

# case study

## Rational Retention Utilized Alfresco to Deliver an End-to-End Record Retention and e-Discovery Application

### Industry

Computer Software

### Solution

Document Management  
Records Management

### Challenge

Rational Retention (“RR”) develops software designed for retention policy enforcement and litigation response. RR’s core technology helps companies’ bring unstructured data into compliance with document retention and electronic discovery laws and regulations. It identifies documents whether on the desktop, file share, e-mail server, or document management system; classifies them; and effectuates enterprise retention policies.

From its inception in 2006, the company founders wanted to develop a complete, end-to-end solution that encompassed the enforcement of retention policies, e-discovery response capabilities, an internal litigation repository, and a hosted litigation repository. In order to do this, RR needed to incorporate document and records management functionality into its product portfolio so that customers could store and manage documents in one central repository.

RR understood that some customers would want to leverage their existing document management investments, but that many users required a complete solution that included modern records and document management capabilities. In order to capitalize on this market opportunity, the company needed to offer the most robust records and document capabilities at an affordable price.



### Results

- Reduces e-discovery and regulatory compliance
- Highly scalable solution
- Automates management of unstructured electronically stored information (ESI) for litigation
- Delivers end-to-end solution with records and document management
- Uses innovative and modern development environment

## Solution

The company was faced with either developing its own records and document management functionality or partnering with a third party. RR quickly identified Alfresco as the best solution, offering the rich functionality required and a flexible architecture at an affordable price. The company determined that proprietary technologies would place an added cost burden on customers and were cumbersome to use. Plus many of the proprietary solutions felt like legacy technologies and did not incorporate modern constructs and innovation around wikis and blogs that customers now expect in a document management system.

Alfresco provided RR a modern platform built on Java making it easy to integrate into the RR software environment. This enabled RR to offer a Records and Document Management module that includes DOD 5015.2 compliant records management, workflow, check-in/check-out, version control and advanced search. By leveraging Alfresco's implementation of the Common Interface File System (CIFS) and WebDAV protocols RR can ensure that wherever content resides it is controllable and can automatically be migrated to a central repository as required.



The RR product uses agents deployed within a customer's enterprise to identify user content. The agents extract text and metadata from documents for search, classification, analysis, retention and discovery response. Pursuant to policy RR can automatically move content from the desktop to the Alfresco repository for long term management and storage. Retention policies set within the Alfresco RM module may be enforced by the applied and enforced by the RR agents across the enterprise, ensuring that upon expiration all copies of a document, wherever they may reside are defensibly destroyed.

## Conclusion

With Alfresco, RR customers can archive and maintain full control over a range of e-mails, documents and enterprise content which must be captured, retained and made available for compliance and litigation purposes. By controlling documents throughout their lifecycle with Alfresco and RR, companies can save upwards of 50 percent on e-discovery and regulatory compliance.

RR is now the only company in its space to provide customers with a highly scalable, end-to-end solution with a faster return on investment. No product on the market today offers the level of visibility, unprecedented control and security as Rational Retention — all without asking users to change how they work.

“By integrating Alfresco into RR's unique information compliance platform, we are delivering what is merely the promise of many competitors. With enterprise scalability, auto-classification, preserve in place, advanced analytics and integrated review and production, we provide a complete solution at a fraction of what it would cost to cobble together point products. By combining our deep knowledge of the litigation vertical with Alfresco's expertise in records and document management, we are setting the standard for document lifecycle and discovery response solutions.”

— Michael McCreary, CEO Rational Retention