Alfresco Records Management

Governance, Retention, and Compliance

Over the last few years there has been a significant increase in the number of organizations implementing Governance, Retention and Compliance policies and procedures. Driven by a need to comply with stricter legislation and a desire to show greater levels of corporate transparency and responsibility, companies are turning to technology to help ensure compliance with these corporate rules and procedures. Records Management (RM) solutions can help capture, control and manage vital corporate information, much of which resides in business documents, emails, financial reports etc. But traditional Records Management solutions have still not seen the wide scale adoption and the realization of the benefits promised.

Traditional Records Management Solutions

Most Records Management solutions, in the market today, are expensive, complex and designed to meet the needs of records managers and compliance officers. But these solutions were never designed to meet the needs of today's workforce. They do not make it easy to collaborate, allowing users to create and review content and simplify the process of getting work done. These traditional RM systems have a number of issues:

⊕ Inconsistent Information: The need to transfer information from multiple separate systems in to the Records Management solution leads to out of date information and inconsistency of records;

⊕ Lack of Adoption: Designed to be used by record management specialists, typical Records Management solutions are too complex for end users, leading to limited adoption;

⊕ Inconsistent Adoption: Not designed to support the different types of content in use today — Documents, eMail, Web Pages, Images, Mobile, Social, and Scanned Files, etc. — that are all managed in separate systems but need to be under the control of a central Records Management solution; and,

⊕ Complexity: Having separate systems to manage different types of information that needs to be synchronized with Records Management system increases the complexity and cost.

Alfresco Records Management

Designed as a simple to use, simple to deploy Open Source solution, the Alfresco Records Management solution removes many of the hurdles associated with traditional RM solutions. Although certified to the DoD 5015.02 standard, the Alfresco RM solutions has been implemented on top of a flexible records management metadata model, allowing other standards (such as MoReq2010, NOARK, etc.) to be supported.

Significant Benefits of Alfresco Records Management:

- Hybrid ECM—Allow external collaboration to keep content under control at all times and declare when needed;
- Increased User Adoption One solution to support all content, within a single repository, with easy to use clients removes end user complexity and leads to far greater user adoption;
- Single Repository— Allows the management of all electronic files (documents, web pages, emails, images, corporate records, mobile uploads and social media posts, etc.) in the industry's most scalable, CMIS compliant, repository;
- Simplicity—Single user interface for managing both standard content and corporate records; and,
- Reduced Cost—No upfront Enterprise license fees. No per user seat pricing. Ability to leverage cost effective Open Source technology stack. Simplified ongoing maintenance through single system. All lead to a dramatically lower Total Cost of Ownership.

Alfresco
Simple + Smart™

Capture

The Alfresco RM solution allows the filing of new records from a variety of simple to use interfaces. Adopting industry standards removes the need to install local client applications on an individual's computer. This zero footprint client approach provides support for:

⊕ Browser: Alfresco provide a web-based client to allow easy access from any location. Users can upload, declare and manage corporate records via a simple to use web browser interface.
⊕ In-Place Records: Users can declare records from anywhere within Alfresco. In-place allows end users to access records in a way that makes sense to them while providing the control needed by Records Managers.
⊕ Mobile Capture: Users can access and update files from a range of mobile devices (tablets and smart phones) and have server side rules enforce compliance policies.
⊕ Automated Declaration: Records Managers can declare rules that define when a record should be declared. Users now just work with their documents and Alfresco does the rest.
⊕ Network Drive: Supporting the industry standard Common Internet File System (CIFS) and WebDAV interfaces allows the Alfresco RM repository to appear just like a shared Network Drive. This allows all users to simple drag-and-drop files into the RM solution from their desktop.
⊕ Pre-population of Meta-data: The ability to extract and use information inherent in the document and email content to pre-populate records metadata, reduces the time needed to declare new records.

Manage and Control

Once new records are added the Alfresco RM module provides functionality to manage the life cycle of records while controlling access. These features include:

⊕ Dynamic Fileplan: Automatically file and declare records based on configurable rules. New record folders are created as needed, removing administration over head;
⊕ Auto-Numbering: Provides the capability to automatically and sequentially number vital corporate records;
⊕ Type-based Metadata: Classify and schedule records based on configurable records based types;
⊕ Automated Lifecycle Management: Use simple to configure rules to control and schedule content review, cut-off, transfer and archive;
⊕ Configurable Dashboards: Allows records management specialists to configure the system dashboards with pre-defined reports to search and screen records—allowing for the easy identification and resolution of exceptions; and,
⊕ Rapid eDiscovery: Provides users with a simple to use search across full-text content, fileplan structures, records management categories and record types.

Disposition

At some point corporate records will come to the end of their useful life. These records need to be destroyed, archived or transferred to another system. The Alfresco RM solution provides:

⊕ Full Disposition Support: Controlled and scheduled handling of archiving, holds, transfers, accessions and destruction using configurable rules and automated processing;
⊕ Retention and Archive Policies: Ability to configure different retention and archive policies based on type and fileplan;
⊕ Automated Conversion: Routines that automatically convert documents from proprietary formats to a long-term vendor neutral archival format, such as PDF and ODF and;
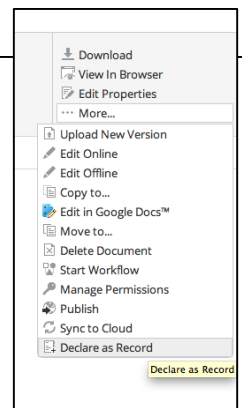
About Alfresco

Alfresco helps teams share, manage and retain content across the extended enterprise with simplicity that end users love and smarts that IT can endorse. Alfresco enables organizations in more than 180 countries to collaborate more effectively, improve business process efficiency and ensure information governance. Across cloud, mobile, hybrid and on-premise environments, Alfresco is smart enterprise content made easy.
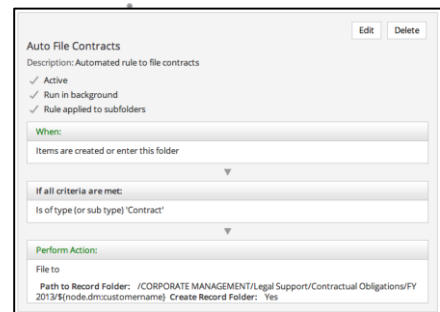
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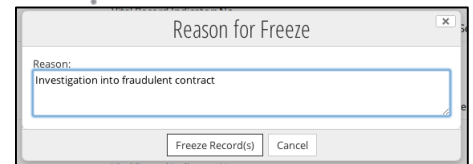
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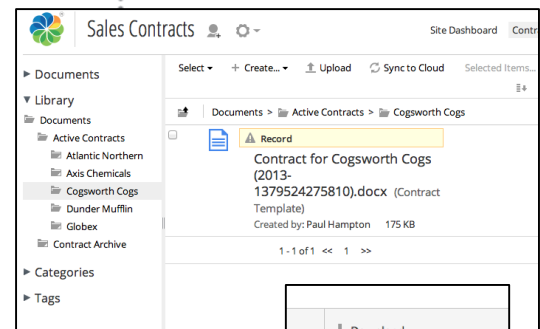
In-Place Records

In-Place Record Declaration

Auto-Filling of Records

Schedule a live demo at

alfresco.com/easyRM

Get Started Today!

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