

This new company was able to organize its assets, systems, and workflows in record time.

Spun-off Company Achieves Quick Success with Gimmel and SharePoint

Industry

Retail

Customer

This Fuel and Convenience Retailer is the second-largest publicly traded fuel and convenience retailer in North America, with over 12,000 employees with 1,900 retail outlets in the U.S. and Canada.

Technologies Employed

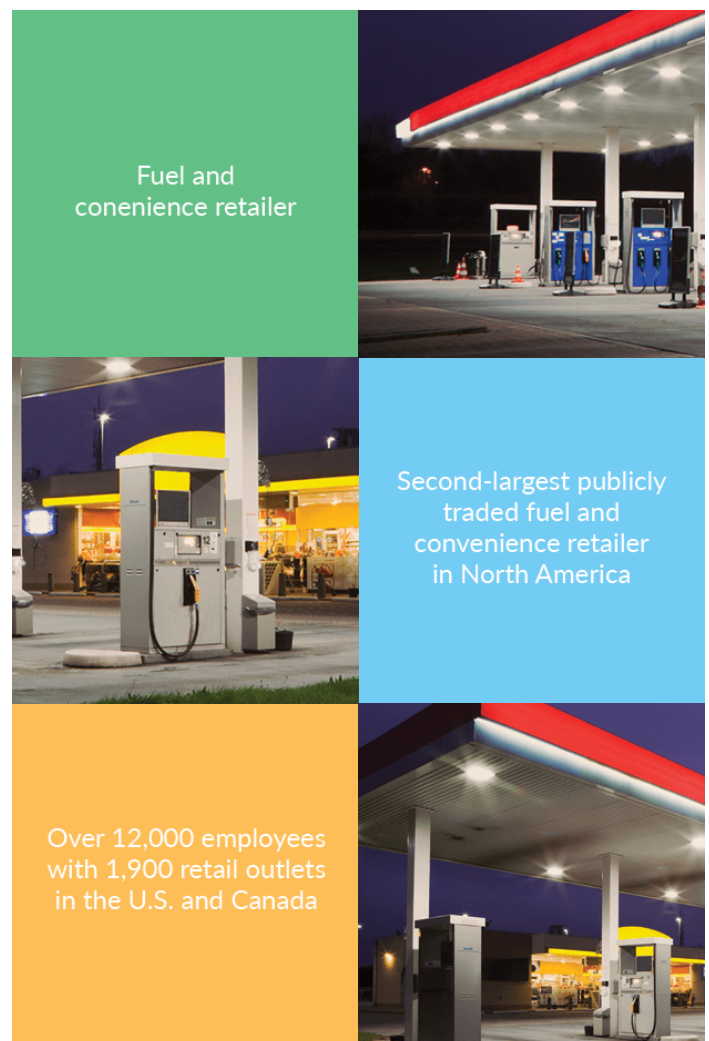
Gimmel Records, Gimmel Link

Challenges

- Build new IT infrastructure after divestiture from parent company
- Reduce high cost of departments automated on different legacy ECM platforms
- Support the HR needs of thousands of retail stores
- Negate risk of lacking a means of ensuring regulatory compliance

Results

- Replaced outdated FileNet system with lower cost, higher-functionality SharePoint-based platform
- Removed high-maintenance OpenText SAP integration in favor of high-performance Gimmel Accounts Payable solution
- Reduced risk as employee, capital, vendor and receipt records are managed in SharePoint in accordance with regulatory stipulations



Background

When a prominent energy company decided it needed to focus on its refining operations, it divested its retail holdings. The parent company had used FileNet as the Enterprise Content Management (ECM) system of record, and OpenText VIM as its Accounts Payable (AP) solution. Neither system fit the goals of the new company, as they were unjustifiably costly and considerably outdated.

This new organization was responsible to 12,000 employees and managed 1,900 retail outlets across the U.S and Canada, but had no IT infrastructure in place to carry out that task. The new company had to build an entirely new IT infrastructure from scratch, and faced considerable vulnerability throughout the lengthy process.

The members of the organization were familiar with SharePoint, and believed it to be a ready replacement for FileNet. They retained SAP and SharePoint as the ERP system and content repository for the new organization. It would at least be a good place to start.

And then they approached Gimmel to help them achieve their vision.

Solution

Gimmel had a lot of ideas to help the fuel and convenience retailer cover all their IT infrastructure bases. They rapidly implemented a solution that worked to establish SharePoint as the organization's IT nexus, and the organization soon learned that in addition to storing enterprise content, SharePoint could be leveraged to do much more.

To govern the SharePoint environment by controlling site creation, lifecycle, and records retention, Gimmel implemented Gimmel Records. Gimmel Link was employed to manage content from the AP function in SAP. With Gimmel Link, purchase orders, invoices and supporting documents can be easily scanned to a SharePoint library, and using the ArchiveLink "early archive" function, create the appropriate AP transactions in SAP.

From here, SAP workflows were surfaced inside of SharePoint to help resolve exceptions. As metadata was added to the process, Gimmel Link synchronized the information to SharePoint.

Now, when an invoice is paid, Gimmel Records facilitates the movement of the document content to the records center. Retention and disposition actions are set based on the SAP metadata and corporate retention schedule, finishing the process.

SharePoint was also employed to help manage HR documents as a full employee file, alongside the organization's cloudbased HR system. These records are fully secured, accessible by HR and can readily be produced to legal authorities when mandated.

Gimmel also enables SharePoint to be the repository for a wide variety of other business documents. Store merchandise invoices received from jobbers receive the same retention as invoices paid in SAP. Capital expenditures are also documented within SharePoint and linked to SAP. Other applications, including content from vendor-related information to delivery tickets, are now managed in a well-governed SharePoint environment.

Software and Services Used

- **Gimmel Records** to allow the organization to meet their requirements for record keeping in SharePoint with employee records, and other regulated content
- Gimmel Link to integrate SAP® AP documents with SharePoint

- Gimmel allows you to control how SharePoint sites are created in the enterprise, and to deliver uniformity and ease of use
- Gimmel SharePoint Services to rapidly design, build and deliver a new SharePoint based upon best practices
- Third party capture tools to acquire documents and to process AP transactions in SAP
- Gimmel Compliance consulting and research to develop records retention schedule for U.S. and Canada

Results

Now, the organization has a modern, well-governed platform for enterprise content. By eliminating FileNet for content archiving and replacing OpenText VIM for SAP AP processing, it was able to lower costs and improve efficiency and agility. An integrated Gimmel-governed SharePoint system acts as the enterprise content repository for the organization lowering training costs and greatly expanding the accessibility of content management to nearly any employee in the organization. The Gimmel platform allows SharePoint meet the content compliance needs of the company, lowering exposure to legal risk by ensuring that similar content is retained and disposed according to the same rules.