



The Radicati Group, Inc.
www.radicati.com

Email Archiving Solutions

A Radicati Group Webconference

9:30 am, PT
May 26, 2011

The Radicati Group, Inc. Copyright
© May 2011, Reproduction
Prohibited

Speakers & Agenda



The Radicati Group, Inc.
www.radicati.com

Speakers:

- ▶ Jill Hearn, *Principal Product Marketing Manager*, **EMC**
- ▶ Warren Roy, *CEO*, **Global Relay**
- ▶ Nick Mehta, *CEO*, **LiveOffice**
- ▶ Mounil Patel, *Director of Professional Services*, **Mimecast**

Agenda:

- ▶ *Presentations from EMC, GlobalRelay, LiveOffice and Mimecast*
- ▶ *Speaker Panel Discussion (all) – moderated by Sara Radicati*
- ▶ *Audience Q & A session*

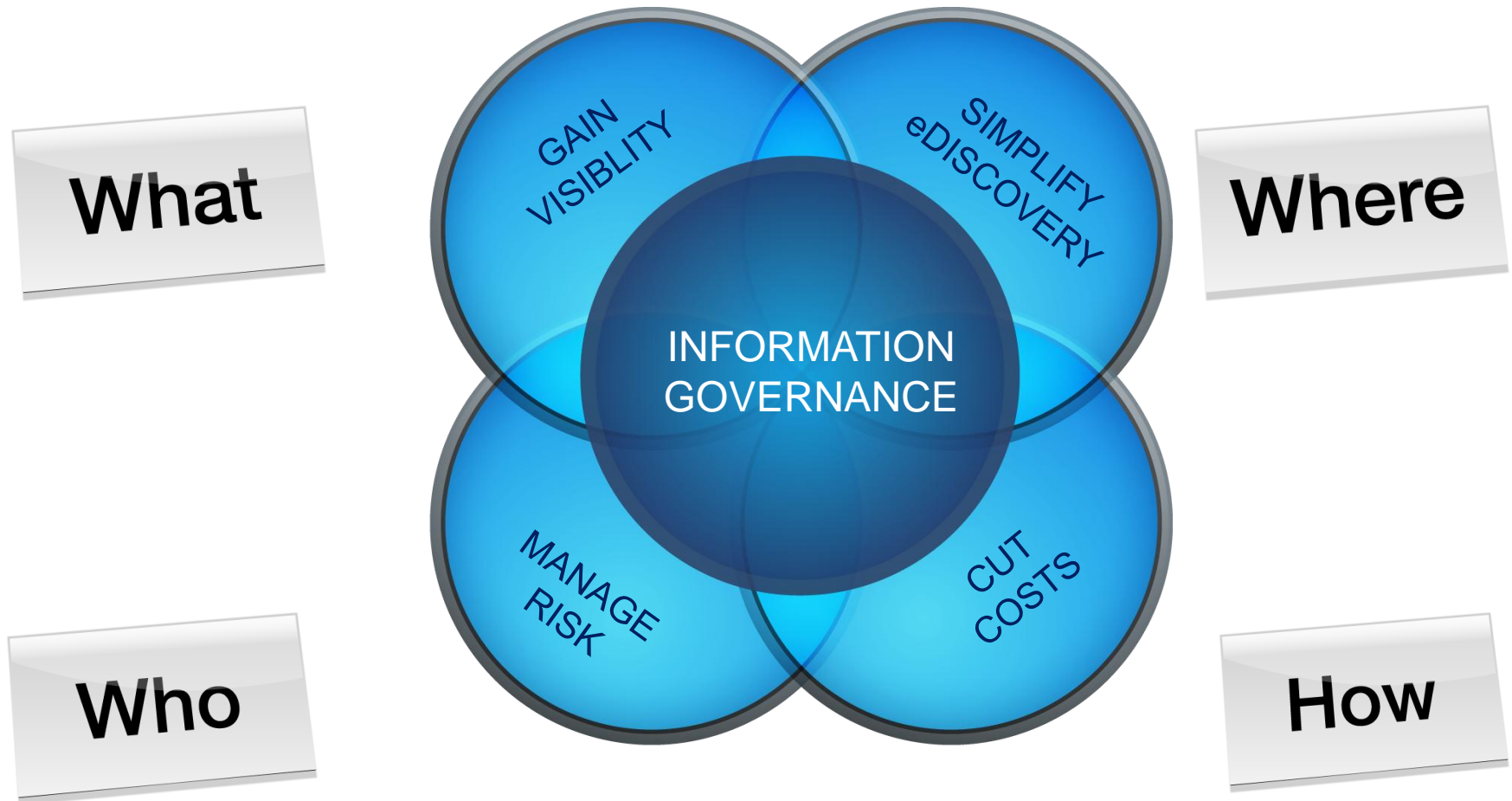


Applying Information Governance to Unstructured Content

Jill Hearn

Product Marketing, EMC SourceOne

Actionable Information Governance



Proactively Manage Mailbox Sizes



Mail Stores

Archive

Shortcut

Delete

Single Instance one copy of each original email message, calendar item, etc.

Tools: Historical Archive, Real time capture, User Directed Archive (UDA)

Example: Archive all email for Accounting Department in Real-time (journal)



Proactively Manage Mailbox Sizes



Mail Stores

Archive

Shortcut

Delete

Leaves a small fraction on mail server; still accessible to users via inbox

Tools: Offline Access, Universal URL, web search tool, Discovery Manager

Example: Content 90 days old



“The sprawling Exchange environment left us facing a huge rise in costs. The answer was to invest in technology to reduce the amount of email data and enjoy more intelligent and effective storage email management”.

- IT Project Manager

EMC²

Proactively Manage Mailbox Sizes

Mail Stores

Archive

Shortcut

Delete

Remove from mail server; user access by searching the archive

Tools: Web search, Discovery Manager

Example: Content 2 years old



“Users can still easily access their old emails. In fact, in many cases they can get them even faster because network performance is so much better”

- Network Security Administrator

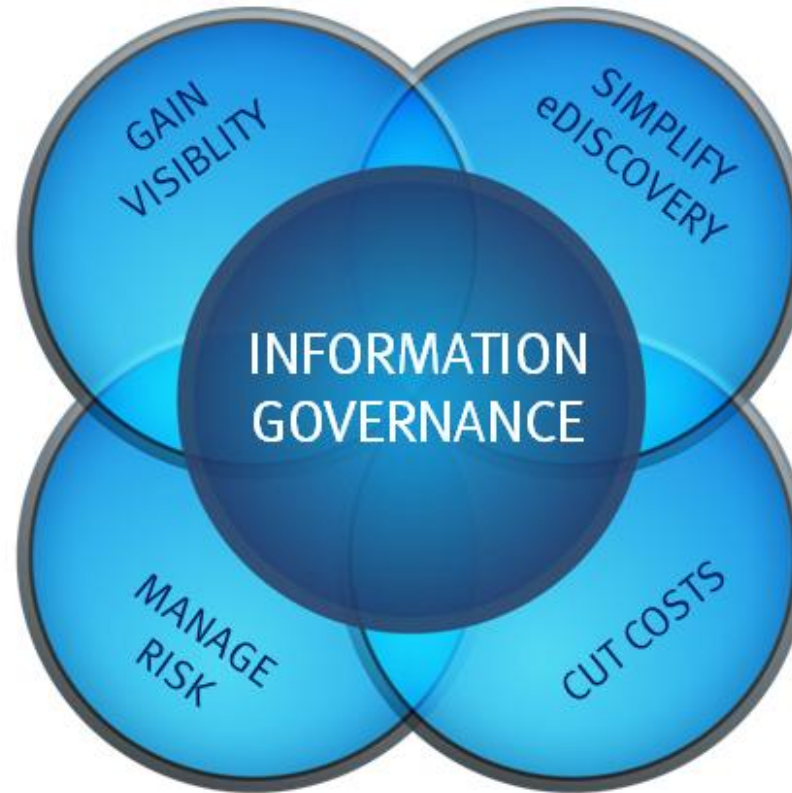
EMC²

SourceOne Email Management Enabling Technologies



EMC²

Making Information Governance Actionable



- SourceOne File Intelligence

- SourceOne eDiscovery – Kazeon
- SourceOne Discovery Manager

- Documentum Retention Policy Services
- Documentum Records Manager

- SourceOne for File Systems
- SourceOne Email Management
- SourceOne for Microsoft SharePoint

EMC² | SourceOne

Modular

- Modular approach
- Apply to unstructured content throughout the organization

Consistent

- Identify risky and obsolete information in-place
- Make sound decisions and policies
- Makes archiving “smarter”

Repeatable

- Repeatable in-house solution for response and readiness
- Reduce review costs up to 90%

Flexible

- Set retention across all content
- Reduce costs by 50% or more

Making Information Governance Actionable



EMC² | SourceOne

Take a Guided Tour at www.emc.com/sourceonacity

EMC²



Global Relay Overview

Message - Archive - Search

Radicati Group Email Archiving Web Conference
May 26, 2011

¹ *Community. Collaboration. Compliance. Control.*
Global Relay Communications Inc. Proprietary & Confidential. Not for distribution.

About Global Relay

- 12 years of delivering Software-as-a-Service (SaaS) in a secure private cloud
- Core competency: Message Archiving, Compliance, & eDiscovery
- Team of 160+ employees; more than 75 developers; strong Legal/Audit team
- 14,000 customers including 22 of 25 largest banks
- Exclusive FINRA compliance resource provider for message archiving
- Strategic network of partnerships worldwide
- Privately held, employee controlled & profitable
- Offices in major financial centers worldwide, providing 24x7x365 support



Global Relay Archive

It's not just about email...



Global Relay Archive securely captures and archives:

- Email
- Instant Messaging
- BlackBerry
- Bloomberg
- Social Media
- Thomson Reuters
- Pivot
- YellowJacket

Global Relay Services

Archiving

- **Global Relay Archive** – Electronic message archiving solution, purpose-built for compliance, business continuity & mail management.
- Built-in compliance, supervisory, audit & eDiscovery features. Archive email and 20+ additional messaging types.

Search

- **Global Relay Search** – Search archived messages anytime, anywhere – via web, BlackBerry & iPhone .

Messaging

- Communication & collaboration tools for your firm – including **Global Relay Message (secure instant email messaging)**, and email services.

Global Relay Archive – Designed for Compliance

Assisting firms in meeting FINRA, SEC and other Compliance Rules for Recordkeeping, Supervision, Audit Readiness & eDiscovery

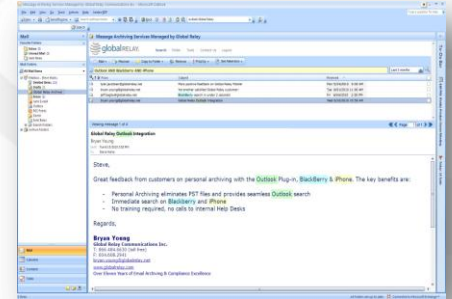
- **Recordkeeping**
 - Automatic capture & archiving of electronic business communications
 - Long-term tamperproof WORM storage & message management
 - Business continuity & disaster recovery functionality enabled
- **Supervision**
 - Unified search, review & retrieval across all message types and users
 - On-demand & scheduled reporting
 - Real-time filtering for keyword or phrase violations
 - Random Sampling of each rep's messages customized by percentage & user
- **Audit, eDiscovery & Litigation Readiness**
 - Full audit trails on every message for all user actions – time/date stamped
 - Easy data export for audits & eDiscovery via SFTP/HTTPS
 - Support for legal holds, case management & online auditor access
 - Global Relay can assist during audits, exams, litigation, eDiscovery



Leveraging Your Archive: Beyond Compliance

Company-wide Archive Access

- **Long-term Storage & Message Management**
 - Retrieving historical & deleted messages
 - Reduce IT burden & mail management costs
- **Business Continuity & Disaster Recovery**
 - End-user access to messaging in the event mail servers are down
- **Employee convenience & productivity**
 - Employee access to all archived message types
 - Outlook plug-in with archive access
 - Smartphone apps to Search, View, Recover, Reply, Reply All & Forward



Microsoft Outlook Plug-in



BlackBerry & iPhone

Due Diligence

Know Your Vendor

- **Global Relay independent third-party validation**
 - SAS 70 Type II (Environmental Controls)
 - KPMG Report on Global Relay Security, Business & Operational Controls
 - Physical Security
 - Change Management (Patches, Releases, Upgrades)
 - Network Security & Availability
 - Message Flow & Processing
 - Data Import, Extraction & Destruction
 - Security Policies & Standards
 - Personnel Policies & Procedures (e.g. background checks, references)

Additional Resources For Further Information

- **Compliance Solutions Guidebook Series**
 - Available for: Broker-Dealers, Investment Advisers, Hedge Funds, Public Companies, Health Care, Enterprise
 - www.globalrelay.com
- **KPMG Report on Global Relay Security, Business & Operational Controls**
 - Contact Global Relay

Global Relay's Offices Worldwide	
New York	866.484.6630
Vancouver	604.484.6630
London	+44.203.139.9064
Singapore	+65.3158.1301
	www.globalrelay.com

Warren Roy

CEO & Founder

warren.roy@globalrelay.net

Shannon Rogers

President and General Counsel

shannon.rogers@globalrelay.net





Thank You!

www.globalrelay.com

866.484.6630

Community. Collaboration. Compliance. Control.
Global Relay Communications Inc. Proprietary & Confidential. Not for distribution.



Nick Mehta, CEO

LiveOffice

May 2011

Our Core Principles

- Meet **enterprise** requirements...
 - Mailbox Management
 - E-Discovery
 - Compliance
- ...with less **cost** and **complexity**...
 - No hardware, no software, no plug-ins
 - Automated setup, management, upgrades
 - Predictable, affordable unlimited storage pricing
- ...and **unique** cloud value...
 - Email Continuity
 - Large-scale indexing/search
 - Cloud-to-cloud integration (Salesforce.com, Microsoft BPOS, etc.)

Key Differentiators



Mailbox Management: Strong Outlook integration (plus OWA, Notes and mobile) without plug-ins or stubs helps eliminate PSTs while giving end users unlimited access.



E-Discovery: Advanced e-discovery with built-in review, dynamic legal holds and multiple export options (e.g., EDRM XML) for downstream review.



Enterprise Retention: Automatic and tag-based retention with automated expiration.



Fast Search: Sub-second search speed across personal and complex discovery searches makes the archive more usable and efficient.



Security: Two-factor authentication, unique encryption keys, password hashing, detailed auditing and SAML 2.0 single sign-on meets enterprise security requirements.



Cloud-to-Cloud Integration: New integration with Salesforce.com and Microsoft BPOS/Office 365 demonstrates the power of an archive beyond traditional use cases.

End User



IT



Legal



Compliance



Security



Sales



HR



iPhone

BlackBerry Windows phone

Salesforce



SuccessFactors
People Performance

Our Vision



On-Premise Information

Microsoft
Exchange



Novell
GroupWise

Mobile Information

BlackBerry

iPhone

Windows
phone

Cloud Information

Microsoft
Office 365

Google
Apps

facebook

LinkedIn

twitter



Other

REUTERS

Bloomberg

Microsoft Office
SharePoint

Y! MESSENGER



Complete Cloud Archive

One platform to address three core drivers for archiving



Target: IT, End Users

- Unlimited Mailbox
- Zero client footprint
- Outlook/OWA/Notes/BES
- Search, tag, reply, restore
- PST/NSF folder import
- Built-In Email Continuity



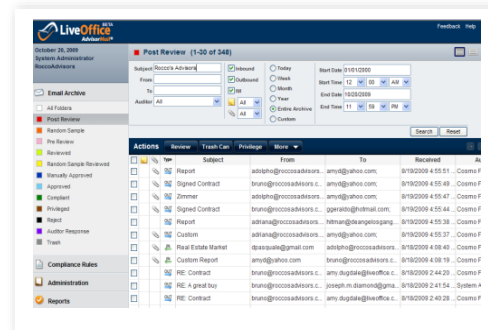
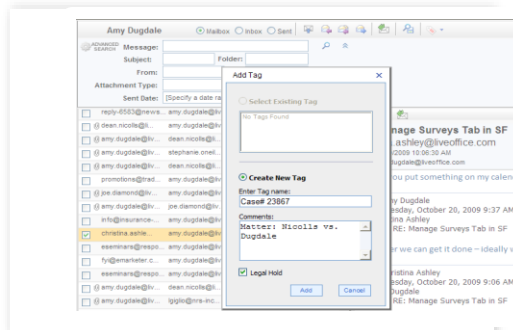
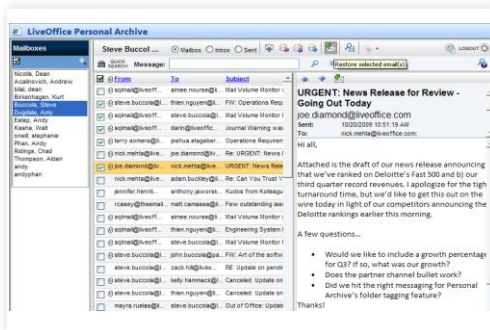
Target: Legal/HR

- Self-Service Discovery
- Roles-based access
- Boolean, fuzzy, full text
- Highlighting and review
- Tagging, holds, export
- Audit trail
- Optional: SharePoint



Target: Compliance

- SEC/FINRA Compliance
- Email, IM, Bloomberg
- WORM storage
- Supervision workflow
- Online audit download
- End-to-end audit services
- Optional: Social Media



Welcome to Mimecast

MOUNIL PATEL



Mimecast's Mission

- We aim to make business email easy
- We reduce risk, lower costs and improve productivity
- We augment Microsoft Exchange and Office 365, and facilitate pain-free migration



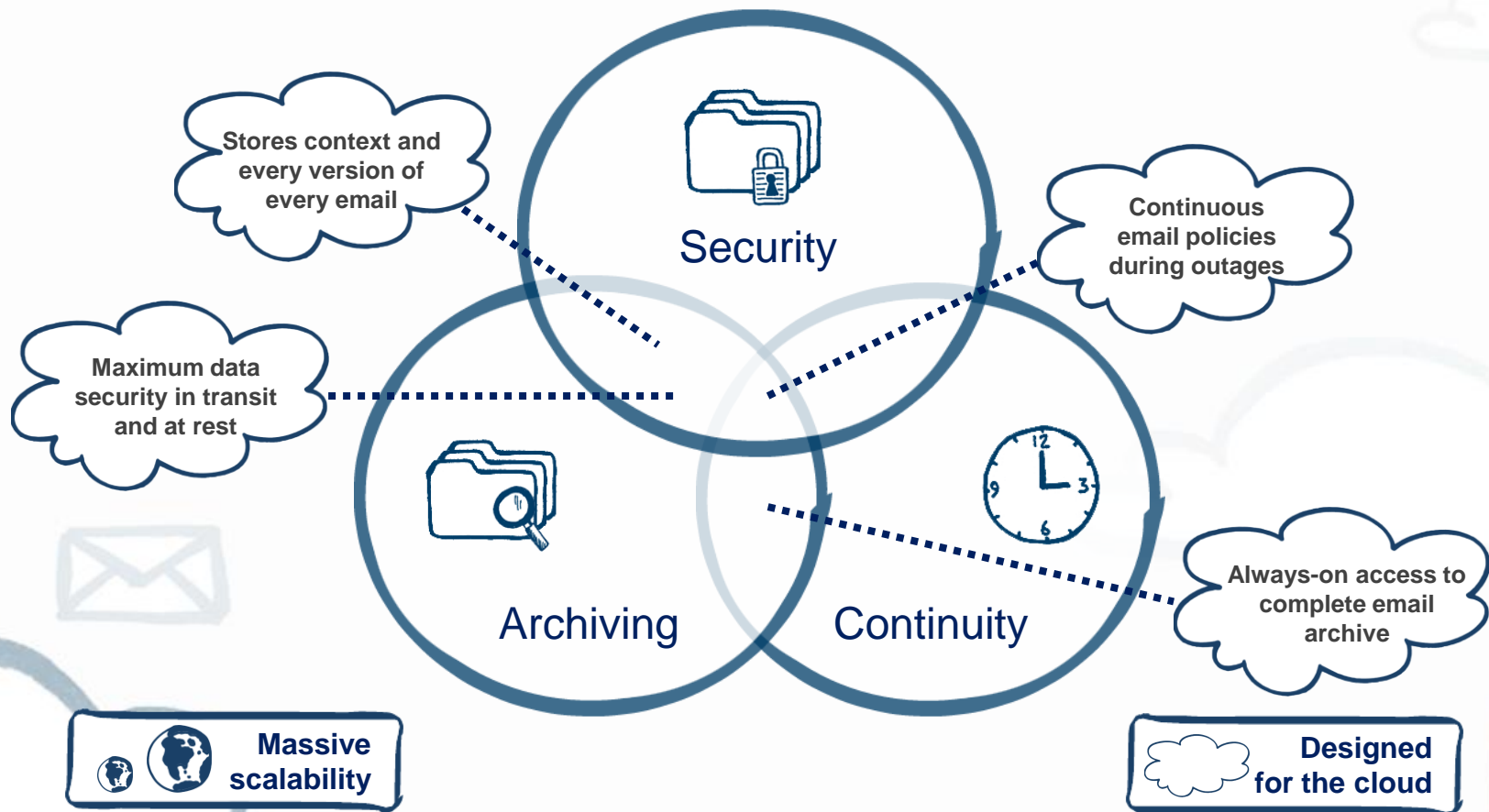
Four Pillars of Email Archiving

- Mailbox and server management
- Compliance with regulatory mandates
- Support for eDiscovery processes
- Rich knowledge management features

Selecting The Right Solution

- Search capabilities & message availability
- Ergonomics and design
- Scalability & accessibility
- Simple management
- Archive security, encryption & data Integrity
- Cost effectiveness

Unified Email Management





Mimecast Email Archiving

- Near real-time search and retrieval
- No additional on-premise hardware required
- Built in high availability
- Tight integration with Microsoft Outlook
- Strong security features
- Comprehensive support for eDiscovery
- Unified message handling
- Cost effective long-term archiving

“Mimecast’s integration with Exchange is the best I’ve seen, providing our users with a familiar interface...“Our users don’t have to take any proactive backup measures; it’s automatic. And if we need to retrieve something, searches are practically instant – a major upgrade from our previous process, which required us to search through PST files. Mimecast reduced the time required to recover a message by tenfold or more.”

Carol Beggs
VP, Technology Sonesta Collection

Your Speaker Panel



The Radicati Group, Inc.
www.radicati.com

Sara Radicati

President and CEO, The Radicati Group

Jill Hearn

Principal Product Marketing Manager, EMC

Warren Roy

CEO, Global Relay

Nick Mehta

CEO, LiveOffice

Mounil Patel

Director of Professional Services, Mimecast

Thank You!



The Radicati Group, Inc.
www.radicati.com

New Reports just published by The Radicati Group:

- ▶ Email Statistics Report, 2011–2015
- ▶ Enterprise Social Networking – Market Quadrant, 2011
- ▶ IBM Lotus Notes and Domino Market Analysis, 2011–2015
- ▶ Corporate Web Security Market, 2011–2015
- ▶ Microsoft SharePoint Market Analysis, 2011–2015
- ▶ Microsoft Exchange and Outlook Market Analysis, 2011–2015

You can view all our published and upcoming reports at www.radicati.com