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solving forward[™]

Managing Your Data With Content-Driven Archiving

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Agenda

- ▶ Reasons Why
- ▶ Market Trends
- ▶ Steps to Success
- ▶ Keeping it Simple: EDD Case Study
 - Assess, Manage, Access
- ▶ Questions

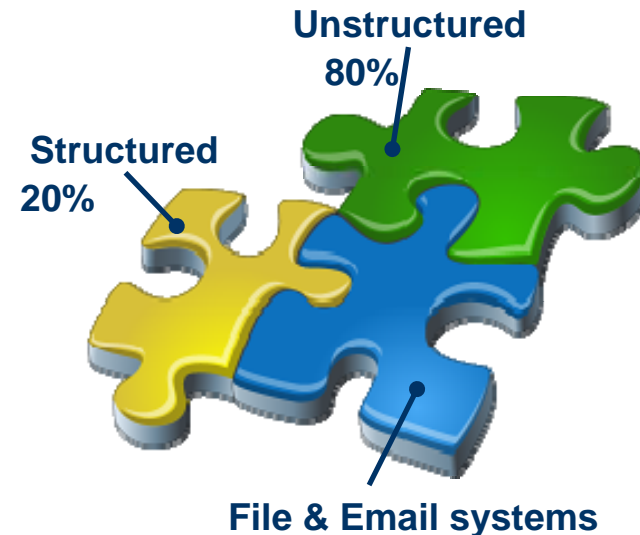
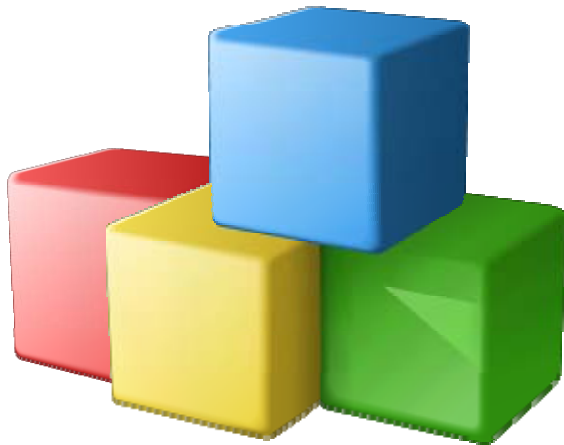




Retaining data has become more challenging

REASONS WHY

Growth Challenges



- ▶ Massive information growth
 - Growing at 70% per year
 - *Gartner 2008*
 - Outstripping business growth
 - Driving significant increases in infrastructure, operations & facilities costs

- ▶ Largely unmanaged
 - 80% of organizational information is unstructured and 90% of this remains unmanaged
 - Distributed across the enterprise
 - Stored on file servers, storage networks, email systems

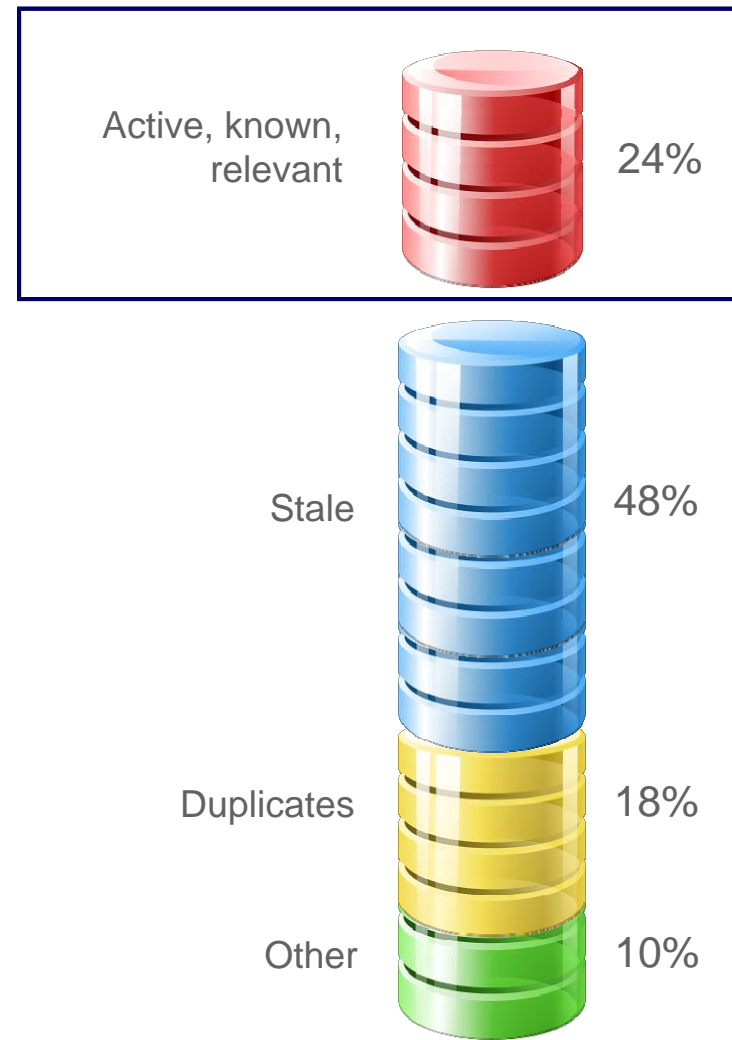


What do we have & what are we keeping?

- ▶ Only ~25% of unstructured data is actively being used
 - ~50% is stale
 - ~18% are duplicates
 - ~6% is unknown
 - ~4% is not business related

“The pursuit of knowledge in the age of information overload is less about a process of acquisition than about proficiency in tossing stuff out.”

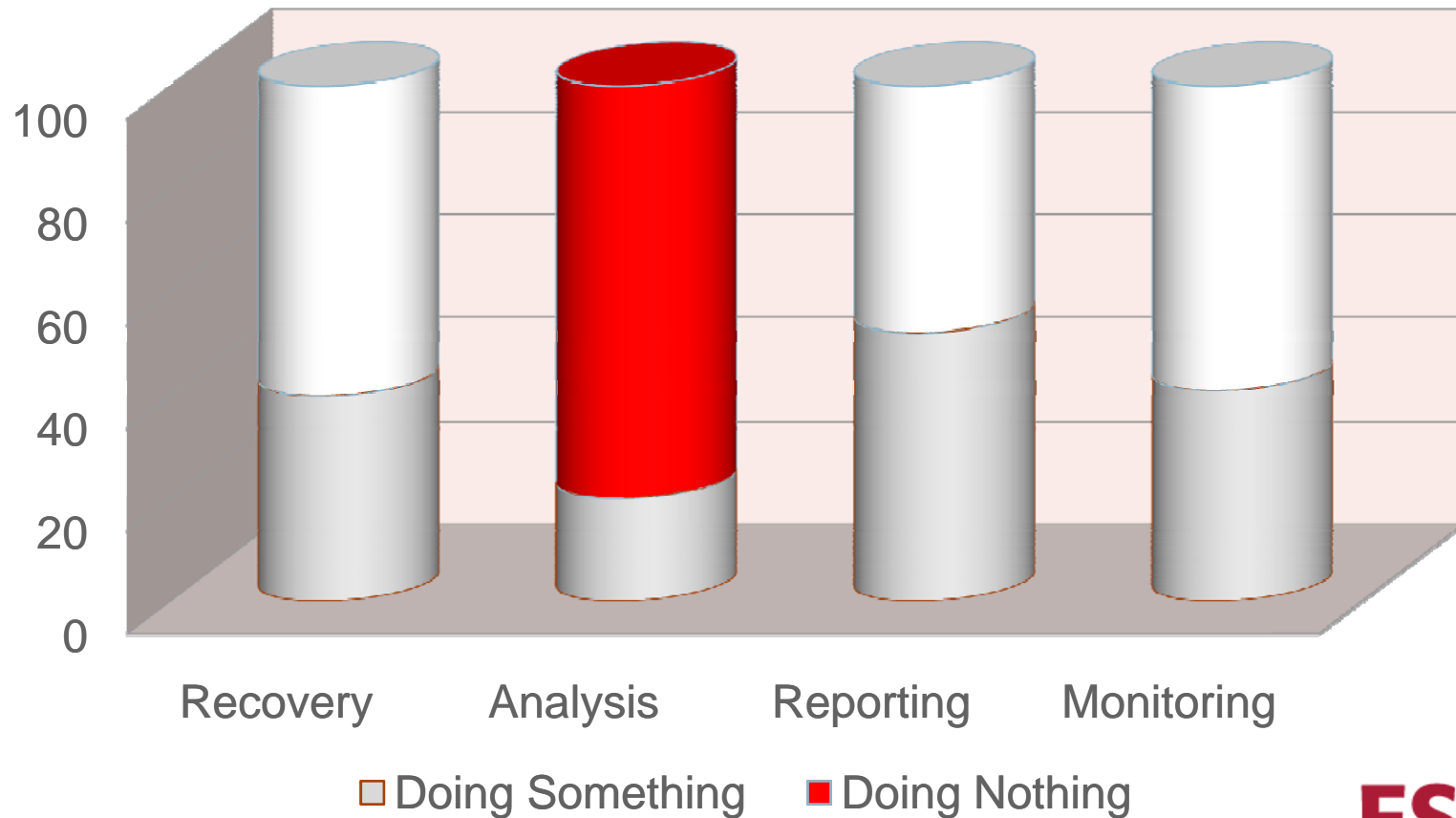
Thomas Washington
Feb 2008, CSMonitor.com





Retaining data requires understanding

Understanding Data Assets





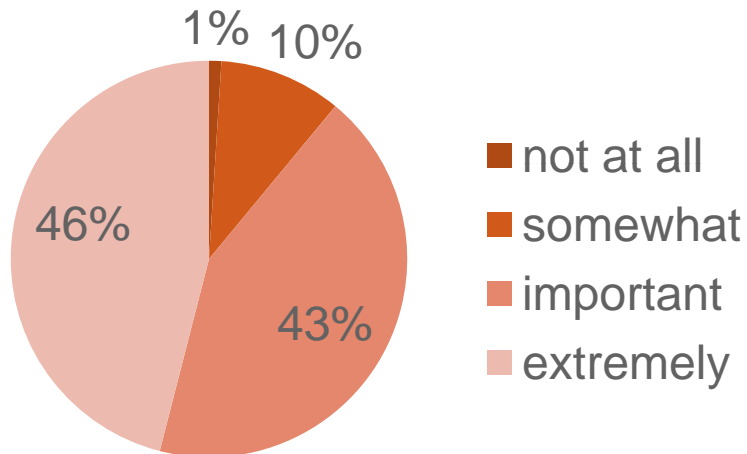
Where will we be in a few years time?

MARKET TRENDS

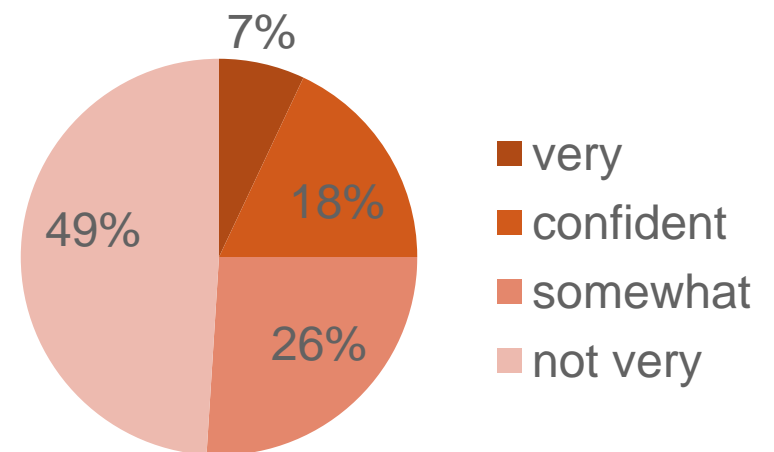
What are we seeing in the market?



How important is managing electronic information to your organization's effectiveness?



How confident are you that your electronic information is accurate, accessible and trustworthy?

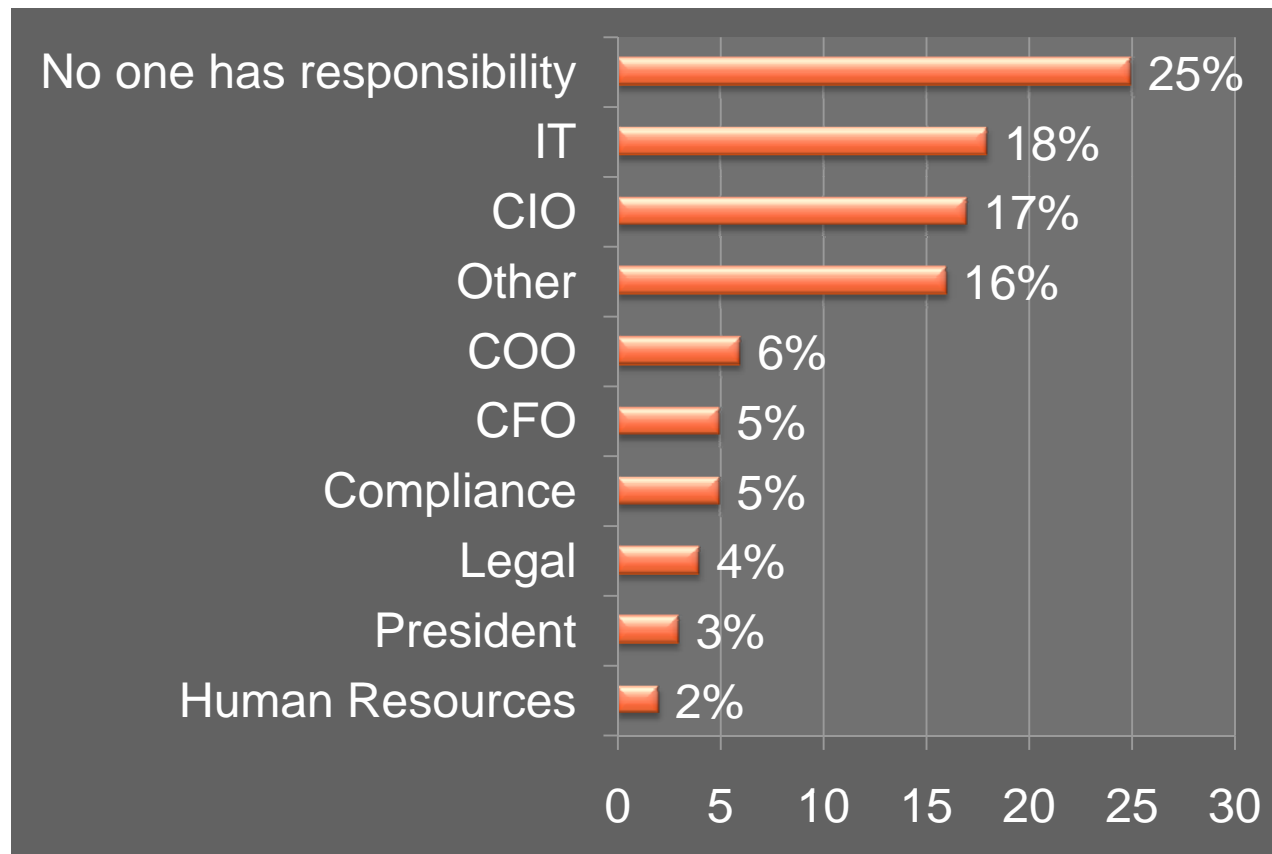


Source: Allim Content Research, 2009

What are we seeing in the market?



To whom do the staff responsible for managing electronic records report in your organization?



Source: AIIM Content Research, 2009

Greater need to control



- *80% of organizational info is unstructured and 90% of this remains unmanaged*
- *Unmanaged data is growing at roughly 36% annually*
- *There is a 10x cost of compliance by taking a one-off vs. integrated approach*
- **TOP 3 PROJECTS IN 2008**
 - *Document Control*
 - *Records Management / Archiving*
 - *Email Management*

Source: *AIM Content Research, 2009*



How to build structure around unstructured information

STEPS TO SUCCESS



Step #1 – Define Your Processes

- ▶ Every organization and every employee has processes
 - ▶ Not every process is managed
 - ▶ Processes can transcend specific roles, reporting structures, firewalls, etc.
 - ▶ THEN:
Think about how some of the processes can be automated / structured using document management or other workflow solutions
-



Step #2 – Define Business Requirements

- ▶ Survey key stakeholders
 - Interview key process owners and information sources
 - Interviewing – The Rule of Fives
 - ▶ Analyze existing processes
 - What is the as-is scenario and where does IT fit in?
 - ▶ Define “to be” scenarios
 - Define and document use cases and identify any gaps
 - ▶ Define technical requirements and architecture
-

Step #3 – Build a Strategy

- ▶ Inventory existing assets
 - ▶ Map business requirements to technical requirements
 - ▶ Identify key integration points
 - How is data being handed off?
 - How does IT fit into the handoff process?
 - ▶ Do not forget about governance and policy!!
-

Step #4 – Governance & Policy

- ▶ Top 3 obstacles in implementing new technology
 - Process and organizational issues
 - Poor procedures and enforcement
 - Lack of internal training

 - ▶ Who owns the process?
 - Identify process owner
 - Document policies and procedures
 - Provide support staff where necessary
-



Tips for Building Structure Around Data

- ▶ Not all content is the same
 - Business content that grows out of desktops
 - Transactional content
 - Persuasive or creative content (think IP)
 - ▶ Keep ESI as ESI
 - ▶ Paper won't go away
 - ▶ Keep it simple
-



Keeping it Simple – What we're doing at EDD

ASSESS, MANAGE, ACCESS

EDD: Organizational Challenges

▶ Retention

- How do we move away from using Outlook as our organizational filing cabinet?

▶ Classification

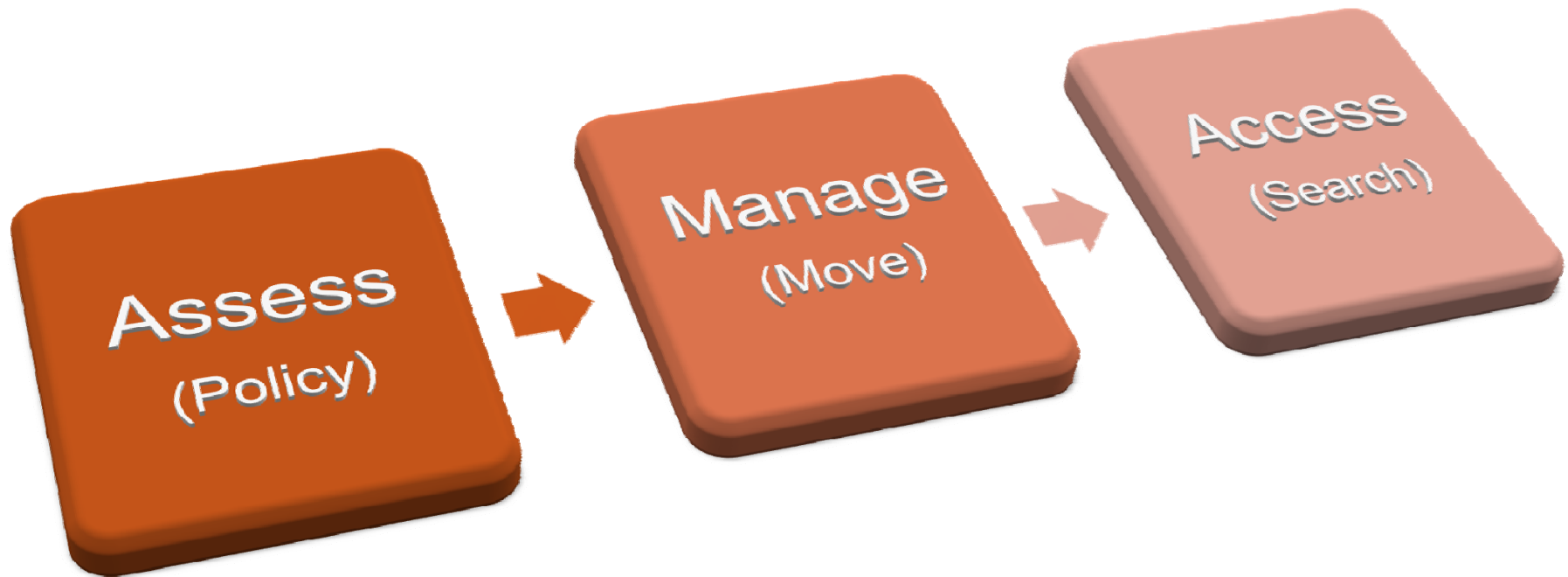
- How do we apply and enforce our retention policies based on content?

▶ eDiscovery & Public Information Requests

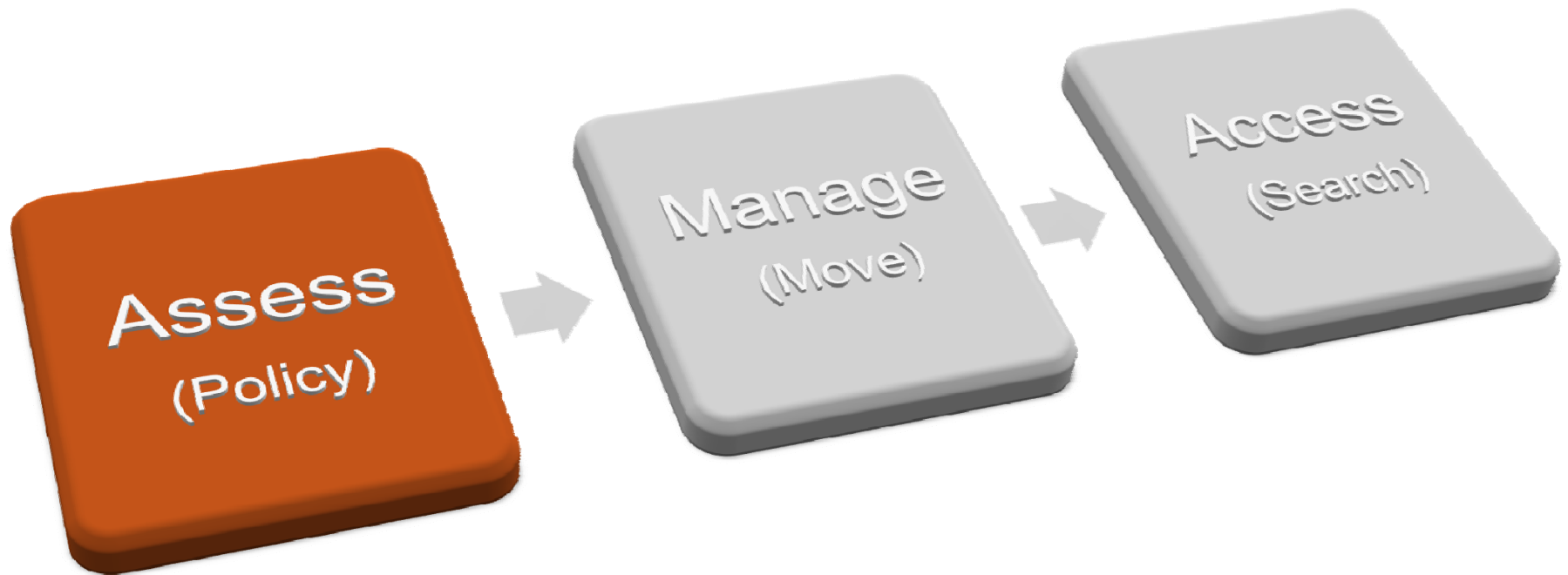
- High litigation profile, especially in today's economy
 - How do we effectively locate information and provide it to other parties (i.e. the public, in-house or outside counsel)
-



Managing Unstructured Data Based on Content



Keeping It Simple





Asses: Analysis & Reporting

Storage Resource Analysis and Trends

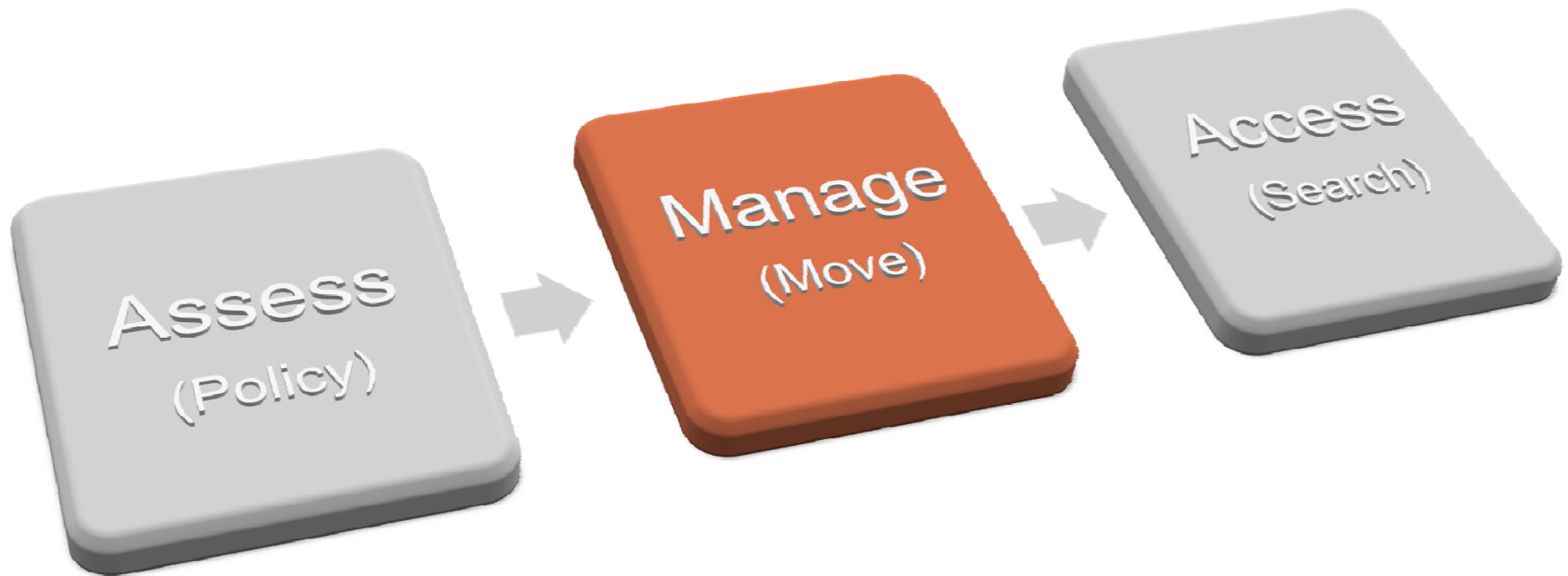
► Overview

- Storage Vision
 - File Distribution Reports
 - Exchange Personal Folder Reports
 - Size, Age and Prohibited File Reporting
- Application Vision
 - x% Mailboxes are over 1GB in size
 - x% Public Folder >1 year old
 - x% Attachment are specific type
- Database Vision
 - Detailed settings, size, owner, age
 - Missing backups new databases
 - When Growth will exceed capacity
- Capacity & Trending
 - Detailed & Excess file types, size, owner, age...
 - Age of data
 - Historic consumption by volume
 - Volumes with less than x% free space
- Suggested Actions
 - Adjust File Groups location
 - Remove non production/ offline DBs
 - Set warnings on capacity/ backup issues
- Suggested Actions (Cont'd)
 - Set thresholds to warn of low space
 - Expand volumes / re-provision space
 - Migrate or archive stale data
 - Delete Orphaned mailboxes
 - Notify users and purge prohibited files
 - Set notification for future violations

► Key Benefits

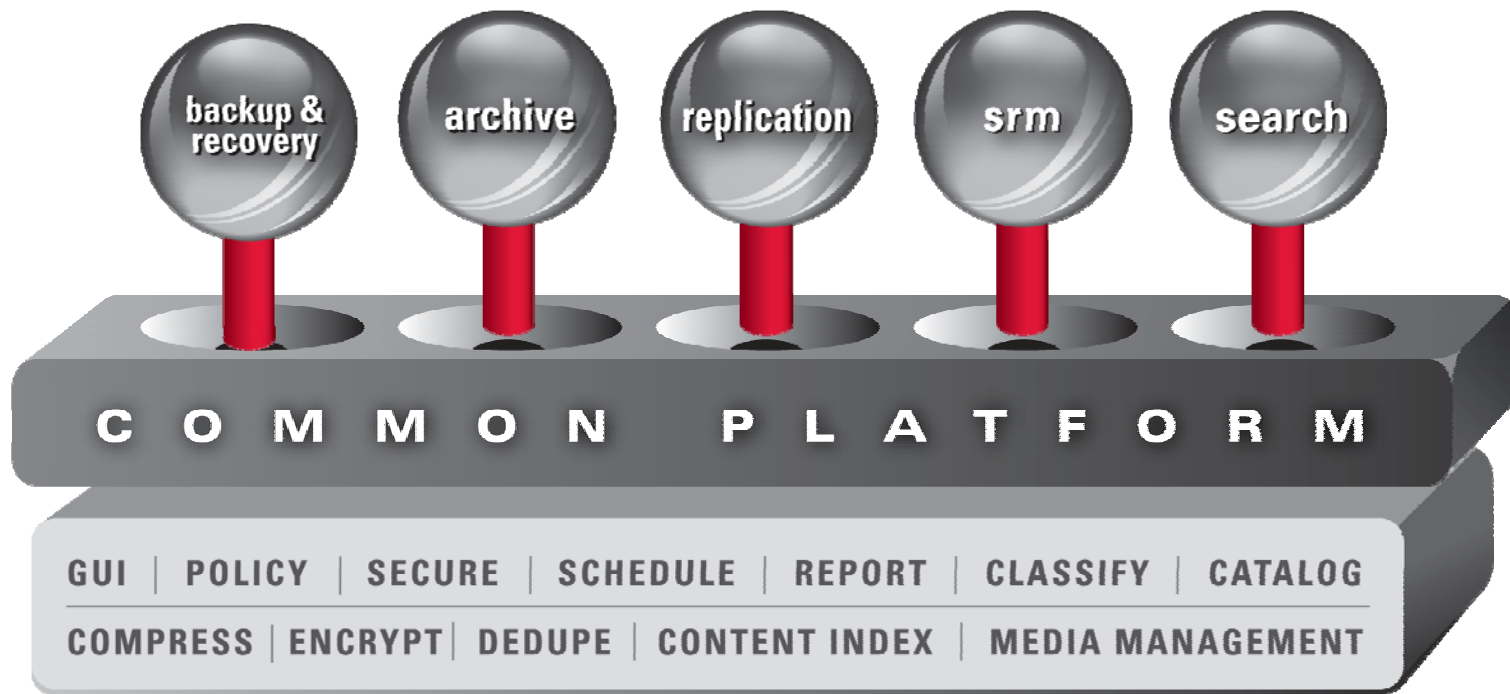
- Identify candidate stale and untouched data for archiving
- Build informed & intelligent policies
- Reclaim over & under utilized storage resources
- Identify the location and owner of junk, multimedia, and prohibited file types

Keeping it Simple



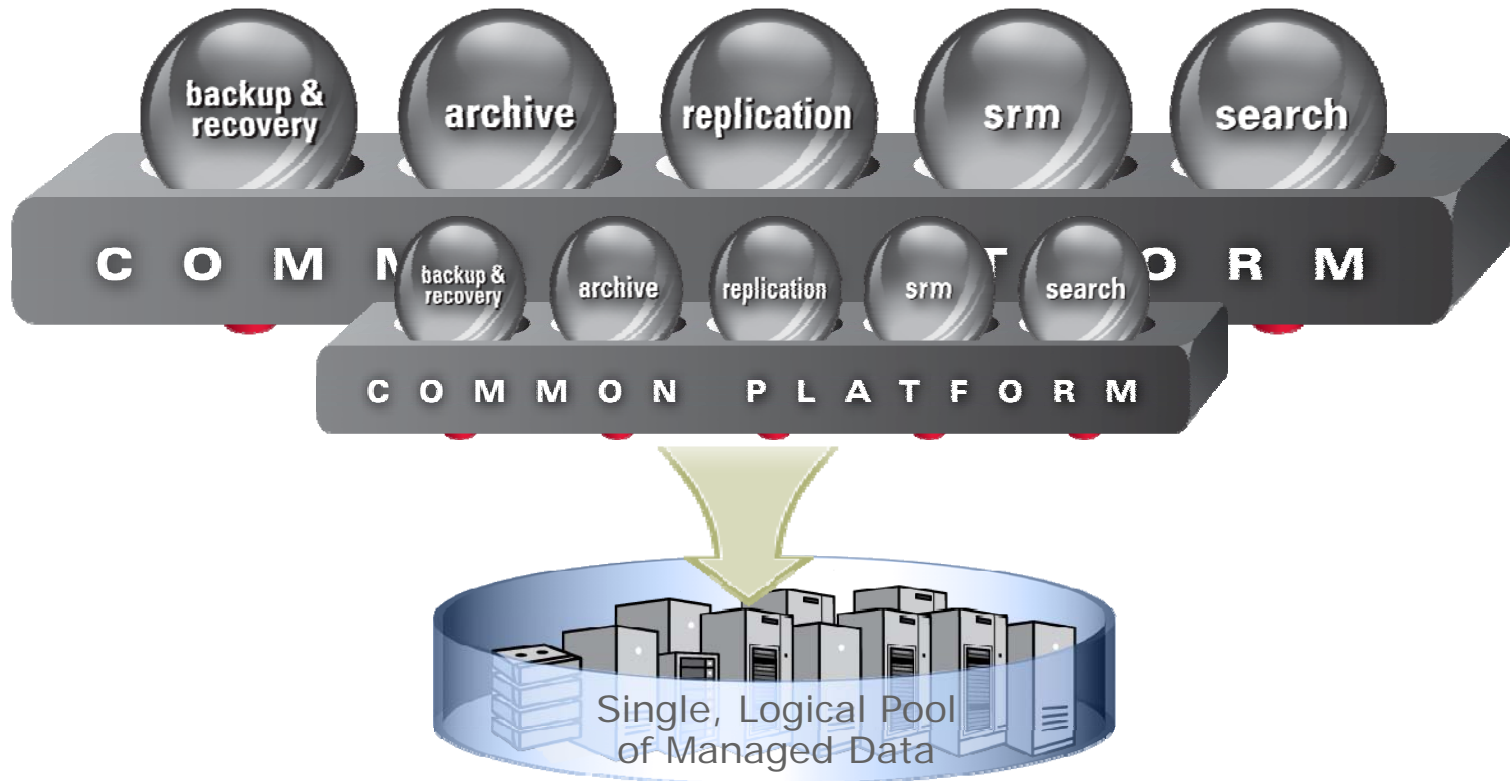
Simpana 8.0

The Key to Truly Unifying Data Management



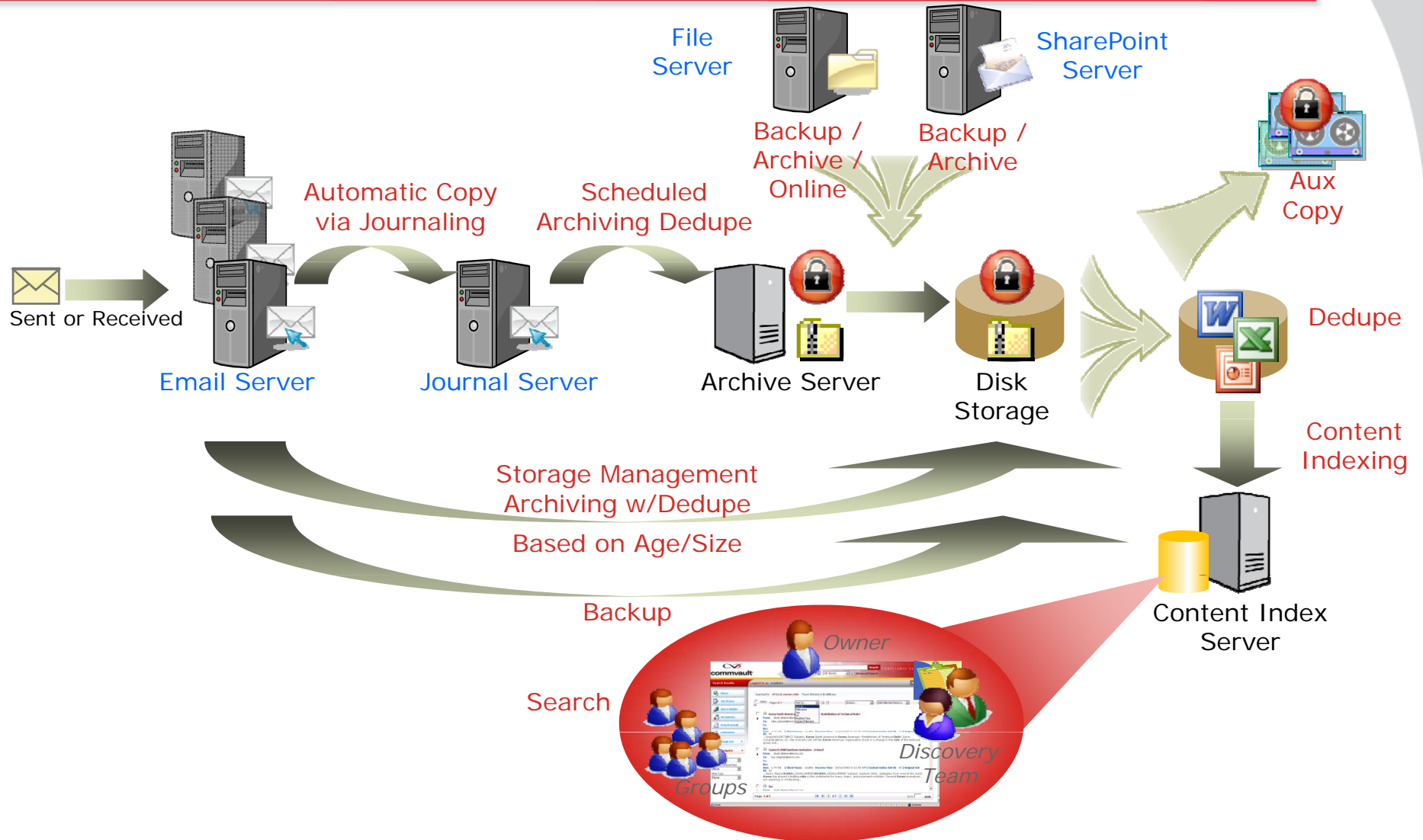
One Platform, One Approach

Unified Data Management & Information Access





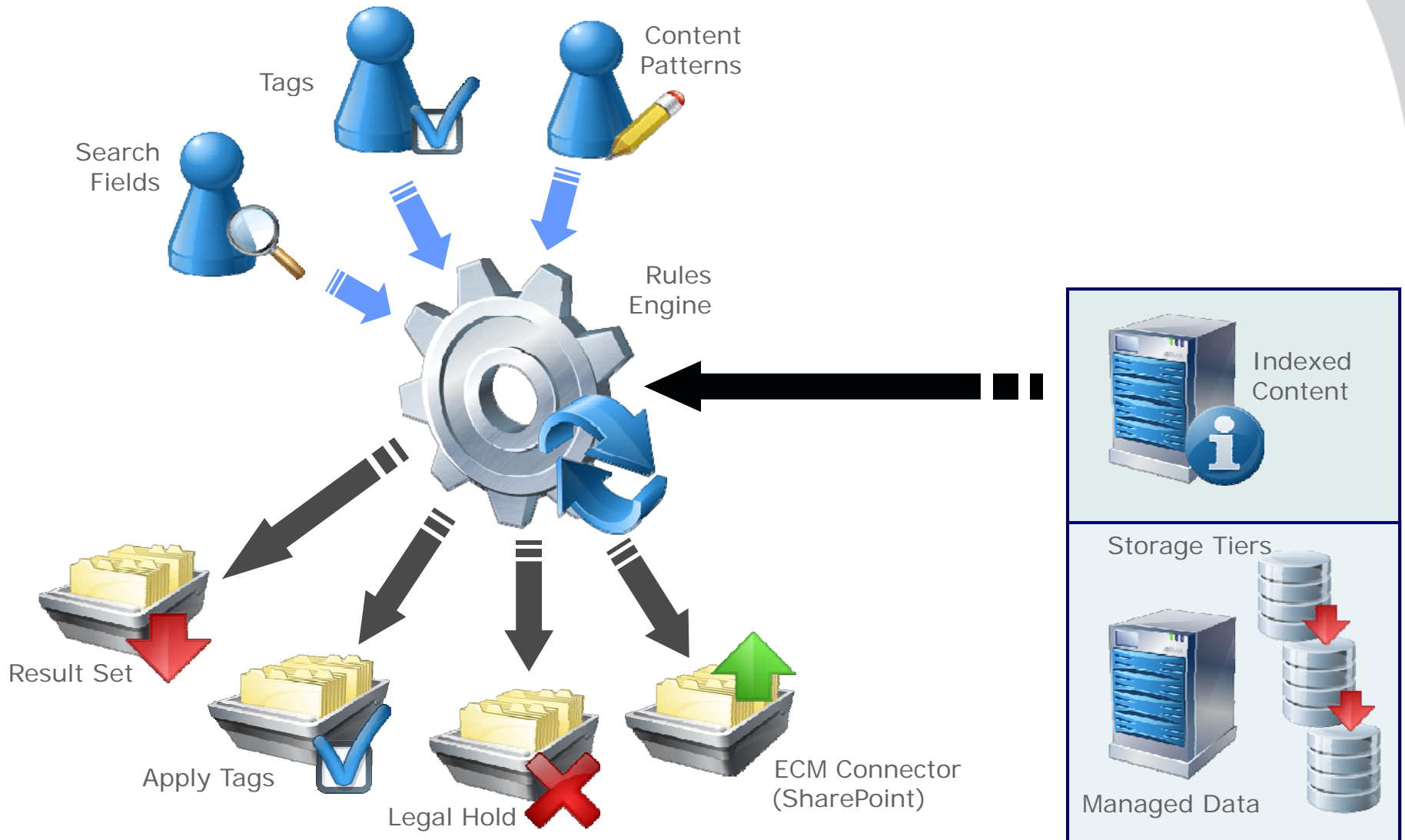
Our Process – Capture & Access





Content Director

Using Content to Drive Operations





Manage: Retention & Security

Capture data - Apply retention - Ensure Security

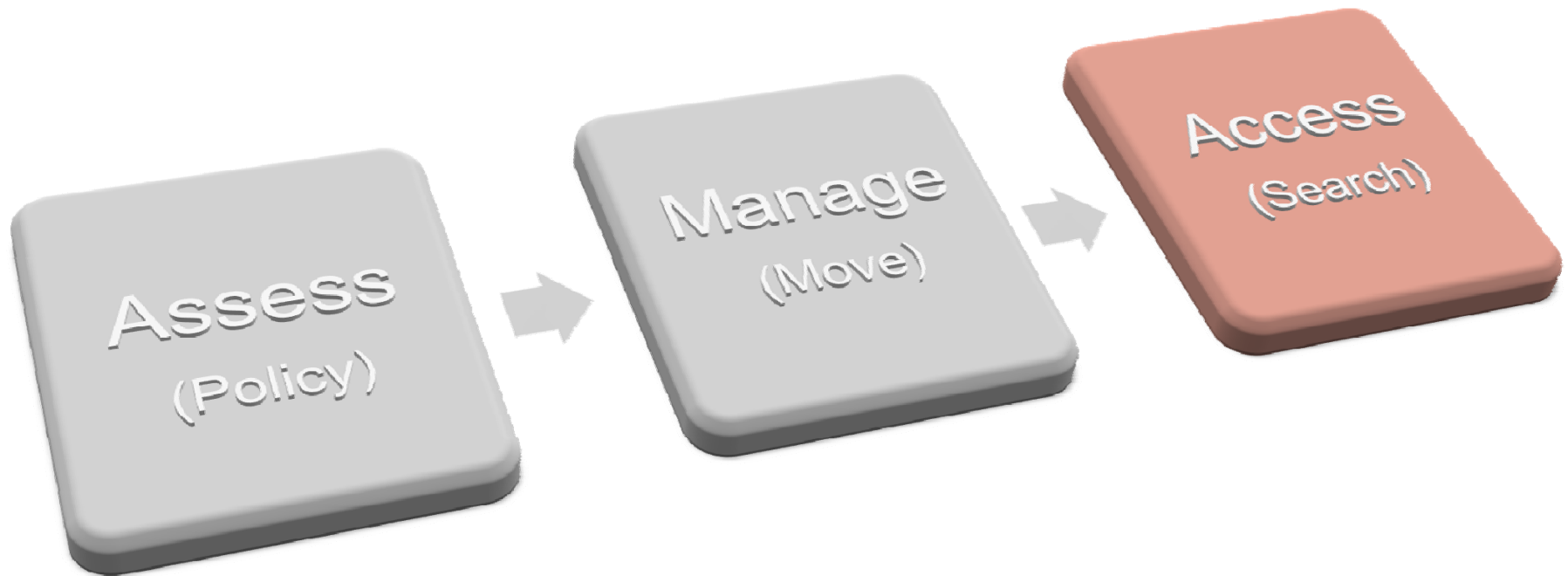
► Overview

- Capture data from email and file servers
- Seamless to end user
- Migration & retention policies
 - Centralised management
 - Archiving Rules & Exceptions
 - Data Classification
 - Retention & Deletion
 - Lifecycle Access
 - Customised / Filtered Processing
- Security
 - 5 Levels of Encryption (128-256 bit)
 - Audited from capture to access
 - Rights to Access Preserved
 - Compliance/Discovery Access
 - Security Model Spans All Devices
 - Secure Indexes
 - Secure Client Caches

Key Benefits

- Best in class storage optimization
- Flexibility to change retention and storage policies
- Authenticity
 - Binary signatures
 - Built in encryption
 - Built in auditing

Keeping it Simple



Information Access

Universal Discovery: all data copies, future proof, legal hold



Tom Jones

Search Vault - Compliance User - Windows Internet Explorer

http://fbcellco.fishbowl.com/vault.com/compliancesearch/RestoreRePage.aspx?resultSet=preservation

Search Vault - Compliance User

Search

commvault

Create new legal hold Add to existing legal hold

Create a New Legal Hold

Legal Hold Name: preservation

Description: Documents for court case X32TY

Retention Policy: Legal Hold Policy

Default Retention: Infinite

Extended Retention

Set Infinite Retention

Retention Date: [calendar icon]

OK

-
- ✓ Disk & Tape
 - ✓ Backups
 - ✓ Documents
 - ✓ Emails & PST
 - ✓ Files (UNIX, SIFS)
 - ✓ Exchange & Notes
 - ✓ MS SharePoint
 - ✓ 3rd Party Sources

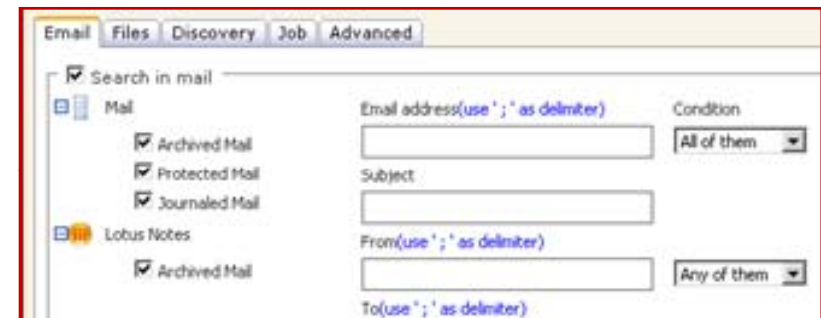


Information Access

Key Capabilities: Web Search

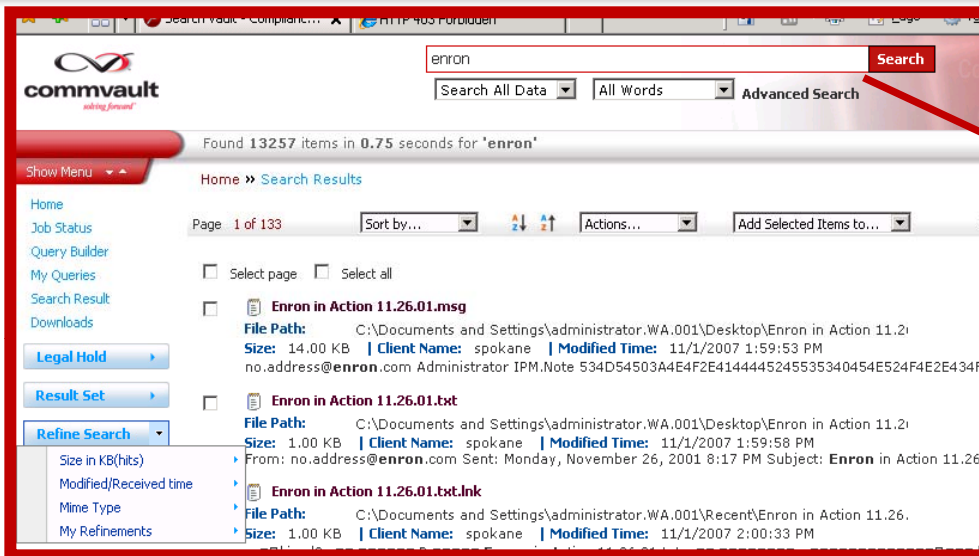
Advanced Search

- Tabbed, better organized
- User preference based on defaults



Streamlined Discovery

- Single search by user or group – against the entire pool based on ownership or access
- Conditions AND, OR, NOT



Enhanced Search

- Cleaner, more streamlined interface
- Optimized for smaller views (folding controls, hide menu)
- Refine search (classifications, search-in-a-search)
- New user preference controls:
 - Saved queries
 - Downloads
 - Result Sets
- *New Legal Hold option for Discovery Users



Information Access & eDiscovery

Search: Users, Corporate & General Counsel (GC), Legal Hold

► Overview

- Content Indexing
 - Full Content
 - FAST Instream
 - 370+ Types, 77 Languages
 - Unity Federation
 - Global eDiscovery
- Offline Sources
 - Simpana Archive
 - Email: Exchange & Domino
 - File: CIFS, UNIX, fPolicy
 - Document: SPS, MOSS
 - Simpana Backup
 - All sources including NDMP
- Online Sources
 - File: CIFS, NFS, OnTap
- Search
 - Web Interface
 - Result set collections
 - Query Builder & Scheduler
 - Simple, Advanced & Filtering

► Key Benefits

- Improved user productivity
 - Simple and easy to use
 - Auto-preview, view and restore
- Corporate information access
 - Global scope
 - Customizable design
 - Advanced filtering and search capabilities
 - HTML Future proofing
 - Data export to PST, CAB
- eDiscovery Management
 - Identification
 - Collection
 - Preservation (Legal hold)
 - Filtering & Refinement
 - Content Annotation
 - Export to XML



Thank you & questions?

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