

**bluesource**

# Your Data Governance Experts

## Why Bluesource?

Every organization needs data governance: implementing internal standards and workflows, understanding legal and industry regulations, optimizing tools and software, and managing the constantly growing amount of data.

Bluesource helps businesses and government agencies take control by preserving what's important and expiring what's not. Our experienced team works with you to determine the best tools, software, and workflow to classify, collect, and manage data effectively.

Bluesource is the extra set of hands your IT, Compliance, and Legal teams can leverage to build and maintain up-to-date data governance programs that align with all your requirements.

## Areas of Expertise

### Data Migrations

Over 15 years of migration experience with email, archive migrations, tenant-to-tenant, and PST files.

### Managed IT Services

An extension of your IT team. Leave the day-to-day to Bluesource.

### eDiscovery

Full EDM Support and On-demand eDiscovery experts.

### Archiving

Improve system performance and protect email, files, and other data.

### Compliance + Governance

On-demand experts for GDPR, FINRA, HIPAA, 17a-4 and many other regulations.

### Training + Consulting

Maximize tech investments and time with Bluesource's expert knowledge and experience.

# Products We Support

## Microsoft™

Decades of experience with Microsoft



365



Purview



Exchange



Azure

## Arctera™

Accredited Arctera™ Gold Partner



Enterprise  
Vault



eDiscovery  
Platform



Insight  
Platform



InfoScale



Backup Exec

## Veritas™/Cohesity™

Experts in Veritas - now under Cohesity



NetBackup

## Migration and Cloud Storage Solutions



ArchiveMASH™



Cloudlocker™

Seamlessly and  
securely move data  
from point A to  
point B



# Data Migration

# Migration Experts

## Email and File Archive Migrations

With over 15 years of experience, Bluesource ensures smooth migrations for email, files, archives, tenant-to-tenant transitions, and PST files. Our proven process minimizes risk and downtime.

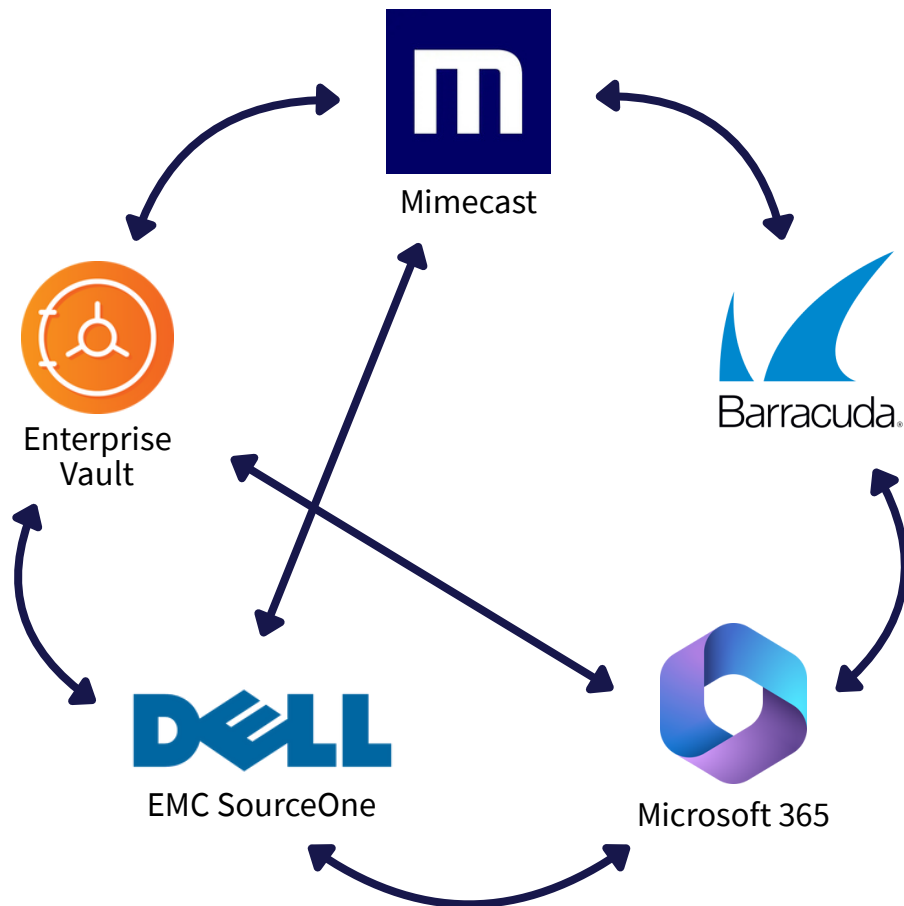
### Email Migrations

Bluesource began with a focus on Microsoft Exchange. That was a couple of decades ago, but email migrations remain a core part of our services.

### Archive File + Storage Migrations

Free up resources and time, stay on budget, and meet regulatory demands with the help of skilled Bluesource data archive migration experts.

Common Migrations



# ArchiveMASH™

Your data is migrated quickly and efficiently with ArchiveMASH™, Bluesource's archive migration software.



## Defensible

Maintaining the chain of custody is of utmost importance. ArchiveMASH™ tracks metadata and identifiers for all messages migrated, including any exceptions. If you need expert testimony or affidavits in support of the migration practices and reporting, our team is ready to provide any required information.

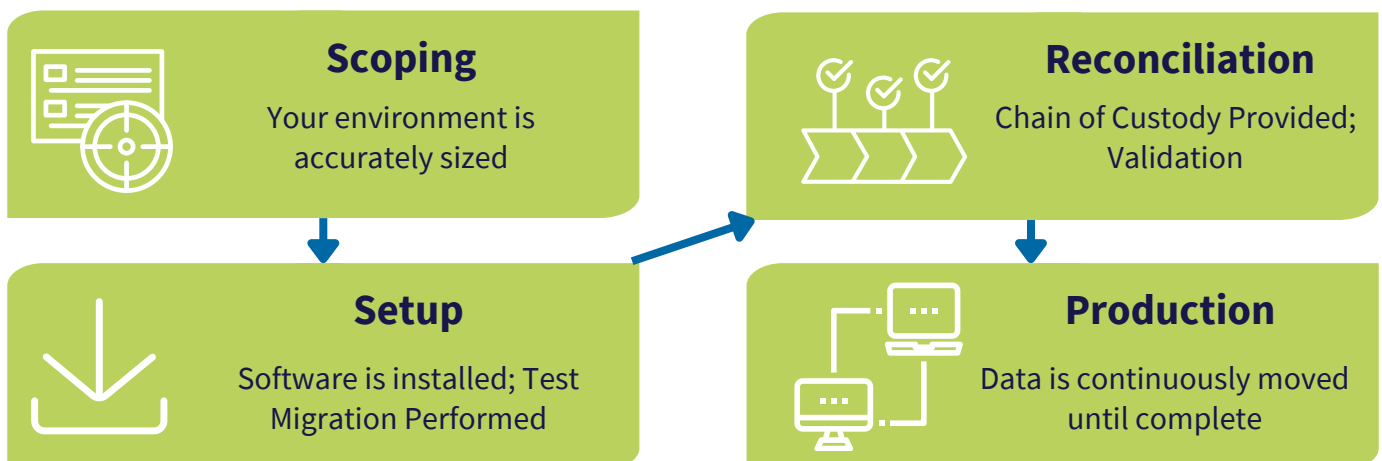
## Managed, End-to-End

Bluesource delivers ArchiveMASH™ as part of a fully managed migration service. Our dedicated migrations team installs and configures ArchiveMASH™, then delivers the migration until all data has reached its destination.

## Industry-Leading Migration Features

- Migration filters: date range or custodian
- Schedule-based throttling
- Customizable reporting
- In-memory conversions
- Multi-threaded tasking
- Shortcut conversion included
- Lightning-fast storage migrations

## Our Proven Process



An extension of  
your IT team.



# Managed Services

# Bluesource Managed Services

Give your IT team the time to focus on where they are needed the most. Allow Bluesource to handle day-to-day admin work, data governance management, or eDiscovery requests. Our proactive delivery model helps ensure the best performance.

One enterprise firm saved over  
**7,500 hours**  
(That's 312 days)

## Stay Up-to-Date

It's our experts' job to stay current with ever-expanding enterprise technology. We help determine the right products, strategize to meet your needs, and stay up-to-date.

## Benefits at a Glance

- 24 /7/365 support
- 99.9% uptime guarantee
- Adherence to ITIL framework and ISO 27001
- Knowledge of GDPR, HIPAA, FINRA, SOX, and other regulations
- Annual Application Health Check
- Support for on-premises, cloud or hybrid solutions
- Apply upgrades, patches and hotfixes

## Managed Service Offerings

**EV247**

**NBU247**

**eDP247**

**DiscoveryAssist**



# EV247™

Enterprise Vault 24/7

## Cloud Archiving Without Compromise

Optimize Arctera™ Enterprise Vault management and workflows with EV247™, our 100% fully managed Enterprise Vault solution.

Large enterprises can save thousands of hours each year, and smaller companies save hundreds, leaving more time to focus on driving your business forward.



Enterprise Vault

### Guaranteed Availability

EV247™ guarantees the availability of your data:

- 99.9% uptime SLA
- Performance guarantee
- Response time guarantee

### Improved Cost-Efficiency

With cloud economics, businesses benefit from a lower total cost of ownership, without sacrificing functionality.

- Upgrades and patches for no additional charge
- Peace of mind with predictable spending

### Cloud-First Directives

Moving from on-premises EV to a cloud-based system with Azure includes all the perks of being cloud first - including: no longer dealing with

- Aging infrastructure
- High management costs
- Power and cooling costs

# NBU247™

NetBackup 24/7

## Keep Your Business Information Protected

With businesses creating more data than ever before, any corruption, disruption, or loss of information to unauthorized users can significantly affect the corporate bottom line.

Having a mishmash of different backup technologies, in different locations, for different applications and workloads, makes having a comprehensive backup solution a necessity.

Enjoy peace of mind knowing that your full backup is available upon demand, in case of a disaster.

## Benefits at a Glance

- Minimize loss of productivity and downtime by accelerating the recovery time of backed-up data.
- NBU247™ with Bluesource is the economical solution to retaining backup data, relieving upward pressure on storage costs.

## Services

- Backup strategy and planning
- Backup audits and troubleshooting
- Disk, tape, and cloud storage

## Supported Technologies

Veritas\*



NetBackup™

\*A part of Cohesity

Arctera™



Backup Exec

## The Cost of Downtime

The estimated cost of one hour of downtime for different-sized companies.

**\$16,500**

Small Company

**\$140k**

Mid-size Organization

**\$1.54 M**

Large Enterprise

Helping you find  
that needle in the  
haystack

**eDiscovery**



# Bluesource eDiscovery Services

Searching through thousands of emails, messages, and social media, to respond to a legal or regulatory request takes valuable time away from your team. Bluesource solutions cover every stage of EDRM with Microsoft Purview Advanced eDiscovery and Arctera eDiscovery Platform.

One client  
experienced a cost  
reduction of

# 20%

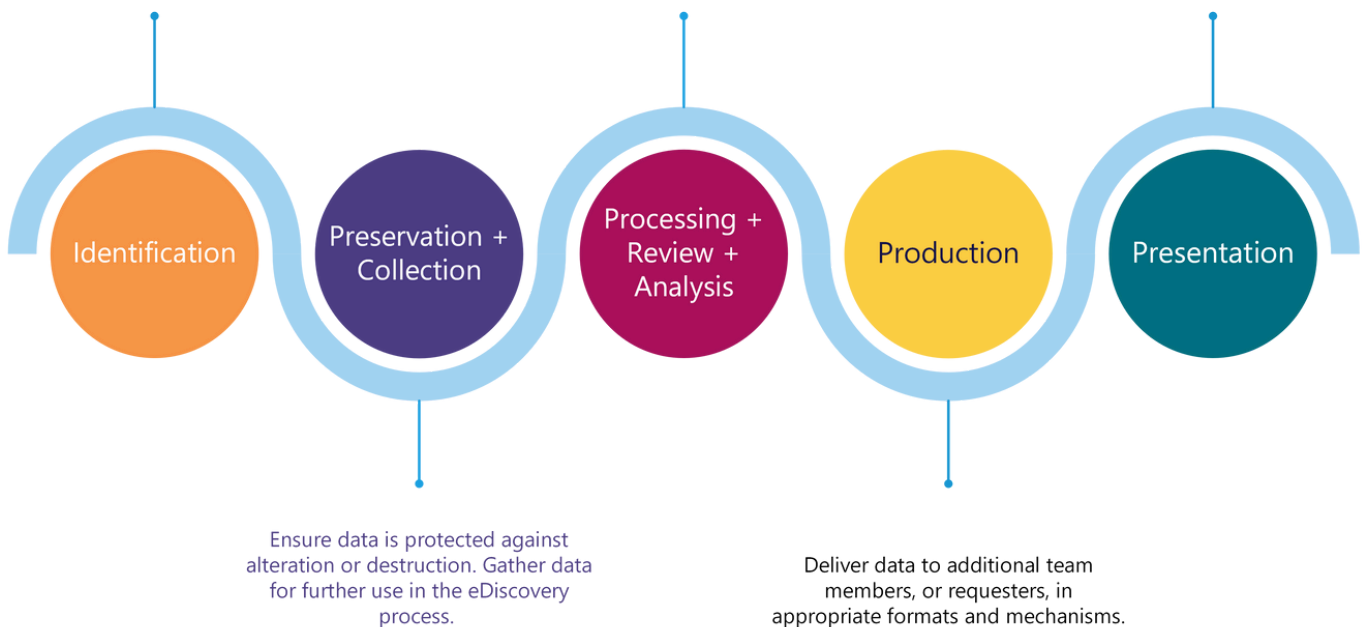
on eDiscovery

## EDRM Workflow

Locate potential data sources, determine the project scope, breadth and depth.

Convert data to reviewable formats, review privilege and permissions, evaluate data for relevance, content, and context, and analyze patterns.

Elicit further information, validate facts, or persuade an audience in a deposition, hearing, trial, etc.



# eDP247™

*eDiscovery Platform 24/7*

## Optimize eDiscovery Management

Increases in the volume of electronic data, combined with expanding information governance requirements make efficient eDiscovery management a challenge.

eDP247™ provides IT, legal, HR, compliance, and security teams with advanced eDiscovery solutions from Bluesource and Arctera.



## eDP247 Benefits at a Glance

- Quick and accurate responses to audits, legal claims, and data preservation orders
- Effective claims evaluations, without sacrificing productivity
- Legally defensible eDiscovery process that withstands court scrutiny
- Lower legal service fees: send only what you need to outside counsel, reducing data processing costs
- Support available 24/7
- Leverage best practice technology

### Full EDM Support

- Collect information from hundreds of data sources
- Easily classify content and identify relevant items

### Legal Hold Notification

- Trackable, defensible process
- Authenticated response
- Self-service legal hold responsibilities
- Survey custodians

### Analysis and Review

- Review native formats
- Full redaction capabilities to remove sensitive information

# DiscoveryAssist

## On-Demand eDiscovery experts finding what matters, fast!

Last-Minute eDiscovery requests and deadlines imposed by courts and regulatory agencies create a challenge. With DiscoveryAssist, a Bluesource eDiscovery expert is ready to assist with any phase of the EDRM.



### Benefits at a Glance

- 90-Minute SLA response time
- Workflow guidance and efficiency improvements
- Support for Microsoft and Arctera products
  - Microsoft Purview eDiscovery, Arctera eDiscovery Platform, Arctera Enterprise Vault and Discovery Accelerator, Mimecast, Proofpoint, Global Relay
- On-demand legal guidance from an attorney on retainer (extra fees)
- Available as time & materials or a per matter basis

1

#### Identification

Bluesource verifies that your systems retain the required data, and custodians can be identified for matters.

2

#### Preservation / Collection

Bluesource ensures the requested data is securely collected and preserved.

3

#### Processing, Analysis, Review

Bluesource runs and validates processing tasks, remediates errors, confirms availability of analytics, and provides review and legal guidance (via attorney on retainer).

4

#### Production / Presentation

Bluesource prepares and performs the production in the requested format.

Avoid regulatory  
consequences



# **Compliance + Governance**

# Compliance Experts On Hand

Navigating industry-specific regulations, guidance, and laws surrounding data governance is a challenge for any organization. Large-scale regulations include GDPR, the California Consumer Privacy Act (CCPA), and more than a dozen other state-level regulations.

Industry-specific data compliance mandates include: HIPAA for healthcare, the Gramm-Leach-Bliley Act and SEC Rule 17a-4 for financial institutions, FERPA for educational institutions, and the Sarbanes-Oxley Act (SOX) for any public company.



## Compliance Assessments

Don't be caught unprepared for a regulatory deadline or request. Bluesource's compliance assessments help organizations proactively address regulatory obligations by reviewing data governance policies and practices across all IT environments—including on-premises systems, cloud platforms, and shadow IT.

While these assessments do not constitute formal certification, they can help establish a clear baseline and offer strategic recommendations to support ongoing compliance and readiness for audits or regulatory inquiries.

### Assessments

#### Include

- Unstructured data
- User access
- Data health
- Classification types

# ComplianceAssist

Mitigate risk, lower expenses, and streamline operations with a Bluesource compliance expert on demand.



## Benefits at a Glance

- 120-Minute SLA response time
- Highly accredited Microsoft and Arctera resources
- We can augment your staff or run independently
- Around-the-clock monitoring and alerts
- Customized daily security and/or compliance violation report
- Quarterly deep dive review of operations with a compliance expert
- Yearly attestation letter
- Annual health check
- Monthly reporting
- Guidance on reporting

## Platforms



Arctera  
Insight Platform



Arctera  
Insight Surveillance



Arctera Enterprise Vault +  
Discovery Accelerator



Microsoft Purview



Proofpoint



globalRELAY  
Global Relay



Mimecast

# D3P Services

*Designated Third Party*

## Maintain Compliance with SEC Rule 17a-4

SEC Rule 17a-4 relates to electronic data security and states the requirement for Designated Third Party (D3P) services. D3P Services ensures that financial institutions and dealer-brokers maintain compliance with SEC policies.

### D3P Checklist



Written,  
enforceable  
retention  
policies



Searchable  
index of all data  
stored



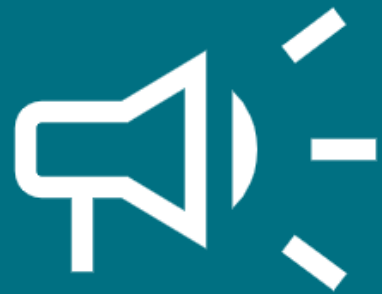
Offsite storage  
of data



Data must be  
viewable and  
readily  
retrievable

- Storage of data on WORM (Write Once Read Many) electronic media.
- Log in to each repository once every six months to keep access active. The customer must specify if logging in more frequently is necessary to maintain access.
- Draft and deliver a digital copy of the executed Letter of Undertaking (a.k.a. attestation letter). Customers may upload the letter to the Financial Industry Regulatory Authority (FINRA) Member Web Portal. A hard copy letter can be sent upon request.

*Lower the likelihood of disgorgement or repayment, suspension, and civil monetary fines from a failure to adhere to SEC rules and regulations.*



# Bluesource Basics



## Our Partners



carahsoft.



**mimecast**



**Kiteworks**



**proofpoint**

## ISO 27001

### Meeting Global Standards

ISO 27001 sets the international framework for establishing, implementing, maintaining, and continually improving Information Security Management Systems.

Bluesource is ISO/IEC 27001:2017 certified under IT managed services, migration services, cloud enablement and consulting services for businesses globally.



# Microsoft + Bluesource

## Quick Services Guide



	M365	Exchange	Purview	Azure
E3/E5 eDiscovery	●		●	
Maintain Continuity for moving to the cloud	●			●
Configuring Compliance + Retention		●	●	
Building Environments				●
Implementation	●		●	●
Teams Consulting + Enablement	●			
Discovery Assist	●	●	●	
Readiness Assessments	●		●	●
Ensuring Optimal Use of Storage + Computing	●	●		●
Develop eDiscovery Workflows			●	

### Plus the following across all platforms

- Data Migration
- Consulting
- Training
- Configuration
- Solution Design
- System Integration
- Developing a Transition Plan



# Arctera + Bluesource

## Quick Services Guide



**Enterprise Vault**



**Insight Platform**



**eDiscovery**



**Merge1**

	Enterprise Vault	Insight Platform	eDiscovery	Merge1
EV247	●		●	
Health Checks	●		●	●
Upgrades	●		●	●
Data Migration	●	●	●	
Technical Support Partner Program	●			●
GDPR	●	●		
General Consulting + Custom Services	●	●		
eDP247 + eDP247 Cloud Companion			●	●
FedRAMP Authorized	●		●	●

### Plus the following across all platforms

- Technical Phone Support
- Implementation
- Discovery Assist
- Training
- Managed Services
- Remediation



# Legacy Data Archiving With Cloudlocker



Introducing Cloudlocker, a low-cost legacy email storage solution. Cloudlocker safeguards legacy email and data archives for retention and compliance purposes.

## Key Features

### Store

Quick and defensible data migration from just about any legacy archiving or email platform.

### Search

Industry leading platform with a scaled approach to content indexing, advanced searches, and custom search capabilities.

### Export

Integrated export with RelativityOne and Microsoft Purview, or export data in an open format for other programs.

## Security

Cloudlocker is built with Microsoft Azure's multilayered, built-in security features and controls. Your data is always secured, at rest and in transit. Our team is subject to extensive background checks and regular security training to ensure we are up-to-date on best practices. Plus, Cloudlocker is ISO/IEC 27001:2017 certified.

## eDiscovery and Compliance

Maintain regulatory compliance and simplify eDiscovery. Define custom retention and expiry policies, assign data to a matter, and place items on a legal hold. A Cloudlocker subscription can include Bluesource's fully managed eDiscovery services as an add-on.

# Fully Managed Data Storage



## Low Cost

- Simple, volume-based pricing structure
- Yearly subscription cost
- No hidden fees
- Additional users at no extra cost

## Easy of Use

- 30-minute screenshare on-boarding
- Simple user interface
- Web-based application
- Direct exports to Microsoft Purview or RelativityOne

## Scalable

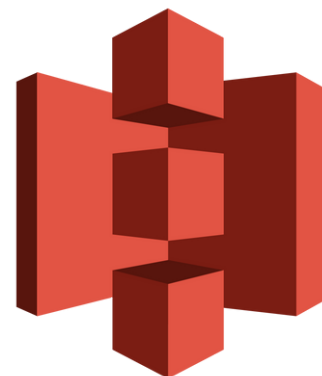
- Grow with your business
- Keep data for as long as you like, or set retention & expiry
- Eliminate excessive maintenance costs

## Defensible

- Direct exports to Microsoft Purview or RelativityOne
- Full audit trail and chain-of-custody reporting

## S3 Local Storage Option

Cloud data archiving does not need to be 100% in the cloud. Maintain control over your data with CloudLocker's S3 storage option. Host 100% of your archived data on your own terms: in an on-prem data center or with any platform that supports S3 protocol. The only data held within CloudLocker is the metadata used for indexing and deep search. With no data lock, you'll maintain complete control of your data.



# Get Started with Bluesource



## Sales

(845) 987-4645

Sales@Bluesource.net

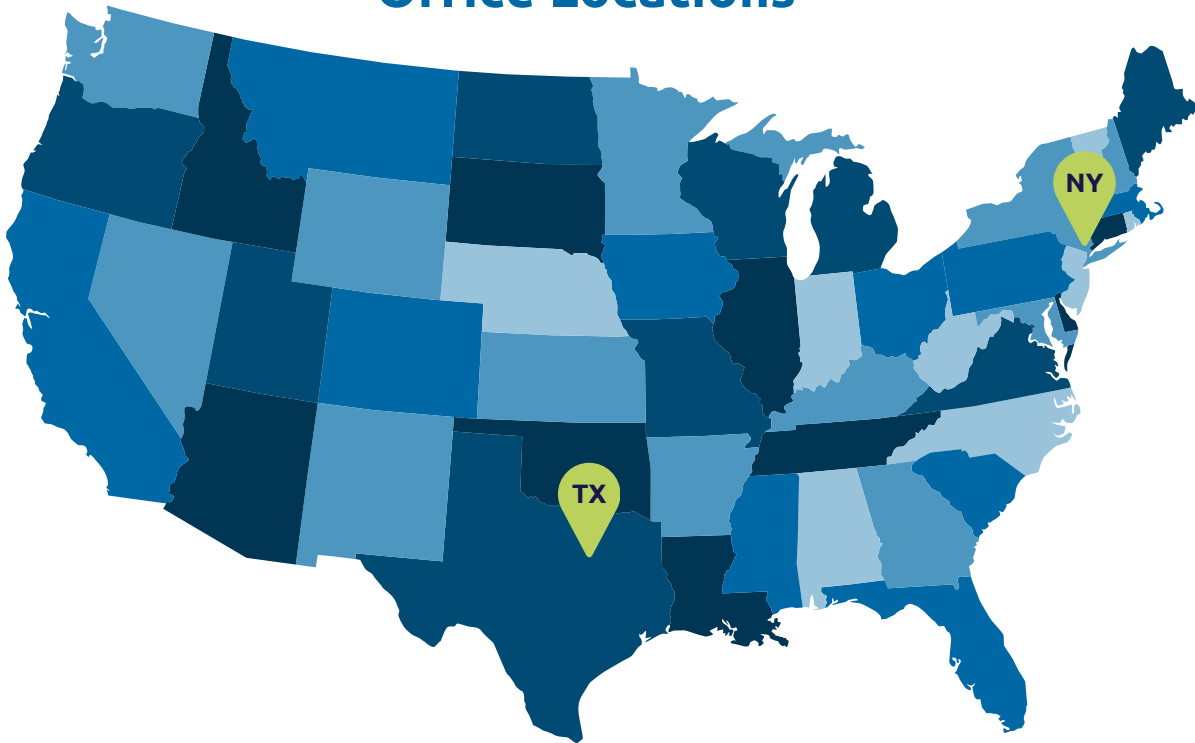


## Support

(817) 601-0710

SMCSupport@Bluesource.net

## Office Locations



**Connect on LinkedIn**

[LinkedIn.com/showcase/bluesource-na](https://www.linkedin.com/showcase/bluesource-na)

