

Overview

RM4ED from Records Transformation Ltd. is a new product being launched at BET2020. As the core of RM4ED is a world class, mature Records Management system (EDRMS) that is in used world-wide.

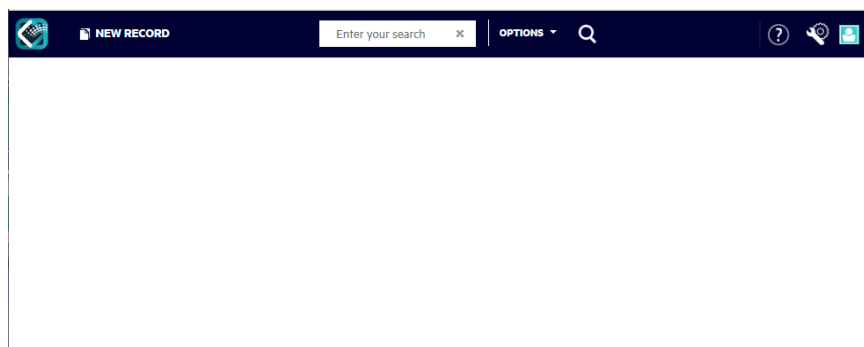
Normally the **EDRMS** is delivered as a costly server and desktop client environment.

The team at Records Transformation have developed this complex environment into a simple cloud-based “**Software as a Service**” (**SaaS**) solution whilst still maintaining the feature rich functionality offered by the **EDRMS**.

The team at Records Transformation have extensive experience in Records Management and many years’ experience in all aspects of the EDRMS and used this experience to develop a simplified web interface that gives the everyday and occasional user all they need to have to upload, search for and view records.

RM4ED SaaS offers two user interfaces:

Web User

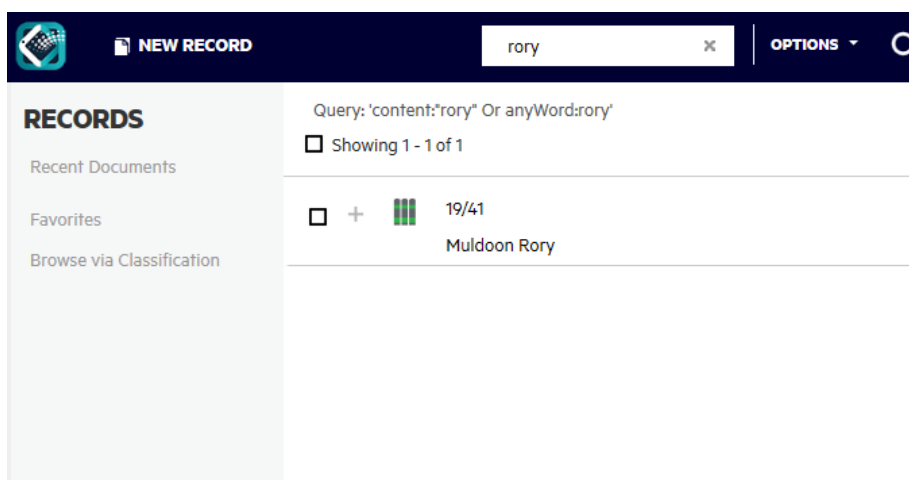


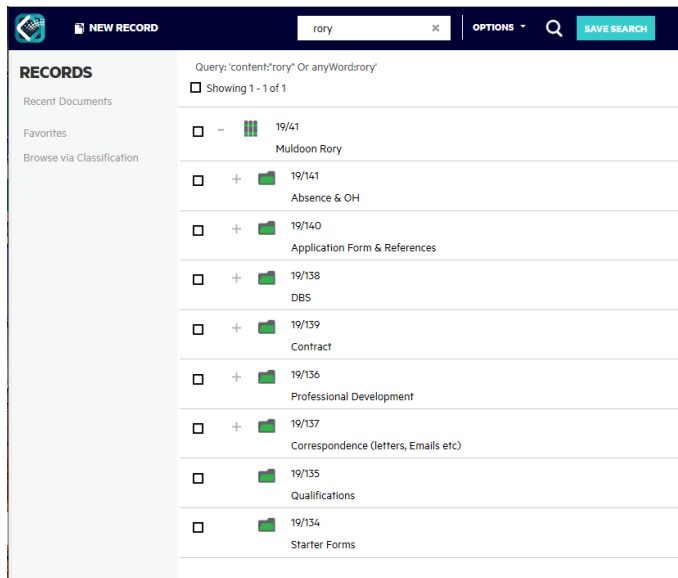
The Web User interface is a simple web page that allows for:

1. uploading records to a pre-defined folder structure
2. searching for records.

It has been developed for the everyday / occasional user whose main interaction with the EDRMS is encapsulated within those two tasks.

A search term, “Rory” is entered into the dialog box and on entry, all records with the words “Rory” are returned. Not only is the word searched for in the title of the records but also in the content of the records. In this example, one record has been found, in this instance it’s a prime folder (a folder containing sub-folders).





The prime folder titled “Muldoon Rory” has a pre-defined set of sub-folders. In this instance, the prime is an “HR” folder designed for uploading the different record-types associated with a member of staff.

On creating a new HR prime folder for a member of staff, the list of sub-folders is created automatically. Also, on creating a new primary, a retention / disposal schedule is automatically assigned to the folder.

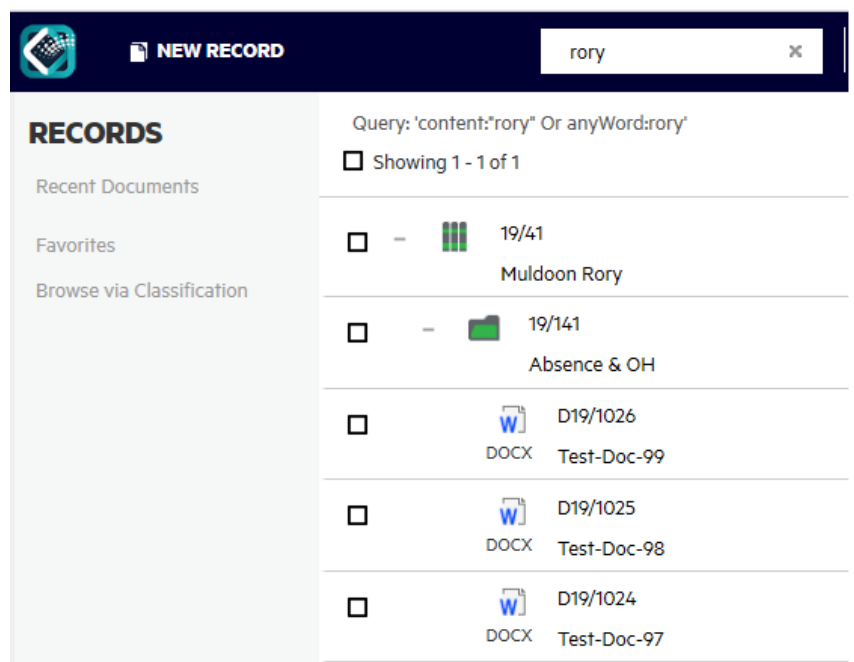
The individual sub-folders can also have individual retention / disposal schedules automatically assigned to them.

The list of records found under the “Absence & OH” folder is shown [right].

This is the complete complexity of the structure which is:

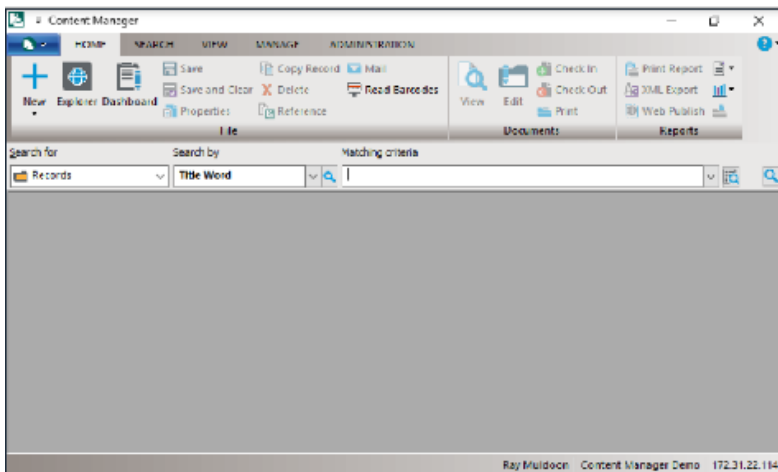
1. A prime folder for the member of staff
2. An automatically created list of pre-defined sub folders
3. A collection of sub-folder categorised documents concerning the member of staff

Note: The records shown in this example are all MS Word documents; however, any form of document, picture, spreadsheet, etc. file can be



Note: The examples shown above are based around HR records, but the same simple structure applies to “Pupil” records as well. The only differences would be in the metadata associated with the prime folder and the titles and quantities of the sub-folders. Also, different retention / disposal schedules will apply. However, as they are automatically applied, the user does not have to be concerned with them.

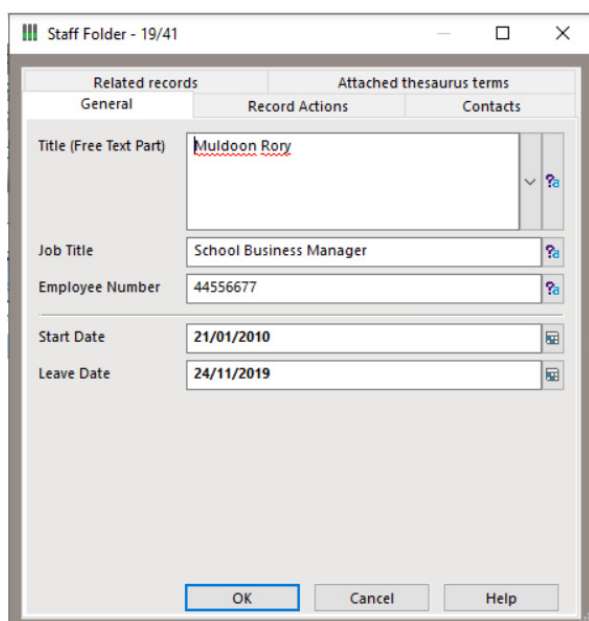
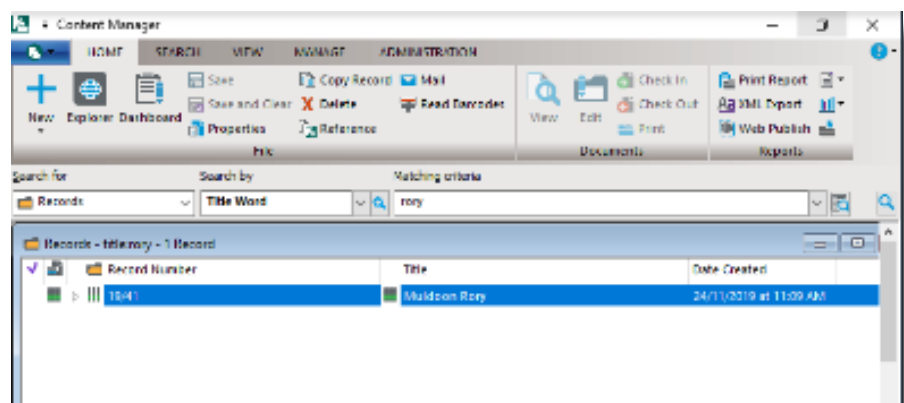
Web Client



The Web Client offers the feature rich environment that the records managers / nominated staff within the school would use, for example, when creating new pupil folders, adding new retention schedules, etc.

The Web Client can also be used in a simillare manner as the Web User interface.

The searching here is slightly different as in the example I have searched for a "Title Word - Rory". As before, one record is found matching the search criteria.

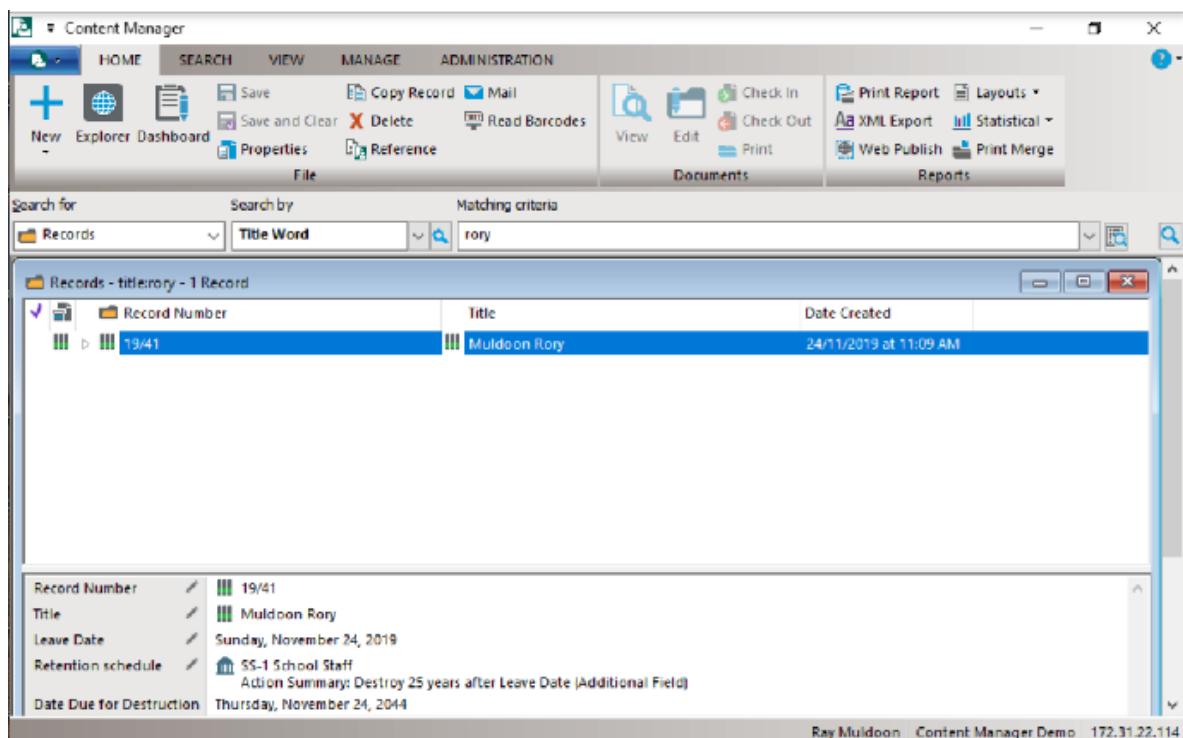


Each prime folder has a set of metadata that is used to identify, in this case, a member of staff. This metadata includes the "Leave Date" of the person.

Retention / Disposal of Records

The users of **RM4ED** with a school do not have to be concerned about the GDRPR requirements in regards to the retention and finally, the disposal of the records. This task is controlled by the Retention Schedule which is built into the records they create. As soon as they create a prime folder and content, **RM4ED** monitors the records through their lifecycle. This includes the creation of a comprehensive Audit Log that details all activities carried out on a record, such as:

1. Who has viewed it
2. Who has edited it
3. Who has copied it
4. etc.



As this member of staff has a "Leave Date entered into the metadata form for their prime record, the retention / disposal schedule has been automatically triggered - see "Date Due for Destruction" in the screenshot above.



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