

Auto-Classification— Enablement Workshops

Strengthen information governance strategies and establish a highly defensible records management program



Reduce litigation risk and eDiscovery and storage costs

Improve compliance, security and user productivity

Save time by classifying huge volumes of legacy content, email and social media

How can organizations and information management professionals overcome the challenges of manual content classification? The answer is OpenText™ Auto-Classification—a solution that provides automatic identification, classification, retrieval and, ultimately, archival and disposal capabilities for electronic business records and transient records as policy dictates.

Content classification is needed in order to understand and determine why and how long content must be retained and when it can be discarded or disposed. To assist customers in transitioning their classification process from an intensive, manual operation to one that is automated and efficient, OpenText Professional Services provides a two-part workshop to help information management professionals establish a successful auto-classification program. Part one is designed to get you started with a workshop focused on understanding the Auto-Classification technology. Part two offers hands-on training to establish and refine auto-classification processes.

The Getting Started workshop will explore:

- The benefits of a classification program
- Auto-Classification functionality
- What to expect from Auto-Classification
- The science behind Auto-Classification
- Machine learning
- Similarity
- How Auto-Classification interacts with Content Server
- Creating a classification model
- Strategies for model optimization
- Measuring quality
- Identifying issues and taking action
- Creating rules
- Reviewing collections
- Classification job vs. ongoing classification
- Preparing an OTAC project
- Key elements for implementation

The Working with Models workshop will explore:

- The science behind Auto-Classification: A refresher
- The relation between Auto-Classification and Content Server
- Auto-Classification workflows
- Evaluating and modifying your classifications: Some pointers
- Model creation approaches
- Model optimization best practices
- Understanding and using dashboards
- Reasoning about precision and recall
- Keeping track of actions and effects
- Rules: When and how to use them
- Measuring accuracy
- Different approaches to review collections
- Classifying content

Part 1: OTAC Getting Started workshop

During this two-day workshop, OpenText delivers a technical deep dive of the Auto-Classification (OTAC) module for OpenText™ Content Server and best practices for implementing OTAC. Our consultants will provide you with the tools to define and plan an auto-classification strategy, as well as some exercises to test your understanding of the science and process behind auto-classification.

The target audience for this workshop is auto-classification managers, auto-classification reviewers, litigation support staff, records managers, library and information scientists, machine learning experts, linguists and any stake holders involved in the project.

At the end of the workshop, you will know how to plan a successful implementation and have clear expectations of how the solution will benefit your organization.

Part 2: OTAC Working with Models

This four-day workshop seeks to lead you on your way to a defensible and automated information governance strategy. This onsite workshop offers hands-on experience with OTAC and your own content, classifications and system.

The intended audience for these sessions are the main users of OTAC, as well as the stakeholders: auto-classification managers, auto-classification reviewers, litigation support staff, records managers, library and information scientists, machine learning experts and linguists.

As a prerequisite, participants for this workshop should have participated in the Getting Started workshop, been involved in the steps leading to the creation of the classification and contributed to gathering the exemplar documents required for this part.

At the end of this workshop, you will have a high degree of confidence that the automated classifications provided by OTAC match your manual processes. You will also know how to create classification models and optimize according to best practices, understand how to assess and resolve accuracy issues encountered in the optimization process and create pre-classification and classification rules and assess their performance.

With these workshops, you will learn how Auto-Classification classifies content based on an understanding of the content itself, rules or a combination of both. We will address its critical value for low touch and high-volume content as a defensible and transparent approach to retention and disposition. We will also discuss paradigms and paradoxes such as:

Information Governance Paradigm Shift



Class Setting	Fees	Includes
Your facility–Part 1 & Part 2	\$32,475 USD	<ul style="list-style-type: none">• Field instructor• Excludes: Travel and expenses• Maximum: 8 participants
Your facility–Part 1	\$12,475 USD	<ul style="list-style-type: none">• Field instructor• Excludes: Travel and expenses• Maximum: 8 participants
Your facility–Part 2	\$24,975 USD	<ul style="list-style-type: none">• Field instructor• Excludes: Travel and expenses• Maximum: 8 participants

[Learn more](#)

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To start realizing the benefits of Auto-Classification, you can engage in a workshop now.

Sign up today by calling +1 (877) 678-3461 (North America Toll Free), +1 (514) 448-0948 (Montreal and Toll Number) or by emailing PortfolioAnalyticsPS@opentext.com.

About OpenText

OpenText, The Information Company, enables organizations to gain insight through market leading information management solutions, on-premises or in the cloud. For more information about OpenText (NASDAQ: OTEX, TSX: OTEX) visit: opentext.com.

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