iManage Records Manager

GOVERNANCE FOR PHYSICAL AND ELECTRONIC RECORDS

Key Benefits

- **Seamless integration with iManage Work:** Automatically declare iManage Work content as records; benefit from a single user interface; dispose electronic content in line with physical records

- **Management and control over all records from a single policy:** Eliminate the need to define policies separately in your document and records management systems

- **Increase productivity and insights:** Persona-based dashboards provide customized views of key metrics for specific roles

- **Intuitive Disposition Processing:** Easily automate and manage the end-to-end processing of content that is eligible for disposition

- **Enhance access controls:** Adopt ethical wall and need-to-know policies with iManage Security Policy Manager integration

Security + Risk Management + Information Governance

- **iManage Business Intake Manager:** Automated management of business intake procedures

- **iManage Conflicts Manager:** Single view of ethical and business conflicts

- **iManage Security Policy Manager:** Need-to-know security policies and information barriers at scale

- **iManage Threat Manager:** Data protection from internal and external threats

- **iManage Records Manager:** Electronic and physical records management

As communications and email volumes grow, and the forms of information professionals work with multiply (text messages, voicemail, social media), organizations face significant challenges for effectively managing records across the enterprise. How professional services firms manage and secure physical and electronic assets is critical for compliance and business success.

iManage Records Manager is the industry-leading records management application used by professionals to manage both electronic and physical records on any device and from any location. A modern web-based interface delivers governance and legal hold capabilities for a variety of physical and electronic assets including physical files, electronic documents, and emails, ensuring information is retained based on organization retention polices and then disposed when it reaches end of life.
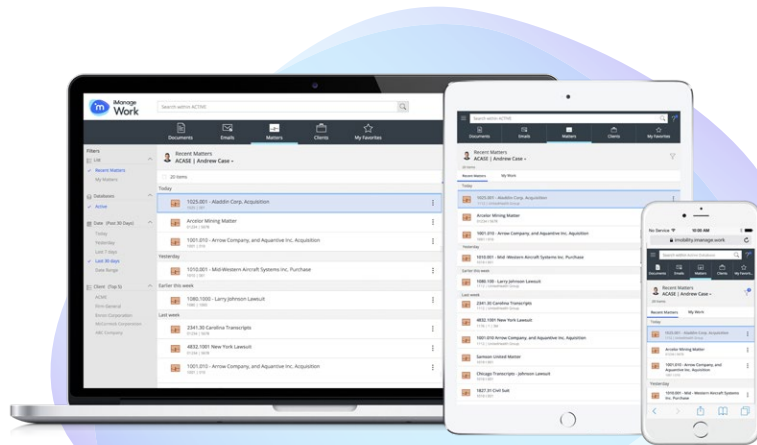
Single user experience across devices improves productivity and increases adoption.

Seamless integration with iManage Work delivers a fully integrated and consistent user experience and a full-featured API enables integration with other systems to further extend iManage Records Manager capabilities. The central policy engine governs physical records — in offices, filerooms, and offsite warehouse locations — and electronic records in iManage Work or other systems such as Windows file shares. Improve organization efficiency, ensure compliance, and manage risk, by harnessing the power of iManage Records Manager.

Centrally apply retention policies to physical and electronic content

iManage Records Manager enables administrators to set, monitor, and enforce records governance policies centrally (including trigger events, retention periods, and disposition rules). These policies are applied consistently to electronic content in iManage Work and other systems and physical content offsite warehouse locations and inside the firm. Policy disposition instructions are linked to individual records and a single status view is provided of electronic and physical activity and audit history.

Automatic declaration of records and assignment of retention policies improve user adoption

iManage Records Manager streamlines capture, classification, and security by allowing users to continue to file documents as normal, with appropriate retention policies applied automatically. There is no need to declare a document as a record for it to be managed.

Visual dashboards provide clear visibility into system status

Role-specific dashboards, governed by security, enable records staff to review and understand key metrics for the system and where bottlenecks are occurring. Dashboard metrics are fully customizable, allowing records managers to select and position metrics that are focused on their own specific area of responsibility. Metric charts support click through, ensuring that the detail behind can be inspected and action taken where needed.

Market-leading physical records management capabilities reduce TCO

Records Manager's market-leading physical records management capabilities reduce organizational costs and streamline business processes. Features include:

- Fully configurable hierarchical location types including cities,

Single user interface for electronic and physical content

buildings, offices, file rooms, zones, racks, shelves, and other specific locations

- Flexible, customizable label templates to simplify label printing
- Tracking of circulating items using barcodes
- Supports Wireless Android scanners and the re-use of existing barcodes after migration
- Communication with offsite storage vendors directly from iManage Records Manager
- Built-in integration with electronic records management

Disposition processes mitigate organisational risk

iManage Records Manager provides an easy way to streamline and track the end-to-end processes by which content eligible for disposition is managed. Intuitive options allow

firms to choose the appropriate single or multi-approver process that best meets their needs.

Summary emails for each review task are sent to designated approvers, and a webpage link displays all matters, physical files, iManage Work, and file share content eligible for disposition. Reviewers can view items in conjunction with their key metadata values and can delete or not approve them at the matter, workspace, folder or document level.

Deploy in the iManage Cloud or on-premises

iManage Records Manager is available in the iManage Cloud, managing electronic content stored on-premises and/or in the cloud.

About iManage™

iManage transforms how professionals get work done by combining artificial intelligence, security, and risk mitigation with market-leading document and email management. iManage automates routine cognitive tasks, provides powerful insights and streamlines how professionals work, while maintaining the highest level of security and governance over critical client and corporate data. Over one million professionals at over 3,000 organizations in over 65 countries – including more than 2,500 law firms and 1000 corporate legal departments – rely on iManage to deliver great client work – securely.

iManage
Making knowledge work

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