



Executive Brief:

12 Expert Tips for Enterprise Document Sharing, Mobility & Control

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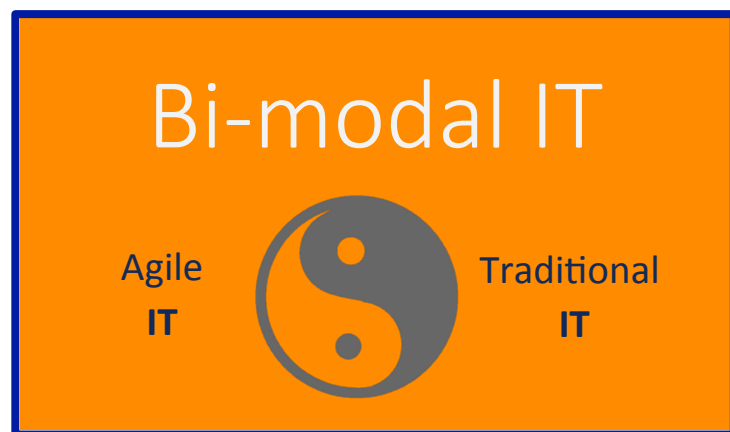
Introduction

Large organizations today live in a rapidly changing world in which information flowing in and out of their IT systems is increasing at an unprecedented rate. At the same time, rapid technology advances have complicated the old order with new demands for greater transparency, file sharing, and changing usage patterns. They need to embrace more open, collaborative work styles and social tools, yet new security threats are appearing almost daily. As a result, the operations of many IT departments are being disrupted by the need to store and manage new types of information in new ways.

Much of this turmoil has been caused by growing internal and external pressures to share more information with the ever increasing population of mobile workers – the distributed workforce – who, armed with their own devices, perform away from the enterprise and are, for the most part, far more agile, independent and needful of access to more information than a traditional worker who performs in a company office. This new mobile workforce is demanding access to gated information so that they can be more productive, competitive and efficient in their work, while at the same time intermixing their personal lives with their business lives more than ever before.

Corollary to this phenomenon is what Gartner has termed a growing need for “digitalization,” which, it explains, is the increasing use of digital technology inside and outside the enterprise. This “third era of enterprise IT” promises to create a tidal wave of data that must be sorted, analyzed and profiled for relevance, sensitivity and timeliness to satisfy various business needs and risks.

This wave of change creates a dilemma for CIOs, Chief Digital Officers and their IT departments. On the one hand, they need to be **agile**; embracing the changes that are occurring in the quantity and characteristics of information being managed, while at the same time facilitating access to it by a growing mobile workforce. On the other hand, they need to protect this information using **traditional** methods to control access, govern, and secure it against new, more innovative threats. Now IT must operate in two modes: Agile and Traditional, coined **Bi-modal IT**.



Of course, responses to these pressures are emerging, not the least of which is a rethinking of IT’s role from a repository and mover of information to a more advanced strategic function as information processor and disseminator, a clearing house and curator, so to speak. Another response has been the growth of the social enterprise – the application of social networking and social media tools to pass

through internal information silos and create internal and external collaboration. The most commonly used tool of the social enterprise to deal with (among other pressures, the increasing use of mobile devices) is enterprise file sync and share (EFSS), which, ideally, creates a collaborative workplace where distributed workers have full access to the same content and capabilities as their counterparts located in the physical office.

According to Alan Pelz-Sharpe, Research Director for Social Business at 451 Research, many Enterprise Content Management systems have struggled with two growing collaboration needs – easily linking external project partners into the content-sharing environment and giving all users access to collaborative content and approval workflows from their mobile devices. Some users have taken to cloud-based EFSS systems to solve the issue while some ECM suppliers have introduced hybrid-cloud extensions of on-prem solutions.

This, Mr. Pelz-Sharpe says in the report *What Are enterprises Really Doing With File Sync And Share Systems?*, has resulted in a dichotomy that exists in the IT departments of large organizations. On one side is “the promise of leveraging the cloud and installing lightweight applications on your own personally owned devices, providing anywhere, anytime access to any file or system.” On the other is “the need for corporate and regulatory compliance, integration with corporate business applications, security concerns, and the enterprise requirement for corporate governance and control.” For this reason, enterprises make large investments in secure enterprise content management systems, the most common of which is Microsoft SharePoint, the system used by the majority of enterprises and government organizations. However, he added, SharePoint is not very well suited for mobile environments, so EFSS systems are being deployed, often alongside SharePoint, to accomplish this new business function. Often, many users have found they preferred the new EFSS system to the traditional SharePoint system.

WORKFORCE NEEDS:
<ul style="list-style-type: none">▪ Mobility / BYOD▪ Work from anywhere▪ Enterprise systems integration▪ Share large files easily▪ Simplicity / ease-of-use
BENEFITS OF SOLVING NEEDS: ENGAGEMENT PRODUCTIVITY EFFICIENCY

This is not unexpected when one considers the contrasting requirements outlined above. For example, today’s workforce expects simple-to-use systems for accessing and sharing their files and applications in the office and when they are on the go. They need mobility, want to choose their own device and the ability to connect their tools to enterprise systems such as email, which is still the most significant collaboration technology in use. They also need remote enablement so they can work, no matter their location. And they want a way to share large files easily since email is wanting in this aspect and the files they share are steadily

increasing in size. Finally, remote workers operate rapidly and they have no tolerance for systems that get in the way of doing their jobs. They want their systems to be obvious, easy to use able to help them to get to what they are doing quickly.

Unfortunately, enterprises and government departments have requirements that are separate from, and occasionally clash with, those of mobile workers. Most importantly, organizations need to ensure that they continue to manage risk even when providing flexibility to the workforce. Legal risks take a number of forms, including data leakage but also stranded information that can become a problem in an e-discovery situation. Organizations also need to exercise some form of control over the content being dispersed, particularly regarding what is sent to mobile devices, which are known to be notoriously unsecure if not managed carefully.

ENTERPRISE NEEDS:
<ul style="list-style-type: none">▪ Control risk▪ Manage content▪ Security▪ Governance & compliance▪ 80-20 Rule
BENEFITS OF SOLVING NEEDS:
MANAGED RISK
SECURITY
REDUCED COST

Therefore, security tools such as encryption or authentication must be employed to reduce the threat of data loss and hacking. Further, in some industries governance and/or compliance are critical. To lower risk, governance should include an assurance that all content is stored in the sanctioned (and commonly understood) places and that employees follow the organization’s rules for how information is managed. Compliance demands that everyone using the system follows the regulations. This can include regulatory compliance such as HIPAA and SOX and rules surrounding the archival of all messages. Lastly, most enterprise content follows the Pareto principle – that only 20 percent of information is critical while 80 percent is merely useful – so it is imperative that there is a strategy in place to protect that integral 20 percent. The remainder must only be managed, and can be done so at a much lower cost.

To achieve results that will meet the needs of both parts of the equation, enterprise IT departments must become bi-modal, delivering on the needs of the enterprise (requiring that the workforce keeps documents and business information in secure enterprise systems, systems that have been vetted by IT and deployed over several years in many cases) and of the workforce (usability, which, if not available, will continue to drive employees to use non-sanctioned tools, bring their own devices, and rely on tools such as Dropbox to share large files and work outside the firewall). It stands to reason, that, in the latter case, if the needs of the workforce are left unmet, the results for the enterprise will be costly, insecure and fraught with legal risk. On the other hand, organizations that embrace bi-modal IT will achieve better business outcomes and maintain a more collaborative and engaged workforce.

Until now, there have been no systems in place that facilitate this important bi-modality.

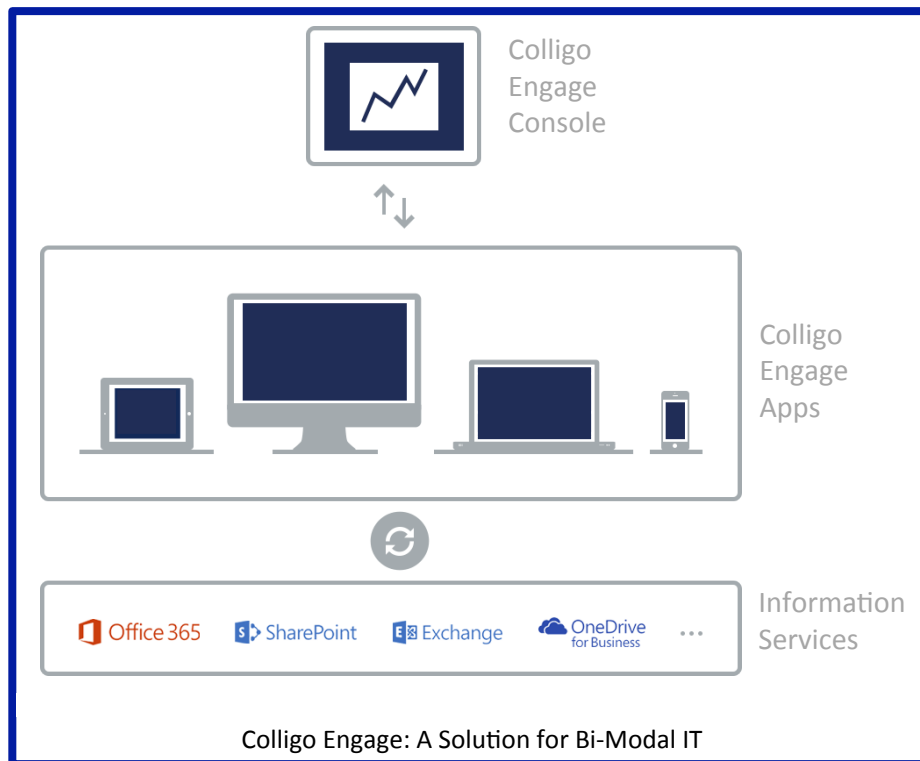
Colligo Engage: A Solution for Bi-Modal IT

The newly-launched Colligo Engage Platform has been built specifically for the problems just outlined.

Colligo Engage helps organizations optimize use of their existing information management systems. It enhances worker productivity by making it easy for employees to access the content they need from any device and wherever they are – in the office, on the road, connected or not. At the same time, Engage helps organizations set policies, manage content, report on usage, and secure information on desktop

and mobile devices. The simultaneous satisfaction of both the need to be agile and the need to be traditional is the essence of what Engage offers.

Disengagement is a continuing problem with SharePoint or other content management systems. Colligo Engage fosters system engagement among employees by making software non-intrusive and easy to use. Because metadata and policies are embedded in the Colligo Engage apps, it is much easier to enforce records management processes, and, importantly, keep employees on corporate systems rather than using consumer cloud apps to store files. Further, Colligo Engage creates IT visibility, enabling IT and business managers to actually see user activities in Colligo Engage apps and identify opportunities for better serving employees, thus increasing adoption.



Engage consists of two primary components:

- The first is a new cloud service, the Colligo Engage Console, built on Windows Azure, that manages the distribution of information, configuration and policies. The Console has the unique capability to track the behavior of users as they work with content through the apps. All user actions – syncing a file, copying a file, moving it, editing, opening, deleting, setting metadata, etc. – are captured and sent to the console for reporting and analytics.

By distributing configuration and policies to the apps, Colligo Engage Console eliminates the need for users to know where the information resides and enables the organization to manage governance. The Console also generates reports of user activity with the information, giving organizations deep visibility into user engagement and enabling them to generate granular reports of user behavior with the information. Through a team of technical consultants experienced with enterprise data security, authentication, collaboration, how to structure

information, records management and governance, Colligo also delivers services to ensure a successful deployment.

- Second is a family of easy-to-use apps that span a worker's desktop and mobile devices and support BYOD. The special sauce here is Colligo's unique, and proven, synchronization technology that supports mobile scenarios by selectively caching content on mobile devices and laptops so it is available offline or online, while offering compatibility with virtually all mobile device management (MDM) platforms including Oracle Bitzer, Good Dynamics, Mobile Iron, IBM Maas 360 and Air Watch.

These apps sync with information services such as Office 365, SharePoint on-premise or hosted, OneDrive for Business and connect Exchange into the solution for integration with email. Colligo Engage apps are also being extended to include other file sharing services, social feeds and messaging services on-premise and in the cloud.

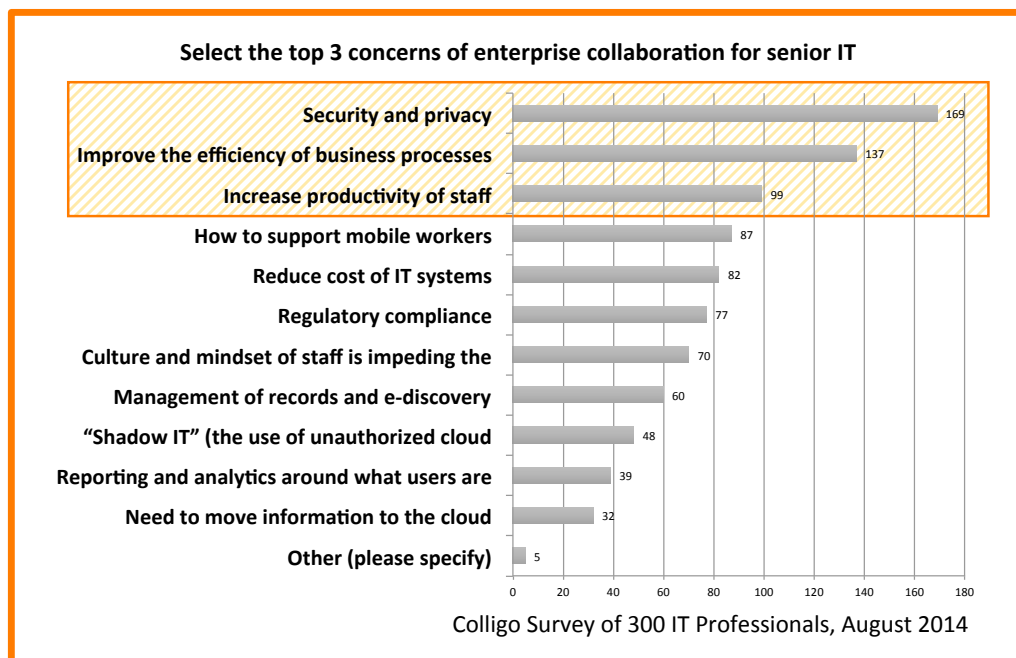
12 Tips To Help You Tackle Mobile Document Sharing

The following tips can help you to think about some of the issues that you will need to address when deploying a mobile document solution for your employees.

1. **Design "Mobile First."** Mobile First is a design philosophy that starts with how mobile workers will engage with the system and then designs around that. Employees expect the ease of use of mobile apps when accessing enterprise data and files, but all too often collaboration solutions are designed for the web and then adapted later for mobile. Colligo Engage has been designed from the mobile viewpoint. Colligo Engage apps have achieved leading positions in app stores and have been adopted by large enterprises and government departments for many mobile use cases.
2. **Solve connection problems by caching.** The remote enterprise system experience can be fraught with usability challenges, so to ensure that remote workforces rely on sanctioned systems, response times must be fast, regardless of connectivity. Colligo Engage uses smart caching to ensure remote workers have the most up-to-date enterprise files, online or offline.
3. **Integrate email.** Email continues to be the most-used business application and is still the number-one method for employees to share files. Employees collaborate, work and live inside email. Colligo Engage apps integrate seamlessly with email and work inside email clients like Microsoft Outlook.
4. **Make it easy to share large files in your sanctioned enterprise systems.** Email is a poor technology for sharing large files so employees often resort to unsanctioned EFSS systems to do their work. By making sanctioned ECM systems as easy to use as EFSS, Colligo Engage helps organizations to simultaneously satisfy the needs of the workforce and of IT.
5. **To enforce, keep it simple.** Deliver on the promise of EFSS by making it clear that employees are expected to use sanctioned enterprise systems – and then make those systems easy to use

so there is a high employee engagement rate. Colligo Engage provides anywhere, anytime fast access and delivers user experiences that match employees’ natural workflows.

6. **Track, don’t block.** Some organizations have reacted to mobile employees’ desire for more easy-to-use file sharing by blocking unwanted services at the firewall, an action that is becoming increasingly difficult since new services are popping up all the time. An alternative method of managing risk – supported by Colligo Engage – is to create visibility into what employees are doing with content on those systems. Tracking provides an audit trail so that risks are mitigated.
7. **Control policies at the device level.** Information management policies enable organizations to control who can access information and what they can do with it. A policy can help enforce compliance with legal and governmental regulations or internal business processes. SharePoint and other ECMs have their own policy settings, but Colligo Engage extends this by introducing policies that are applicable in the mobile world – for example whether certain content is permitted to be synced to a mobile device, or to wipe data remotely from mobile devices when, for example, an employee leaves the organization.
8. **Security and privacy is job one.** A 2014 Colligo survey of 300 IT professionals listed “security and privacy” as the top collaboration concern, far outpacing others. This was followed by “business process efficiency” and “staff productivity.” These three top concerns are connected as part of the collaboration equation. Colligo Engage apps have been rigorously tested by third party security consultants to ensure they are enterprise grade.



9. **Make compliance easy.** Compliance practices, such as storing and profiling content, may be top of mind for IT, but employees are more concerned with doing their work as efficiently as possible. However, failure to follow compliance practices can expose an enterprise or

government agency to significant risk and potentially disastrous consequences. Colligo Engage ensures that organizations can embrace compliance without alienating employees or hampering their productivity by providing easy ways for them to capture and store content and apply metadata, either automatically or manually.

10. Embrace Bi-modal IT. Stick to the knitting, but don't be afraid to try new approaches. With Bi-modal IT, part of an organization works in traditional ways to manage security, risk and integration with enterprise systems – the critical 20 percent – while another part is nimble, and uses agile methods to embrace mobility and the cloud. Colligo Engage is a quick-to-deploy solution that makes it easy to increase user engagement while reducing risk.

11. Choose an extensible mobile platform. A common feature of the mobile world is rapid change, so it is critical that an enterprise work with vendors that provide extension points to their technology. The client-side sync engine in the Colligo Engage apps has an API that enables the rapid development of custom apps. The Colligo Engage Console can be configured manually by an administrator or automatically by other Line-of-Business systems through its API.

12. Work with collaboration tools providers that have deep enterprise experience. Today, many vendors of collaboration tools have come from the consumer application world (the high-growth denizens of Silicon Valley being the best examples) and have no idea of the requirements of enterprise level businesses. Colligo has over 5,000 customers and almost 15 years of experience deploying mobile products to large organizations around the World.

Summary

The world of IT is changing as new technologies are created to allow employees to operate freely outside the constraints of a traditional office. This has resulted in a tension between traditional IT and those who advocate for a less restrictive IT structure in which mobile employees are able to use all the new technologies that appear on the market almost monthly. However, at the enterprise level, IT must be concerned about critical concepts like information security, propriety and usefulness.

To bridge this widening chasm, analysts advocate a Bi-Modal approach to enterprise mobile applications. Agile IT rapidly rolls out updates, changes and evolving technologies that respond to the mobile worker, while traditional IT continues to develop long-term plans and goals, manages budgets, and applies discipline to deployment. Overall, there must remain in place solutions that prevent compromising information governance and security.

To be sure, many risks and potential pitfalls can exist when deploying a solution for bi-modal IT. But if the system is well-designed and deployed intelligently, mobile content management systems can increase workforce engagement and lead to heightened competitiveness. Colligo Engage unites enterprise information systems such as SharePoint, Office 365, OneDrive for Business, Exchange and a growing list of information services through a suite of applications that deliver a seamless user experience across desktop and mobile devices, while providing IT control and visibility via a new cloud service. [Request a trial of Colligo Engage today!](#)