



transvault
Let's move together



PST Insight

Frequently Asked Questions

Date: October 2020

Version: 1.0

Transvault is a trademark of Transvault Software Ltd

This document contains proprietary and confidential information and may not be shared with any 3rd party without the express written permission of Transvault.

Microsoft 365 and Office 365 are registered trademarks of Microsoft Corporation.

IMPORTANT: The information in this document is to act as a guide only. Transvault shall not be liable for technical or editorial errors or omissions contained herein. No warranties or any kind are made, including the accuracy of the information contained herein, or whether this information reflects the latest capability of the technology referenced.

www.transvault.com



Contents

1. What is Transvault PST Insight?	3
2. What PST versions are supported?	3
3. Does PST Insight have the ability to access password protected files?	4
4. What information will Transvault PST Insight give me?	4
5. Why are PST files such a problem?	6
6. How does Transvault Insight compare with other PST migration solutions?	6
7. Can PST Insight migrate directly to the cloud or does it centralize them first?	7
8. How quickly can PST Insight move my PSTs?	8
9. How is Transvault PST Insight architected?	8
10. Does the tool have the ability to disconnect PSTs from Outlook and or delete them from disk?	10
11. How do we know that our PSTs are being handled properly?	10
12. Does PST Insight have the ability to schedule and throttle PST ingestion?	11
13. How long will my PST migration project take?	11
14. Can I migrate PST contents into my existing third-party archive?	12
15. Can I move PST contents into Exchange or Office 365?	12
16. What if some of our PSTs contain shortcuts to emails in our existing central archive?	13
17. Can I use PST Insight to collect together emails that are relevant to eDiscovery? ..	13

1. What is Transvault PST Insight?

Transvault™ PST Insight is a high-performance application that puts organizations in control of their PST files. Available as an on-premises or Azure-based service, and designed to meet the needs of the largest enterprises, Transvault PST Insight delivers:

- **Enterprise Scalability** – A highly scalable, yet low-footprint architecture that can be extended across your entire network and delivered across the cloud to ensure optimum performance and ease.
- **Content-Level Visibility** – Whether located on file shares, local hard disks or even removable media, PST Insight gives organizations a detailed view of actual PST *contents*.
- **Content or File Level Operation** – Either the individual messages within a PST or whole PSTs can be managed and migrated as required.
- **De-duplication** - Automatic single instancing of duplicate PST file contents 'at source' resulting in significant savings.
- **Advanced Reporting & Risk Analysis** – PST contents can be analyzed and reported on according to centrally defined criteria. For example, you can get clear visibility of what PST contents fall outside of your retention policies, and what content represents a potential risk (e.g. emails with spreadsheet attachments).
- **Data Loss Prevention (DLP)** – A central framework for identifying, monitoring, and protecting data held in PSTs, prevents loss of data through unauthorized use of PSTs or inadvertent loss or corruption.
- **Policy-Based Management** – PST contents can be migrated or managed 'in place' according to centrally defined policies.
- **Migration** - Fully-audited, policy-driven content migration into:
 - Microsoft Exchange primary mailboxes or In-Place Archives
 - Microsoft Office 365 primary mailboxes or In-Place Archives
 - Microsoft's Drive Shipping or Azure upload service
 - Virtually any third-party archive service, both onsite and hosted
- **Full Auditing** – Transvault Insight eliminates opportunity for human error associated with manually-driven PST migration tools and maintains detailed audits and progress logs of all management and migration activity, enabling you to confirm that PSTs have been dealt with in accordance with your policies.

2. What PST versions are supported?

Source PST formats supported include both ANSI and Unicode versions as follows:

- Outlook 97-2002 format
- Outlook 2003 and above



3. Does PST Insight have the ability to access password protected files?

Yes. In the vast majority of cases, we have found that PST files have only simple password protection which can usually be overcome. Therefore, in most circumstances, Insight will process PST files with simple password control and can also provide the internal details of the files if/when requested.

It is outside the remit of Transvault PST Insight to decrypt encrypted PST files. Instead, the owners of such files are detected and logged. With these details the administrator can request that some form of action is taken (by the user/owner) to get the files decrypted and therefore made available for migration.

4. What information will Transvault PST Insight give me?

Whether stored on network shares, local hard disks or on removable drives, Transvault PST Insight makes a detailed inventory of your enterprise-wide PST estate that includes:

- PST custodian/owner identification (based on an adjustable percentage message recipient analysis and/or location path)
- Location
- Size
- Content profile – how many messages, calendar items, tasks, message classes
- Age profile – on a per PST or scanned sample basis
- Number of messages
- Date last updated
- Message classes
- Whether any shortcuts to archived emails exist (and if so, how many)

This information can be further analyzed and reported on according to areas of concern:

- Are PSTs in places they shouldn't be (e.g. on removable media)?
- What PST files are dormant?
- Are there items older than the corporate retention policy?
- Is evidence relevant to an eDiscovery exercise out there?

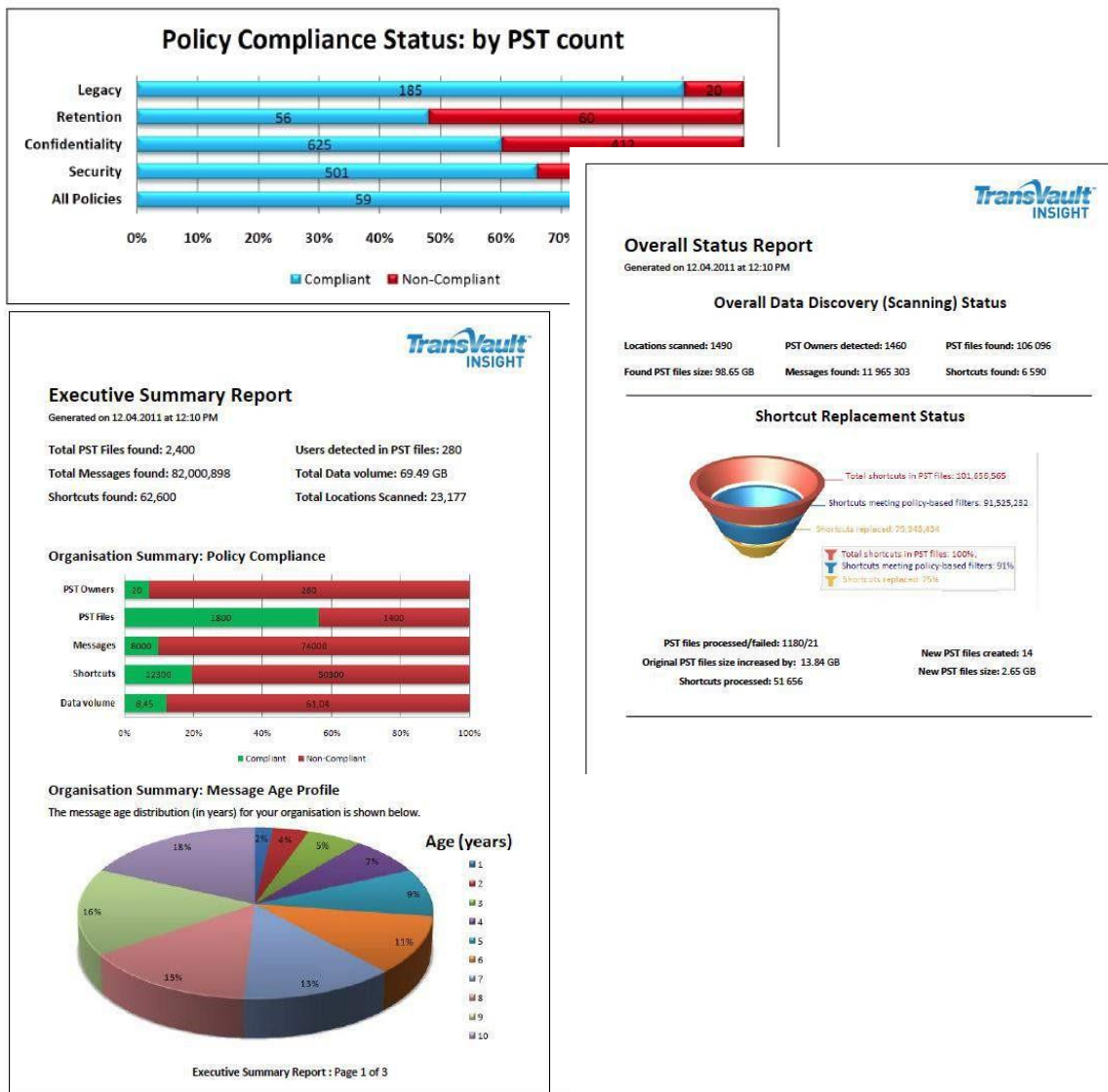
Using this information organizations can devise appropriate **policies** to manage and/or migrate PST contents in line with business, operational and compliance needs.

Note that Transvault PST Insight is delivered with a set of purpose-built reports as well as a comprehensive set of SQL views which can be used to produce extensive, flexible reporting as required.

In-built reports include a **Chain-of-Custody** report of all actions carried out, a **Policy Compliance Status** report that shows the amount of data compliant (and non-compliant) with each your goal policies, an **Activity Report** which shows progress of all command activity and an **Executive Summary Report** of all PSTs discovered which includes a profile of age, message class, attachment type and how PSTs compare with company policies overall.

Any corrupted items can also be flagged.

For example:



5. Why are PST files such a problem?

PST files were originally intended to provide offline/disconnected storage for email users. The use of PST files to provide an email storage overflow area under the control of end users, however, has become standard practice.

Although improved remote access, offline synchronization into OST files, extended storage options including third-party archives, the increased storage space now available in Microsoft Exchange and Office 365 and desktop virtualization, are signposting their demise, PSTs remain a 'fact of life' for many organizations.

Eradicating PSTs, however, creates many challenges including:

- PSTs are difficult to keep track of - users can create them 'at will'
- Staff can take PST files home on laptops and removable drives
- PSTs often exist on local disk drives that do not get backed up
- They are prone to corruptions as they grow in size
- PST files can only be accessed by one user at a time, making them difficult to share with a team or include in eDiscovery exercises
- When email is scheduled for elimination/disposition, PST files are likely to contain rogue email copies that will not be properly disposed of, creating the potential for unnecessary exposure.

6. How does Transvault Insight compare with other PST migration solutions?

There are many factors that set Transvault PST Insight apart from other PST migration solutions:

- **Enterprise Scalability.** Transvault PST Insight was developed from the ground up to meet the PST migration and management needs of the largest enterprises. See also response to Q8 which describes the Transvault PST Insight architecture.
- **Unparalleled Visibility.** Whether on file servers, local disks, office-based systems or roving laptops, Transvault PST Insight gives organizations a total, overall view of their PST content with the ability to drill down on areas of interest.
- **Content-level - not just File-Level - Management.** Rather than working with PST files at the 'file level', Insight gives organizations granular, content-level control over their PST files. For example, you can: Elect to migrate only those items that are subject to the organization's retention policy
- Exclude junk and deleted folders
- Identify duplicates and only copy one instance of a duplicate across the network □ This capability has the benefit of reducing both storage and network impact.

- **Manage 'In Place' Option.** It's not always convenient, practical or politically acceptable to remove PST files. Insight gives the option to manage PST contents without moving them. For example, you can create a copy of specific items that are subject to an investigation, without changing the PST file as far as the end user is concerned. You can also delete 'in place' items that fall outside your company's retention policies.
- **Support for Virtually any Onsite or Hosted Archive.** Organizations using Transvault PST Insight to migrate their PSTs have the option to move data into virtually any third-party archive service (onsite or hosted) or a Microsoft archive including Exchange personal archives and Office 365. You can also prepare PSTs for ingestion using **Microsoft's Drive Shipping or Azure upload service.**
- **Shortcut Support** – Transvault PST Insight detects and manages any shortcuts to archived emails that may have been put into PSTs. This includes the ability to 're-hydrate' shortcuts from the original archive in the event that an organization chooses to migrate from a third-party archive to a service that does not work using shortcuts, such as Microsoft Exchange or Office 365.
- **Assurance.** PST Insight lets you monitor every aspect of your PST estate and ongoing management activity. For example, you can track the progress of your policy-based enforcement and produce reports to give you peace-of-mind that your PSTs are under control.

7. Can PST Insight migrate directly to the cloud or does it centralize them first?

With PST Insight you can migrate to your preferred destination in **one direct step** over encrypted transaction pipes. This includes the ability to migrate all or selected PST contents directly into Office 365, and be targeted as you do so. For example, you could move items over a certain age directly into In-Place archives.

There's no need to pre-stage data onto interim storage, an additional step that can easily lead to data loss or tampering.

Importantly, automated ownership assignment means there's no risk of moving PST contents into the wrong destination mailbox, it also obviates the need for someone to actually look at PST contents to check who it belongs to.

8. How quickly can PST Insight move my PSTs?

Transvault PST Insight's ability to perform selective migrations direct from source to target, and de-duplicate content 'on the fly' significantly reduces traffic overheads.

In one project a customer was able to pre-cull and de-duplicate PST contents for ingestion into an eDiscovery platform. As a consequence they reduced the amount they had to 'pull across' the network by 90% - massively reducing impact on the network and speeding up eDiscovery times.

Also note that Transvault PST Insight includes Transvault CloudStream, a service which combines the latest Microsoft ingestion technologies with sophisticated algorithms, such as traffic flow analysis, to guarantee unrivalled ingestion speeds directly into Office 365.

Where available, Transvault PST Insight can use Microsoft Azure ExpressRoute to optimise throughput even more.

Commands can be scheduled to run in sequence, at specific times/dates or on a recurring schedule. It should further be noted that Insight does not ingest PSTs, it ingests messages. This is an important distinction to make as it materially affects the output, volume of data to be migrated, policies applied to the migration, reduction of duplicates being ingested etc.

There are configuration parameters that can throttle the amount of work each controller will do (where controllers are responsible for 'speaking with' the agents). You can also change the number of agents working on a given Command (COPY, DELETE, SCAN, etc).

It should be noted though, insight does not have a single control to limit the data throughput.

Yes. Note that threading is achieved at a controller level. Each controller has multiple threads and it is possible to have multiple controllers. The optimum architecture for Insight controllers can be determined following closer analysis of the enterprise topology.

9. How is Transvault PST Insight architected?

Transvault PST Insight has been designed with a highly scalable yet low-footprint framework that eases the process of locating and interacting with PST files across complex and/or distributed environments.

It features a 3-tier master, controller and agent model that may be deployed on-premises or in the cloud:

Regional offices or physically isolated network segments are managed by a **Controller** that is responsible for instructing and co-ordinating data-flows from PST Insight **Agents**.

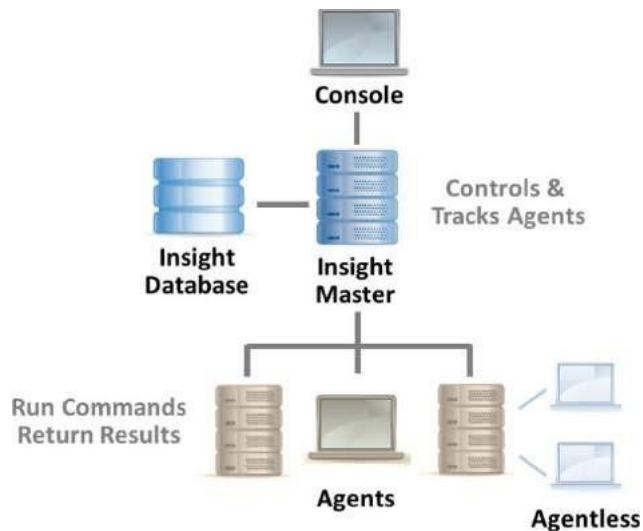
Agents can be deployed in a number of ways:

- On the same system as the **Controller** scanning all visible workstations,
- as **Key Agents** deployed on workstations that in turn scan locally accessible systems (i.e. no client required on desktops), and
- as **Full Agents** installed directly on individual desktops or laptops, enabling the tightest possible control of removable media and user activity.

Commands to scan PST contents, collect items, delete items, and so on, are executed according to policies that are defined by the administrator and initiated at the **PST Insight Master** using an administrative console.

Once a command and policy has been received by a Controller, the Controller will communicate with all Agents and instruct and monitor the running of a Command.

Continual updates on command progress, as well as any content extraction results, are sent back to the Controller by Agents.



Dynamic routing policy and load balancing is implemented to ensure the best route to PST files is used at all times and to minimize network impact.

10. Does the tool have the ability to disconnect PSTs from Outlook and or delete them from disk?

Yes, unlocked PSTs can be deleted from the desktop or file shares, and can also be deleted from removable drives on desktops.

PST Insight can also 'force close' Outlook to enable features that are prevented by Outlook being open, such as deletion. Note that PST Insight deletes messages first and then deletes the PST file when it's empty.

11. How do we know that our PSTs are being handled properly?

The TransVault PST Insight Console shows all activity being carried out at any point in time. It also keeps an audit of every action being carried out that you can report on.

Administrators can also use the TransVault PST Insight console to automatically send ongoing status notifications by email, as well as generate and save/send reports on the completion of a Command.

The benefit of this is that administrators can set a task running and know that they do not need to return to the console until notified.





12. Does PST Insight have the ability to schedule and throttle PST ingestion?

Yes. Commands can be scheduled to run in sequence, at specific times/dates or on a recurring schedule.

It should further be noted that Insight does not ingest PSTs, it ingests *messages*. This is an important distinction as it materially affects the output, volume of data to be migrated, policies applied to the migration, reduction of duplicates being ingested etc.

13. How long will my PST migration project take?

We know from experience that every migration environment is different. PST migration, whilst simple in concept, is actually very complex in practice. This is because of the large number of variables such as the specification of the servers hosting the archives and Transvault products, the destination platform (for example, if you are migrating to Office 365, different locations in the world experience different ingestion speeds), the network speeds within your organization, whether or not the source PST is being used during extraction, to name a few.

For this reason we recommend you carry out an PST Insight Trial which will help you to see the actual migration behaviour for the environment in question and help you establish how best to optimize performance using multiple distributed components, multiple threads, etc. The data about throughput that you gain from doing the Trial may be extrapolated to get a good idea of how long the production migration might take.

Bear in mind that the ability to be selective over what gets transferred across the network (e.g. only items less than 7 years old) and eliminate any duplicate contents has a significant impact on reducing network transfer times.

In one project a customer was able to pre-cull and de-duplicate PST contents for ingestion into an eDiscovery platform. *As a consequence they reduced the amount they had to 'pull across' the network by 90% - massively reducing impact on the network and speeding up eDiscovery times.*

Also note that Transvault PST Insight includes Transvault CloudStream, a service which combines the latest Microsoft ingestion technologies with sophisticated algorithms, such as traffic flow analysis, to guarantee unrivalled ingestion speeds directly into Office 365. Where available, Transvault PST Insight can use Microsoft Azure ExpressRoute to optimise throughput even more.

14. Can I migrate PST contents into my existing third-party archive?

Yes. Transvault PST Insight optionally supports migration into virtually any third-party email archive. For a list of all supported platforms visit www.transvault.com.

15. Can I move PST contents into Exchange or Office 365?

Yes. Transvault PST Insight supports EWS-based ingestion directly into Microsoft Exchange or Office 365.

In fact, a switch to Office 365 - with its large storage capacity, access anywhere service and centralized search and eDiscovery - is the **perfect opportunity to eliminate PSTs**.

Additionally, if you are choosing to roll out desktop virtualization along with your cloud strategy, this in an environment in which PST are difficult to support 'locally' and PSTs have never been officially supported by Microsoft operating across the network!

PST Insight will enable you to move PST contents directly across the network into Office 365. You can also target content to primary mailboxes or In-Place archives based on centrally defined policies.

For example:

- Move items <1 year old to Primary Mailboxes
- Move items >1 year (but less than 7 years) to In-Place Archives

You might also elect to migrate PST contents belonging to **leavers** into Office 365 and then make the corresponding mailbox **Inactive**. This can be done without a license penalty, yet it ensures this data remains discoverable.

What's more, by migrating PSTs to Office 365, organizations can get to perform eDiscovery across their contents –something that is practically impossible to achieve with PSTs located on individual hard drives.

16. What if some of our PSTs contain shortcuts to emails in our existing central archive?

Transvault PST Insight is able to detect and report on shortcuts, giving you the option to take a number of different desired actions. This might include:

- Deleting any shortcuts in PSTs to avoid confusion
- Updating the central archive and optionally putting a shortcut back in the users's Outlook view
- Re-hydrating the shortcut from the existing central archive and putting the complete item into a new archive system such as Microsoft Exchange personal archives or Office 365.

17. Can I use PST Insight to collect together emails that are relevant to eDiscovery?

Yes. Organizations can use Transvault PST Insight to cull data at source according to date range, sender and recipient, etc., as well as eliminate duplicates. This can significantly reduce data review and preparation costs.

Also many Early Case Assessment and eDiscovery systems use PSTs as their preferred input format. For example, you can use Transvault PST Insight to upload data directly into Microsoft's Office 365 Advanced eDiscovery system or into platforms like LexisNexis.