



## Archiving

Automatically preserve, protect, and retrieve your critical business communications

Archiving of  
chats, SMS, phone  
calls and meetings

Powerful  
contextual  
item-level  
search

Retention  
policies  
automatically  
enforced

Simple to  
deploy and  
manage

Support for  
compliance with  
FINRA, SEC,  
HIPAA, and other  
regulations

As organizations expand their use of chat, SMS, calls, meetings and other communications capabilities, more and more business-critical and sensitive information is shared using these channels. To make this information easy to find whenever it's needed, it's critical to safeguard these interactions from accidental or inappropriate deletion. A secure, searchable archive then allows users to quickly identify and retrieve relevant conversations and ensure compliance with internal governance and regulatory retention requirements.

Tightly integrated with Elevate, this archiving solution automatically preserves chats, SMS, phone calls, voicemails, meetings and more without requiring any user or administrative action. It's fast and easy to deploy and provides a powerful contextual search capability of retained communications based on a view of all users across different channels.

## ARCHIVING OVERVIEW



### ARCHIVING CAPABILITIES:

- **Seamless integration with Elevate:** Designed for Elevate and deploys in minutes with everything needed to enable compliant retention for Elevate communications.
- **Automatic preservation of Elevate communications:** Captures and retains chat and SMS messages, call records, phone call recordings, voicemails and meetings.
- **Security:** Data is uploaded securely and encrypted in transit and at-rest with multi-factor authentication to protect access and limit export to authorized users.
- **Identity and access management:** Ensures control over authorized personnel who can access and manage archived communications
- **Retention:** Choose to store data for as long as the business case requires – with retention options ranging up to ten years.
- **Unlimited capacity\*:** Administrators are not forced to estimate the level of activity for their organization or project storage requirements – administrators simply enable the archive and select the desired retention period.
- **Fast, powerful contextual search:** Indexes both content and metadata, so millions of files can be queried using dozens of properties in seconds. Search on text, chat names, participants, call duration, source, attachments, and many more attributes.
- **Compliance:** Supports HIPAA, FINRA and MiFID II compliance programs, with optional WORM tamper-proof media storage to comply with SEC Rule 17a-4. Audit logs report all actions carried out by users including who viewed what, user activities, sessions and more.
- **eDiscovery and litigation support:** Apply legal hold to override retention periods and ensure data is retained to support legal case workflow and export of all case documents.
- **Data residency:** Supports US, Canadian and European locations.

\*Subject to the Fair Use limitations set forth in the Archiving Product Schedule available at: <https://www.serverdata.net/legal>

# WHY BUSINESSES NEED ARCHIVING:



## COMPLIANCE

Proactively retain and monitor business communications and interactions in an automatically preserved, secure and tamper-proof archive. Retention options support financial services and healthcare regulatory requirements, as well as internal governance.



## FINDING CRITICAL COMMUNICATIONS

Instructions, proposals, recommendations, agreements and contracts are all examples of important information included in and referenced by internal and external business interactions. Archiving allows users to keep a record of communications sent and received, which helps ensure they have a copy of messages and associated documents stored safely without requiring users or administrators to save them. In addition, powerful contextual search helps locate and retrieve messages and documents quickly.

# ARCHIVING SEARCH FEATURES

Keyword Search

Search Filters

Content Metadata

Content Summary

Select Items

Monitored Users

Timestamp

Additional Properties

Content Preview

Search

Keywords

Date

Type

Participants

Direction

Duration

Clear all

Title	Participants	Date	Properties
<input type="checkbox"/> Random Hey team, I was wondering, which is better, the ...	+64	07/26/2023 5:43 PM	10 71
<input type="checkbox"/> Marketing Have been playing with some of the images out ...		06/01/2023 6:43 PM	9 6
<input type="checkbox"/> Marketing Printer is out of ink again! Anyone got another o...		05/31/2023 6:43 PM	3 6
<input type="checkbox"/> Direct Chat   Burt Allen, Lyon Carpaccio Here you go		05/29/2023 7:18 PM	2 2
<input type="checkbox"/> Marketing How far are we with the proposal today? Would ...		05/29/2023 6:43 PM	4 6
<input type="checkbox"/> v1.pdf 1 Development & marketing plan TOY ELEPHA...		05/29/2023 5:43 PM	
<input type="checkbox"/> vega-dinner-menu.pdf		04/29/2023 5:43 PM	
<input type="checkbox"/> Internal votes and such Hey guys - wanted to get a quick survey done W...	+64	10/14/2022 11:19 AM	7 71
<input checked="" type="checkbox"/> European Marketing Team hello! did anyone see the earnings call notes fro...	+64	08/25/2022 12:32 PM	8 71
<input type="checkbox"/> Phone Call   Burt Allen, Martha Svinyard		06/06/2022 2:47 PM	2m 10s

11 documents 1 2

European Marketin... Public 08/25/2022 12:32 PM

Participants: Anton Abe Cecil Alfred Burt Allen Willey Amos Adriana Aronovsky Lester Bernard Alfred Bruce Jessie Burt Lyon Carpaccio Franklin Cecil Simon Charley Sharon Clerk Peter Croissant Fred Cyrus

Anton Abe 12:32:01 PM hello!

Anton Abe 12:32:02 PM did anyone see the earnings call notes from our competitor yesterday?

Cecil Alfred 12:32:04 PM hi!

Cecil Alfred 12:32:04 PM

Cecil Alfred 12:32:05 PM Yes - it was interesting to see what effect the market has had on our competitor, as it will probably have a similar effect on us (all other things being equal).

Willey Amos 12:32:05 PM Yes it is true that by being in the same industry as our competitor, that we will face the same market advantages and disadvantages that our competitor



### CONTINUITY

Staff turnover, medical/family/military leave, and organizational changes all create situations where digital conversations need to be preserved and searchable to support transitions. Archiving solution protects communications for all users, making it simple for an administrator to manage transitions of responsibility and make information available to the right users.



### DISPUTES AND BEST PRACTICES

Review and resolve “who said what” disputes quickly and efficiently (e.g., HR or customer disputes). Monitor call quality and staff performance to improve company standards and customer care. Train staff on call handling techniques and customer interactions to improve performance. Rescue defecting customers.



### PEACE OF MIND

Automatic, secure, tamper-proof preservation of communications protects organizations when unexpected challenges arise. Businesses using Elevate's integrated archiving solution can take comfort in knowing that their data will be available if and when they need it.

**QUESTIONS? CONTACT US TODAY!**

BSB Communications

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