

Modernizing Records Management in the era of AI

BY: HEMANT PRASAD



Traditional Approach to Records Management



RECORDS MANAGEMENT SYSTEM

Identify Records Types

Records Administration and Control

Records retention and Archival

Capture / Digitization Process

Records Dissemination

Records Disposition



Challenges

With traditional Records Management

From massive information growth to AI-generated fake content to records sprawl in multiple systems.

Traditional OCR is
unreliable



Because the error rates in Scanning and OCR are too high, it still consumes significant human efforts to keep correcting OCR errors.

Finding information is
tough



Because searching and finding information across records silos and then manually collating it time consuming.

Records Authenticity is
questionable

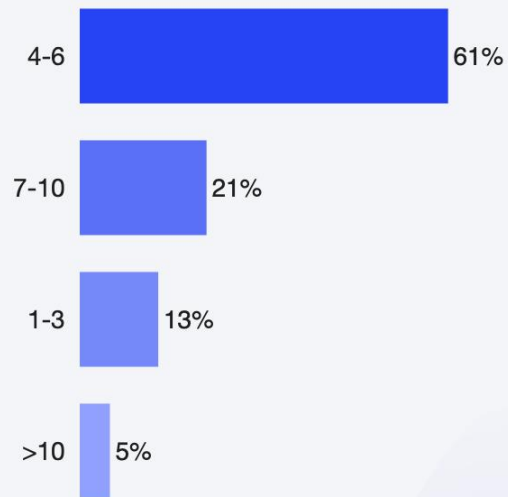


Because AI can generate information identical (or sometime better) than genuine records.

..and there is more

Market Survey in Gartner Community

How many unstructured data (documents) silo does your organization have?



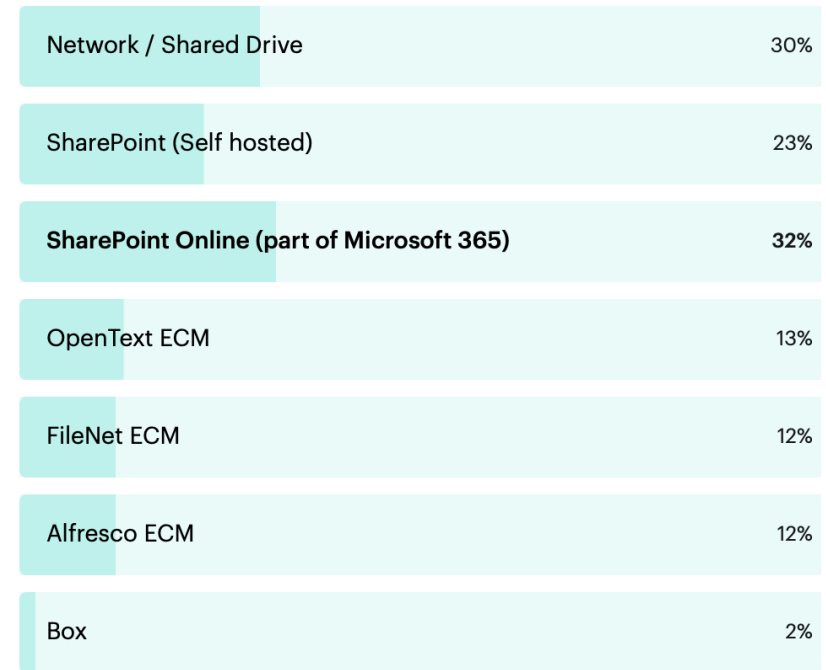
N = 56 Community Members

Gartner Peer Community

Survey participants: Globally Participants

CIO (46%), Director (41), VP (13%).

Which are the most common documents repositories in your organization (select all that apply) ?

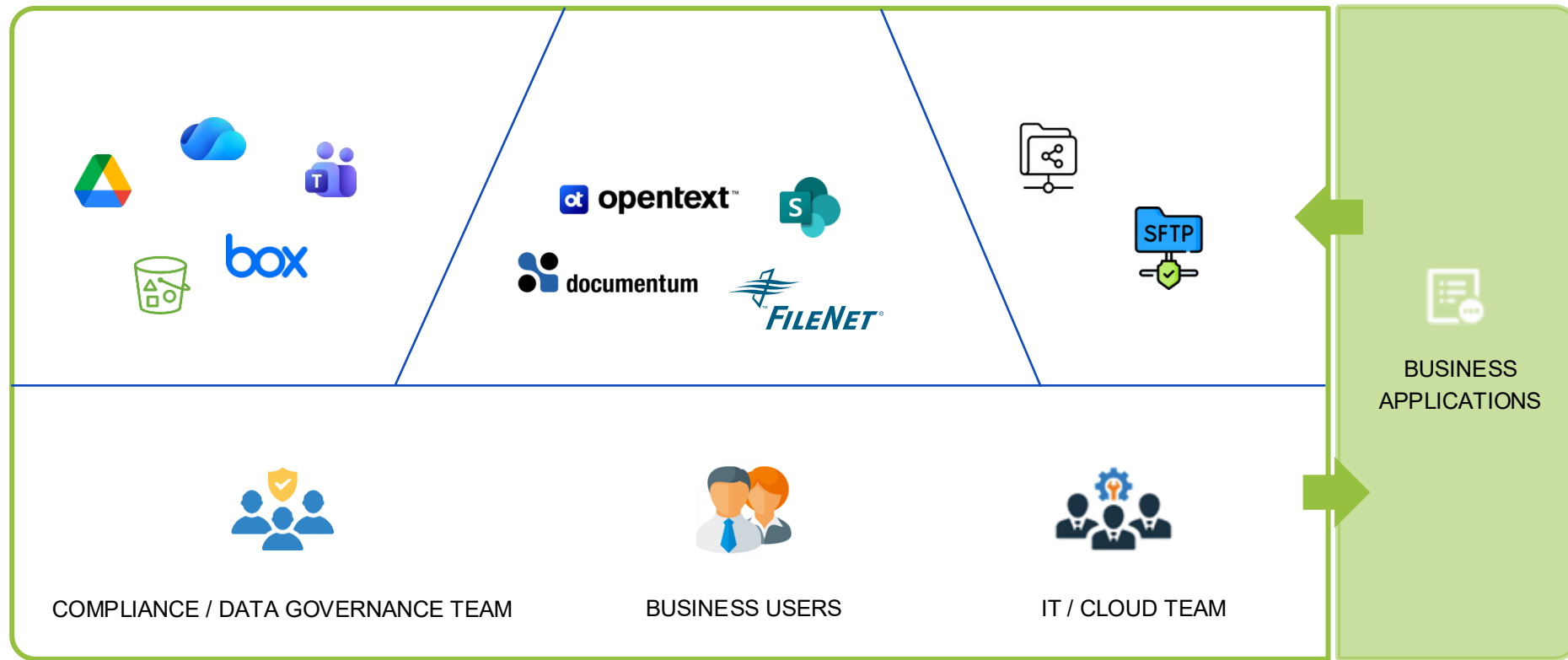


- Software (26)
- Hospitality (9)
- Construction (17)
- Real Estate, Rental and Leasing (10)
- Transportation and Warehousing (10)
- Consumer Goods (23)
- Finance, Banking & Insurance (22)
- Arts, Entertainment and Recreation (10)
- Educational Services (17)
- Utilities (17)
- Government (1)
- Manufacturing (19)
- Health Care and Social Assistance (22)
- Hardware (12)
- Retail (17)
- Telecommunication Services (17)
- Agriculture, Forestry, Fishing and Hunting (9)
- Biotech and Scientific R&D (2)
- Professional Services (33)
- Other Services (except Public Administration) (2)

Records Landscape

Records Live Everywhere

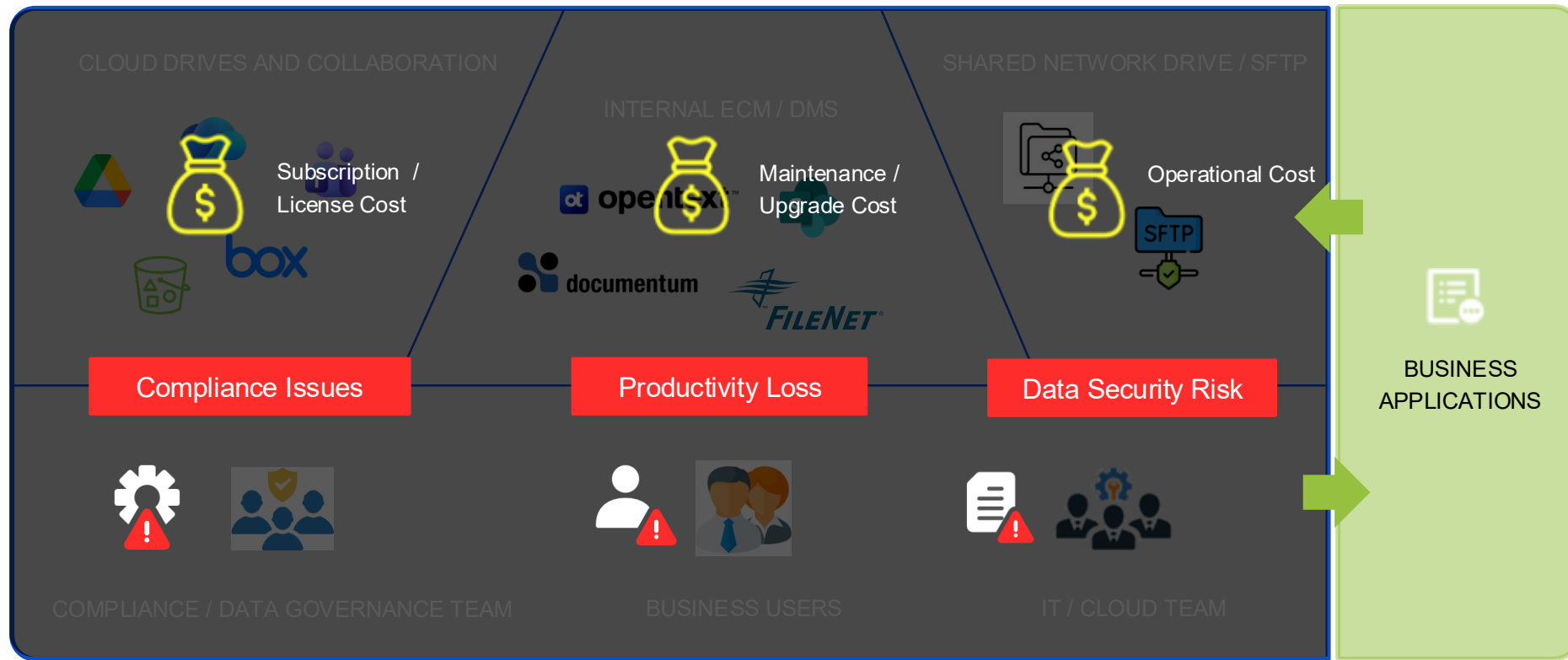
6-8+ Typical records silos across ECM, DMS, M365, cloud drives, file shares, FTP and legacy apps



Records Manager's Nightmare

Control Lives Nowhere

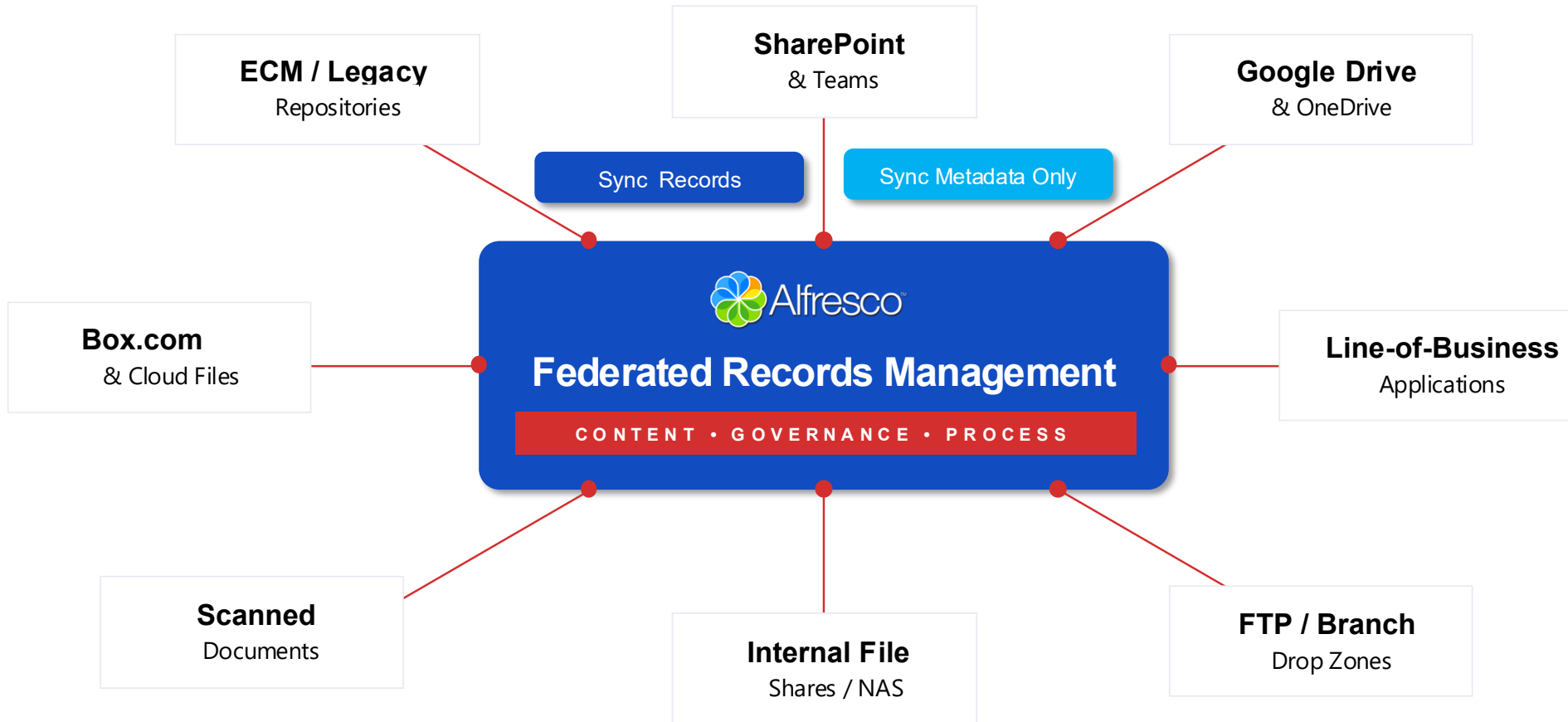
Security exposure, Governance Challenges, Productivity Loss and Compliance issues



Modernization Approach

Consolidate. Federate. Control

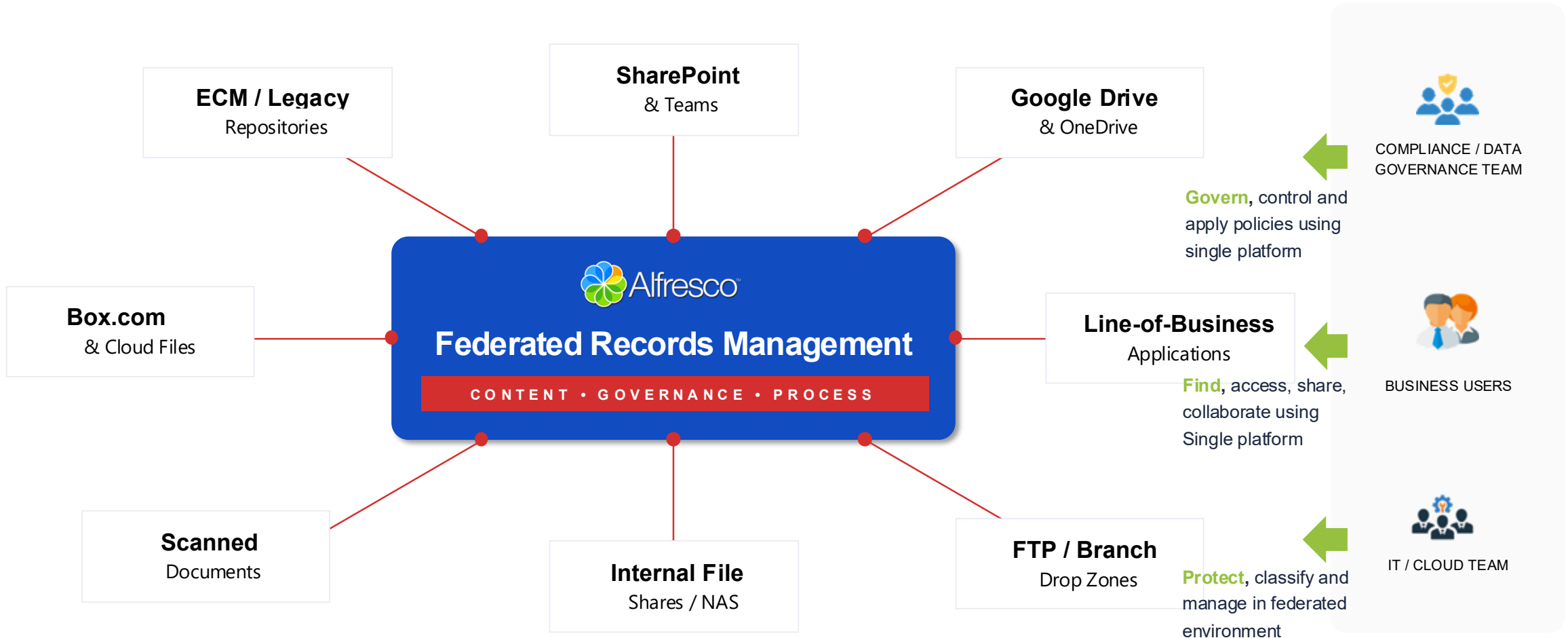
Federated Control on records silos. Search, retrieve, analyse, control and govern across repositories.



Modernization Approach

Federate. Control. Govern

Federated Control on records silos. Search, retrieve, analyse, control and govern across repositories.



AI & RAG LAYER

Classify. Govern. Automate

Build Enterprise RAG for all unstructured contents across silos, with one unified layer for your Agentic AI.



Business AI & RAG

Copilots • Knowledge Assistants • Operations AI • Agentic AI



Federated Records Management

Trusted retrieval context • Policy-aware access • Metadata enrichment



Classify

taxonomy • metadata
sensitivity • context



Govern

retention • hold
audit • permissions



Orchestrate

workflow • events
service actions

* RAG = Retrieval-Augmented Generation

Power of AI

Classify. Govern. Automate

Traditional OCR is
unreliable



AI Agents can read the information from records with much greater accuracy, even **multi-lingual** records and **correct words** to achieve near-perfect results.

AI helps make the Records Management more efficient, reduce error and make finding information more magical.

The screenshot displays a web application interface for document management. The top navigation bar includes 'Dashboard', 'Tasks', 'Documents', 'Records', 'Reports', and 'Apps'. Below this, a secondary navigation bar shows 'Document Library', 'Upload Documents', 'Templates', 'Recent Documents', 'My Favourites', and 'More'. The main content area is titled 'Invoice Upload docs (2) docx'. It features a preview of an invoice document with the following metadata:

Sure! Here's a realistic sample of the metadata filled out for an invoice document:

Document Type: Invoice
Invoice Date: 20250815
Vendor Company Name: Optima Engineering Sdn Bhd
Bank Name: RHB Bank Berhad
Account Number: 123456789012
Total Amount: 98500 (Only numbers as requested — no currency symbol or commas)
Invoice Number: INV-20250815-041
PO Number: PO-20250801-077
Invoice Due Date: 20250914
Vendor Address: Suite 8-2, Jalan Teknologi 3/6, Kota Damansara, 47810 Petaling Jaya, Selangor, Malaysia
Bill to Company Name: SkyBuild Construction Berhad
Bill to Company Address: Level 17, Tower A, PJ Trade Centre, Jalan PJU 8/8A, Damansara Perdana, 47820 Petaling Jaya, Selangor, Malaysia
Tags: Invoice, Engineering Services, Optima, SkyBuild, August 2025, PO Linked

To the right of the document preview is a 'Verify Metadata' form with the following fields:

- Select Document Type: Invoice
- Invoice Date: 15-08-2025
- Vendor Company Name: Optima Engineering Sdn Bhd
- Bank name: RHB Bank Berhad
- Account Number: 123456789012
- Total Amount: 98500
- Invoice Number: INV-20250815-041
- PO Number: PO-20250801-077
- Invoice Due Date: 14-09-2025
- Vendor Address: Suite 8-2, Jalan Teknologi 3/6, Kota Damansara, 4;
- Bill to company Name: SkyBuild Construction Berhad
- Bill to company Address: Level 17, Tower A, PJ Trade Centre, Jalan PJU 8/8A.

The interface also includes a search bar, a 'Search tags' field, and a 'Next' button at the bottom right. The footer shows 'Showing 1 of 1' and '90%' zoom level.

Power of AI

Classify. Govern. Automate

Finding information is tough



AI search /Chat allows users to retrieve information contained in multiple records / folders on single screen in intuitive Q&A manner.

AI helps make the Records Management more efficient, reduce error and make finding information more magical.

The screenshot displays the CREST Records Management interface. The top navigation bar includes 'Dashboard', 'Tasks', 'Documents', 'Records', 'Reports', and 'Apps'. The main content area shows a 'Contract Overview' dashboard with the following data:

Metric	Value
Total Identified Contracts	18
Contracts with Specific Amount Data	17

Financial Summary

Category	Amount
Aggregate Value	5,562,569,109.00
Average Value	327,209,947.59
Minimum Individual Amount	121.00
Maximum Individual Amount	5,555,555,555.00

Supplier Distribution

Supplier Frequency	Company Name
Most Frequent (2 Contracts)	Crest Infosolutions, TEST
Other Represented Suppliers	Innovate Solutions Inc., KWAP, PT ABC, PT TEST

Answer generated by AI from the following

- Non_Disclosure_Agree... Created: 16th April 2026
- testing dj.docx Created: 17th April 2026
- 9_Other_Document_JS... Created: 20th March 2026
- NETMARKS TEST 123... Created: 13th April 2026
- ddd.docx Created: 16th April 2026

Power of AI

Classify. Govern. Automate

Records Authenticity is
questionable



If AI can generate fake content, it can also help detect the AI generated records to ensure authenticity.

AI helps make the Records Management more efficient, reduce error and make finding information more magical.

Key Techniques Used

- **Computer Vision & Imaging:** These tools scan for altered backgrounds, inconsistent fonts, or manipulated security features (e.g., watermarks)
- **Metadata Analysis:** AI checks for inconsistencies in file data, such as capture device, geolocation, and timestamps
- **Behavioral Analysis:** For surveys or research, tools track behaviors like tab-switching or copy-pasting to distinguish between human and AI-driven responses.
- **Forensic Analysis:** Techniques like Error Level Analysis (ELA) are used to detect cloned or spliced sections within an image
- **Multi-Modal Detection:** Modern tools combine text analysis, image forensic, and facial liveness checks for verification.

Conclusion

Compliance. Security. Cost Savings

AI enabled federated records management for finding, controlling, managing and governing business records using single platform.

Business Users

Find • Share • Collaborate • Analyze
on Single pane of Glass

IT / Cloud Team

Federated Management • Control •
Protect • Automate

Records / Compliance Team

Classify • Retain • Audit •
Govern • Report

THANK YOU!



Hemant Prasad



LinkedIn Profile

