OpenText Records Management

Lifecycle management for all enterprise content

A key component of the OpenText Content Suite, OpenText Records Management empowers everyone in your organization to file all corporate holdings according to organizational policies, managing the complete lifecycle of all enterprise information, ensuring regulatory compliance, reducing the risks associated with audit and litigation and maximizing the value of the information.

OpenText Records Management provides records management services to the OpenText Content Suite. By providing a common records management service for all types of information, OpenText Records Management provides an automated system that removes the complexities of electronic records management, making the process completely transparent to your end-users. OpenText Records Management features are embedded in the interface of the respective application, enabling users to access records management functions in the interface with which they are most familiar.

Enable centralized and consolidated access to information

By classifying enterprise content as business records, you are also identifying the business context and value of corporate information. Accordingly, the entire records management process gives organizations a much clearer understanding of what enterprise content represents. Good enterprise records management helps to extract maximum value from documents; making the most of business content. OpenText Records Management improves access to enterprise information, giving all users the ability to create, classify, manage, and retrieve physical and electronic information.

Deploy a solution compatible with multiple content types and repositories

Business processes are driven by a number of different types of physical and electronic documents, all of which require proper management to promote corporate agility and compliance. Contracts form the backbone of partner and customer relationships. Transactional content, such as loan applications, customer complaints, orders, and claim forms move basic back-office processes. Across all industries content must be retained for legally-prescribed time periods, and managed according to corporate policies. OpenText
Records Management can manage the classifications and retention schedules of all types of content adding records management details and metadata, dispositions, holds classifications, and more to all your content, regardless of type. To meet the unique retention requirements of different content types, OpenText Records Management supports the application of multiple classifications, holds and retention schedules to individual records. Content can hold two or more record classifications, and be retained according to multiple retention schedules. Combine classifications and schedules to meet the unique retention and disposition needs of all content.

Besides coping with different content forms and retention requirements, enterprises must also manage content in a variety of storage media and systems. OpenText Records Management can manage content in a number of different repositories, including Microsoft® SharePoint®, SAP® applications, eDOCS, Exchange, Lotus® Notes®, file systems, and supports a mixed hardware storage environment.

Streamline and automate retention and deletion processes
OpenText Records Management provides options for classifying information quickly and easily. Classify information interactively with a single click, automatically inherit retention schedules and classifications by moving records en masse into folders, classify records based on roles or business processes or auto-classify content. Further increase efficiency through automatic import of retention policies and other data into OpenText Records Management. OpenText Records Management maps record classifications to retention schedules, which fully automates the process of ensuring records are kept as long as legally required, and assuredly destroyed when that time elapses. When a retention schedule expires, final decisions can be made to destroy the object, retain it for a period of time, or keep it indefinitely.

Ensure transparency and accountability through comprehensive auditing
Activities in the system are audited, with detailed logs maintained, ensuring that all activities of interest are documented. Carefully track when and which documents are purged from the system, and generate high-level views of all system activity in case of litigation or audit.

Control, monitor, and simplify the disposition process
Powerful disposition automation, reporting, and searching provide enhanced control and awareness surrounding the disposition process.

- **Automated dispositioning**: Automate the disposition of records according to organizational requirements. Selection of which stages in the lifecycle to automate, and which to send for more formal approvals.
- **Detailed disposition reporting**: Create full and detailed listings of records that are ready for review or final disposition, and route listings to appropriate individuals for review and approval.
- **Disposition searching**: Perform disposition searching against items. Searching calculates the disposition date of the items based on the RSI schedule, and returns the records ready for deletion, archiving, or moving on to the next stage in their lifecycle.

Ensure the preservation of critical records
In the event of litigation or investigation, it is imperative that organizations secure potential evidence from destruction.

- **Vital record identification**: Support vital record identification and the cycling of vital records based on pre-set periods, such as monthly, quarterly, and annually.
- **Official record designation**: Ensure enterprise-wide integrity of all business-critical knowledge by marking documents as official, thus preventing users from modifying the information in any way.
- **Apply legal holds based on keywords, users, collections, searches or references to other content**: Suspend retention schedules and protect content from deletion with legal holds. Apply multiple legal holds to documents at the same time.

Manage physical records
Control physical items such as paper records, equipment, and more.

- **Barcode label management**: Support the use of XML-based color labels and barcode labels for physical records such as folders, boxes, and shelves.
- **Warehouse management**: Box items and send transfers to internal or offsite storage facilities.
- **Circulation management**: Allow users to borrow, request for future borrowing, and pass either single or multiple records in a single step. Users can box items and send transfers to internal or offsite storage facilities.
Extend records control into external repositories

Extend records management initiatives across all corporate information repositories.

- **Fully integrate archiving:** Enable the long-term storage of records in a compliant storage environment. Use the stages in a records lifecycle or changes in the record’s status to automatically migrate it to different storage media.

- **Extract records into a secure, centralized repository:** Manage records in external repositories as “in place”, or physically extract and automatically replace records with shortcuts, enabling secure content archiving in a centralized, compliant storage environment while still allowing end user access directly from application.

- **Embed records management into OpenText Content Suite:** OpenText applications such as OpenText Contract Management, OpenText Regulated Documents or OpenText Archive for Google Apps or OpenText add-ons such as OpenText Email Management, OpenText Application Governance & Archiving for Microsoft® SharePoint® or OpenText Extended ECM for SAP® Solutions enable organizations to seamlessly embed records management into all applications and processes used every day, without changing the way users access and work with content.

“Using the OpenText records management and classification practices, we have been able to reclaim over one terabyte worth of storage space as people are cleaning up in addition to classifying content. It is estimated that we will reduce the legal fees associated with e-discovery by 50 percent annually.”

SCOTT GRANGER, MANAGER, INTRANET PORTALS AND CONTENT MANAGEMENT AT SPRINT