

Sanlam Achieves E-mail Efficiencies by Implementing Quest® Archive Manager

Sanlam was established in 1918, and is a leading financial services group. Punter Southall and Co is a business unit within the Sanlam Financial Services (SFS) group of companies. The corporate head office is responsible for the Group's centralized functions, which include strategic direction, financial and risk management, group marketing and communications, group human resources and information technology, corporate social investment and general group services.

The Challenge

Sanlam Financial Services was experiencing a number of issues with their Microsoft Exchange infrastructure. Across their six Exchange sites, the information stores had grown to significant sizes in most locations, which had implications on their backup and recovery times, and were also a concern with regard to the organization's imminent migration to Exchange 2003.

In addition, although their strategy of encouraging users to archive their own e-mail to Outlook personal store (PST) files had been somewhat successful, it had led to a dispersed collection of files across the organization. There was no guarantee that a copy of an e-mail could be recovered from a centralized store, should a user move an item to their local personal store. There were also compliance issues, as it made it complex to attempt to retain a copy of all e-mail messages flowing through the system.

When looking for an e-mail management solution, Sanlam identified several key drivers: managing the ever-increasing volumes of e-mail, delivering enhanced e-mail management (including advanced search capabilities), compliance and a need to reduce e-mail volumes within Microsoft Exchange.

The Quest Solution

Sanlam found the setup of Quest® Archive Manager extremely straightforward, and the whole process was completed in less than two hours. It was simply a case of installing and configuring the software on a dedicated Microsoft SQL Server 2000 server, and then configuring Archive Manager to connect to each Exchange site to retrieve the mail. "Archive Manager's easy-to-use Web interface allowed us to monitor this process from the start, through easily accessible real-time storage statistics," said Robin Talbot, group IT director, Sanlam.

Sanlam selected Archive Manager for several reasons. Archive Manager's non-obtrusive interface with Exchange meant no changes that could potentially impact the existing e-mail architecture. It was able to help reduce the size of the data in the Microsoft Exchange Server. Backup and recovery is now a fast and easy process. It improves the availability and resilience of e-mail, and compliance issues relating to e-mail can now be resolved.

"The advanced searching facility is impressive, enabling searches down to phrases contained within e-mails or attachments, with immediate results. Searching therefore becomes much more powerful," said Talbot.

Overview

"We were initially attracted to the product because of its non-obtrusive interface with Exchange. The only setup we had to make on the Exchange 5.5 boxes was to enable journaling, so there were no changes that could potentially impact the existing e-mail architecture."

- Robin Talbot,
Group IT Director,
Sanlam

Headquarters

Bellville, South Africa

Critical Needs

A solution to help with the information stores that had grown to significant sizes, which caused concerns with backup and recovery times and migration to Exchange 2003.

Solution

Quest® Archive Manager

Results

- Quickly installed and configured
- Sent and received e-mail messages that were captured, stored and easily accessed
- Improved e-mail storage management and server performance
- Provided greater accessibility to messages and corporate knowledge



The Bottom Line

"We were initially attracted to the product because of its non-obtrusive interface with Exchange. The only setup we had to make on the Exchange 5.5 boxes was to enable journaling, so there were no changes that could potentially impact the existing e-mail architecture," said Talbot.

Now, using Archive Manager, all e-mail messages sent and received are captured, stored and easily accessible, resulting in the following key benefits: installation and configuration were completed in only two hours; only one person from Sanlam was involved in the installation and the ongoing administration; Archive Manager "elegantly used a simple combination of SQL Server and file storage as its foundation," and advanced searching facilities within the product allowed for efficient searching and fast retrieval of these items.

The administrator account is now locked down to ensure that security is retained. Once an e-mail message is found, it cannot be modified, ensuring the overall system complies with records management policies. Archive Manager is providing benefits across the whole organization, improving e-mail storage management and server performance, and providing greater accessibility to messages and corporate knowledge.

About Sanlam

Sanlam was established in 1918 and is a leading financial services group in South Africa. It is listed on the JSE Securities Exchange in Johannesburg and on the Namibian Stock Exchange. The Sanlam group conducts its business through Sanlam Limited, the corporate head office, and four business clusters: life insurance, short-term insurance, investment and independent financial services.

Punter Southall and Co is a business unit within the Sanlam Financial Services (SFS) group of companies. Founded as a new breed consultancy in 1988, their growth to date has taken them to more than 380 people with offices in London, Aberdeen, Birmingham, Boston, Edinburgh, Glasgow, Guildford, Richmond-upon-Thames and Wokingham.

About Quest

Quest Software, Inc. delivers innovative products that help organizations get more performance and productivity from their applications, databases and infrastructure. Through a deep expertise in IT operations and a continued focus on what works best, Quest helps more than 18,000 customers worldwide meet higher expectations for enterprise IT. Quest Software can be found in offices around the globe and at www.quest.com.