

Take Control of Your PST Problem

Identify, filter and migrate PSTs into Exchange or Office 365 with Dell Software

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Abstract

To avoid the storage quotas and retention policies that apply to mailboxes on the server, users often create PST files in the Microsoft Outlook client. They can move or copy email from their main mailbox to a PST file on their desktop and keep as much email as they want, as long as they want.

However, PST files cause serious administration and compliance challenges for the organization. PST files increase the possibility of data loss, enable violation of email retention policies and make effective e-discovery nearly impossible—putting the organization at risk of loss of business-critical data and compliance failures that can result in fines and other penalties.

To minimize these risks, organizations are choosing to eliminate PST files and migrate existing PST file data into Exchange or Office 365. This paper explains the best practices for PST file migrations, describes the native tools available, and details how Dell™ Migration Manager for PSTs can simplify and speed the

migration process. It also offers suggestions of additional tools to help you effectively manage your Exchange or Office 365 environment after the migration. Whether you are looking to move PST files to on-premises Exchange or to Office 365, you *can* take control of PSTs.

Introduction

What are PST files?

Personal Storage Table (PST) files are files that users create in the Microsoft Outlook client to store some or all of their email. By moving messages from the server to a PST file (usually by clicking and dragging), users can avoid the storage quotas and retention policies that apply to their mailboxes on the server, so they can keep as much email as they like, as long as they like.

The risks of PST files

While PST files can seem like a great idea to users, PSTs pose grave concerns for messaging administrators, IT managers, compliance officers, CIOs and others responsible for email data

Enforcing corporate email retention policies on PST files can be nearly impossible.

in the organization. These concerns include the following:

- **Management challenges**—PST files are hard for administrators to manage because they're distributed across users' desktops. In fact, IT administrators cannot even know which users have PST files, or how many PSTs are in use across the organization. Users can create and populate PST files easily, and no notification is sent to the IT administrator. The only way for IT administrators to control PST files is to use Group Policy or a similar mechanism to prevent users from creating them.
- **Lack of compliance with data retention policies**—Enforcing corporate email retention policies on PST files can be nearly impossible. Users can keep email as long as they like, even if the retention policy requires its immediate deletion. That puts the organization at risk of violating compliance regulations. For example, if a user forwards an email that should have been deleted according to a retention policy, the company could be exposed to liability and compliance issues.
- **Risk of data loss**—When a user has a PST file open, it is locked and cannot be backed up. If a user accidentally deletes data, or a PST file becomes corrupt (and large PST files are prone to corruption), the data cannot be recovered. The costs of email data loss can be substantial, since this data is often not only business-critical, but also required for litigation.
- **E-discovery complications**—Satisfying discovery requests is extremely difficult if email is stored in PST files, since there is no way to search across all PSTs on all machines. This puts the organization at risk of fines and other litigation losses.
- **Degraded desktop performance**—Since users often create PST files to get past storage quotas, those files can become quite large. Opening and using large PST files can degrade desktop performance and hurt user productivity.

Migrating away from PST files

To mitigate these management headaches and compliance risks, many organizations decide to eliminate PST files altogether. Of course, they cannot

simply delete existing PST files, which often contain data that is important to the business, and that must be retained to meet regulatory requirements. Therefore, they need to move email data out of PST files and into Exchange or Office 365.

That migration process can be a challenge. How do you migrate PST file data without disrupting end users? How do you even find the PST files? How do you decide which data is important to keep, and what can be excluded from the migration? This document explains the best practices for migrating PST files, including how best to integrate a PST migration into a broader Exchange 2013 or Office 365 migration. Then it describes the native tools available to help with migration, and how Dell Migration Manager for PSTs can make your PST migration faster and easier.

Best practices for PST file migrations

As you plan your PST file migration, be sure to consider the following best practices:

Assess the scope of the project.

Choose a migration solution that can locate all PST files on all desktops in your organization. If multiple users log on to a given workstation, be sure to determine who owns each PST file.

Decide which data to keep, and how much.

Decide which data is relevant for your organization. For example, you might choose to keep email data but not calendar items, and you might decide to keep only the last 60 or 90 days of the email items. Reducing the amount of data to be migrated will improve the speed of your migration and reduce bandwidth and storage requirements. Choose a tool that can filter out the data you no longer want during the PST file migration.

Get support.

Email migrations are not an everyday task. In fact, most IT professionals have limited experience with them. Therefore, make sure that the migration solution you

choose includes support from experts with a lot of migration experience.

Verify migration success.

During and after the migration, you'll want to verify that all the required data has been migrated successfully. Choose a tool that offers good project management and reporting so you can monitor and review the history of the migration, including any issues or problems that occur.

Review your email retention policy.

Be sure to review and potentially revise your corporate email retention policy. In order to enforce a retention policy, you should migrate PST data to a primary mailbox or archive. Ideally, you want a Group Policy that prevents users from creating new PST files so that you do not have to perform a migration again in the future.

Plan how to manage the target environment.

Once you have all your email data consolidated in your Exchange or Office 365 environment, you need a strategy for protecting it. Therefore, before you migrate, evaluate tools and processes for reporting, capacity planning, compliance, archiving and recovery. For example, with good reporting and capacity planning tools, you'll be able to assess the size of your data set, rate of growth, the users with the largest mailboxes, and other important factors so you can plan effectively for future growth.

You'll also want tools that can perform e-discovery across your email system so that you can quickly and easily comply with litigation requirements. To avoid business losses, you will want the ability to granularly recover deleted messages. And you should consider investing in an archiving solution that can offload data to improve messaging system performance. Be sure to choose a solution that will comply with your email retention policy and enable continued user access to archived data.

Migrate PST files after the Exchange 2013 or Office 365 migration.

Exchange 2013 and Office 365 are very efficient at storage and enable you to store Exchange data on cheaper hardware. Therefore a migration to Exchange 2013 or Office 365 is a great opportunity to re-integrate large amounts of PST file data into the centralized messaging environment. But should you migrate your PST files before or after the broader migration project?

Migrating PST files before the Exchange migration can substantially increase the size of the dataset, and therefore, the length and complexity of the migration. Accordingly, the best practice is to move the PST files after the user mailboxes already exist in the target environment, and most of the email data has been moved over from the source server. Look for a tool that can de-duplicate messages from the PST file that already exists in the mailboxes from the primary migration.

The same best practice recommendation holds for consolidation projects as well. For instance, if you're consolidating multiple Exchange environments into one, or migrating in email data from an acquisition, begin by migrating email data on the server. Then, once all the user mailboxes are established in the target environment, migrate in the PST data.

Native tool for PST file migration

Microsoft offers a free solution for migrating PST files into Exchange or Office 365. However, the tool has important drawbacks. First, the PST file discovery process requires an agent to be installed on every desktop, which can cause bandwidth problems and results in a slow discovery process.

Second, the migration is a two-step process: the agent will copy all the PST files on the desktop to a central location, and then the migration proceeds using that central repository. And that second step is slow because the solution is not multi-threaded. You can only discover and manage a project for up to one

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thousand PST files at one time, which makes project management difficult and lengthens the migration timeline. In addition, the tool cannot filter the data; you must migrate all the data in a PST whether it's valuable or not.

Migration Manager for PSTs

Migration Manager for PSTs enables you to take control of your PST files. You can identify, filter and migrate PST files to primary or archive mailboxes in Exchange 2010/2013 and Office 365, quickly and reliably.

Advanced, agentless discovery

Unlike the native tool, Migration Manager for PSTs is completely agentless. Instead of having to deploy an agent to each desktop to search for PST files, you can discover all PST files in your environment from a central console. Migration Manager will even determine who owns each PST file. The solution supports all versions of PST files used in the Outlook client as well as the versions of PSTs exported from the server or from third-party locations, such as archives.

Direct migration path

Once the discovery is complete, Migration Manager for PSTs delivers a direct migration path. Rather than the two-step process required by the native tools, Migration Manager migrates PST data directly from the desktop, through the migration server, and into the target Exchange mailbox or archive.

Multi-threaded performance

Migration Manager for PSTs is multi-threaded, so it can migrate multiple PST files simultaneously. As a result, your migration project can be completed far faster than with native tools.

Multi-account support for Office 365

In Office 365, an administrator account is limited to 10 concurrent connections, which drastically limits the speed of a PST migration with native tools. Migration Manager for PSTs, on the other hand, uses multiple accounts to connect

to Office 365, overcoming this limitation and speeding the migration.

Filtering

Migration Manager for PSTs provides advanced filtering options to ensure that you move only the data you need to migrate. For example, you can migrate only email data and not calendar data. You can filter data based on date, so you can retain the last 60 days of email, for example. You can even exclude particular folders in a PST.

Migration to mailbox or archive

With Migration Manager, you can choose to migrate PST data to either the primary mailbox or the archive mailbox in your target Exchange 2010, Exchange 2013 or Office 365 environment.

Full project management and PowerShell scripting

Migration Manager for PSTs gives you complete visibility into your migration project, plus full project management functionality. For example, you can set up a task once and repeat it multiple times on different data sources. You can also automate manual tasks using PowerShell scripts.

World-class support

With Migration Manager for PSTs, you also get Dell's world-class support. When you call for support, you will always get a person to talk to about your issues—and that person will be an expert who knows migrations. You won't be stuck in a long queue, as you might if you were calling for help with a free native migration tool.

Dell migration and management solutions for Exchange 2013 and Office 365

As noted earlier, an important part of planning a PST migration project is planning how to effectively manage your Exchange or Office 365 environment after the migration is over. Dell Software offers many solutions to help with the management of your messaging environment.

Assessment, reporting and capacity planning with MessageStats

Dell™ MessageStats™ provides essential insight into your entire messaging environment, including Exchange or Office 365, from a single interface. MessageStats delivers the reporting and analysis you need to ensure your messaging environment is working efficiently, and to plan for future growth.

With MessageStats, you can

- Boost operational efficiency
- Maintain messaging performance
- Defend SLAs
- Simplify audits and future migrations
- Meet compliance demands
- Mine Exchange messaging data for insights into the business
- Obtain DLP reporting on policy matches to help protect the business.

Compliance with ChangeAuditor for Exchange

Dell™ ChangeAuditor™ for Exchange simplifies the audit process by tracking, auditing, reporting on and alerting on-premises Exchange configuration and permission changes in real time—without the overhead of native auditing. You can generate intelligent, in-depth reports to prove compliance and to protect your enterprise against both policy violations and the errors associated with day-to-day modifications.

ChangeAuditor for Exchange audits all critical changes to Exchange, including administrative groups, mailbox policies, and public and private information stores. All important information about each change event is preserved, including the four critical W's: who, what, when and where. Other key information preserved includes originating workstation details, plus the original and current values.

ChangeAuditor also supports role-based access, so you can prevent auditors from making configuration changes to the application, while allowing them to run searches and reports on their own.

This feature helps minimize the time you need to spend assisting auditors.

Archiving with Archive Manager

Dell™ Archive Manager is a complete email archiving solution for Exchange or Office 365. Archive Manager captures a single instance of each email message and stores it according to the granular retention and disposition policies you specify. This approach of storing single-instance email attachments separately from the message body and metadata dramatically reduces your long-term storage needs and improves the performance of your email servers.

Of course, to be useful, an archiving solution must still provide easy access to the archived email. With Archive Manager, you can retrieve messaging data quickly—for example, to satisfy legal requests. You can even accelerate the discovery process by tagging data for categorization or later review, ensuring that only relevant messaging data is exported for further analysis and presentation. And Archive Manager enables you to easily access archived messaging data from anywhere, including while you're offline, or from a mobile device.

Recovery with Recovery Manager for Exchange

Dell™ Recovery Manager for Exchange makes email recovery in Exchange or Office365 fast and easy—without the need for a dedicated recovery server. From a single console, you can search multiple email sources, including Office 365, production mailboxes (and archives), public and personal folders, offline Exchange (.edb) databases, Archive Manager and VSS snapshots. You can search on sender, recipient, date, subject, attachment or keyword. You also can search by advanced patterns and other custom queries, or compare an online mailbox with its backup to identify any changes.

After your search, Recovery Manager can export the data in your choice of formats (.pst, .eml, .msg or .txt formats), or to

MessageStats delivers the reporting and analysis you need to ensure your messaging environment is working efficiently, and to plan for future growth.

an Exchange online mailbox, archived mailbox, public folder, Office 365, or Archive Manager). Recovery Manager can find and retrieve data across native Microsoft backups and most major third-party backup software. These include: NetVault Backup and NetVault Fast Recovery from Dell Software, EMC NetWorker, IBM Tivoli, Microsoft Data Protection Manager, and Symantec Backup Exec and NetBackup.

Conclusion

PST files are a tempting way for users to get around storage quotas. But because PST file data cannot be effectively backed up, controlled to meet compliance regulations or included in e-discovery

efforts, PST files ultimately introduce far more problems than they solve.

Fortunately, with tools from Dell Software, there's no reason you can't take complete control of your PST problem. Migration Manager for PSTs can quickly and efficiently migrate PST data into your Exchange or Office 365 environment, where you can manage it easily and effectively using solutions like MessageStats, ChangeAuditor, Archive Manager and Recovery Manager.

With these tools, you can eliminate PST files forever, and thereby reduce the risk of data loss, enable effective e-discovery and ensure compliance.

For More Information

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