IBM Smart Archive
Vision and Strategy

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Information Management
IBM Software Group Asean

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**
- **Existing and New Solutions Being Announced**
- **Clients who support the IBM Smart Archive Approach**
- **Why IBM**

INFORMATION-LED TRANSFORMATION   LEAD THE WAY

Growth for People and Databases - Similarities

- People: **Without a proper diet and regular exercise routine, people tend to perform more slowly.**

- Databases: **Without maintaining capacity controls on your database, its processing slows down.**

- People: **Weight gain requires people to invest in a new wardrobe.**

- Databases: **Database growth requires organizations to purchase new storage.**

- People: **Gaining weight can lead to health risks.**

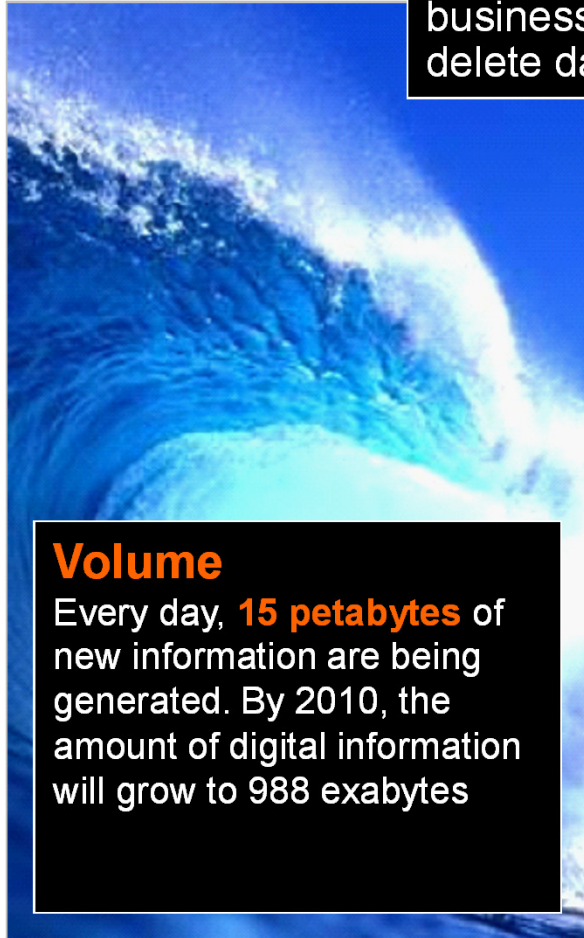- Databases: **Increasing in size can leads to Discovery and Compliance risks.**

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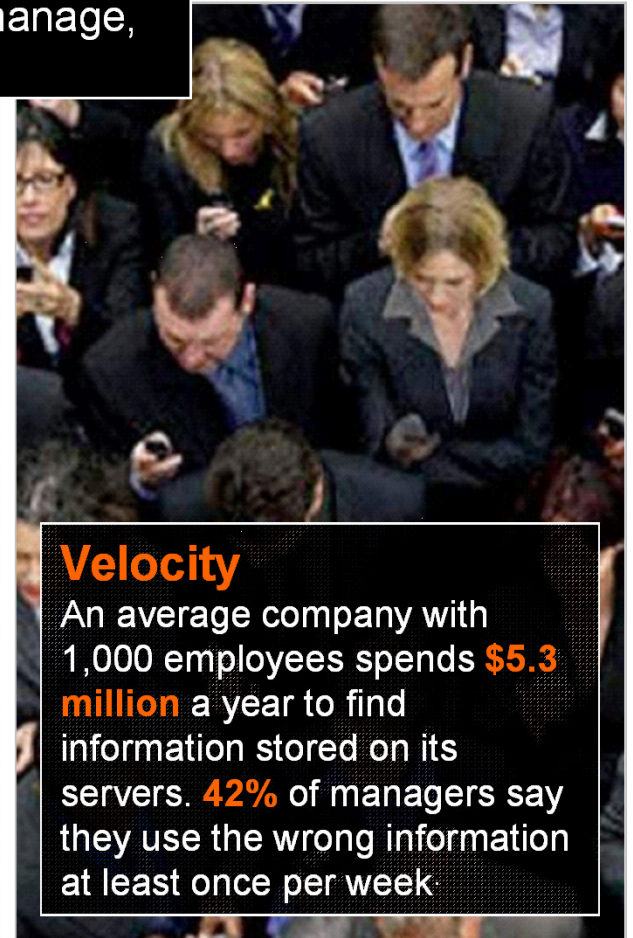
Volume
Every day, **15 petabytes** of new information are being generated. By 2010, the amount of digital information will grow to 988 exabytes

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

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

The keep everything forever model has failed

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

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

**Inability to produce
critical information
er punitive scenarios
and deadlines**

No Longer an Option … Archiving is Now a Mandate … Requiring a Smarter Approach Beyond Point Solution Limitations and Costs

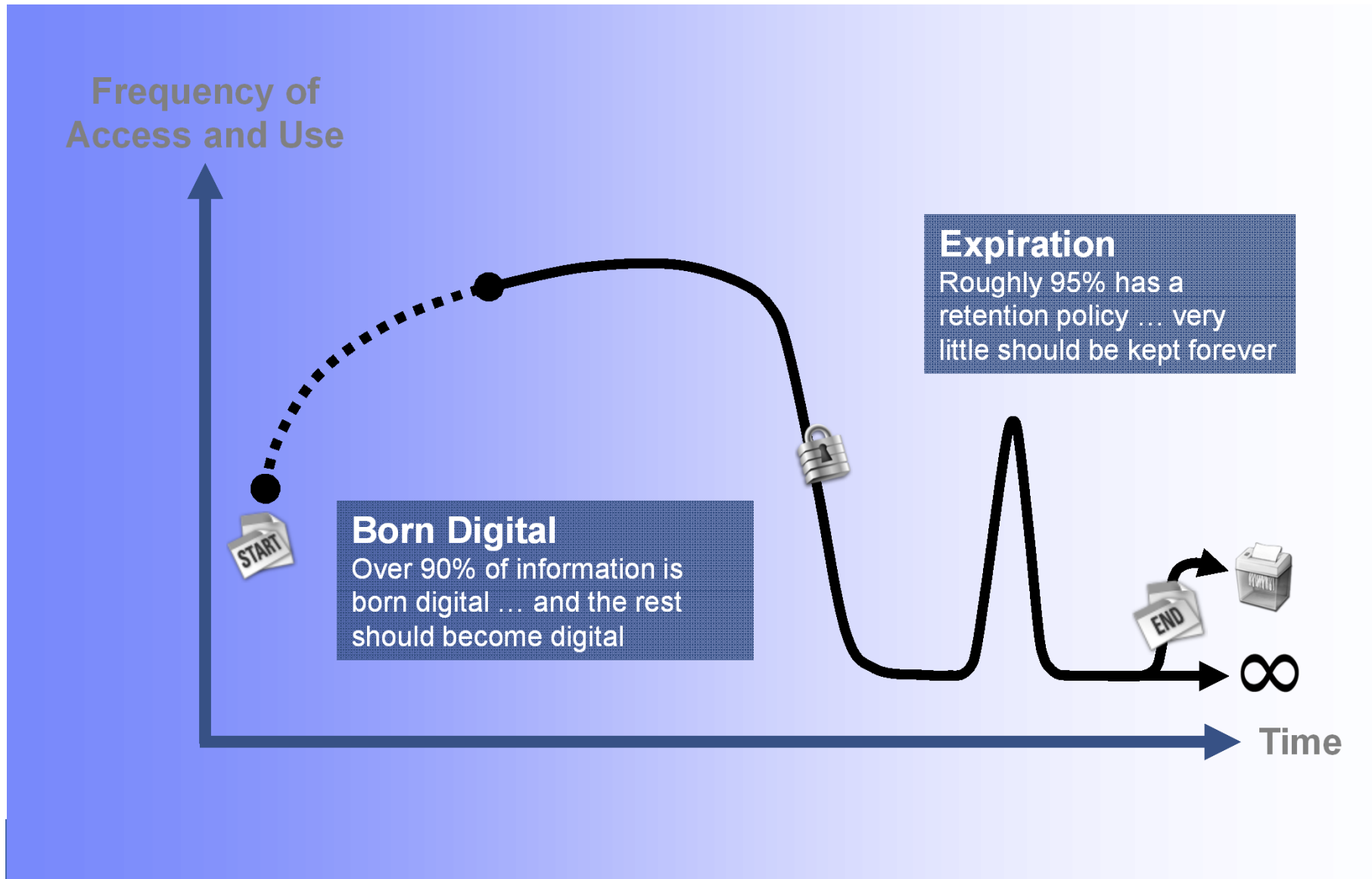**I need to understand what I have and why … to make it easier to manage, archive, trust and leverage**

I need to reduce my costs, decrease complexity while increasing flexibility

I still need to comply, govern and produce information … and I need better overall protection

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Information Has a Lifespan Requiring Disposition

Frequency of Access and Use

Expiration
Roughly 95% has a retention policy … very little should be kept forever

Born Digital
Over 90% of information is born digital … and the rest should become digital

START

END

Time

∞

A Global Insurer's Perspective … Information Rabbits
User controlled information proliferates faster than

SOLVED
Reduced Email Storage by 80%

Original Email and Attachment

Forwarded, copied and stored by users on average **12** times

Backed-up multiple times (daily, weekly, monthly) to create as many as **121** copies … not indexed or searchable

- Slows down production systems
- Increases storage and eDiscovery costs
- Creates litigation risks

- Not adequate for archiving or eDiscovery
- Longer backup and restore times
- Increases power and space requirements
- Significantly magnifies legal risks and costs
- Propagates "keep everything forever" models

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Database Multiplier Effect
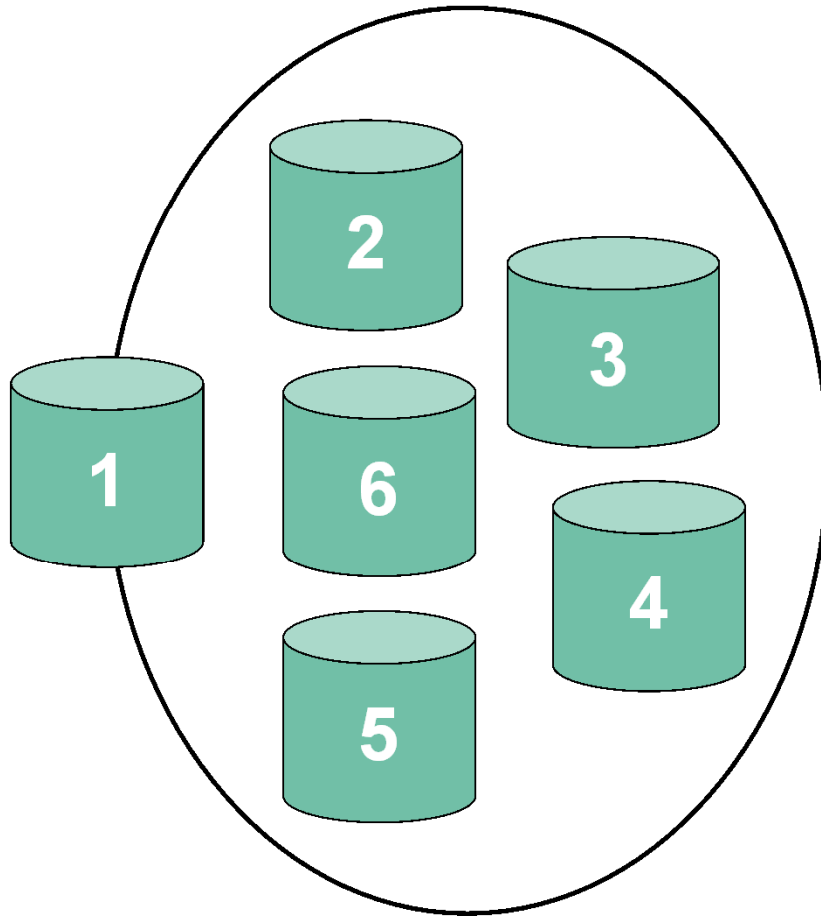
Production	**200 GB**
Backup	**200**
Disaster Recovery	**200**
Development	200
Test	200
Quality Control	200
Total Size	**1200 GB**

It Doesn't Take Magic To Reduce Costs

Identify & Decommission

Over-Retained Irrelevant Duplicated

Optimize Both Layers

Storage De-Duplication is Part of the Answer

NOT Necessary To Keep

Necessary to Keep

Information Layer

- Content Assessment Analytics
- Data Discovery
- Classification
- De-Duplication
- Records and Retention

Active Storage

Storage Layer

- Compressed
- De-Duplication
- Retention

Tiered Storage

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Bringing Total IBM Value to Our Archiving Clients
Optimizing The Archiving Process and Infrastructure
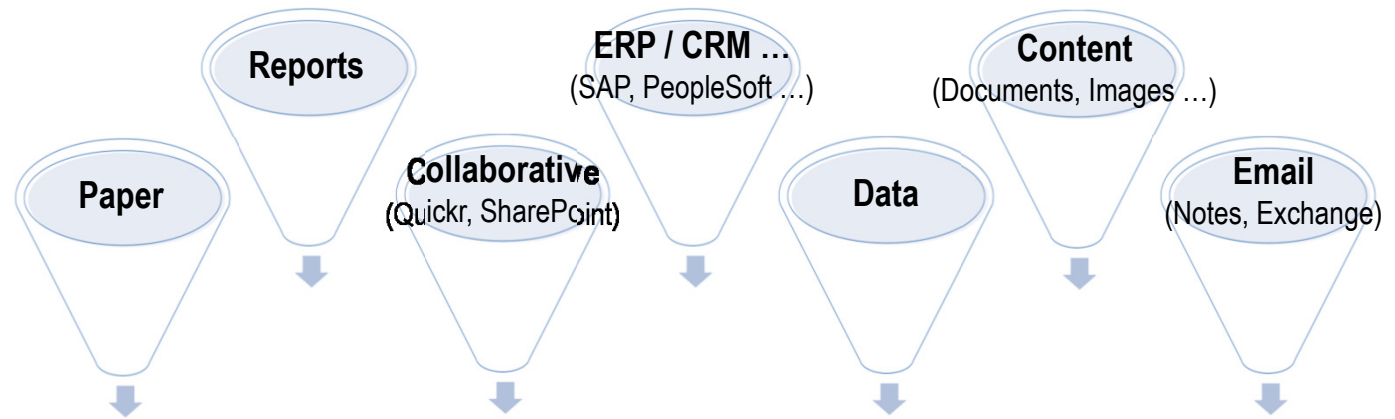
Uncontrolled
Data and Content
Poor Meta Data

Organized / Retained
Unified Collection and Classification
Flexible and Secure Infrastructure
Unified Retention and Protection

Optimized eDiscovery
Integrated Compliance
Records Management
Data and Content Analytics

Web · SharePoint · File Systems
ERP Systems · Legacy Systems
Desktops · eMail Systems

Policy Management
Choice of Repository
Storage Management

Legal & Business Users

Aggregate
Leveraging Context Through Analytics

Leverage
Streamline Legal Discovery Processes

Smart Archive

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IBM Smart Archive Strategy

Reports

ERP / CRM …
(SAP, PeopleSoft …)

Content
(Documents, Images …)

Paper

Collaborative
(Quickr, SharePoint)

Data

Email
(Notes, Exchange)

Optimized and Unified Assessment, Collection and Classification

Value Added Services
- Optimization Services
- System Services
- Managed Services
- Reference Architecture
- Information Governance

**Flexible and Secure Infrastructure with
Unified Retention and Protection**

On Premise
(Custom Config)

Appliance
(Pre-Config)

As A Service
(SaaS, Multiple Options)

**Cloud Ready Archive
Storage with
Optional ECM**

Integrated Compliance, Records Management, Analytics and eDiscovery

INFORMATION-LED TRANSFORMATION LEAD THE WAY
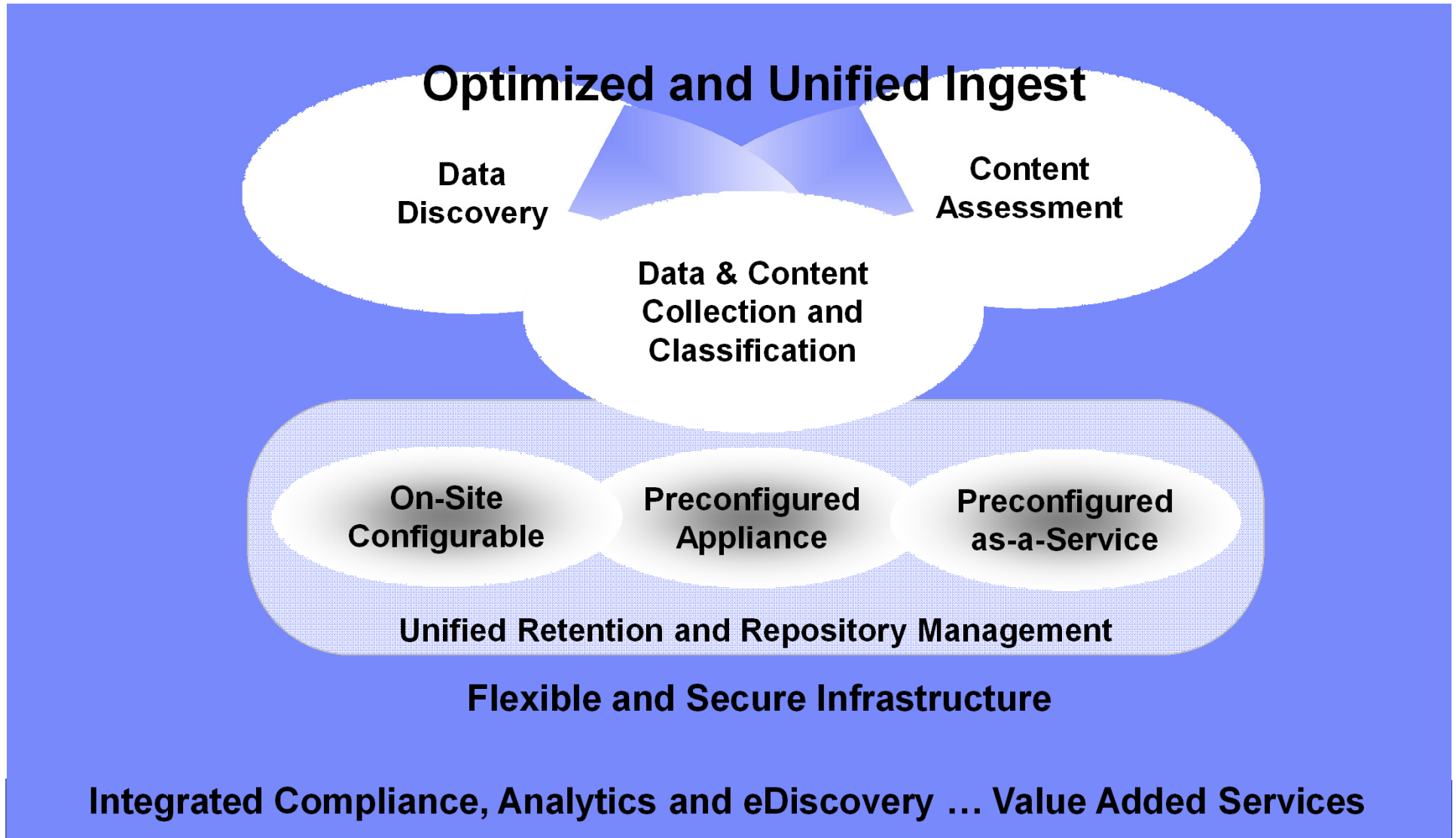
Being Smart Means Saving Money and Optimizing Your Infrastructure

An independent study shows $35.6M of storage savings based on principles of IBM's Smart Archive Strategy

Using Optim, Safeco reduced monthly CPU usage by 20 to 25 percent and lowered IT costs to business units

A large commercial bank is realizing a $36M ROI by not printing digital born content and using IBM ECM to manage it

Germany Insurance company Deutscher Ring reduces processing costs by one third and improves SAP software response times 40%

"We are capable of accomplishing in days what the defendant didn't accomplish in two years"

Michele Martin, Counsel, Smith, Gambrell & Russell, LLP

National Library of Netherlands saves an estimated $5M per year by avoiding manual cataloging and storing

Realize an estimated TCO savings of up to 40% by leveraging GTS managed services for Information Protection Services

A major automotive manufacturer reduces email storage by 50% while enabling rapid search and analysis of e-mails for legal discovery
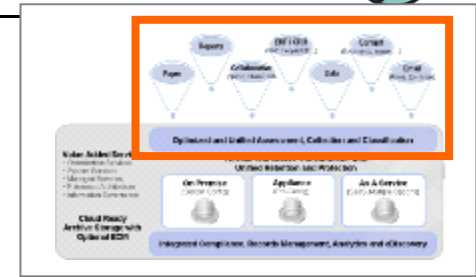
A global manufacturing company archives 30,000 emails a day into IBM DR550 storage system to address a 10 year retention mandate

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Exactly where is your information … how do you value it?

How do you know what to archive beyond the active and inactive paradigm?

Bloated Production Systems with Inefficient Storage

Content In The Wild

Lost, Duplicate and Obsolete Data

Ability to Discover, Assess and Decide What Information to Archive, Trust and Leverage

Decommission Unnecessary Information and Systems

Determine Valued, High-Risk and Compliant Information

Unified Collection and Classification
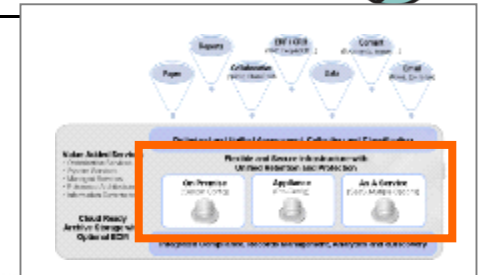
Unified data and content technologies and policies for information management and archiving

Enhance with Trusted Meta Data

Manage and archive with trusted meta data by leveraging task routing and Master Data Management

How do you manage information over its lifespan?

Is your infrastructure simplified, flexible, adaptable, information aware and cost-optimized?

Policy Harmony

Policy cooperation and enforcement of retention, legal holds and disposition between layers

Choice Based Management

ECM based, Device based or both for management of de-duplication and other services

Govern Information Over Time Based on Business Value

Paper, Data and Content

Dynamic Infrastructure

Enhanced tamper proof options with integrated HSM, disk and tape storage

Flexible Deployment

On-premise custom, integrated appliance, SaaS, cloud and hybrid options

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WAY

Are you enabling Compliance and Governance in a consistent, defensible and cost effective manner?

Is everything secure, protected, optimized and auditable?
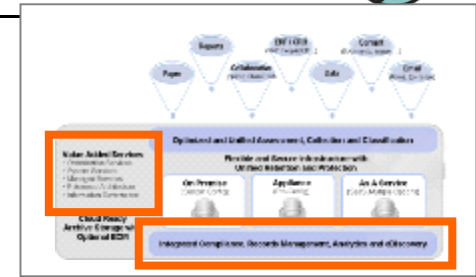
Business Analytics and Optimization

Policy development, analytics and optimization services
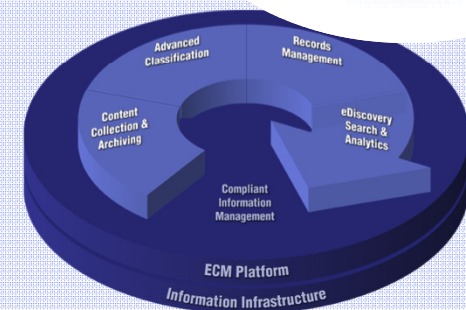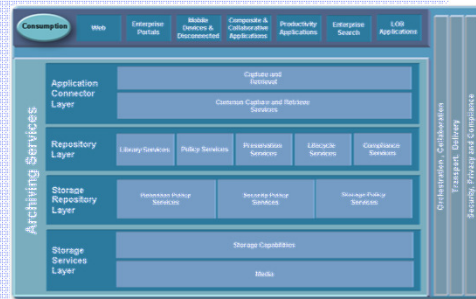
Archive and Storage Services

Complete system services from assessment through optimization with Reference Architecture

Managed Services

Email protection, availability and disaster recovery
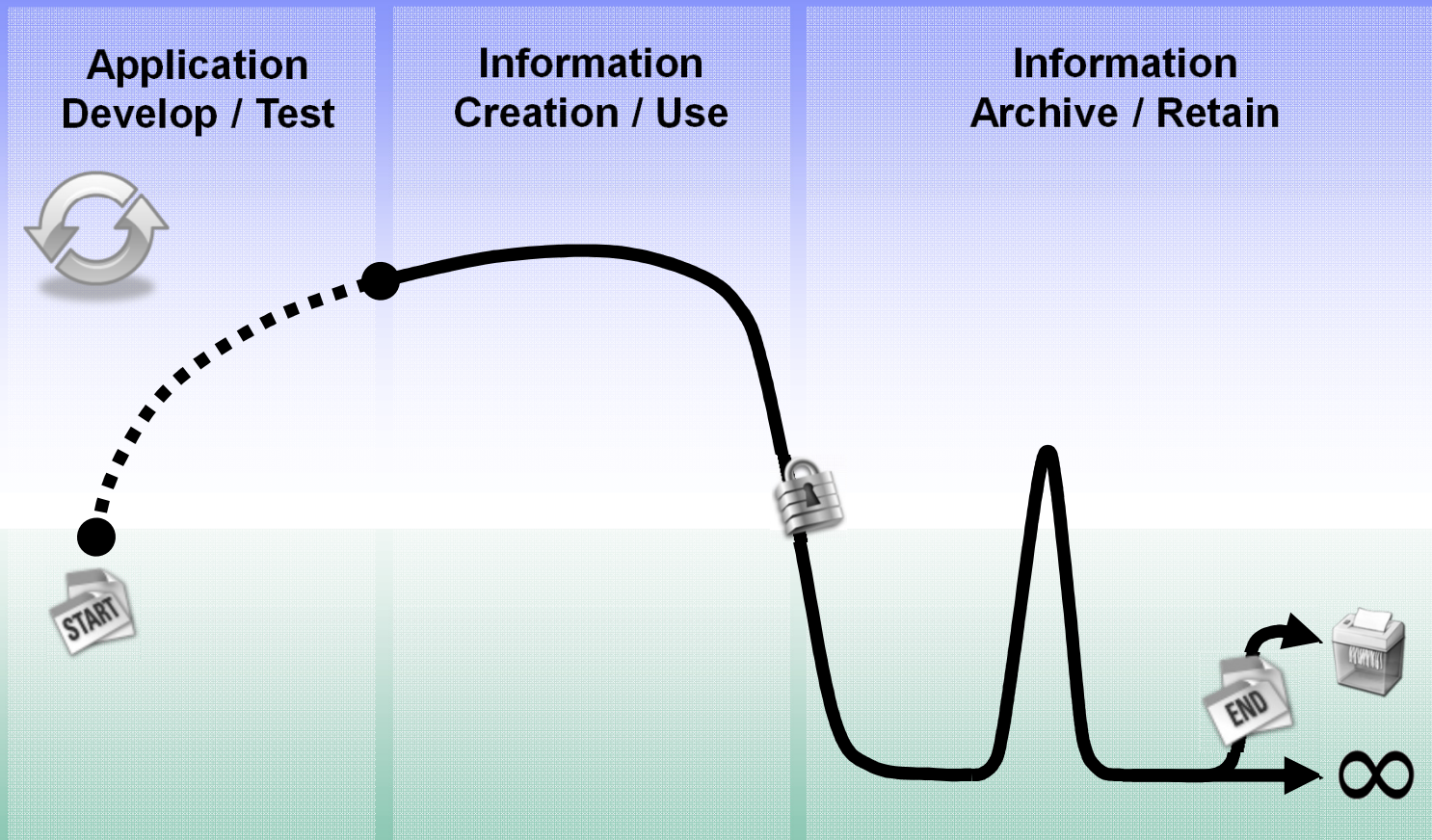
Compliant Information Management

Integrated records management and eDiscovery solutions

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Information Value to Business

Application Develop / Test	Information Creation / Use	Information Archive / Retain

START

END

∞

Information Infrastructure

Information Value and Obligations

Business need, relevance and usage combined with compliance and legal obligations determine how long information must be retained and governed

Optimize storage infrastructure based on business context of usage, not just frequency of access throughout the lifespan

Infrastructure

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Beyond Frequency of Access
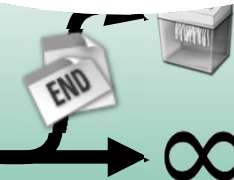## Key Concepts To Optimize Information and Infrastructure Layers

Information Value and Obligations

Decommission unnecessary
information to optimize
production systems
and reduce storage costs

Leverage information layer
trusted meta data,
classification and analytics
within infrastructure to
optimize retrieval and
reduce complexity

Enforce retention
to reduce costs
and legal risks … leverage
trusted meta data and
analytics to optimize
eDiscovery

START

Decommission and archive
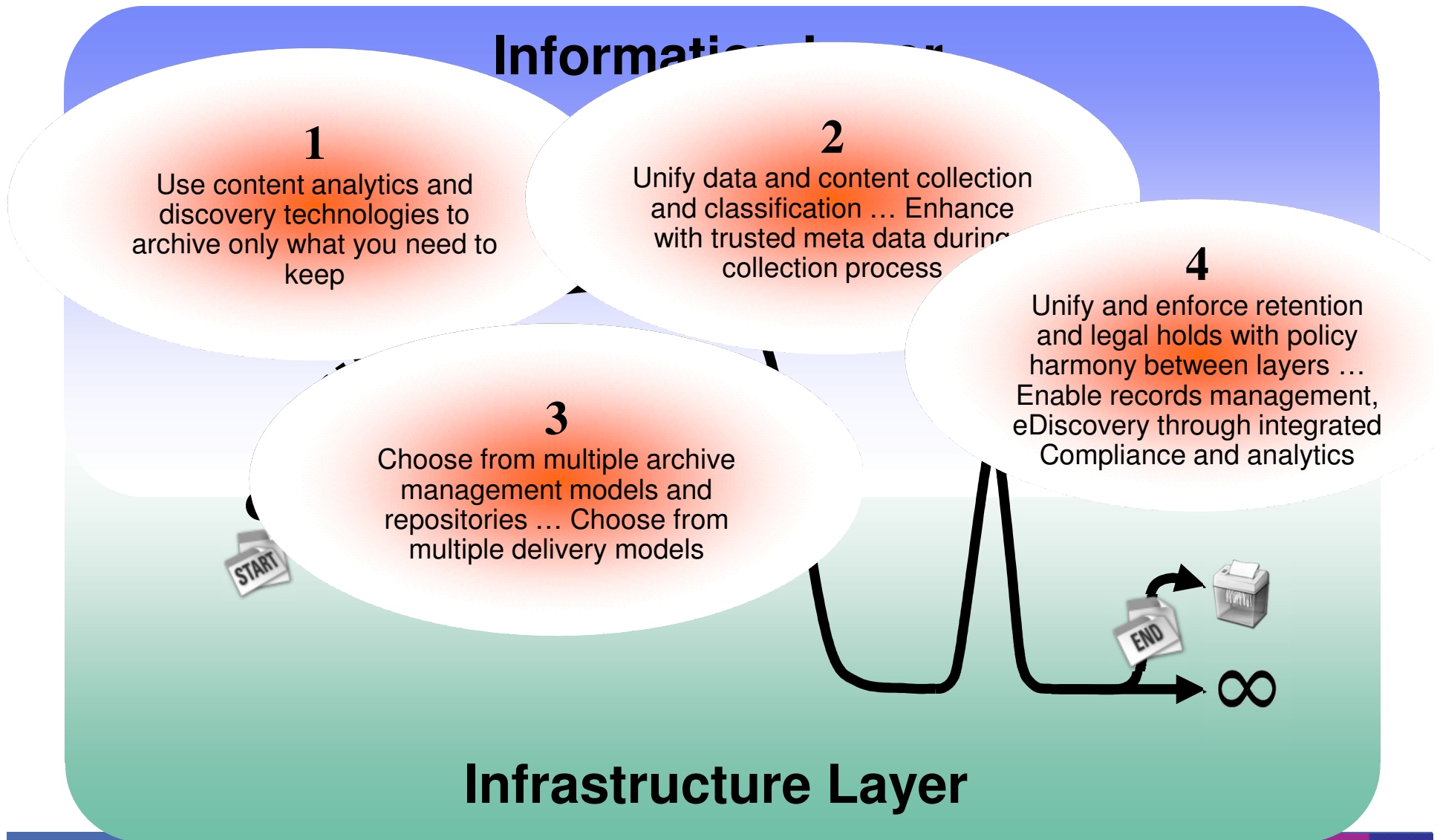outdated applications
and test data to
reduce costs

END

∞

Information Infrastructure

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Reminder: Being Smart Doesn't Mean Being Complicated

Information Layer

1
Use content analytics and discovery technologies to archive only what you need to keep

2
Unify data and content collection and classification … Enhance with trusted meta data during collection process

4
Unify and enforce retention and legal holds with policy harmony between layers … Enable records management, eDiscovery through integrated Compliance and analytics

3
Choose from multiple archive management models and repositories … Choose from multiple delivery models

START

END

∞

Infrastructure Layer

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The **Smart Archive** Modular Yet Integrated Approach Enables Multiple Choice Models (and is Cloud Ready)

	Optimized and Unified Ingest	Flexible and Secure Infrastructure	Integrated Compliance, Analytics and eDiscovery
Integrated Software Solution Capabilities	• Information discovery and assessment model for structured and unstructured • Common collection (ingest) engine and policy management for data and content • Support for specialty or custom ingest (video, medical, etc)	• Choice of management model including repository, storage, HSM, retention, policy management, de-dupe, migration and long-term preservation capabilities • Full support for all ECM capabilities including BPM enabled access to archives • SaaS Delivery Option	• Compliant Information Management (CIM) - Advanced Classification, Records Management, eDiscovery • Federated search and retrieval • Content analytics • Trusted meta data
Integrated Hardware Capabilities	• Standards based interface - allows for choice of ingestion • Support for specialty or custom ingest (video, medical, etc) • Choice of up to 3 collections (virtual repositories) each with different policies	• Choice of management model including repository, storage, HSM, retention, search, policy management, de-dupe, migration and long-term preservation capabilities • Integrated Disk Storage: low cost, de-dupe, high performance, ultra dense, compliance modes • Integrated Tape Storage: high density, high capacity, encryption, WORM	• Support for CIM and other value added capabilities • Policy Harmony: Unified retention and legal hold enforcement • Compliance-enabling infrastructure with Enhanced Tamper Proof • Support for Flexible and adaptable protection levels: basic, med, max
Value Added Services	• System Services: Assessment, Design, Delivery and Optimization • Reference Architecture • Managed Services: Email Protection, Availability and Disaster Recovery	• System Services: Assessment, Design, Delivery and Optimization • Reference Architecture • Managed Services: Email Protection, Availability and Disaster Recovery	• Industry specific policy development including inventory of obligations • System Services: Assessment, Design, Delivery and Optimization • Reference Architecture
Partner Solutions	• Support via API and existing channels • Value added solutions and services	• Support via API and existing channels • Value added solutions and services	• Support via API and existing channels • Value added solutions and services

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How IBM is Innovating Together on Smart Archive

Software

Systems

Services

- Linking a deeper understanding of information to the infrastructure thru discovery and content assessment analytics

- Unified content and data archiving through common collection and classification technologies with integrated records management and eDiscovery analytics

- Choice of management models at both information and storage layers including de-duplication and retention with policy harmony and enhanced tamper proof capabilities
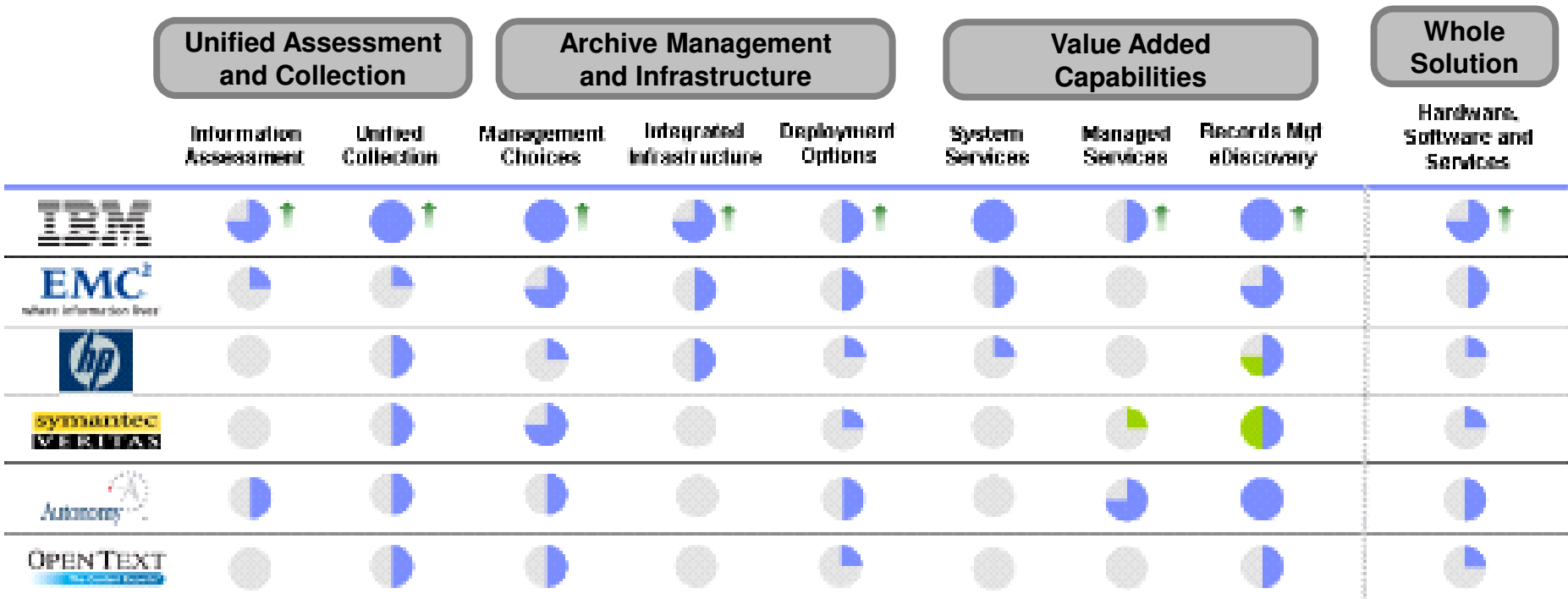
- Choice of pre-integrated and pre-configured delivery options including traditional on-premise software, preconfigured appliance, software-as-a-service, cloud ready and hybrid options

- Complete value added services from policy development through business and storage optimization

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

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Integrated IBM Archiving Solutions
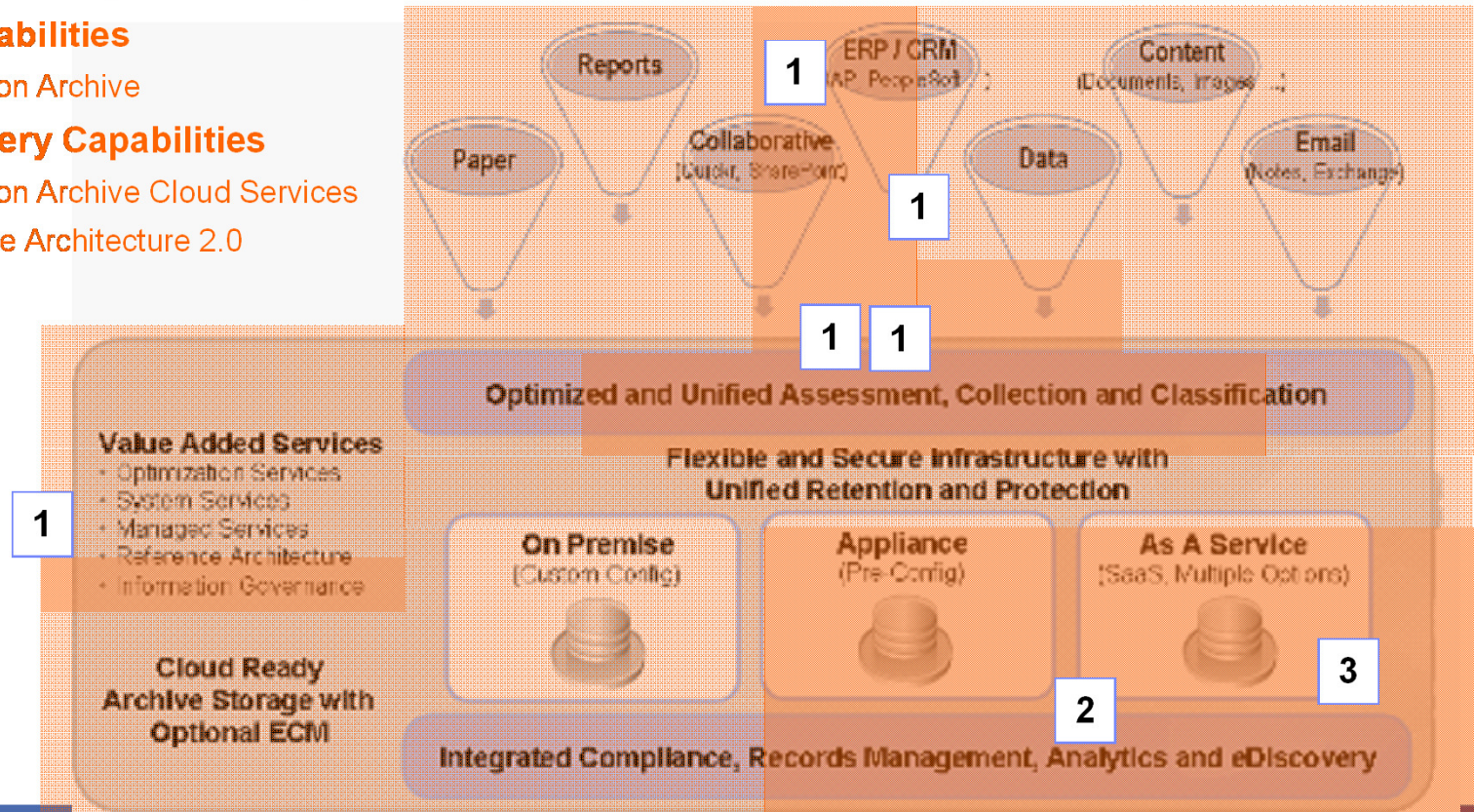
1. Software Capabilities

- IBM InfoSphere Content Collector w/ Content Assessment
- IBM InfoSphere Content Collector w/ Optim Integration
- IBM InfoSphere Content Collector for SharePoint / SAP Support
- IBM InfoSphere Discovery w/ Optim Data Growth Solution
- IBM InfoSphere Enterprise Records, Classification and eDiscovery

2. Hardware Capabilities

- IBM Information Archive

3. Services Delivery Capabilities

- IBM Information Archive Cloud Services
- IBM Reference Architecture 2.0

Reports

ERP / CRM
(SAP, PeopleSoft ...)

Content
(Documents, Images ...)

Paper

Collaborative
(Quickr, SharePoint)

Data

Email
(Notes, Exchange)

Optimized and Unified Assessment, Collection and Classification

Value Added Services
- Optimization Services
- System Services
- Managed Services
- Reference Architecture
- Information Governance

Flexible and Secure Infrastructure with
Unified Retention and Protection

On Premise
(Custom Config)

Appliance
(Pre-Config)

As A Service
(SaaS, Multiple Options)

Cloud Ready
Archive Storage with
Optional ECM

Integrated Compliance, Records Management, Analytics and eDiscovery

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Existing and New Solutions Being Announced

New!

New Software Capabilities

Content Assessment Analytics to Accelerate and Optimize Content Collection

IBM InfoSphere Content Collector w/ Optim Integration

IBM InfoSphere Content Collector for SharePoint / SAP Support

InfoSphere Discovery w/ Optim Data Growth Solution

InfoSphere Enterprise Records and eDiscovery

New Hardware Capabilities

IBM Information Archive

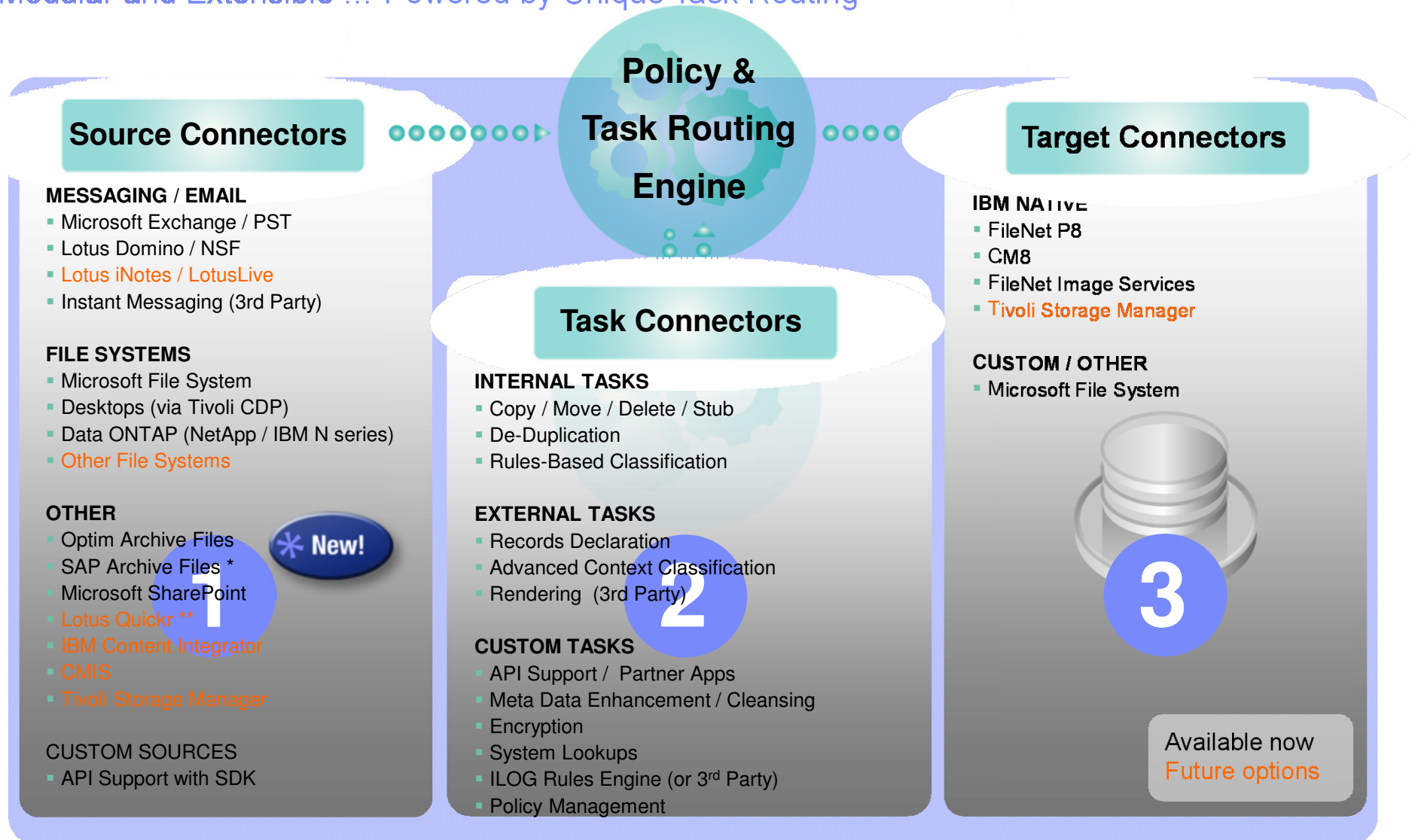**New Services**

Information Archive (SaaS) Service

IBM Reference Architecture 2.0

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

Policy & Task Routing Engine

Source Connectors

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

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

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

CUSTOM SOURCES
- API Support with SDK

New!

1

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

2

### Target Connectors

IBM NATIVE
- FileNet P8
- CM8
- FileNet Image Services
- Tivoli Storage Manager

CUSTOM / OTHER
- Microsoft File System

3

Available now
Future options

* SAP available as specialized connector
** Lotus Quickr connector available today with ECM services

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Supports More Than Traditional Straight-Through Archiving

Traditional archiving limited to fixed straight-through model

No ability to enhance or extend during archiving process
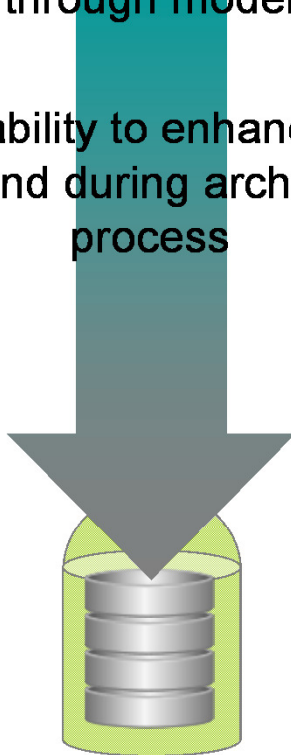
Content Collector Task Routing Architecture enables flexible routing or processing of internal, external and custom instructions (tasks)

Task Connectors

Task Routing

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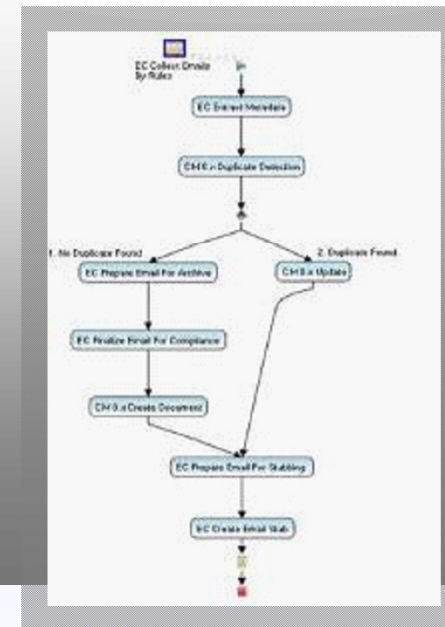
New Content Assessment Capability   *New!*

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 content-centric systems (file shares, SharePoint, PSTs, NSFs, team rooms, laptops) while retaining relevant information
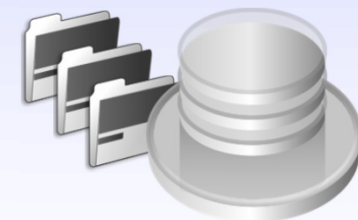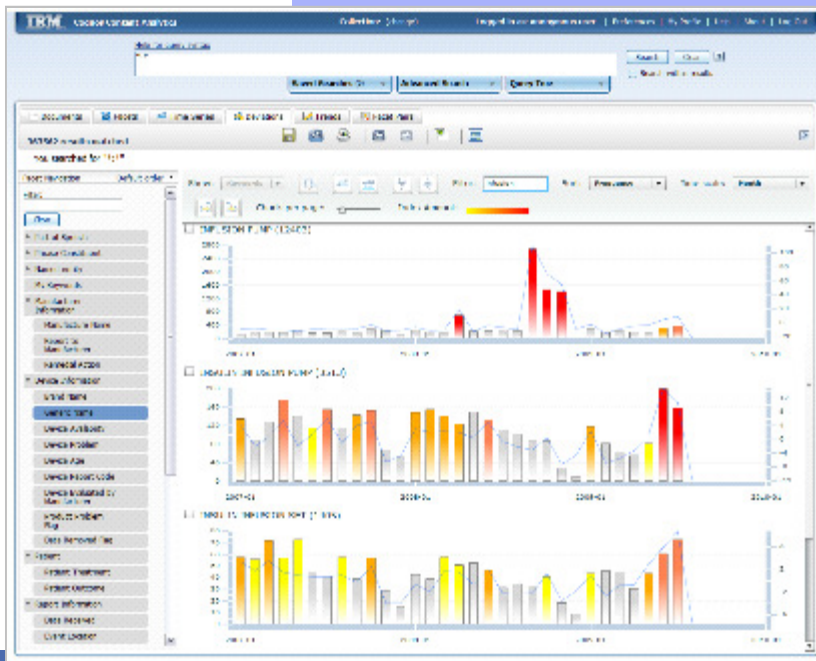
Content Assessment Analytics and Content Collection
## How it Works

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
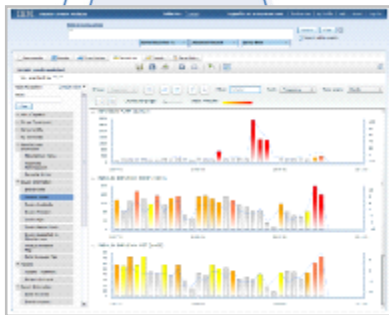
Continuous Collection and Policy Management

- 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
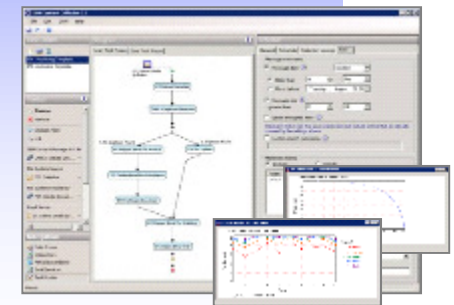
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- Policy Management

CUSTOM / OTHER
- Microsoft File System

New!

INFORMATION-LED TRANSFORMATION — LEAD THE WAY

# InfoSphere 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 InfoSphere Content Collector for Email

IBM InfoSphere Content Collector for File Systems

IBM InfoSphere Content Collector for Microsoft SharePoint
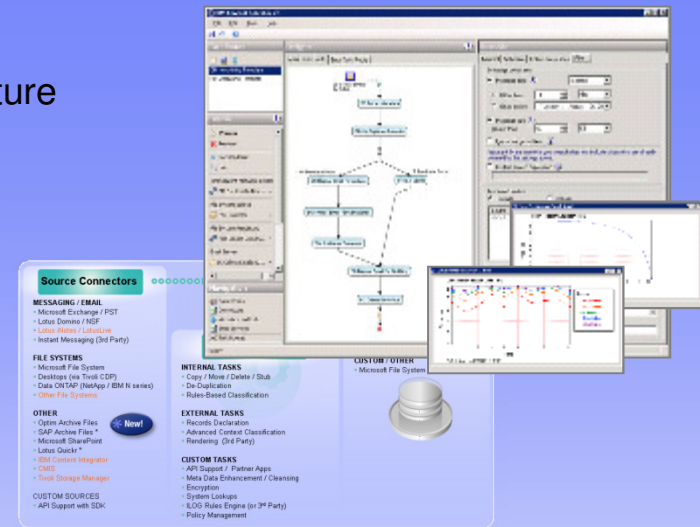
More than email

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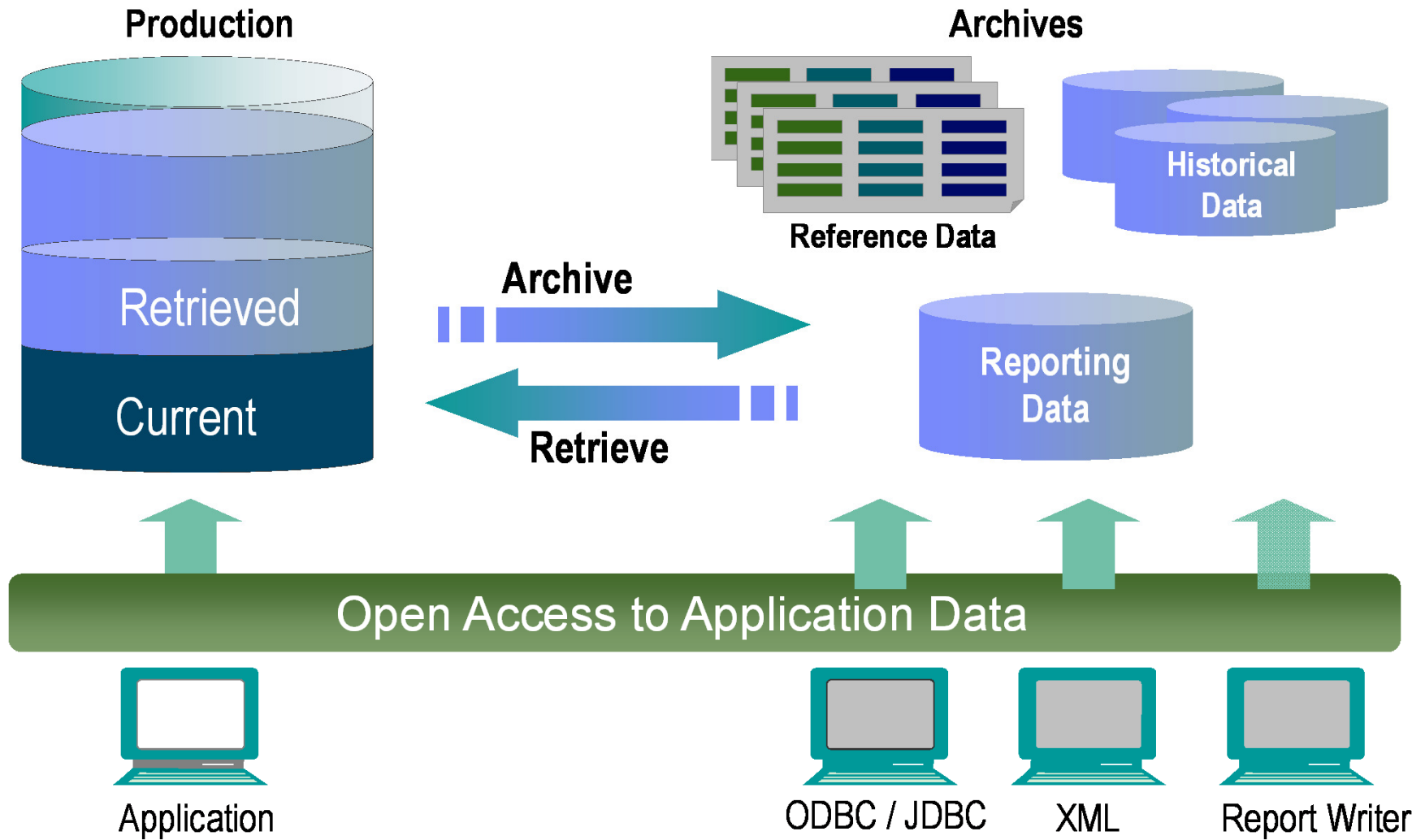
More than archiving

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
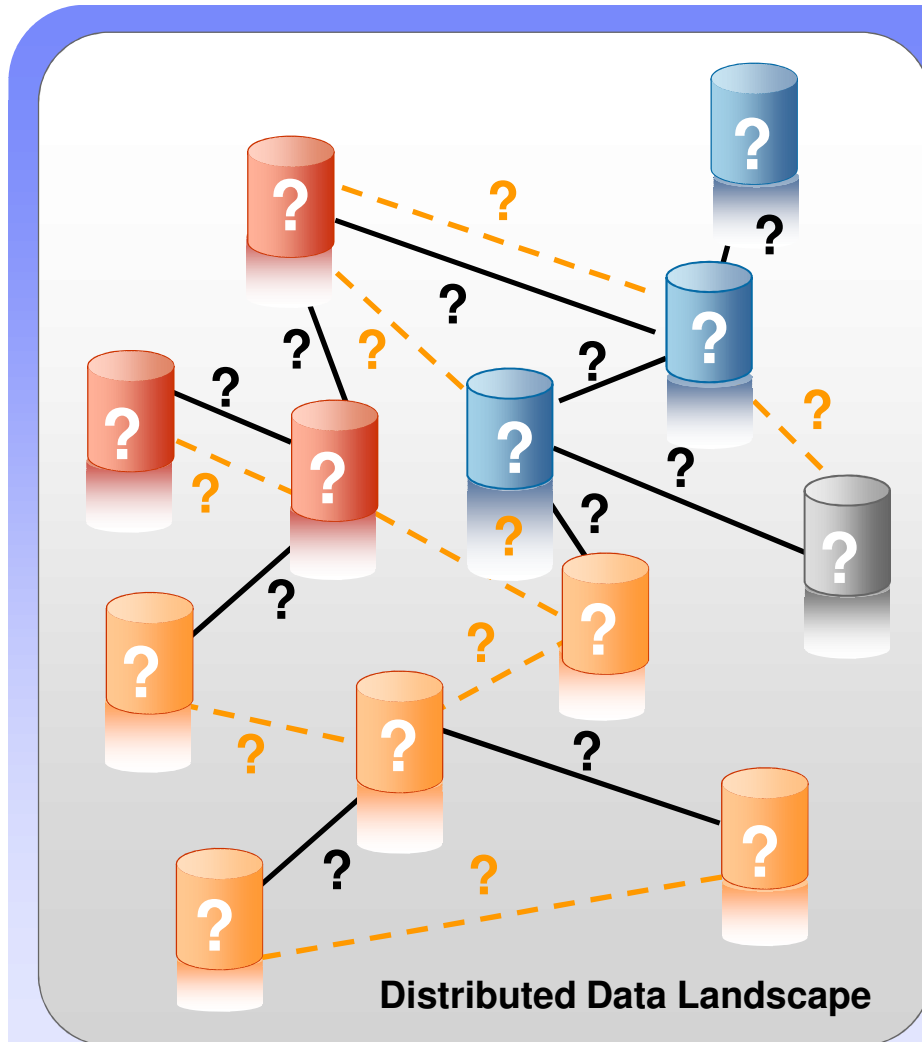
INFORMATION-LED TRANSFORMATION — LEAD THE WAY

You Can't Manage or Archive What You Don't Understand

Distributed Data Landscape

Highly distributed
- Multiple applications, databases and platforms

Complex, poorly documented data relationships
- Which data should be archived and/or disposed of ?
- Which clients are eligible for the new sales promotion?
- Which version of the data should we use for the ERP consolidation?

Relationships not understood because:
- Corporate memory is poor
- Documentation is poor or nonexistent
- Logical relationships (enforced through application logic or business rules) are *hidden*

INFORMATION-LED TRANSFORMATION   LEAD THE WAY

IBM InfoSphere Discovery
Understand Your Distributed Data Landscape

✳ New!

Automates analysis of data and data relationships for complete understanding of data assets for archiving, retention and other applications

- More accurately discover and determine relevant data to be archived and retained
- Identifies the relationships that link data elements into a "business object" within a source (customer, counterparty, invoice)
- Identifies the complex logic that relates business objects across multiple sources

Enhanced with Optim Data Growth Solution

TRANSFORMATION THE WAY
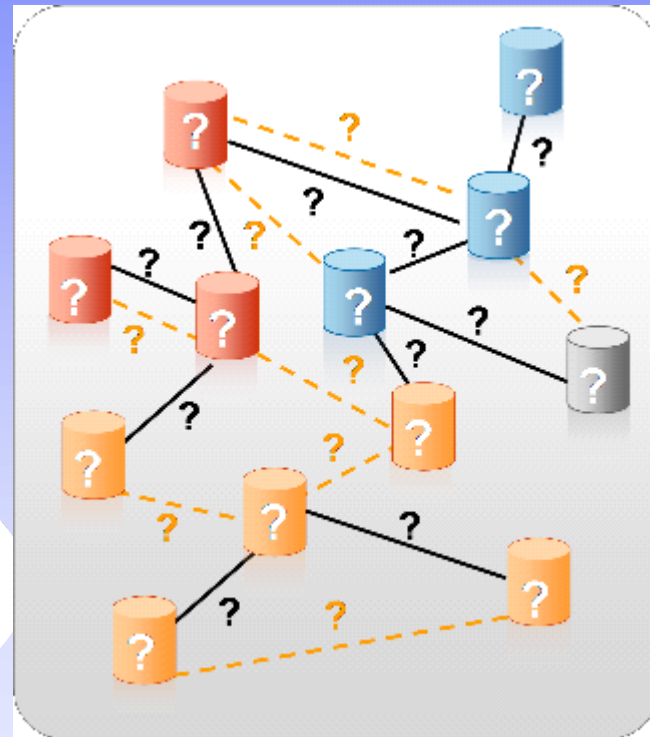
French National Railroad (Societe Nationale de Chemin de Fers)   SNCF

Challenge

- SNCF has historical transactional ticket databases, file shares of related content (mail, invoices, orders, office documents), and other financial systems that are growing and unmanaged.

- Currently unable to address multiple compliance requirements around:

  - Financial reporting Read-Only Storage of Archived Data

  - Records Retention & Management

- Difficult to find all pieces related to a ticket transaction.

  - Stored in multiple places, manual process to find and retrieve.

Solution

- IBM Optim™ Data Growth

- IBM Content Collector for File Systems

- IBM FileNet Content Manger

- IBM FileNet Records Manager

- IBM FileNet eForms

SNCF Needs:

- Global Unified Archiving Solution of structured data and unstructured content through a common ingest and processing model.

- A common policy and software solution for Records retention and management

- Ability to decommission legacy databases and fileshares

- Reduce database back-up and restore; optimize production servers and storage capacity.

- Improve ability to meet Compliance demands for finance and railway transportation authorities.

- Single, easy-to-use retrieval interface for ticket sale transactions and all related documents for a customer trip, for over a thousand SNCF authorized users.

SNCF needed a unified solution, with a common records management policy and record retrieval capability, to manage and archive both structured data as well as unstructured content (such as documents, email, invoices and orders). The IBM strategy for unified archiving fits SNCF's requirements, and therefore SNCF selected IBM solutions including Optim, Content Collector, FileNet, FileNet P8 and eForms. We expect that the IBM solution will yield significant cost savings and increase compliance.

Pascal Leborgne - Project Manager

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Thomas Miller Group

THOMAS MILLER

Challenge

- Industry and government regulations and legal discovery drove the need for a more effective method of managing, retaining and producing electronic information in a timely manner.

Solution

- IBM Business Partner, Neocol, implemented the IBM eDiscovery solution on the existing Wintel architecture and installed a separate 3.3 TB disk array

- IBM eDiscovery provides search, legal hold, and export of case-relevant archived email for discovery purposes

- IBM Content Manager manages all e-mail content across multiple platforms, databases and applications

- IBM CommonStore for Lotus Domino provides e-mail archiving and retrieval, and manages growth for any Notes database or server platform

Business Benefits

- 30,000 daily e-mails and attachments are archived and indexed for rapid search and retrieval capabilities

- 23 million e-mails retroactively archived in case relevant format and eDiscovery ready

- Deep compression and single instance storage functionality reduced storage space by 60%

- Full search & retrieve eDiscovery capability makes it easier for users to comply with legal demands

- Users benefit from unlimited mailbox mgmt

"IBM's e-mail management offerings provided us with the stability and functionality that we needed to address and meet our e-mail archiving, retention and compliance regulatory requirements."

Rashid Mahmood, Lotus Notes Systems Manager, Thomas Miller Group

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Toyota Financial Services

TOYOTA
FINANCIAL SERVICES

Challenge

- A short term requirement of archiving all email correspondence and storing in a single and secure repository that was seamless and easy to use and search within.

- A strategic solution that could be used as a repository for HR documentation and correspondence supporting the HR department from a litigation perspective.

- In addition, they needed a better mailbox management system and needed to reduce their storage costs which were escalating.

Solution

- IBM's Email Archiving solution to archive their 1.3 million emails and attachments which are indexed for rapid search and retrieval

Business Benefits

- A strategic solution that could help them improve their ability to address their compliance requirements for SOX & the FSA

- The same technology can be used to archive data from their SAP application for compliance as well as improve the performance of the application

- Due to the IBM compression technology built into IBM Content Manager, Toyota has already seen a storage savings

"IBM Business Partner Neocol has demonstrated excellent responsiveness in providing ongoing support of the archiving system. We feel sure that our future requirements will also be met to fill our internal skills gap."

Toyota Financial Services (UK) PLC

INFORMATION-LED TRANSFORMATION

LEAD THE WAY

Halliburton

HALLIBURTON
Unleash the energy.™

Challenge

- Processing over two million invoices annually
  impacting database performance

- Major delays in receiving paper invoices

- Online access to invoice image for approval

- Audit

Solution

- IBM FileNet Image Repository

- IBM FileNet Application Connector for SAP R/3

Business Benefits

- SAP running at peak performance

- Saved millions by eliminating off-site storage fees

- Saved hundreds of thousands of dollars annually in late payment fees

- Improved efficiency

""When you consider the annual cost of off-site storage for backup documents over seven years, which is how long we're required by law to keep backups of our accounting documents, we've saved millions of dollars by archiving them electronically in the FileNet system."

Mark Hickok, System Administrator, Halliburton

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LEAD THE **WAY**

Finlay Enterprises, Inc.

Finlay Enterprises, Inc.

Challenge

- Improving application performance and service levels to customers, merchants, sales associates and internal business users

- Reducing costs for increased processing and storage capacity required to accommodate significant database growth

- Eliminating application downtime and outages during daily operations and especially during peak buying seasons

Solution

- Optim™ Data Growth Solution

Business Benefits

- Improved response time for targeted processes by as much as 60 percent or more

- Reclaimed over 100 GB of high-priced storage capacity during initial archiving, resulting in savings estimated at $1.8 million dollars in projected 5-year IT capacity expansion costs

- Increased system availability resulting from shorter batch processing windows and reduced downtime

- Achieved predictable scheduling to increase "open-for-business" hours for expanded revenue generating opportunities and customer service

INFORMATION-LED TRANSFORMATION

LEAD THE WAY

Safeco Insurance

Safeco Insurance

Challenge

- Meeting financial reporting deadlines by shortening batch cycles affected by increasing data volumes

- Reducing IT charge backs to business units by lowering CPU consumption

- Increasing application availability by reducing time for backup and disaster recovery

- Increase application performance

- Rarely accessed data, were growing at a rate of three million rows per month and consuming limited storage capacity on the production database

## Solution

- Optim™ Data Growth Solution

Business Benefits

- Database archiving has allowed us to reduce CPU usage by roughly 20 to 25 percent per month," said McGill. "And the annualized savings from implementing database archiving for the GL tables is over $90,000. This CPU savings directly benefits the bottom line by reducing charge backs to the business units

- Timely completion of mission-critical business activities

- Reduced monthly CPU usage by 20 to 25 percent and lowered IT costs to business units

- Improved application availability by shortening windows for application backup and disaster recovery

Compliant Information Management Enables Information Governance Throughout the Information Lifespan
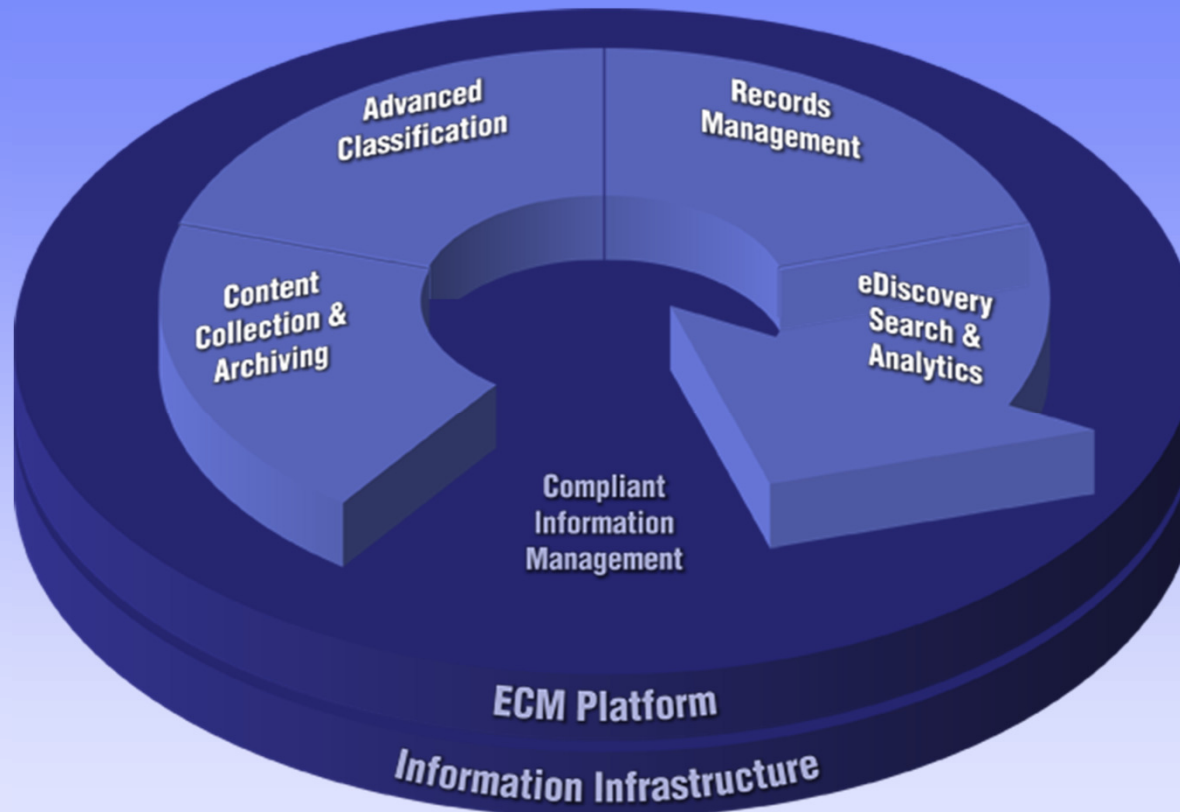
LEAD THE WAY

IBM InfoSphere 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

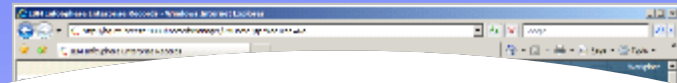- Integrated Records Federation Services f... repositories

- Complex event and records process ma... including intelligent retention, dynamic leg... 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

New!

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

Extend for integrated file room and offsite physical records storage management with Iron Mountain Accutrac Software

IRON MOUNTAIN

TRANSFORMATION THE WAY

IBM InfoSphere 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

New!

Advanced Early Case Assessment

Enhanced ESI Type and XML Support

Advanced Analytics Based Visualizations

Customer and Partner API Enablement

IBM Information Archive and SaaS Support
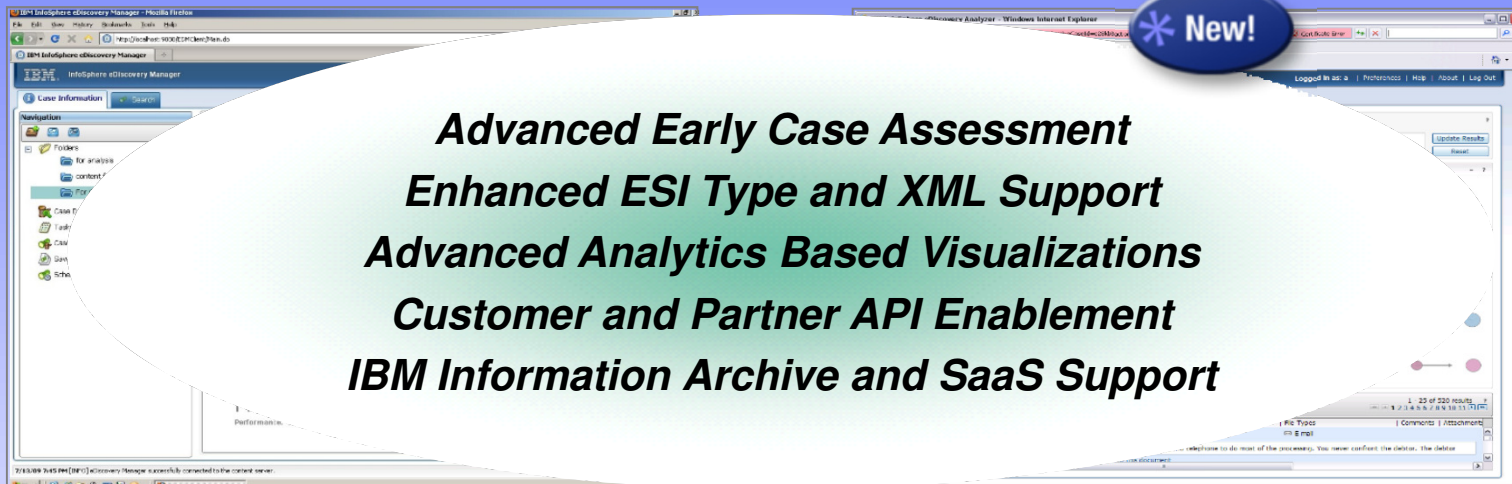
IBM InfoSphere eDiscovery Manager

- 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 InfoSphere 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

BlueCross BlueShield of Tennessee

of Tennessee
plans for better health. plans for a better life.
An Independent Licensee of the BlueCross BlueShield Association

Challenge

- Quickly adapt to industry and government regulations

- Reduce cost and risk of responding to legal discovery requests for email and files

- Reduce, consolidate and share information to produce better customer outcomes

- Flexibility to quickly scale and expand to meet future business needs

Solution

- IBM Content Collector to ingest and de-dupe Microsoft Exchange and future File System content

- IBM eDiscovery Manager to search, cull, and export case-relevant content for eDiscovery

- IBM eDiscovery Analyzer to analyze discoverable content previous done via an external firm

- Future growth options for seamless integration of IBM Classification Module to determine which content has business value and Records Manager for proper retention/disposition of corporate records

- IBM ECM platform for consolidating, sharing and activating information

Business Benefits

- Automated workflows aligned to business needs

- Archived content is accessible from other applications resulting in better business outcomes and eliminating silo'd information

- Improved control over content prior to it being archived

- Consistent rules and policies across multiple content types

- Over 400,000 daily e-mails and attachments are archived and indexed for rapid search and retrieval

- Significantly reduce the size and cost of handling litigation of investigation data

IBM's approach is simple and straight forward. We now have a solution model that meets our immediate business needs for archiving, retention and compliance and provides a lower cost, lower risk method to expand and integrate key capabilities to meet our future plans."

Andy Jacobs, ECM and Collaboration Lead Architect, BlueCross BlueShield of Tennessee

INFORMATION-LED TRANSFORMATION LEAD THE WAY

Existing and New Solutions Being Announced

New!

New Software Capabilities

Content Assessment Analytics to Accelerate and Optimize Content Collection

InfoSphere Content Collector w/ Optim Integration

InfoSphere Content Collector for SharePoint / SAP Support

InfoSphere Discovery w/ Optim Data Growth Solution

InfoSphere Enterprise Records and eDiscovery

New Hardware Capabilities

IBM Information Archive

New Services

Information Archive (SaaS) Service

IBM Reference Architecture 2.0

INFORMATION-LED TRANSFORMATION   LEAD THE WAY

Introducing IBM Information Archive
Next Generation Information Retention Solution

✳ New!

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

INFORMATION-LED TRANSFORMATION

LEAD THE WAY

Introducing IBM Information Archive
Next Generation Information Retention Solution

*A unified and simplified cloud-ready **Smart Business System** that will adapt as business needs evolve. Immediate value delivered from day one.*

Start archiving in 1 day or less

- Easy to implement, configure and manage

Begin optimizing your storage infrastructure immediately

- Offload primary storage
- De-duplication built-in
- Optionally migrate to tape for additional cost and energy savings

Retain with confidence

- Protect and secure your information

Quickly locate and retrieve information for litigation support

- Index and search on data and meta data

Universal

- Supports standard file system interfaces
- Supports applications (IBM ECM) with policy harmony

Modular and highly scalable

- Up to 304 TBs with disk and PBs with attached external tape

INFORMATION-LED TRANSFORMATION LEAD THE WAY

Introducing IBM Information Archive
Next Generation Information Retention Solution

Advanced 3 Collection Architecture enables different usage for Private Clouds and/or multiple applications

ECM Archive Repository

Users and Applications

Custom Applications

LAN

Admin UI

One Namespace

NAS	NAS	SSAM
Disk	Disk	Disk
Collection 1	**Collection 2**	**Collection 3**

Clustered   Clustered

IBM Information Archive

Tape

Automated Tape Migration

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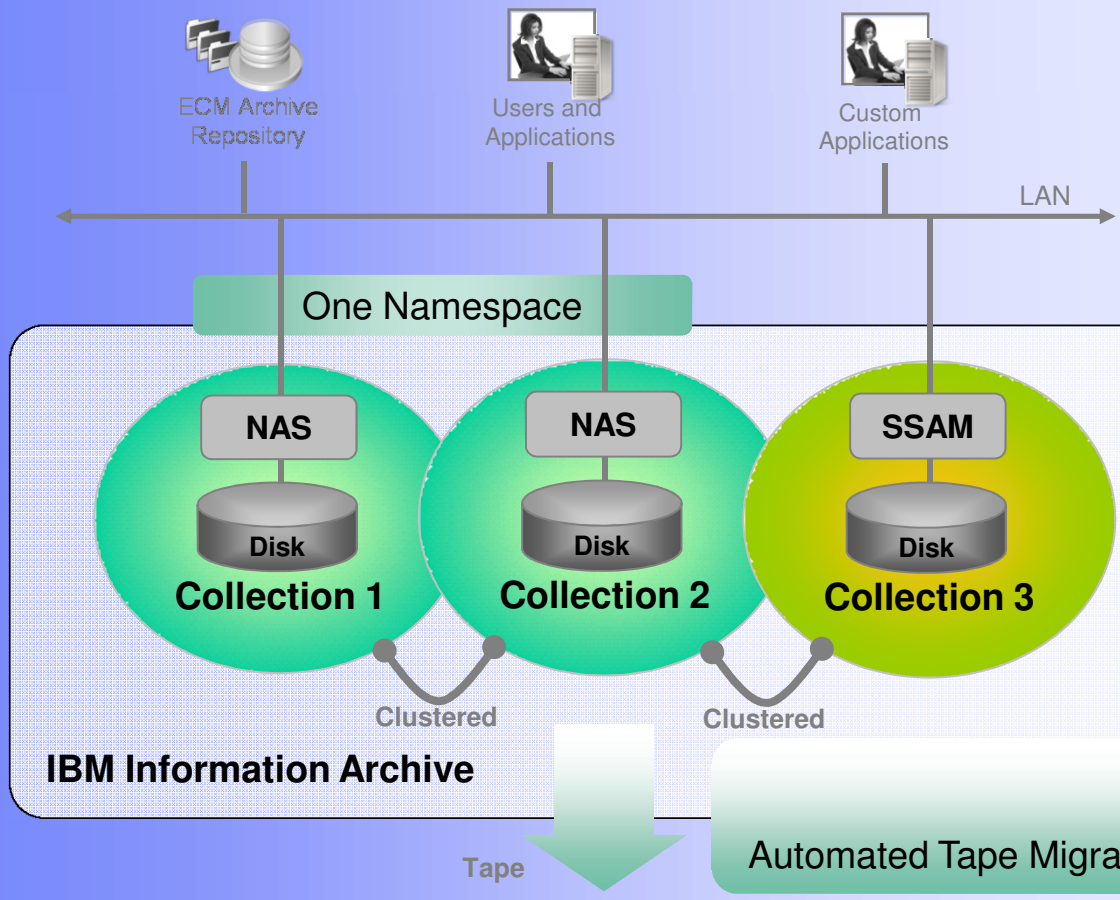
Introducing IBM Information Archive
Next Generation Information Retention Solution

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

Admin UI

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

* Release 1.5

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IBM Information Archive Key Features

Features	IBM Information Archive
Ease of Use	Appears as a file-server, simple 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, CIFS*, HTTP*, FTP*, SSAM – 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 tamper proof technology increases protection.
Index / Search	Full text indexing and search (both data and metadata)*

* Release 1.5

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Hansgrohe AG

hansgrohe

Challenge

- Lacked ability to rapidly respond to legal discovery demands

- 2,000 mailboxes, 30,000 daily email volume (3 to 5 GB/day)

- Legal requirement to archive for 10 years

- Small IT staff needed an automated solution

Solution

- Email archiving, retention, and retrieval solution bundle for mid market customers

- Total Solution components:

- Application Software: CommonStore, eMail Search for CommonStore

- Hardware: System x server; DR550 storage system

- Services: IBM Global Services

Business Benefits

- Ensures compliance with Discovery Orders, avoiding penalties and judgments from an inability to produce emails in a timely fashion

- Ability to search across mailboxes and apply multiple legal holds to critical emails ensuring retention of email for duration of need

- Single instance store to reduce volume of email and attachments in storage

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Existing and New Solutions Being Announced

New!

New Software Capabilities

Content Assessment Analytics to Accelerate and Optimize Content Collection

InfoSphere Content Collector w/ Optim Integration

InfoSphere Content Collector for SharePoint / SAP Support

InfoSphere Discovery w/ Optim Data Growth Solution

InfoSphere Enterprise Records and eDiscovery

New Hardware Capabilities

IBM Information Archive

New Services

Information Archive (SaaS) Service

IBM Reference Architecture 2.0

Coming Soon: IBM Information Archive Cloud Services

Delivering on the Smart Archive Vision … Designed to Be Fast and Easy to Deploy and Use

New!

An information archive-as-a-service based on state-of-the-art IBM Software and IBM Systems managed by IBM Global Technology Services

IBM Software

- Email archiving service with integrated content management and eDiscovery Management enabled by:
    - IBM InfoSphere Content Collector for Email
    - IBM Content Manager 8
    - IBM InfoSphere eDiscovery Manager

- Supports Lotus Notes and Microsoft Exchange

- Plans to support file, SharePoint and database archiving

IBM Systems

- Based on IBM systems and storage

- Built-on dynamic infrastructure designed for today's information growth and archiving challenges

IBM Services

- Operated by IBM Business Continuity & Resiliency Services

- Email continuity, recovery and backup services also available

Benefits

- Reduce upfront capital expense and ongoing operational costs.
- Store critical data such as email in a security-rich offsite facility based on your specific retention policies
- Lower storage costs and improve operational efficiency
- Improve response time to legal and regulatory compliance inquiries

IBM Reference Architecture for Archive v2.0
Enabler of Enterprise Archive Strategy

IBM's Reference Architecture for Archive reduces the complexity, cost, and risk of enterprise archive solution deployment and sets the foundation for delivering on the promise of Information Agenda and Information Infrastructure

Defines architecture patterns based on actual use cases

Includes Conceptual and Logical Levels of Architecture

- Conceptual: Close to business definitions, business processes and enterprise standards; it is stable over time and can be augmented as new business needs arise; it is owned by data stewards, enterprise data architects and governance groups

- Logical: Translates conceptual design into logical data design; takes in consideration existing data elements, functions, processes and their relationships; responsible to present a view of the enterprise data for user and processes consumption; owned by logical data modelers, enterprise architects and business analysts

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IBM CTO Offers End-to-End Archive Services

Tell me what to do

Help me to do it

Do it for me

1 Archiving Strategy: Assessment
- Assess IT environment / business needs
- Define target services
- Build basic business case
- Define initiatives and transition plans

2 Archiving Strategy: Detailed Study
- Define detailed service levels, organization, processes and architectures
- Define benchmark model

3 Archiving Solution Architecture
- Build concepts and architectures to implement business archive requirements including service levels and processes
- Leverage reference architecture

4 Archiving Pilot and Certification
- Implement and certify pilot program deployment

5 Archiving Architecture Deployments
- Deploy systems, services and software to meet business archive objectives and benchmarks

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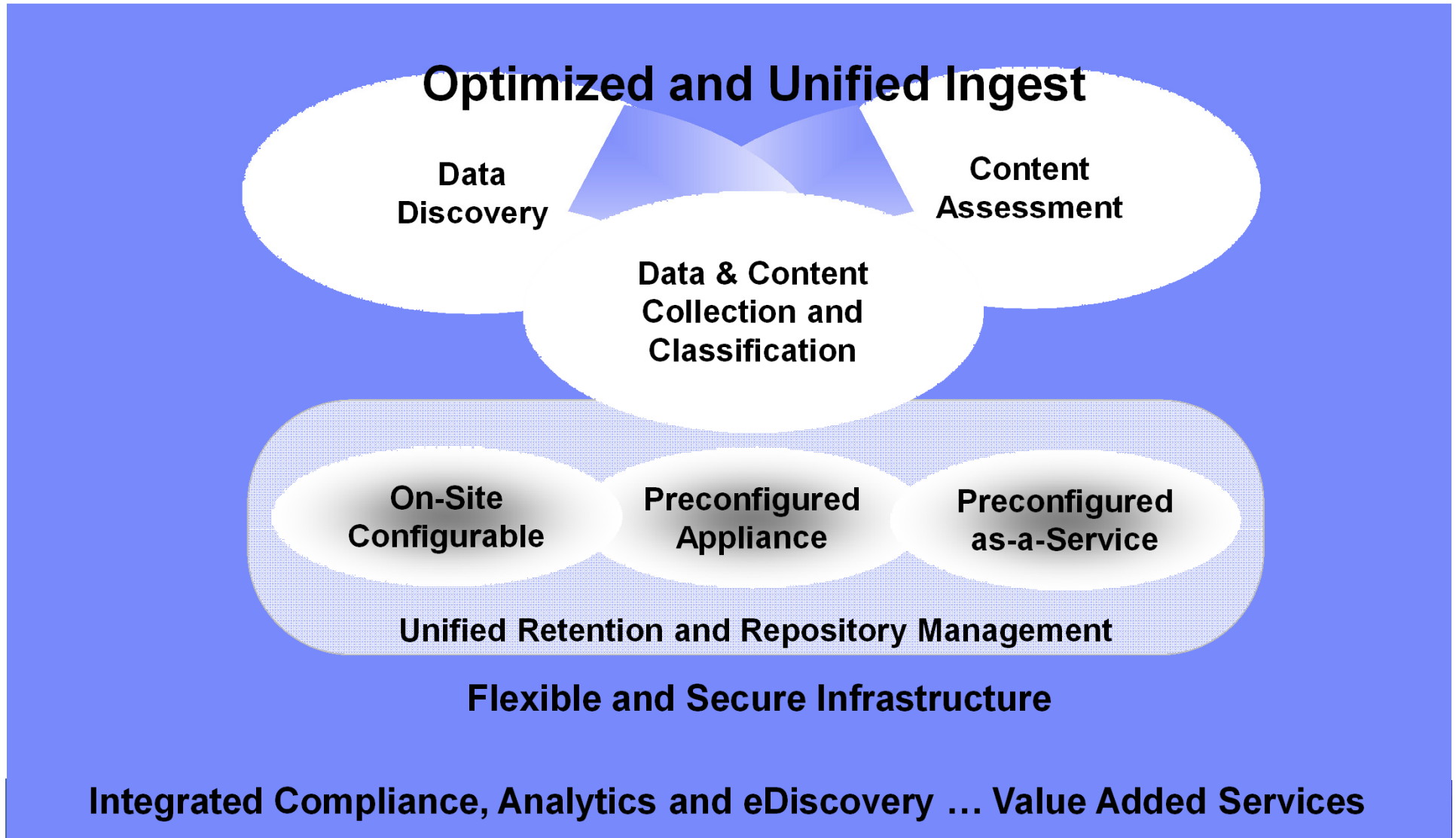
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Today's Agenda

- **The Imperative to Build a Smarter Planet**
- **The Imperative to Build a Smarter Archive Strategy**
  - **Information Explosion**
  - **Information and Infrastructure Chaos**
  - **Archiving is No Longer an Option**
- **IBM Smart Archive Approach**
- **Existing and New Solutions Being Announced**
- **Clients who support the IBM Smart Archive Approach**
- **Why IBM**

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Existing Integrated IBM Archiving S...

InfoSphere Discovery
InfoSphere Content Assessment

Reports

ERP
(SAP, PeopleSoft ...)

(Documents, Images ...)

Paper

Collaborative
...ckr, SharePoint
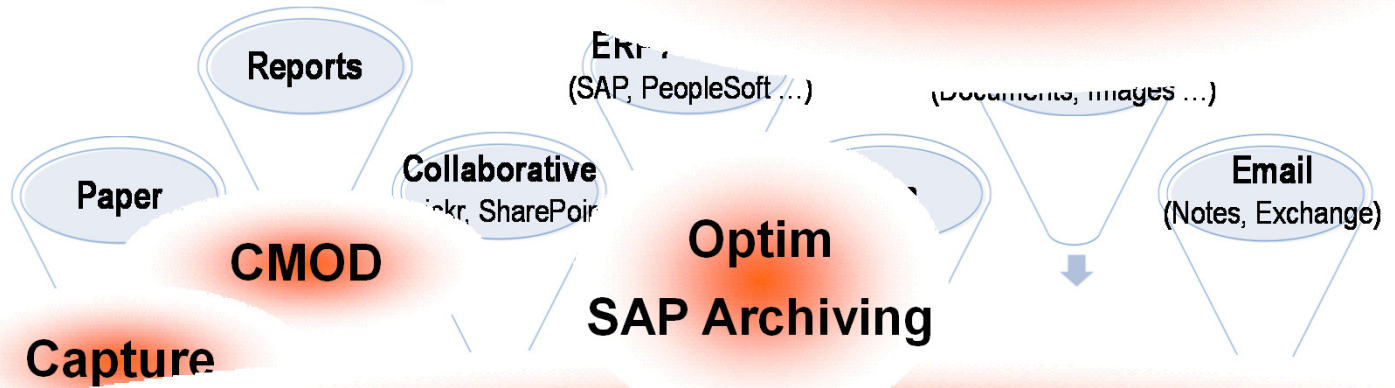
Email
(Notes, Exchange)

CMOD

Optim
SAP Archiving

Capture

Content Collector and Classification Module

Value Added
• Optimization
• System Serv...
• Managed Serv...
• Reference Architec...
• Information Governance

ECM
Repositori...

Information Archiv...

Information
Archive
Cloud Services

Cloud Ready Archi...
Stora...
Optiona...

Enterprise Records and eDiscovery Analytics

CMOD = Content Manager On Demand

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