

Major Australian Port Authority

Trade organization slashes record-keeping chores.



Overview

This major Australian port authority plays an important role in the country's export and import trade. It deals with the environmental condition and security of ports; issues licenses and leases; and plans port finances.

Challenge

The port authority faces a daunting information management challenge. It must ensure its employees keep track of records about property maintenance and finance, environmental issues, engineering work, legal matters, employees, and information technology matters.

Under freedom of information laws, members of the public can request certain port records including contracts and records about environmental matters. When this happens, the port authority must find and supply those records quickly. State authorities require the company to show that it has complied with these rules.

"Micro Focus (now part of OpenText™) Content Manager makes life a lot easier. I can concentrate on doing my job."

CHIEF INFORMATION OFFICER
Australian Port Authority

Before 2015, the port authority had no easy method of ensuring that all employees were following the same record-keeping procedures. Some stored documents in OpenText™ Content Manager, where they could easily find the documents later, while others stored documents on various network and desktop drives throughout the organization's network, then emailed them to colleagues.

Most importantly, employees were collaborating via Microsoft SharePoint, which didn't have an appropriate records compliance function.

As a result, it was impossible to find records quickly. "It was a black hole," says the port authority's Chief Information Officer (CIO). "You knew the information was there, but you couldn't retrieve it because you didn't know how to." It was also difficult to determine which system the record was stored in.

Solution

The CIO's goal was twofold. He wanted to be able to find critical business records quickly, rather than searching multiple locations. He also wanted to make it easier for employees to get on with their jobs, by using Microsoft SharePoint and saving content in a familiar way. This included the ability for staff to structure file storage in terms of network drives.

At a Glance

Industry

Maritime

Location

Australia

Challenge

Correctly store records and reduce risk while maximizing convenience for employees.

Products and Services

Content Manager
Content Manager Governance and Compliance
SharePoint App

Success Highlights

- + Automatically manages Microsoft SharePoint content and other sources with OpenText™ Content Manager, to reduce the risk of noncompliance with record-keeping regulations
- + Stores documents correctly
- + Reduces the time it takes to retrieve documents
- + Allows employees to follow normal work processes while achieving records compliance

"I have confidence knowing everything has been captured."

CHIEF INFORMATION OFFICER
Australian Port Authority

Connect with Us

[OpenText CEO Mark Barrenechea's blog](#)



He engaged OpenText™ partner Miktysh to help tackle the problem. Miktysh first identified where employees were saving documents and found that they were not correctly recording a large quantity of data. This created legal risks for the authority.

To solve this problem, Miktysh used the OpenText™ Content Manager Governance and Compliance SharePoint App. This app makes it easier for employees to manage Microsoft SharePoint content using Content Manager.

When a user saves an item in Microsoft SharePoint, the app add-in automatically creates and displays a record in Content Manager. Users also have the option to manually create the record. The document libraries used in SharePoint (and managed by Content Manager) are presented as network drives, allowing users to save items to those drives if they prefer. As a result, the port authority can create and find content in a network drive, Microsoft SharePoint, or Content Manager, even though there is only one instance of the record.

"It makes life a lot easier," says the CIO. "I can concentrate on doing my job, knowing everything is captured correctly and with minimum fuss."

The app add-in also allows users to search and view records in Content Manager from within Microsoft SharePoint, which saves even more time. Previously, employees often had to search network drives, Content Manager, and Microsoft SharePoint to find files. Now they can perform a single search and find the records regardless of where the information is stored.

Results

Decreasing Risk

There is now less chance that employees will forget or not bother to save records, lowering the risk of noncompliance with record-keeping regulations. Even if employees organize documents in subfolders, Content Manager will still manage the content. "I have confidence knowing everything has been captured," the port authority's CIO says.

The Content Manager Governance and Compliance SharePoint App also allows the port authority to choose how Content Manager will manage records.

Employees can delete content from network drives or SharePoint, and Content Manager will still retain them for compliance purposes. Content Manager can also automatically destroy records after a period of time, in line with certain compliance policies.

The organization can now find records a lot faster during a litigation exercise or in response to a request from the public under freedom of information laws.

Simplifying Collaboration

The Content Manager add-in for Microsoft SharePoint makes life easier for employees in other ways. For example, it allows them to collaborate easily on the same file without version conflicts, and ensures that they are properly managing records.

While there are other record management tools for Microsoft SharePoint, the CIO found the

Content Manager Governance and Compliance SharePoint App the easiest to use.

Solving Implementation Challenges

The CIO points to Miktysh's expertise as another benefit of choosing an OpenText™ solution.

Miktysh worked closely with the port authority for 12 months, planning, designing, testing, and implementing the solution. The partner integrated records into a single source of truth using its ECMshare framework. It also designed the structure of Microsoft SharePoint libraries. Miktysh also selectively moved users to the new platform, to ensure it had the time to properly respond to any challenges users might encounter.

"Miktysh has certainly come up with some innovative ideas to help move us along. They've got some very clever people working for them. It would have been a lot harder without them," says the CIO.

Miktysh also cut the amount of redundant and obsolete data the port authority was storing, increasing the value the company gets from its storage hardware.

Learn more at

www.microfocus.com/opentext