# Instant Messaging as an Enterprise Application

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# Session Description

- **The use of IM has grown organically in many organizations, as co-workers need rapid responses in collaborative efforts. As a result, IT Managers are struggling to support this unofficial productivity tool. This session will be a panel discussion on the technology alternatives for IM and other collaborative solutions including support issues, security concerns, directory services, and implementation lessons learned.**

# Market Potential

- **Today there are over 20 million corporate users of consumer IM growing at 200% a year – Giga Information Group**

- **Nearly 65 million workers using consumer instant messaging, expected to grow to 255 million by 2005 – IDC**

- **By 2004, 60% of real-time communications between users via any means, including voice, text, or call-and response will be driven through IM technology – Gartner Group**

- **Over 2 trillion instant messages between consumers and businesses by 2004 – IDC**

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# Key Issues and Questions

- **What business needs are driving the use of IM in corporations?**

- **What are the security and auditing issues/regulations around the deployment of IM?**

- **Is a publicly provided IM solution, such as AOL IM, really free?**

- **How can enterprise directory services, such as Microsoft's Active Directory, be linked to an IM solution?**

- **Is there an ROI from Instant Messaging?**

- **What applications/industries are the early adopters for Enterprise IM?**

- **How will IM platforms integrate with Enterprise Applications (e.g. SAP)?**

- **What impact will standards such as SIMPLE\* have on IM acceptance?**

\* Session Initiation Protocol (SIP) for Instant Messaging and Presence Leveraging Extensions

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# Panelists

- Ed Simnett - Microsoft
- Larry McCants - IBM/Lotus
- Vince Fournier - Unisys
- David Pulaski - IM-Age

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# Question and Answer Session to Follow

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# COMNET
# Conference and Expo
## Washington D.C.

### January 29, 2003

David Pulaski, CEO

*IM-Age Software helps organizations capture and secure instant messaging (IM) communications so they may harness its potential as a business application. Our primary focus is securing all public IM platforms and bringing them into compliance with corporate and industry regulations in a cost effective way.*
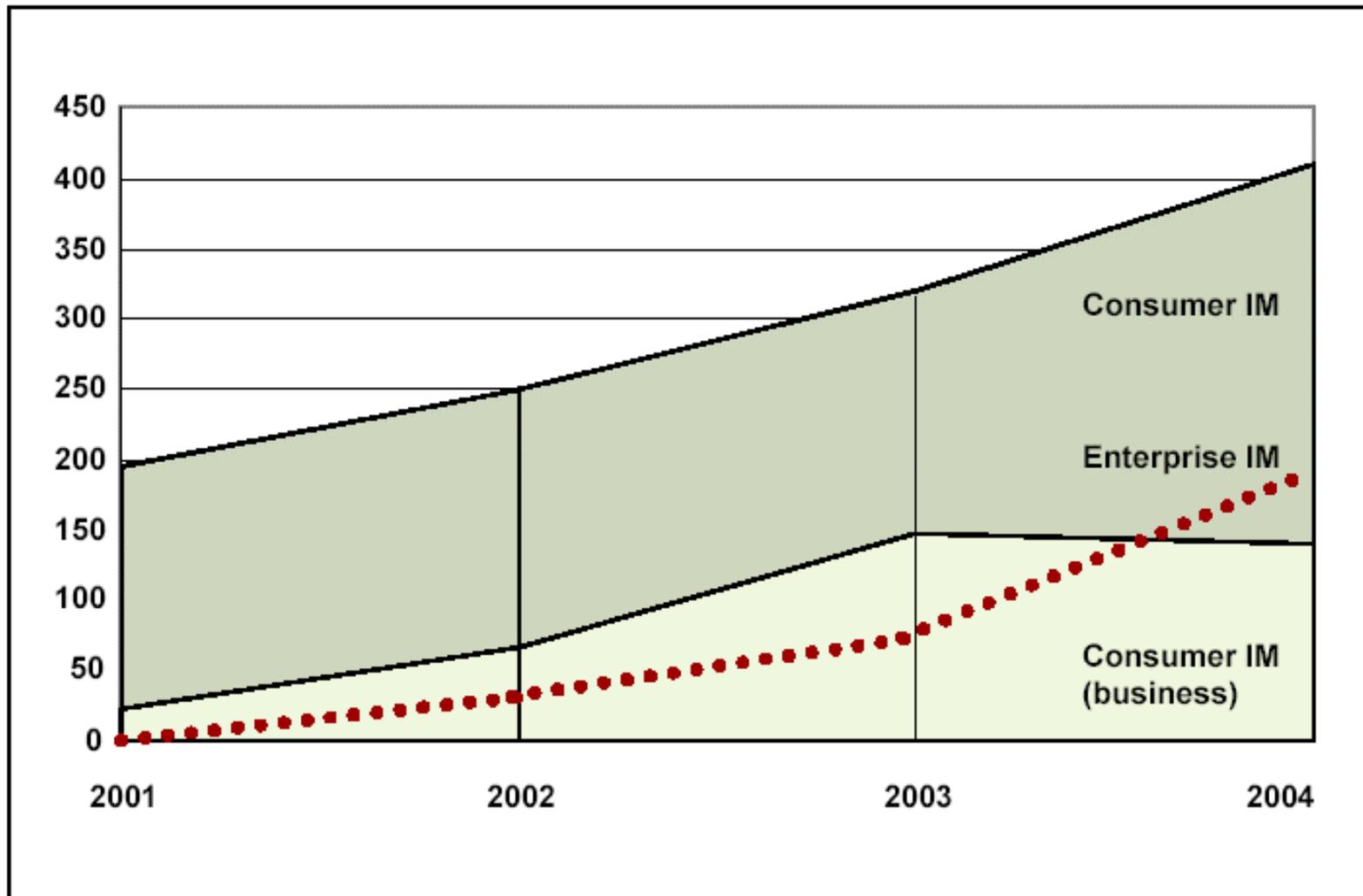
Source: Giga Information Group

# Why public IM should be managed

- Loss of data
- Decrease in employee productivity
- HR and policy violations
- Corporate espionage
- Loopholes for legal disclaimers
- Legal exposure
- IM borne viruses
- Identity theft
- Eavesdropping

- Corporations can control who uses IM & how they use it
  - Defensive strategy (Security)
  - Offensive strategy (Productivity)

- Leverage IM technology for other applications
  - CRM
  - Help Desk
  - Trading
  - Procurement
  - Etc.

- Keep all options open and prepare for change

- Choose solutions that work with your HR resources & budget

- Struggles with implementation lead to long term difficulties

- Avoid solutions that do not map to employee responsibilities

- Invest in "Future Proof" technology

- Take advantage of free technology that gets the job done

- Companies should focus on their core competencies and leverage the strengths of competing, IT vendors

**IM·Age** software

**Calpine Energy**

- – Purchased originally for trading floor and corporate policy compliance
- – Initial purchase of 300 seats then purchased an additional 5,000 seats
  - • **Based on users' demand for public IM networks**
  - • **Quick client installation with ability to be installed/run in 'stealth' mode**
  - • **Did not require reconfiguring of the firewall**
  - • **Did not require that each client be reconfigured for a proxy server**
  - • **Redundancy was stronger in IM-Age**
  - • **Low cost per user**
  - • **Disclaimer notice capable**
  - • **Flagging of keywords**
  - • **Individuals can view own 'recording'**
  - • **Option of selective encryption**

# Three phases of controlling public IM

**Phase 1
TOTAL DENIAL**

**Phase 2
SELECTIVE
RESTRICTION**

**Phase 3
ENTERRPISE-
WIDE USE**

- **Block all IM Traffic**
- **Be alerted if policy is breached**

- **Block / allow certain users**
- **Choice of public or private client**
- **Enhance IM for certain users**

- **Allow all users to use IM**
- **Use all Public IM platforms with limitations**
- **Enhance IM for all users**

Where do you fall today?

- Offensive Strategies (Productivity)

  – Reporting (web and desktop)

  – User Productivity Enhancements

  – Broadcasting / Forwarding of IM Sessions

  – Fault tolerance

# Phase 2: Selective restriction to certain employees

- Defensive Strategies (Security)
  - Capture encrypted and off network conversations
  - Store all IM conversations (public and private)
  - Blocking / Restriction
  - Disclaimers / Legalese
  - Reporting and alerting
  - Virus protection
  - Encryption
  - Content Filtering
  - Authentication

IM-Age Software

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Suite 120

Houston, TX 77027

Ph: 877.232.6333

Fx: 713.521.9776

www.im-age.com

**Lotus** software

**IBM**

"Outside the Yellow Box"
Advanced Collaboration

Larry McCants
IBM

IBM Software Group

# Sametime Technology: Inside the Yellow Box

## Awareness
► Presence lists
► People links
► Place awareness

## Conversation
► Instant Messaging
► Group Chat
► Audio Video over IP
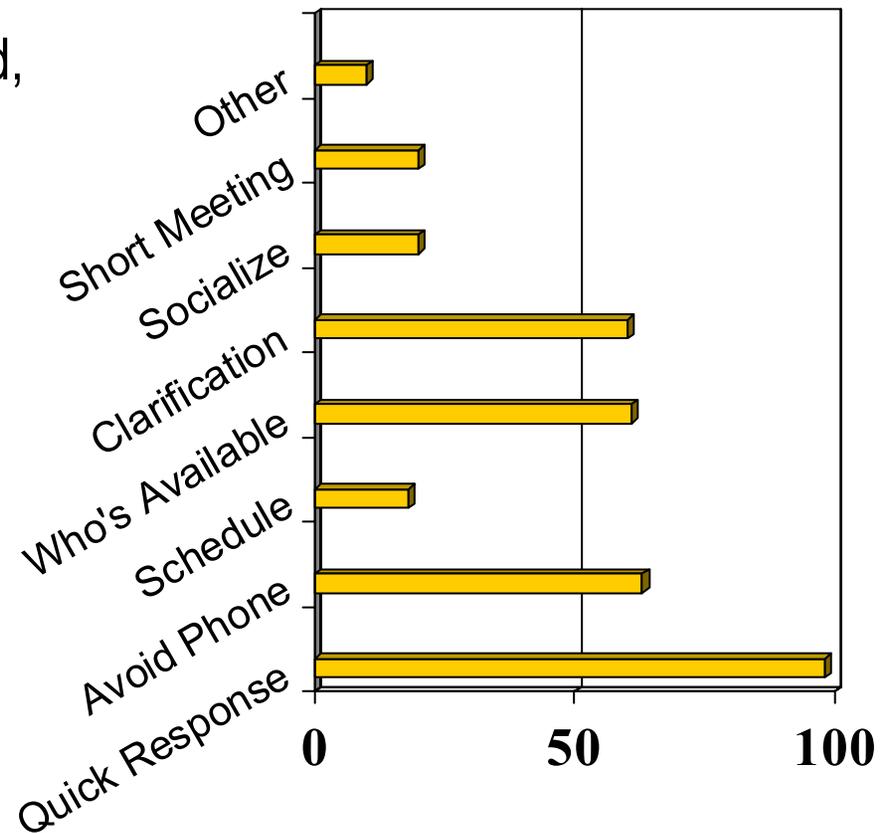
## Shared Objects
► Whiteboard
► Applications
► Entire PC
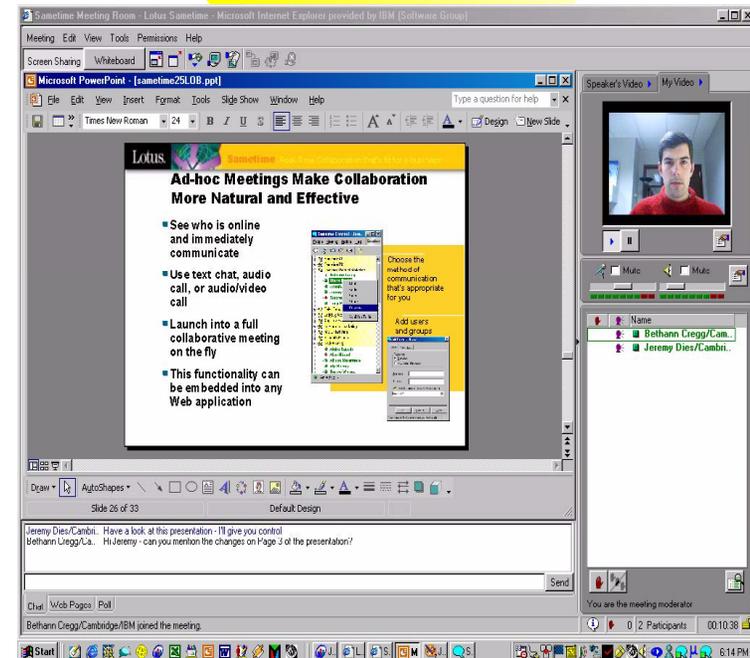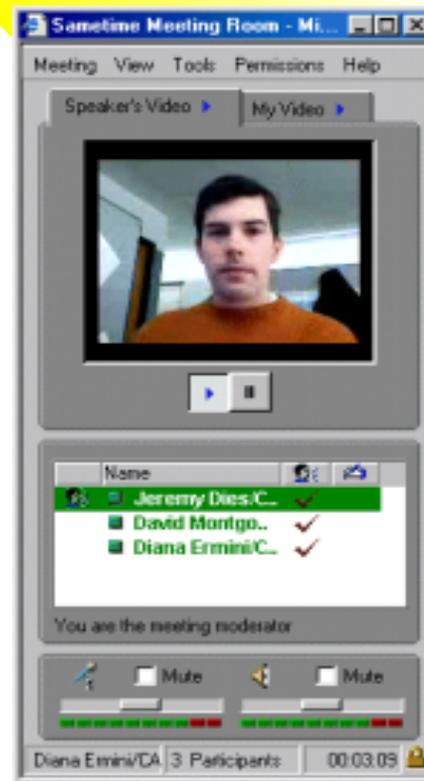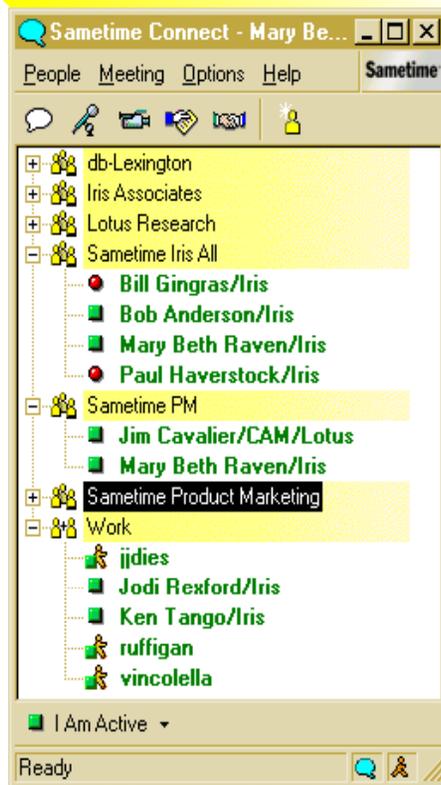
# Culture Impact of Collaboration

**IBM Survey of Sametime end users:**

"Very Much Decreased, Decreased, Somewhat Decreased..."

- 72% for Phone
- 85% for e-mail
- 45% for Pager
- 69% for Voice Mail
- 54% for Face-to-face meetings

- 96% Say they IM with Team members

# Examples of Contextual Collaboration

(Using shipping technology!)

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Google ▾   [                    ] ▾   🔍 Search Web   🔍 Search Site   PageRank   🛈 Page Info ▾   Up ▾   ✏ Highlight

Address 🔗 http://w3.lotus.com/   ▾   Go

## w3✳

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IBM.

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February 20, 2002

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> Register: 7th Annual IBM/Lotus Technical Forum

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# More than Just Instant Messaging

- Functions
  - Event Triggers – Presence, Status, etc…
  - Real time delivery
  - Presence as a event trigger or for workflow control
  - Routing other content types beyond text
    - Forms, files, images, (rich content)

- More than just People to People
  - People to People - Standard Chat
  - People to Applications - Sametime BOTS
  - Applications to People - Approve Expense Report
  - Applications to Applications - Coordination (Web Services)

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**w3**   **Lotus Software Intranet**   IBM

BluePages     Search     HelpNow     Feedback

February 24, 2002

Scorecard:
IBM STOCK
Quoted at 4
→ EXPAND

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> PartnerWorld 2002
  Lotus QuickPlace Drives Hyundai

## Virtual Customer Service

>Please click here for more information around our customer service Robots

■ **customer_service**

### Send Message

To:   whatis@us.ibm.com

Where is my order #2345987

Send     Close

# Trade Notification: Application to Person Example

**Trader**

**Enter Trade Into System**

**Transaction System**

**Transaction Complete**

Chris Crummey/Cambridge/IBM [start...

Meeting   Edit   Help

Chris Crummey/C...  Your Trade of IBM Stick for Amy Currie is
complete at 1000 shares at 125.56

Type your text

Send   Invite Others...   Close

Waiting for response...

**Sametime Server**

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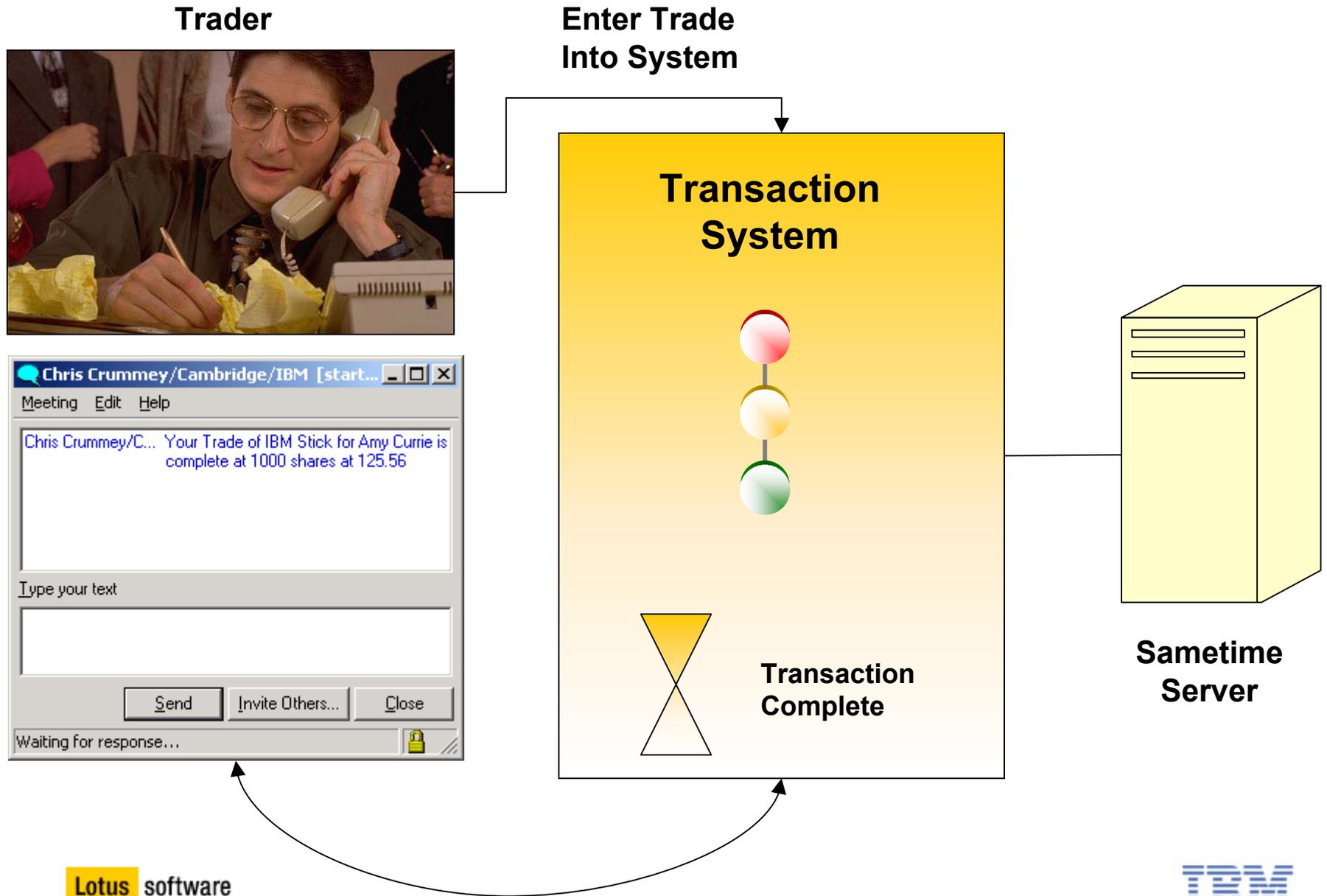
# Financial Services Companies have the following needs:

- Need to maintain security and ease of use
  - Authentication
  - Repudiation
  - Flexible access
- Need to meet regulatory compliance
  - SEC, NASD, OCC mandate client interactions be logged and managed
- Interoperability
  - Need to connect outside own network
  - Must maintain total control

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# Security and Extensibility

- Authentication of users to LDAP or custom directory

- Repudiation – ST Server tracks who exactly logs on, who failed, why, and when

- 128 bit encryption across the board

- Complete control over exactly who can access your directory and server

- Flexible APIs to completely customize your environment

  – Embed awareness and IM

  – Brand your own client

  – Customize the meeting center

- Wireless access to awareness and instant messaging - TODAY

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# Sametime Logging Capability

- Meet SEC 17 and NASD 3101 regulations 1 of 2 ways:
  - Use the Sametime Chat logging API to customize what you need. You can store user ID, time, event (log on/off, etc), IP Address, application type …
  - Use a partner Solutions that leverage ST 2.5's logging capabilities that are specifically designed for compliance:
    - Redmind Genius Archive
    - Principle Software Sametime Chat Logging
    - FaceTime IM Auditor

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# Sametime Management capability

- Store any/all chats and log-in and log-out data

- Stores failed log-in attempts

- Stores peak usage reports, capacity warnings, usage limits, disk space, server memory

- Search logs as text files, through Notes views, or with advanced features provided by the Redmind, Principle, or FaceTime solutions

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# Summary

- Sametime is an industry defining product
    - First business IM solution in Jan. 1999
    - Undisputed leader in enterprise IM and Web Conferencing
- We understand the needs of financial services companies
    - Security and extensibility
    - Logging and manageability
    - Interoperability
- We provide a solid and flexible platform on which you can grow

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# More Information:

- SameTime Information:  www.lotus.com/sametime
- Partner Technical Information:  www.notes.net

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