

EQUINITI

CASE STUDY CONTENT MANAGEMENT (EDRM)

Equiniti created a document and records management solution for a UK central government department, with the dual aims of increasing collaboration and meeting compliance obligations. This would be followed by the management of the overarching document and record management capability and use of SharePoint across the department's tenant.



Overview

The electronic document and records management (EDRM) solution built on Microsoft SharePoint by Equiniti is helping the department to effectively manage their day to day content and records for the entirety of their lifecycle, from creation to disposal. The solution allows end users to leverage search, content processes, collaboration, co-authoring, email integration and simple taxonomies in order to work with their content on a daily basis.

Previously, the EDRM solution had been implemented using a HP TRIM platform, which met the needs of the Record Management team within the organisation, but was underutilized by end business users across all departments. The department then chose to move from their legacy platform to a MS SharePoint OnPrem platform for all of their EDRM requirements.

Solution

Equiniti's fully managed EDRM solution works as a direct replacement for the HP TRIM platform and has included migration of all retained records from HP TRIM to a MS SharePoint environment. It has also seen partial migration of day to day content and disposal of large swathes of data in accordance with the department's retention schedule, during the migration process. The solution manages and retains data to IL3 (Restricted).

The department had a number of key requirements:

01

The migration of 60TB of information from file shares to SharePoint online

02

A solution that met the corporate needs of the organisation, but also provided a collaborative and intuitive digital working environment for end users and Record Managers

03

An end user classification that is fit for purpose across 80,000 users

04

Adherence to the department's security, governance, compliance, risk management and audit requirements

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Once implemented, Equiniti carried out a future road mapping consultation exercise to draw up a digital content management strategy for the department moving forward. This process involved looking at needs across the business in relation to content management (knowledge and information management team, end users, IT, remote workers, organizational governance etc).

The department has chosen to action this roadmap in full and is currently working with Equiniti and RecordPoint on the rollout of portals or templates across its HQ user base of 37,000 users. This will see formal records management applied across the entire user based for the first time in the department's history. Equiniti will also be managing the migration of ROT (Redundant Obsolete Trivial) analysis and migration from file shares to SharePoint Online and MS Teams within Office 365.

Project outcome

Equiniti successfully designed and implemented the department's replacement content and records management solution, as well as providing appropriate platform Governance plans and completed migration. As a result, the partnership with Equiniti is in place to this day, with Equiniti rolling out the content and record management roadmap across Office 365 as the primary platform.

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Key activities

- Full design and build of the information architecture, platform governance and system against a clearly defined specification
- Data mapping, planning and migration from HP TRIM to MS SharePoint
- Consultancy services aimed to formulate the future roadmap and strategy for the department in terms of content and record management, scalability, end user engagement and compliance on a cloud based platform
- Utilisation of Office 365 components in a controlled manner to provide a departmental wide content management solution scalable to 80,000 users +
- Utilisation of repeatable template based Information Architecture designs in conjunction with RecordPoint Records 365 for flexibility and comprehensive record management.

Equiniti extracted the requirements, designed and implemented the replacement content and record management solutions for the department on a MS SharePoint OnPrem platform. Equiniti then managed and carried out the migration of all existing records within the department from the underutilised HP TRIM platform to the new platform.

Key benefits

- Increased compliance with legislation and internal policies by implementing data life cycle management around their content
- End user abstraction from record management classifications
- 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
- Advanced de-duplication, ensuring a single version of truth across all documents and records
- End users have a simple flat file structure in line with the department's structure
- Increased usages of the core EDRM solution (moving from 1,500 to 37,000 users), thanks to a simpler platform and classification

