



# Mobius Records Management

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Information governance  
for electronic records



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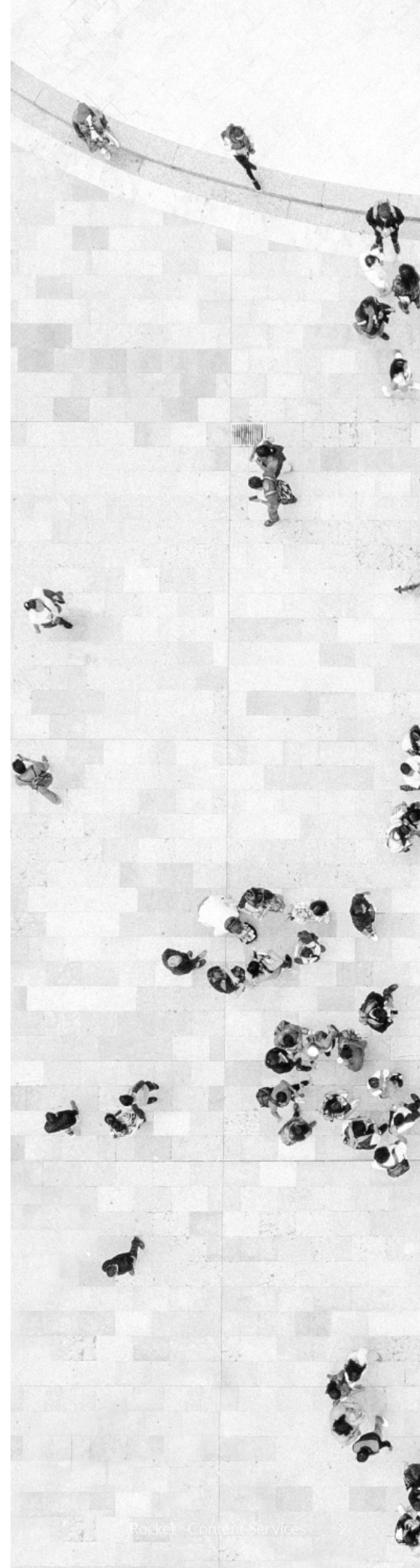
# Govern and manage critical business records

Records Management establishes policies, standards and procedures to provide comprehensive lifecycle management for all records, including high-volume machine-generated records and manages records in their original format. Time and event-based rules use workflow to automate operational processes (set new retentions, tag records for deletion, and change document categories) helping streamline exception processes and improve response time.

## Obtain a single view of electronic records

Records Management uses a Web Services-based user interface, designed for records managers. It serves as the central point of operations where a records manager can list corporate records, define and maintain corporate retention policies and manage event templates to automate tasks including:

- List all corporate record types regardless of format, creation date or location
- Define event templates and their parameters used by line-of-business applications to effect retention of individual or multiple records
- Define and maintain record retention policies using one or multiple disposition rules per policy



# Capture and classify records automatically

Records are created by business systems. They are typically disconnected from records management applications that define time and event-based record retention periods based on business activities such as customer onboarding, banking transactions, and insurance claims. Records Management enables single sign-on access to business systems to capture records and place them in predefined or dynamically generated folders. Metadata associated with records is used to identify retention policies, which is then used to determine record classification. This eliminates the need for traditional manual record “declaration” by:

- Automatically capturing invoices, utility bills, ATM transactions, etc.
- Systematically processing large volumes of scanned, paper-based information
- Consistently classifying, declaring, and retaining electronic information as records in predefined or dynamically created folders

# Search, browse, hold and preserve records

Line-of-business users have an integrated user interface for browsing and managing automated and predefined folder hierarchies. When combined with disposition automation, reporting, and searching, users have enhanced control and awareness surrounding the hold and disposition process. This enables users to:

- Suspend normal record disposition by setting holds on single and multiple documents
- Place and describe multiple holds on individual documents with identifying descriptions
- Automatically resume normal retention activities based on the assigned record retention policy after all holds are removed from a record
- Search, view, and navigate folder hierarchy to locate records

## Benefits

- Enhances corporate accountability by preserving records
- Provides a single view into business system records
- Reduces time and resources to manage electronic records
- Ensures regulatory compliance
- Minimizes risks associated with audit and litigation

## Key features

- Facilitates automatic acquisition, classification, retention and disposition of electronic information
- Manages native electronic records in place
- Enables definition of hierarchical taxonomies using predefined and automatic contextual-based folder classification
- Supports time-and business event-based retention
- Provides an intuitive, web-based user interface and strong administration functions

# Audit the records management process

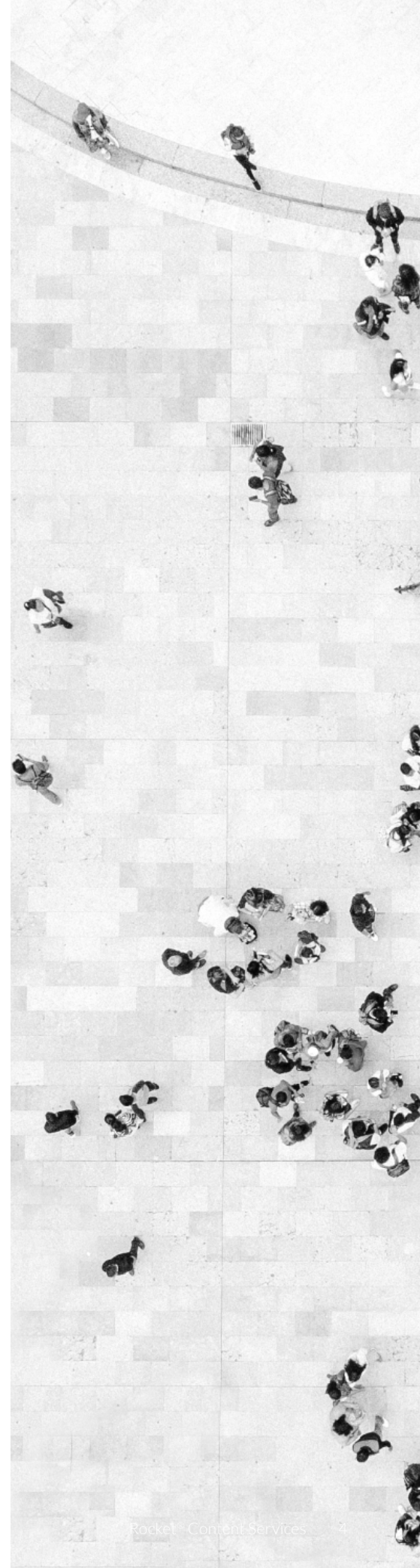
All activities in Records Management are tracked and logged. This ensures that all record changes, holds, and dispositions are documented and available in case of litigation or audit.

# Manage records with workflow

Records Management provides a visual workflow designer. With the drag and drop interface and visuals that match the business flow, users can quickly assemble embedded workflows to match the critical records management processes. Once deployed, Mobius workflow delivers content captured from business applications and systems in context with your work. Workflows can be monitored and rapidly modified to provide the agility you need to meet today's dynamic workplace.

# Flexible cloud hybrid deployment

Many large organizations operate in a technology environment that includes mainframe applications, distributed processing systems and cloud processing and storage. However, records management solutions often ignore this diverse environment and require organizations to sunset legacy systems or migrate records to a new environment to manage records. Wholesale replacement of business systems and content migration can be cost-prohibitive and disruptive. Rocket Software's Records Management solution can be deployed on-premises, in the cloud and in cloud-hybrid environments.



# About Rocket Software

Rocket Software partners with the largest Fortune 1000 organizations to solve their most complex IT challenges across Applications, Data and Infrastructure. Rocket Software brings customers from where they are in their modernization journey to where they want to be by architecting innovative solutions that deliver next-generation experiences. Over 10 million global IT and business professionals trust Rocket Software to deliver solutions that improve responsiveness to change and optimize workloads. Rocket Software enables organizations to modernize in place with a hybrid cloud strategy to protect investment, decrease risk and reduce time to value. Rocket Software is a privately held U.S. corporation headquartered in the Boston area with centers of excellence strategically located throughout North America, Europe, Asia and Australia. Rocket Software is a portfolio company of Bain Capital Private Equity. Follow Rocket Software on [LinkedIn](#) and [Twitter](#).

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