Large Global Organization in Aviation

The organization is now benefiting from all the advantages of a modern electronic email records management solution.

INDUSTRY: Aviation

USE CASE: Email Records Management

Introduction

A large global organization in aviation with offices worldwide needed a cost-effective solution to support paperless email-records management best practices. To improve centralization, metadata tagging, and discoverability, official email communications needed to be stored on SharePoint, their records and document management platform. The organization's leaders wanted an easy-to-use solution to foster adoption and utilization among staff. They chose Colligo.

Business Challenge

The aviation company was looking for an alternative to their paper filing practices for official correspondence. All official email messages were printed and centrally filed. It was becoming increasingly difficult to find needed information quickly – the organization was simply not able to keep pace with the accelerating velocity of communication. In addition, the volume of paper was growing out of control, leading to physical-space concerns and overhead costs. The organization needed a cost-effective solution that would allow them to go paperless and modernize its email-records management practices.

The organization's leaders wanted to improve governance by implementing an electronic email records management system. With SharePoint already deployed, the company sought to leverage its current investment by finding a SharePoint-Outlook integrated solution.

Another key requirement was the capability to add metadata. The ideal solution should provide a metadata form, prompting users to provide required metadata. The organization needed a solution that ensured messages were filed properly, classified in accordance with the company business rules.

Solution

The company chose Colligo to extend SharePoint capabilities for email records management.

In order to efficient follow their business processes, the company's leaders implemented a filing system with distinct user groups – Focal Points and regular users – to ensure only trained staff stored email records in accordance with their official archive structure. Now, regular users in each area use Colligo to save official email messages in a particular folder easily and quickly. Then the Focal Point users select those messages, examine the contents, and file

"During the implementation, support was very good. We had a good experience with the Technical Support Team which has always been very responsive. We have a very good relationship with Colligo."

them directly to the appropriate folders in SharePoint with the required metadata. There is a limited number of Focal Point users – approximately 200: This allows for better consistency when choosing where to file messages and what properties are added. The flexibility of Colligo allowed the organization to implement a filing system in accordance with its business rules.

The Colligo solution:

- allows the organization's users to select, then file official emails in SharePoint
- supports business-requirement and organizational culture criteria to file correspondence
- provides a streamlined email-filing process for SharePoint
- supports automatic metadata capture and managed metadata to ensure messages are classified in accordance with business rules

Colligo offered support available during normal working hours for the company's headquarters, an important factor in the company's purchase-decision process.

Results

"Colligo has been a game changer for us. The biggest benefit is that our official correspondence is now securely and efficiently placed in a central repository that is available to the entire organization. It is now much easier for staff to find the information that they need."

The implementation of Colligo has completely changed the company's email-management paradigm: The entire organization has now moved away from paper correspondence to efficient electronic email and efax records-management practices.

The organization is now benefiting from all the advantages of a modern electronic email-records management solution. IT leaders with the company have eliminated their physical space problems and costs. More importantly, Colligo has increased the volume of official email records filed to SharePoint. Previously, people occasionally did not file correspondence because it was inconvenient to print hard-copy emails to be filed. Now with the ease of drag-and-drop and send-and-file Colligo features within Outlook, it is easy for the company's users to select email records for central storage right at the time they read incoming mail and send important communication.

"We are very satisfied with the Colligo solution and its usage has expanded since it was initially implemented."

Deploying Colligo has enabled this organization to:

- Increase filed correspondence
- Improve document "findability"
- Reduce cost with paper and physical space
- Improve regulatory and corporate compliance

colligo

Colligo enables workers to have easy, anytime access to content stored on enterprise information systems such as SharePoint/Office 365, regardless of device or connectivity. The company's award-winning collaboration and data sync technology is used to increase worker productivity, streamline collaboration and reduce IT risk. Colligo counts many high-profile organizations amongst its customers, including Microsoft, Exxon, Chevron, Shell, GAF, Bayer and the US Department of Energy.

You've invested time and money to deploy SharePoint. Now is the time to fully leverage your system for the unique business scenarios of your users.