



CASSIA
CONTENT MANAGEMENT



OPENTEXT™ Partner
TECHNOLOGY

Records Disposition Approval (RDA) Module

For customers who want a simple, intuitive, and flexible method to perform record disposition approvals.

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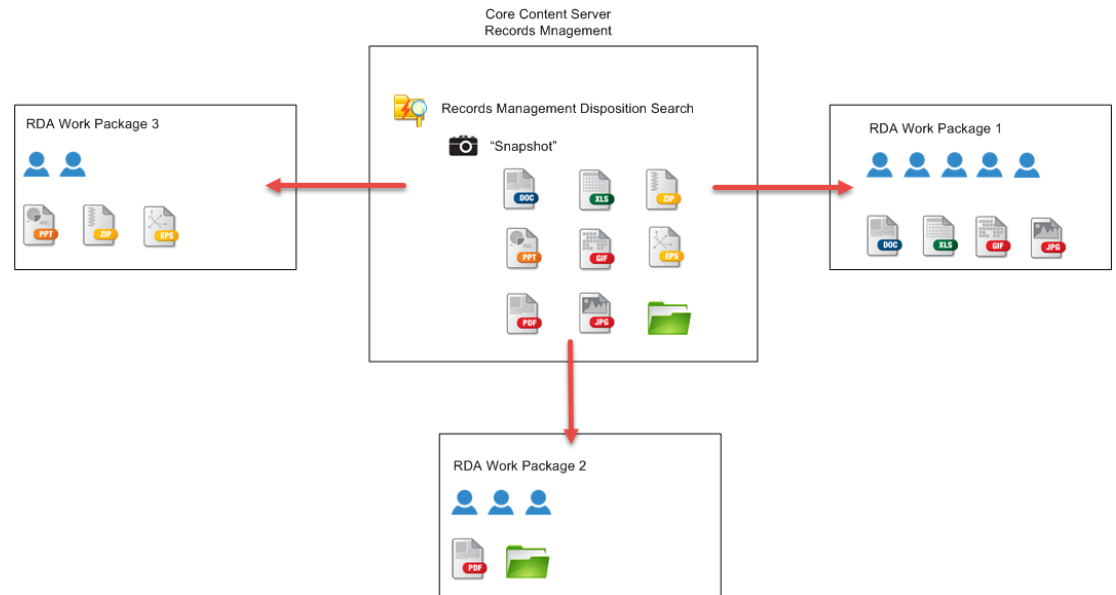
Some Common Challenges of Disposition Approvals

- Sending out the correct records to the appropriate approvers
- Getting people to do them!
- Taking action on the records once people have completed their review



Sending out the correct records to the appropriate approvers

- Use a single Disposition Search to create multiple RDA packages
- Use facets (metadata) and filters to help create the packages





Getting people to do them!

- The easier and more efficient you make it for users to review the records, more likely they will perform the disposition review
 - Ability to request feed back from other users
 - Use facets and filters to bulk approve/reject records
 - The “Consolidated view” allows users to see all pertinent metadata
 - Customers report users only needing **20 minutes** of training to use RDA!

Pending Items (5)

Approve for Destruction (0)

Reject (0)

Feedback Requests (0)

Content Filter

Application

[Microsoft Excel \(1\)](#)
[Microsoft Powerpoint \(1\)](#)
[Microsoft Visio \(1\)](#)
[Microsoft Word \(1\)](#)

Document Type

[Office \(4\)](#)
[Images \(1\)](#)

Approve for Destruction

Reject

Request Feedback

<input type="checkbox"/>	Type	Name ▲	Previous Approval	Unique ID	RM
<input type="checkbox"/>		Project 2010 Test Diagram.vsd			OPS-
<input type="checkbox"/>		Project 2010 Test Document.docx			OPS-
<input type="checkbox"/>		Project 2010 Test PowerPoint.pptx			OPS-
<input type="checkbox"/>		Project 2010 Test Publication.pub			OPS-
<input type="checkbox"/>		Project 2010 Test Spreadsheet.xlsx			OPS-



Taking action on the records once people have completed their review!

- No need to add records to Collections, or Accessions, or try to locate them with searches. With RDA you can take action on the records directly from the RDA interface!

Approved (9) Rejected (11) Excluded Items (53)				
Actions... Go				
Actions... Update Records Management Metadata Update Physical Item Metadata Apply Hold Remove Hold				
<input checked="" type="checkbox"/>	Folder 17	20140042	Fixed Date	ACT 11/04/2014
<input checked="" type="checkbox"/>	Folder 17	20140068	Fixed Date	ACT 11/04/2014
<input checked="" type="checkbox"/>	Folder 18	20140043	Fixed Date	ACT 11/04/2014
<input checked="" type="checkbox"/>	Folder 18	20140069	Fixed Date	ACT 11/04/2014
<input checked="" type="checkbox"/>	Folder 19	20140044	Fixed Date	ACT 11/04/2014
<input checked="" type="checkbox"/>	Folder 19	20140070	Fixed Date	ACT 11/04/2014
<input checked="" type="checkbox"/>	Folder 19	20140045	Fixed Date	ACT 11/04/2014



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Live Demo 

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Many More RDA Features

- Recall RDAs
- Force Approvals
- Reassign Approvers
- Conditional Approvers for High Risk Records
- Default Approvers
- Reporting Framework
- Granting of temporary permissions to Approvers
- Customizable Email notifications
- Customize approve/reject buttons
- Audit Report



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*Come visit us at Enterprise World 2015 in Las Vegas
Where we'll be launching two new products:*

- *RM Deletion Workflow Extensions*
- *Transitory Record Notifications for RDA*

thank you!

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