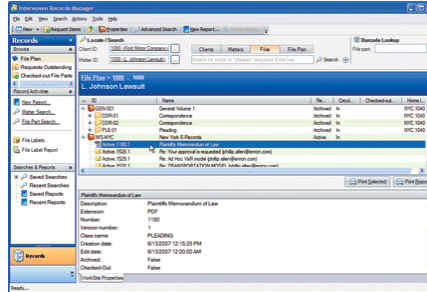


iManage Records Manager

Overview

iManage Records Manager enables professional services firms to organize, manage, and govern records of all types—including physical files, electronic documents, and e-mails—within a unified, scalable system tailored to their own specific requirements and processes.

Designed to help firms deal effectively with increasing regulatory and organizational records management pressures as well as a larger, more complex information environment, iManage Records Manager provides a comprehensive governance solution for capturing, classifying, tracking, scheduling, and managing records media of all types. When integrated with iManage WorkSite, Autonomy iManage's market-leading document and e-mail management system, the solution addresses the entire governance lifecycle with a platform customized to the firm's own guidelines without disrupting current IT or end user processes. As a result, firms can minimize risk while improving productivity.



iManage Records Manager provides extensive search capabilities to locate records easily.

The Records Management Challenge

With e-records reaching the millions or tens of millions in some organizations, it is no longer feasible to rely on individuals to manually classify each record. To effectively streamline and automate the process of capturing, classifying, and declaring records according to a defined policy, firms need a solution that addresses legal and end-user requirements and supports current business processes.

Designed from the ground up according to these principles, iManage Records Manager provides a single policy management and application engine to control records consistently and effectively across offices, media types, and systems in order to reduce the cost of managing records and the risk of non-compliance.

Comprehensive, Automated Governance for All Records Media

iManage Records Manager seamlessly manages all records, including physical, electronic, and e-mail, within an electronic matter or engagement file. Retention policies can be applied automatically at any level, from a specific document to an entire matter or engagement hierarchy. Users simply file documents and e-mails as they ordinarily would—ensuring consistent policy application with no need for manual classification. Templates automate the setup of entire project folders with corresponding records policies; new folders, subfolders, and documents automatically inherit the policy of the level above. Critical records designations can also occur at any level to allow a complete file or single folder to be declared with a single click.

Track Physical Records from Printer to Shredder

iManage Records Manager provides complete functionality for tracking physical records media, including indexing, circulation, and retention processing. Label-printing and barcode scanning functions make file room managers and end users alike more productive.

Establish, Implement, and Monitor Governance

Firms can put their records policy into practice with 5015.2-compliant retention scheduling, holds, review, and screening functions. Retention schedules can be applied based on record categories, record types, or templates selected by the user, or driven by business rules.

File and Schedule Documents and E-mail with WorkSite Integration

iManage Records Manager integrates with WorkSite, the leading document management and collaboration platform for the professional services industry, to provide complete management of the matter/engagement

Highlights

iManage Records Manager incorporates three essential truths of modern records management:

- Records cannot be effectively or securely managed in individual “silos” by separate systems for each record type—email, physical, and electronic.
- The most effective way to apply records policies is via a single control procedure that can be implemented centrally and easily applied by end-users.
- Records processes differ at each organization and the records system must be adaptable to the organization's needs in terms of captured metadata, data entry processes, and customized reports.

System requirements

Client Platforms:

- Microsoft Windows® XP
- Microsoft Windows® Vista

Server Platforms:

- Microsoft Windows® Server 2003
- Microsoft SQL Server 2000
- Microsoft SQL Server 2005



lifecycle. Electronic content, including entire electronic files, is automatically classified and scheduled by iManage Records Manager. WorkSite users can “declare” documents as records on their own, or WorkSite can automatically file content such as e-mail within the file plan according to the organization’s policy.

iManage Records Manager continues iManage’s commitment to leadership in helping professional services organizations address their most pressing content management needs. To find out more about iManage Records Manager, visit www.imanage.com.

Key Features	
Robust, seamless management of all record types	Records of all media types are managed side-by-side, including physical, electronic documents, and e-mail.
Flexibility and customization	Administrators can create any number of metadata attributes at all file levels, allowing more complex policies and processes to be represented directly within the records system. An Application Designer provides a complete suite of customizable data entry search forms, label formats, captions, and graphics, and allows additional reports to be created as well. End users can access key reports such as a file plan summary report or a pleadings index, and can sort reports at run-time with .NET-based scripting.
End-user dashboards	Dashboards enhance productivity and usability by giving users a focused view of the operations that are important to their job.
Robust physical records management and tracking	Firms can manage physical files at the warehouse, shelf, box, folder, subfolder, or document level. A Circulation Dashboard helps file room managers stay productive during peak workloads by consolidating repetitive functions such as creating records, labeling, and managing delivery requests for physical records.
Powerful search and reporting tools	A comprehensive set of search capabilities enhance productivity. The search bar provides both full text and fielded searches. Query-by-example and Boolean searches give more advanced searching. All reporting, including custom reports, is driven by the same search capabilities.
Consistent application of retention policies	Firms can associate policies automatically based on where items are filed, practice group, or record type. Policies can also be overridden as necessary by the records staff. Holds are applied at any level, suspending final destruction of records.
Centrally managed retention policies	A central interface enables administrators to set records governance policies including trigger events, retention periods, and disposition rules, as well as to monitor and enforce compliance. Enhanced retention management functions include event processing, review, cutoff, and records closing.
Policy-based server managed ethical walls	iManage Records Manager provides server-based ethical walls implemented on a policy-based system integrated with the security policies of the organization.
Centralized, secure three-tier architecture	A highly-scalable, three-tier architecture meets the functional needs of small and large firms, as well as globally distributed organizations. The solution offers full data integrity, security, high-performance searching and transaction process, as well as failover and load-balancing.
Software Development Kit	Extend product features and functions or integrate with existing solutions using the fully-documented Software Development Kit.
Barcode Scanning	Complete barcode scanning capabilities make it possible to perform most transactions, including disposition processing on files and boxes, with wedge or portable, handheld scanners. Administrators can quickly check file rooms, perform “desk audits” to confirm which files are with users, and perform tracking functions from any location such as checking-out, checking-in, transferring, boxing, relocating, and destroying folders, subfolders, and boxes.

About Autonomy iManage

Autonomy iManage is the leader in information management applications for the legal and professional services market. Building on Autonomy’s advanced Meaning Based Computing platform, Autonomy iManage offers the most comprehensive suites of information management applications all on a common platform. Autonomy iManage has over a decade of experience working with law and accounting firms to understand how these professionals interact with information and their need to find, manage and process large volumes of content quickly and intuitively. Organizations from all over the world, including 75 of the top 100 global law firms, are standardizing on Autonomy iManage which uniquely spans the complete EDRM on a single technology platform, including document and email management, information governance, archiving and records management, knowledge management, policy management and eDisclosure, legal hold and review. Autonomy iManage can now link over 1,400 law firms with the data inside over 20,000 corporate clients using powerful, familiar tools, and is the only vendor to offer the ability to access and analyze corporate information in-place for a case, eliminating point solutions and the risky and costly hand-offs of data used for investigations and litigation.

Customers include corporations and law firms such as Allen & Overy, BAE Systems, Bloomberg, Citigroup, Deutsche Bank, DLA Piper, Grupo Santander, HSBC, LexisNexis, Linklaters, Lloyds TSB, Merrill Lynch, Slaughter and May, UK Law Society, and White & Case. More than 400 companies OEM Autonomy technology, including Symantec, Citrix, HP, Novell, Oracle, Sybase and TIBCO. The company has offices worldwide. Please visit www.autonomy.com to find out more. Autonomy and the Autonomy logo are registered trademarks or trademarks of Autonomy Corporation plc. All other trademarks are the property of their respective owners.

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