

# Introduction to Records and Information Management

To meet legal and organizational requirements, an organization must store information for specific time periods and protect it from unauthorized access. Records include documents, e-mail messages, videos, instant messages, Web pages, and more. The legal department in an organization usually manages which records must be retained, for how long, and who has access to them. For example, the Adventure Works Legal department and IT department worked together to ensure the required records, such as contracts, are secure and retained for the necessary time periods.

**NOTE** Records Center sites and information management policies require the Microsoft Office SharePoint Server 2007 Enterprise client license.

The records management capabilities in Office SharePoint Server 2007 can help an organization to consolidate diverse content from multiple file shares and personal drives into a centrally managed repository, known as a Records Center site. For example, the Adventure Works Legal department consolidates and categorizes records on the **Lease and License Records** site as contracts, leases, and license agreements. Integrated search capabilities help people find and share this information. The content in a Records Center site can be protected from unauthorized access.

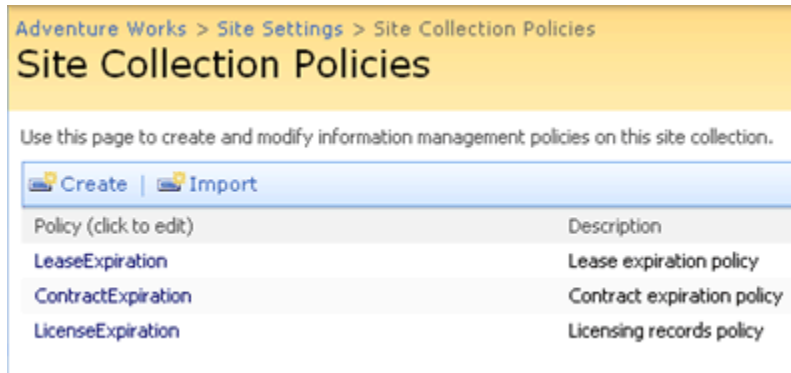
The screenshot shows a SharePoint site titled "Adventure Works > Legal > Lease and License Records". Below the title, there is a description: "Use this site for archiving licensing records." The main content area is titled "Records Center" and contains a sub-site "Licensing Records Center" created by Alex Roland on 9/6/2007 at 6:00 PM. Below this, there is a link to "Add new announcement".

Below the announcement link is a "Record Routing" section with a table. The table has columns for Title, Description, Location, Aliases, and Default. It lists three record types: Leases, Contracts, and License Agreements.

Title	Description	Location	Aliases	Default
Leases	Leases and other records related to lease agreements	Leases		No
Contracts	Records for contracts, such as vendor contracts and sales contracts.	Contracts		No
License Agreements	Records of license agreements, agreement amendments, and other licensing documents.	License Agreements		No

The records management capabilities in Office SharePoint Server 2007 can help your organization to store and protect business records in their final state for auditing and legal purposes. You can apply site collection policies to these records to ensure that the records are retained for the required time period to comply with legal requirements or organizational needs, thereby mitigating legal risk to your organization. For example, Adventure Works retains

contracts for three years after they expire. Audit logs provide proof to internal and external auditors that records have been retained appropriately. Holds can be placed on specific records under legal discovery to prevent their deletion.



The screenshot shows the 'Site Collection Policies' page in SharePoint. The breadcrumb trail is 'Adventure Works > Site Settings > Site Collection Policies'. The page title is 'Site Collection Policies'. Below the title, there is a description: 'Use this page to create and modify information management policies on this site collection.' There are two buttons: 'Create' and 'Import'. Below these buttons is a table with two columns: 'Policy (click to edit)' and 'Description'.

Policy (click to edit)	Description
<a href="#">LeaseExpiration</a>	Lease expiration policy
<a href="#">ContractExpiration</a>	Contract expiration policy
<a href="#">LicenseExpiration</a>	Licensing records policy

SharePoint Server integrates records management capabilities with collaboration features, such as workflow, to help people work together to create, review, and approve documents in a more structured way. People no longer have to rely solely on e-mail to share documents. Mobile workers can also use these documents when they are not connected to the network. SharePoint Server integrates with other familiar Microsoft Office products, such as Microsoft Word 2007, to make collaboration and records management features available to everyone in your organization.