RecordPoint™

CASE STUDY

OIL AND GAS EXPLORATION AND PRODUCTION COMPANY EASILY MEETS INDUSTRY REGULATIONS WITH RECORDPOINT

An oil and gas exploration and production company headquartered in Australia needed an Electronic Document and Records Management System (EDRMS). They work in a heavily regulated environment and needed to gain control over their information. The company was keeping all information indefinitely, and this was creating problems as the company grew rapidly. The organization found that people were keeping a lot of information on local drives which led to problems with security, consistency, and knowing which information was current. The staff were struggling to find information and duplication on the file share was out of control. The organization decided to use SharePoint 2013 for document management, but needed more robust records management functionality to meet their compliance needs.

SHAREPOINT AND RECORDPOINT AS THE SYSTEM OF RECORD

The organization compared several SharePoint records management products and decided that RecordPoint for SharePoint met their requirements and was the most user-friendly records management tool as it hid the record functions from end users, allowing SharePoint to be configured to meet the needs of the business. Their requirements included physical records management, support for both SharePoint on-premises and SharePoint Online, and a support desk in their region. RecordPoint met all of these requirements and more through its global service desk, physical records management capabilities, and hybrid capabilities.

SharePoint 2013 and RecordPoint for SharePoint is the organization's official system of record. There are other Line of Business applications

used throughout the business, but those are managed by the department and records are sent to SharePoint/ RecordPoint as needed.

A SUCCESSFUL IMPLEMENTATION

This organization used a practical approach to the implementation of RecordPoint that would work well for other companies. First, they scanned their file shares to understand where documents were located, their age, and to inform content categorization. Second, they planned and built the SharePoint infrastructure and took RecordPoint's automated rules engine into account when designing their information architecture. The organization used SharePoint content types and managed metadata to drive consistency across sites. Next, they implemented RecordPoint and configured the automatic classification rules. Finally, they processed all documents which applied a classification and retention schedule.

RECORDPOINT BUSINESS BENEFITS

The biggest benefit to using RecordPoint is that the end users don't know it is there. They don't have to manually classify records or move records to a different system. When end users perform their daily work all their content is managed appropriately but automatically - users don't have to think about it.

RecordPoint is also easy for the Records Manager to use. They log into a single RecordPoint dashboard that displays all records information. Records Managers can easily see unclassified content across all content sources, manage physical records requests, and perform bulk sentencing and disposal actions.

Most importantly, RecordPoint provides peace of mind. The organization is no longer worried that keeping data forever that will expose them to an eDiscovery or litigation risk. They also aren't concerned that content won't be classified properly or that it will be deleted prematurely.

LOOKING TO THE FUTURE

There are a few goals that the organization has for the future of their records management program. First, the organization is going through a merger. There is work to bring the acquired company's documents into RecordPoint to be managed properly, and work to migrate content as needed.

Next, the organization would like to manage more content sources, such as in line of business applications and a hybrid SharePoint environment including Office 365 content within RecordPoint. This is possible with RecordPoint's Records365 platform, so they will consider using that service in future.

ABOUT RECORDPOINT

Multi-award winning Microsoft partner RecordPoint Software develops productivity applications that enhance the functionality of Microsoft's flagship collaboration suite, SharePoint. RecordPoint helps organizations ensure their document management processes are compliant with corporate policy and Government legislation.

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