

SYNERGIZE Records Management

Govern records through their lifecycles with efficiency, ensure the integrity of records and achieve alignment with regulatory requirements

RECORDS MANAGEMENT

Records management, or RM, is the practice of identifying, classifying, archiving, preserving, and destroying records.

Practicing Records Management Involves:

- Creating, approving, and enforcing records policies, including a classification system and a records retention policy
- Developing a records storage plan, including the short and long-term housing of physical records and digital information
- Identifying existing and newly created records, classifying them, and then storing them according to standard operating procedures
- Coordinating access and circulation of records within and even outside of an organization
- Executing a retention policy to archive and destroy records according to operational needs, operating procedures, statutes, and regulations

Microdea's Records Management module extends the Synergize Document Management System, enabling organizations to track and manage electronic records through their entire lifecycle, from creation (or receipt), to maintenance and use, to cutoff and finally disposition (destruction or transfer).

Maintaining the integrity, tracking the chain of custody, and managing the retention and destruction of records is a high priority for many organizations in today's economic environment.

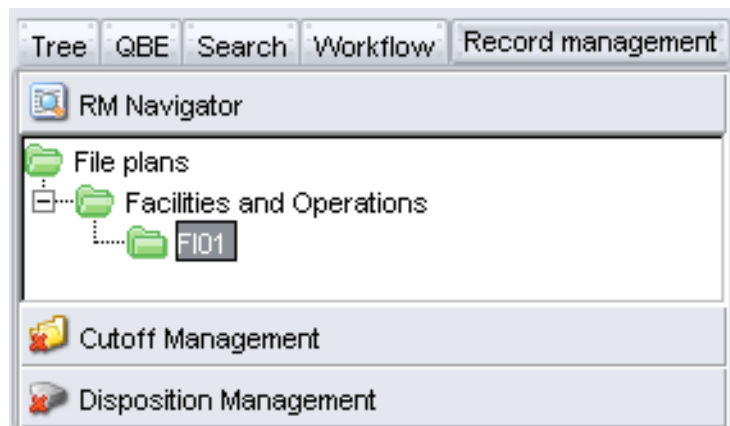
With the Synergize Records Management module, organizations are able to easily access records from a central repository with the necessary security and auditing capabilities to meet governance and regulatory requirements.

All records are stored in a secure, collaborative system and are easily retrievable by certified users through Synergize's web-based design.

By retrieving records quickly and reliably, employees are able to increase their productivity. Sharing information across organizations is made easier, which helps improve decision making and advance business initiatives.

Synergize actively supports the practices of record identification, classification, archiving, retrieval, retention, and destruction.

Figure 1: The RM Navigator pane allows users to browse the available categories and folders within the file plan



TRAINING

Microdea's professionally designed and presented courseware provides hands-on training to smoothly advance users from conceptual understanding to practical skill set, enabling you to more quickly realize the business benefits of your Synergize investment.

TECHNICAL SUPPORT

Microdea's Support and Upgrade Assurance (SUA) contract provides access to our in-house technical resources and to the latest developments in imaging technology. Clients with SUA contracts are entitled to the latest version of Synergize at no additional cost.

ABOUT MICRODEA

As developers of the innovative Synergize Document Automation Solution, Microdea provides clients with advanced document, workflow and process management technologies. This cost-effectively automates and streamlines their paper-intensive business processes.

For more information on any of our products or services please visit us on the Web at: www.microdea.com

Microdea Inc.

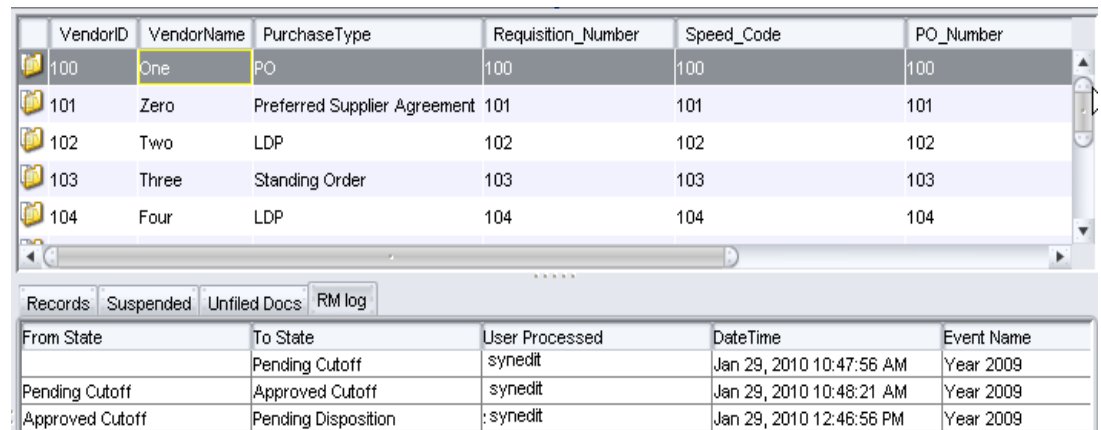
15 Wertheim Ct., Ste 301
Richmond Hill, ON L4B 3H7
Phn 905.881.6071
Fax 905.881.5943

The end-to-end solution facilitates effective file plan management. Recordkeeping is simplified as organizations are able to reduce risk and support compliance by achieving complete control of their records and vital business information.

The flexibility and scalability of Synergize adapts to the changing needs of any organization. As numbers of records increase and regulations evolve, Synergize's configurability can address these issues, thereby providing a consistent and long term solution.

Records managers are given the specialized security and auditing functionalities they require to ensure all critical information is handled in accordance with corporate regulations. The Synergize Records Management module enables organizations to accurately and efficiently govern records through their lifecycles, ensuring the integrity of records and achieving alignment with regulatory compliance obligations.

Figure 2: The Records Management RM Log tracks the RM folder lifecycle by logging each event along the way



VendorID	VendorName	PurchaseType	Requisition_Number	Speed_Code	PO_Number
100	One	PO	100	100	100
101	Zero	Preferred Supplier Agreement	101	101	101
102	Two	LDP	102	102	102
103	Three	Standing Order	103	103	103
104	Four	LDP	104	104	104

From State	To State	User Processed	DateTime	Event Name
	Pending Cutoff	synedit	Jan 29, 2010 10:47:56 AM	Year 2009
Pending Cutoff	Approved Cutoff	synedit	Jan 29, 2010 10:48:21 AM	Year 2009
Approved Cutoff	Pending Disposition	synedit	Jan 29, 2010 12:46:56 PM	Year 2009

The Synergize Records Management module provides:

- A concrete corporate governance system for records management
- Secure storage of records in a central repository with easy access and search/request capabilities for certified users
- Effective management of records through their entire lifecycle
- Assurance of compliance with regulatory mandates
- Reliable application of records management that is unobtrusive to IT environments and business practices
- Controlled document retention so records can be automatically retained by creation date, scan date, document type and scheduled date for deletion
- Information privacy security to reduce potential legal liabilities and exposure
- Auditing capabilities to track records and ensure proper management

For more information about how Microdea's Synergize Records Management Module can help your organization effectively manage records throughout their entire lifecycle and achieve compliance with regulatory mandates, contact us at 905.881.6071 ext 244 or marketing@microdea.com