

Using SharePoint for Records Management

Why not use a system you're already familiar with (and paying for) to centralize and manage all your records? Out of the box, SharePoint already provides basic records management capabilities but there are gaps for compliant information governance, here is a breakdown:

WHAT IT CAN DO

- Document Management
- Records Management
 - Time-based Retention
 - In-place or Records Center
 - Automated Destruction
 - Disposition Workflow on Single Document
- Keyword Search
- Legal Holds

WHAT YOU NEED

- File Plan Management
- Rules-based Automated Classification
- Case File Management
- Event-based Retention
- Custom Retention Workflows
- Legally-defensible Bulk Disposition Approval
- Physical Records Management
- Human-Readable Audit Tracking

SharePoint is powerful, but it can easily become a dumping ground for lost content if you don't take control. This is where Collabware CLM steps in!

Collabware CLM

Intelligent ECM and Records Management for SharePoint.

- Extend the capabilities of SharePoint to manage both your electronic and physical records.
- Integrate case management, workflows, search and records management automation.
- Achieve peace of mind knowing regulatory and legal requirements are being met.

With Collabware CLM you can control all aspects of content lifecycle and drive increased user productivity by helping them find and use content more efficiently.



Runs within your
existing SharePoint
infrastructure



Multi-farm
support via Service
Application model



Deployed using a
light-weight
installation tool



Fully documented
in-process & web
service APIs

Collabware CLM Features

Collabware CLM is intelligent information and records management software for SharePoint that centralizes and manages all aspects of the content lifecycle, including security, retention, review and disposition. With a focus on driving a simple, seamless and transparent user experience, Collabware CLM ensures organizations achieve high adoption and mitigate legal and regulatory risks.

- ✓ **Electronic Records Management**
Automate classification, tracking retention, security and eventual disposition of content and cases. Centrally configure rules and enforce them globally.
- ✓ **Physical Records Management**
Manage all records inventory and storage locations centrally while supporting open or request-based circulation processes. Easily integrate physical records processes through SharePoint-integrated search results.
- ✓ **Content Review**
Controlled review of bulk sets of content and cases based on your business requirements. Define periodic or volume-based reviews for any type of content.
- ✓ **Lifecycle Workflow**
Easily create complex workflows to manage the complete lifecycle of your content and cases. Using a familiar drag and drop interface, you can quickly automate your business processes.
- ✓ **Precision Search**
Advanced metadata queries to precisely locate content. With grid view metadata display, users can further group, sort, and filter results to ensure they are locating the correct content, faster.
- ✓ **Records Disposition**
Ensure defensible disposition with managed processes that simply integrates users into the review process. Perform reviews using pre-defined reviewer groups or define dynamic reviewer rules.
- ✓ **Discovery and Legal Holds**
Content is protected and cannot be modified or used in a disposition process while on hold. Content can be added to a hold individually, in bulk, or automatically.
- ✓ **Auditing and Reporting**
Track and log audit activities performed against all content in a centralized multi-dimensional data warehouse. Authorized users can generate dynamic reports based on audit activities and export the results in Excel format.
- ✓ **Case Management**
The Aggregates system for managing case templates and case instances allows you to define and enforce case governance rules.

Get Up & Running in 90 Days or Less

- SharePoint is familiar and reduces change management challenges.
- Collabware CLM integrates natively with SharePoint so there is no need for your technical teams to create new infrastructure or management processes.
- Simple "No code" drag & drop experience that automates SharePoint configuration.
- Collabware partners closely with you to implement our proven 90-Day methodology.

Contact Us

See how Collabware CLM can increase collaboration, productivity and compliance within your organization. Please contact us for more information and a personalized demo.



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