

Business Value with CA

CA Message Manager's

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Stephen Barry,

Network Infrastructure Lead Architect,
William Blair & Company



William Blair

CA Message Manager Provides a Scalable Centralized Repository That Gives William Blair the Ability to Apply Policies to New Messages, As Well As the Entire Archived Pool

Customer Profile:

(January 2005)

William Blair & Company
Chicago, IL
www.williamblair.com

Industry:

Financial Services

Employees:

950

CA Products:

- CA Message Manager Archive
- CA Message Manager Discovery
- CA Message Manager Supervision

CA Services:

- CA Data Migration Services

Integrity

William Blair & Company, L.L.C. is an investment firm offering investment banking, asset management, equity research, institutional and private brokerage, and private capital to individual, institutional, and issuing clients. Since 1935, they have been committed to helping clients achieve their financial objectives. As an independent, employee-owned firm, William Blair's philosophy is to serve their clients' interests first and foremost. They place a high value on the enduring nature of their client relationships, the quality of their products and services, and the continuity and integrity of their people.

Unify and Simplify

William Blair & Company installed the CA Message Manager suite (formerly Assentor Enterprise from iLumin) of email management products in 1998 to archive emails for its 950 employees to comply with SEC regulations. The firm has been capturing more than 30,000 Microsoft Exchange emails a day, along with instant messages and Bloomberg messages.

Based on its success with CA Message Manager, William Blair took advantage of CA's Data Migration Services group to move its existing optical platter storage system to a searchable online storage system.

During the 1990s, William Blair's offline storage system, like many others of the day, was based on the "optical jukebox" platform. In other words, a jukebox would hold about 50 optical platters, or CD-style discs, that contained old emails, attachments and all forms of electronic data.

As part of this system, William Blair had to move archived messages from the CA Message Manager servers to the optical platters. This process was very time consuming and presented many problems during the life of the platters. For instance, when purging email records from the system, users had to physically break the platters. In addition, audits would require at least one IT person to physically load the appropriate platters to search the email archive.

Key Benefits:

- IT support no longer needed in Audit process
- Single storage solution keeps storage costs down
- Allows for timely response to discovery requests

CA Advantages:

- Architecture
- Unmatched monitoring and reporting
- Accurate and comprehensive searching
- Dramatically improves email performance and protection

Key CA Message Manager Archive Features:

- Single repository
- Easily scalable
- Easily managed
- Single Instance Storage

Key CA Message Manager Discovery Features:

- Export feature provides quick content sharing without having to conduct multiple searches
- Accurately identifies content
- Quarantined results saved in user-defined folders for further analysis

Key CA Message Manager Supervision Features:

- Review of quarantine messages
- Automatic content filtering

IT Environment:

- Exchange 2000
- Distributed mail stores

During the migration project, CA's Discovery Services group moved three years and 2.4 terabytes worth of archived electronic message data onto Network Attached Storage (NAS) devices. From the NAS devices, CA migrated the data to an EMC Centera Content Addressed Storage (CAS), which is SEC compliant in that it archives data in the Write Once Read Many (WORM) format.

Now with CA Message Manager, users can search the entire online storage system in a matter of seconds with no need for human intervention. "Audits no longer require the support of an IT staff member, increasing the efficiency of the auditors as well as our own internal compliance group," says Stephen Barry, William Blair's Network Infrastructure Lead Architect.

"The migration project has been a tremendous success," says Barry. William Blair now has more than 25 million items and four terabytes of data stored on the new CAS and CA Message Manager continues to archive new messages to this online storage system on a daily basis.

With the data in one centralized repository, William Blair is able to apply CA Message Manager policies towards new messages and the entire archived pool.

In addition to CA Message Manager Archive, William Blair also uses CA Message Manager Supervision (formerly Assentor Compliance) to review message content and CA Message Manager Discovery to perform comprehensive searches of the message archive.

According to Barry, CA Message Manager's "automatic content filtering and indexing is superior to any product on the market today, and it enables us to receive near-immediate results to our archive searches."

The William Blair compliance division uses CA Message Manager on a daily basis to review quarantined messages and conduct archive searches for compliance and litigation. "The compliance group relies heavily on CA Message Manager Discovery's export features to share discovered content with the appropriate executives and legal teams," Barry said.

"The simplicity of the user interface for both our compliance department and outside auditors makes CA Message Manager the only feasible choice for William Blair's electronic message management needs," Barry said.

With CA Message Manager in place, William Blair has the comfort of knowing that their email infrastructure is now "future-proof." "By our best estimates, [CA Message Manager] can easily scale to five times the number of messages we are currently archiving daily. It's a comforting thought, as electronic communication continues to expand on such an exponential basis," says Barry.

For more information, call 1-800-619-1408 or visit ca.com.

