



# Atlas Enterprise Retention Management

## ELIMINATE THE “BIG 4” INFORMATION MANAGEMENT RISKS

Atlas Enterprise Retention Management is a single, cohesive retention management system with natively integrated workflows and analytics for information governance stakeholders. With Atlas Enterprise Retention Management, your organization eliminates the “Big 4” Information Management Risks:

1. Defined retention periods for physical records only — no schedule for electronic records
2. Departments with no knowledge of actual procedures, information, location, use or value
3. Inability to pass internal audit
4. Inability to respond to regulator or court requests

## ACHIEVE DEFENSIBLE DISPOSAL

When you use Atlas Enterprise Retention Management in conjunction with Atlas Information Governance for IT and Atlas Enterprise Discovery Management, your organization also eliminates these risks:

1. IT “saving everything,” thereby increasing discoverable mass
2. Inability to defend disposal practices due to inconsistent processes and retention periods
3. IT disposing of data of value to the business or with legal obligation

*Atlas Enterprise Retention Management enables companies to maintain centralized retention control with localized responsibility. Atlas manages a corporate taxonomy and library of retention, privacy and discovery laws with appropriate roles and change management processes for field-level authorization.*

*Atlas Enterprise Retention Management helps you quickly publish accurate, dynamic schedules that are value-based and in line with the needs of business unit and country operations. Atlas manages change requests and controls to enable your global records coordinators to easily and consistently maintain schedules.*

## Atlas Enterprise Retention Management Capabilities

### Leverages Existing Schedules and Staff

- » Import your existing retention schedule and taxonomy, or use our starter kit to launch your program
- » Incrementally layer in and reconcile country and business unit schedules
- » Tap departmental delegates and provide them with convenient, web-based tools to manage their retention schedule and activities

### Establishes Lifecycles for All Information

- » Define retention periods for records, drafts, and copies
- » Establish retention periods for record classes and non-record categories
- » Incorporate both electronic and physical information in one program
- » Centrally and consistently manage schedules for all information

### Publishes Accurate, Dynamic Schedules

- » Leverage Atlas Information Governance for IT to quickly conduct global information inventories by business, function, and country and link proper retention, data management and discovery procedures to each information repository
- » Author retention schedules that reflect business value and legal requirements
- » Publish corporate and country master schedules
- » Publish group and departmental schedules that link to the master taxonomy or pre-approved country specific exceptions where there is a valid deviation from the master
- » Update procedures and practices immediately when laws, systems, or business objectives change

### Hosts a Comprehensive, Shared Law Library

- » Catalog laws for all operating jurisdictions
- » Incorporate retention, discovery and privacy laws for more comprehensive instructions
- » Author and share governance procedures and internal protocols, identifying their specific requirements
- » Link laws and protocols to retention schedules, and identify governing laws down to requirement subsections
- » Utilize a full jurisdictional model with support for governing regions such as EU

## ATLAS ENTERPRISE RETENTION MANAGEMENT AND RETENTION FOR EMPLOYEES

Quickly launch and sustain a global retention program for electronic and physical information.

Know what information has legal obligation and value — and achieve routine, defensible disposal when Atlas Enterprise Retention Management is combined with the workflows of Atlas Information Governance for IT and Atlas Enterprise Discovery Management.

## ONLY ATLAS IS PROVEN AT THE SCALE, RELIABILITY, AND COMPLEXITY YOU REQUIRE

- » In production in Fortune 5 since 2005
- » Manages over 5 million custodians and 1 million data sources
- » Used in more than 100 countries
- » Successfully upgrading customers' litigation data set for four product generations
- » Single legal holds with over 100,000 custodians
- » Customers with more than 15,000 active matters
- » Used to defend spoliation claims

## Synchronizes Records Coordinators Globally

- » Unify data protection and retention procedures by country, function, system, and business process
- » Manage information by common taxonomy, business value and country laws
- » Establish roles, privileges and authorities for program staff
- » Establish and coordinate a network of global records coordinators: allow country or business unit leads to manage their own records coordinators and schedules in a common system and program
- » Delegate specific responsibilities to local coordinators, including schedule development with proper approval workflows
- » Manage exceptions with field-level authorization workflow
- » View information subject to data privacy and data protection requirements

## Establishes Communications Across Legal, IT and Business Staff

- » Publish bulletins and other communications globally by role, country, and business unit affiliation
- » Systematically alert stakeholders when laws, repositories, staffing or procedures change
- » Publish policies, training, and procedures to people based on role, program participation, country or business affiliation
- » Ensure all new systems have retention procedures and schedules from day one
- » Attach documents to a departmental schedule

## Enables an Auditable Program

- » Prevent spoliation or regulatory challenges with version history and audit controls
- » Audit by business group, country, or information category, and enable internal audit with convenient reports and reminders
- » Demonstrate program effectiveness to regulators and management with controls, authorized procedures, and compliance history

## Manages Asset Inventory

- » Define all classes of data sources and manage as a portfolio; type and clone to populate the catalog
- » Use flexible data source definition to define and manage assets by data type, system type and administration, active status, DR policy, security, and discovery attributes
- » Centrally manage data service providers and vendors and associate one or more assets and organizations with the provider
- » Link assets to one or more organizations
- » Manage predecessor/successor relationships
- » Manage staff assignments to data sources
- » Ability to set up data sources (including email, desktop, file shares, applications) and corresponding collection templates for collection workflow

## Enables Data Governance

- » Filter and find assets by location, data type, vendor, system type, responsibility, organizations served, stewards
- » Track system retirement and transitions
- » Capture the history of a system, including its active lifecycle, business unit relationships, data format, retention and DR practice, and successor systems

## ATLAS SUITE TECHNICAL SPECIFICATIONS

### Browser

- » Microsoft Internet Explorer (v 6, 7 or 8) or Firefox (v 3.5.7).

### Oracle Database Environment

- » Database: Oracle 11g on any Oracle supported OS.
- » One of these application servers: IBM WebSphere 6.1, Oracle WebLogic 11g or JBoss 5.
- » Running on one of the following OS: Windows Server 2000 or 2003, Solaris 9 & 10, Red Hat Enterprise Linux 5.

### Authentication

- » SSO Siteminder, LDAP 3.0 (i.e. Active Directory), NTLM 1.

## Retention for Employees

*Atlas Retention for Employees automates communication of retention requirements and status. With this extension of Atlas Enterprise Retention Management, your organization has a single system of record with workflow for the key stakeholders in Records and Line of Business. Atlas Retention for Employees keeps global employees in line with regulatory obligations.*

### Retention for Employees Capabilities

#### Enables Employee Compliance

- » Conveniently look up applicable department schedules
- » View full classification and master schedule
- » Look up retention policies and procedures

## Related Products in the Atlas Suite

### Atlas Information Governance for IT

Atlas Information Governance for IT completes the data catalog and enables clear communication of retention schedules with IT staff. Atlas Information Governance for IT extends definition and management of data sources across the portfolio. When used together with Atlas Enterprise Retention Management, Records Managers can:

- » Apply retention schedules to all information. Always-accurate retention schedules are an actionable and reliable basis for disposal, with legal hold overrides when appropriate
- » Institute controls for physical record storage and publish retention schedules specific to vendors to ensure disposal
- » Enforce retention schedules routinely and systematically
- » IT can catalog data sources and assets, simplify data inventory management and easily manage the relationships between systems and organizations, assigned IT staff, and applicable privacy, retention and discovery obligations

### Further Automate Retention Efforts with Atlas Compliance Automation

Eliminate manual collections and enable attorneys to collect directly with Atlas Compliance Automation. With Atlas Compliance Automation, preserve in place and collect data directly from email archives, content management applications, and file shares. Atlas Enterprise Discovery Management customers leverage Atlas Compliance Automation services to connect to IBM, Symantec, EMC, file shares, Autonomy and other sources. The SDK allows IT to implement connectors for high volume systems for lower cost compliance.

### Achieve Rigorous Discovery and Defensible Disposal

Enterprise Retention Management is part of the Atlas Information Governance Suite. With both Atlas for Rigorous Discovery and Atlas for Value-Based Retention in place, the world's largest organizations are achieving defensible disposal. IDC estimates data volume increasing at 50% per year and the legal burden is greater than ever. Discovery and data management costs are escalating at a time when enterprises are looking for significant cost reduction. The Atlas Information Governance Suite is the only solution that eliminates unnecessary legal risk, discovery costs and data management expense.



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