



In-Depth Buyer's Checklist for Archiving Software

How can your organization benefit from an archiving solution?

Data preservation and compliance can be tricky, but archiving software has become more and more innovative so that it can now manage an organization's entire digital footprint and take the guesswork out of the process.

When you're evaluating archiving solutions, it's important to understand what your requirements are and what capabilities you need. Consider your organization's culture as well; information governance is more than just software but involves creating a culture of governance and compliance. Finding software that makes it easier for you to create that culture and enhance relationships between departments is critical.

When investigating an archiving solution, an organization must consider its existing document management policies and future needs, including:

- Data volumes and anticipated growth
- Compliance and regulatory requirements – current and future
- Legal discovery requirements
- Resources available to administer and manage an archiving solution

What's in this document?

- 1 Considerations
- 1 Integration & Management
- 2 Data Classification
- 2 Retention & Deletion
- 2 Reporting & Logging
- 2 Demo Video
- 2 Security
- 2 Scalability
- 3 Support
- 3 Total Cost of Ownership (TCO)
- 3 Looking Beyond Technology
- 3 Next Steps

Integration & Management

Having a central dashboard to manage all organizational data streamlines information governance. It's also critical that the solution integrate seamlessly with existing business software.

Some questions you need to ask:

- Does the software offer a central administrator dashboard?
- Can the solution integrate with legacy applications?



- Does the solution offer automation of common functions?
- Does it support unstructured as well as structured data?
- Can it perform real-time search?
- Is the platform hosted or on-premises?

Data Classification

Data classification enables organizations to define rules for preserving data to ensure important information assets are not deleted or lost.

Some questions you need to ask:

- Can the solution create robust classification rules?
- Can the solution auto-classify information?
- Are classification rules and identifiers easily defined, maintained and revised?

Retention & Deletion

The flexibility to set retention and deletion periods ensures that digital information assets cannot be maliciously or accidentally deleted. In addition, litigation hold capabilities further protect the integrity of documents from deletion or spoliation.

Some questions you need to ask:

- Can information retention/deletion be customized and revised at various levels (repository, user, group)?
- Can information retention/deletion be defined by regulatory compliance needs?
- Will the solution suspend scheduled deletions during a litigation hold?
- Can the solution immediately hold specific documents upon archiving?

- Does the solution offer compression and de-duplication?

Reporting & Logging

The ability to log and report for compliance, security, and insider threats is something an end-to-end information governance solution should offer.

Some questions you need to ask:

- Is an audit trail available?
- Is reporting available on audit and review functions?
- Does the software deliver real-time monitoring functionality?

Want to learn more?

[Watch a short video](#) on Daegis AXS-One archiving solution.

Security

To best protect your information assets, a robust solution will automatically apply encryption using pre-determined compliance and privacy policies.

Some questions you need to ask:

- Can information be automatically encrypted during archiving?
- Can encrypted information be previewed to ensure its integrity for compliance, legal, or audit requirements?
- Are archived log files encrypted?

Scalability

In addition to customizability, an archiving solution should have the ability to easily



accommodate future growth for both your business and information assets.

Some questions you need to ask:

- ❑ How much information can the solution accommodate at present and what is the future growth potential?
- ❑ Are there any limitations on records, users, or servers?
- ❑ How easy is it to downgrade if storage requirements are reduced?

Support

Users can only experience the benefits of an information asset management solution if they are fully educated on its use and offered support to maintain its performance.

Some questions you need to ask:

- ❑ Is initial training and on-boarding offered by the solution provider?
- ❑ Is ongoing support included with the solution?
- ❑ What is the policy for maintenance and upgrades offered by the solution provider?

Total Cost of Ownership (TCO)

The total cost of an archiving solution can vary greatly, with those hosted in the cloud requiring the least upfront investment.

Some questions you need to ask:

- ❑ What is our budget for implementing an information governance solution?
- ❑ How much are we currently spending on data storage and infrastructure?
- ❑ What options exist to fulfill our needs and meet our budgetary requirements?

- ❑ Would we be better suited for an on-premises solution, or a cloud solution?

Looking Beyond Technology

Getting Management's Buy-In

Management, executives, and stakeholders should all be educated on the value of the solution and the vast benefits it will bring to the company. Let your solution provider assist in this process.

Demonstrate Proof-of-Concept

A proof-of-concept is an opportunity to demonstrate the capabilities of an archiving solution. This can easily confirm the solution's anticipated success via hands-on testing prior to implementation.

Partnering with the Right Vendor

User adoption of new solutions can be understandably challenging, but a good solution provider will ensure that downtime is limited and that the transition is as seamless as possible.

Next Steps

There is no one-size-fits-all "best" archiving solution. For most organizations the best solution will be one that aligns with your business objectives, makes end-users lives easier, and is backed by an experienced solution provider.

By assessing your entire digital footprint, identifying major risks, and delivering a solution that is tailored to the specific requirements of your organization, a good solution provider will become a partner that you can trust for all your data management needs.

