



Information Infrastructure Foundation: Managing Content Growth

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Information Management software



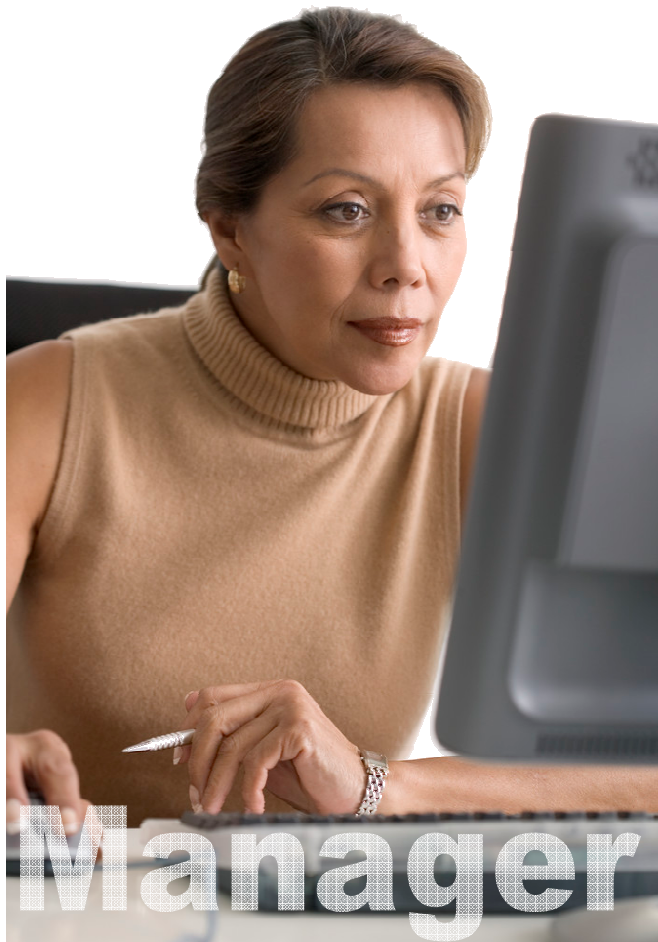
Agenda

Growing volume and variety of Content

- Archiving vs. Content Collection (and Archiving)
- Content Collection and Archiving with an ECM Platform
- IBM's Content Collector Family of Offerings
- Summary



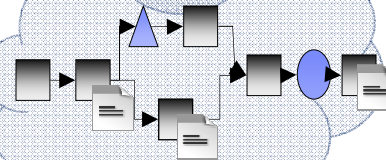
We all deal with volume and variety of data and content



Paper is still an important source of documentation. *Can you easily access the right files?*



Electronic content must be controlled. *Can you find the right version?*



Business processes are built around unstructured information. *Do you have the right information in context?*



Decisions are not made in a void. *Can you effectively work with colleagues both inside and outside the business?*

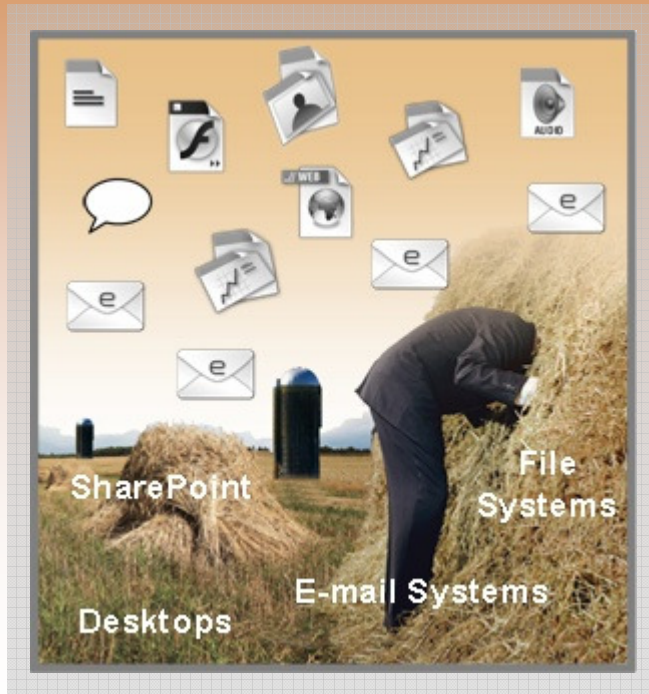


Regulatory and legal requirements are increasing. *Are you consistently enforcing corporate policies without over burdening the worker?*

The Problem Will Continue to Get Worse ...

Content Explosion Continues

Large growing piles of unmanaged and unsearchable content



SharePoint

File Systems

Desktops

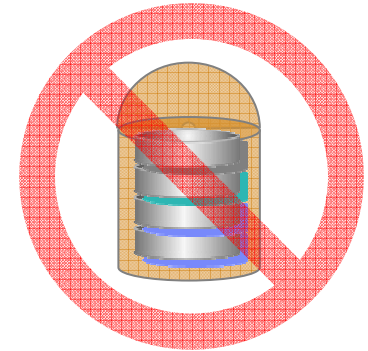
E-mail Systems

Current Archiving Approaches Do Not Meet All of Today's Needs

Existing point solution deployments that can't be expanded, or are too costly, or have failed to meet all of today's needs

- Can't add or support new content types or environments
- Limited simplistic functionality that does not scale
- Does not meet new eDiscovery or records management requirements
- Line-of-business expects more than just archiving
- Propagates costly "keep everything" models

Stop just archiving. Start using your information.



1

More than e-mail

Monitor, identify, and **collect** virtually all content types from all locations including casually created content and existing “archive” silo systems

2

More than archiving

Enhance by tasking, filtering, transforming, extracting meta data, customizing and more, including multiple classification options

3

More than an isolated solution

Manage content as part of ECM platform (not a silo) and information infrastructure to unlock value while leveraging existing investments

It's No Longer Good Enough to Just Archive

Archive e-mail and content for storage space management

To reduce operational problems introduced by the growing size of e-mail and other content sources

IT
Storage / Mail

Manage e-mail and content for legal obligations

To comply with new eDiscovery requirements and produce authentic and trustworthy records when required

LOB
Legal / Records

Connect e-mail and disconnected content to other managed content

To control, protect and leverage e-mail and casually created content

IT
ECM

Manage e-mail and content as part of a business process

To optimize business processes involving e-mail and other content

LOB

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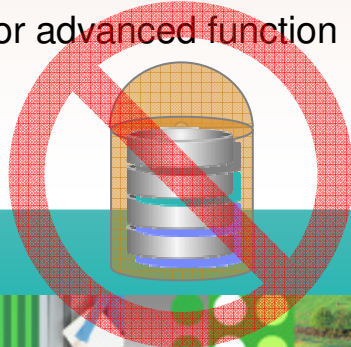


What is Content Collection and Archiving?

E-mail Archiving

The process of archiving e-mail content to improve storage / mail server efficiencies

- **Limited business value:**
Reduce operational problems introduced by the growing volume/size of e-mail and other content stores
- **Value limitations due to:**
 - Limited usage & functionality
 - Creates information silos
- **High total cost of ownership**
 - Fixed cost per silo, repeated for each silo
 - Each silo may require additional custom integration costs for advanced function
- **Siloed decision**

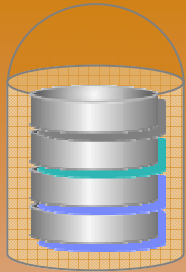


Content Collection and Archiving

The process of collecting, enhancing and managing virtually all types of content, regardless of creation type and storage mechanism

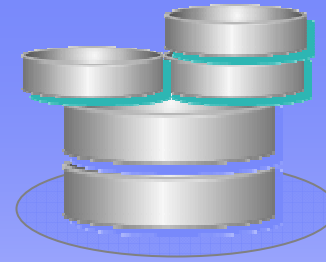
- **Expanded business value**
Enable organizations to take back control and unlock business value of content, while enforcing compliance and operational policies, all with lowest total cost
- **Limitations removed with:**
 - Advanced usage & functionality
 - No information silos
- **Reduced total cost of ownership**
 - Variable costs leveraged across a common infrastructure
 - Advanced function already pre-integrated
- **Strategic decision**

The ROI of a Common Platform Approach



Stepped
Traditional cost model

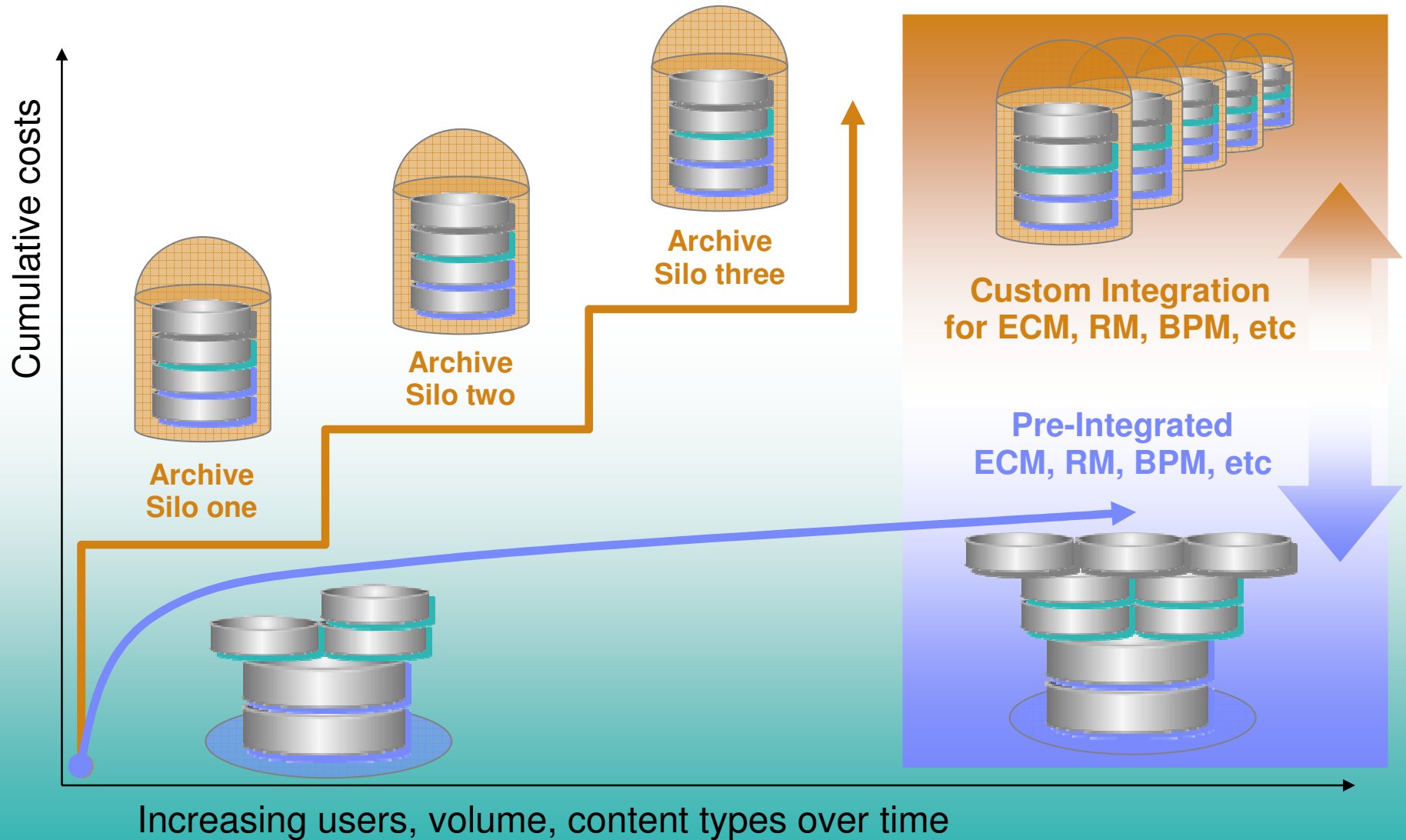
- Repeated fixed cost to deploy each system - also creates disconnected silos
- Requires administration (rules, holds, etc) from each location (x number of systems)
- Each silo also incurs its own custom integration costs to enable advanced functionality (RM, BPM, eDiscovery, etc)



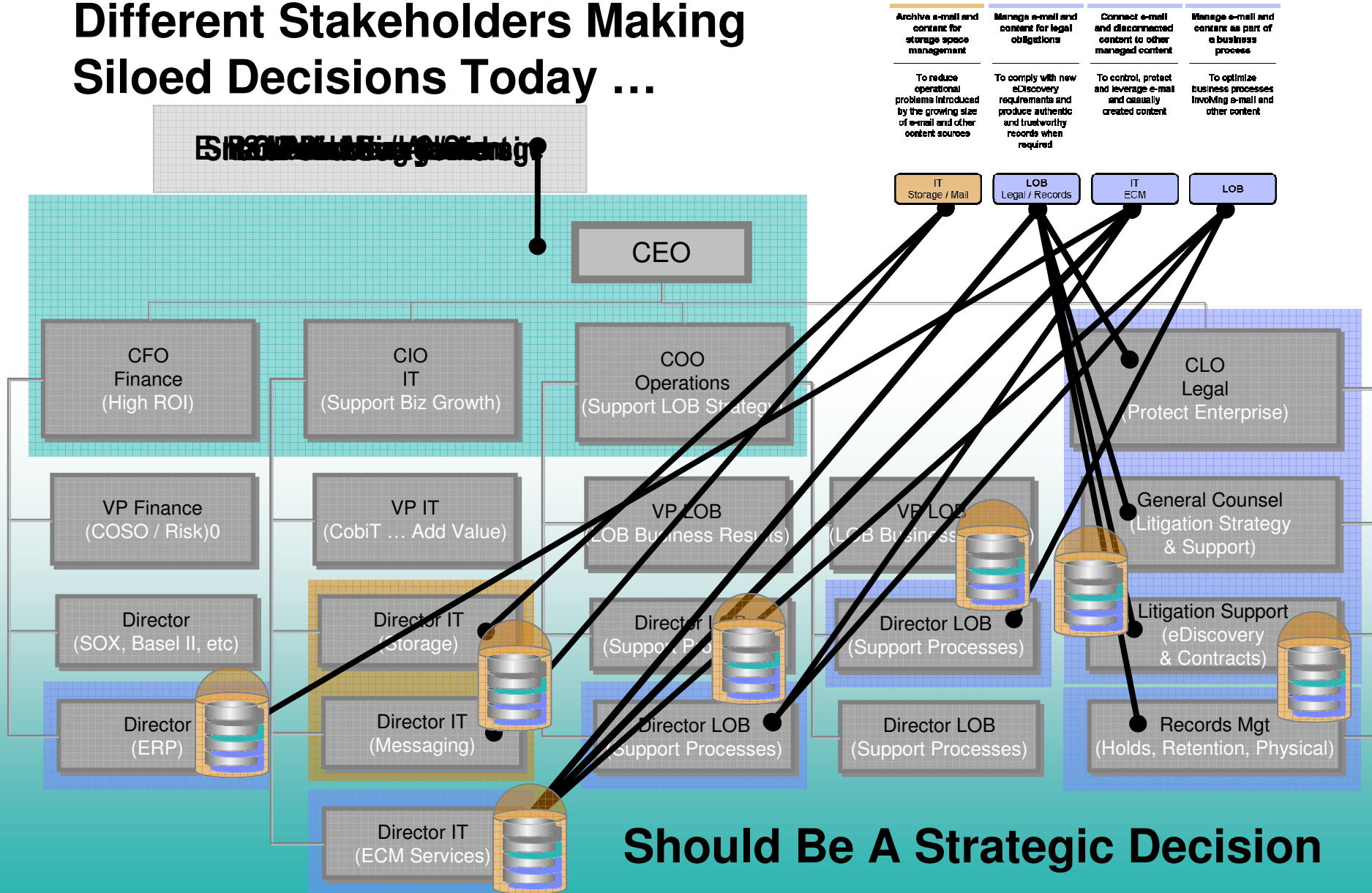
Modular
ECM add-on leveraged model

- Incremental deployment and ongoing admin costs leveraged across ECM platform / repository
- Single point of administration for policies
- Advanced functionality integrated out-of-the-box

The ROI of a Common Platform Approach



Different Stakeholders Making Siloed Decisions Today ...



<p>Archive e-mail and content for storage space management</p> <p>To reduce operational problems introduced by the growing size of e-mail and other content sources</p>	<p>Manage e-mail and content for legal obligations</p> <p>To comply with new eDiscovery requirements and produce authentic and trustworthy records when required</p>	<p>Connect e-mail and disconnected content to other managed content</p> <p>To control, protect and leverage e-mail and causally created content</p>	<p>Manage e-mail and content as part of a business process</p> <p>To optimize business processes involving e-mail and other content</p>
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Should Be A Strategic Decision

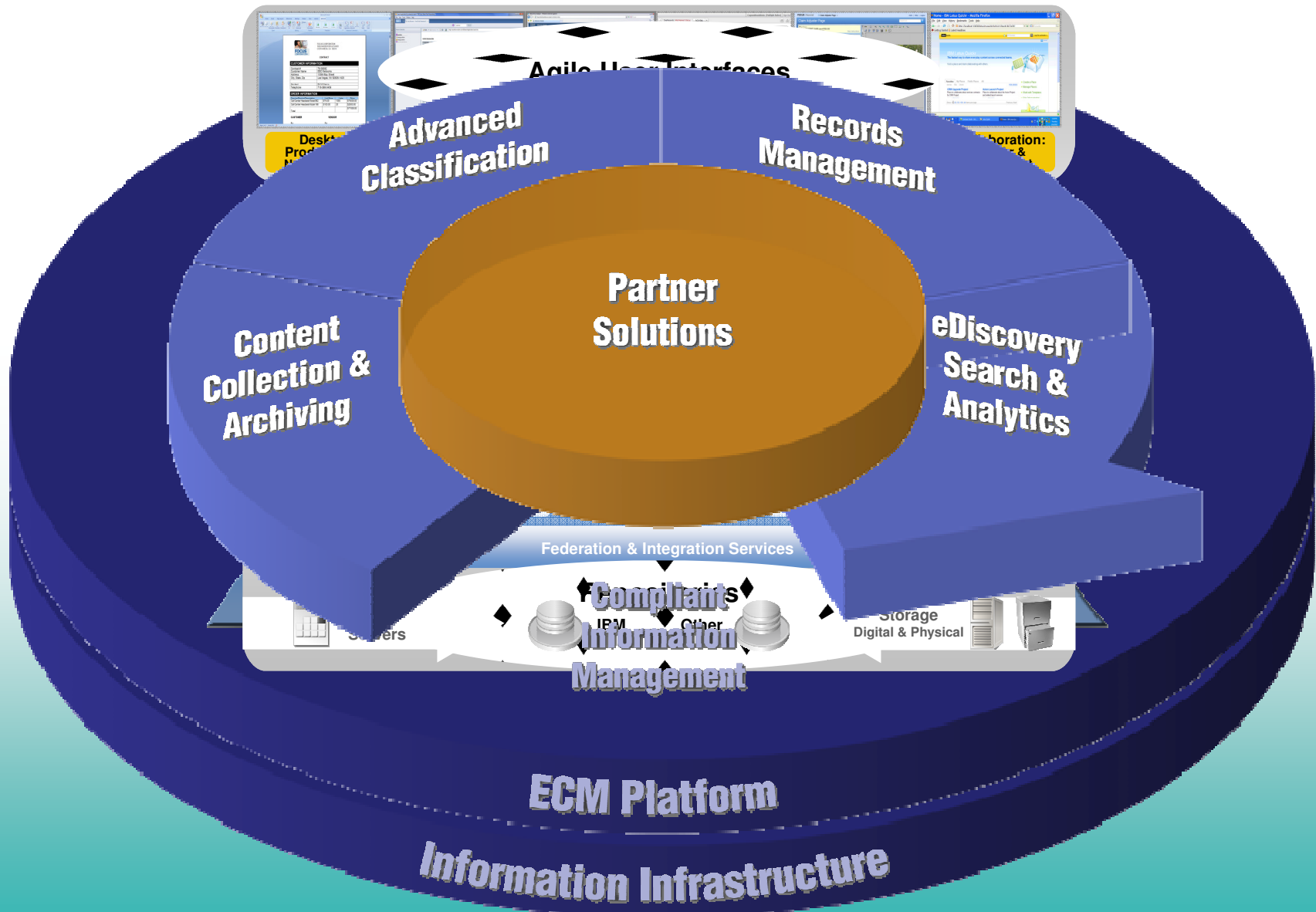
Agenda

- Growing volume and variety of Content
- Isolated Archiving vs Content Collection (and Archiving)

Content Collection and Archiving with an ECM Platform

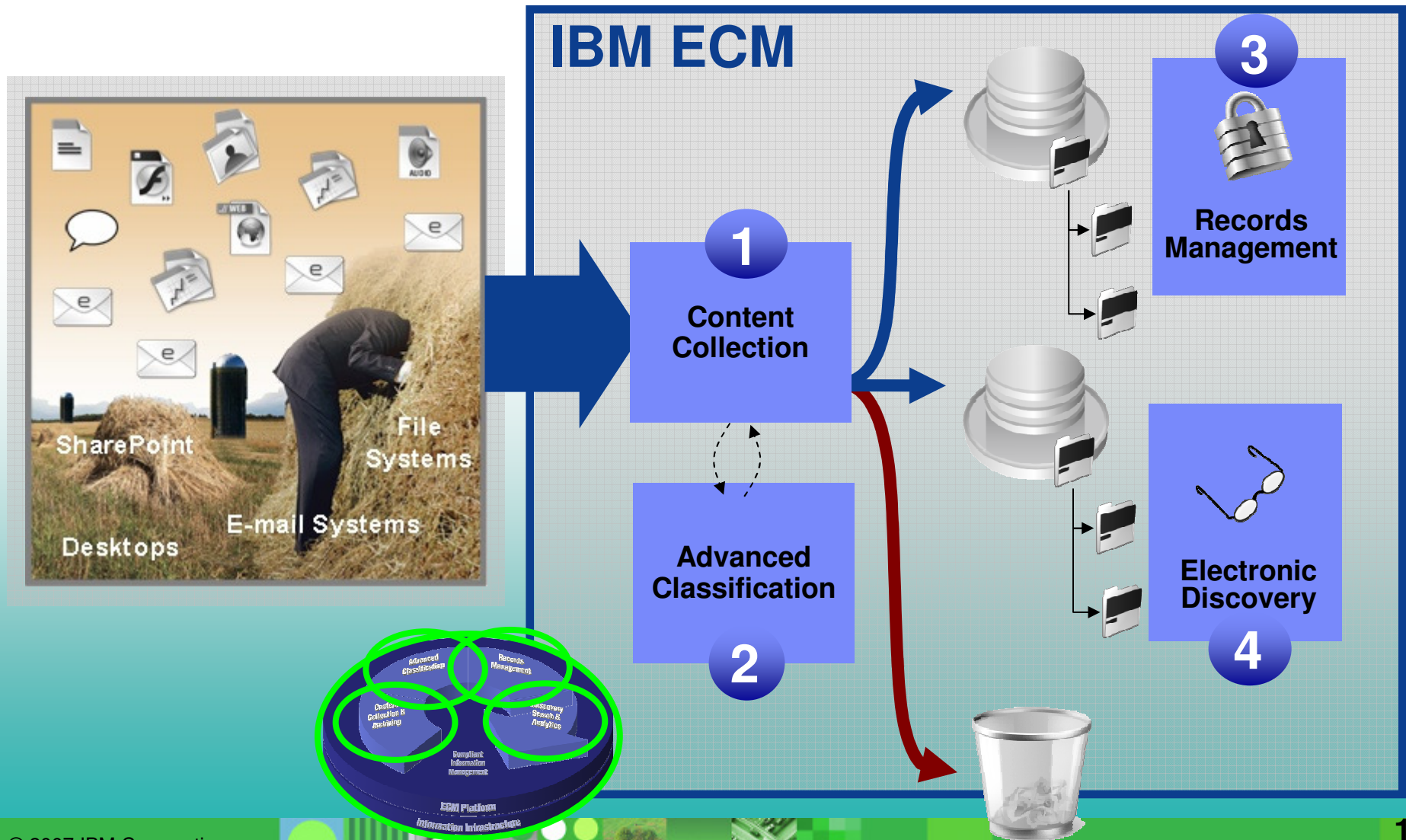
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Enterprise Compliance Vision

Integrated Agile ECM Platform for Compliant Information Management



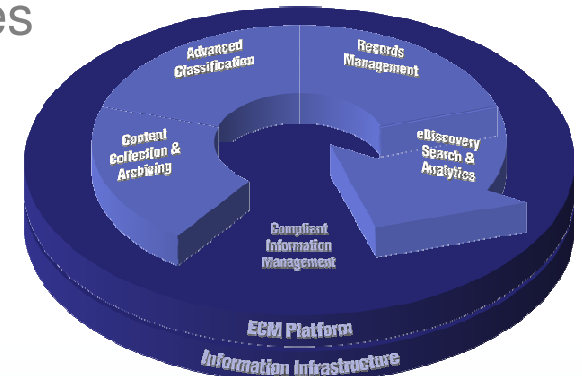
Powered by *ZeroClick* Policy Enforcement

Automates complex repetitive decisions and eliminates end-user burden and mistakes to ensure 100% participation



Identify → Decide → Act → Enforce

Innovative technology that uniquely uses process, events, rules, metadata and advanced classification to invisibly enforce policy throughout the entire compliant information lifecycle



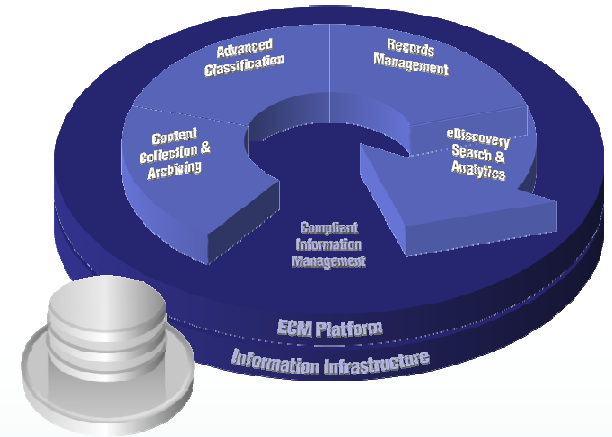
- Uses process and system / user events to programmatically identify and invoke action on information from business users and systems ... content and records are programmatically collected or managed in place
- Uses rules, metadata, process data and advanced classification technologies to automatically classify and match policies to content ... supports semi-automated category suggestion when required
- Automates the records and information lifecycle by using events to trigger retention and automating key lifecycle processes such as legal hold, storage migration, destruction and disposition including approvals
- Policies are consistently enforced at the technology layer, not randomly by business users or administrators

Significantly reduces organizational risk, helps ensure consistency, lowers costs and improves productivity



Much More Than a “Vault” or “Safe” ...

- Protects critical content ... not just an index
- Based on proven, scalable, secure content repositories
- Provides controlled access as governed by policies, roles and the associated lifecycle
- Complete audit log of users and all related content and process activities
- “Active Content” and internal / external event support with real-time activity monitoring
- Extensible via open, industry proven APIs



Step	Participant	Received	Response
Launch Step	Administrator	Mar 13, 2003 5:02:42 PM	✓
Prepare Cust.	[HostQuery] Administrator	Mar 13, 2003 5:02:42 PM	✓
Setup Approval	[SalesAdmin] chillier	Mar 13, 2003 5:04:18 PM	✓
Verify Docs	[Verification] chillier	Mar 13, 2003 5:07:34 PM	✓
Reset Doc Gen.	[Correspondence] Administrator	Mar 13, 2003 5:09:54 PM	✓
Wait for Return	[Pending] Administrator	Mar 13, 2003 5:09:54 PM	✓
Host Update	[In progress]	Mar 14, 2003 5:12:14 PM	In progress

- Preserves legal chain of custody
- Leverage for SOX and other regulatory compliance
- Leverage for BI and performance management

Content Collection is Enhanced with Content Federation

Content Collection ... collecting, enhancing and managing all types of content, regardless of creation type and storage location

- Generally for content sources that are not scalable, lack security, proper controls or do not support lockdown

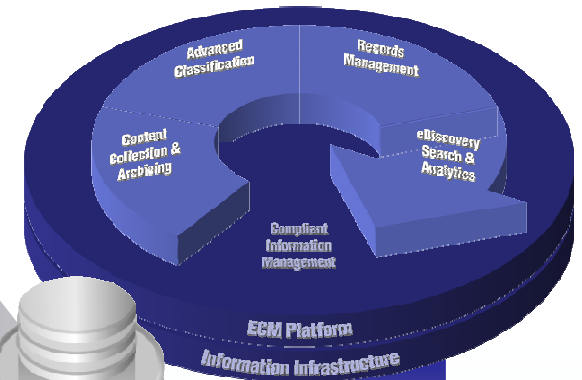
Content Federation ... managing e-mail and content in place through federated control and remote policy management

- For content sources that are well suited for federated control ... typically ECM repositories

Both approaches may be required for environments with multiple content sources and types

Content Collection

File Systems, SharePoint, Desktop, E-mail Archives, Messaging Systems ...



Content Federation

Manage In Place
Remote Policy Override



IBM & Non-IBM ECM
Repositories

Reports, Images, etc

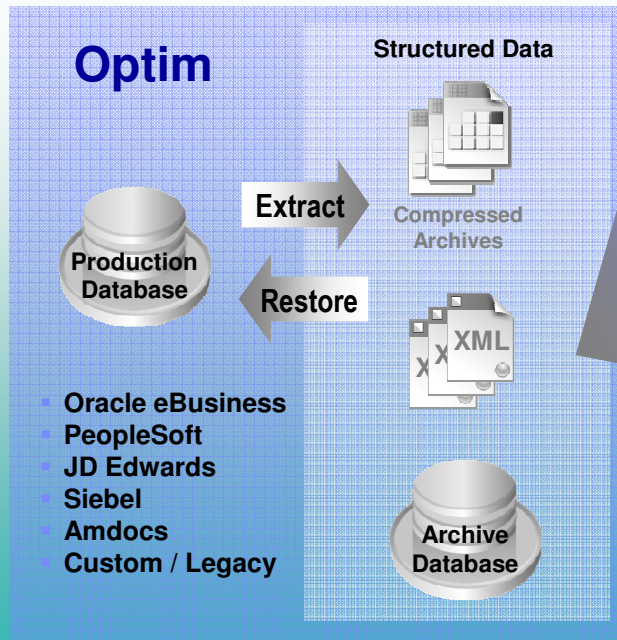
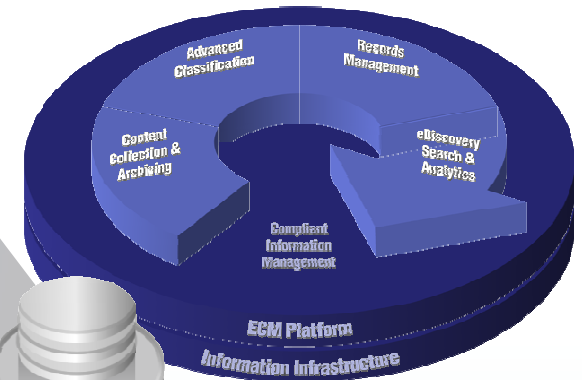
Only IBM has proven ability to offer both approaches

Content Collection is Extended with Paper Capture, Data and Application Archiving

Scanned Images



Paper Conversion



Application & Data Archiving

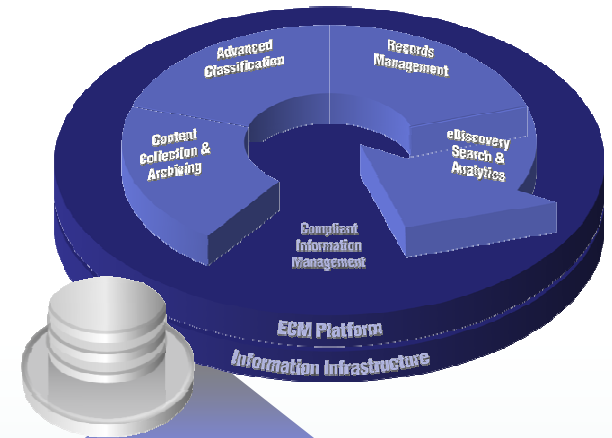
SAP Archiving

SAP Information



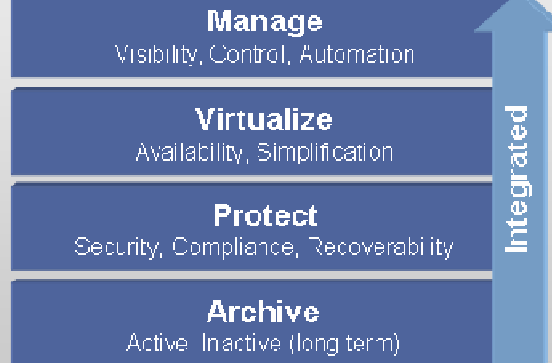
Further Mitigate Information Risk With the Right Integrated Storage Solution

- Support for IBM Information Infrastructure Solutions
- Support for virtually any standard disk subsystem
- Advanced support for protected storage if mandated by regulatory body
- Integrated HSM and licensed storage connectors support all environments and vendors



IBM Tivoli Storage Manager
IBM FileNet Storage Connectors

IBM Information Infrastructure



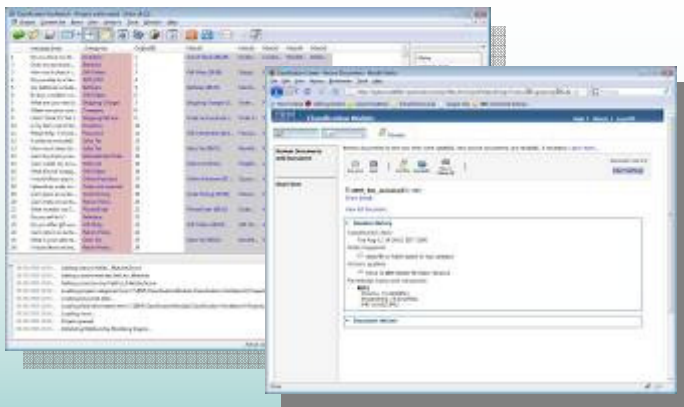
Best Practices and Services

- Information Security**
84% of security breaches come from internal sources
- Information Retention**
Legal discovery costs exploding
- Information Availability**
Downtime costs can amount up to 16% of revenue
- Information Compliance**
63% IT executives rate compliance as a top challenge



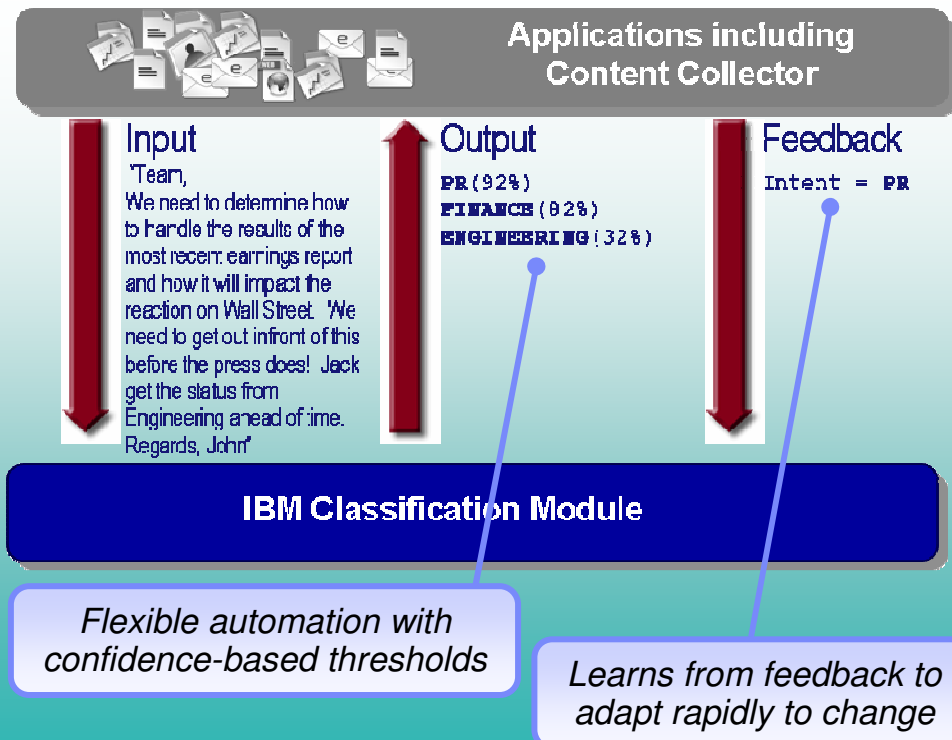
Advanced Classification

Blast away barriers to adoption, accelerate deployment, and manage information consistently and proactively for compliance by replacing manual decisions with automated classification and eliminating rules setup and maintenance



IBM Classification Module

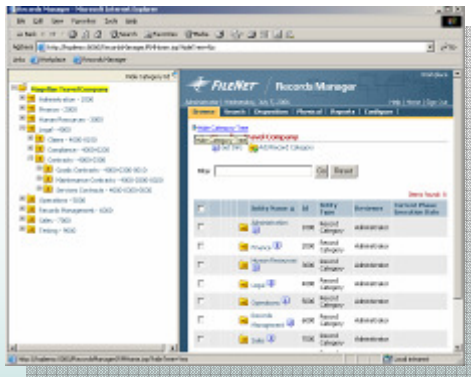
- Sophisticated context-based classification
- Adapts automatically to learn your organization's policies and proposes new taxonomies
- Integrated with Content Collector, Records Manager and FileNet P8
- Provides suggestions for semi-automated "assisted classification"





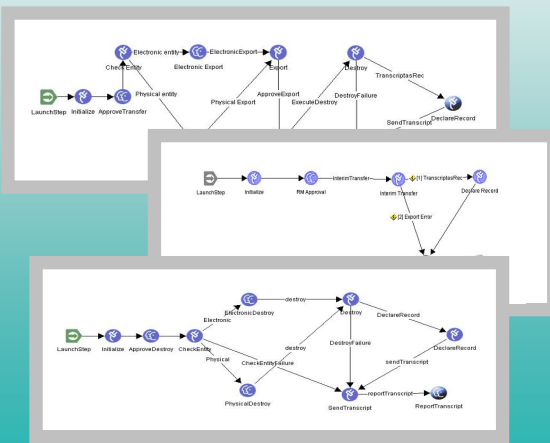
Records Management & Federation

New federation and advanced classification capabilities take records and retention management to the next level



IBM FileNet Records Manager

- Simplified records administration interface to manage all aspects of the electronic and physical records lifecycle
 - ▲ Advanced file plan, classification and metadata management
 - ▲ Complex lifecycle event and records process management including intelligent retention and disposition management
 - ▲ Patent-pending dynamic legal hold capability
 - ▲ Best practice process templates pre-integrated with RM lifecycle
 - ▲ Physical records support with real-time records process tracking



- DoD 5015.2 v3 certified offering

Records Federation Services

- Support for all IBM ECM repositories
- Support for non-IBM repositories

IBM Records Manager (engine) available for zOS, CM8 or embedded applications



eDiscovery Search & Analytics

Efficient Litigation Response Enabled by Proactive Management

Increase agility, improve defensibility and lower cost of eDiscovery response with targeted integrated tools to collect, hold, manage, assess and intelligently cull collected electronic information regardless of originating source



IBM eDiscovery Manager

- Tool for authorized IT users to help respond to discovery requests from legal
- Create and manage cases; search, assign, hold, preview, and export collected content
- Built on and integrated with ECM platform with full auditability for chain-of-custody



IBM eDiscovery Analyzer

- Early case assessment and smart culling for legal professionals and litigation support specialists
- Smart refinement of case collections to help dramatically reduce eDiscovery costs
- Advanced conceptual search and content analytics for rapid case insight



Agenda

- Growing volume and variety of Content
- Isolated Archiving vs Content Collection (and Archiving)
- Content Collection and Archiving with an ECM Platform

IBM's Content Collector Family of Offerings

- Summary



What is IBM Announcing?

A family of Content Collection and Archiving offerings and partner solutions based on a modular, extensible architecture that enables organizations to take back control and unlock business value of content, while enforcing compliance and operational policies, all with lowest total cost of ownership

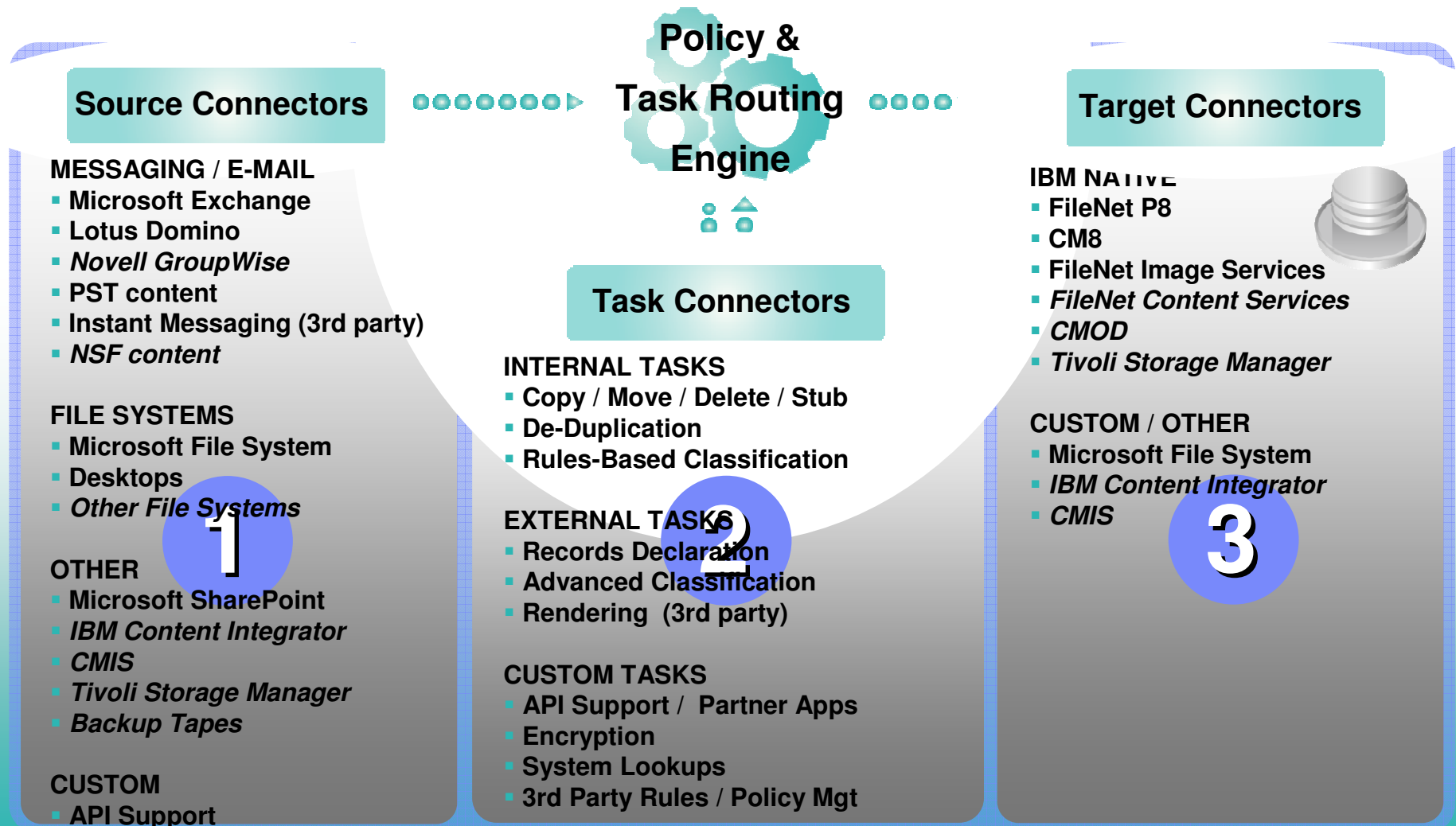
New offerings being announced:

- IBM Content Collector for Email
- IBM Content Collector for File Systems
- Expanded partner solutions and ecosystem



IBM Content Collection and Archiving Architecture

Modular and Extensible ... Powered By New Task Routing



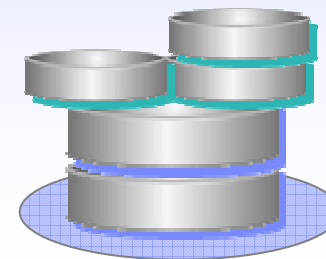
Comparing Solution Approaches

Competitive “Archiving” Only Approaches

- Simplistic solution with fixed archive storage
- Closed system with no ability to easily extract information
- Well suited for archiving only

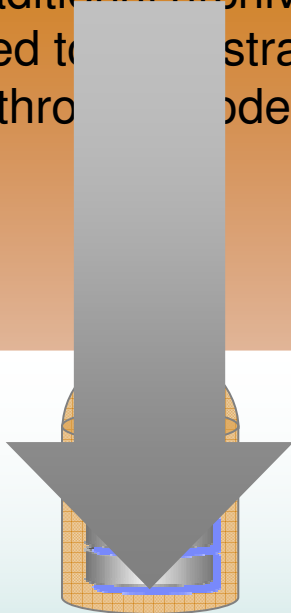
IBM “Content Collection and Archiving” Offerings

- Modular and flexible system with choice of ECM repository
- Open ECM environment enables use of information
- Suited for multiple content collection and archiving applications



Task Routing Engine Supports More Than Archiving

Traditional archiving
limited to straight-
through model



Content Collector Task Routing Architecture enables
flexible routing and configuration for processing of
internal and external instructions (or tasks)

Task Connectors

INTERNAL TASKS

- Copy / Move / Delete / Stub
- De-Duplication
- Rules-Based Classification

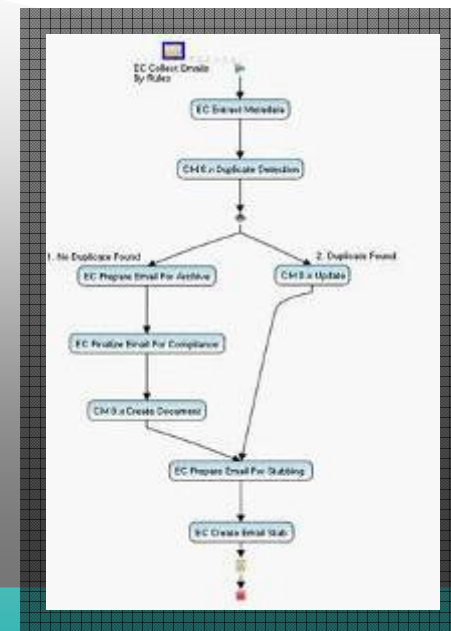
EXTERNAL TASKS

- Records Declaration
- Advanced Classification
- Rendering (3rd party)

CUSTOM TASKS

- API Support / Partner Apps
- Encryption
- System Lookups
- 3rd Party Rules / Policy Mgt

Task Routing



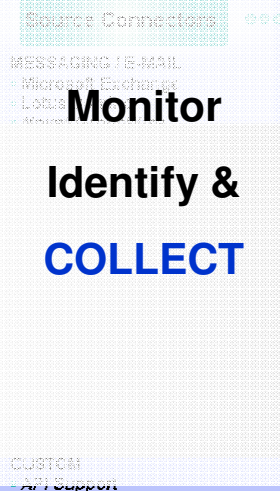
IBM Content Collector Family

How it Works

- Archive for Storage or Mailbox Mgt
- Collect for eDiscovery
- Capture / Declare as Records
- Reconnect Disconnected Content
- Manage as Part of Business Process

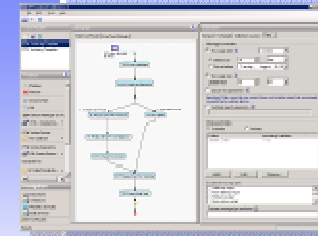


Monitor
Identify &
COLLECT



Policy Management UI

- Manage Policies / Rules for **Sources, Tasks and Targets** (including basic classification)
- Configure **Task Routing** including 3rd Party Applications



Choice of Repository



CM8 Repository & HSM

- Repository & Integrated TSM
- Search & Retrieval
- eDiscovery Search & Analytics
- Records Management



Classify
Task &
ENHANCE

MANAGE
within ECM
Platform

Activate Content Image Services

ACTIVATE CONTENT

Trigger Processes



IBM Classification Module

- Leverage **Task Routing** for Advanced Classification

- Coexistence with Archive Silos
- Control Unsecure Content Locations

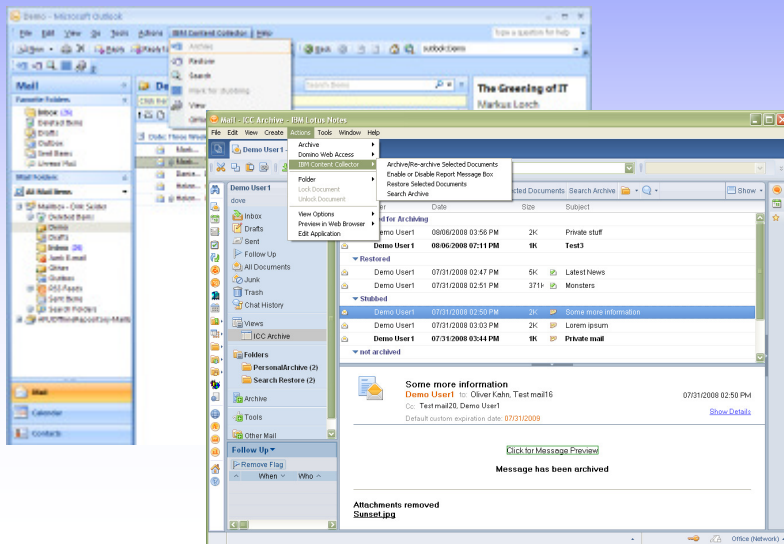
IBM Content Collector for Email V2.1

A Content Collection & Archiving offering that collects, enhances and manages Lotus Notes or Microsoft Exchange e-mail

Key Features

Enables eDiscovery, Records Management, and/or Business Process Management of e-mail, together with other forms of content via use of a common ECM infrastructure.

- Powered by *ZeroClick* policy enforcement



Reduces storage requirements and increases operational efficiency of e-mail servers with mailbox lifecycle management tools including stubbing and de-duplication

- Rich end user capability including previewing of archived email, opening from stubs, restoring to inbox, restubbing, searching, and support for Outlook Web Access, iNotes and web browser access
- Offline user support provides end users with access to their archived e-mail even when not connected to the repository
- Simplified and flexible configuration and administration
- Automated, policy driven (ZeroClick) collection & archiving of e-mail; Journaling and manual options also available
- Support for CM8 or FileNet P8 repositories

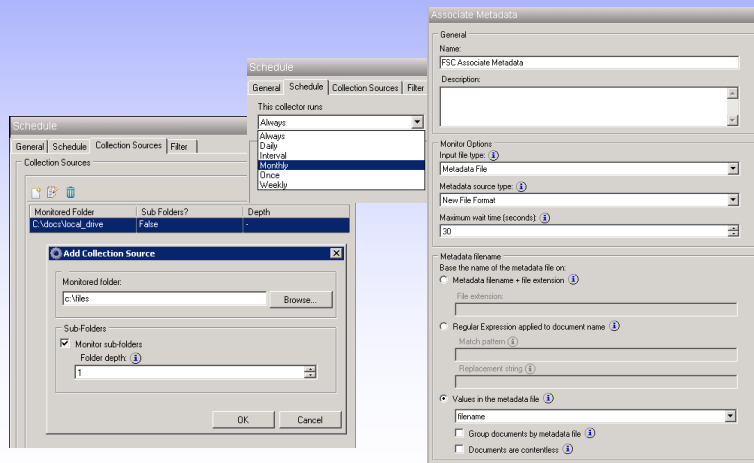
IBM Content Collector for File Systems V2.1

A Content Collection & Archiving offering that collects, enhances and manages Windows NTFS file system content

Key Features

Enables eDiscovery, Records Management, and/or Business Process Management of files, together with other forms of content via use of a common ECM infrastructure.

- Powered by *ZeroClick* policy enforcement



Reduces storage requirements and increases operational efficiency of file systems with stubbing and de-duplication

- Simplified and flexible configuration and administration
- Automated, policy driven (ZeroClick) collection & archiving of files based on monitoring file systems or folders. Manual collecting & archiving also available
- Automatically replicate fileshare source folder structure in P8 and automatically assign folder or file names based upon document metadata. Metadata in CSV and XML files can be automatically associated with fileshare documents
- Support for CM8, FileNet P8 or FileNet Image Services repositories

IBM Content Collector Enterprise Bundle

A single Content Collection and Archiving bundle that collects, enhances and manages casually created content types that contain the most cost and risk ... E-mail (Domino or Exchange), File Systems (Windows NTFS), and SharePoint – along with advanced Contextual Classification

Includes:

- IBM Content Collector for Email V2.1
- IBM Content Collector for File Systems V2.1
- IBM FileNet Connector for SharePoint Document Libraries V2.2
- IBM Classification Module V8.5

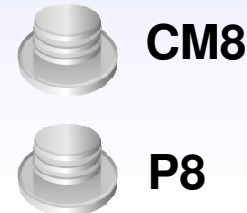
Supports CM8 or FileNet P8

E-mail

File Systems

SharePoint

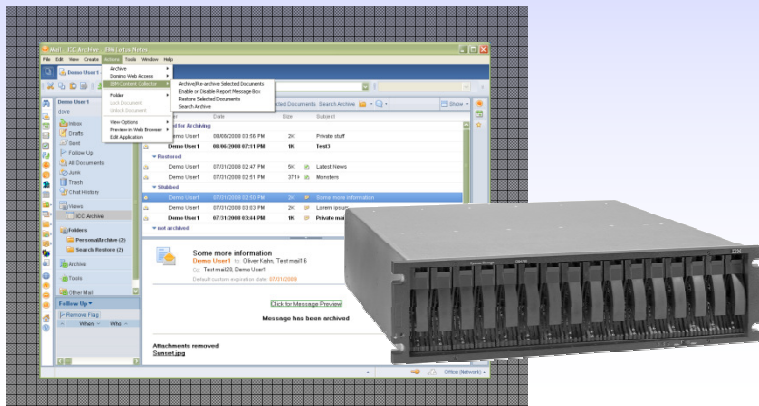
Advanced Classification



IBM Content Collector Preload Edition

Focused software & hardware solution for rapid implementation of e-mail archiving and eDiscovery

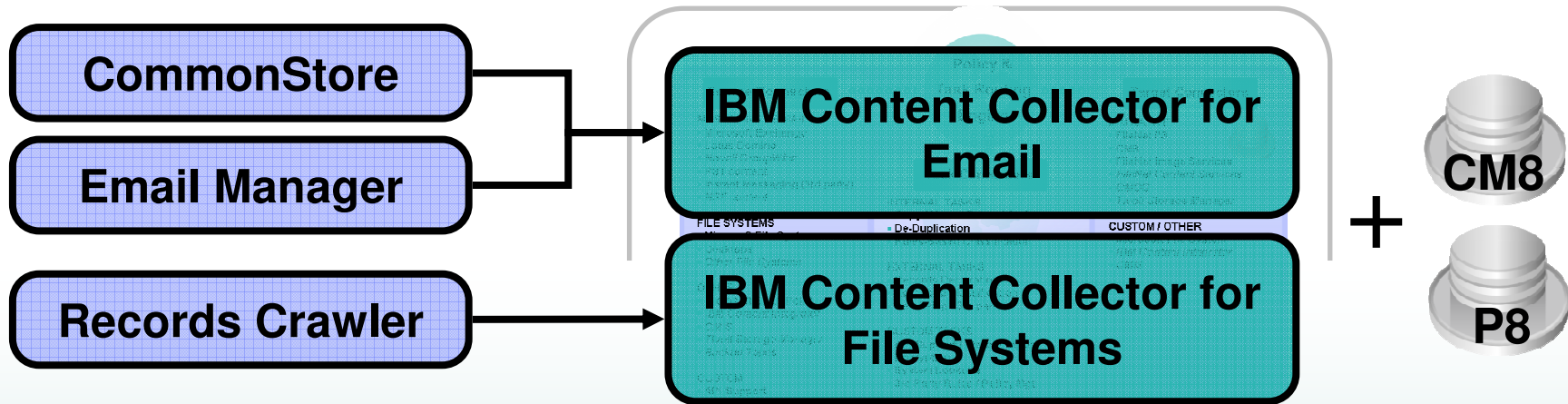
- Helps companies address immediate and future challenges with their growing e-mail systems



Appliance delivery model delivers software required for archiving and eDiscovery on xSeries Blade Server with DS4200 Storage

- Preconfigured for ease of deployment
- Designed for the business partner channel
- Services can be provided by IBM or by a growing ecosystem of business partners

IBM Content Collector is the Next Version of CommonStore, Email Manager, Records Crawler



- IBM Content Collector for Email becomes follow on to CommonStore and Email Manager
- IBM Content Collector for File Systems becomes follow on to Records Crawler
- New capability available for CS, EM, RC customers
- Content Collector upgrade requires no migration of e-mail or documents in the repository

Agenda

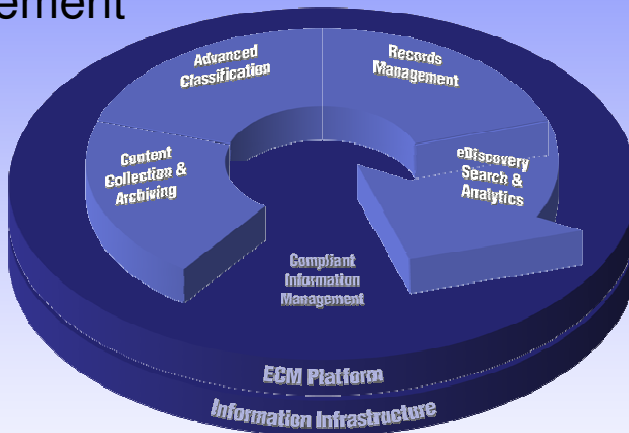
- E-mail Archiving Overview
- Isolated Archiving vs Content Collection (and Archiving)
- Content Collection and Archiving with an ECM Platform
- IBM's Content Collector Family of Offerings

Summary



Summary

IBM Content Collection and Archiving is part of a comprehensive platform approach for Compliant Information Management



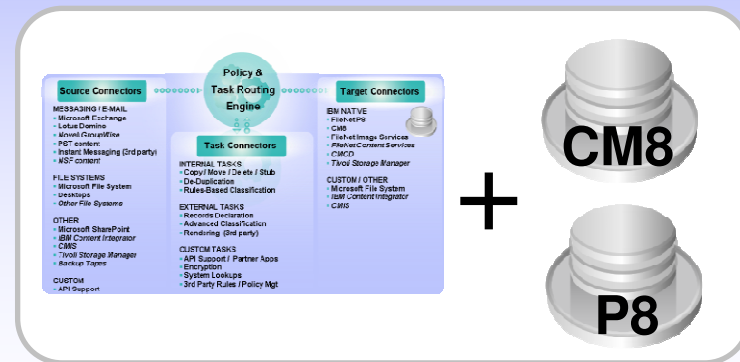
“Enterprises need consistent content management approaches to contend with the explosive volume and diversity of content... Working with ECM infrastructures and ecosystems helps avoid technology silo chaos.”

- “The Impact of Convergence On Content Management, Archiving, And Retention Policies”, Forrester Research, Inc., October 15, 2008

IBM Content Collection and Archiving:

- More than e-mail
- More than archiving
- More than an isolated solution

One ECM-based platform to Collect, Enhance and Manage



Visit the IBM Content Collection and Archiving website



Questions

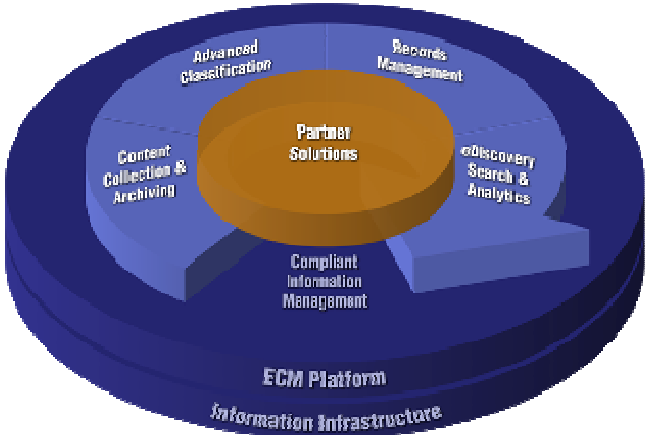


Information Management software





Thank
You



Information Management software

