With the daily pressures to comply with regulations, reduce risk and streamline operations for greater profitability, managing the lifecycle of corporate information assets is a business-critical capability—one that OpenText Records Management and the OpenText Enterprise Information Management (EIM) technologies deliver.

When content such as email, documents and boxes of paper files are managed like business records, and managed from creation to deletion, your organization can assure significantly reduced litigation and audit risks. Policies and practices are consistent and defensible and improved operational efficiencies for discovery and preservation ensure faster and less costly information acquisition for legal and regulatory inquiries. Productivity also increases through more efficient content tracking and reuse.

In addition to records management, OpenText EIM technologies and business solutions incorporate auto-classification, eDiscovery, email management and collaboration in a unified framework, providing lower total cost of ownership and accelerated return on investment.

Records management continued

Capture content from Microsoft SharePoint so that it can be managed in accordance with regulatory and business requirements	☐
Integrate with mySAP® Business Suite systems to provide full lifecycle management for documents associated with business transactions	☐
Capture documents from Windows and other file systems into the centralized records management system	☐
Ensure that records in external repositories are not deleted or modified by adjusting permissions on the linked items	☐
Provide search capabilities in support of knowledge mining, discovery in response to an event and attestation of compliance with governance requirements	☐
Provide a full set of extensible web services for integrating with other content repositories	☐

Certification and compliance
Does the solution ensure regulatory compliance?

U.S. Department of Defense 5012.02-STD certification, including management of classified records	☐
UK government's National Archives Electronic Records Management Systems certification, 2002 requirements	☐
Australian Victorian Electronic Records Strategy, VERS (specs 1-5)	☐
ISO 15489 compliance	☐
U.S. Food and Drug, Administration 21 CFR Part 11 compliance	☐
U.S. Section 508 compliance	☐
SEC 17a-4	☐

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Records management scorecard

Use this scorecard to learn how OpenText™ Records Management capabilities will help you manage the full lifecycle of all your electronic and physical content

Classification/File plan management
Does your classification structure support all enterprise content?

Create unlimited levels in the classification file plan ☐

Support hierarchical and/or functional classification taxonomies ☐

Configure records metadata for any record type ☐

Search for records using descriptive classification metadata ☐

Capture and manage any type of information, including electronic and physical objects, images, reports, blogs, wikis, CDs, URLs, microfilm, etc. ☐

Provide multiple methods to classify content (manual and/or automatic classification of content) as they are added to the repository ☐

Use favorites, picklists and inheritance for ease of classification ☐

Establish thesaurus terms for enforcing naming conventions on file and records series titling ☐

Identify and manage vital records ☐

Mark records as official, making them unalterable by users ☐

Allow multiple file classifications to be assigned to a single record ☐

Support bidirectional cross-referencing of records ☐

Place holds on classifications, ensuring that classified records will be retained even though their policy-based retention period has expired ☐

Auto-Classification
An auto-classification application designed to be used by records managers

Provide a method to classify content without end-user intervention ☐

Provide transparency in how classifications are applied and how accuracy can be improved ☐

Provide random sampling and review to support ongoing quality assurance and defensibility ☐

Circulation management
Can users easily request records for retrieval immediately or at any future date?

Allows users to request physical objects that they are authorized to access via email ☐

Create color and barcode labels for physical records ☐

Enable batch printing of labels ☐

Check records in and out using barcodes, with adherence to security permissions ☐

Support using remote barcode scanners to check records in and out ☐

Circulation management continued

Generate lists of physical records to retrieve from storage ☐

Support passing of checked-out records to another user ☐

Generate return notices for records that are overdue or need to be returned by a designated date ☐

Provide a user dashboard to acknowledge receipt of items and flag for pickup ☐

Embed creation of physical items using a workflow ☐

Space/Warehouse management
Can the solution track the location of all records at any point in time?

Track all types and sizes of storage containers within storage locations ☐

Define storage facilities (down to shelf dimensions) for space management ☐

Transfer boxes to storage, tracking location of boxes throughout the transfer process (barcode-enabled) ☐

Report on total and free space available across all storage facilities ☐

Track location of objects in third-party storage provider facilities ☐

Support transferring physical records to external caretakers ☐

Enable records to automatically inherit the location from their parent container object ☐

Verify and correct the contents of storage locators with the data in the system ☐

Hold management and litigation support
Does the solution support collection, preservation, export and other eDiscovery requirements?

Allow authorized users to create, apply, view or remove legal holds for individual or multiple records in a single step ☐

Define types of holds and length of time holds should be applied to records ☐

Assign multiple holds to records concurrently ☐

Resume assigned retention and disposition cycle for records once holds have been removed ☐

Maintain complete audit trail of those who assigned and removed holds ☐

Create collections of records and apply holds to the entire collection ☐

Apply holds by custodian, date range, keyword and complex search criteria; support scheduled searches to preserve newly created content that meets the criteria of the search ☐

Email management
Does the solution provide a means of managing the lifecycle of email?

Automatically or interactively extract email from Microsoft® Exchange or IBM® Notes® and Domino® to ingest into the managed ECM repository ☐

Drive controlled retention and disposition of email content by associating record classifications to ingested email messages ☐

Automatically classify according to message content and email-specific metadata criteria ☐

Support multiple approaches to classify email ☐

Lock down managed email messages with integrated legal hold capabilities ☐

Provide user-based or enterprise-wide full text search of managed email content ☐

Reduce cost and complexity of the email environment with single-instance archiving, de-duplication and compression ☐

Retain content on different storage media based on an object's context, use, classification and retention requirements ☐

Archive and govern instant messages in accordance with the same policies as email ☐

Allow ingestion rates of more than seven million messages per day while simultaneously dispositioning more than eight million messages per day ☐

Repository architecture
Does the solution provide options for managing multiple application data stores across heterogeneous storage environments?

Long-term storage media: Map logical lifecycles onto connected storage platforms according to the records management classification, including support for a complete vital records program ☐

Intelligent storage management: Derive physical storage location from retention schedules; each stage in a record's lifecycle can represent a migration of data to an alternate, more cost-effective storage media ☐

External file store: Store records on different file systems according to corporate rules and policies ☐

Third-party repositories: Control records in external third-party repositories according to corporate rules and policies ☐

Records management
Does the solution extend its records management capabilities to content in external repositories?

Extend classifications, disposition actions and hold management to content in external repositories ☐

Capture and manage: email from Microsoft Exchange and Domino, content and sites from Microsoft® SharePoint® documents from SAP® and Oracle eBusiness Solutions and capture content from Windows® and other file systems according to policies and schedules ☐