



15-Minute Guide to  
**Extended Enterprise Collaboration**

## Foreword

For you as a business professional, time is a precious commodity. You constantly need to distill concepts, evaluate options, and manage complex transactions. When you need information, you need it in a form that can be quickly assimilated—forget the mind-numbing detail and get to the point.

With that in mind, we've developed our series of 15-minute guides to essential topics in information management. This particular guide focuses on extended enterprise collaboration—specifically comprehensive business-to-business collaboration.

In about 15 minutes, we'll examine the need for extended enterprise collaboration, explain why e-mail and general use collaboration tools are inadequate alternatives, and outline the features of a comprehensive solution and why they're important. Finally, we'll provide an overview of the EMC® Documentum® CenterStage® offering and explain why other solutions don't measure up. We think you'll agree that it will be 15 minutes well spent.

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## Introduction

### Extending the enterprise

The extended enterprise. What is it? It's not easy to define and it's different for every organization. Most businesses are extending their enterprises every day in order to grow and adapt to new competitive pressures, seek out new opportunities for reducing costs, and try to find ways to increase customer loyalty. Companies are increasingly relying on partners from around the world to provide meaningful services at a lower cost than they could themselves. They look to offshore suppliers to shrink delivery times in an effort to speed time to market for new products. Or they partner with other firms to add technology to a product without developing the technology themselves.

The benefits of the extended enterprise are many:

- Faster time to market with goods and services
- Reduced product development costs
- Rapid access to a broader pool of knowledge or expertise
- Closer interaction with customers resulting in higher satisfaction

Extended enterprises are also being formed because companies are keeping costs low by allowing their employee base to work in the ways that suit them best.

### The need for extended enterprise collaboration

The need for collaboration in business is not new. In fact, organizations have been collaborating internally for years. For example, a product manager in a manufacturing company that is building a new widget will interact with employees from design, engineering, sales, and marketing. Insurance agents must work with underwriting, field agents, and customer service managers to process a claim. And a customer service agent at a retail call center collaborates with a global team of agents to push last minute sales information, receive feedback on promoted products, and other actions.

But in order to collaborate beyond the enterprise with external parties like partners, contractors, customers, or suppliers, e-mail is often the only option. And while users have been using e-mail as their extended enterprise collaboration tool, this method introduces risk and increases costs. Businesses need a way to interact seamlessly across the extended enterprise so that internal parties can work with external parties and not rely on e-mail to do so.

**The term extended enterprise collaboration refers to an enterprise's ability to extend its collaboration processes beyond the firewall and include outside vendors, suppliers, and even customers in the same working environment. Extended enterprise collaboration allows businesses to work securely across organizational boundaries and provides superior company-to-company collaboration.**

When done correctly, extended enterprise collaboration can help organizations reduce costs in a rough economy, mitigate risks brought on by increasing regulatory requirements, improve customer satisfaction, and seize growth opportunities by enabling employees to make better decisions faster—all without reliance on e-mail.

Extended enterprise collaboration also addresses another knowledge worker issue: the desire to communicate and share information via social collaboration tools such as wikis, blogs, RSS feeds, discussion forums, tags, and others. Today's companies are looking to bring these modern collaboration capabilities inside the organization in a responsible way.

### The trouble with e-mail

Collaborating and collaborating effectively are two different things. Unfortunately, today most extended enterprise collaboration is done through e-mail—the poor man’s collaboration tool. Relying on an e-mail system for project or team collaboration efforts creates risk, increases costs, and reduces efficiency. The disadvantages of using e-mail for external collaboration include the following.

- **Lack of versioning:** Creates confusion over what is the latest material and often results in duplication or rework because workers make decisions based on the wrong content. Using e-mail as workflow also leads to poorly managed reviews, creating inefficiencies.
- **Lack of visibility:** Because information is being shared via e-mail, individuals and teams don’t have a clear picture of what other individuals and teams are doing. Visibility is limited to those on the “To” and “CC” lines.
- **Inability to find information:** Business-critical information held in individual e-mail accounts rather than a centralized repository means information cannot be searched by knowledge workers and cannot be repurposed.
- **Increased storage costs:** Storing critical business information in the form of e-mail and attachments creates overloaded e-mail servers with huge storage requirements.
- **Increased risk:** Reliance on e-mail means policy management cannot be applied to e-mail data and that there is no audit trail, exposing the company to governance, regulatory, and e-discovery risk.

### Why internal collaboration tools won’t help

So what’s wrong with simply using general purpose collaboration tools to collaborate with the extended enterprise? It’s true that these tools are easy to deploy and simplify organizational communication. But they can also dramatically increase costs and risks, and create process inefficiencies when deployed for external collaboration purposes.

General purpose collaboration tools aren’t designed for extended enterprise collaboration or business-to-business functionality and, as such, are not able to provide that capability out of the box. For example, to add external members to a workspace, these tools either require extensive customization or IT to update the Active Directory or LDAP. This requirement can create an IT bottleneck and add delay to a process which is supposed to speed collaboration.

For example, imagine a project team formed around a new product launch. The team involves internal members from marketing, product management, pricing, and public relations. The team decides to utilize the company’s general purpose collaboration platform to collaborate on the project. With the tool, they collaborate on documents such as press announcements, product specs, data sheets, and others; and communicate with team members.

Midway through the project, the team decides it needs to pull in its PR firm and ad agency. But employees from these firms don’t appear in the Outlook address book, and therefore can’t be added to the collaboration space. The team leader quickly contacts IT for help in adding the external reps to the Active Directory or LDAP, but is told it will take a couple of weeks. Not wanting to derail its schedule, the team leader decides to communicate with the external parties via e-mail. This leads to confusion over document versions and inefficiencies. It also puts the company at risk because documents and context are no longer lifecycle managed or available for e-discovery requests.

In addition, some general purpose tools focus on a single collaboration method, such as wikis or basic content services—for example, check-in/check-out functionality; but they don’t provide the comprehensive functionality found in extended enterprise collaboration solutions. Internal tools also don’t provide true visibility. Teams can share information, but can’t see what’s going on within other teams—which can result in duplicate work and lack of expertise utilization. Some of these tools also lack granular controls for security and do not natively provide the ability to apply policy management to information enterprise wide—a key weapon in companies’ arsenals to mitigate risk.

## Extended enterprise collaboration solutions: What to look for

Many companies claim to provide extended enterprise collaboration solutions, but not all solutions are created equal. Here are the key features to look for in a comprehensive solution and why they are important.

- **Easy collaboration across firewalls:** The ability to collaborate across the firewall seamlessly, without hassle, is perhaps the most important aspect of an extended enterprise collaboration solution. A comprehensive solution will enable the addition or deletion of members—both internal and external—without IT involvement. The solution should also include roles and permissions security features that limit external members' visibility to only the appropriate content.
- **Team-administered workspaces:** Team workspaces, at the heart of extended enterprise collaboration, should not require IT involvement to launch or maintain. Out-of-the-box tools and templates should make customization easy.
- **More efficient search across multiple sources:** With the typical knowledge worker spending six to ten hours per week searching for information to do their jobs, efficient search is crucial. The search mechanism should include the ability to search multiple sources—both internal and external—with one query, rather than searching application by application. Knowledge workers should have the ability to view search results in the way that works best for them.
- **Policy-based control over all content:** A solution should include the ability to set and maintain policies for all content. Doing so enables organizations to meet governance, regulatory, and e-discovery requirements.
- **Lifecycle management of collaborative process:** Few solutions on the market offer this feature, yet it is one of the most important. Managing the lifecycle of all content objects in the collaborative process is crucial to not only avoiding risk, but also managing storage costs. Lifecycle management should apply not only to files such as Microsoft® Office files, PDFs, videos, audio, and others, but also to objects such as wikis, blogs, discussion forums, and the entire collaboration workspace. This control enables the ability to manage retention, disposal, and storage tier.
- **Enterprise scalability:** The solution should be robust enough to handle billions of objects, be accessed from remote locations, and yet still provide the same high performance.

## Extended enterprise collaboration in action

Extended enterprise collaboration can benefit all kinds of organizations. Below are two examples of how the technology can benefit today's companies.

### Product development

To develop the best possible product in the most efficient manner, companies must involve people from across the organization in different functional areas (design, product management, marketing, engineering, and others) to create the design.

Ideally, these businesses will reach beyond their firewall to key stakeholders—a small group of top customers, key suppliers, an advertising firm, partner companies, and others—to receive feedback on the early designs to ensure they are building a compelling product. Receiving stakeholder input early on in the design phase helps ensure the product will meet with market acceptance. Using a comprehensive extended enterprise collaboration solution enables companies to gain this feedback efficiently and with security controls in place.

For example, an automotive company begins work on a new car design. A team is formed that is not only cross-functional, but also involves team members outside of the firewall. Early external team members include strategic partners with whom the team shares early sketches and ideas. As the project progresses, the team contracts with an outside consultant and shares the designs with a few key customers to gain early feedback often and produce a product that is embraced by the market.

Utilizing a general purpose collaboration tool for this process would require either extensive IT involvement or the use of e-mail in order to involve external parties—introducing inefficiency and risk. But by utilizing a comprehensive extended enterprise collaboration tool, team members outside of the firewall can be added to the workspace easily without IT involvement. And, all files, comments made to files, discussion forum postings, and other objects are managed according to policies.

### **Vendor management**

Using extended enterprise collaboration for vendor management provides both the company and its vendors with a secure workspace where they can exchange information. A comprehensive solution will feature a granular security model. Such a model ensures that vendor A only will see the information that pertains to it, and not, for example, the contracts or other private documents that vendor B has in process with the company.

For example, an engineering firm embarking on the construction of a new building hires a general contractor to manage the project. This general contractor is responsible for multiple deliverables with many subcontractors and must have visibility of the entire project. As the project progresses, new subcontractors are added constantly.

If the firm employed a general collaboration tool to enable all parties to collaborate and manage content related to the new building, it would be forced to resort to e-mail to collaborate with outside parties (introducing inefficiency and confusion) or constantly involve IT to add new parties to the workspace (introducing delay). If all parties are eventually added to the workspace, the firm could not control who has access to what documents, meaning that subcontractors could view private documents of other subcontractors.

By contrast, utilizing a tool built for extended enterprise collaboration means that the general contractor can add external parties without IT involvement and all parties can utilize the workspace. The granular security controls ensure that subcontractors can access only appropriate documents and not the private documents of other subcontractors.

## **EMC Documentum CenterStage: Fulfilling the promise of extended enterprise collaboration**

The standard for extended enterprise collaboration, EMC Documentum CenterStage enables organizations to collaborate internally across functional lines as well as externally across corporate firewalls. Out of the box, CenterStage provides the ability to add external members without having to update Active Directory or LDAP. This feature saves time, avoids IT bottlenecks, and speeds the collaborative process. CenterStage enables business-to-business collaboration with the key partners, customers, suppliers, and outsourcers that organizations rely on so heavily to reduce costs, increase revenues, improve customer retention, and make better decisions faster.

CenterStage provides the following benefits:

### **Reduces operational costs by improving productivity**

- Minimizes the costs and risks associated with using e-mail as a collaborative tool
- Speeds contributions from external parties without burdening IT
- Helps workers find information faster with fewer searches

### **Accelerates processes and increases operational agility**

- Allows knowledge workers to discover and access relevant information via a single query—regardless of where the information resides
- Enables knowledge workers to make better decisions faster
- Helps bring products and services to market faster

### **Addresses governance, risk, and compliance needs**

- Provides industry-leading information controls right out of the box
- Protects information from the core to the edge; uniquely preserves context and content
- Ensures policy-based approach to information management across extended enterprise

## **Key features**

### **Secure collaborative workspaces**

Eliminating the silos. It's a critical component of true collaboration and the best way to enable the best ideas to be translated into action. CenterStage features customizable team workspaces that break down formal and informal information barriers and make collaboration easier. These workspaces are team administered and are easy to launch and manage via a widget toolbar that makes customization easy.

Users can easily set lifecycle controls, roles, and permissions for members, and set workspace content policies to ensure compliance with governance, regulatory, and e-discovery mandates. Members, both internal and external, can be added or deleted with ease, without IT involvement.

### **Federated search**

Application-by-application searches are a colossal waste of time. The federated search feature of CenterStage enables users to search a limitless number and type of information sources with a single query. When results are generated, they are automatically filtered into facets (metadata). The user can customize a given search by filtering for a specific file format or location (for example, only internal workspaces). These filters are dynamic, enabling changes to be seen immediately. CenterStage is unique in featuring both comprehensive federated search and automatic entity extraction capabilities.

### **Data tables**

CenterStage provides standalone data tables to facilitate the management of content collections. A structured arrangement of related content organized into fields and columns, data tables offer an ideal way for teams to manage information such as contact information, list of planned projects, action items, etc. Much like a person's listing in a traditional telephone book (name, street address, and phone number), data tables organize information into a series of related entries, making them a useful way to manage information as simple as a to-do list, or more complex information, such as an inventory-tracking data. With standalone data tables, information becomes easy to manage, track, and update, helping people and teams be more productive

### **Easy membership control**

CenterStage is unique in its ability to allow users to add external members without updating LDAP or the Active Directory. Other general purpose solutions require either extensive customization of the solution or heavy IT involvement each time a new external member is added. Also, the granular security model of Centerstage ensures that external members have visibility only to appropriate information.

### **Web 2.0 for the enterprise**

CenterStage provides a wide range of modern collaboration tools for secure sharing of ideas. Blogs, wikis, discussion forums, RSS publishing, user-driven tagging, inline authoring, and others provide today's knowledge workers with tools that they are accustomed to using. These capabilities provide collaboration with context—the ability to see inter-related items and information in one view.

### **Compliance and control over your entire collaboration network**

While content stored in e-mail servers is not policy-managed, not archived, and unsearchable, CenterStage content is securely archived and can be managed by policies throughout its lifecycle, reducing risk from non-compliance and e-discovery requests. Centerstage is natively integrated into the EMC Documentum repository—widely recognized as the most secure content repository in the industry. The Documentum repository features encrypted communications between the repository, clients, and applications, and enables flexible and comprehensive authentication, authorization, as well as audit access and control. Documentum ensures that content is complete, accurate, and protected from inappropriate use or disclosure.

### **Lifecycle management of all objects**

CenterStage allows for lifecycle management of all content objects. Policies can be applied not only to files of all types, but also to Web 2.0 objects such as wikis, blogs, discussion forums, workspaces, and others.

### **Enterprise performance**

CenterStage is built on the Documentum platform and can manage billions of objects without adversely affecting performance. Other backend Documentum products also ensure that this high performance is present whether at company headquarters or remote offices.

## Take the next step

Collaborate with your extended enterprise without the risk. To learn more about how extended enterprise collaboration can benefit your organization, visit [www.EMC.com](http://www.EMC.com) or call **1.800.607.9546** (outside the U.S.: +1.925.600.5802).

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