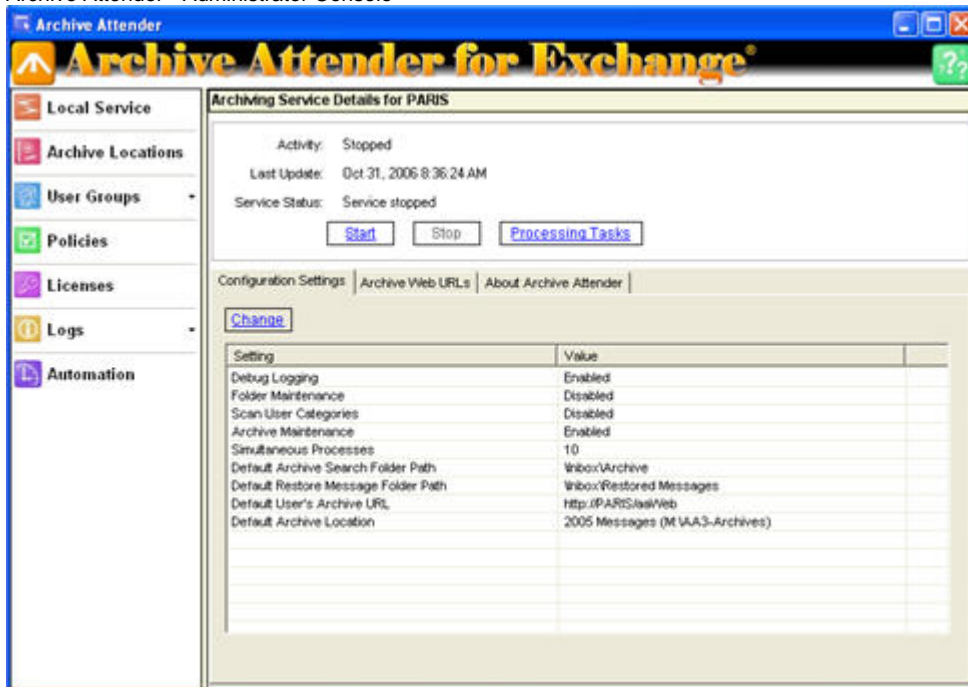
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Archive Attender® is designed as an administrator tool to help organizations manage their email storage. It requires no additional hardware or purchase of any additional software, which makes deployment simple and requires no client installation for users to access their archived messages.

### Product Architecture

Archive Attender contains three major components: an application console serving as the administrator's user interface to setup, configure and manage the processing of the product, a Windows NT service which performs all the activities tasked by the administrator and an Internet Information Server (IIS) web application providing users with access to their archived messages through Outlook and Outlook Web Access.

Archive Attender - Administrator Console



Archive Attender uses no databases; all necessary configuration details are maintained in XML files and in the registry of the local computer. Besides Internet Information Server and the dot net frameworks, all other required components are installed by the application.

### Managing Users in Archive Attender

Users, whose data need to be archived, can be added into the Archive Attender configuration by either querying Active Directory or by having Archive Attender log into the Global Address List (GAL) and query the Exchange Server. This process of adding users may also be scheduled so that Archive Attender can periodically re-query and automatically add new users that have been added to the specified Active Directory path or new mailboxes that have been added to the targeted Exchange Server.

Once users have been added to Archive Attender, there are a number of options that can be configured by the administrator; options such as the ability to search the archives, the ability to archive, restore and delete messages, customize the display of the archives and the assignment of policies to be enforced on the user emails.

### Archive Attender Policies

Archive Attender employs an easy to use architecture to give an administrator the ability to mine through users' mailboxes and archive messages that meet the organization's retention policy requirements. Policies can be defined to query Exchange Servers to capture the messages to be archived based on message conditions such as age, date, size, sender, keywords in the subject and user mailbox quota settings. This criteria set could be

expanded to include additional options such as keywords in the message body, attachment names and types, mailbox sizes, etc., by using Archive Attender in conjunction with Mail Attender for Exchange. Archive Attender policies also include options to target specific types of content from within the mailboxes and also to restrict the mining to a limited set of folders rather than looking through all folders within the mailbox.

Once a policy is created, it can be assigned to the users on whom the policy must be enforced. Policies can be processed either manually or by enabling the policy schedule option to automate its execution.

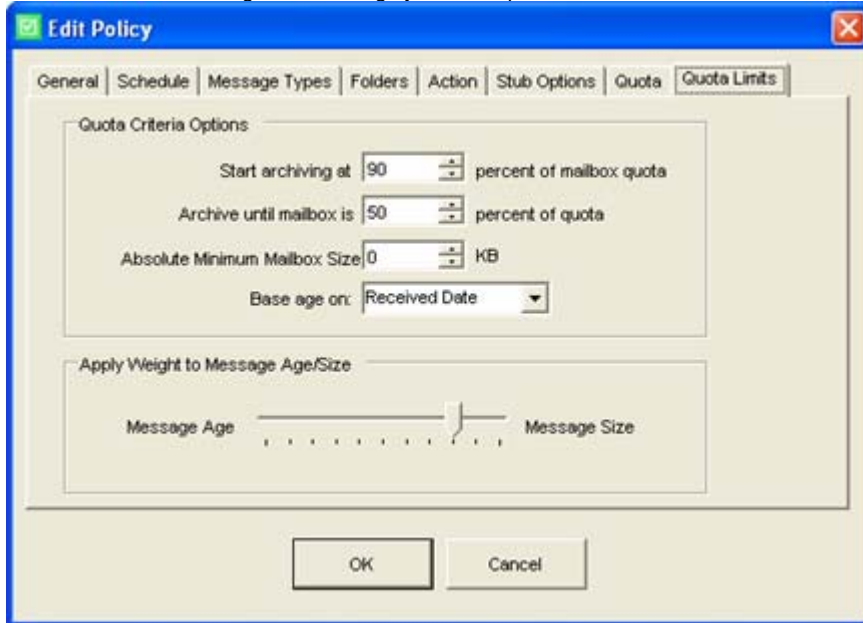
Archive Attender – New Policy



### ***Archiving by Mailbox Quotas***

As mentioned in the previous section, Archive Attender offers the ability to archive messages based on a mailbox's quota settings. This feature can be setup to use one of the four Exchange quota settings or to define a specific mailbox size within the policy that would be used to evaluate the user's mailbox size.

The implementation of the archiving process based on quota targets mailboxes that are at a given high-mark percentage of the mailbox's allowed quota (say 90% for instance) and archive messages until the mailbox reaches an optimum percentage of the mailbox's quota (say 50% for example). The administrator must also define the property of the messages that must be archived to bring the user's mailbox to the optimum level; the choices are the size and/or age of the message. A weighted scale, based on the size and age selection, determines the messages that will be archived. The policy also includes a few fail-safe options to prevent the archiving of very small and/or very recently received messages.



### ***Allowing Users to Archive Messages***

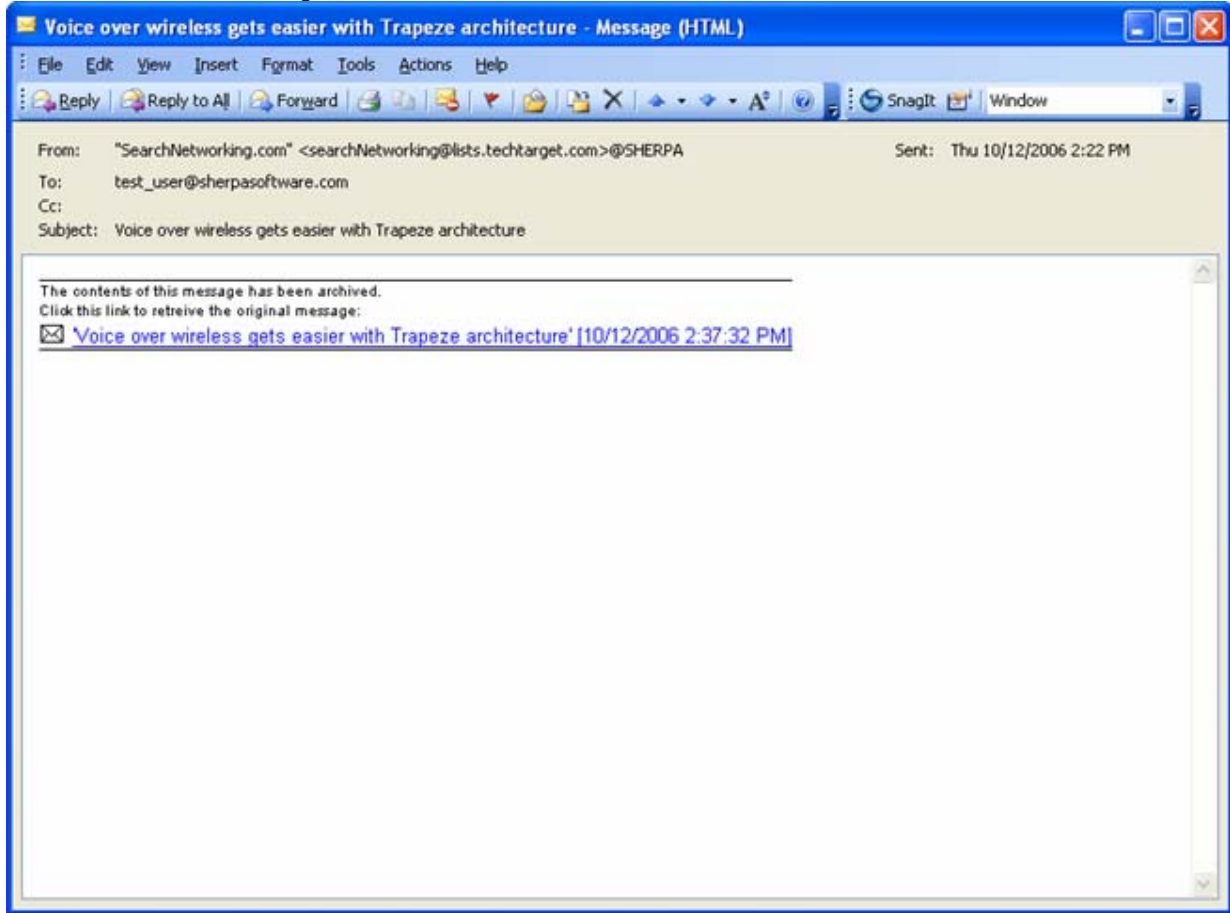
In addition to enforcing policies to archive messages out of a user's mailbox, Archive Attender includes the ability for an administrator to allow a user to archive his or her own messages out of the mailbox. This is accomplished using Outlook categories with a custom category called *\*Archive Message*. Users may select all the messages that they would like archived and assign the *\*Archive Message* category. Archive Attender periodically scans mailboxes of users that are authorized to archive messages and removes all messages categorized as *\*Archive Message*, replacing them with a stub message. The process of scanning mailboxes, looking for messages marked to be archived, is initiated as a periodic maintenance task by the Archive Attender service. The administrator can configure the frequency of this process.

### ***User Access to Archives***

One of the hallmark features of Archive Attender is its ability to provide a user access to all messages archived out of his or her mailbox through Outlook and Outlook Web Access (OWA), without having to install any components on the user's local computer. There are two methods of access to the archive that can be provided to the users, both of which are controlled by the administrator.

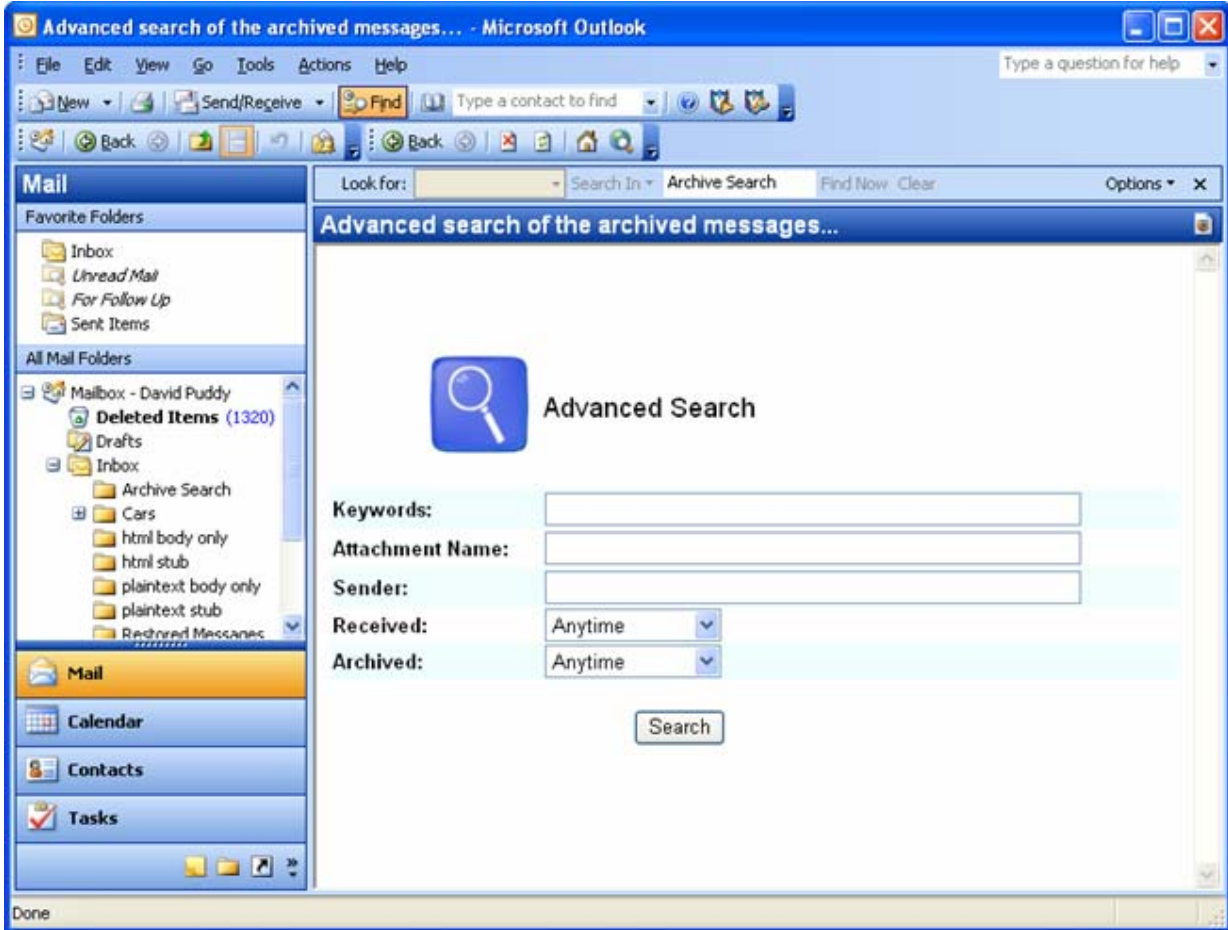
The first is to define a policy to retain stubs when messages are archived out of the user's mailbox. The policy configuration permits the configuration of the action taken in the user's mailbox after a message has been successfully archived. This includes one of three options: leave a copy of the message in the mailbox, remove the message from the mailbox or replace the message in the mailbox with a stub of the original. Choosing the option to leave a stub replaces the archived message in the user's mailbox with a condensed version of it, optionally including an HTTP-based link. The user can click on this link to quickly retrieve and view the original message in an Outlook message window. Viewing the message from the archive does not in any way affect the stub message in the mailbox or the original message in the archive.

Archive Attender – Stub message in Outlook



The other method of providing a user access to his or her archives is by enabling the display of the search interface within the user's Outlook client. This must be done through the administrator console of Archive Attender. Enabling this option generates a folder in the user's mailbox, which displays a web-based interface. Provided the user has been given the appropriate privileges through the administrator console, he or she using this interface can search, view, restore and delete messages archived out of his or her mailbox.

Archive Attender – User interface in Outlook to search archives



Both of the user methods of accessing archived messages described above are also available through Outlook Web Access.

### ***Importing from PST Files***

Archive Attender includes a separate PST importing component that can be used to import all or selected messages from PST files into the user's archive, eliminating the need to retain the PST files. This functionality is for network-based PST files and relies on the administrator associating PST files, discovered by the PST import utility, with users that have been configured in Archive Attender. This mapping of PST files to Archive Attender users is used to determine the archives to import the messages from the PST files into.

The configuration of the import process also includes an option to provide users with the stub of the message being imported into the archive. This stub message can be generated in the PST file or in the mailbox of the user associated with the PST file. If the administrator chooses to create the stub in the user's mailbox, a separate folder is created at the root of the user's mailbox and the stub is generated in the same folder path as the original message in the PST file. Using this option should eliminate the need for the user to go back to the PST file.

### ***Searching the Archives***

The archive search interface, built into the Archive Attender console, gives the administrator the ability to search all indexed messages stored in the archives. The option to index messages can be enabled if searching the archives is required by the administrator and/or users. If not, the archived messages do not need to be indexed. The user's ability to access messages using stubs does not rely on the index and would continue to function even if an index is not generated.

For messages that have been indexed, the administrator has the ability to query them based on keywords contained within the message header, body and content of attachments as well as by sender, recipient, received and archived dates and several other criteria. The results of the search could be opened, copied to a mailbox or copied to a PST file.

As described earlier, users can also be given the ability to search indexed messages that are archived out of their mailboxes using a web interface displayed in Outlook.

Archive Attender – Search Archives from administrator console

**Search Archives**

**Text Criteria**

Keywords:

Sender:

Recipient:

Attachment Name:

**Date Criteria**

Received Date:  Sunday, January 01, 2006 - Friday, November 10, 2006

Archived Date:  Sunday, January 01, 2006 - Friday, November 10, 2006

Modified Date:  Sunday, January 01, 2006 - Friday, November 10, 2006

**Limit Search to Specific Users**

Search all users

Add User Remove Clear

User
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**Limit Search to Specific Archives**

Search all archive locations

Add Archive Remove Clear

Archive Locations
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Search Cancel

### ***Archive Attender® Logging***

Archive Attender also includes extensive logging capabilities. All activities, performed by the Archive Attender service and the Archive Attender console, are logged daily in an HTML format. Detail information of all tasks processed by Archive Attender is logged in a text format and can be used to review the activities performed. Debug logging may also be enabled to capture more detailed information about the processes completed.

### ***Product Licensing***

The evaluation version of Archive Attender, limited to the processing of ten mailboxes, may be downloaded for a trial period of forty-five days. This version includes all the capabilities of the full, licensed version.

In order to use the full version of the product, the evaluation installation of Archive Attender must be upgraded using the installer for the full version. This version includes an interface to enter and manage license keys provided by Sherpa Software, which will permit the processing of more than the evaluation limit of ten mailboxes.

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## **Common Questions**

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### **Q. Where can I install Archive Attender®?**

- A.** Archive Attender contains three main components: an application console, a Windows NT service and an Internet Information Server (IIS) website. Unless access to archives through Outlook Web Access (OWA) is required, no Archive Attender components need to be installed on the Exchange Server. The product may be installed on any computer in the network with access to the Exchange Server and the archive locations. If OWA is being used to provide external access to emails and users require access to the archives through OWA, the IIS website portion of the Archive Attender application must be installed on the front-end Exchange Server (the one that serves as the external host for OWA).

### **Q. Does Archive Attender use a back-end database?**

- A.** Archive Attender does not use a database for its storage. All necessary configuration information is stored as XML and in the registry and all emails are stored as zipped MSG files, which allows easy retrieval by eliminating any proprietary storage formats.

### **Q. How does Archive Attender access the Exchange Server?**

- A.** Archive Attender uses MAPI (Messaging Application Programming Interface) to connect to Exchange Servers and access the messages contained within them. This requires the installation of Outlook on the computer where the Archive Attender Service is running.

### **Q. Where can I archive the messages and attachments?**

- A.** Archive Attender can move content to any storage device that is accessible using a Universal Naming Convention (UNC) path. That includes SAN devices, NAS devices, file servers, worm drives, DVD drives, etc.

### **Q. Can I search the archived data?**

- A.** Archived data that has been indexed is available to be searched. If an index wasn't created at the time that the message was archived, one could be built at a later time. Anyone with access to the Archive Attender console will have the ability to search the indexed portion of the archives based on keywords within messages and attachments, received date of the message, the message sender and several other criteria. Users will be able to search their own archives using similar criteria.

### **Q. What permissions must the archiving service have?**

- A.** The account used by the archiving service must have full administrative rights to the computer where Archive Attender is installed, full rights to all the mailboxes on the Exchange Server from where data is to be moved and read/write access to the storage locations where data is to be archived. Please be aware that domain administrator accounts are denied rights on the Exchange Server by design. For questions about providing adequate permissions, please refer to Microsoft Knowledgebase articles Q821897 for Microsoft Exchange 2003 and Q262054 for Microsoft Exchange Server 2000.

### **Q. What pieces of Archive Attender should I backup?**

- A.** Please be aware that Archive Attender does not maintain redundancies of the archived data and it is imperative that you maintain regular backups of the archives and configuration details.

The data that must be backed up to facilitate smooth recovery from disasters are the archive locations containing the archived content and the Archive Attender configuration details stored in the Services directory in the Archive Attender installation directory (the default path to this directory is C:\Program Files\Sherpa Software Group\Archive Attender for Exchange\Service).

### **Q. What do I do if the computer running Archive Attender crashes?**

- A.** In order to restore Archive Attender, re-install the application and point it to the location where the archived messages are stored. All the pointers to the data will be regenerated and the archived data will once again be accessible.

To restore the settings, user information, policies and other configuration details, replace the Service folder in the Archive Attender installation directory (default is C:\Program Files\Sherpa Software Group\Archive Attender for Exchange) with one restored from a previous backup.

**Q. In what format are the messages and attachments exported?**

- A. All content archived out of mailboxes and PST files are stored as compressed MSG files. Microsoft Outlook is the default application for files of type MSG.

**Q. Can I archive from multiple Exchange Servers?**

- A. Yes, you can. You may also install multiple copies of the Archive Attender® application to share the processing load. However, each installation functions as an independent entity and would need to be configured and managed individually.

**Q. What versions of Exchange are supported?**

- A. Archive Attender can archive messages from Exchange 5.5, Exchange 2000 and Exchange 2003.

**Q. Can the administrator restore messages from the archive?**

- A. Yes, the administrator can restore messages out of the archive into an Exchange mailbox or into a PST file.

**Q. Does Archive Attender work with Exchange journaling?**

- A. Yes. An Archive Attender policy can be configured to periodically connect to the journal mailbox and move either all or a filtered list of messages into the archive.

**Q. How can users access messages from the archive?**

- A. Archive Attender provides two options for users to access their archived messages, both of which are controlled by the administrator.

The first option requires the administrator to configure the policies that archive messages to leave behind stubs in place of the messages moved into the archive. These stub messages contain a link within the body of the message to access the original message in the archive.

The second method for users to access their archived messages is by being given permission, by the administrator, to search their archives. Enabling this option creates a folder in the user's mailbox, which contains a web interface for the user to search his/her archives.

**Q. Can users archive their own messages?**

- A. Using the Archive Attender console, administrators have the ability to provide users the option to archive their own messages. User initiated archiving is performed using the Categories feature within Outlook. Once configured, users may categorize messages they would like to archive using the custom *\*Archive Message* category. Archive Attender periodically scans mailboxes of authorized users to archive all messages tagged with the custom category.

**Q. What are the system requirements for Archive Attender?**

- A. The console requirements are:

*Windows 2000, XP Professional or 2003*

*Dot Net Framework 1.1*

*Dot Net Framework 2.0*

*Microsoft Internet Information Server 5.0 or higher (can be installed from the Microsoft operating system disk)*

*Microsoft Outlook 2000 or greater or Exchange 5.5 or higher*

*Internet Explorer 5.0 or higher*

*Approx. 10MB - 60MB footprint on installation*

For the users to view their data in Outlook, they must use Outlook 2000 or higher.

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## **Product Details**

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### **Product History**

Sherpa Software has been a market leader in email management software for Lotus Notes and Microsoft Exchange for over six years. Originally created for the Notes platform, Mail Attender® was designed to address deficiencies in existing Notes administrative tools and to empower administrators with additional control over their email environment.

Mail Attender® for Exchange was built to recreate the functionality of Mail Attender® for Notes in Microsoft Exchange. Following the success of Mail Attender for Exchange and in response to a market need that remained largely unfulfilled, Sherpa released PST Attender to manage the untended growth of PST files within organizations. PST Attender for Desktops addressed similar PST file concerns but extended the reach of an administrator to manage PST files located on users' local computers.

Mail Attender® for Exchange Enterprise Edition was released in October 2003, combining the functionality under one console of Sherpa's three Exchange management tools: Mail Attender, PST Attender and PST Attender for Desktops.

Mail Attender® for Exchange Enterprise Edition excels in its ability to enforce corporate email policy, making it easy for administrators to find and eliminate or move messages and attachments based on a number of flexible and configurable criteria from Exchange mailboxes, public folders and/or network and local PST files. But as regulatory requirements began to define the corporate data storage landscape, the need to effectively store email data for extended periods has gone from being a luxury to an absolute necessity.

Archive Attender® is Sherpa Software's response to this need. Building on over twenty years of expertise in developing tools for the Microsoft platform, Archive Attender is a simple yet effective archiving tool designed to allow companies to archive quickly and inexpensively.

### **Releases**

Periodic major releases may be expected two to three times a year, for customers with active maintenance/support agreements. In addition, hot fixes will be created as needed, to resolve issues in the product. Please visit our website at [www.sherpasoftware.com](http://www.sherpasoftware.com) for the latest information regarding upcoming releases of Archive Attender and our other email management products.

### **Supported Versions**

Archive Attender can archive data from Exchange 5.5, Exchange 2000 and Exchange 2003. Users accessing their archived messages can do so using Outlook versions 2000, XP and 2003. Please visit our website ([www.sherpasoftware.com](http://www.sherpasoftware.com)) for information regarding known issues with any specific Microsoft releases of the above mentioned versions and also future service releases of the above products.

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## ***Summary***

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Storage demands for today's corporate emails are enormous. Archive Attender® is a simple, easy to use, effective and inexpensive tool to help email administrators address their storage concerns. Future versions of Archive Attender will continue to include additional features to meet the ever-changing demands of the email storage landscape.

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## **Contact Information**

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For additional information on Archive Attender®, please visit our website: [www.sherpasoftware.com](http://www.sherpasoftware.com) or call us at 1-800-255-5155 or 1-412-206-0005.