



conceptClassifier Records Management



Enhancing Records Management in SharePoint

Whether your organization is driven by compliance, regulatory authorities or simply good management, implementing a business records management solution takes a lot of hard work, planning, and on-going management. For many organizations it is a never ending challenge.

We can help.

The Need

Records management is no longer just a compliance issue but impacts vastly different industries that need to document compliance for a wide range of regulatory bodies, show multi-national legal compliance, and illustrate a comprehensive audit framework. Developing the policy, processes, deployment, and management of a records management solution involves strong commitment by the organization at a variety of levels.

In most organizations electronic content still remains unmanaged. For many organizations this is no longer an option but a business requirement.

Features

- Automatic classification and taxonomy management
- Unique concept extraction resulting in compound term metadata generation
- Fully integrated with Microsoft Office to automatically classify documents when created - with the ability to manually override
- Uses Microsoft Enterprise Search
- Classification results integrated into the standard MOSS interface
- Delivered as web parts directly into MOSS 2007
- Fully SOA compliant services, based on open standards
- Simple to install, maintain, and administer

The Solution

conceptClassifier is an automatic classification and taxonomy management solution that is fully integrated with MOSS, MS Office, and Microsoft Enterprise Search. The product facilitates the implementation, deployment, and on-going maintenance of a records management solution.

Utilizing conceptClassifier unique compound term processing capability a taxonomy is developed based on the Records Retention Schedule that has been configured for use in the MOSS production environment, optionally an organization can also have the DoD.52 Add-on Pack installed. A workflow or custom router in MOSS is configured to automatically send uploaded documents, triggered on the add event, to the Records Center. The workflow inspects the 'retention code' custom property on the uploaded document and compares the value to the Records Center routing list and, if there is a match automatically moves the document to the Records Center and places a link to the document back in the Library where it was uploaded. The result, as documents are uploaded to the Libraries they can automatically be declared records. Users can still browse and find documents they have uploaded in the same location.

Documents can be automatically classified from within Microsoft Office at the time of creation eliminating end-user adoption issues.

Further customization can be configured to inspect other properties to trigger when the document should be moved.

The Benefits

- Eliminates end-user adoption issues through automatic classification from within Microsoft Office
- Automated records collection, classification, and organization thereby reducing costs, implementation and on-going management
- Facilitates the usage and retrieval of records, increasing productivity and business agility
- Protects the records integrity and the native security model
- Enable highly accurate search, retrieval, and collaboration capabilities increasing end user productivity and competitive advantages