



Accelerating efficiencies with automated content management

OVERVIEW

A private estate in the UK were seeking a partner to help them implement an automated document and record management solution, which would manage their digital and physical content and records.

CHALLENGES

Their starting point, like so many organisations, was an itemised collection of physical records alongside a digital landscape predominantly made up of content held in unstructured file shares and exchange mailboxes.

REQUIREMENTS

In order to find a suitable partner to work along with them, the client required that a smaller scale project was implemented by the chosen vendor on a SharePoint 2016 platform.

This would give a chance for both the client and vendor to refine and demonstrate a partnership approach to implementation. The client has remained committed throughout the relationship to getting the delivery of the correct solution. This has been achieved through dialogue, change control and an openness from Equiniti ICS to adapt and become open to change.

The initial smaller scale project was a solution to manage security across the estate by occurrence logging, incident/intelligence reporting, technical equipment faults and visitor management. It was delivered successfully and to the client's satisfaction in Quarter Three 2017. Following from this, Equiniti are currently in the process of rolling out a Phase One content and record management solution.

SOLUTION

In order to provide the security solution, Equiniti ICS guided and provided support to the client IT department, detailing the SharePoint 2016 farm needed to meet the requirements of the solution and actively implementing and installing the farm. Based on this, the original stated requirements of the client and a series of requirements workshops, Equiniti ICS produced the solution requirements and an agile delivery plan.

During implementation there were changes to how the solution should work, which Equiniti ICS openly and actively included in its delivery process. This was born out in the design and ultimate implementation of the final solution, which is now used extensively on a daily basis.

For the implementation of the longer term content and record management rollout, Equiniti ICS pivoted to a waterfall-based delivery model based on the requirement of the customer to produce a correct and quality solution with a slightly longer delivery timeline than an agile process.

Equiniti ICS again captured requirements through a series of workshops, taking an agnostic approach to the solution until requirements were understood.

As a result of requirements gathered, Equiniti ICS produced an Information Architecture, platform Governance plan and Functional specification, detailing the makeup of the proposed solution. This solution was made up

of SharePoint 2016 as the primary platform for content storage, management and collaboration for end users.

Equiniti ICS introduced a template design enabling the client to work in collaborative project, team, functional and departmental work areas with a unique mechanism to handle ad-hoc lock-down of information through 'secure areas' within SharePoint libraries.

Allied to this Equiniti ICS recommended the use of RecordPoint to manage physical and digital records. As part of that, Equiniti ICS is providing a records classification which will be abstracted from end users and have appropriate rules, disposition and retention policies automatically applied.

Finally Equiniti ICS also recommended the use of Repstor Affinity to manage the integration of outlook mailboxes with SharePoint. Given the volume of content currently stored in exchange mailboxes, this is the ideal solution.

OUTCOME

The security management solution is currently in active use within the organisation. It has completely replaced a manual process and increased visibility of visitor management and events within the estate. The content and record management project is in the final stages of Phase 1 implementation with client and vendor both satisfied with the quality and capability of the design.

KEY BENEFITS

- Improved processes including system-driven approval, review and retention workflows, leading to improved efficiency
- Provision of a platform that allows increased collaboration capability and improves access to information, making it available and time from any location
- Flexibility to meet changing organisational requirements
- Quicker navigation and searching of relevant content
- Fully automated retention and disposal mechanisms to meet legislative requirements and internal policies



Thanks to the input of our security team members, Equiniti ICS has made SharePoint into a Swiss Army Knife solution for managing security. We log our occurrences, incidents and intelligence reports in a Fisher Price way so that the whole team has a common operational picture of what is going on. We can search right across the system to dig out previous data. In addition it records technical faults with security equipment, manages visitors effectively and is the library for our standard operating procedures and emergency plans. We couldn't function effectively without it."

SECURITY MANAGER

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