

PRODUCT FLASH

Unified Access Case Study: X1 Creates Order from Chaos

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IN THIS PRODUCT FLASH

A well-designed search application shrinks hour-long searches to seconds. This IDC Flash looks at how a global energy firm used the X1 Enterprise Platform from X1 Technologies to shrink searches from hours to seconds and thus to unify access to disparate content stores within a Microsoft-centric environment. For knowledge workers within the firm, finding things became much easier. For the IT group, taking stock of the millions of shared files and weeding out the stale content was finally a possibility. Using enterprise search for unified access leaves the existing file sharing infrastructure in place — augmenting what's already installed rather than replacing one environment with another.

The company intranet, based on a foundation of Microsoft Exchange servers and network file shares, enabled the energy company's project teams to exchange messages and store files on shared network drives. Secured through an enterprise directory server, teams could readily share project-related documents and data around the globe. But the easy access had unforeseen consequences: As teams stored more folders and files to the network file shares, the environment quickly became unmanageable. Invariably, the IT group is left to clean up the mess. X1 Technologies controlled the content chaos by creating a platform for ad hoc information sharing across a global enterprise.

SITUATION OVERVIEW

When a genie escapes its bottle, the best you can hope for is to prevent mayhem and, with luck, control it. By 2005, the IT group in a global energy firm faced an all-too-familiar dilemma: Content was being stored willy-nilly on file servers all over the enterprise. Rather than rein in the spirit of collaboration that had allowed information chaos to explode, the IT group needed to get it under control — to enable managing and finding content no matter where it was stored.

The problem had its roots with a simple innovation begun almost a decade earlier and designed to meet a business need. As the intranet spread throughout the company in the 1990s, the company's petroleum engineers, geologists, scientists, and other highly paid technologists began to rely on email and network addressable file shares. They used Exchange servers to chronicle their conversations. They filed Office documents and data sets from a myriad of different applications in project folders on the shared O drive, a file share (or network place) on the intranet. Task teams then accessed project-related files and data from their desktop and laptop devices. Drilling engineers in the Niger Delta could easily share content with company geologists in Houston and metallurgists in Tokyo and develop cutting-edge solutions to retrieve hard-to-tap energy fields. Staff members also relied on another file share — the P drive — to back up and store all of the personal information they wanted to move from their local hard drives.

Content storage for these Microsoft file shares was cheap and convenient. The company's enterprisewide implementation of Active Directory Server ensured authorization and access controls for folders, subfolders, messages, and documents. Security on the internal network was assured thanks to the company firewall and other network access restrictions. An administrative support staff assisted the more than 3,000 knowledge workers and kept everything organized.

But as time went on, the number of files on the Exchange servers and O and P drives grew exponentially. When the engineers and scientists lost their administrative staff due to a corporate downsizing, they had to manage the file shares on their own. Many then found that they were wasting too many hours each week just locating legacy content from collections of thousands of separate files, each with unique folder and file names. Nor did the company have any consistent file retention policies for archiving or purging old stuff. Project teams lost track of the files stored on the shared "O" drive and failed to dispose of content in an appropriate manner. Staff members changed jobs and frequently did not delete their documents and data sets before moving on.

Faced with a mushrooming problem and an administrative nightmare, the IT group decided in mid-2005 that it needed to get control of the situation. Adopting an enterprise content management (ECM) solution and trying to impose some kind of order on the ad hoc information-sharing environment was not really an option. The company already had three ECM vendors' systems installed, and none provided the intuitive flexibility of email and network file shares. It needed some kind of technical solution that didn't disrupt a rich collaborative environment. Many IT staffers and knowledge workers used various Web-based applications at home to manage their personal stuff and knew that there had to be a better way to organize their work-related information.

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Unified Access to Content and Data: Product Flash

The IT group looked for an easy-to-implement and -maintain application that would securely find content across disparate file shares and message stores — an enterprise search solution. The group considered several products before selecting the X1 Enterprise Platform, an enterprise search application from X1 Technologies, as the most appropriate unified access solution for the energy exploration business.

Although the X1 Enterprise Platform offers features that fit the company's requirements, the intuitive interface makes adoption easy. This platform features an extensible set of content connectors to query and access content stored with Exchange message stores, Microsoft file shares, unstructured content repositories, and structured databases and networkwide content crawling and indexing, in a robust and efficient manner. The X1 Enterprise Platform readily adapts to the underlying enterprise security architecture and ensures that only individuals who have been granted access rights to view files can even find the links or references to them.

The X1 Enterprise Platform was installed within a matter of months and deployed around the world during 2006. Two factors are driving the adoption of X1's enterprise search solution across the global energy firm.

First, the engineers and scientists continue with their ad hoc information sharing — relying on email and shared folders — while also saving time. Knowledge workers easily search across their multiple content folders and messages. The user interface enables them to interact with both the search results and the documents in the same window. It eliminates the frustration of opening and closing windows when moving from one application to another. Rather than users spending hours trying to find the right stuff, the search engine returns relevant results in a matter of seconds. The X1 Enterprise Platform augments the current collaborative computing environment with unified access capabilities, while also adding robust content security. Knowledge workers discover only the content they have access rights to view.

Second, the IT group is finally able to inventory the Exchange message stores and network file shares. Staffers easily search across the millions of stored files, identify those no longer in use, and weed out the stale content. They check for privileged content and ensure that the firm is purging documents that it is contractually obligated to remove. Without implementing a formal content retention policy, the global energy firm retrospectively checks for compliance and manages the risks associated with networked file sharing.

FUTURE OUTLOOK

The global energy firm has decided to standardize on Microsoft Office SharePoint Server (MOSS) 2007 and Microsoft Vista as the ad hoc information-sharing platform for the future. It expects to consolidate the management of the Exchange message stores and the network file shares into this platform over the next two to three years.

But the jury is still out on Microsoft's bundled search capabilities. The X1 Enterprise Platform raises the bar on what knowledge workers within the global energy firm expect and on what the IT group needs to provide. The unified access genie is out of the bottle. Any MOSS adoption strategy will have to provide the same functionality or better.

Fortunately, X1 Technologies is also planning the tight integration of its enterprise search application with the new Microsoft platform. In all likelihood, the global energy firm will be able to leverage its current investments in an enterprise search solution and continue to add unified access capabilities to its ad hoc information-sharing environment. Once knowledge workers and the IT group know what is possible, there'll be no turning back.