

# EMC Documentum Records Manager

A trusted solution: Helping hundreds of companies comply with regulations, avoid financial penalties and mitigate risk.

## The Big Picture

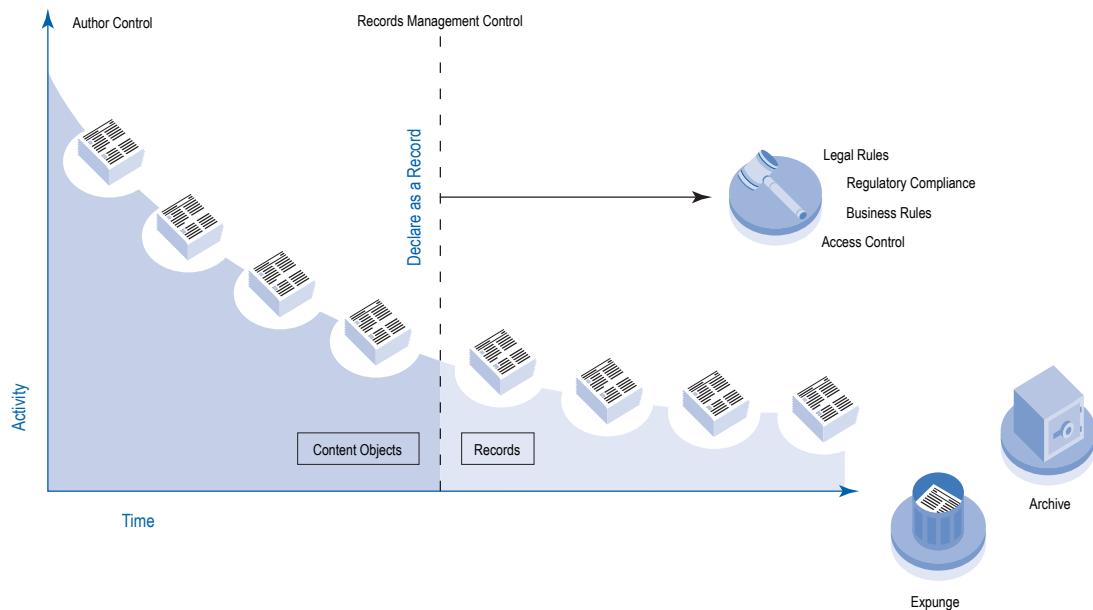
- Enables a balanced approach, leveraging both automation and human judgment to optimize record retention decisions
- Simplifies record declarations for paper, e-mail, and electronic documents
- Enables fast and accurate retrieval of records
- Lowers discovery costs and the likelihood of penalties
- Retains e-mail and other records for improved knowledge management
- Certified and accredited against DoD5015.2, UK-PRO, and Australian VERS
- Built by a proven leader in records management with 10 years of successful deployments

Many organizations today face the very real risk of being audited or sued. A growing body of regulations has raised the stakes by requiring that e-mail, paper, and electronic documents be classified, stored, and accessible to achieve accountability. But most corporate records are ignored, misfiled, or retained longer than required, driving up the cost of storage and access while increasing the likelihood of noncompliance and financial penalty. As a result, all companies today must ask themselves some very important questions:

- Are we retaining and protecting documents that could be legally defined as records?
- Are we destroying materials as soon as regulations and good business practices allow?
- Could we supply information relevant to an official inquiry without incurring substantial discovery costs or disrupting normal business functions?
- Can we audit and monitor our organization's actual record-keeping practice to measure compliance with stated policies?

## Understanding records management

What's the difference between documents and records, and when do documents become records? All documents that provide evidence of business decisions, agreements, or activities should be protected as records. Similarly, documents that demonstrate compliance with or were identified by regulations mandating document retention should also be protected as records. Finally, any document related to matters which are expected to result in litigation must also be retained. Regardless of the reason, once a document is declared as a record the content it contains comes under corporate control and is subject to legal rules for retention, access control, and eventual disposition.



*With Documentum any content can be declared as a record, making it subject to enterprise retention and disposition rules.*

## Introducing EMC Documentum Records Manager

A comprehensive records management solution must enable an organization to implement procedures for storage, retrieval, dissemination, protection, preservation, and destruction of recorded information associated with all business operations. With EMC® Documentum® Records Manager, organizations can:

- Set up and edit a “file plan”
- Easily declare objects as records in native authoring tools
- Identify appropriate metadata for all formats and sources
- Retrieve information for personal use or to comply with discovery requests
- Dispose of corporate records when their prescribed retention periods elapse
- Set up audit trails and track system usage by department or user
- Deploy a Web-based client that minimizes the burden on IT
- Lower operating costs by using “intelligent barcoding” on physical objects

With Documentum Records Manager, users can search for records and e-mail, view file plans and retention/disposition policies, declare and classify records, and participate in workflow activities—all through an easy-to-use desktop client or Web browser. At the same time, access to records is tightly controlled and actions are thoroughly audited.

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## Tackling the e-mail challenge

With Documentum Records Manager, you can

- Display Microsoft Outlook folders according to individual user accounts in order to simplify the filing process and leverage human judgment to discern business relevance
- Associate file plan classifications with a user's monitored Outlook folders to preserve messages for the required duration
- Enable record properties to be auto-populated with message metadata to facilitate discovery searches without burdening end users
- Access e-mail records from within the Records Manager client for improved discovery searches that span across all record and document types
- Optionally prompt users to declare outgoing messages as records so as to balance storage implications with risk profiles appropriate to your organization

## Automated record classification

Deriving optimal value from managed content, including records and archived e-mail, requires that the content be tagged and categorized. This enables accurate organization, content association, improved search capabilities, and powerful exception handling processes. But manual systems for tagging and categorizing records have their limits, especially due to the sheer volume of records that must be handled.

That's why Documentum Records Manager features Content Intelligence Services for automatic metadata extraction and analysis of records. EMC Documentum Content Intelligence Services (CIS) uses a powerful classification algorithm that analyzes records and e-mail against a records management file plan. CIS automates and controls the rich tagging and categorization of all records types.

Organizations that also employ EMC Documentum content management can associate file plan classifications to folders in the Documentum repository: when a document is declared as a record, its classification is automatically inherited from the folder in which it's located. Many of the document metadata fields auto-populate the record profile, ensuring that maximum data is available with minimum effort.

## Organizing physical records with Documentum

At many organizations, physical records such as paper, microfilm, and magnetic tape have accumulated over the years and pose a significant challenge and expense to retain or destroy. Documentum Records Manager offers deep and integrated functionality for physical records, helping companies reduce storage costs as well as filing and retrieval times. Records Manager provides advanced functionality such as support of "intelligent barcoding" which eliminates keystrokes and reduces manual entries, simplifies bulk scanning and upload, and enables barcode printing from an easy-to-use wizard.

## Benefits of an integrated solution

Feature	Benefit
Uniform records management policies and procedures applied to physical, electronic, and e-mail records	<b>Control:</b> All records under corporate control to support regulatory compliance (for example, SEC 17a, HIPAA, Data Protection Act, Sarbanes-Oxley)
Integrated with non-rewritable, non-erasable storage media	<b>Compliance:</b> Supports compliance initiatives in regulated industries
From the leading vendor for enterprise content management, collaboration, records management, and storage	<b>Confidence:</b> Proven end-to-end solutions, deep integration opportunities, solid vendor viability

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## Integration with the EMC Documentum content management platform

Documentum Records Manager combines the records management discipline with the power of enterprise content management enabling organizations to achieve greater efficiencies and utilization.

### *Benefits of content management in a records environment*

Leveraging Documentum content management strengthens Records Manager capabilities along the entire lifecycle of a record. Records Manager is integrated with the Documentum platform, providing world-class scalability, reliability, and availability. Having a repository that can grow with your organization and accommodate multiple locations around the world will meet legal and IT requirements. And the ability to use records management for Web content, rich media, and fixed content is critical to forward-looking organizations.

Documentum Records Manager allows you to establish a uniform set of policies for the creation, retention, and disposition of all electronic, physical, and e-mail records

### *Benefits of records management in addition to content management*

Records Manager complements the Documentum content management platform by asserting full control over records to guarantee compliance. Here are just a few examples of how Records Manager facilitates a rapid and reliable deployment:

**Classification:** Records cannot “slip through the cracks.” Mandatory classifications (manual or automatic) specify authorities and disposition instructions.

**Scope:** Any identifiable object can be handled as a record.

**Disposition:** Tools to identify records that are ready for disposition also track what (if any) approvals are needed before records can be destroyed.

**Expunge:** Records Manager goes beyond “delete” and re-writes over the prior disk or tape location multiple times to ensure complete destruction of information.

**Authentication:** Records Manager is hard-coded to block the manipulation or destruction of electronic files during the retention period.

## Take the next step

Find out how your business can benefit from EMC Documentum Records Manager. Use records management as an opportunity to make a distinct difference in your organization’s efficiency while reducing exposure and risk. To learn more, visit [www.emc.com/documentum](http://www.emc.com/documentum) or call **800.607.9546** (outside the U.S.: +1.925.600.5802).



**EMC Corporation**  
6801 Koll Center Parkway  
Pleasanton, CA 94566-7047  
1-925-600-6800  
In North America 1-800-607-9546

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