

Cloud Collaboration: Strategies and Technologies

Bud Porter-Roth
Porter-Roth Associates

Porter-Roth Associates

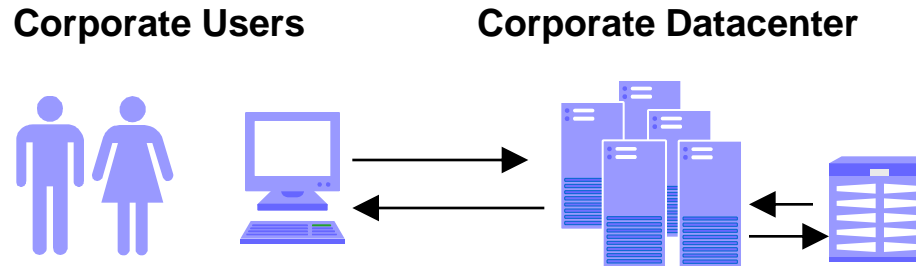
- Independent, vendor neutral, consulting in:
 - Cloud Information Management (CIM)
 - Electronic Document Management
 - Document Imaging
 - Records Management
 - Workflow
 - RFP Development
- <http://www.erms.com>
- info@erms.com
- 415-381-6217

Agenda

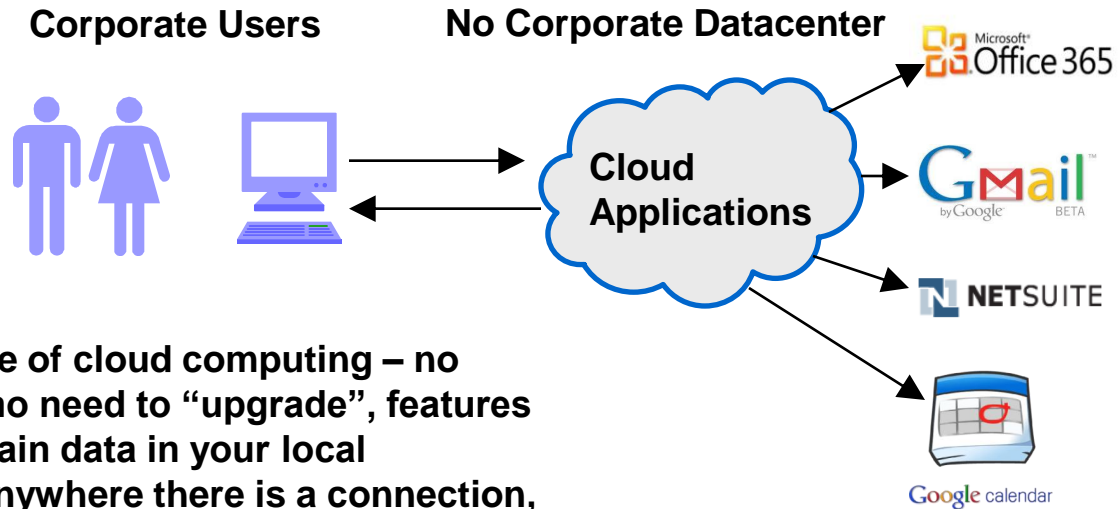
- Introduction to Cloud Computing
- Introduction to Cloud Information Management (CIM)
- Benefits
- Risks
- Who is Using CIM
- Getting Started – Your Next Steps
- The Future

Cloud Computing 101

Traditional access to data within a corporate environment



Cloud Computing Example



Gmail is a good example of cloud computing – no software to download, no need to “upgrade”, features already set, don’t maintain data in your local computer, log in from anywhere there is a connection, reliable, and cheap.

What is Cloud Information Management (CIM)?

CIM is the ability to use Document Management functions and applications in a cloud environment – create, store, retrieve, check in/out, version control, records management, security, search, audit history, etc. For this presentation, we will focus CIM systems that provide (or try to provide) the basic functionality of a standard document & records management system but do it as a cloud-based service.

Some Cloud Essentials

- **SaaS** – A hosted application accessed through a Web Browser. Provides an user interface with applications, such as blogs, email, content management, office productivity, CRM, ERP...
 - Examples include: Box, Salesforce, NetSuite, Gmail, Yammer...
- **PaaS** – An in-cloud platform for the development and deployment of cloud software applications using supplied development tools/languages, frameworks, management tools...
 - Examples include: Force.com, Azure, Google AppEngine...
- **IaaS** – Provides virtual or physical hardware resources offered as a service. Provides virtual machines, virtual storage, virtual infrastructure, and S/W & H/W assets that can be provisioned for hosting applications. Typically provides computer resources, networking, storage...
 - Examples include: Rackspace, Heroku, Amazon...

Deployment Models

- **Public Cloud** - A public cloud is one based on the standard cloud computing model in which a service provider makes resources, such as applications and storage, available to the general public over the Internet. Public cloud services may be free or offered on a pay-per-usage model.
- **Private Cloud** – a private cloud is the implementation of cloud services on resources that are dedicated to your organization, whether they exist on-premises or off-premises.
- **Hybrid Cloud** - A hybrid cloud infrastructure is a composition of two or more clouds that remain unique entities but are bound together by standardized or proprietary technology that enables data and application portability.

Cloud Collaboration Offerings

1. Store and Retrieve – very basic and functions like an FTP site. Typically no document management capabilities – but can be useful
2. Content Collaboration – offers basic storage and retrieval but also includes document management capabilities that allow multiple people to collaborate on content
3. Platform – offers a complete environment including storage and retrieval, content management, and office productivity applications such as word processing, spreadsheet, presentations, calendaring, workflow, etc.
4. Functional Applications – offers functional applications such as project management, CRM, ERP, HR in addition to simple storage and retrieval of documents
5. Social Networking – offers the ability for social communities to be formed in addition to simple storage and retrieval of documents

Simple Storage and Retrieval

Allows for simple file storage and retrieval. No real document/records management capability. Allows you to “share” documents by email invitation or shared password.

- Amazon Cloud Drive
- SkyDox
- Dropbox
- SkyDrive
- iCloud

SkyDox

Porter-Roth Associates

All files

- All files
- My folders
 - New folder
 - Test

+ Upload



10_Critical_Requirements_for cloud computing.pdf

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Content Collaboration

Allows simple DM/RM (RM is very limited) capabilities such as folders/subfolders, versioning, checkin/out, simple workflows, search, and audit trails. Multiple users can log into the site.

- Box.com
- Google Docs
- Igloo Software
- Zoho
- Huddle

Box.com

All Files > AIMM Cloud Collaboration

AIMM Cloud Collaboration

Files and Folders | 2 Discussions

Upload | New...

Sort by: Name

Add a folder description...

- Issues List**
Updated Oct 12, 2011 by You 4
- "Please document any issues that come up and I will resolve them."
- Project Documents**
Updated Oct 30, 2011 by rileybeeb@ gmail.com 13
- "This folder contains the MS Word documents for each section."
- Research Documents**
Updated Nov 4, 2011 by You 33
- "Please upload and share any documents that may be relevant to the project."
- Schedule and Assignments**
Updated Oct 27, 2011 by You 1
- "This document contains the overall outline, schedule, and writing assignments for this project."

Box.com

The screenshot displays the Box.com interface with a list of documents. The first document, "Chapter 1 -6 Introduction.docx", is selected, and its context menu is open. The menu includes options such as Preview, Download, Upload New Version, Lock File, Add Tags, Share, Create New Task, File Properties, Move or Copy, Delete, and More Actions. The "File Properties" option is expanded, showing sub-options: Rename / View File Info, Access Stats, Version History, and Set Expiration. The document list includes the following items:

Document Name	Created	By	Size	Version
Chapter 1 -6 Introduction.docx	Oct 30, 2011	You	12.0KB	5
Chapter 10 Legal.docx	Oct 13, 2011	You	12.2KB	2
Chapter 11 Compliance.docx	Oct 25, 2011	You	12.4KB	3
Chapter 12 Financials.docx	Oct 25, 2011	You	12.2KB	2
Chapter 13 Benefits.docx	Oct 25, 2011	You	12.0KB	4

Platform

Includes DM, office applications, workflow, email, calendaring, workspaces, forums (wiki, blog), and other features. RM is limited or not available depending on the product.

- SharePoint (provided as a service)
- Office 365 (includes SharePoint)
- LotusLive Symphony
- Glide
- Google Groups
- HyperOffice

Functional Applications with DM

Applications built around functions like accounting, HR, CRM, and PM. Generally no DM or RM capabilities.

- Basecamp – Project management
- Moxie Soft - CRM
- Salesforce – CRM
- Jive – Social software
- Yammer – Social Software
- Workday – HR Software

Social Networking

Social networking apps – typically have no DM or RM capabilities but can be used for file storage and sharing.

- Jive – Social software
- Yammer – Social Software
- Chatter
- Facebook
- LinkedIn
- SharePoint?

Key Benefits of Cloud Computing

- On-demand Self-Service - User can order and provision services directly – user is empowered to acquire and maintain the application
- Basic site can be setup and operating within 30 minutes of provisioning
- User/owner can set libraries, folders, security, permissions, versions, workflows, and other aspects of site operation directly – no IT required
- User can invite other users from within the company to share documents
- User can invite other users from outside of the company to share documents

Key Benefits of Cloud Collaboration

- Lower initial and startup costs
- No yearly “major version upgrade” costs
(SP 2003 → 2007 → 2010 – how much did that cost?)
- Low barrier to entry, high and quick return possible
- Measured service, pay as you go
- Quality of service (SLA) – reliable and available
- Highly scalable – resources are available when needed
- Rapid elasticity – resources are consumed on-demand
- Outsourced IT for system management
- Vendor provided maintenance
- Device independent (PC, Apple, Tablet, Smartphone)

Risks

- Security (physical and data)
- Requires fast Internet connection
- Rapidly changing vendor community and feature sets
- No customization to meet your “unique requirements”
- Compliance may be challenging for regulated industries
- No CIM “standards” – however all basic Internet standards apply
- Customization (it is a configurable application, not a customizable app)
- Company can easily lose control of information without governance
- Lack of (for most) records management
(unless you use a hybrid, for example – Box + Documentum)
- Inability to manage legal/audit/business holds on any scale
- IT has a lesser role? Good?

Standards

“It's not that there aren't any standards, it's that everyone has one and there are already some in place that cover the same ground” Forrester Research

- NIST
- IEEE
- Open Grid Forum's Open Cloud Computing Interface
- Open Cloud Consortium
- OASIS

Buyer beware – some “cloud” apps are really legacy applications clothed in an ASP or Hosted model and called a cloud application or, “cloud ready”no standards to prevent this type of misunderstanding.....

Cloud Collaboration Who is Using It?

- Public
- Private
- Non-profit
- Individuals – whether you know it or not
- Start-ups
- SMBs

If you look at the names on any of the sites, they are a who's who of top companies

Why are They Using It?

- File System Consolidation/elimination – file shares, eRoom, legacy applications
- Next Generation Collaboration – social networking and collaboration
- Secure External Collaboration – working outside of the firewall
- Enterprise mobility – adding smartphones and tablets
- Extending Enterprise Applications – front-ending legacy applications – Box to Documentum
- As a Platform – used as the primary document management system

Getting Started - Your Next Steps

- Establish a Pilot / Learning System. Form a pilot team that is document and collaboration intensive. Include the need to work with people outside of your firewall.
- Establish your basic requirements using information from your pilot system. Deconstruct your pilot experience and use that to start a requirements document to supplement existing requirements.
- Plan for security – use pilot to establish deltas
- Plan for Records Management – use pilot to establish deltas
- Plan for migration – do you plan to migrate large data sets from shared drives, eRooms, Lotus, legacy systems? Begin to think about Governance and Compliance
- Determine IT's role – some systems do not require IT for basic functions but do for overall security audit and setting up things like active directory for adding groups/users and permissioning

The Future

- Moving at the speed of light
- New companies constantly upgrading features and services
- New cloud-based systems are challenging SharePoint
- SharePoint is challenging older legacy systems
- Application centric sites are growing
 - CRM
 - HR
- Cloud sites are starting to talk/interact
- Cloud-based IT service and management sites are emerging

The Future Company Today's Company



Google calendar



Google Docs



workday.

