

IBM Smart Archive

Take A Smarter Approach to Archiving with IBM

PulseANZ2010

Meet the people who can help advance your infrastructure





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Today's Agenda

- The Imperative to Build a Smarter Archive Strategy
 - Information Explosion
 - Information and Infrastructure Chaos
 - Archiving is No Longer an Option
- IBM Smart Archive Strategy
- Introducing IBM Information Archive
- Existing and New Solutions Being Announced
- Why IBM





Information Explosion

Information Week Survey:

70% say Regulations drive up storage demands, businesses realizing they **must** classify, manage, delete data - not just keep adding storage

Volume

Every day, **15 petabytes** of new information are being generated. By 2010, the amount of digital information will grow to 988 exabytes



Variety
80% of new data growth is unstructured content, generated largely by email, with increasing contribution by documents, images, and video and audio.



Velocity

An average company with 1,000 employees spends \$5.3 million a year to find information stored on its servers. 42% of managers say they use the wrong information at least once per week.

Information Week, "State Of Enterprise Storage Changing Priorities, Changing Practices", Jan 2009. Delahunty, Steve IDC: Expanding Digital Universe, 2007

IDC: "The Hidden Costs of Information Work" March 2005

Accenture: Managers Say the Majority of Information Obtained for Their Work is useless 2007 http://newsroom.accenture.com/article_display.cfm?article_id=4484





Information Chaos Creates Many Challenges

Valued information is buried beneath too much unnecessary information (over-retained, duplicated, irrelevant)



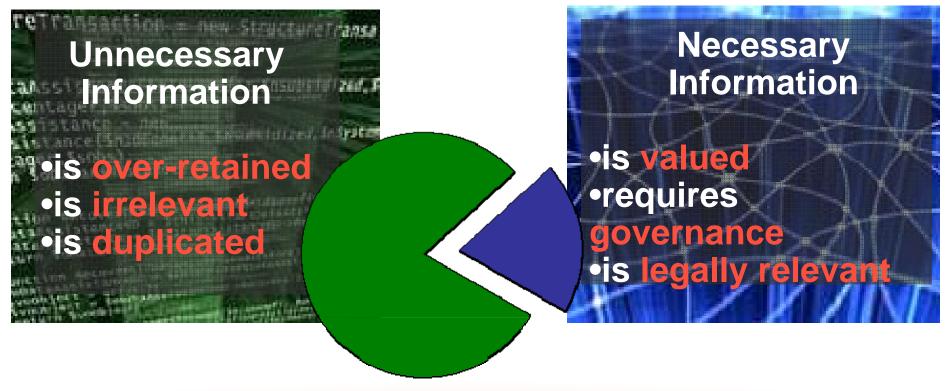
No information visibility to unlock what, why where in a trusted accurate manner

Runaway storage and infrastructure costs, with power, space and budget challenges

'nability to produce cal information under nitive scenarios and deadlines



More than 80% of information is unnecessary, and so unnecessary information eclipses necessary information



How much of your information is over-retained, irrelevant or duplicated?

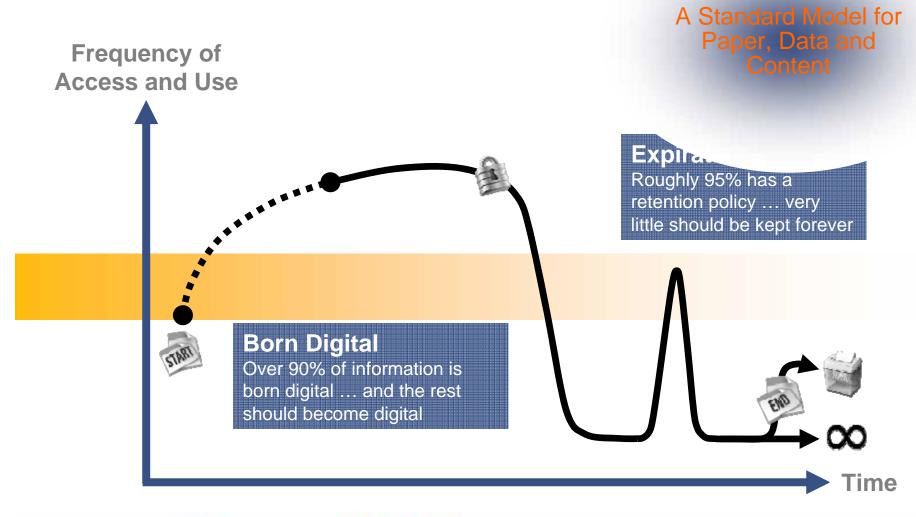
70% ... 80% ... 90% ... How do you know?

Why would you want to keep any information that is not necessary to keep?





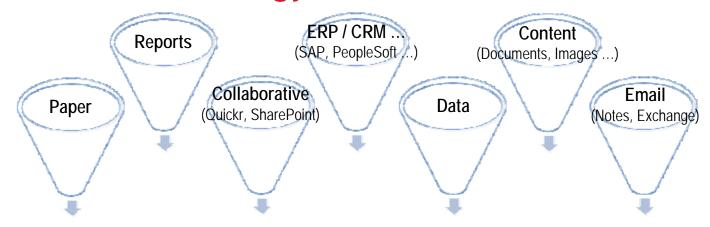
Information Has a Lifespan Requiring Disposition







IBM Smart Archive Strategy



Value Added Services

- Optimisation Services
- System Services
- Managed Services
- Reference Architecture
- Information Governance

Cloud Ready
Archive Storage with
Optional ECM

Optimised and Unified Assessment, Collection and Classification

Flexible and Secure Infrastructure with Unified Retention and Protection

On Premise (Custom Config)



Appliance (Pre-Config)



As A Service (SaaS, Multiple Options)



Integrated Compliance, Records Management, Analytics and eDiscovery



IBM Smart Archive ...

The "Keep Everything Forever Model Has Failed"

... a Smarter Approach is Needed

Optimised and Unified Ingest

 Enable a deeper understanding of what information to archive through discovery and analytics based assessment technologies. Eliminate point solution complexity and cost by unifying data and content archiving through common collection (ingest) and classification technologies.

Flexible and Secure Infrastructure

- Enable cost-optimised retention with unified, flexible, secure and policy aware infrastructure.
 - Develop policies, optimise and protect with business analytics and optimisation, business continuity and resiliency, archive and storage management, and managed services.
- Speed time to value through multiple modular yet integrated solutions including choice of management and delivery models based on a common information lifespan and policies.
 - Traditional on-premise software, preconfigured appliance, software-as-a-service, cloud ready and hybrid options

Integrated Compliance, Records Management, Analytics and eDiscovery

 Reduce risk, respond more quickly to legal inquiries, establish trust and leverage information using integrated compliance, analytics, records management and eDiscovery software.

Unites the power and value of IBM Software, Systems and Services.



information



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Introducing IBM Information Archive Next Generation Information Retention Solution

A universal, scalable, and secure storage repository for structured and unstructured information

A fully integrated archive appliance

Addressing the complete information retention needs of mid-size and enterprise clients

Application support including IBM ECM and Optim with policy harmony







Positioning TSM and Information Archive

Tivoli Storage Manager Software

- Full featured storage management software offering
 - Backup/recovery/ HSM/DR and much more
- Simple archive Non Compliant – (compliant/policy-based retention data must use SSAM)
- Software only- so sits in existing environment
- Built around recovery

System Storage Archive Manager Software

- Archive only selected information, based on business value
- Ensure the information can be easily retrieved later
- Offers maximum / strict retention policies for archived information
- Ensure the information is unaltered and retained until policy expiration
- Move to lowest cost storage when possible combining disk and tape with lowest cost of ownership
- Can not control access and alteration of data from outside of itself

Information Archive Solution

All the benefits of SSAM plus:

- Tightly integrated bundle of hardware, software and installation services
- Self contained little setup required – quicker-time-tovalue
- Wizard-based management features
- Additional collection options
- Offers flexible retention policy options including Basic, Medium & Maximum
- Accessible via industry standard NFS file protocols
- Additional patent-pending tamper protection



Inside IBM Information Archive



Hardware

- Dual 4-core clustered Linux servers
- Integrated (closed) appliance
- Internal IP and SAN networks
- SATA storage
 - RAID 6, 402 TB max usable
- PBs of external tape (optional)
- HW-based disk replication

Software

- Tivoli Management Software
- System Storage Archive Manager
- Tivoli Storage Manager HSM
- General Parallel File System

Security

- Role-based administration
- No root access in compliant mode

Management Node

Management Console

NAS / SSAM / GPFS Linux Server (1 to 3)

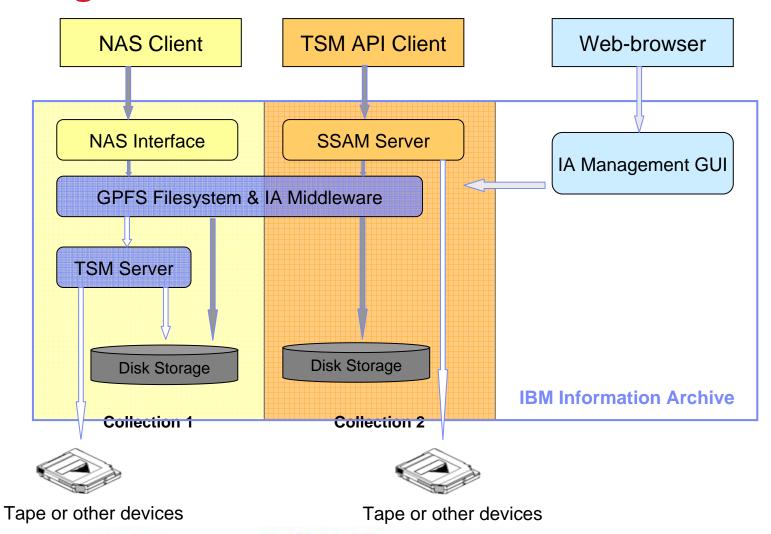
Storage Expansion (Up to 6)

Storage Controller (1)

Ethernet / FC Switches



IA High Level Architecture



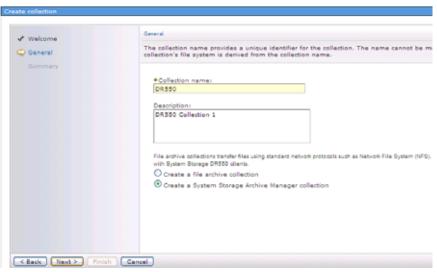




Archiving Documents

- TSM API or TSM Archive Client
 - Managed by SSAM server
 - SSAM retention policies and functions
 - Supports time and event based retention and retention holds
 - 2 storage tiers
 - Disk compression/deduplication
 - Tape (optional)
- NAS protocols (File Archive)
 - NFS
 - Supports time and event based retention and retention holds via:
 - Auto-protect with retention policies
 - NetApp SnapLockTM compatibility
 - Metadata files to control retention
 - 3 storage tiers
 - Tier 1 archive disk high speed data transfer and ingestion (retention, ...)
 - Tier 2 archive disk compression/deduplication
 - Tape (optional)

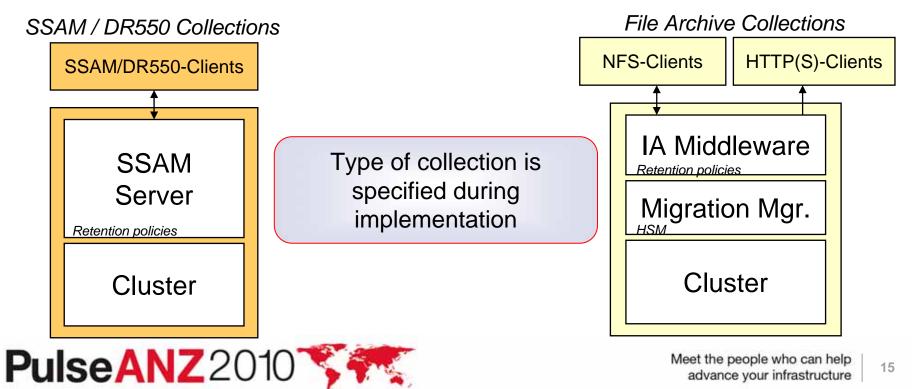






IA Collection Overview

- IA collection concepts:
 - Collection represents an encapsulated set of archive data
 - Customize collections by value of the information, department, degree of protection, etc.
 - Collection consists of hardware & software components
 - Up to three clustered collections can be configured in one IA appliance (R1)
 - Collection has an external interface: NAS (NFS) or TSM API or B/A interface (SSAM)
 - High availability by synchronous or asynchronous replication to another disk controller





Customizable Protection Levels

Most Flexible and Most Comprehensive Data Retention Policies

Basic Protection

- Documents can be deleted before they expire
- Retention periods can be increased and decreased
- Documents with an extended retention because of a retention hold can be deleted
- You can modify the document protection option to one of the other levels at any time

Intermediate Protection

- Documents cannot be deleted until they expire
- Retention periods can be increased and decreased
- Documents with an extended retention due to a retention hold cannot be deleted
- You can modify the document protection option to maximum at any time but cannot lower in basic
- The collection cannot be deleted

Maximum Protection

- Documents cannot be deleted until the end of their retention period
- Documents with an extended retention because of a retention hold cannot be deleted
- Document retention periods can be increased, but not decreased
- After it is enabled, you cannot modify the document protection option to one of the other levels
- The collection cannot be deleted
- This is SSAM collections' only level

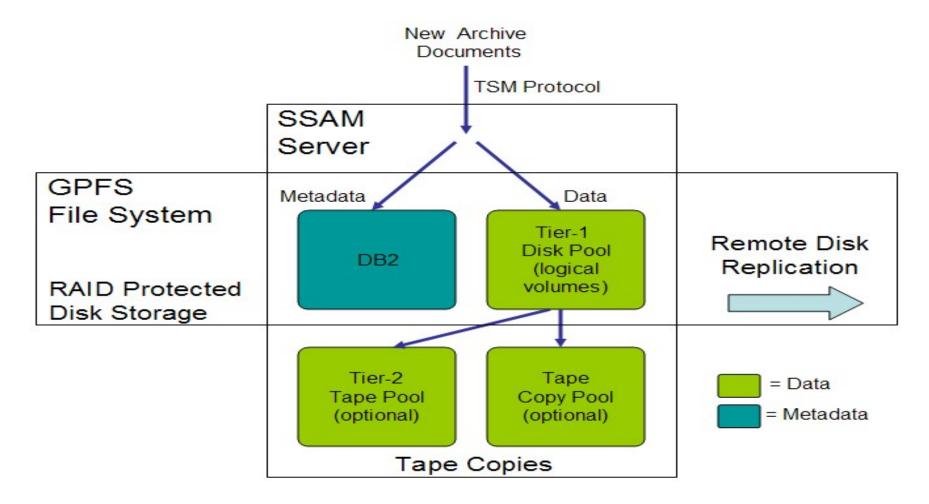




Intermediate

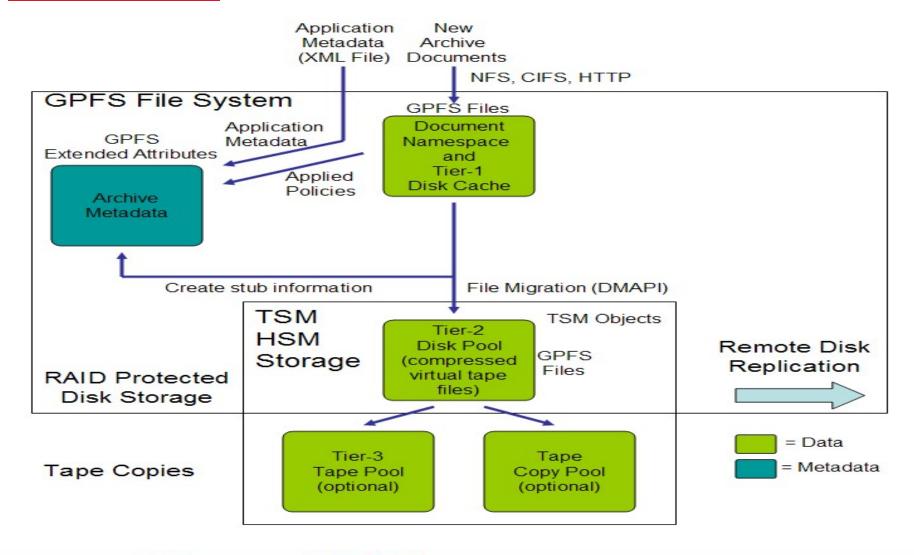
Maximum

SSAM Collection Architecture





File Archive Collection Architecture



Admin UI



IBM Information Archive - Flexible Retention Policy Management

Archive Infrastructure Layer enables policy sharing while serving both disk and tape drives

Archive Infrastructure Layer

- Policy Based Retention with Sharing Enabled
- Tiered Storage Hierarchy Management
- Standard Ingest Interfaces
- Indexing and Search*
- Automated Data Migration for Long Term Preservation

Disk Storage Layer

- Low cost Storage
- De-Duplicating Storage
- High Performance Ultra Dense Storage

Tape Storage Layer

- High Arial Density Cartridges
- High Capacity Tape Frames
- WORM and Encryption Capabilities

IBM Information Archive





Data Optimization Features

Deduplication

Single instance storage of data



Compression

Client side & tape compression can, on average, reduce the data's size by 60 - 90%



Hierarchical Storage Management

Automatically distributes and manages information on disk, tape, or both





Data Deduplication

- IA supports data deduplication on disk
 - Based on TSM 6 data deduplication technique
- For NAS collection: Data is deduplicated after migration to TSM Server
- For SSAM collection: Data is deduplicated after archived to SSAM
- Data is reduplicated when written to tape
- Recommendation: only use deduplication on disk when at least one original copy is available



Storage



Advanced Data Protection Features

Encryption

Encryption can provide added security for data storage and remote data transmission



Enhanced Tamper Protection

Patent-pending feature eliminates root access



Shredding

The destruction of deleted data, in non deduped, random access stgpools, to make it difficult to discover or reconstruct that data later.





Advanced Data Protection Features

Multiple Protection Levels

Basic to maximum protection levels address all possible data retention requirements

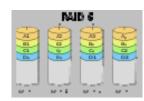


Enhanced Disaster Recovery Advance Copy Services increase the availability of archived documents and prevents data loss in the event of a disaster



Redundancy

Clustered nodes & Redundant Array of Independent Disks (RAID) 6 to maintain data integrity even in the event of two disk failures.







IA User Interface

- Centralized User Interface hosted by management node
- Provides functions for
 - User management and Role Assignment
 - TSM Server administration (via IAC)
 - Tivoli Common Reporting (TSM and IA reports)
 - IA Administration
 - IA appliance administration (configuration, monitoring)
 - IA collection administration (setting and behavior)
 - IA Service functions (collect logs, launch IBM Director)
 - IA Audit functions (manage and download audit logs)
- Accessible via browser (IE, FF)
 - https://<mgmt-node>:9043/ibm/console





Admin Console – Audit Logs

- System generated, tamper-proof records of events
- Use to verify that documents are being stored in a way that meets your regulatory and legal compliance requirements
- Downloaded directly from Admin Interface or access remotely using NFS protocol
- Records are subject to the document protection level of their associated collection
 - Default retention of period is 5 years
 - Plain text system related events and document related events
 - Event chronology
 - Document type
 - File name
 - Owner name
 - Application name
 - Event status







Key Features

Features	IBM Information Archive
Ease of Use	Appears as a file-server, simply drag and drop files to Information Archive.
Installation and Implementation	Information Archive is physically installed by a Certified Engineer. Quick configuration via wizards. Dynamically add storage.
User Interface	Single, task oriented GUI to manage the entire solution (+ CLI)
Application Interfaces	NFS, SSAM, CIFS*, HTTP read, FTP* – all within IA
Scalability (per Information Archive)	Supports billions of objects per collection – up to 3 collections (Archive into three separate collections)
Retention Policies	Accepts retention policies from applications (including ECM) or creates them
	(Event-based or time-driven) enabling policy harmony
Compliance / Security	Each collection can be configured with different protection levels (basic, intermediate, maximum). New patent-pending "Enhanced Tamper Protection" technology increases security
Index / Search	Full text indexing and search (both data and metadata)*



Today's Agenda

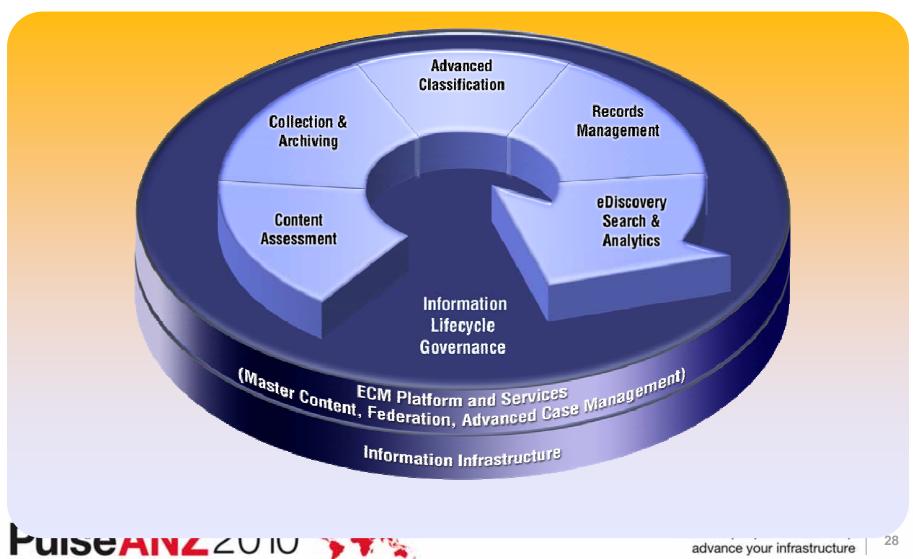
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IBM Information Lifecycle Governance (ILG) Model

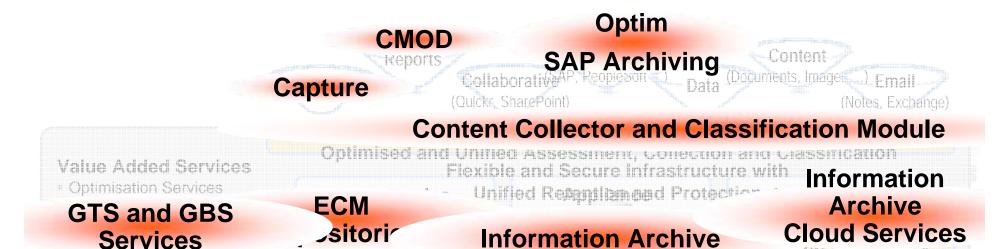
Information Governance Throughout the Information Lifespan





Key IBM Smart Archive Solutions

Content Assessment



Tivoli

• Information Governance Optional ECM

Enterprise Records and eDiscovery Analytics

IBM Systems & Storage



(coming soon)



New Content Assessment Capability



Leverage Content Analytics to assess and decide what information to manage, archive, trust and leverage

Decommission unnecessary information (over-retained, irrelevant and duplicated)

Decommission unnecessary contentcentric systems (file shares, SharePoint, PSTs, NSFs, team rooms, laptops) while retaining relevant information









Content Collector Overview Modular and Extensible ... Powered by Unique Task Routing

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Policy &

Task Routing

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Source Connectors

MESSAGING / EMAIL

- Microsoft Exchange / PST
- Lotus Domino / NSF
- LotusLive Notes / LotusLive iNotes
- SMTP
- Instant Messaging (3rd Party)

FILE SYSTEMS

- Microsoft File System
- Desktops (via Tivoli CDP)
- Data ONTAP (NetApp / IBM N series)
- Novell NetWare File System
- Other File Systems

OTHER

- Optim Archive Files¹
- SAP Archive Files
- Microsoft SharePoint
- Lotus Quickr
- IBM Content Integrator
- CMIS
- Tivoli Storage Manager

CUSTOM SOURCES

API Support with SDK

Engine

Task Connectors

INTERNAL TASKS

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

EXTERNAL TASKS

- Records Declaration
- Advanced Context Classification
- Rendering (3rd Party)

CUSTOM TASKS

- API Support / Partner Apps
- Meta Data Enhancement / Cleansing
- Encryption
- System Lookups
- ILOG Rules Engine (or 3rd Party)
- Policy Management

Target Connectors

IBM No.

- FileNet P8
- CM8 (including CM8 z/Linux) New!



- FileNet Image Services
- Tivoli Storage Manager

CUSTOM / OTHER

Microsoft File System



Available now

Future options

Notes:

- 1. This function is via the ICC File System connector
- 2. SAP available as specialized connector
- 3. Lotus Quickr connector available today with ECM services



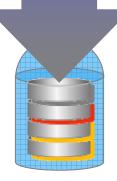
New!



Task Routing Supports More Than Traditional Straight-Through Archiving

Traditional archiving limited to fixed straight-through model

No ability to enhance or extend during archiving process



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

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Task Connectors

Task Routing

INTERNAL TASKS

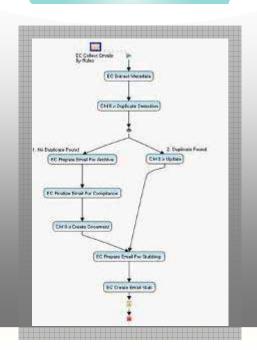
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CUSTOM TASKS

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- Policy Management







Content Assessment and Content Collection

How it Works

New!

Content Analysis and Assessment

- Configure for "in place" exploration and analysis of desired content sources
- Interactively search, mine and explore information to understand relationships and value to business
- Make decisions, build classification models and collection policies for initial cleanup and ongoing management



Continuous Collection and Policy Management

- Setup and manage policies / rules for Sources, Tasks and Targets including de-duplication, records declaration, classification and ongoing monitoring
- Configure and customize Task Routing including meta data enhancement, 3rd party applications, advanced context classification and more



Instant Messaging (3rd Party)

FILE SYSTEMS

- · Microsoft File System
- Desktops (via Tivoli CDP)
- Data ONTAP (NetApo / IBM N series).
- Novell Net/Ware File System

OTHER

- Optim Archive Files¹
- SAP Archive Files²
- Microsoft SharePoint

API Support with SDI-

CUSTOM SOURCES

Task Connectors

INTERNAL TASKS

- . Copy / Move / Delete / Stub
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EXTERNAL TASKS

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- CUST OM TASKS · API Support / Partner Apps
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Content Collection and Archiving Solutions

A family of Content Collection and Archiving offerings and partner solutions based on a modular, extensible architecture that enables organizations to gain control of information growth to better manage, trust and leverage information

- · Reduce storage costs
- Improve production system and backup performance
- · Reduce litigation costs and risks

IBM Content Collector for Email
IBM Content Collector for File Systems
IBM Content Collector for Microsoft SharePoint

More than email

Assess, monitor, identify, and **collect** virtually all content types from all locations including "content in the wild" and existing silo systems

More than archiving

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

More than an isolated solution

Manage content as part of ECM platform (not a silo) to activate content, establish trust and unlock value



Integrated with IBM Optim Data Growth Solution for Unified Data and Content Archiving

Specialty Connectors for SAP Archiving and Document Enabling

IBM Information Archive Support



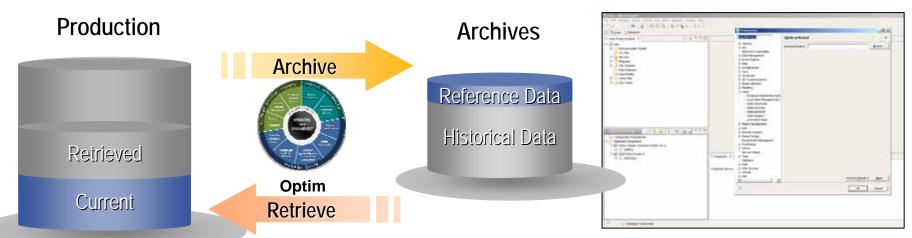
Content Assessment Analytics to Accelerate and Optimise Content Collection Decisions



New

Optim Data Growth Solution

Managing data growth and supporting application consolidation strategies



Manage your enterprise application data

- Archive inactive or infrequently accessed application data according to business policies
- Maintain optimal application performance by controlling ongoing database growth
- Scale archiving capabilities across applications, databases, operating systems and platforms

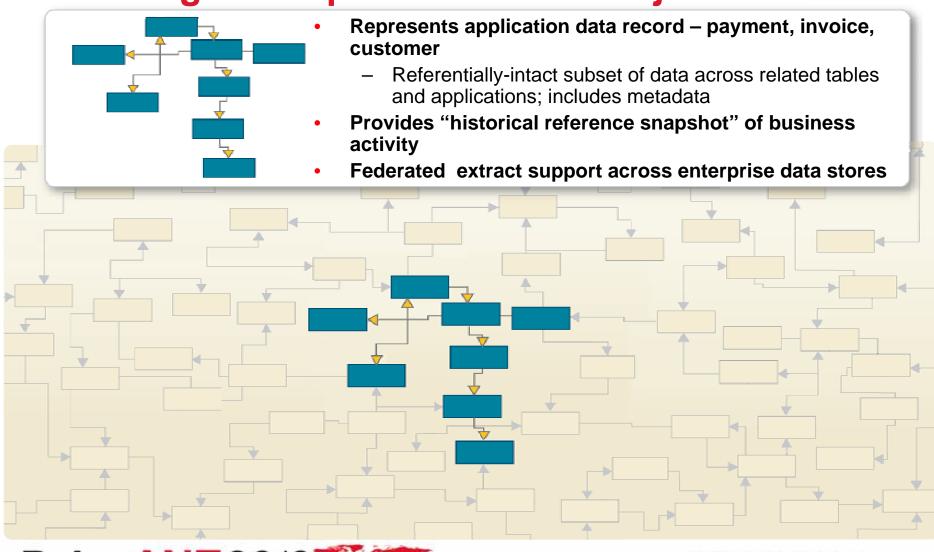
Safely retire legacy & redundant applications

- Archive historical application data when retiring legacy applications or consolidating multiple applications to a single instance
- Retain historical application data in a format that can be accessed independently of the retired/decommissioned application
- Reduce IT infrastructure costs and complexity while reclaiming hardware assets



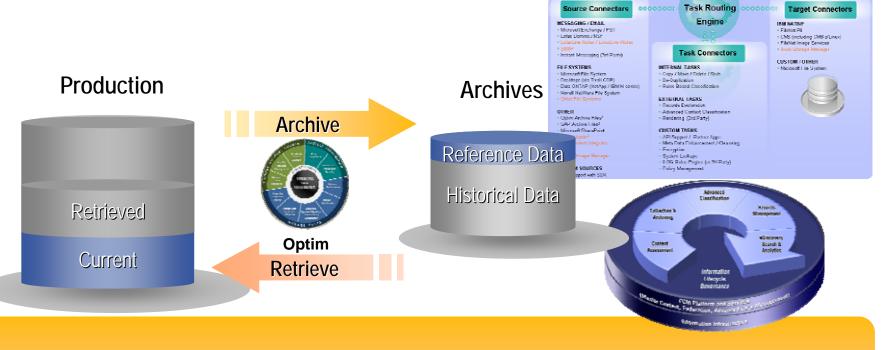


Archiving a Complete Business Object





Smart Archive: OPTIM and ECM joint value proposition



Optim Data Growth Solution

- Complete Business Object provides historical reference snapshot of business activity
- Immutable file format helps enable data retention compliance

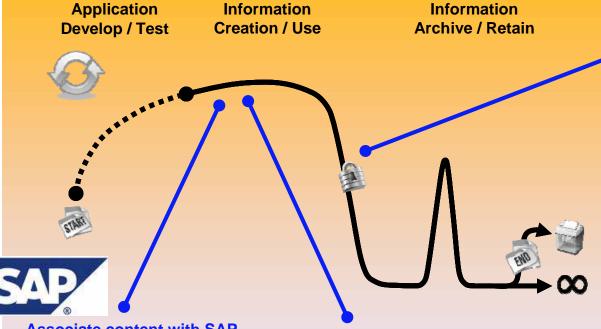
Content Collector and Information Lifecycle Governance

- Provides unstructured information archiving from various data sources, leveraging Content Collector and enabling Information Lifecycle Governance (including Records Management and eDiscovery) for the complete lifecycle of data
- Reduce point solution complexity and costs by providing data and content archiving solutions from a single vendor
- Multiple options exist for ECM and Optim to be used together





Content Collection, Archiving and Compliance Solutions for SAP



Associate content with SAP transactions

- Improves business efficiency by linking all relevant information to SAP
- Enable Information Lifecycle Governance

Complimentary process management

- Augment SAP workflows with contentcentric business processes
- Example: fully automated end-to-end invoice processing reducing invoice cycle times, reducing late payment fees, and improving compliance

Smart Archive of SAP-generated data, content and reports

- Safely offloads data from bloated SAP production systems
- Improves SAP user productivity
- Reduces storage cost, improves system performance
- Enables Information Lifecycle
 Governance of SAP-archived data
- SAP ArchiveLink and SAP NetWeaver ILM certified

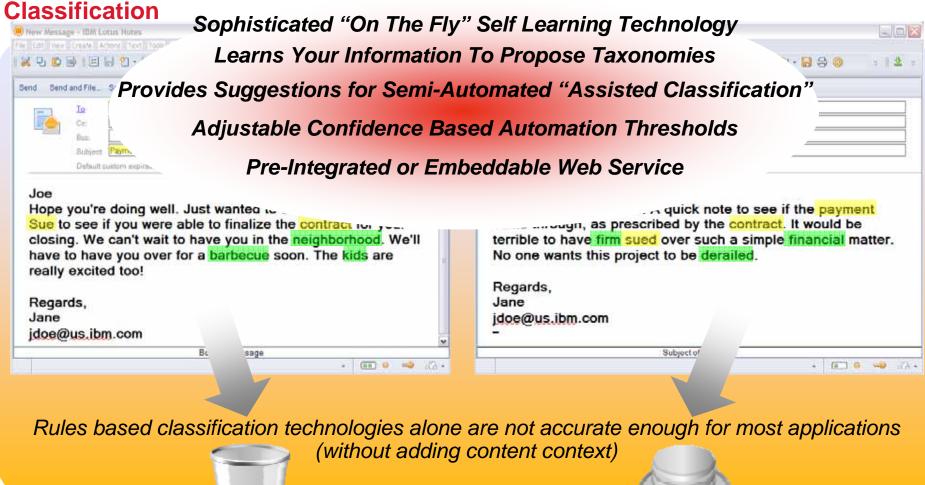






IBM Classification Module

Leveraging the Full Content Context for High Accuracy Advanced





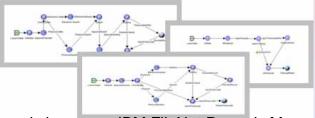


IBM Enterprise Records

Enterprise Electronic and Physical Records Powered by Integrated Process Management

Manage all records regardless of type, media or storage location throughout lifespan that ensures authenticity, reliability, integrity and usability to proactively improve defensibility, lower risks and costs

- Advanced information design, file plan, classification and meta data management including advanced context classification
- Integrated Records Federation Services for repositories
- Complex event and records process maincluding intelligent retention, dynamic les audited disposition management
- Physical records support with real-time audited record process and location tracking
- DoD 5015.02-STD Certified
- Best practice pre-integrated records process templates



* Same product formerly known as IBM FileNet Records Manager or IBM InfoSphere Enterprise Records



20 Million Records Per Day Scalability
Physical Records Integration
Physical to Electronic Conversion
Automated Bulk Operations



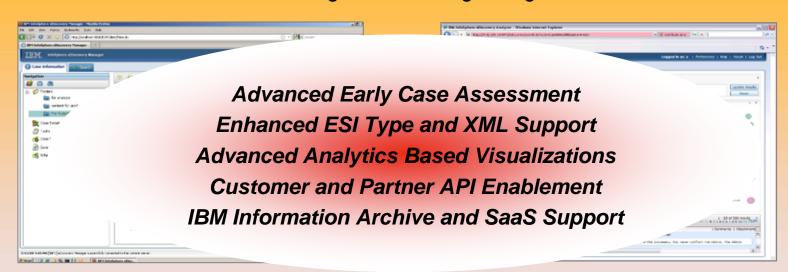
Extend via partner solutions for integrated file room and offsite physical records storage management



IBM eDiscovery Manager & Analyzer

Efficient Litigation Response Enabled by Proactive Information Management

Increase agility, improve defensibility and lower cost of eDiscovery response with targeted 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



IBM Content Collector Discovery Analytics

A bundle that helps you to

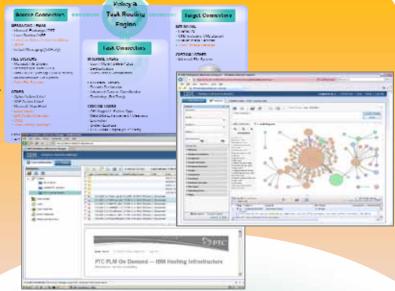
- Intelligently collect and archive various types of content from multiple locations
- Search, cull, hold, and export that content for legal discovery or corporate audits and investigations; all through an easy-to-use, feature rich, Web-based user interface.

Available in a starter pack for departmental or small to medium projects between 250-1400 users.

Consists of:

- IBM Content Collector for Email
- IBM Content Collector for File Systems
- IBM eDiscovery Manager
- IBM eDiscovery Analyzer

Can run on and leverage the power of IBM In Archive which is a universal, scalable, and storage repository for structured and unstrinformation



Starter Pack helps budget-conscious organizations kick off collection and eDiscovery projects for up to 1400 users

Start today, expand tomorrow





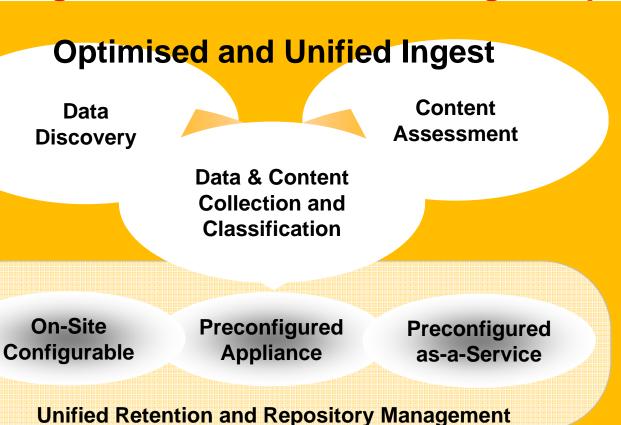
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Reminder: Being Smart Doesn't Mean Being Complicated



Flexible and Secure Infrastructure

Integrated Compliance, Analytics and eDiscovery ...
Value Added Services



Learn More!

IBM Smart Archive

-http://www.ibm.com/smartarchive



www.ibm.com/software/ecm/smartarc hive





IBM Smart Archive Strategy

IBM now delivers the industry's most comprehensive set of specific solutions in a unified, integrated and coherent information aware strategy that maximizes customer value

Wikibon ... "IBM with their Smart Archive strategy has demonstrated sorely needed leadership. They've made a concentrated effort to "harmonize" across hardware, software, services and best practices to help customers achieve true information governance."

Gary MacFadden, Principal Research Contributor for Wikibon

Forrester ... "..the vision that IBM outlines in this announcement is strategically compelling."

Brian W. Hill, IBM Gets Smart With Its Archiving Strategy, http://blogs.forrester.com/brian_hill/09-10-27-ibm_gets_smart_its_archiving_strategy, 27 Oct 2009





Questions?





IBM Business Value Assessment Process

Methodology

- ✓ Focuses on hard-dollar savings
- ✓ Prioritizes benefit areas

Scope

✓ Environments Analyzed: SharePoint, Email, File Shares, Mainframe Apps, SAP, Siebel EU, Hyperion, Manugistics or more

Process

- ✓ Employee, stakeholder interviews by IBM consultants
- ✓ Analyzes business partner reports
- ✓ Validates assumptions and results with Stakeholders
- ✓ Uses IBM tools for cost savings, modeling, analysis and software configuration

Sample Executive Dashboard

