EDRMS Solutions for SharePoint

Electronic **D**ocument and **R**ecords **M**anagement **S**ystems are vital to any organization with mandated recordkeeping obligations. Many EDRMS technology solutions exist, but few have truly delivered on their promise of quantifiable compliance. Helux can deliver genuine EDRMS compliance on the Microsoft SharePoint platform. We combine the best recordkeeping technology, our strong SharePoint deployment skills, and rigorous EDRMS implementation methodology to ensure you achieve measureable success with your EDRMS project. Our combination of state of the art technology and methodology sets us apart, and ensures your ultimate success.

We specialize in the design, development, and deployment of solutions based on the Microsoft SharePoint platform.
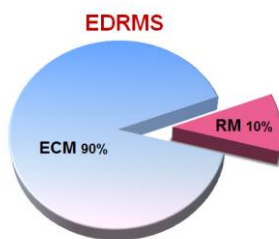
Gimmal's Compliance Suite delivers a sophisticated records management capability inside Microsoft SharePoint. US DoD 5015.2 certified, this product extends SharePoint's existing recordkeeping capabilities with a structured file plan, case file handling, forensic destruction, email declaration, site provisioning, and much more.

As a RIMtech Certified Services Partner, Helux uses RIMtech's EDRMS Implementation Methodology©. This provides a measureable, structured approach to governance and ensures measurable adoption and compliance.

Measureable Results

A successful electronic recordkeeping project requires a significant emphasis on business culture and organizational change, concrete measurement of goals and outcomes, and complete command of the s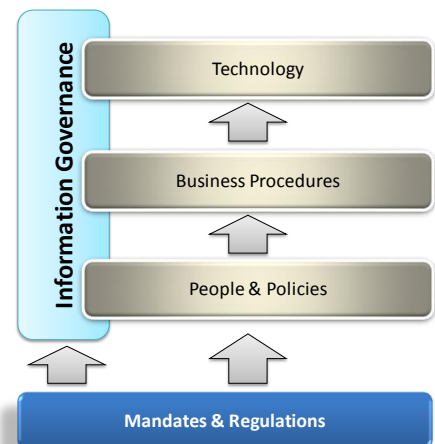oftware technology's capabilities and limitations, all within a consistent governance framework. The RIM component of EDRMS software may be only 10% or so, however *this 10% greatly impacts the remaining 90%*. RIMtech's **12-step EDRMS Implementation Methodology©** delivers the structure, rigor, and discipline needed for implementation success, regardless of the technology used or the particular corporate RIM culture. This methodology is a highly adaptable, fully compliant information governance plan that takes into account the people, policies, business procedures, and RIM/EDRMS technology in order to ensure a successful implementation. Most importantly, it utilizes well-defined concrete measures to ensure ongoing successful compliance that meet your business needs.

RIMtech
Governance Framework©

Enterprise Adoption

End user adoption is a point of failure in far too many EDRMS projects. Users don't want to be burdened with extra time and effort to reach compliance. But to achieve compliance, there must be extra rigor applied to the management of documents and email throughout the organization. We develop a comprehensive **E**nterprise **A**doption **P**lan (EAP) tailored specifically for your organization's business culture, level of technological sophistication, and the regulatory environment that applies to your users. A compliant environment means a new way of conducting business, and we help you manage that crucial organizational change.

Retention Schedule

The corporate retention schedule is at the heart of every EDRMS system. We evaluate your retention schedule and file plan for readiness in an EDRMS. We ensure that everyday case files are handled appropriately, in accordance with the retention schedule. We will also work to clean or modernize the schedule if necessary, and ensure it is properly loaded into the host recordkeeping system in an appropriate manner to support your business going forward.

System Configuration

SharePoint provides a strong base of core information management capabilities, and Gimmal Compliance Suite supplements this core with a broad range of advanced recordkeeping capabilities.
We see to it that SharePoint is configured appropriately to support the new compliance regime. We evaluate and configure appropriate document metadata, taxonomy, and a suitable access control schema. We define and implement an enterprise-wide end user workspace capable of eventually displacing existing shared servers. And we configure all aspects of the Gimmal Compliance Suite for a seamless end user experience that minimizes or even eliminates the burden on end users.

Legacy Migration

Most organizations already have a legacy recordkeeping system in place. We will migrate the electronic documents and physical records from such a system into the new EDRMS system. This typically requires a careful assessment of the quality of existing documents and records, a mapping of legacy metadata and security schema to the new system, and a custom-built migration tool. We can take care of legacy system migration from initial assessment all the way to decommissioning and cutover to the new solution.

Training

A modern EDRMS is an intricately integrated combination of a SharePoint platform, a recordkeeping application, an email integration, and (often), a physical records management system for folders and boxes. We develop our own training materials based on end user solutions that seamlessly use these underlying components. For instance, *How do I declare an email to be a record? How do I set security permissions? What happens to my document after it becomes a record? How do I search for email and boxes? How can I apply a legal hold?* The answers often involve different system components working together. We develop our own training materials based on a completely implemented, fully configured solution that has been properly tailored for your organization. Solution-level training, not component-level training – for end users, system administrators, records administrators, and technical support.

Governance Planning

SharePoint must be properly configured and deployed to support planned usage levels, as well as the expected data storage volume into the future. At Helux we define a formal governance plan for all our EDRMS solutions that that includes not just technology considerations but also the compliance environment. Where will documents and records be stored? For how long? How is access control to be governed? When will items be destroyed? How to prevent folder/site creep, and how to avoid internal limitations? A sound governance plan will ensure your compliance on an ongoing basis, as well as ensure maximum performance for the life of your system.

Customization

There is no such thing as an out of the box EDRMS solution. The SharePoint environment, the recordkeeping software, and the email integration must be properly configured. Beyond configuration however is *customization*. Certain solution elements must be customized to your particular organization. Most notable is *Declaration* – how users get documents into the system as records. We will custom-tailor declaration methods that fit with your end user culture and compliance requirements, while meeting your business needs.

Project Management

EDRMS projects are multi-faceted and can be complex to implement. The project will involve different product vendors, software configuration, custom development, legacy system migration, change management, training, pilot, and deployment. At Helux, we manage all our EDRMS projects with formal project management techniques to ensure your project stays on course and on budget.

Contact Helux today to learn more about how we can help you achieve your successful EDRMS implementation at info@heluxsystems.com

Partner

www.heluxsystems.com