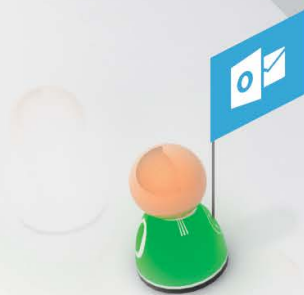**affinity**

Successful ECM adoption through Outlook

"By building on our existing SharePoint set-up we have saved a lot of time, and the economics of this approach have been compelling. Investing in add-on tools wasn't very expensive, but we have gained enormously"

Repstor affinity turns SharePoint into a robust document management, collaboration and compliance control platform for major energy industry regulator

A major international energy regulatory authority employs 200 people to ensure compliance with reliability standards.

Document management is critical to the not-for-profit organization's everyday activities. If energy suppliers are found not to comply with the agency's rigorous standards, it must take action - creating, collating and processing legal documents, evidence, settlement agreements and so on. In a given year, the authority might handle around 1,000 cases.

Restoring order

Traditionally the agency has used Microsoft SharePoint and shared folders in Outlook to manage content, but without any formal structure to folder organization or naming. According to the VP and chief technology officer, "This was a big issue: content wasn't easily searchable unless you knew the folder structure, which was often personal to an individual."

As a result case handlers and administrators could spend a long time trying to track down documents, and without ever really being sure they were working with the latest version. As volumes of content continued to grow the situation was worsening, hampering efficiency. The burden on storage and network capacity was also increasing, due to the over-reliance on email as a means of passing documents back and forth between the different parties involved.

The regulatory agency has a highly mobilized workforce too. All employs have laptops rather than desktop PCs, and spend a lot of time travelling. This could affect productivity, unless staff proactively downloaded copies of documents to their own systems to work on when out of the office.

The organisation also wanted to introduce greater controls to information access, to ensure that there was never any chance of sensitive or confidential information getting into the wrong hands.

Familiar foundations drive best practice

The authority engaged PwC to analyse its needs and review the options for a more formal document management solution. Key requirements included proper classification and management of confidential information; fulfilling internal audit recommendations and mitigating corporate risk; improving information access and search; enabling improved collaboration; supporting document retention policy and procedures; simplifying document retrieval; improving document version and workflow control; and increasing efficiency and employee productivity.

PwC compared specialist systems like Hummingbird and Documentum against SharePoint-based options which would build on the agency's existing software investment. "They concluded that, given our experience with SharePoint, we should continue to use this platform - enhanced with companion tools that would give us all the control we needed," the CTO explains. PwC led an evaluation of a number of third-party products including Repstor affinity™– which the agency chose as the best match for its needs. This offered everything the agency needed and more, along with easy installation and ease of integration.

The regulatory body rolled out the software department by department, to all 200 users. Because it works with the organization's existing SharePoint software, the additional cost was very affordable and almost no training was needed. One of the great benefits of Repstor affinity is that it provides native Outlook integration to SharePoint, so users don't even have to think about where they are storing and accessing content. This meant there was no learning curve, and user adoption levels were automatically high.

"Collaboration is now much easier, and more reliable," the agency's CTO says. "It's much easier for multiple editors to work on documents now, because there's only ever one master document, with a full version history assigned to it. This is a huge benefit for us. We've removed any anxieties users once had about whether they were using the latest version of a document – which could go through as many as 20 rounds of edits."

It's much easier for users to call up content too now, thanks to the rich metadata that can be applied to documents, he adds. "Users no longer need to know where they are located to find them; they can simply do a key-word search."

Greater control, improved flexibility

For the IT team, Repstor affinity has curtailed the growth in storage requirements and eased the load on network bandwidth. Just as importantly, the affinity system provides offline as well as online document access, so users can view, add and edit content whether connected to a network or not.

"This has made access to document management much easier for travelling employees," the CTO notes. "It means their mobility does not affect productivity, because they can continue working offline: they're no longer dependent on a LAN or broadband connection."

Document confidentiality is closely protected throughout, however. "Repstor affinity gives us good control over access privileges, so that if users do not have permissions to certain record centres, they cannot access them."

> "Document management is now significantly better controlled."

The deployment has been a resounding success, he concludes. "By building on our existing SharePoint set-up we have saved a lot of time, and the economics of this approach have been compelling. Investing in add-on tools wasn't very expensive, but we have gained enormously – not least by avoiding introducing new system complexity that IT would have to support. Our instinct was right - Repstor affinity has proved a great fit for our needs."

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