



# HOW RECORDPOINT ENHANCES RECORDS MANAGEMENT IN SHAREPOINT

## MORE THAN SHAREPOINT

SharePoint out-of-the-box provides two mechanisms for managing records.

Records can be managed 'in place' (i.e. in the team-site in which they are created or captured), or records can be sent to a separate site(s) using a specific template known as a Records Centers.

*RecordPoint does not use SharePoint records management functions to manage the lifecycle of records.*

*This means the maintenance and training overhead required for setting up specific Records Centers, creating content organizers and rules, drop off libraries and send-to connections is eliminated.*

### CENTRALIZED RULES

RecordPoint uses a centralized rules engine to automatically apply appropriate disposal schedules and classification to records based on any combination of metadata, parent metadata, content type or location (e.g. site, library, list, document set or folder). These records are stored in place in the user facing SharePoint site by default and can then be archived to the RecordPoint archive over time.

### RECORDS CENTER

The RecordPoint archive is built from standard SharePoint Record Centers. RecordPoint automatically creates, scales and optimizes these Record Centers, into which records are archived transparently to both users and Records Managers.

*RecordPoint can capture and track records from the moment of creation, removing the reliance on the user to actively 'declare' the document a record.*

Movement of records into the RecordPoint Record

## FEATURE COMPARISON

	RECORDPOINT	SHAREPOINT
Easy to Use	✓	✓
Centralized Dashboard	✓	
Rules-based Automation	✓	
Hybrid Management Capability	✓	
Lifecycle Management	✓	
Secure Disposal	✓	
Records Permalinks	✓	
Rules Analyzer	✓	
Aggregations	✓	
Physical Records Management	✓	
Audit Capabilities	✓	
Compliance Certifications	✓	

RecordPoint is records management for on premises or hybrid environments. Built for SharePoint, RecordPoint is an enterprise grade solution that seamlessly integrates and extends the native record management capabilities of SharePoint enabling records compliance.

## COMPETENCIES

- 21 CFR Part 11
- ISO 15489
- ISO 16175
- ANSI
- FIPS 140-2
- HIPAA
- MoReq 2010
- NARA
- Sarbanes-Oxley
- VERS

Centers maintains complete integrity of metadata, including vital authoring information, permissions and versions..

All reporting and auditing is also available from a centralized Records Management console, and audit information includes all record keeping activities such as re-sentencing, and movement history for physical files.

*RecordPoint enables the capture of records without the need to move them in the SharePoint structure, whilst still providing a centralized interface for records managers to manage them, in essence.*

## AGGREGATION

RecordPoint allows for aggregation at any level within SharePoint.

Sites, Lists, Libraries, Document Sets, or Folders can be managed as aggregations (files).

External sources can also be managed within their own aggregations e.g. content from Twitter, Facebook, or Office365.

## UNIQUE IDENTIFIERS

RecordPoint generates unique identification for each object (aggregation - site, library, document set/folder, and document) based on a configurable numbering pattern.

Numbering is unique across an entire organization regardless of the number of farms or site collections.

## DELETION

*RecordPoint can be configured to prevent end users deleting documents from SharePoint, or, permit deletion, and send the document over to RecordPoint to be maintained as a formal record as part of the delete.*

RecordPoint allows end users to request deletion of specific records due to error or administrative requirements.

RecordPoint keeps the metadata of all deleted or destroyed objects.

## EXPORT

RecordPoint allows exported records to include all of their contextual metadata. The export functionality is fully configurable and compliant with well-known export standards.

RecordPoint allows records managers to update records metadata in bulk.

## DISPOSAL

RecordPoint includes comprehensive centralized disposal functionality. All records which are ready for disposal (including related or linked records) are automatically available for review by the Records Team. Approval for disposition can easily be delegated to the appropriate business managers responsible for the content if required. All disposition actions and approvals are recorded and auditable.

*No records are automatically destroyed, without the appropriate approval being provided.*

RecordPoint retention periods can be assigned trigger dates from any date within the system, including event driven dates such as project close, termination date, etc.

*The destruction process in RecordPoint can be configured to perform secure and unrecoverable destruction of records.*

All metadata can be retained after records have been destroyed.

## LONG TERM PRESERVATION

RecordPoint includes functionality to convert records into a long-term preservation format (e.g. VERS).

This format can be configured according to the requirements of the relevant national archive or receiving body.

## PHYSICAL/HYBRID RECORDS

RecordPoint includes comprehensive functionality to support the management of physical records. Physical records can be added individually or in bulk.

Boxes can be created and managed and physical files can be added to boxes.

RecordPoint includes provision for the management of requests, and movements.

*RecordPoint allows for aggregations to be managed as a hybrid file containing both physical and electronic records.*

Relationships between physical and electronic records can be created.

Physical records are included in the comprehensive disposal functionality of RecordPoint and are able to be managed in the same way as electronic records.



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