Salesforce and HPE Records Management
Terry Humphris, CEO, FuseIT

About FuseIT

Fuse Information Technologies Ltd (FuseIT) offer a range of scalable, flexible, and affordable software integration solutions to enterprises and Government agencies. Globally, the clever use of integration products to unify best-of-breed systems is widely preferred over developing a bespoke product from scratch to solve business problems. FuseIT is one of a handful of companies with enterprise expertise in both Salesforce CRM and Hewlett Packard Enterprise (HPE) Content Manager (formerly TRIM/Records Manager).

Introduction

FuseIT has strong partnerships with Salesforce.com, Hewlett Packard Enterprise (HPE) and Sitecore. This discussion focusses on the benefits of integrating key systems from the first two vendors only.

Salesforce.com is a high-value cloud computing company whose primary offering, [Salesforce](#), is a cloud-based enterprise customer relationship management (CRM) system. CRM applications store prospect and customer information while providing an interface for case and task management, and utilities to automatically route and escalate important events. The Salesforce platform can be easily customized to meet individual business requirements. There is also a multitude of extensions available off the shelf from the [AppExchange](#).

HPE, recently formed after the division of the Hewlett-Packard Company, offers global IT, technology and enterprise products and solutions. HPE's enterprise software, [HPE Content Manager](#), formerly HP TRIM®/Records Manager, is a scalable electronic document and records management system (EDRMS) that helps businesses and agencies meet regulatory compliance requirements and organizational mandates. Critical documents are securely managed according to policy from creation through to disposal.

Records Management

Historically, access to paper-based documents has been managed physically – by lock and key. Complex rules were required for readers wanting to remove the files for an in-depth analysis as this would make them unavailable to other parties. Other "improved" systems still required employees to go through backup tapes, emails, and file servers to satisfy record requests.

The emergence of EDRM systems instantly solved these problems and much more at a fraction of the cost – no need for photocopiers, printers, filing cabinets, access control systems or supervision resources. Document requests are now processed exponentially faster reducing what often took days, down to a few minutes.

Today, where important documents are in electronic form, far more granular control, and protection is now possible. Each phase of a document's life, the creation, management, use, storage, and disposal, can be controlled by roles and individual access rights. More recent EDRM systems automate business processes with workflows and approvals and can be easily integrated with other systems. The current challenges for these systems, and the focus of this discussion are around the ease of use, access and reduction of costs.

Records Management and Salesforce

For superior document use, it makes sense to have the documents available to you immediately, with all permissions respected, in the correct context, and in the application, you are currently using. The concept of separately logging into an EDRM system should be cast into history in much the same way as physical document filing itself.

The next leap in record management is to seamlessly and securely surface key documents on-demand, from multiple devices, *and within the context, they are needed*. Of course, we require system integration to achieve this, and to continue, I will use the two best-of-breed technologies, HPE Content Manager and Salesforce as examples. The T4S integration securely surfaces contextually accurate HPE Content Manager documents as attachments in Salesforce leads or contact records (or any other object for that matter). For example, when dealing with a contact record in Salesforce, the sales team can select an associated file and if suitably privileged, T4S retrieves the document from HPE Content Manager and seamlessly displays it in Salesforce. This achieves transparent and contextual record availability without needing to deal with, or even being aware of, the records management system.

Consider ease of use! The ability to process information in real time and from multiple devices is a must have in today's digital workplace. According to Gartner, employees "use an average of three different devices in their daily routine, which will increase to five or six devices as technologies such as wearable devices and the Internet of Things (IoT) eventually become "mainstream" (see http://www.gartner.com/newsroom/id/3076817). By design, Salesforce delivers information on-demand and from multiple devices so the integration with HPE Content Manager provides the sales team with access to documents normally encapsulated in the records management system. The increased access to important documents does not come at the cost of security which is reinforced by imposing an additional layer of Salesforce authentication.

Integration makes sense for data quality as well. Until recent times, EDRM documents were trapped behind corporate firewalls or in cloud provider environments. Data synchronization, polling and ETL processes were used to make the data more accessible but these created unwanted duplicate records in silos. The technically correct approach, to ensure the data is likely to be complete, relevant, accurate, timely, and accessible, is to store it in a single source of truth. This is the primary goal of any good data architect and achievable, by several means, including simply "getting" the information on demand from the single data source. In creating the Salesforce integration, it was important, therefore, to enable HPE Content Manager to be the single source of truth, and provide a number of other synchronization options that a business may require. This also satisfies any regulatory need for the documents to remain onshore.

Cloud Based Records Management

Although HPE Content Manager has been traditionally installed on premise, it is equally possible to deploy and use the EDRMS software in a cloud environment. Cloud infrastructures come in two basic forms, 'private cloud', where companies manage the EDRMS software and associated records entirely themselves, and 'managed cloud' where companies like FuseIT take care of the administration of the instance. This includes scalability, software updates, disaster recovery and more.

With both private and managed clouds, businesses gain improved access, functionality, performance and ease of data sharing with other systems. Any device can be used to securely access records from any location at a lower cost than with an on-premise solution. Deploying EDRMS to the cloud is the most effective way to reduce ongoing costs, for example;

- Reduced in-house hardware and upgrade costs
- Reduced in-house system administration costs
- Predictable and consistent billing – no capital expenditure

One of the opportunities that cloud hosting also presents is 'co-hosting'. Almost all EDRM systems, including HPE Content Manager, are licensed using a tiered pricing model so larger organizations have lower costs per user. EDRM systems have powerful multi-jurisdiction features that make it possible to segregate data collections from difference agencies in a single instance and accrue the benefits of volume discount per-user licensing i.e. the more licenses purchased, the lower the cost per user. Cloud Based Records Management provides agencies the ability to manage records in an efficient, uniform manner and save money on storage costs.

For all three environments, on-premise, private and managed cloud, the FuseIT integration solution uses Salesforce as the end user portal and for many users removes the need to access the record management system altogether.

Salesforce Failover

Enterprises and agencies that manage important documents such that they require administration using an EDRMS typically also have vital information stored against records in Salesforce. These records become inaccessible if the Salesforce service is disrupted. One solution for this potential disaster is to surface a snapshot of the Salesforce data in a cloud or on-premise web portal. This makes it possible for enterprises to continue their daily business largely uninterrupted during any outages.

The SDDMS solution from FuseIT focusses purely on making some or all, the Salesforce records available to ensure operational continuance during an adverse event. The system uses independent authentication mechanisms to ensure complete separation from any impacted technologies. The Salesforce records are moved to the failover portal via a fully automated process that begins with a scheduled data export to a SQL Server database. The database record relationships are fully honoured so it is possible to run SQL Reporting Services against the database instance, or even expose the data via a web or RESTful service. Once the database has been auto-populated from Salesforce a dynamic process creates a simple website, with search

capabilities, that users can access via their login to view the records and attachments from the configured Salesforce entities.

While this solution makes the Salesforce data accessible in a disaster, the ability to access HPE RM hosted documents is determined by where the EDRMS is hosted (on premise or cloud based) and the availability of the network service to that environment. Accessing EDRMS records that are not stored in Salesforce may be possible using other features of HPE RM like WebDrawer.

Conclusion

This discussion suggests the next leap in record management is to surface important documents in their correct context and within the environment, they are used. This turns out to be very rewarding for users and achievable with EDRMS integrations such as to Salesforce, which makes the rigors of discrete document management for the majority of users, go away. This "disappearing" of the EDRMS, comes at little expense and presents a number of new opportunities such as improved security, data sharing, and Salesforce backup.

For more information about FuseIT, or a demo of how this works please contact us at info@fuseit.com.