

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 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, archiving, document management, collaboration, and more 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	<input type="checkbox"/>
Integrate with mySAP® Business Suite systems to provide full lifecycle management for documents associated with business transactions	<input type="checkbox"/>
Capture documents from Windows and other file systems into the centralized records management system	<input type="checkbox"/>
Ensure that records in external repositories are not deleted or modified by adjusting permissions on the linked items	<input type="checkbox"/>
Provide search capabilities in support of knowledge mining, discovery in response to an event, and attestation of compliance with governance requirements	<input type="checkbox"/>
Provide a full set of extensible web services for integrating with other content repositories	<input type="checkbox"/>

Certification and Compliance

Does the solution ensure regulatory compliance?

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

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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	<input type="checkbox"/>
Support hierarchical and/or functional classification taxonomies	<input type="checkbox"/>
Configure records metadata for any record type	<input type="checkbox"/>
Search for records using descriptive classification metadata	<input type="checkbox"/>
Capture and manage any type of information, including electronic and physical objects, images, reports, blogs, wikis, CDs, URLs, microfilm, and so on	<input type="checkbox"/>
Provide multiple methods to classify content (manual, automatic, and/or assisted classification) of content as they are added to the repository	<input type="checkbox"/>
Use favorites, picklists, and inheritance for ease of classification	<input type="checkbox"/>
Establish thesaurus terms for enforcing naming conventions on file and records series titling	<input type="checkbox"/>
Identify and manage vital records	<input type="checkbox"/>
Mark records as official, making them unalterable by users	<input type="checkbox"/>
Allow multiple file classifications to be assigned to a single record	<input type="checkbox"/>
Support bidirectional cross-referencing of records	<input type="checkbox"/>
Place holds on classifications, ensuring that the classified records will be retained even though their policy-based retention period has expired	<input type="checkbox"/>

Auto-Classification An auto-classification application designed to be used by records managers.	
Provide a method to classify content without end-user intervention	<input type="checkbox"/>
Provide transparency in how classifications are applied and how accuracy can be improved	<input type="checkbox"/>
Provide random sampling and review to support ongoing quality assurance and defensibility	<input type="checkbox"/>

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	<input type="checkbox"/>
Create color and barcode labels for physical records	<input type="checkbox"/>
Enable batch printing of labels	<input type="checkbox"/>
Check records in and out using barcodes, with adherence to security permissions	<input type="checkbox"/>
Support using remote barcode scanners to check records in and out	<input type="checkbox"/>

Circulation Management continued	
Generate lists of physical records to retrieve from storage	<input type="checkbox"/>
Support passing of checked-out records to another user	<input type="checkbox"/>
Generate return notices for records that are overdue or need to be returned by a designated date	<input type="checkbox"/>
Provide a user dashboard to acknowledge receipt of items and flag for pickup	<input type="checkbox"/>
Embed creation of physical items using a workflow	<input type="checkbox"/>

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	<input type="checkbox"/>
Define storage facilities (down to shelf dimensions) for space management	<input type="checkbox"/>
Transfer boxes to storage, tracking location of boxes throughout the transfer process (barcode-enabled)	<input type="checkbox"/>
Report on total and free space available across all storage facilities	<input type="checkbox"/>
Track location of objects in third-party storage provider facilities	<input type="checkbox"/>
Support transferring physical records to external caretakers	<input type="checkbox"/>
Enable records to automatically inherit the location from their parent container object	<input type="checkbox"/>
Verify and correct the contents of storage locators with the data in the system	<input type="checkbox"/>

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	<input type="checkbox"/>
Define types of holds and length of time holds should be applied to records	<input type="checkbox"/>
Assign multiple holds to records concurrently	<input type="checkbox"/>
Resume assigned retention and disposition cycle for records once holds have been removed	<input type="checkbox"/>
Maintain complete audit trail of those who assigned and removed holds	<input type="checkbox"/>
Create collections of records and apply holds to the entire collection	<input type="checkbox"/>
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	<input type="checkbox"/>

Email Management Does the solution provide a means of managing the lifecycle of email?	
Automatically or interactively extract email from Microsoft® Exchange® or Lotus® to ingest into the managed ECM repository	<input type="checkbox"/>
Drive controlled retention and disposition of email content by associating record classifications to ingested email messages	<input type="checkbox"/>
Automatically classify according to message content and email-specific metadata criteria	<input type="checkbox"/>
Support multiple approaches to classify email	<input type="checkbox"/>
Lock down managed email messages with integrated legal hold capabilities	<input type="checkbox"/>
Provide user-based or enterprise-wide full text search of managed email content	<input type="checkbox"/>
Reduce cost and complexity of the email environment with single-instance archiving, de-duplication, and compression	<input type="checkbox"/>
Retain content on different storage media based on an object's context, use, classification, and retention requirements	<input type="checkbox"/>
Archive and govern instant messages in accordance with the same policies as email	<input type="checkbox"/>
Allow ingestion rates of over 7 million messages per day while simultaneously dispositioning over 8 million messages per day	<input type="checkbox"/>

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	<input type="checkbox"/>
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	<input type="checkbox"/>
External file store: Store records on different file systems according to corporate rules and policies	<input type="checkbox"/>
Third-party repositories: Control records in external third-party repositories according to corporate rules and policies	<input type="checkbox"/>

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	<input type="checkbox"/>
Capture and manage: email from Microsoft Exchange and Lotus Domino, content and sites from Microsoft SharePoint®, documents from SAP®, and capture content from Windows®, and other file systems according to policies and schedules	<input type="checkbox"/>