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conceptTaxonomyWorkflow Migration Solution Overview



Delivering Efficiency and Compliance during and after Migration

The conceptTaxonomyWorkflow module delivers workflow capabilities that enable intelligent automatic classification decisions during and after migration. These decisions enhance organizational performance and drive down costs, but more importantly enforce corporate and legal compliance guidelines. For organizations with medium to large free text document collections, this migration is no trivial matter and cannot be performed by human effort alone.

“Organizations are subject to laws, regulations, or other mandates governing the obligation to protect personal information. Violations of these laws can result in civil or criminal penalties.” Recommendations of the National Institute of Standards and Technology www.csrc.nist.gov

Automating Content Migration into SharePoint

Migration to SharePoint presents various challenges at various levels: bulk migration of well managed high value documents, bulk archival or disposition of old or extraneous documents, and finding a way to deal with the poorly classified middle ground. These middle ground document collections contain a variety of documents – some are important, others are ‘nice to keep’ and many are usually irrelevant. Dealing with the middle ground is where many large archive vendor solutions are unable to deliver an intelligent approach; this is where conceptTaxonomyWorkflow delivers value.

To migrate these document collections effectively you need to search the text content of each document to determine its value. This classification must be done before you can make an intelligent decision about how to relocate items during the migration process. This cannot be done manually as the volume is too high and the consistency of human review and decision making is unreliable and too costly.

Protecting and Preserving the Confidentiality of each Document

Migration must also consider the security of the documents as they are moved to their new location. There are two imperatives here; to respect the existing security status and apply the same security in the new location; and to identify sensitive documents that may not currently be in a secure location. Assessing the security needs of these documents requires intelligent interrogation of their content and then comparison to a number of relevant official taxonomies - PII, PHI, ITAR etc. If a document is automatically classified against one or more of these taxonomies it must be given the appropriate security profile.

Document Status	Document Control	Migration Approach
Unique documents with structured text or effective tagging	Well documented due to location or metadata	General Migration Tools
Day to day operational documents, held by multiple staff and departments	Large document volumes mostly unsecured, untagged or misplaced	Require interrogation of each document prior to migration
Sensitive documents held in secure systems	Controlled by senior personnel	Moved from and to well managed secure systems

Fig 1 Intelligent Classification to enhance business performance

Maintaining Security after Migration

General migration tools cannot safeguard document confidentiality because they do not make intelligent taxonomy workflow decisions based on the text content of the document. If this security profiling is not performed during the migration to SharePoint, then many of these documents will be easy to surface using the SharePoint search, breaching the relevant document security obligations. Using conceptTaxonomyWorkflow these documents will be safely routed to the Record Center or any designated secure location with the correct access rights, protecting and preserving documents during the migration process.

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Taxonomy Workflow for Document Migration

Protect sensitive information from exposure with intelligent tagging:

- Secure and compliant document migration
- Enforced governance and reduced costs associated with litigation, PII breaches, non-compliance and federal guidelines
- Automatic monitoring for sensitive documents
- Automatic locking down or removal of sensitive documents during the migration process
- Consistent tagging of content

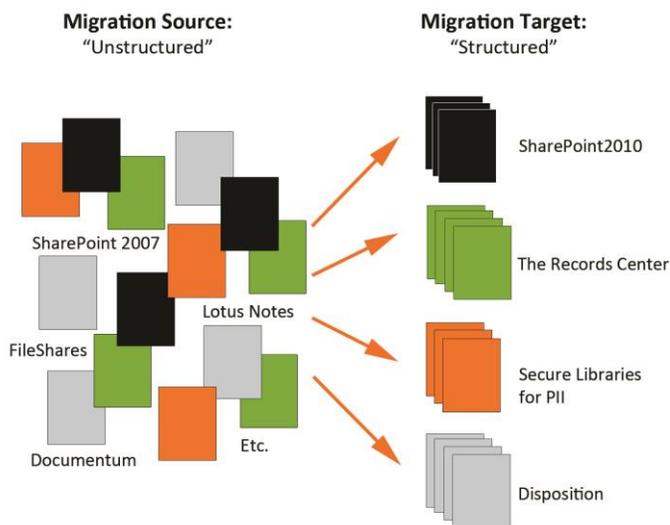


Fig 2 Migrate tagged and classified content intelligently

With conceptClassifier for SharePoint and the conceptTaxonomyWorkflow module organizations can now automate the tagging of unstructured documents to deliver many automated processes.

Migrate tagged and classified content intelligently to locations both within and outside SharePoint:

- Efficient automated migration of large volume projects
- Proven high performance architecture for throughput, multi taxonomy, multi site requirements
- Accurate, consistent and automatic classification using conceptClassifier for SharePoint
- Comprehensive integration with the SharePoint Enterprise Metadata Manager, writing directly to the Term Store locations
- Complementary to general migration tools

Preserve information in accordance with records guidelines by intelligently identifying documents

- Build business specific taxonomies, or import and customize existing taxonomies
- Take advantage of SharePoint Term Store
- Ensure consistent tagging across the organization
- Automatic routing based on the text content of each document
- Ability to add calls to CRM or other databases to add additional metadata

conceptTaxonomyWorkflow

Migrate tagged and classified content intelligently to locations both within and outside SharePoint.

Preserve information in accordance with records guidelines by intelligently identifying documents and eliminating inconsistent end user tagging.

Protect sensitive information from exposure with intelligent tagging.

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