Record Management

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# **Business Scenario**

A manufacturing Baking company named Bakers Delight produces bakery products for retail outlets which has been spreading rapidly from past 15 years. The growth has been enormous from a small bakery supplier to a large suppliers. The database and accounting software they were using has out-dated. Also, they do not follow any software business tools for any of their documents, files or business processes.

# **Types of Documents Used**

Bakers delight company has many departments in order to meet overall companies’ mission and vision. The following are the departments that are present Sales and Marketing, Production, Finance, Human resources .

|  |  |  |
| --- | --- | --- |
| **Department** | **Documents** | **Retention Period** |
| Production | Bill of Material | 2 years |
| Production Requirements Document | 1 year |
| Inspection Guidelines for Quality Control | 1 year |
| Human Resources | Salary Structure | 2 years |
| Expenses and traveling | 3 years |
| Performance Tracking | 1 year |
| Job profiles | 5 years |
| Sales and Marketing | Marketing Agreement | 2 years |
| Strategic Blueprint Plan | 1 year |
| Content Schedule | 2 years |
| Finance | Balance sheet | 1 year |
|  | Income Statement | 1 year |
|  | Stakeholder-equity Statement | 1 year |

# **Recommendation**

The following are some of the recommendations that I would like to consider for all the documents that are present in every department of bakers delight company.

The below mentioned features in record management will cover the business needs.

**Content Organizer:**

Content organizer allows to collect and organize the material. Content organizer is like workflow process which provides the routing process to the documents based on the metadata present in the document .A drop off library is a single library where all the documents based on property gets stored. Content Organizer helps in controlling the duplicate document uploading.

**Record Retention Rules:**

Every company has many documents that need to be retained at certain period .The record retention rules will automatically declare or undeclare the items based on the items properties and also needs protection so that they won’t get deleted once they reach specific point in the lifecycle.

**Record center:**

Record center is a template that is created to store and manage records. The record center template helps in storing and finding the document for the long-term purpose. Record center has properties that needs to be filled out too store the document in the correct library i.e., automatically routes the document .

**Holds:**

We can put the data content in hold when we don’t want the data to be accessible by every user. Content hold help to protect the data from being deleted or expired until the data is in use. Modification of content cannot be done when hold is enabled. By default, record center site has hold feature whereas other sites need to activate the hold.

**Document Deletion Polices:**

Deletion policies defines the policies to delete the document after a certain period.

Example: Bakers Delight company wants to advertise their offers to their customer, so these offers advertisement should no longer be more than 5 days .

**Data Loss Prevention Policies:**

Record management consist of many documents which are sensitive and confidential ,so this policy helps in protecting these documents from unauthorized access. DLP policies protects the sensitive data from being shared with other.

Example : Baker delight company has their in-house recipes to prepare their product. Here these recipes need to be considered as the sensitive data which shouldn’t be shared with other company and only the concerned person should have access to that.

(Smith, 2016)

# **Reasons for Using Recommendations**

The following are the reasons for choosing the above recommendations.

1. **Controlling creation and growth of record:**

Record management helps in controlling the growth of duplicate record and the documents that are not needed to the business operations.

1. **Reduce operating costs:**

Manual record keeping requires storage space ,staffs to manage those records .By switching to record management in SharePoint we can get rid of all these operational costs.

1. **To Improve Efficiency and Productivity:**

Document searching takes a lot of time ,by using this record management the retrieval of the document can be enhanced which in-tur improve the productivity and efficiency .

1. **Protect Important Information:**

Every organization has important information which needs to be protected .Record management has a feature which does that .

1. **Preserve corporate memory:**

Organization need data to be preserved so that it can be helpful for them in the future for business decision making through record management that data is preserved securely. (Kempner, 2014)

# **Client Decision**

Based on the recommendations and the reason given the client has agreed to move forward with record management site to mange the documents .

1. Organization agreed to use record center for HR department.
2. Organization agreed to use content organizer for Financial Department
3. Organization agreed to use data prevention policy for Sales and Marketing Department .
4. Organization agreed to use holds for Production Department .

# **References**

Kempner, D. (2014). 5 Reasons for Records Management. *aiim community*.

Smith, T. (2016). *SharePoint 2016 User's Guide: Learning Microsoft's Business Collaboration Platform, Fifth Edition.* Apress.