

Xerox DocuShare Records Manager

Driving the Need for Electronic Records Management

For years, private, non-profit, and government sector organizations have typically managed paper records in a physically controlled, centralized fashion such as an offsite warehouse. Several drivers are causing records management processes to change to an Enterprise Content Management model:

- Increasing requirements for government compliance in response to financial scandals
- Enormous volumes of electronic content that may never reside in hard-copy format
- Business continuity risk if hard-copy documents are lost in a disaster
- Immediate access to critical documents in the case of legal litigation
- Limited resources within organizations to effectively manage all content
- Management and control of intellectual assets represented in documents that must be accessible
- Freedom of Information Act requirements that mandate documents be publicly accessible via the Web
- Increased pressure to minimize paper in organizations and government offices

Electronic Records Management systems are designed to ensure the efficiency of overall business processes and support larger corporate objectives related to regulatory compliance, legal discovery processes, and disaster recovery.

Effectively Manage and Protect Essential Business Documents

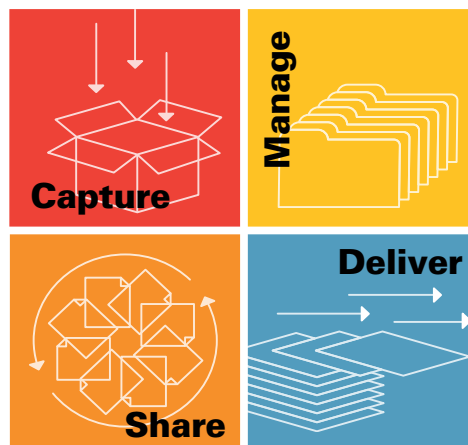
DocuShare Records Manager is a comprehensive system for applying formal records management policies and practices to electronic documents stored within the DocuShare Enterprise Content Management (ECM) environment. The DocuShare Records Manager add-on module works in concert with DocuShare and leverages DocuShare's ECM infrastructure for document management, image capture, search, workflow, storage, and Web publishing, delivering a fully-integrated document lifecycle environment from creation to final record disposition.

DocuShare Records Manager provides easy integration of collaborative and workflow processes with records management functions by enabling end users to classify and create records at any point in a document-intensive process. Project collaborations can easily be declared as records, and existing desktop applications can be seamlessly integrated with the records management system through DocuShare's powerful client interfaces.

And, with Records Manager, content stored in DocuShare can be easily classified or declared a record without requiring that it be moved to a separate location. This helps reduce replication and mishandling of information, and maintains ongoing use, collaboration, and access by all employees, while helping IT manage their content storage requirements in a unified, scalable fashion. DocuShare Records Manager also helps facilitate productivity and control by giving key decision makers access to the right information when needed.

DocuShare Records Manager can be quickly and cost-effectively deployed to support department workgroups as well as small office installations. And with DocuShare's signature ease of use and client-free deployment, global enterprises can roll out the capabilities to thousands of desktops to address their advanced records management

requirements. DocuShare Records Manager uniquely extends DocuShare's trademark ease of acquisition, deployment, administration, and use into the space of managing records.



DocuShare Records Manager Key Functionality includes:

File Plan Designer—Creates the building blocks for declaration and classification of records based on a file plan defined by corporate policies and taxonomies.

Lifecycle Designer—Defines the rules attached to the building blocks in a file plan. Supports different lifecycles for different classes of records.

Time/Event Disposition (phase transitions)—Supports time, event, and event/time disposition modes with cutoff features to account for the end of a fiscal year or business quarter.

Vital Records—Duly designate vital records for special treatment, to provide a higher level of oversight and control.

WYSIWYG Report Designer—Complete reporting suite allows administrators to query and report on the status of a record at any given time.

Advanced Querying—Offers both simple and advanced querying and reporting using meta data associated with records.

Legal Hold—Enables application of a Legal Hold to designated records. Records under legal hold are protected from destruction until the hold is lifted.

Audits—Provides extensive activity logging and audit trails, essential to provide legal support of retention and destruction.

Extend the Power

- DocuShare Enterprise Workflow module can be used to design and drive classification and publishing rules prior to declaring a document as a record.

- DocuShare Archive Server module can be used to store records in a dedicated environment, while still providing end-user access to the information. Workflow rules can route content to Archive Server as part of the declaration process.

- DocuShare E-Mail Agent and/or DocuShare Outlook Client modules can provide a mid-weight e-mail archive and compliance solution for managing discussions, customer collaborations, etc.

- When combined with Xerox Free Flow Production software, DocuShare enables record retention of critical content such as invoices or other one-to-one customer communications concurrently while printing.

Ease of Administration

DocuShare Records Manager provides a comprehensive suite of tools, accessed through a dedicated administrator interface, that enables skilled records administrators to quickly develop, deploy, and administer a fully-compliant records solution.* DocuShare Records Manager is fully Web based, allowing authorized administrators to remotely update the system, run reports, and disposition content.

DocuShare Records Manager delivers immediate and long-term business benefits:

Reduced litigation risk via structured document destruction.

DocuShare Records Manager provides a highly structured approach to record retention and destruction. When Records Manager is properly implemented within a context of clear and consistent corporate policies, document destruction will be better understood, and businesses have a means of consistently applying applicable laws, regulations, and policies to their destruction decisions.

Reduced discovery costs during litigation via improved evidence discovery.

With a well-defined process for record retention and destruction, backed by supporting audit trails, organizations can use DocuShare's advanced full-text and meta data search to reduce the total time of electronic evidence discovery (e-discovery) during litigation.

Demonstrated compliance with regulations.

Good record keeping means that companies can more easily demonstrate compliance with regulations that affect their business. DocuShare has been submitted for DOD 5015 certification, meaning you can deploy it with confidence in your organization.*

Improved decision-making.

DocuShare Records Manager helps ensure all parts of an organization are making important business decisions based on timely, relevant information, due to the structured destruction of dated or irrelevant information.

Reduced operational costs.

DocuShare Records Manager can help reduce physical storage costs, mandated e-discovery costs, and the costs associated with finding, identifying, and retrieving mission-critical business records.

***While DocuShare and DocuShare Records Manager can provide a solution that fits within a compliance framework, organizations first need to define policies, documentation, and infrastructure to support government compliance requirements. The Xerox DocuShare business team can help you develop and deliver a compliant solution to meet your specific regulatory needs. For more information call 1-800-735-7749 or visit <http://docushare.xerox.com>**