Records Manager

ENSURE YOUR CASE MANAGEMENT SYSTEM
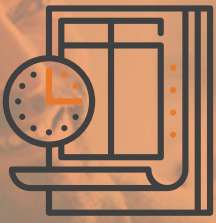FOLLOWS THE LEGAL RETENTION GUIDELINES

Ensures information is archived correctly, and legal retention periods are respected for each data-type stored within your case.

If your case-documents are structured properly within your ECM system, and the lifecycle of your cases is managed up to the archiving step, Records Manager allows you to complete the circle and delete data based on detailed rule sets.

Ensuring your knowledge workers follow company policy, can be done by replacing repetitive tasks with automation wherever possible.

Records Manager runs as a background process on archived dossiers, matters or any type of case in SharePoint / SharePoint Online. It allows organisations to configure retention policies for each type of case or specific document types. This guarantees retention policies are respected and organisations are compliant with the regulations of personal data.

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Key Features

- Records Manager is designed to run as a background application and does not require any user-interaction;
- Different sets of rules can be created and configured to make sure each type of case (such as HR Dossiers, Legal Matters or Internal Projects) will respect the applicable law and different users or teams are notified on permanent deletion of documents;
- Records Manager will provide a periodic summary of the files that will be deleted in the upcoming run and confirm successful delete actions over the last period;
- Organisations can choose to have Records Manager perform a permanent delete of files, or move the affected files to the recycle bin.

Typical use-cases

- Ensure documents are deleted in HR files, when employees leave the organisation in respect to the (local) retention periods;
- Ensure documents with personal data (like Curriculum Vitae) for potential new hires are deleted XX months after a job-interview;
- Ensure that legal matters in an archived state are deleted after the retention period has passed.

Repstor Custodian Integration

Records Manager can use Repstor's Custodian as a data source and delete Microsoft 365 objects based on the rule sets that combine Custodian meta-data, statuses and other logic.

Microsoft Power BI

Records Manager keeps track of scan and delete activities, statuses and interruptions. This information can be used by Microsoft Power BI for reporting purposes.

Windows Server 2012 or later	SQL Database 2014 or later	SharePoint Online/ Microsoft 365	Mail Provider (Sendgrid or SMTP)	.NET Framework 4.6.2 and later