



The Radicati Group, Inc.
www.radicati.com

Enterprise Information Archiving – Accelerating Time to Compliance

A Radicati Group Web Event

*** Please dial-in by phone to listen to the audio portion of this event. The dial-in number is in your registration confirmation email as well as on the side panel of your screen.*

9:30 am, PT
January 30, 2014

Speakers & Agenda



The Radicati Group, Inc.
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Speakers:

- ▶ Greg Clark, *Director Program Management, OpenText*

Agenda:

- ▶ *Overview Presentation from OpenText*
- ▶ *Guest Speaker Discussion – moderated by Sara Radicati*
- ▶ *Audience Q & A session*

OPENTEXT

The Power of Information



OpenText Radicati Webinar

Accelerating Time to Compliance

Greg Clark – Director, ECM Program Management – Product Marketing

January 30th, 2014

Agenda: Accelerating Time to Compliance

- Archiving spectrum of needs
- Big Content vs Big Data
- Retention strategies
- Disposition and Legal Hold
- Information Governance: Accelerating Time to Compliance
- Roundtable Discussion on Archiving
- Q&A

ENTERPRISE ARCHIVING

BIG CONTENT

**CLOUD vs
ON-PREMISE**

BYOD

DATA

SOVEREIGNTY

AUTO-CLASSIFY

**INTELLECTUAL
PROPERTY LOSS**

COMPLIANCE

EDISCOVERY

**STORAGE
COSTS**

**INFORMATION
GOVERNANCE**



Accelerating time to Compliance



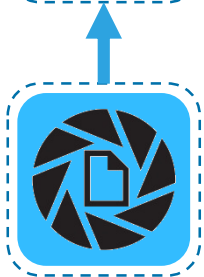
Improved Compliance and Operational Efficiency plus Reduced Litigation Risk, Storage Costs and eDiscovery Costs



Compliant Retention and *Defensible* Disposition - and Legal Hold of more and more Enterprise Information



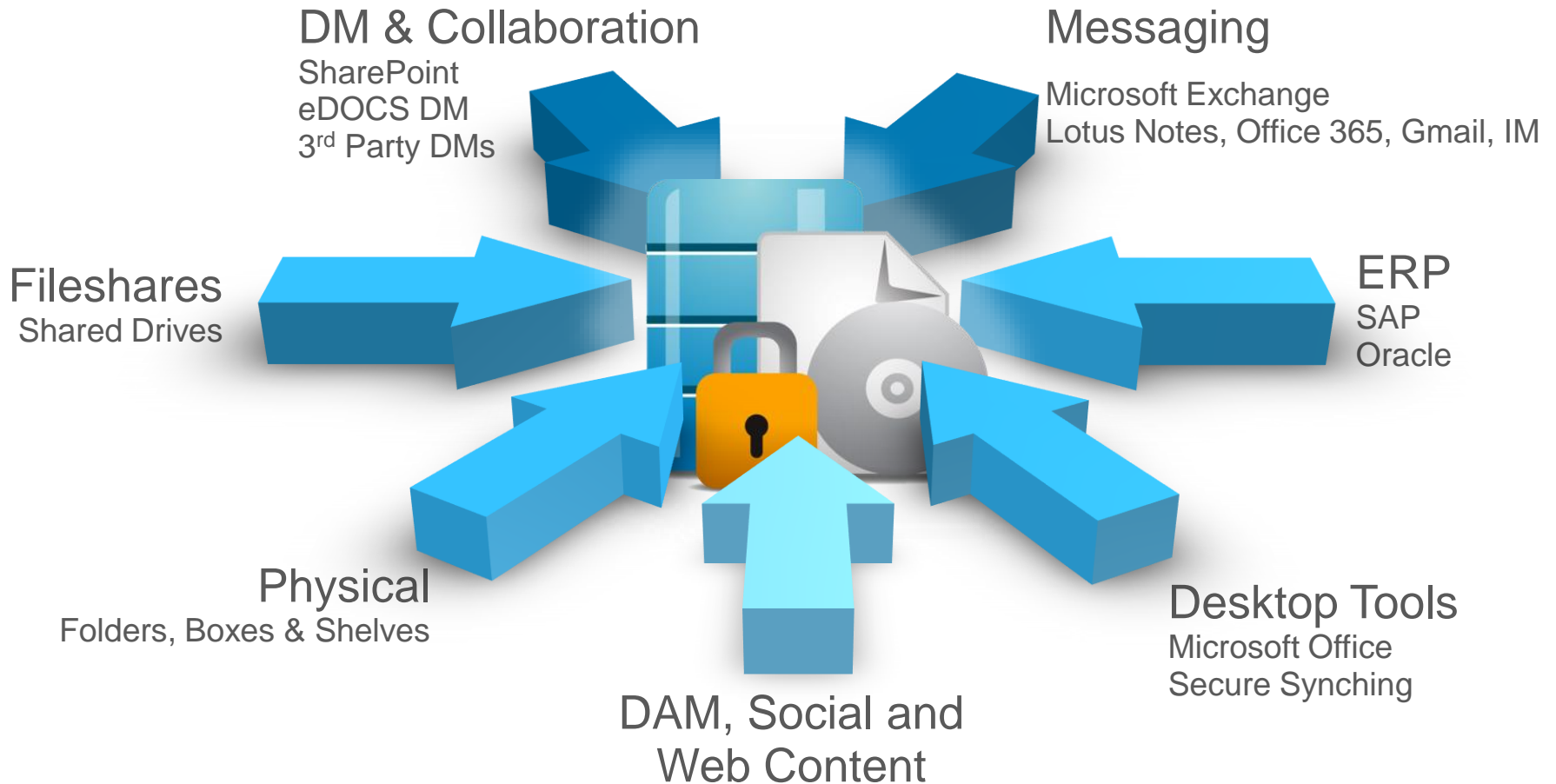
Apply Retention or Classification as per Policy



Capture all Information

Accelerating time to Compliance Capture – Big data vs. Big content

Embed information governance into the interfaces where people work



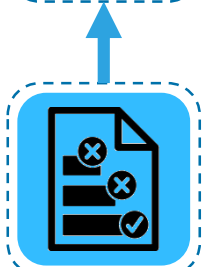
Accelerating time to Compliance



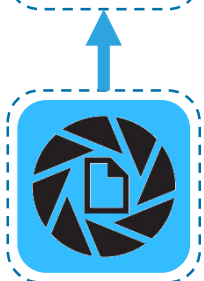
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Compliant Retention and *Defensible*
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Apply Retention or Classification as per
Policy



Capture all Information

Accelerating time to Compliance

It's really all about Capture & Classification!

1. Journaling-based Classification

2. User-Driven Classification

3. Role-Based Classification

4. Process Driven/ OCR Auto-Profiling

5. Auto-Classification

Accelerating time to Compliance



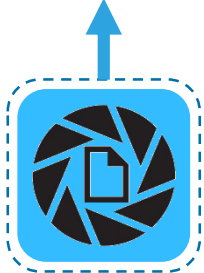
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Apply Retention or Classification as per
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Capture all Information

A close-up photograph of a computer keyboard. The focus is on the 'delete' key, which is a black key with the word 'delete' printed in white. To its left is a key with a left square bracket and an apostrophe. Below that is a key with a right square bracket and a closing curly brace. The keyboard is set against a dark, blurred background. A semi-transparent dark grey banner is at the top, and a solid teal banner is at the bottom.

**Organizations can no longer
ignore the DEL button**

the new realities

Accelerating time to Compliance

Ensure Defensible Disposition

Traceability and defensibility are paramount as information volume grows

Records Due for Destruction this month (*Disposition Reviewer: Industry Analysts Group*)

03/05/2013 12:19 PM Snapshot Status: Search Completed Review Status: Review Pending Priority: Medium

Disposition Processing

Actioned 0
Not Actioned 100%

Disposition Review Decisions

89

Apply Accession Filter Search Results Ch

Decision Finish Review

Review Decision Action Location

Review Decision	Action	Location
Pending	Destroy	Customer
Rejected	Destroy	Customer
Rejected	Destroy	Customer
Rejected	Destroy	Customer
Pending	Destroy	Customer

Comments

ekearney (03/25/2013 02:18:07 PM): I agree with Franco - please keep these objects

FrancoD (03/25/2013 02:08:56 PM): These Case Studies are still valuable and downloaded - need to keep them longer

Close

Accelerating time to Compliance

Consistent, complete preservations

Meets sophisticated requirements to create, manage, audit and remove holds.

Maintain Search Enabled Hold CASE KRAMER V KRAMER

Hold Criteria | History

Query	Scheduled	Status	Last Run Completed
Query for Hold CASE KRAMER V KRAMER	<input type="radio"/> Yes <input checked="" type="radio"/> No	Processing	
Description: Documents with Category = Scanned Image and keyword Tracy			
Query for Hold CASE KRAMER V KRAMER 2	<input checked="" type="radio"/> Yes <input type="radio"/> No	Completed	03/05/2012 04:16 PM
Description: Query looking for anything with Kramer in it			

Comment
Provide a brief description for changes. Clicking Save Changes will store the comment in History.

Create Query | Save Changes

[Back to Hold Maintenance](#)

OPEN TEXT | Content Server

Enterprise | Personal | Tools | Admin

Navigate To...

Hold Maintenance

Type	Active	Hold Name	Date	Created By	Hold Type	Date to Sus
	<input checked="" type="checkbox"/>	AUDIT	12/06/2011	Admin	SHORT	None
	<input checked="" type="checkbox"/>	AUDIT 456	01/26/2012	tcaughel	SHORT	None
	<input checked="" type="checkbox"/>	CASE KRAMER V KRAMER			SHORT	None
	<input checked="" type="checkbox"/>	GENERAL ACCIDENT FILE			AIMS	None
		Hold Group A				None
		Hold Searches				None
	<input checked="" type="checkbox"/>	LEGAL				None

- Suspend
- Delete
- Maintain Users for Hold
- Search Enabled Hold
- Export Hold Contents
- View Content Server Objects

Hold Criteria | History

- User Based
- Search Enabled
- Keywords
- Collections

Accelerating time to Compliance



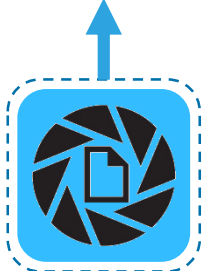
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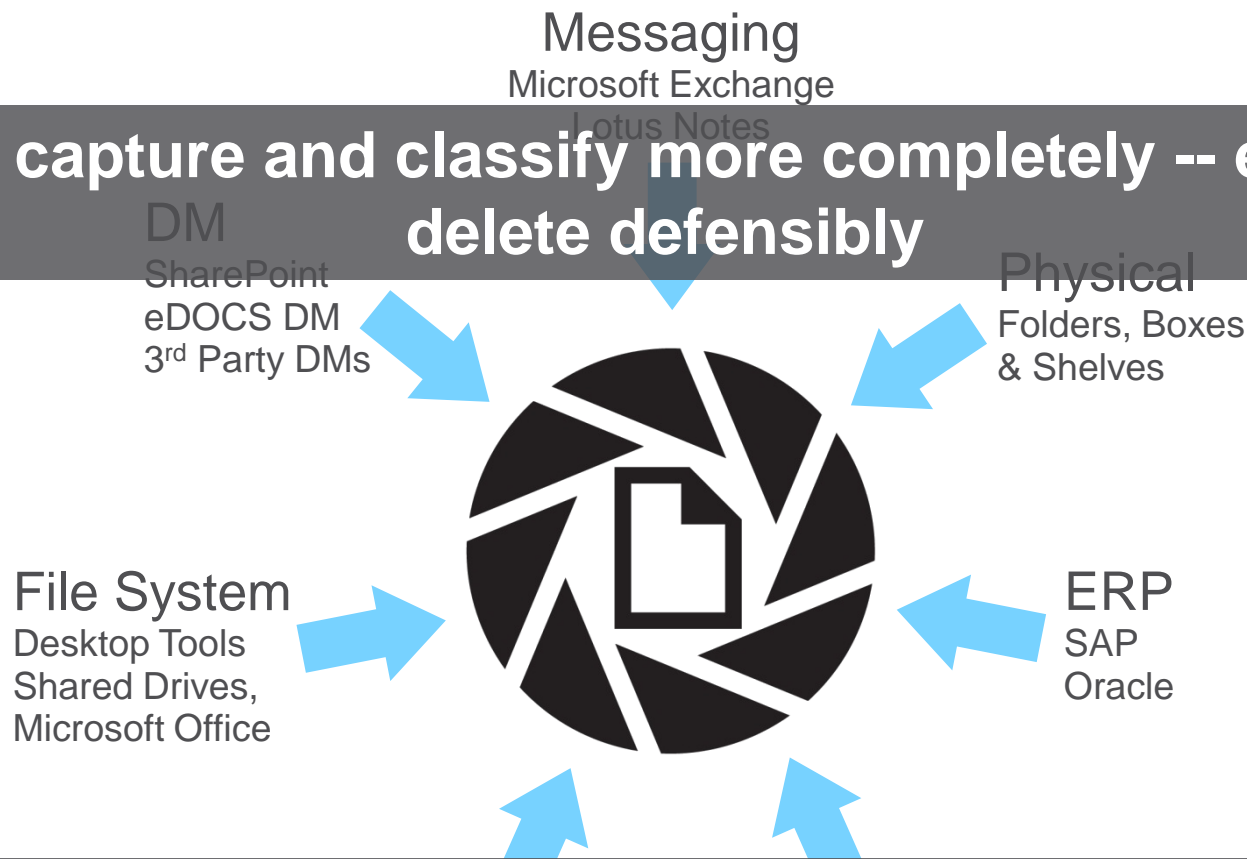
Apply Retention or Classification as per Policy



Capture all Information

Accelerating time to Compliance Capture

As you capture and classify more completely -- eventually delete defensibly



Complete capture + classify = confident compliance, simpler litigations holds, and cost savings

A hand holding a red marker is shown crossing out the word "DISORDER" in large white capital letters. The background is a blurred image of a person's face.

~~DISORDER~~

the new realities

Archiving Scenarios – Spectrum of needs

Lifecycle Driven

- End-to-End lifecycle for “active” content
- Reduce contention on mail servers & lead apps
- End user collaboration is key
- Records management compliance
- Enhanced access and security controls
- Defensible disposition
- Multi-layered classification
- Legal Hold and eDiscovery capabilities

Stand-Alone

- Rapid deployment
- Legal, regulatory and organizational compliance
- Retention & storage management
- Rapid end user access
- Broad preservation and export
- Expandable and adaptable

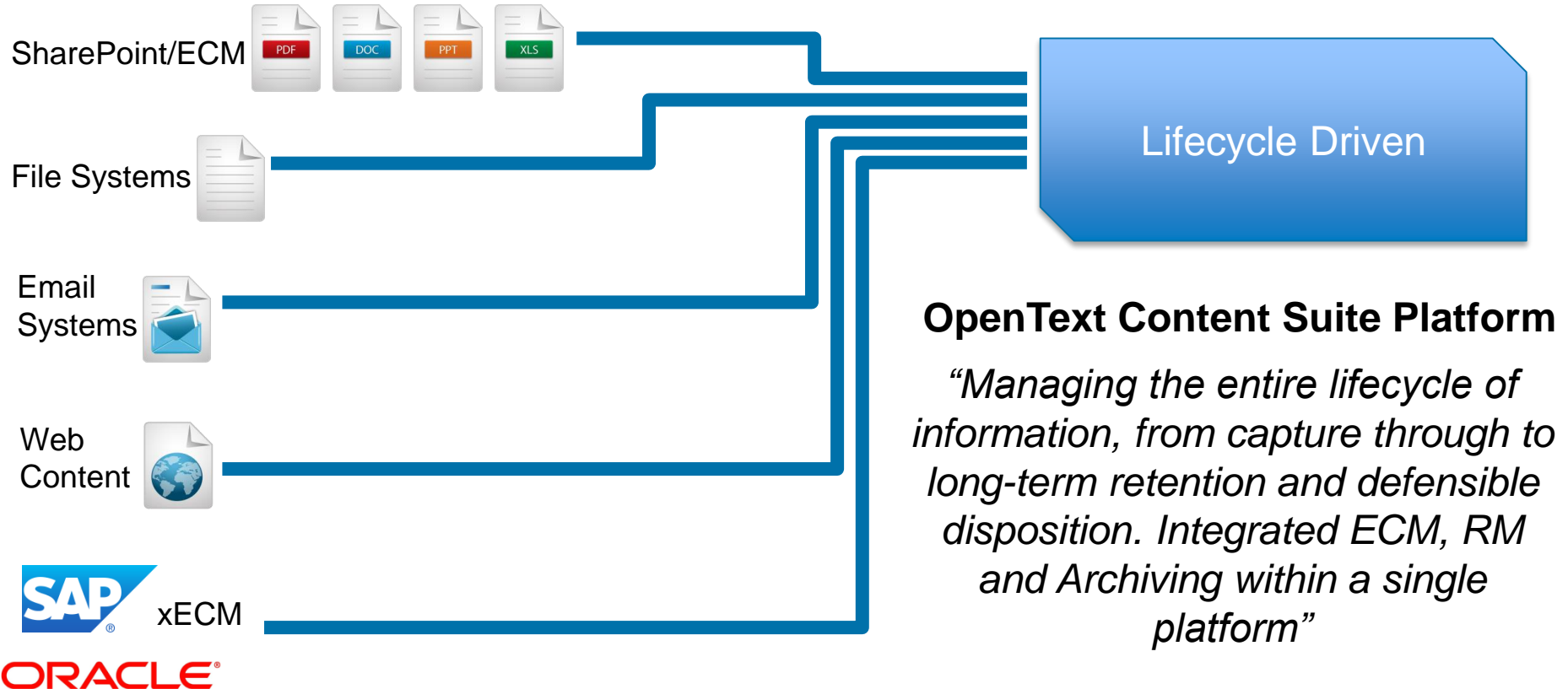
Machine-to-Machine

- Capture process driven data
- Archive and apply simple retention management on transactional data
- Offload expensive lead applications
- Expand for future growth

OpenText Archive

- **OpenText Archive covers a broad spectrum of archiving use cases** – from optimizing mission critical lead applications to capturing machine-to-machine communications, content lifecycle management to fundamental compliance-driven archiving.
- OpenText Archive provides a **compliance framework** that allows organizations to **control costs and defensibly manage** the massive amounts of information being created and consumed in Enterprises today.
- Storing everything is neither viable from a compliance perspective nor cost effective. OpenText provides **multi-channel archiving** delivering high performance processing with de-duplication, compression, tiered storage and virtualization support **enabling cheaper management, lower infrastructure costs and reduced risks.**
- **Integrates across major EIM components and other systems including:** Content Suite, Web and Digital assets, InfoFusion, terrestrial and cloud Email and Office systems, SAP, SharePoint and SharePoint Online and more...

Value Proposition – Lifecycle Driven Archiving Scenarios

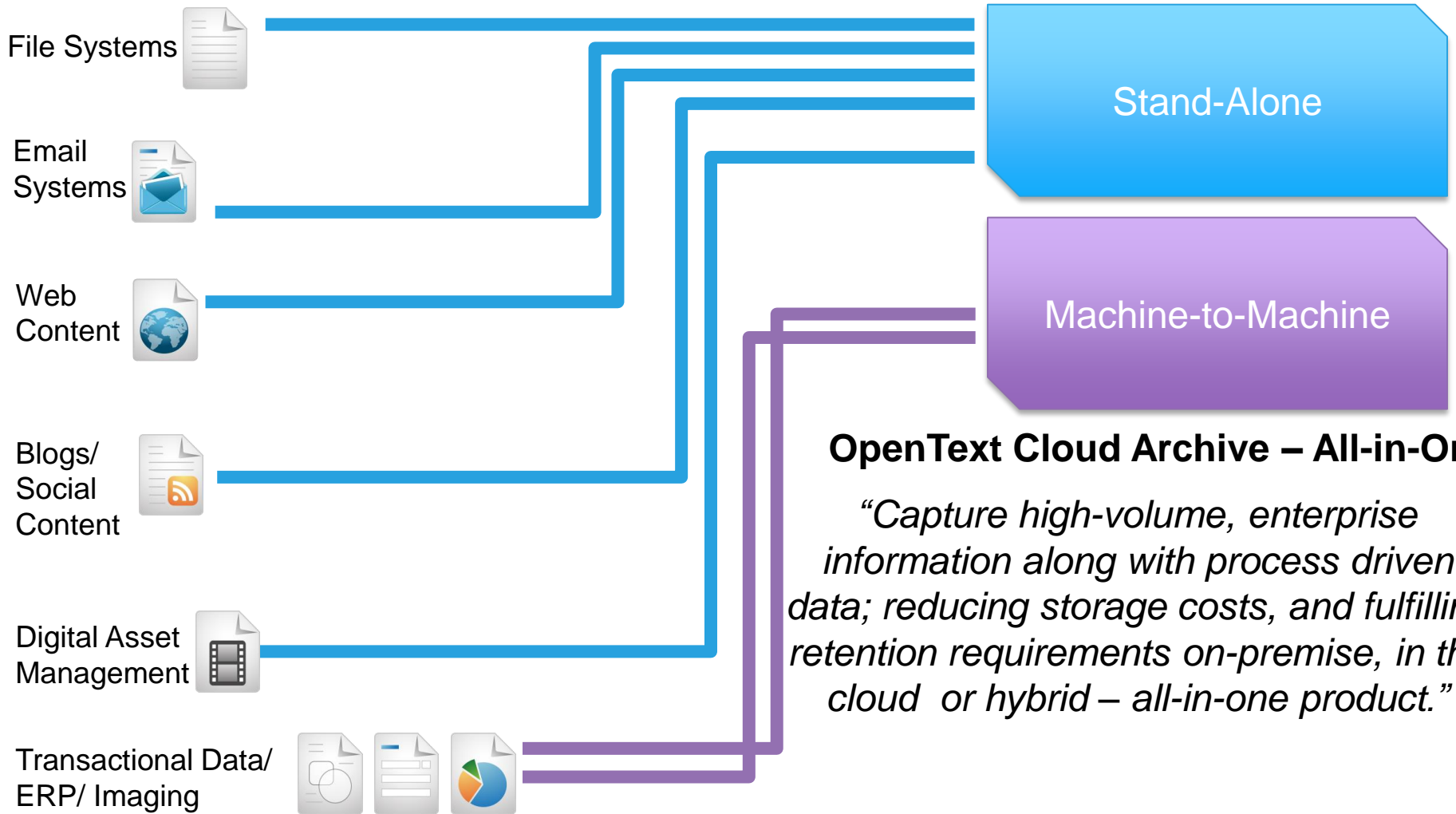


OpenText Archive: Lifecycle Management

- Deep integration with lead applications
 - SAP, SharePoint, Oracle, Exchange
- ECM, RM and archive on a single platform
- Robust classification and retention management
- Native military grade records management (DoD 5015, NARA support)
 - Defensible disposition
 - Rich legal hold management capabilities
- Auto-classification support



Value Proposition – Stand Alone and Machine-to-Machine Archiving Scenarios



OpenText Cloud Archive – All-in-One

“Capture high-volume, enterprise information along with process driven data; reducing storage costs, and fulfilling retention requirements on-premise, in the cloud or hybrid – all-in-one product.”

OpenText Archive: All-in-One

- Multi-tenant, cloud-ready repository
- Single archive code base and infrastructure
- Rapid deployment, single instance, reduced hardware footprint
- Email, file archiving with support CMIS content
- Stub-free/ Transparent end user access
- Mobile/ Offline support
- Retention and storage management with broad level legal hold and EDRM xml export





OpenText Archive Integration



- Archive Server
- Archive: All-in-One
- Content Suite
- Content Suite Platform
- Exchange/ O365
- GoogleApps
- Lotus Domino
- Archive for File Systems
- Tempo Box
- OpenText eDOCs
- Contract Mgmt
- Regulated Documents
- TCP
- EIA



- WEM/WSM
- CCM
- Tempo Social
- Media Management



- Auto-categorization
- InfoFusion
- Early Case Assessment



- MBPM
- Case360



- Rendition Server



- SAP Archiving
- xECM for SAP
- DAM for SAP
- Employee File Mgmt
- Vendor Invoice Mgmt
- Travel Receipts Mgmt



- Application Governance & Archiving for SharePoint
- SharePoint Storage Services



- xECM for Oracle eBusiness Suite



Thank You!

Q&A

Your Speaker Panel



The Radicati Group, Inc.
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- ▶ **Sara Radicati**
President & CEO, The Radicati Group
- ▶ **Greg Clark**
Director Program Management, OpenText

Thank You!



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