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## Miktysh Case Study

North Queensland Bulk Ports (NQBP)

Miktysh ECMshare - February 2017



# ECMshare

Enterprise Content Management Specialists

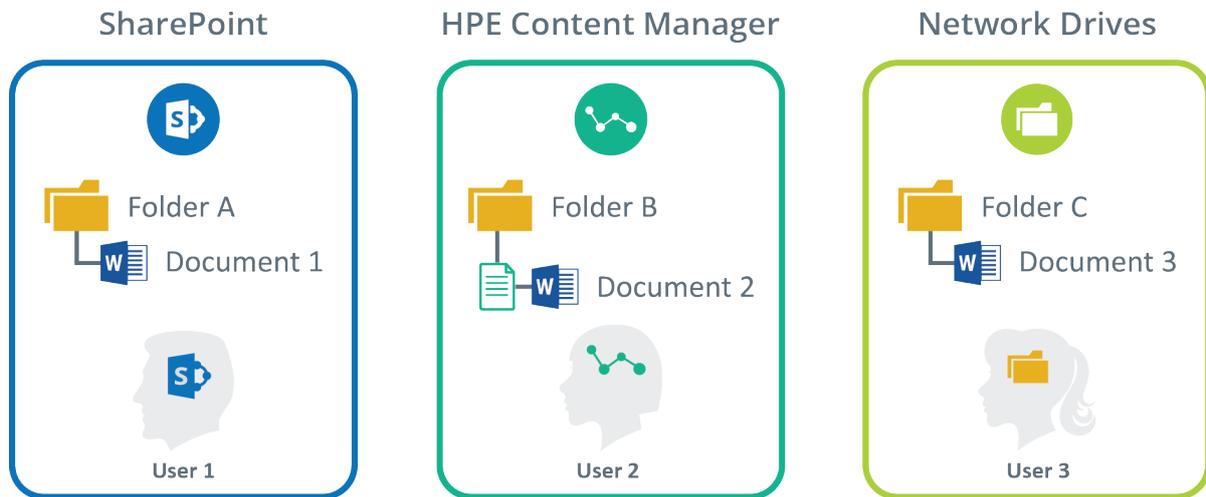


Since early 2015, Miktysh have worked with North Queensland Bulk Ports Corporation Limited (NQBP) to strategically plan and roll-out a method of capturing all documents in one place. NQBP are one of Australia's largest port authorities and more than half of Queensland's trade, by tonnage, pass through their ports - coal, bauxite, sand, sugar, grain, petroleum and general cargo.

As a vital provider of Australia's import and export performance, NQBP originally undertook a HPE Records Manager (HPE RM8) integration project with Miktysh to ensure the organisation not only remained a recognised leader in the delivery of bulk cargo infrastructure, but a leader in content management. As a port authority, NQBP are responsible for strategic port planning, business development, infrastructure development, environmental management and marine pollution, security and safety, issuing licences, leases and permits to other organisation's for use of port land, and many other services which require strong multi-user information infrastructure for operational efficiency.

Working closely with Bruce Fisher, the Chief Information Officer at NQBP and their divisions, Miktysh conducted a content landscape review. Utilising Miktysh's ECM-L tool (Enterprise Content Management Landscape tool), analysis revealed not all divisions were using HPE RM8 to save documents. Client employees had access to shared network drives devoid of structure or titling methods, resulting in content chaos and duplication. It was determined a single source of truth was required to ensure all content was being captured and to maintain records management compliance. The ECM-L tool allowed Miktysh to gain insight into existing content structure and locations in the network drive, perform a review of the BCS in HPE RM and SharePoint.

HPE RM8 had been implemented by NQBP as the platform to provide corporate information compliance and staff were capturing content, however exactly what constituted a record and where it should be captured was lost. Although the platform was available, the methodology of records management was to save everything, anywhere within HPE RM. The review of use revealed a small percentage of staff used HPE RM to manage corporate content, whilst the remainder used tools they were familiar with; predominantly network drives and SharePoint document libraries for storing and organising content. In effect corporate content was scattered throughout the organisation and unbeknown to the client, was not being retained in accordance with relevant legislation.



Miktysh ascertained the Client required users to continue working with familiar tools (network drives and SharePoint), in a way conducive to content being correctly captured and managed compliantly by HPE Records Manager 8; without requiring significant (if any) change to current user methodology.

Once Miktysh determined how the network drive folders were going to be mapped to the BCS in HPE Records Manager, they designed the SharePoint Workspaces. To ensure all content was being captured in HPE RM, regardless of where it was saved, the recommendation was to 'combine' the shared network drives, SharePoint and HPE RM into one source of truth across the three platforms; a cost effective solution called ECMshare. This methodology allows the user to perform "business as usual" with a single source of truth. Miktysh utilised the HPE RM SharePoint Governance and Compliance App to allow HPE Records Manager to perform "in place" management of content in SharePoint.



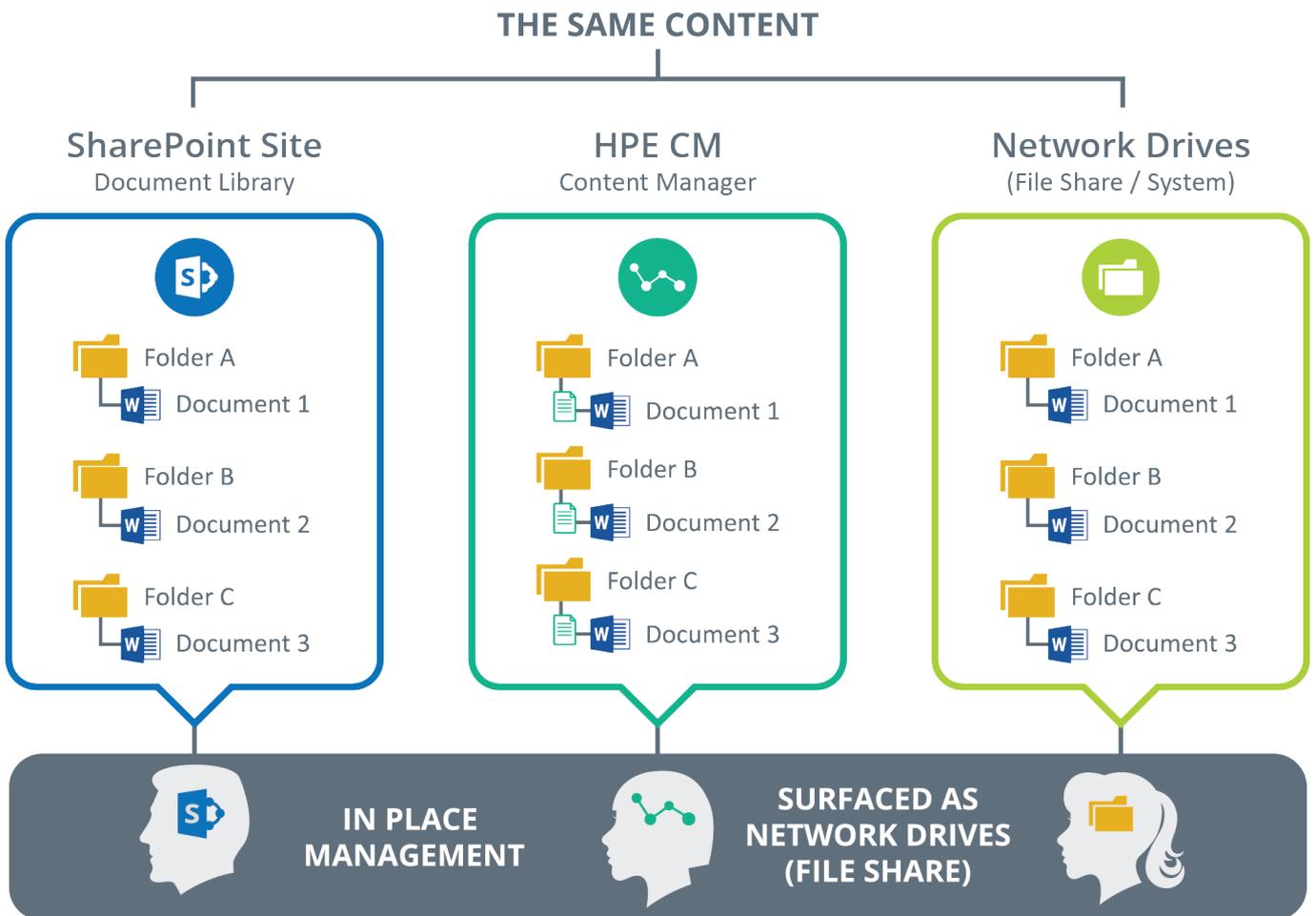
Recommendations around the structure of SharePoint sites and libraries were made. The structure was loosely based on NQBP's BCS as this provided the simplest mechanism for identifying how content should be retained by HPE RM8. Records Management Options were applied in the SharePoint Governance and Compliance App at various levels to determine how content should be managed by HPE RM. Where relevant NQBP's SharePoint workspaces would be surfaced as network drives, allowing users to continue to use the network drives (file share system) paradigm for organising content if their preferred way of working.

The immediate and profound benefits of implementing Miktysh's ECMshare solution into NQBP included the ability for users to create content in either network drives, document libraries or HPE RM, catering to the personal preference of a user; regardless of where content is created it is available through any of these locations. NQBP users now have the ability to use sub folders to logically group related content without affecting how it is retained. Users can also delete content from network drives and SharePoint when no longer considered relevant, however documents will continue to be retained by HPE RM in accordance with retention schedules.

"Users can freely use the network drives, SharePoint document libraries or HPE RM directly to save their information. No one is restricted to one way of saving their content. Our Records Managers know regardless of what a user uses, the end result is content managed in place with HPE RM. We have a single source of truth."

NQBP now capture content in a compliant and structured manner as ECMshare is rolled out in stages. As each drive is mapped and integrated, the percentage of relevant data being captured drastically rises. The ROT has decreased and stays in unmanaged areas of SharePoint and the network drives.

"NQBP have not had the big-bang implementation approach, we are methodically introducing areas to ECMshare. It was important for us to migrate a selection of users to test our internal response to the new functionality. Users have responded positively to working within their chosen program knowing compliance is no longer an issue. This structure allows for business as usual."



Overall the project has taken 4 part-time resources 12 months to implement, with learnings from all parties involved. Project planning formed the largest part of the project with cautious progression and comprehensive testing before implementation into a Production environment. Structured and accurate mapping was required before designing how SharePoint would look. Adequate time provisions were essential to ensure all data was analysed to allow for the ease of mapping back to HPE RM. Record Management Options within the HPE RM SharePoint Governance and Compliance App allowed NQBP to determine how each site managed it's content, whether it was by the site or the ability to use the manage with HPE RM button.

Prior to starting the implementation phase of ECMshare, NQBP upgraded to HPE RM 8.1 and SharePoint 2013 to ensure a smooth integration between the two products. Initially the Records Team was unsure of the sprawl across the network and SharePoint. It was not until Miktysh analysed NQBP information with their ECM-L tool that it became clear vast amounts of content needed to be captured and cleaned up. Once analysis was complete, Miktysh designed and mapped how the system would look and function into the future. Considerations were made to each of the current structures within each application.

The build of ECMshare took a period of months with integration hurdles assessed and fixed as identified. Initially the integration was built in a development environment to prove the concept and the integrations behind it. Once testing was complete, the solution was built into production, workspace by workspace.

**"Miktysh provided comprehensive analysis and ensured a smooth implementation process. Once ECMshare was integrated, it gave users the freedom to use whatever platform they felt most comfortable with. It reduced user conflicts surrounding records management processes and now staff can concentrate on their job rather than how, when and where to save information."**

In 2017, NQBP are upgrading to HPE CM9.1 and running ECMshare on the new version.

#### Key Benefits

- Reduce cost and effort for Capturing, Accessing, Retaining, Disposing and Storing
- Capture 100% of corporate information and achieve greater visibility
- No deployment required (zero footprint)
- Access, View and Edit corporate information from multiple sources
- Open and Save records from native applications
- Consistent approach to the way information is structured
- Reduce cost for training, information retrieval processes and compliance
- Users can access the application (HP TRIM / HPE RM, Network Drive, SharePoint) they wish to use for capturing their corporate information
- Processes are business as usual for the User
- Work in the Network Drive and have recordkeeping happen in the background
- Make SharePoint and Network Drives compliant without additional Add-Ins or Applications.

#### Tech Specs

- 150 seats
- HPE RM 8.1
- SharePoint 2013
- Office 2013
- Windows 7

For more information on this case study or our ECMshare Solution

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