

# **Analytics and AI will Lead to True Records Management Automation**

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# Goals for today

- Automation technologies and their effect on records management
- Evaluation strategies when considering new records management solutions
- Strategies to prepare employees for the use of automation

# What is records management in the modern world?

According to AIIM, records management refers to a set of activities required for systematically controlling the creation, distribution, use, maintenance, and disposition of recorded information maintained as evidence of business activities and transactions.

Records management, also known as records and information management or RIM, is an organizational function devoted to the management of information in an organization throughout its life cycle, from the time of creation or inscription to its eventual disposition. This includes identifying, classifying, storing, securing, retrieving, tracking and destroying or permanently preserving records.



# What is records management in the modern world?

According to AIIM, records management refers to a set of activities required for systematically controlling the creation, distribution, use, maintenance, and disposition of recorded information maintained as evidence of business activities and transactions.



Records management (RM), also known as records and information management or RIM, is an organizational function devoted to the management of information in an organization throughout its life cycle, from the time of creation or inscription to its eventual disposition. This includes identifying, classifying, storing, securing, retrieving, tracking and destroying or permanently preserving records.



# Digital Assistance

- Half of modern enterprises will be on Windows 10 by 2018
- Google and Microsoft cloud office services continue to grow in popularity
- Google and Microsoft provide toolsets for developers to intergrade their applications



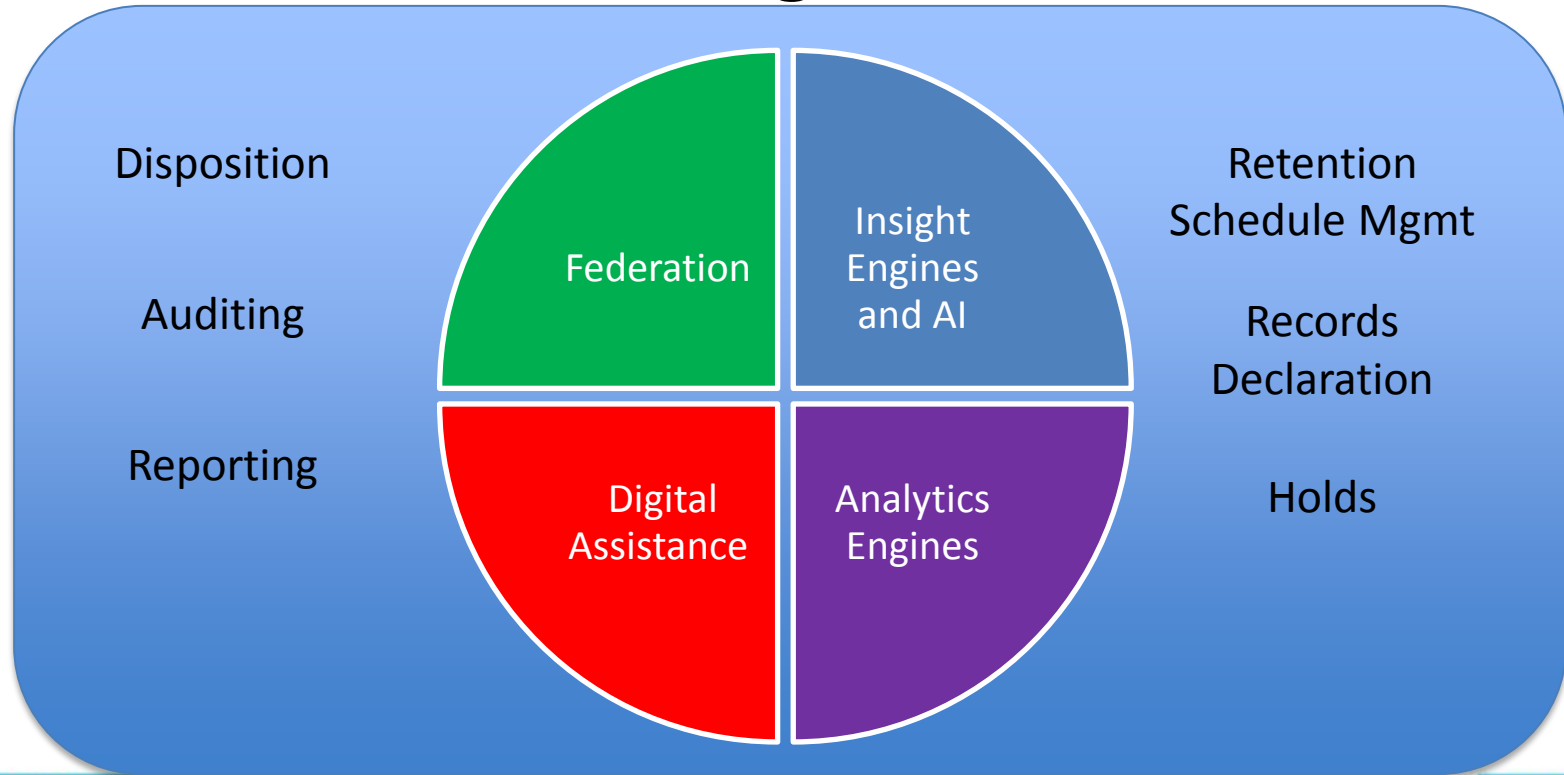
# The Future is Not Now, BUT IT IS COMING!

By YE20, 80% of content declared as records will be done so automatically via graphing technology and analytics.

Gartner Research:

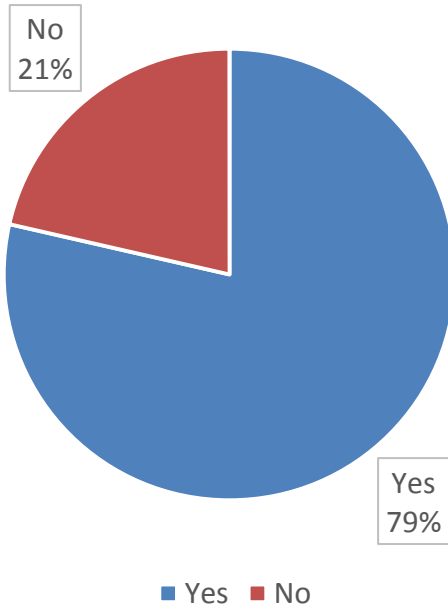
*Predicts 2017: Automating and Improving Workers' Content Interactions and Experiences*

# Evolution of Technologies for Records Management

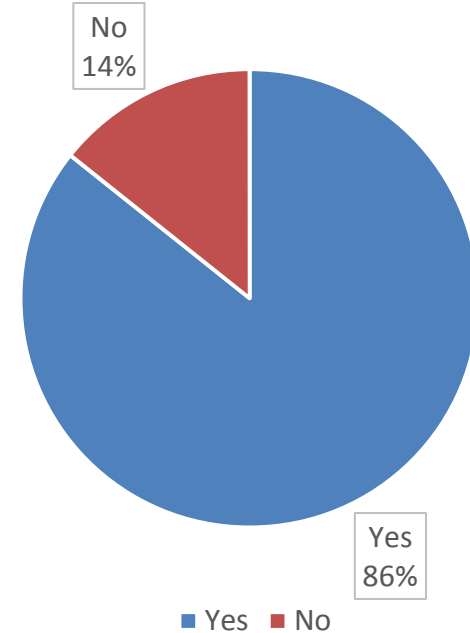


# The New Technologies

## Insight and Artificial Intelligence



## Content Analytics Engine





# The Underlying Technology



## Fingerprint Technology

- Identify as related or similar content
- Determine the right record series based on document layout



## Machine Learning

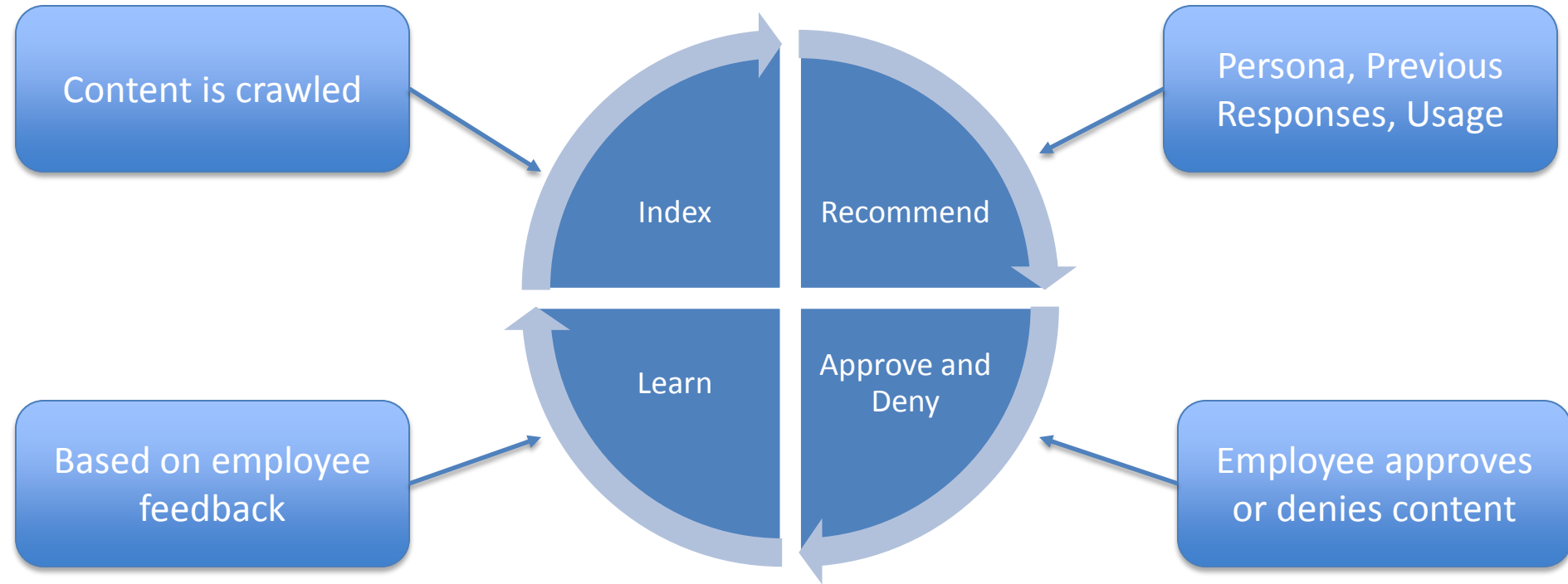
- Based employee's persona and previous interactions
- Extracting from pre-existing content



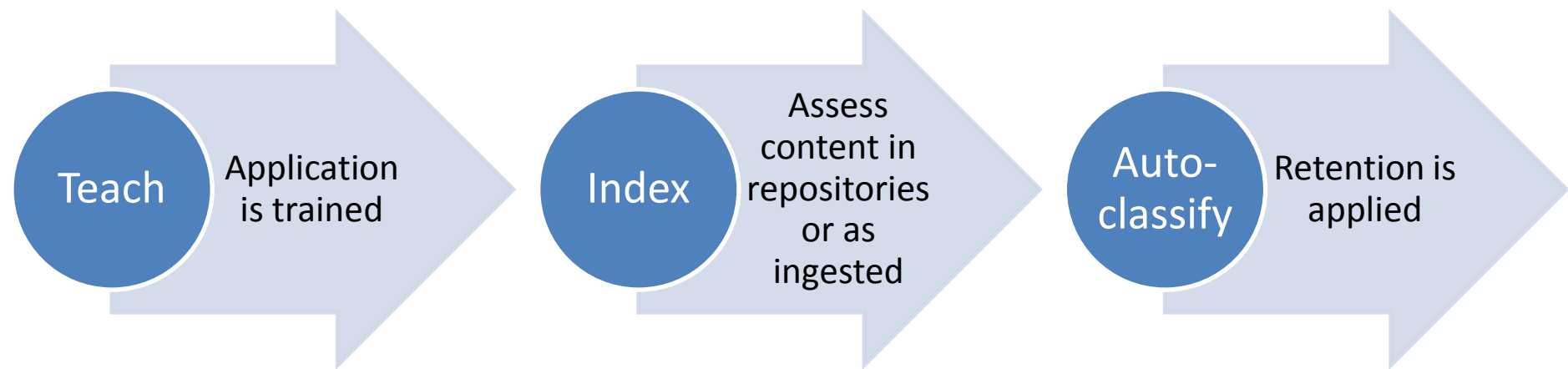
## Training

- Use example or sample document and rules/policies
- Train through extracting data from content.

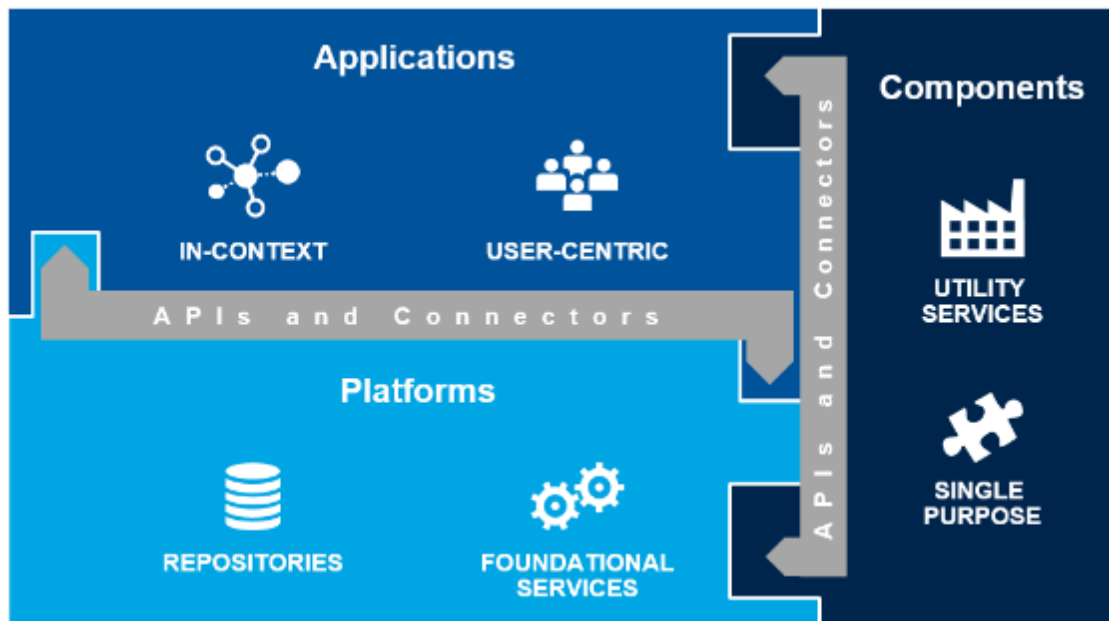
# Scenario 1: Insight (Learning)



## Scenario 2: Auto Classification (Teaching)

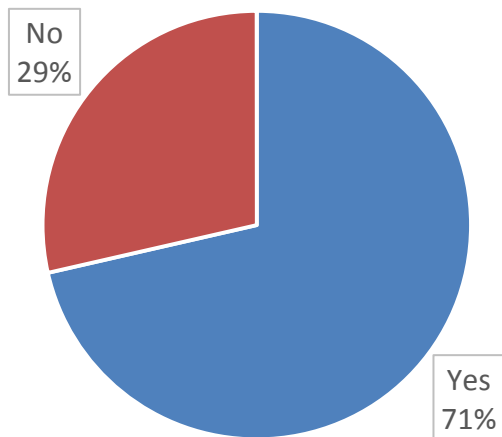


# Federation

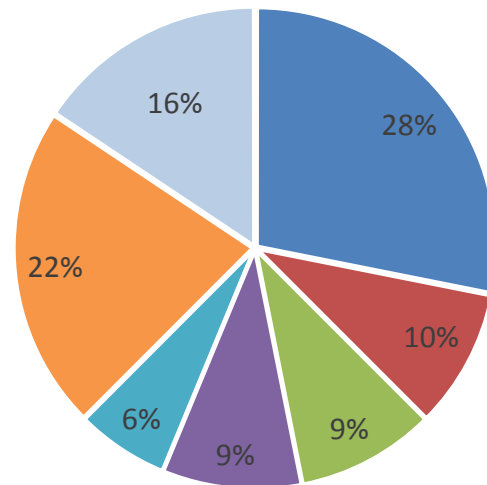


# Federation

Does your platform provide integrations that allows retention, disposal, and records management control to be applied to data in other repositories from your platform?



■ Yes ■ No



■ Office 365 ■ G Suite ■ Box ■ Dropbox  
■ Slack ■ SAP ■ SalesForce

# Assessing Records Management Tools



Core records management functions have  
reached their maturity plateau

# Assessing Records Management Tools

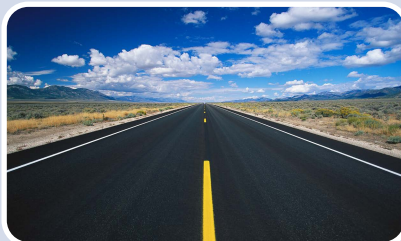


Who is being innovative?

# Assessing Records Management Tools



Finger Printing  
Technology  
Machine Learning  
Intelligently  
Assigning



Vision  
Available Functions  
and Technology  
Future Release  
Timing



Partnerships  
Out of Box  
Integrations  
API  
CMIS



Experience level  
Current Client  
References  
Ground Up  
Development or  
Through Acquisition



# Preparing Business Employees Automation Perspective

*“Most users won't accept a “magic” system where they do not understand why a document is classified into a certain category”*

SER Group

Gartner Records Management Automation Survey

January, 2017

# Preparing Business Employees

## The Automation Perspective

Automation maturity must happen holistically and not through the lens of records management

Key considerations	Description
Assess Organization and Skills	Business and IT employees understanding
Assess Workflow IQ	Effectiveness of creating workflows
Standardization	Standardizing IT software, hardware and policy
Objective and expectations	Be realistic with automation projects
Value and Benefit	Reliability, response time, human labor required

# Preparing Business Employees Records Management Perspective



Training



Training



Training

# Action Plan

- ❑ Evaluate current automation usage
- ❑ Evaluate current records management maturity
- ❑ Evaluate current RM applications automation tech
- ❑ Create awareness program where needed
- ❑ Establish a short and long term roadmap

# — HOW TO REACH ME

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The background of the entire image is a dense, repeating pattern of tropical leaves, including palm fronds and monstera leaves, in various shades of teal and dark blue. In the center, there is a white rectangular box containing the text.

— **THANK YOU** —

#AIIM17