



Harvest.
Classify.
Manage.
Monitor.

Take Control of Network Files:

Reduce risk in your document and records project

If you are in the process of planning, rolling out, or maintaining a document or records management system, looking at file deduplication, or simply interested in reducing wasted storage space, then you will need to sort out network files. Documents, spreadsheets, presentations, web pages, multimedia files and emails – these files may represent up to 85% of data on the network of an organization.

This unstructured data needs to be tidied up, deduplicated where necessary, and valuable files migrated to a system such as an EDRMS (Electronic Document and Records Management System).

Where's the risk?

These EDRMS (or DMS or CMS or whatever) roll-out projects are typically complex, risky and have a high failure rate. Sometimes they seem to drag on forever, and are never fully implemented. The roll-out may only ever extend to a small motivated group of users – typically the original 'Trial Group'.

OK, so what's the problem?

Problems with EDRMS roll-outs are typically related to change management issues. Users have their way of doing things, of managing their documents and other files, and they don't like change. During the time of transition to the new system, they are likely to be in a limbo where some of their documents are in the new system, and the rest are still held on a file server or locally. This makes it a lot harder to manage files, and they blame the new EDRMS.

Part of the problem is that Windows, and to an extent other network file systems, doesn't provide a simple and intuitive way to systematically find, sort and manage documents and other files globally across the network. The result is that information managers in charge of a document and records project, such as the roll-out of a new EDRMS, find data migration difficult.

It's not simply the ability to move files around

Data must be sorted before it can be moved to the EDRMS. Many files will require review by a human, usually the user/owner, as part of the triage process towards deletion, archiving, or migration to the EDRMS. We need a systematic way of approaching this triage process.

The solution

People find working with lists intuitive. Working with a list, and ticking things off as they are completed, is an intuitive way of tackling a large project, such as tidying up a network file system.

Allianza Discovery is a file management—harvesting- tool that leverages this basic observation. **Allianza Discovery** delivers a global view of the network file system. It provides a systematic approach to triaging files, on servers, mail servers, personal workstations and storage appliances.

Allianza Discovery is not an EDRMS, but a file management tool designed to complement your preferred EDRMS solution.

How it works

Allianza Discovery can be installed in a few minutes. It scans the specified file servers, shares, workstations, and Microsoft Exchange mail servers of interest and creates a list of all files found including email attachments.

Take Control of Network Files (cont.):

4 ways Allianza Discovery helps with document and records projects:

1 - Data classification

Discovery reports include data aging profiles, types of data, total data per user, frequency of duplicates and other categories. With *Allianza Discovery* you can develop file management strategies, determine risk exposure, or develop an EDRMS business case or project plan.

Example: A project manager with a large government department in the transport sector was tasked with the roll-out of an EDRMS. As part of the internal business case for funding, she required data for each corporate division on the number of Microsoft Office document and spreadsheet files on the network, their age profiles, and the level of duplication.

After running a scan with Allianza Discovery, she was able to get the reports she needed in a couple of hours.

(Incidentally, while gathering data for these reports, she found some duplication in a number of CAD files that could have serious implications for the department. Some engineers were working with outdated drawings. The benefits in risk mitigation from this discovery alone were substantial.)

2 - Data cleanup

Use File Queries to create lists of files for bulk management. Management processes may include archiving of low value data, deletion of rubbish files, or moving files to an EDRMS.

Example: A consultant assisting a medium size service business with an information management project, was faced with a need to tidy up a considerable number of files on the main file server. They mainly consisted of various types of documents owned by staff in the four internal divisions.

The Allianza Discovery file management tool allowed him to dump a complete list of files for each division into a spreadsheet. These were printed out, and formed the basis for a 15 minute group meeting with members of each division. The files were then categorized as Delete, Archive, EDRMS, or For Further Investigation. The consultant was then able to use this information to reduce the amount of clutter on the file system by 50%.

This process was repeated on a monthly basis for several months, and resulted in the virtual eradication of network file clutter.

3 - Enforcing policies

The use of file queries and scheduled tasks enables the automated identification and management of non-compliant files. E.g. certain classes of files may be automatically archived.

Example: The information manager for a large vehicle supply and service company was faced with a rapid proliferation of downloaded video and sound files that were taking up valuable space on the main file server. In this organization, there was no need for users (outside the marketing department) to maintain this type of material on their file shares, except for certain training videos.

The manager set up a scheduled task to move all video files, except those owned by marketing, and known training videos, to a 'disposals' folder once a week. This was done at a time when it was unlikely to impact network traffic or server availability. A second scheduled task swept the 'disposals' folder every week eliminating any files over three months old.

4 - Ongoing monitoring

Monitor policy compliance, analyze historic trends, and measure the effectiveness of your EDRMS project with relation to a variety of performance indicators.

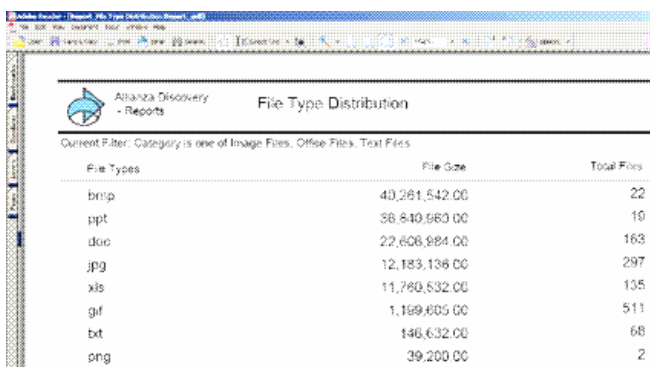
Example: For one Document and Records manager, key performance indicators for her EDRMS project included levels of Microsoft Office file duplication, aging profiles, and the number of files in each category external to the folder where the EDRMS stored it's files.

Weekly scans of the file system and use of the Allianza Discovery historic reports capability, enabled her to deliver highly relevant reports to senior management without spending much of her busy schedule on their compilation.

Flexible reporting

In addition to standard reports, such as file duplicates, agent drive summary, file type distribution, un-accessed files, wasted space and others, information managers can initiate **Discovery** File Queries. Historic trends reports provide useful indicators of the success of project or policy implementations.

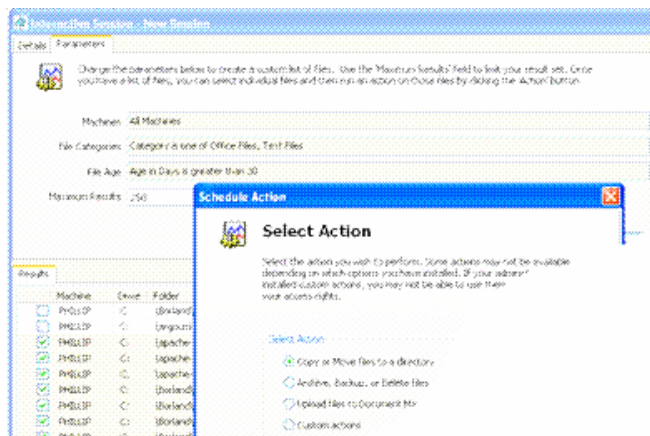
The results of interactive sessions may be exported in common formats such as csv, and are ideal for detailed analysis by information managers, or distribution to user groups.



File Types	File Size	Total Files
brp	40,261,542.00	22
ppt	58,840,560.00	19
doc	27,606,984.00	163
jpg	12,183,136.00	297
xls	11,760,532.00	135
gif	1,169,605.00	511
txt	146,632.00	68
png	39,200.00	2

File management automation

Allianza Discovery empowers information managers with file operations exactly tailored to business needs, adding value to existing EDRMS systems and simplifying deployment strategies. **Discovery** File Queries can be refined and then saved for scheduled actions such as Copy, Move and Delete. These scheduled actions may include such things as moving files to an EDRMS pick-up folder, a network storage device, or a temporary folder for review.



Support for Microsoft Exchange

One of the big challenges in managing unstructured data, is dealing with email attachments. This can be a major source of file duplication, and overall proliferation of data as files are emailed back and forth within the enterprise.

Discovery delivers the capability to include Microsoft Exchange Servers in the network scan for files. An Exchange Server is treated just like another network drive.

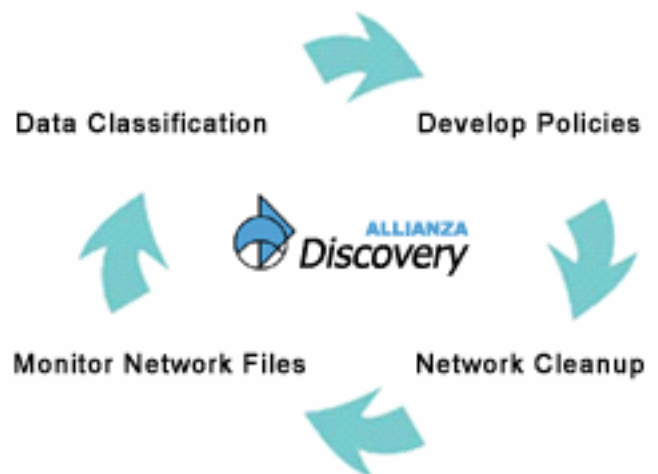
Email attachments can be included in the file census and data classification exercises as though they simply sitting on a file server. If required, management processes such as Copy, Move and Delete can be applied to email attachments. Short-cuts to archived files can also be left in the system so that users can recover email attachments if needed.

Support and Customization

At Allianza, we understand that a positive user experience of our products is critical to our success. We are therefore dedicated to ensuring that you, as a customer or potential customer, are well supported by phone and/or email during testing and evaluation, deployment and advanced usage.

We are as keen to hear about your problems with the product as we are to hear about your wins, and any suggested enhancements that might make your life easier.

We also provide specific customization and integration services to meet your particular needs. These might include specific reports, or integration with other systems or databases.



Allianza Discovery provides a logical and intuitive framework for managing unstructured data.



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FEATURES	BENEFITS
Summary Reports	
<p>Drive usage, Duplicates, File Age, File Categories, File Type, User Usage Charts, Wasted space.</p> <p>Data classification.</p> <p>Historical Drive Usage and Duplicate trends</p>	<p>Develop file management strategies, determine risk exposure, or develop an EDRMS business case or project plan.</p> <p>Determine costs of wasted space by assigning real costs of network drives.</p> <p>Reports are heavily parameterized, highly configurable, and may be viewed in real-time or emailed to the administrator.</p> <p>Optional inclusion of email attachments within Microsoft Exchange server.</p> <p>Historical reports provides performance indicators for monitoring effectiveness of projects or policy initiatives.</p>
File Queries	
<p>Develop File Queries using a wide range of parameters related Location, Owner, and File Categories.</p> <p>Save File Queries, Load File Queries, and use them as the basis for individual or bulk file management tasks or Scheduled Tasks.</p> <p>Export file lists in a variety of formats.</p>	<p>Analyze and manage unstructured data. Heavily parameterized queries deliver the ability to 'drill down' into network file systems without the distractions of file system navigation.</p> <p>Develop file management tasks that reflect business policy.</p> <p>Analyze or distribute file lists in convenient formats such as Microsoft Excel.</p>
File management automation	
<p>Save interactive sessions for further scheduled actions.</p>	<p>Delivers automated file management operations reflecting business policy.</p> <p>Option to leave Windows shortcuts if desired.</p> <p>Monitor the network for files that are non-compliant with information management policies.</p>
Allianza Discovery Administration	
<p>Logging of file management operations.</p> <p>Multiple user accounts.</p>	<p>Provides an audit trail and confirmation of the status of individual file management operations.</p> <p>Assign multiple users with appropriate file management permissions.</p> <p>Allow for a range of optional email event notifications relating to file system scanning and task execution.</p>



System requirements:

- **Allianza Discovery**—Windows XP, 2000, 2003, Processor min 2.0 GHz, 1 GB RAM, 250 MB install space, data storage 1 MB per 1000 files indexed.
- **Allianza Discovery Control Center**—Windows XP, 2000, 2003
- **Allianza Discovery Agent**—Windows XP, 2000, 2003



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Do you have an issue with unstructured data on your network?

Are you project managing an EDRMS roll-out?

Do you have an existing EDRMS but are still coping with legacy data outside the system?

Are you looking for a cost effective and direct way to free up network storage?

Do you want to manage user file system quotas more effectively?

Do you want to automate routine file management operations using specific, policy based tasks?

Next steps...

- The best way to trial *Allianza Discovery* is with a scan of the data within your own enterprise. We will send you a trial CD of a fully functional *Allianza Discovery Enterprise Edition* or if you prefer, make it available for download online. A license key with a 14 day expiry will be emailed to you separately.
- If you wish, we will consult with you by phone or email during the install. We will also provide you with a range of simple, clear-cut, financing options covering Business and Enterprise editions, so that you can make a fully informed value appraisal for your enterprise.
- If you wish to continue to use *Discovery*, we can simply update your existing installation with a new license key. No need to reinstall—just proceed with your file management operations.

To take the next step just go to:

www.allianza.com.au/downloads

About ALLIANZA SERVICES: Allianza Services Pty Ltd delivers solutions and services for the management of unstructured data.

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