

"I knew what you could do with SharePoint, and it would be very difficult and tedious to be able to manage the rules if I managed them directly into SharePoint. This is where Gimmal's solution came in."

Howard Loos, Records and Information Manager, Brigham Young University

Brigham Young University Modernizes Records Through Automation

Industry

Higher education

Customer

Brigham Young University (BYU) is the largest religious university in the country and the third largest private university. BYU has a population of 33,000 students.

Technologies Employed

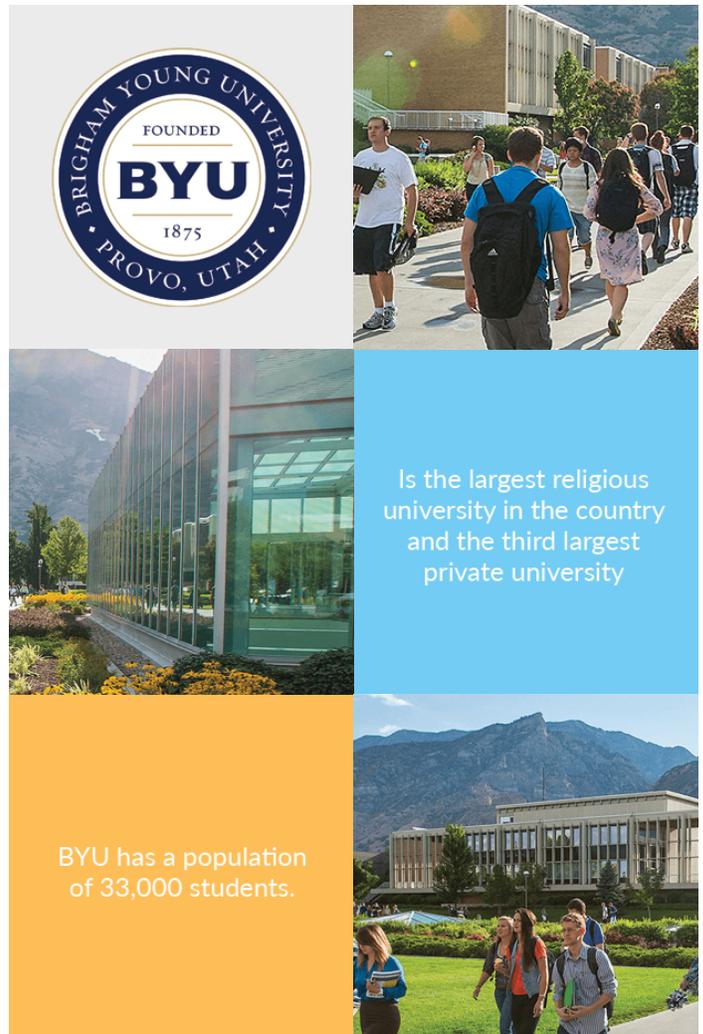
Gimmal Records

Challenges

- An inefficient "paper-based" approach to managing records required manual classification by users
- Concerns about compliance risks due to large quantities of unmanaged information
- High costs related to finding, managing and storing growing quantities of unmanaged records

Results

- Legally defensible management of electronic and physical records including legal holds
- Easy to use rules and automated governance eliminated end user tagging and classification
- Automated destruction of records with approval processes



Background

Brigham Young University is a private research university in Provo, Utah, United States. It is owned and operated by the Church of Jesus Christ of Latter-day Saints, and has the largest on-campus student population of any religious university in the United States. Howard Loos is the Records and Information Manager at BYU and is responsible for handling the daily and historical records at the university. BYU had accumulated millions of records that were not able to be practically or effectively managed. Howard knew the university needed a new strategy to address this challenge. With a modernized records management program and better tools for information management, they would improve record compliance across the organization.

Solution

Working with the university's leadership, Howard and his team quickly decided that they needed a third party software solution to manage the retention and transfer of SharePoint records.

Howard's team investigated other third-party options, but selected Gimmel Records because it met their needs and was the easiest system for his small team to administer, with little help from IT.

BYU had a well-defined need and a desire for flexibility that would amplify the existing capability of SharePoint. Howard stated, "We needed a tool that could develop a file plan and then map the file plan with the rules to various sites."

Additionally, he identified the critical things they needed from a solution: the ability to transfer historical records to the digital preservation system, manage records in-place and streamline the approval process for destroying records.

So he turned to Gimmel, who provided the perfect software solution for his needs.

Gimmel Records provides a solution that is easy for a small team to administer across all of their SharePoint sites.

Software and Services Used

Gimmel Records was quickly implemented to govern SharePoint content and manage retention with automated rules.

Results

With Gimmel Records, SharePoint is a modern records management system. Deployment was a simple process, with BYU implementing SharePoint into 62 of their 400 departments in 2016. BYU is able to centrally control their policies for all sites and locations from one location, manage records in-place and avoid the cost of moving records to another system, streamline approval for records destruction, enforce legal holds and transfer historical records to their digital preservation system.

BYU will continue to roll out the solution to their remaining departments and benefit from a more advanced yet practical records management system. They are especially happy with the ability to apply legal holds, defensibly dispose records and mitigate the risks and cost of retaining outdated information. Howard stated, "The software is so flexible that as records management evolves into information governance, the tool is adaptable enough to handle it."

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