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***Archive Attender™***  
*Version 1.1*

## **White Paper**

**Sherpa Software Group**  
[www.sherpasoftware.com](http://www.sherpasoftware.com)

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## ***Introduction***

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Archive Attender™ is an administrator-driven utility that can be used to quickly, and with minimal 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 that specialize in content management and discovery within Exchange Servers and PST files.

With its easy to use rule-based architecture, Archive Attender provides administrators with the ability to archive messages from users' mailboxes and PST files, based on age and size criteria, to a network-accessible storage device. Additionally, Archive Attender includes functionality that allows users, with the administrators' permission, to search and recover messages from their archives using an automatically generated folder in Microsoft Outlook. In addition, Archive Attender includes an option to integrate with Mail Attender to take advantage of Mail Attender's vast and customizable rule features, such as archiving based upon content.

The data removed from the mailboxes and PST files are stored in a proprietary format with all the content indexed to facilitate quick and easy searches by the administrator and by users.

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## **Benefits**

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### ***Reduce Space on the Exchange Server***

With the rapid growth of electronic mail coupled with users' habits of using mailboxes as personal file cabinets, organizations are left dealing with increasingly large email servers. This over-consumption of space can introduce problems such as the need for additional hardware, performance issues and delays with backups. With Archive Attender™, administrators can control the size of the email servers by moving messages with attachments to external storage locations.

### ***Eliminate PST files***

Imagine this scenario: email storage on Exchange Servers is growing exponentially and users are retaining gigabytes of email data in their mailboxes. In response, an email quota system is implemented, limiting the amount of email storage allowed for each mailbox. Users now begin to download messages to PST files in order to adhere to the quota policy while still retaining access to their old emails. Implementing an archiving solution will resolve the dual issue of restricting the growth of the email server while still giving users access to old emails. But how does one handle all the PST files that have already been created? Archive Attender provides the ability to associate network-accessible PST files with Exchange mailboxes and archive all the messages out of the PST files. Users will be able to view, search and recover their PST file content back into their mailbox thereby eliminating the need for the PST files.

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

Many organizations require information security for both internal and external reasons. Secure and protect corporate knowledge by archiving data. With Archive Attender, administrators have the ability to locate, retrieve and index critical documents/attachments and move them to a safe and secure location to comply with corporate, legal and regulatory requirements.

### ***Easily Provide Users Access to Archives***

One of the major benefits 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. Users authorized to view their archives are provided with a folder in Outlook, automatically created by Archive Attender, through which a web page containing a list of all messages archived from their mailbox and PST files is displayed. In addition, users will be able to search and recover their message, provided administrators include the ability to do so via the Archive Attender configuration screen on the console.

### ***Customize Rules and Actions***

Archive Attender allows administrators to archive based upon age and size, and additionally can be integrated with Mail Attender to allow archiving based upon content. Mail Attender includes hundreds of customizable rules and actions that Archive Attender can leverage through its integration with Mail Attender.

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

Archive Attender consists of two major components: a console and a Windows service. Neither of these components require installation on the Exchange Server, thereby preventing a possible re-boot of the mail server during installation of Archive Attender, and also, freeing the Exchange Server from executing additional processes.

### ***Remote Access to the Console***

Since Archive Attender includes an optional web console, management of the utility can be performed from any computer within the organization's intranet. It is recommended that administrators secure the console website using the security options provided by Internet Information Server (IIS).

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## **Common Questions**

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**Q. Where can I install Archive Attender™?**

- A. Archive Attender contains two main components: a console and a service. The console is a Microsoft Dot Net application that communicates with the service using Microsoft Message Queuing (MSMQ). If users need access to their archived data, a Dot Net website is also installed which generates web page lists of the users' archived messages. Since there are several components required for a proper implementation of Archive Attender, we recommend that it be installed on a separate computer that has access to the Exchange Servers, network PST files and the archive storage locations. If Archive Attender will be archiving from more than five hundred mailboxes, we recommend a low-end server for the Archive Attender console computer.

**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.

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

- A. Administrators can search the archive through the console using keywords, the received date of the messages and the sender of the messages as criteria. Users, if given access to their archives, may also search their archives using the same criteria.

**Q. What permissions must the archiving service have to process rules?**

- A. The account used by the archiving service must have full administrative rights to the Exchange Servers and location of the PST files from where data is to be moved, read/write access to the computer where the Archive Attender console is installed and also read/write access to the storage locations where data is to be archived.

**Q. If the archived data or if the content index is lost, can I still recover all the archived information?**

- A. Since the archived data and the indexes are maintained as files, we recommend you maintain a backup of the data. Archive Attender does not create or maintain any redundancy of the archived information.

**Q. Can Archive Attender archive messages from PST files?**

- A. Archive Attender can archive messages from network-accessible PST files and will restore the messages back to a pre-selected mailbox.

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

- A. As Archive Attender captures a message to be archived, some of the properties of the message such as the subject, received date, etc. are stored separately from the actual content of the message, in a proprietary format. The attachments are single-instanced and all of the content is indexed before being archived. Attachments are stored in their entirety in their native format.

**Q. Are multiple instances of the same messages and/or attachments stored in the archives?**

- A. Only single instances of attachments are stored. However, any change to the content of an attachment is viewed as a different instance of the item and would be archived again. Each message is stored separately.

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

- A. Yes, the archiving service can archive messages out of multiple Exchange Servers provided the account used by the service has administrative rights to all of them.

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

- A. Yes. The administrator can search the entire archive and copy the messages to an existing mailbox or PST file.

**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. For the users that are given this ability, Archive Attender will create a folder named *Archive Now* in their Microsoft Outlook folder list. Messages dragged into this folder will be automatically archived by the archiving service

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

- A. The console requirements are:

*Windows 2000, XP or 2003*

*Dot Net Framework 1.1 (will be installed by Archive Attender)*

*Microsoft Internet Information Server 5.0 or greater, only required if users need access to archives (can be installed from the Microsoft operating system disk)*

*Microsoft Message Queuing (can be installed from the Microsoft operating system disk)*

*Internet Explorer 5.0 or higher*

*Approx. 10MB – 35 MB footprint on installation*

For the users to view their data in Outlook, they must use Outlook 2000, XP or 2003.

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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 more than five 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 then Sherpa's three Exchange management products: 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. But as regulatory requirements began to re-define the corporate email 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**

Version 1.0 of Archive Attender was released in August 2004. Version 1.1, with enhancements that included indexing of all archived content, ability to archive out of PST files and providing users the ability to search their archives, was released in December 2004. Customers with active maintenance/support accounts may expect three to four new, enhanced versions of Archive Attender each year. 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 has been tested to archive data from 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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## **Product Overview**

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Archive Attender™ was designed to help organizations manage their email storage needs. It requires no additional hardware installations, makes deployment simple and requires no client installation for users to access their archived messages.

### **Product Architecture**

Archive Attender contains two main components: a Dot Net application console for the administrator to setup, configure and manage the processing of the product and a Windows service, referred to as the archiving service, that performs the activities tasked by the administrator.

The components communicate with each other by exchanging xml message streams through Microsoft Message Queuing (MSMQ) and by configuration files stored in the application directory. A private queue called *shepaarchiver*, created by the Archive Attender installer, is used as the repository for exchanging messages.

### **Archive Attender Rules**

Archive Attender employs an easy to use rule architecture to query the Exchange Servers and PST files to capture the messages to be archived. In a rule, administrators can define age and/or size criteria (or integrate with Mail Attender to define content and other criteria) when querying for content to archive. Additionally, messages contained in specific mailboxes, PST files or entire Exchange Servers can also be selected.

There are two ways of executing an Archive Attender rule: by scheduling it and by initiating it manually. Schedules may be set in the rule. Once a rule is saved, if it is scheduled, the archiving service starts a timing routine that initiates the processing of the rule at the appropriate time.

One final rule configuration option is the storage location(s) where messages and attachments retrieved by the archiving service, as a result of the criteria specified in the rule, are to be archived. If multiple locations are chosen, administrators may also configure if each location should be filled before archiving to the next one, or if the data should be stored evenly across all the specified locations.

### **User Access to Archives**

In the Management section of the Archive Attender console, administrators can choose specific mailboxes (or entire Exchange Servers) that will have access to its archived data. Selecting this option initiates an archiving service task to create a folder, as a sub-folder of the Inbox, called *View Archives*, whose *Home Page* property is activated with its Universal Resource Locator (URL) set to point to a web page listing all the messages archived from the mailbox. The *Home Page* property of a folder displayed in Microsoft Outlook ensures that the folder is set to display an HTML web page rather than Outlook's default folder view.

Users with the *View Archives* folder can search the archives and also choose to recover specific messages. Messages are recovered to the *Restore* folder, another folder created by the archiving service as a sub-folder of the Inbox.

Another configuration option is to allow users to archive their own messages. Choosing this option will create an *Archive Now* folder, as a sub-folder of the Inbox, in all the specified users' mailboxes. Users can then simply drag messages into this folder, which will then be archived by the archiving service.

Administrators can also configure the method by which recovered messages are to be handled. They can choose between leaving a copy of the message in the archive and removing the message from the archive when users recover archived messages back into their mailboxes.

### **Archive Attender Logging**

Two sets of logs are created and maintained by Archive Attender: a service log and a rule log. The service log can be viewed by clicking the *Archiving Service* option on the console that tracks all of the activities of the Archiving Service. The rule log stores information about each execution of every Archive Attender rule. The rule log can be viewed by selecting a rule and clicking the Log icon on the console.

### ***Product Licensing***

The free evaluation version of Archive Attender™ is available for download from the Sherpa Software website. It is valid for ninety days from the installation date and can be tested against ten mailboxes/PST files.

When the product is purchased from Sherpa Software, a product license key will be provided. This key can be entered into the system on the *License Keys* page of the product console.

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## **Summary**

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Storage demands for today's corporate email are enormous. Archive Attender™ is a simple, easy to use, effective and inexpensive tool to help email administrators address their storage requirements. 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 412-206-0005.