



# Records Management

Connecting Creators with Compliance



The legacy of records management (RM) systems is one where solutions are often designed for dedicated compliance officers, not content creators. They are then deployed in a standalone environment, disconnected from corporate collaboration and ECM systems. This duplication of effort, moving documents from ECM to RM systems and back again, adds cost and complexity to information management leading to increased probability of non-compliance from errors in the process.

Complying with an ever-increasing number of regulations, overseen by more regulatory agencies, makes this job more critical than ever. Ultimately, any solution must be delivered in a cost-effective manner appropriate for today's budget realities.

## “Everyone's a Records Manager, and Nobody Knows It”

Zia provides Easy Records Management (Easy RM) solutions that work the way you do, connecting those who are creating content with the compliance process. Easy RM incorporates tools you use on a daily basis, increasing user adoption. Whether it's “in-process” records management, automated declarations of records, or intelligent rules for file plans, Easy RM solutions increase productivity and compliance. Additionally, Easy RM solutions are built on a single DoD5015.02 certified content hub for document and records management, reducing duplication and wrong version usage.

We believe RM tools should fit into an employee's daily work habits. This reduces barriers to adoption, duplication of efforts, and errors with one central repository that automates processes, and controls your data by reducing use of external tools.

## Case Study:

### Leading Financial Services Firm

A large financial services firm had millions of paper documents in an unmanaged file room at an office location. They engaged Zia Consulting to assist with digitizing these records, extracting and classifying the data, and automating the management of their growing amount of records going forward.

#### Technologies

- Alfresco DM/RM
- Intelligent Document Capture

#### Solution

- Easy Records Management
- Zia RMNow Training and Assessment Package

#### Results

- 100+ Years of Paper Records Digitized
- Application of Retention/Disposition Schedules
- New Records Directly Into RM
- Estimated ROI Over \$5 Million

### Automating Records Management:

- Enterprise Outlook Integration
- SharePoint and Office 365 Solutions
- Automated Classification and Filing
- Advanced BPM/Workflow
- Universal Content Security
- Integrated with ERP, CRM, and More



# RMNow: Training and Assessment Package



## Introducing RMNow

*Training and Assessment Package for  
Alfresco One with Records Management*

As one of the only Alfresco partners with substantial experience implementing this module, Zia is the leading provider of education and evaluation for Alfresco RM-related projects. RMNow is a custom 3-day program that includes two days of training and a 1-day assessment of your needs.

During training, an expert will work with up to 10 people from your organization (onsite or at our office) to suitably prepare them for administrative use of the module.

### Topics discussed during training sessions include:

- An Introduction to Records Management
- Setting Up a File Plan
- Disposition Schedules
- Filing Records
- Users and Security
- Filing Emails and Physical Records
- Records Search
- Vital Records
- Disposition Reprised
- Automating the File Plan
- Auditing
- Export/Import and Installation
- And More...

During the assessment, a project manager will evaluate your RM needs. They will review goals, determine business requirements, and review application and IT architecture. Upon finalizing this business and technical assessment, we'll build a project roadmap. This includes a project management and implementation plan, success criteria, and adoption matrix.

Zia provides you with all the tools and training necessary to successfully implement and sustain the Alfresco One with Records Management module. Work with the partner who has the most RM experience and the best training.

### Principles of Easy RM Solutions Include:

- In-Process Records Management
- Automated Declaration of Records
- Intelligent Rule-Based File Plan
- Single DM/RM Repository—  
DoD5015.02 Certified
- RM Anywhere with On-Premise,  
Cloud, and Hybrid Solutions
- Mobile Records Management  
Capabilities

### Easy RM Delivers Functionality Such as:

- Capture of Records
- Management of Records
- Federated Search
- eDiscovery
- Legal Holds
- Access Control and Content Security
- Disposition of Records

