

# Success Story

## Open Text Helps Clean Up Unilever's Records Management Program

### Open Text delivers a single solution to serve all aspects of records management

With revenues of €40 billion in 2007 and employee numbers nearing 180,000, Unilever is one of the largest consumer goods companies in the world. In 2007 it realised the need to further develop its Records Management solution from Open Text, which was initially introduced in 2004. The main purpose was to help the Records Management Departments in Unilever's dual Corporate Centre manage the mountains of physical files they receive on a daily basis. Phase II of the project would have two objectives: to manage electronic records in the same way as physical ones, and to give users access to their own records.

#### Business Need

On average Unilever sells 150 million items per day in over 148 countries. With such a vast and extensive product line it is crucial that the organisation can share and access information with ease. This was one of the main reasons for sourcing a new records management solution that would work across its Corporate Centre in the UK and the Netherlands.

"The implementation of phase II of the project will lead to a more consistent approach for filing of electronic company records subject to formal records retention policies and requirements. Phase II is aimed at introducing a structured method of transferring the electronic records currently residing on personal drives or shared departmental drives to Records Management. Ultimately, it should lead to a reduction of storage space now occupied by departments and staff on file servers, which will allow greater ease of records transfer to Open Text RM and contribute to new ways of working."

*Duncan Haughey, Project Manager  
Global Communications Unilever*

Consequently it was crucial for the UK's RM team to be able to perform fast and accurate retrievals at file level, instead of box level, as was the case with their previous legacy system, Microsoft Access®. Furthermore they required a solution that could manage box locations within the same system in order to gain complete intellectual control.

In the Netherlands the aim was to replace the current plethora of Lotus Notes and Access databases with one integrated system to be able to manage both physical and electronic documents in the same consistent manner, as well as to replace the existing space management and loans systems.

Unilever's large array of physical files and boxes meant the time taken to find and then eventually access each file was becoming unmanageable. Whilst the contents of the boxes were recorded in Access, physical locations and loans were recorded in spreadsheets. This meant RM staff had to search and input information into more than one database. The current system was also vulnerable to human error, as staff could transcribe data incorrectly as they moved between databases.

The impetus for the UK implementation of the first phase of the Open Text Records Management system was the reduction of paper file storage within Unilever's recently refurbished headquarters. The departments were allowed far less storage for files per head than they previously had. To solve this problem the Records Management (RM) team worked with the specific departments to implement improved document management procedures.

#### Industry

Consumer Goods

#### Customer



#### Business Challenges

- The need to reduce paper file storage
- The need to perform fast and accurate retrievals at file level, instead of box level
- The need to better share information across the two sites

#### Business Solution

- Open Text Records Management

#### Business Benefits

- Day-to-day administration times have been reduced considerably
- The system has been particularly useful for loans administrations, specifically when staff are chasing overdue notices
- Unilever has been able to cut costs and improve rates of efficiency and effectiveness

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Ideally Unilever wanted an electronic system that would be able to monitor the physical files and boxes. They wanted a hosted solution that could manage the retention and loan of records at the same time as allowing staff to access exact file and box locations online at their desk as opposed to traipsing around a warehouse.

Previously both sites had used a mixture of Lotus Notes and Access databases, both of which had their limitations. Staff were frustrated by the fact they were constantly being asked to switch between the two systems. The situation was made worse by the fact that the two sites in London and Rotterdam were using different procedures and processes.

Essentially there was very little or no uniformity when it came to the management and sharing of information across the two sites, there were far too many physical files and the lack of digitisation was seriously affecting organisational efficiency. Having achieved this as part of the initial implementation of the Open Text system, the RM teams wished to develop the system further to be able to manage electronic records in the same manner as physical ones and also be able to grant their clients access to their own records.

## Business Solution

Following a rigorous procurement process in 2007, Unilever selected Open Text Records Management for Phase II of the project. One of the critical factors for its selection was the system's ability to deliver a single solution that could cover all aspects of records management at the right level of maturity. The solution's key features included the ability to digitalise physical documents and boxes by bar coding them, so that when they were scanned the user could see exactly where the relevant box, and more importantly, exact files, were stored.

Furthermore, the system fulfilled Unilever's desire for a fully hosted and managed solution that enabled the user to take advantage of the latest versions of software and also helped the company meet compliance regulation ISO 15489 for Records Management.

Following the initial selection, Unilever sourced the relevant hardware needed for bar coding and embarked on a mass migration process removing the data from its legacy systems to Open Text RM. On completion, training and consultancy took place, which was followed by testing and the first phase of the launch in October 2008.

The full implementation of the pilot roll-out was relatively smooth and took just under three months. Following the implementation comprehensive training and support was provided for all users. The pilot users were enthusiastic from the start and soon realised the benefits of the solution and it was not long before the majority were using it with ease.

The aim is for the solution to eventually serve all the departments at Unilever's Corporate Centre (HQ) in London and Rotterdam. Ultimately they expect to have 200 users, including both Records Managers and Departmental Records Officers.

## The Results

Since the solution was installed in January, day-to-day administration times have been reduced considerably. The system has been particularly useful for loans administrations, specifically when staff are chasing overdue notices.

The benefits of bar coding items and boxes has provided not only a foolproof audit trail, but has also allowed for improved intellectual control and monitoring. Staff are now able to locate, scan and process items much quicker. Similarly once items are returned they can be processed far more efficiently. Overall the new solution has delivered a better working environment.

By refining procedures and using one system, as opposed to different databases and spreadsheets, Unilever has been able to cut costs and improve rates of efficiency and effectiveness. Also, reports in the system allow them to thoroughly check for accuracy, which was not possible with their previous Access system.

Also key to the project was Open Text's ability to offer hosting and as a result Unilever have been able to deploy the solution faster, take advantage of Open Text's expertise and deliver a scalable solution, which can grow with the business.

Furthermore, Phase II will allow them to look in depth at some remaining procedures (e.g. review) and extend the benefits of using Open Text RM to all aspects of their day-to-day administration.

Duncan Haughey, Project Manager Global Communications Unilever commented: "Currently we are in the process of delivering phase II of the project. The implementation of this phase will lead to a more consistent approach for filing of electronic company records subject to formal records retention policies and requirements. Phase II is aimed at introducing a structured method of transferring the electronic records currently residing on personal drives or shared departmental drives to Records Management. Ultimately, it should lead to a reduction of storage space now occupied by departments and staff on file servers, which will allow greater ease of records transfer to Open Text RM and contribute to new ways of working.

"Because the records will be held in a controlled environment it will help ensure that essential business records that are created electronically are managed throughout their life cycle. The greatest benefit to our end users in this phase will be a self-service system where they can submit material, review their own holdings, request loans and return loans easily," concluded Haughey.

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