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OpenText Records Management

Automatically apply information governance policies, reduce the risk and costs associated with eDiscovery and control the lifecycle of all enterprise content

Simplify and automate records retention and reduction

Ensure the long-term preservation of critical content

Visualize information governance via dashboards

Enhance corporate accountability and compliance

Business processes are driven by several different types of physical and electronic documents. Organizations that do not employ a comprehensive electronic records management solution are vulnerable to compliance issues, security threats, high costs of litigation, confidentiality breaches and more. By adopting a disciplined, enterprise-wide records management strategy, records managers and compliance officers ensure compliance with external regulations and internal policies.

A key component of OpenText™ Content Suite, OpenText™ Records Management provides a common records management service for all types of information. Records managers benefit from automated and transparent processes that remove the complexity and labor requirements traditionally associated with managing critical enterprise information. Records Management capabilities can also be embedded via OpenText™ Extended ECM into lead applications, such as SAP®, Salesforce®, Oracle® and Microsoft®.

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> *"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 eDiscovery by 50 percent annually."*

Scott Granger
Manager, Intranet Portals and Content Management
Sprint

→ Read the customer story

Simplify and automate records retention

Policies can be applied quickly and easily with minimal user involvement by:

- Applying default classifications on upload
- Automatically inheriting classifications from the parent folder or business workspace template
- Classifying records based on creator role or document type
- Applying classifications through business workflow processes
- Assigning designations through search results and collections
- Auto-classifying content behind the scenes
- Seamlessly embedding records management capabilities into applications and processes used every day, without changing the way users access and work with content

Administrators can further increase efficiency with bulk importing of retention policies and other data into Records Management.
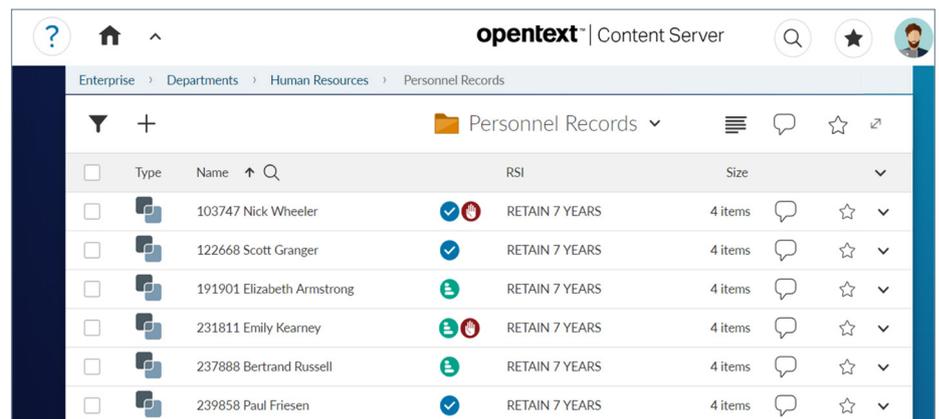
With visual indicators, records managers and designated personnel can instantly see whether objects are records, final releases or on hold

Ensure the long-term preservation of critical records

Organizations must secure and retain business information from a growing number of sources for both compliance and litigation purposes. With Records Management, records managers and administrators can identify vital records, simplify record designation, apply legal holds, track information requests, ensure transparency and accountability through comprehensive auditing and meet the technical preservation requirements necessary for SEC 17a-4 certification.

Visualize records management data via dashboards

With visual indicators, users can easily see whether objects are records, final releases or on hold. Records Management, Physical Objects, Security Clearance reports and user perspectives provide role-based, visual windows for managing content.

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Certifications and compliance

OpenText Records Management meets numerous regulatory compliance requirements and certifications, including:

U.S. Department of Defense 5015.02-STD v3 certification for baseline requirements and classified records

- U.S. DOD 5015.02 STD v3 certification for OpenText™ Application Governance & Archiving for Microsoft® SharePoint®, OpenText™ Extended ECM for SAP® Solutions, OpenText™ Extended ECM for Oracle® E-Business Suite, OpenText™ File360 and OpenText™ Public Information Request Tracking

- The National Archives Electronic Records Management Systems certification—UK Governments 2002 requirements

- Australian Victorian Electronic Records Strategy (VERS) 1-5

- SÄHKE2

- ISO 15489 compliance in combination with internal policies

- SEC 17a-4 with Archive Server

- U.S. Section 508 compliance

- U.S Food and Drug Administration 21 CFR Part 11

Visual role-based perspectives make it easier to manage Records Management, Physical Object and Security Clearance content

Enhance corporate accountability with extensive security and auditing

Across all industries, an increasing amount of content must be retained for legally prescribed time periods and managed according to corporate policies. Records Management can add security clearance levels and trigger additional security through metadata, under-disposition control and legal holds. Extensive audit capabilities track hundreds of actions to securely manage and defensibly dispose of content.

Learn more about the range of OpenText Professional Services that leverage decades of best practice experience in content management software to unlock the full value of OpenText™ Records Management.

opentext.com/products-and-solutions/services

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Product feature	Description
Integrate with applications	Integrates with numerous applications through Extended ECM solutions.
Automate information governance and security	Apply retention and preservation with minimal user involvement through intelligent classifications, realtime automation of holds, automated scheduled disposition and export to a long-term preservation solution, such as OpenText™ Archive Center
Demonstrate defensible disposition	Automates the process of ensuring records are maintained if legally required and defensibly destroyed at the end of the lifecycle; features include detailed disposition reports, disposition review and approval process, destruction reports and rich audit features
Manage physical records alongside electronic records	Relies on one system to manage the lifecycle of physical and electronic records Create, label and manage any type of physical item, track and transfer records and manage capacity with built-in storage warehouse management capabilities and know the location of physical records with circulation management
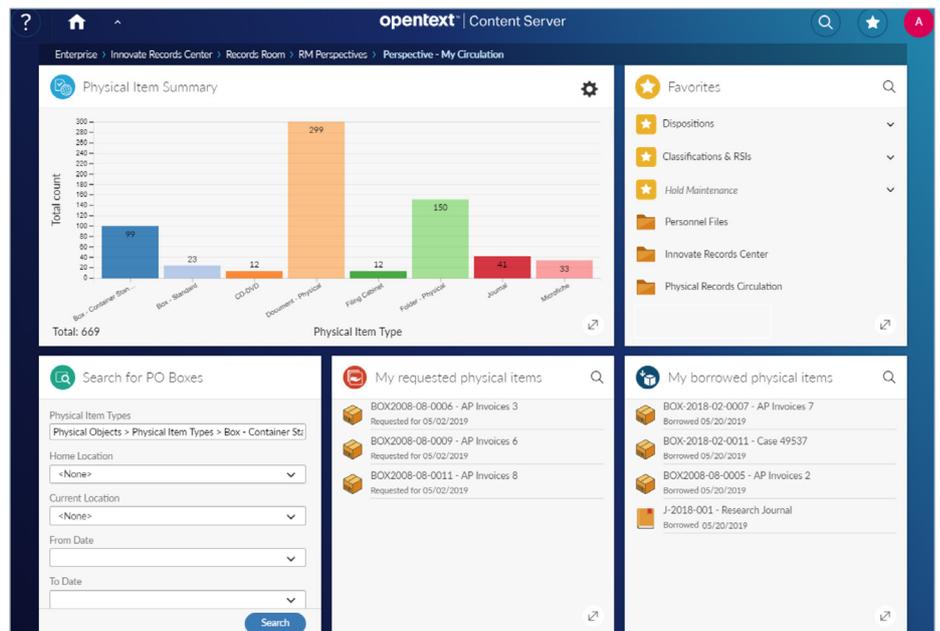
Physical record perspectives build physical item summaries and track circulation of records

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