

EMC SOURCEONE DISCOVERY MANAGER

Move from reactive to proactive information management

ESSENTIALS

- Extends Email Management's Discovery Express base capabilities to include full eDiscovery Management
- Provides investigators with an intuitive interface to manage the legal matter lifecycle.
- Eliminates manual tracking of case matters with spreadsheets and other documents
- Consolidates relevant content into a "hold" folder where messages are deduplicated and full-text indexed, and can then be audited to verify chain of custody and to protect against spoliation.
- Reduces the cost of discovery by presenting only the content that is relevant to the matter at hand for review by counsel.
- Enables expedient full-text and custom metadata searches across high volumes of messages and other content.
- Creates global and matter-specific tags for efficient management of the investigative process.

For many organizations, responding to discovery requests is a time-consuming, manual process. Identifying and collecting matter-relevant electronically stored information (ESI) can be costly. IT departments may lack defensible preservation policies for messages and other information. As a result, legal teams cannot conduct early assessments to determine case merit. They incur significant expenses with outside counsel and subject the organization to penalties, sanctions, and adverse rulings.

EMC SourceOne™ Discovery Manager is an integral component of any proactive discovery and good data protection plan. Discovery Manager discovers, manages, and applies secure holds to content in the EMC SourceOne archive. With Discovery Manager, organizations can quickly find, safely hold, efficiently cull, and defensibly produce archived content in response to a legal, investigative or regulatory notice or a corporate policy complaint. Built around a legal matter or case metaphor, Discovery Manager supports secure authorized investigator access, defensible collection results, and chain of custody.

REPEATABLE EDISCOVERY BUSINESS PROCESSES START WITH EFFICIENT ARCHIVING

EMC SourceOne archives email, File System and Microsoft SharePoint data into a centralized location, eliminating the need for repetitive, ad hoc searches of databases, personal archives, and backup tapes, as well as manually managing cases with spreadsheets and other documents. SourceOne Email Management provides a Discovery Express feature, which enables advanced search and export of archived email data. SourceOne Discovery Manager extends those base capabilities by offering a full eDiscovery solution for all content types to help organizations streamline their discovery business processes to reduce response times and lower associated costs for both internal and outsourced legal review. With Discovery Manager, business unit and legal teams can stop chasing paper and instead focus on strategic case direction.

IMPROVE INVESTIGATOR PRODUCTIVITY

Discovery Manager makes it easy for investigators to apply a repeatable, efficient process when faced with discovery requests. A convenient wizard-driven user interface lets organizations work with ease across multiple cases and legal matters, and allows for keyboard execution of functions and support for screen reader technology. Granular role assignments define the actions that individuals may perform and allow business users to manage a matter throughout an investigation. Organizations can identify a specific subset of archived content that may be relevant to a matter or a case. Results are consolidated into a hold folder where content is deduplicated and full-text indexed. This helps organizations reduce costs of discovery because only a subset of the content must be transmitted to legal counsel for review.

MATTER LIFECYCLE MANAGEMENT

Many organizations manage multiple investigations, audits, litigations and discoveries at any given time, some of which may span over many users and several years.

Discovery Manager tracks cases throughout their lifecycle, and extends to both active and closed matters. Information can be applied across multiple matters without object duplication, and polled to trigger new processes. End-to-end lifecycle management lets matter managers handle case progress and completely dispose of unneeded information at the end of the matter lifecycle. Throughout the data lifecycle, subsets of data can be held, while the normal retention and disposition policies are applied to the content not subject to any matter hold.

Organizations can keep track of search criteria that result in content collection, tags associated with the data, and source and routing information for every item. Content metadata remains unchanged and retention policies can be applied, allowing organizations to verify chain of custody from collection to delivery and protect against intentional or inadvertent deletion.

Tags can be applied to information under hold to indicate the value of the information to the matter or investigation. Content that is not relevant need not be preserved and thus can be removed, while some information may be privileged and must be safeguarded during the matter investigation.

FLEXIBLE EXPORT CRITERIA

Relevant content that is subject to external review, including content and associated metadata, can be delivered as PST or NSF files or via the EDRM XML industry standard format. Export activity criteria are captured and made available for review. Users can preview result sets, with status and totals clearly visible. Associated metadata (including source, route, Message ID, addresses) as well as custom metadata applied by the application (tags, custodians) can be exported as an EDRM XML, CSV, or TSV standard format file. This transport format provides an import mechanism to any legal software supporting the standard.

Comparing SourceOne Discovery Manager and Email Management's Discovery Express

Supported Feature / Functionality	Discovery Express	Discovery Manager
Allows each investigator to have his own "workspace"	●	●
Enhanced relational and full-text query support	●	●
Export to PST and NSF files	●	●
Advanced Matter Management		●
Legal Hold Folder Management		●
Customizable Metadata Tagging		●
Identity Management for Terminated Users		●

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To learn more about how EMC products, services, and solutions can help solve your business and IT challenges, [contact](#) your local representative or authorized reseller—or visit us at www.EMC.com.

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