

■ **Product Overview**

Open Text Records Management

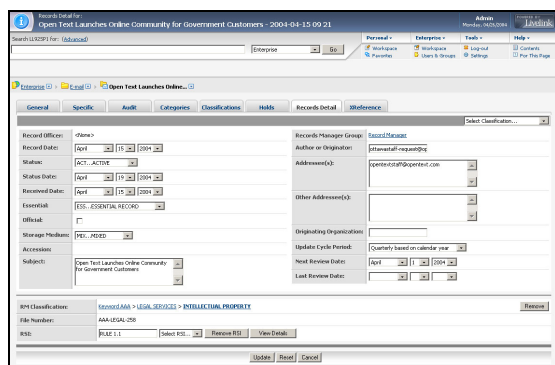
Lifecycle management for all enterprise content

A key component of the Open Text ECM Suite, Open Text Records Management empowers everyone in your organization to file all corporate holdings according to organizational policies, managing the complete lifecycle of all corporate records, ensuring regulatory compliance, and reducing the risks associated with audit and litigation.

Open Text Records Management provides records management services to core Open Text ECM Suite components (for example, Open Text Content Lifecycle Management (CLM), Open Text Email Management, Open Text File System Archiving) and Open Text ECM Suite applications (for example, Open Text CLM Services for Microsoft SharePoint, Open Text Extended ECM for SAP® Solutions, Open Text Regulated Documents). Open Text 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. By providing a common records management service for all forms of information, Open Text Records Management provides an automated system that removes the complexities of electronic records management, making the process completely transparent to your end-users.

“We now have a standard and enforceable process by which the entire organization maintains all communications and work files. We’re working efficiently together, reducing business risks and protecting our intellectual capital.”

Noella Bordian,
Corporate Records Manager,
TransLink



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. Open Text Records Management improves access to enterprise records, giving all users the ability to create, classify, manage, and retrieve paper and electronic information.

Manage enterprise content as a business record.

Deploy a solution compatible with multiple document types and repositories

Business processes are driven by a number of different types of paper 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. In heavily regulated industries, documents must be retained for legally-prescribed time periods, and with recent legislation, even email can constitute a business record.

Open Text Records Management can manage the classifications and retention schedules of all of these types of documents. Add records management details, holds, classifications, labels, and cross references to all of your documents, regardless of type. To meet the unique retention requirements of different document types, Open Text Records Management supports the application of multiple file classifications and retention schedules to individual records. Documents 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 record types.

Besides coping with different content forms and retention requirements, enterprises must also manage documents in a variety of storage media and systems. Open Text Records Management can monitor content in a number of different repositories, including Microsoft Office SharePoint Server, SAP applications, and generic file systems, and supports a mixed hardware storage environment.

Streamline and automate retention and deletion processes

Open Text Records Management provides options for classifying records quickly and easily. Classify records interactively with a single click, or automatically inherit retention schedules and classifications by moving records en masse into folders. Further increase efficiency through automatic import of retention policies and other data into Open Text Records Management from IRCH Retention Manager.

Benefits

- Improves productivity and accelerates user adoption.
- Minimizes corporate risk and enhances accountability.
- Ensures knowledge integrity.
- Streamlines records retention and destruction.
- Manages enterprise content as business records, no matter where they live, without impacting the way users work.
- Enables cost-effective long-term storage of content.

Product Overview

Open Text 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

All activities in the system are fully audited, with detailed logs maintained, ensuring that all disposition activities 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.
- **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, 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**—Suspend retention schedules and protect records from deletion with legal holds. Apply multiple legal holds to documents at the same time.

Manage physical records

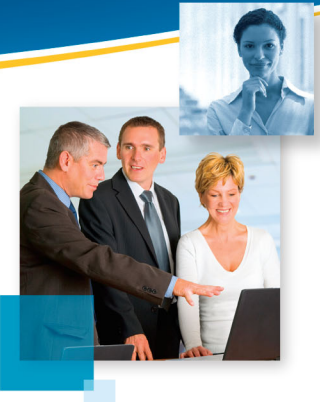
Control physical items such as paper records, equipment, and more.

- **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.
- **Embed records management into Open Text ECM Suite applications**—Open Text applications such as Open Text Email Management, Open Text Content Lifecycle Management Services for Microsoft SharePoint, and Open Text Extended ECM for SAP Solutions enable organizations to seamlessly embed records management into the applications used every day, without changing the way users access and work with content.



Technical Specifications

- Supports integrations with Microsoft SharePoint, SAP applications, Open Text Enterprise Library repositories, Microsoft Exchange, and Lotus Domino.
- Supports a mixed storage environment of all major hardware vendors, including EMC², Hitachi Data Systems, IBM, SUN, NetApp, and more.

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