



product data sheet

Documentum Enterprise Records Manager Edition

Highlights

- Simplifies compliance with information retention requirements imposed by regulation, corporate policy, or industry standards
- Reduces storage and labor costs for e-mail and message administration
- Establishes a uniform set of policies and rules for the creation, retention, disposition, and retrieval of all e-mail, physical, and electronic records
- Helps leverage the intellectual value of e-mail and other records enterprise wide
- Enables secure, fast, and convenient access and retrieval of all records
- Certified against DoD5015.2-STD and UK-PRO, and meets other commonly accepted electronic record-keeping standards such as ISO15489
- Helps assure business continuity by preventing loss of vital records

Enabling Accountability Through Enterprise Records Management

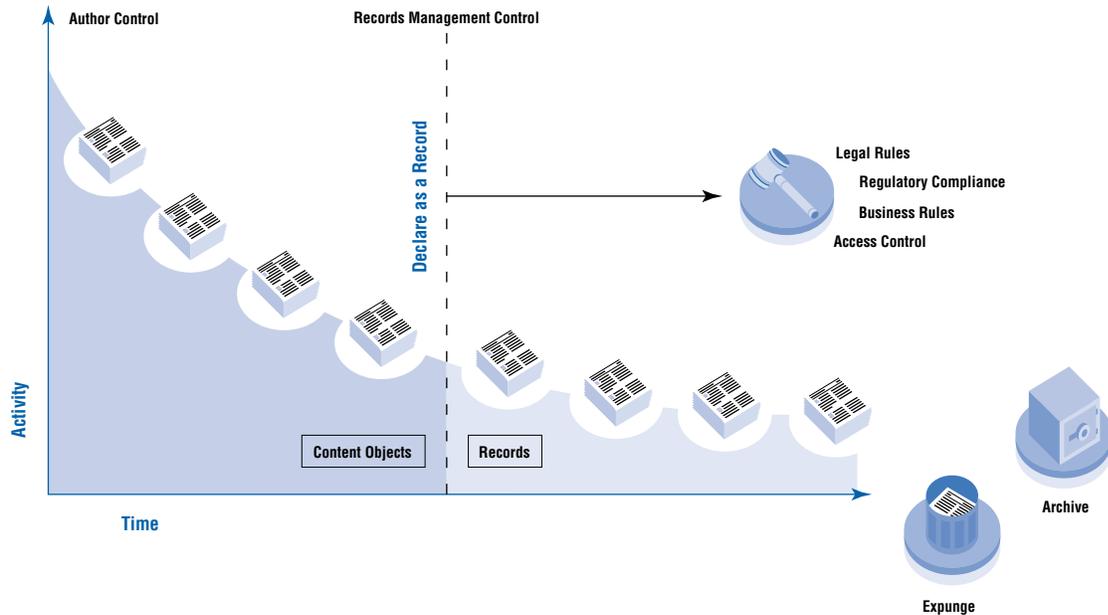
Today organizations are required to meet a growing body of regulations governing all kinds of information. Paper and electronic documents, and other content such as e-mail, must be classified, stored, and retrieved to enable accountability. But your records risk being lost, misfiled, or retained longer than required by law, driving up the cost of storage and access. Are you able to integrate paper-based systems with tools for managing electronic and e-mail records so you can immediately locate any content, in any format, at any time? Will you be able to optimize storage costs, particularly for the exploding volume of e-mail and electronic messages? And an even bigger question — are you prepared to overcome the risks of non-compliance and manage the operational costs of records retention in the new era of accountability?

Moving Beyond Storage

A company or governmental agency's well being depends in part on its ability to produce records on-demand, recover deleted content, and prove that missing records and content were destroyed appropriately. Legislation requires the retention of business documents for specified periods of time. Privacy laws oblige companies to provide accurate information — but only to those authorized to see it. And the cost of not complying with regulations can be severe: fines, litigation expenses, and tarnished image.

Yet with the growth of e-mail, the Internet and intranets, instant messaging, and other technologies, your company's record-keeping capabilities are being pushed to the limit. You cannot simply stockpile printed records and electronic assets, as that solution often leads to steep administration and storage costs and no assurance that you'll be able to produce information quickly when required. If you fail to apply uniform record-keeping rules, you'll end up with "silos" of disconnected information with no way for employees to leverage the vast amounts of information necessary to do their jobs.

What's needed is an effective records management strategy that helps organizations create, safeguard, and access necessary records, relate them to relevant content, and then cost-effectively archive or destroy records after their administrative, regulatory, or legal justifications have elapsed. Industry analysts identify the ability to apply a common, uniform set of corporate policies across all records types as a strategic customer advantage.



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

Understanding Records Management

For a good portion of their existence, paper and electronic records are one type of content that falls into the “realm” of content authoring and management tools. For example, various versions of a Microsoft Word document can be created and managed using the scalable and secure Documentum repository and library services. Various metadata about the content of these document versions can be created or automatically extracted, multiple individuals can collaborate to change and revise the content, and workflow and lifecycle management processes can be applied to move the content from, for example, the “Work in Progress” state to “Approved.”

At some point, which can be defined by a user or by an automated process, the content can be regarded as being “laminated.” The content then becomes unchangeable and must be treated as a permanent asset that is retained for a variety of regulatory and good business practice reasons. The object becomes a “record” and is subject to legal rules for regulatory compliance, retention, access control, and eventual disposition — permanently archived, or destroyed.

Putting the “Enterprise” in Records Management

Documentum Enterprise Records Management Edition supports all record types — electronic, physical, and e-mail — and enables organizations to:

- **Establish** policies and procedures for identifying and protecting business-critical records
- **Capture** records from a variety of physical, electronic, e-mail, and scanned image sources
- **Retrieve and disseminate** recorded information
- **Store** inactive records that need to be retained for legal, fiscal, regulatory, or administrative reasons
- **Implement** procedures for the timely, secure destruction of corporate records when their prescribed retention periods elapse

Records Organization, Retention, and Disposition

If an enterprise solution is to be viable, it must enable an organization to implement procedures for storage, retrieval, dissemination, protection, preservation, and destruction of recorded information associated with all business operations. With Documentum, customers can:

- Set up and edit the “file plan” — an organized hierarchy of files, folders, and documents
- Identify appropriate metadata
- Set up accounts, groups, and access control
- Define policies for how long to keep records, and what to do with them at the end of the period
- Set up audit trails, run space utilization reports, and other management information

Integrate Enterprise Records Sources

Organizations must be able to capture and classify records from a variety of different sources throughout the enterprise, bringing them under the control of records management policies and procedures. Documentum offers optional Records Activators that integrate records management capabilities with external content sources. Records Activators facilitate the classification and declaration of content stored on external systems with Documentum Enterprise Records Management Edition. A third-party content management system can provide a framework for content creation while Documentum Enterprise Records Management Edition adds the accountability of formal records management procedures and handles the classification, declaration, retention, and disposition of records at the end of their retention life cycle. Records Activators are available from Documentum for Lotus Notes, Hummingbird, Microsoft, and other repositories and document management systems.

Scalable Records Services for E-Mail

Organizations are responsible for e-mail that passes through their corporate messaging systems. They must ensure that regulatory standards for message retention are met, or they may face potential litigation. To help make compliance easier, Documentum Enterprise Records Management Edition:

- **Archives** inbound, outbound, and internal e-mail messages in the scalable and secure Documentum repository
- **Applies** uniform enterprise-wide records management policies (e.g., organization, retention, disposition) to archived messages

- **Stores** attachments as separate, linked records
- **Resolves** duplicates and stores only one instance of e-mail copies
- **Automatically extracts** standard message properties, such as To, From, CC, Subject, Date, and Time Sent/Received
- **Applies** workflow or business rules for content sampling, notification, and exception handling
- **Links** messages with other content types to leverage messages in a searchable information repository, improving customer service, and employee productivity

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 are limited by the sheer volume of records, especially e-mail, that must be handled.

Documentum Enterprise Records Management Edition features Content Intelligence Services (CIS) for automatic metadata extraction and analysis of records. CIS uses a conceptual classification algorithm that analyzes records and e-mail against a records management file plan. With CIS, actionable metadata from new or existing records is automatically identified. CIS automates and controls the rich tagging and categorization of all records types, speeding information retrieval, supporting personalized content delivery, enabling business processes for notification and exception handling.

Organize Physical Records

At many organizations, physical records such as paper, microfilm, and magnetic tape have accumulated over the years and pose a significant challenge to retain and archive or destroy. The physical storage space required for records and the personnel costs required to file and retrieve them can be onerous. Documentum Enterprise Records Management Edition applies uniform enterprise-wide

records management policies to physical records, helping customers reduce storage costs for physical records and reducing time required for filing and retrieval. It supports bar code assignment, bar code printing and record retrieval, capabilities for space management, and enables migration and accession to offline/dormant storage.

Store Documents for Easy Retrieval

Documentum Enterprise Records Management Edition features a highly scalable repository for long-term storage of records. For e-mail, this reduces end-user mailbox space requirements without the risk of losing important information. Customers can choose the physical storage media — Windows NTFS or UNIX file system, optical, tape, etc. — that best meets their requirements for retention and disposition. For speed of access, preservation, and regulatory compliance, Documentum Enterprise Records Management Edition features integration with non-erasable online storage systems.

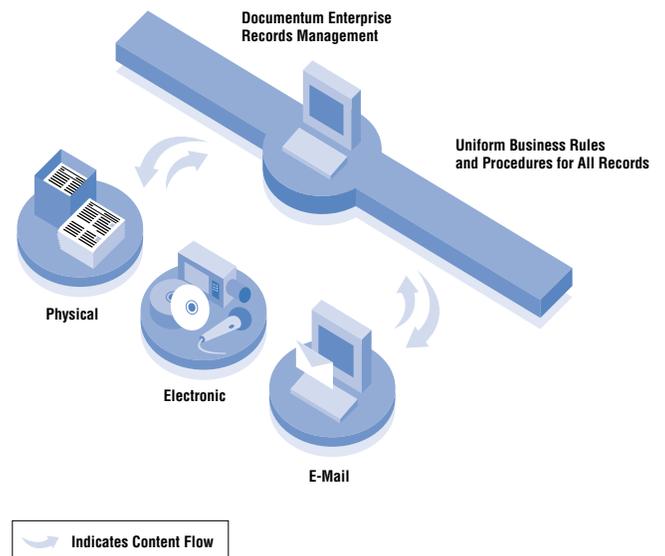
Flexible End-user Access

To achieve the goal of sound records management in an organization, end-users need to participate in the process. Specifically, they need to classify content as records according to the appropriate file plan and file such content in the repository. Of course, end-users must be able to find and retrieve required records with ease.

Depending on authorization to do so, Documentum Enterprise Records Management Edition end-users can utilize Web and specialized client software to search for records and messages, view file plans and retention/disposition policies, declare and classify records manually, and participate in workflow activities. E-mail users can view archived messages stored in the archives without the requirement to install additional software.

Integration with Documentum Enterprise Content Management

Documentum Enterprise Records Management Edition is a natural complement to Documentum Enterprise Content Management. The integration of uniform policies for retention and disposition of records through Documentum Enterprise Records Management Edition with Documentum Enterprise Content Management provides a comprehensive, scalable, end-to-end solution for the creation, version control, security, and lifecycle management of content of all types, including Web, documents, records, e-mail, digital assets, fixed content, and more.



With Documentum organizations can establish a uniform set of policies and rules for the creation, retention, disposition, and retrieval of all e-mail, physical, and electronic records.

Summary: Enabling Accountability and Responsibility

Documentum Enterprise Records Management Edition combines the records management discipline with the power of Enterprise Content Management enabling organizations to achieve greater efficiencies from storage and e-mail systems, address end-user needs for access to records and messages, and meet business or regulatory requirements for record retention and disposition. Customers can safeguard intellectual property without incurring steep administration and storage costs, and are equipped to defend their internal policies and actions, potentially saving enormous amounts of time, effort, and money. For example, by demonstrating their compliance with new consumer confidentiality and corporate governance regulations, and their ability to produce records as requested during a legal or government inquiry, companies might avoid legal, monetary, and procedural penalties. By verifying that they followed accepted guidelines and the law when deleting records or content, they may avoid even the appearance of wrongdoing.

DOCUMENTUM ENTERPRISE RECORDS MANAGEMENT EDITION	FEATURES	BENEFITS
✓	Applies uniform records management policies and procedures to physical, electronic, e-mail records	Control: all records under corporate control to support regulatory compliance (e.g., SEC 17a, HIPAA, Data Protection Act, Sarbanes-Oxley)
✓	Integrates e-mail records management with scalable and secure Documentum Enterprise Content Management	Compliance, risk avoidance: easily produce messages on demand Cost Control: reduce inbox size and e-mail server costs, avoids “silos,” encourages knowledge sharing
✓	Content Intelligence Services analyzes records and extracts actionable metadata	Convenience: Enables accurate organization, content association, improved searchability, and exception handling
✓	Integrated with document management systems as records sources	Control: brings records under corporate control, eliminates “silos”
✓	Certified against DoD 5015.2 and UK-PRO standards, ISO conformance	Compliance: meets requirements for recordkeeping
✓	Integrated with non-rewritable, non-erasable storage media	Compliance: supports compliance initiatives in regulated industries
✓	From the leading ECM, collaboration, and records management vendor	Confidence: proven end-to-end solutions, vendor viability

Documentum Enterprise Records Management Edition at a glance.

About Documentum

Documentum provides enterprise content management (ECM) solutions that enable organizations to unite teams, content, and associated business processes. Documentum's integrated set of content, compliance, and collaboration solutions support the way people work, from initial discussion and planning through design, production, marketing, sales, service, and corporate administration. With a single platform, Documentum enables people to collaboratively create, manage, deliver, and archive the content that drives business operations, from documents and discussions to e-mail, Web pages, records, and rich

media. The Documentum platform makes it possible for companies to distribute all of this content in multiple languages, across internal and external systems, applications, and user communities. As a result, Documentum customers, which include thousands of the world's most successful organizations, harness corporate knowledge, accelerate time to market, increase customer satisfaction, enhance supply chain efficiencies, and reduce operating costs, improving their overall competitive advantage. For more information about Documentum, visit www.documentum.com or call 800.607.9546 (outside the U.S.: +1.925.600.6754).



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