DL ®
Document Locator

Document Management Software

Reduce risk and comply with information management requirements

Create and implement custom-tailored records management policies that address compliance, regulatory, and legal obligations for the control, access and disposition of information.

The integrated **Record Policy Manager** in Document Locator allows you to build information policies to manage the entire life-cycle of regulated content.

- Identify, capture, store, and manage the disposition of business records.

- Reduce risk and maintain compliance with regulations like e-Discovery, Sarbanes-Oxley, HIPAA, ISO, FDA, and Basel II.

- Customize actions in accordance with information management policies.

Maintain standards and minimize the risk of financial loss

Regulations and standards for information control are challenging companies of all types and sizes. Document Locator's records management capabilities allow you to meet these challenges by establishing defined policies for the identification, capture, storage, and disposition of records. This reduces the risk of unexpected financial loss resulting from legal actions, eDiscovery, government regulation, industry compliance, audits, and more.

- Ensure business documents are correctly identified as "records" and they are correctly managed throughout their life cycle.

- Profile business records for speedy retrieval. Profile and property metadata identifies, organizes, and catalogs business records so that they can be found quickly.

- Capture an audit trail proving that records were stored, maintained, and disposed of according to defined policies.

Fast information retrieval

In many cases, simply retaining records isn't all that is required. For example, with eDiscovery electronic documents, emails, and files relating to legal requests may need to be identified and made available within very short time periods. To comply with deadlines, records must be accurately identified in advance, and made available quickly. The Record Policy Manager allows you to pre-define information, and when combined with advanced search functions, files can be retrieved quickly.

Benefits

- **Reduce Risk**
  Reduces the potential for financial loss stemming from legal and regulatory events, audits, or other compliance requirements.

- **Compliance**
  Helps ensure continued compliance with government and industry regulations.

- **Information Management**
  Establishes standards for information management and control.

Solutions

- **Regulated Content**
  Create and apply custom-tailored records management policies for regulated content involving HIPAA, ISO, FDA, Basel II, and more.

- **e-Discovery**
  Quickly produce required electronic documents, emails, and files under short deadline.

- **Records Auditing**
  Prove the validity of your records management activities with logging and defined policies.

- **Industry Compliance**
  Correctly identify documents as "records" and manage their security, retention, and disposition.

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Manage the disposition of records

Protect business records from accidental or unauthorized alteration or destruction. The Record Expiration Manager determines the disposition of files, ensuring that records that should be destroyed, reviewed, or archived are handled according to defined disposition policies.

Customize records policies according to your own requirements

The flexibility of the Records Policy Manager allows you to tailor policies and define review, retention, and disposition actions according to your own needs. Policies can be applied at the folder or document level.

- Assign a manager to each record policy.

- Assign record policies to folders and documents from a variety of dialogs in the system, such as when documents are created, imported, or moved.

- Automatically send expired files to the Expiration Manager for review.

- Combine the functionality of the optional Automated Workflow Module with Records Management to take advantage of additional automated expiration actions, such as deleting files directly, moving or copying files to an archive, and more.
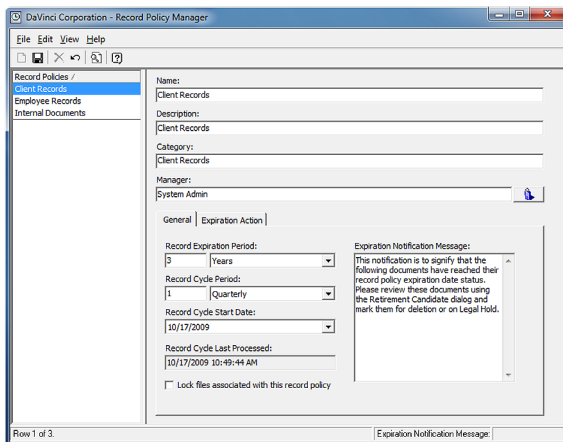
The integrated Record Policy Manager allows you to custom-tailor records polices for the accurate identification, capture, storage and disposition of files.

Include email as critical piece of records management

With an optional Email component, email messages and attachments can be automatically included within records management practices. In circumstances of eDiscovery or other compliance events, Email records can be quickly retrieved.

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