Capture for Financial Services

Remove restrictions on your employees' use of the latest, most productive IM & collaboration tools

Key Features

Direct capture and native format

Attachment support

Message threading and attachments

Automatic indexing

Profile and identity management

Smarsh Connected Archive and external archive support

Why capture IM & collaboration content?

IM & collaboration tools are overtaking email as employees' chosen method of conducting business. As part of a highly regulated and litigious industry, you are required to retain and supervise these communications. Additionally, your business needs to be able to search and access emails for e-discovery and internal investigations of the new and existing collaboration tools.

Retaining IM & collaboration messages centrally alongside all your other communications both exposes conversational context and enables the application of uniform compliance processes. It results in a significantly more efficient review process, lower costs to your organization and better outcomes.

How it works

Smarsh has developed close relationships with the leading IM & collaboration platforms. What this means for our customers is compliant access to all the latest channels such as Microsoft Teams, Slack, Zoom, Webex and others.

The capture and archiving of all this data can be enabled for either individuals or across your entire organization directly — without relying on third parties. Once captured, all content is automatically sent encrypted to the Smarsh Enterprise Archive or any existing archive, application or data lake where it is available for fast, on-demand search alongside all other archived communications.

Archived content is threaded together to show the full context of the conversation. Capture is fully compliant, preserving chain of custody and identifying user identities across channels.

smarsh®

Capture for Financial Services

Remove restrictions on your employees' use of the latest, most productive IM & collaboration tools

Supported channels include:

- **B**   Bloomberg
- ChatGPT Enterprise
- Cisco UCM / Jabber
- Citrix Sharefile
- HCL Connections Social Cloud
- ICE Chat IM
- Microsoft Teams
- Miro
- QQ Messenger
- Saleforce Chatter
- Sharepoint
- Skype
- Slack
- Symphony
- Viva Engage
- Webex Teams
- Zoom

Key benefits:

Meet regulatory requirements and resolve internal disputes

Capture, archive, supervise and discover all your electronic communications to meet FINRA, SEC and other regulatory requirements and help resolve internal disputes. Preserve chain of custody and retain messages for as long as your business needs.

Improve review effectiveness

Empower your legal and compliance teams with an enhanced review experience. IM & collaboration content is threaded together in its native form to show full conversational context alongside all other communications.

Reduce time, cost and complexity

Streamline compliance and e-discovery workflows by using one archive instead of many for your email, IM & collaboration, social, mobile text and voice content. SDK capabilities allow for the capture of custom content via APIs.

Illuminate and reduce risk

Tag, search, track and review full context conversations across all channels to easily identify risk. Leverage our APIs to extract additional business insights from your communications data.

Support new and global communication trends

Adapt to support the latest, most productive IM & collaboration channels while ensuring complete compliance with regulatory demands.

Additional content available via API/SDK

US: +1 (866) 762-7741   UK: +44 (0) 20 3608 1209   www.smarsh.com   smarsh®