Fastman Permissions Manager for Outlook Case Study

With many companies advising their users not to send managed documents as attachments to emails, how is it possible to ensure that recipients have access to the content they are being sent? The Belgian Nuclear Research Center found the solution through Fastman.

SCK•CEN, better known as the Belgian Nuclear Research Centre, is one of the largest research institutions in Belgium. For over 60 years their 700 employees have worked on the development of peaceful industrial and medical applications of ionizing radiation. Their developments have resulted in a long list of innovative applications for the medical world, industry and the energy sector.

Information security is essential

With scientists working on both valuable intellectual property and personnel handling highly radioactive materials such as radioactive Uranium on a daily basis, safeguarding the confidentiality, availability and integrity of the information they generate is as important as the security of the physical sites on which they operate. For that reason most of their documentation is confidential in nature and available to individuals on a “need to know” basis only.

As an OpenText Content Server customer, SCK•CEN has configured permissions within their repository to mirror this highly restrictive access requirement. They use many different access groups and “Template Workspace” roles, and users are not able to modify permissions on content themselves.

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In order to avoid having uncontrolled copies of information, SCK•CEN encourages their users not to attach documents to emails but to use Content Server URL links instead. “We want our users to send the person to the document, and not the document to the person,” said Pieter Jan Hermans, Enterprise Content Management Analyst at SCK•CEN. Using this approach SCK•CEN is better able to control who receives what, users can benefit of the document management functions of content server, and the mail servers do not become clogged with unnecessary file attachments.

“The only trouble was that we ended up getting dozens of Helpdesk complaints from users telling us that they were regularly receiving error messages”, Pieter Jan went on to say. “When we looked into this it wasn’t actual errors, it was mostly because users didn’t have permission to access the files they were being sent”. Senders of the links could consult the permissions using Fastman Permissions Manager but this was considered not efficient and too complex.

End-user experience was becoming an issue and this needed to be addressed.

A better end-user experience

As they were already working with another OpenText services partner SCK•CEN considered options such as WebReports or developing a custom built Content Server module to allow users to examine the effective permissions of any recipient, but they felt that these options moved users away from the standard user interface that they would always be using when sending mails - Microsoft Outlook.

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“User experience is a key element of our ECM strategy”, said Pieter Jan. “We believe we should adapt the technology to the way people work, and not the other way around”.

“I have a dream …”

To look for a solution to the problem Pieter Jan turned to OpenText’s customer Knowledge Center. “I have a dream,” he posted, “about a function that we would be able to add to Outlook, that can verify if all internal recipients have access to the links within an email”.

“One of our guys spotted this and forwarded it to me”, said Alister Grigg, CEO at Fastman. “We’ve already got something that can do most of this!”

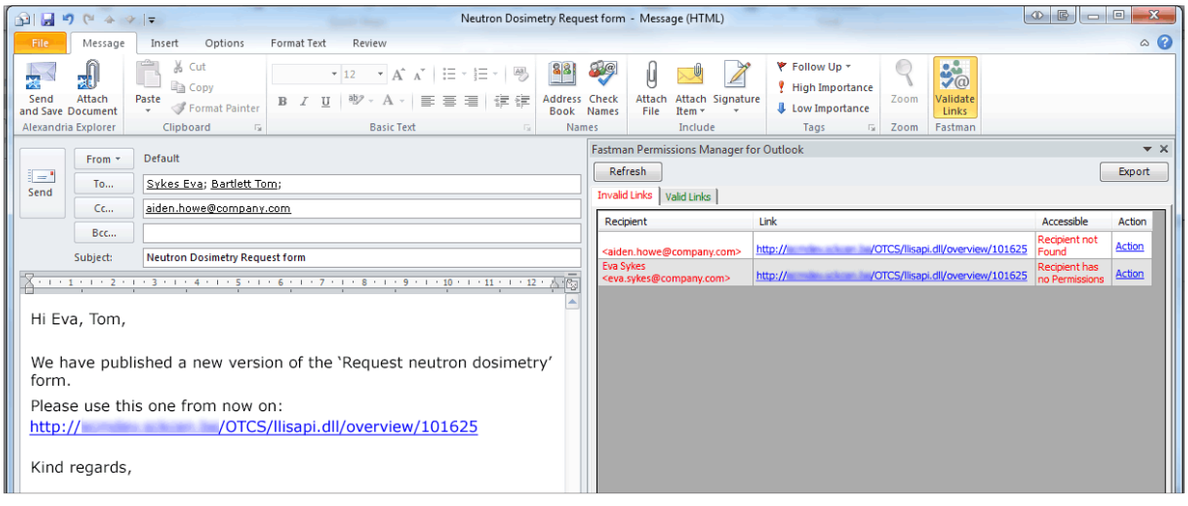
As SCK•CEN was already an existing Fastman client, Alister reached out to Pieter Jan and a discussion started on how this idea could be realized. Rather than creating a tailored solution for SCK•CEN, they opted for building an extension on their existing Permission Manager module. The ECM project group within SCK•CEN presented the Fastman solution to their CEO and a decision was made to move forward with the project.

Permissions management within MS Outlook

Permissions Manager for Outlook ties in with SCK•CEN existing desktop applications. It provides them with a simple and intuitive interface to verify Content Server permissions directly within Outlook. In particular, their users are able to verify whether any individual recipient has effective permissions to access content whether or not they have “Edit Permissions” rights on that content.

For simplicity users can manually type links, or they can copy them from any other source such as the ‘Email Link’ option from Content Server. Once they have entered the email addresses of the recipients within the To:, CC:, or BCC: fields of the email, a simple click on a “Validate Links” button checks all links and provides a detailed permission overview report.

With this information SCK•CEN‘s users can now make educated decisions around who they send the content to and take actions to resolve any issues, including requesting changes to permissions.

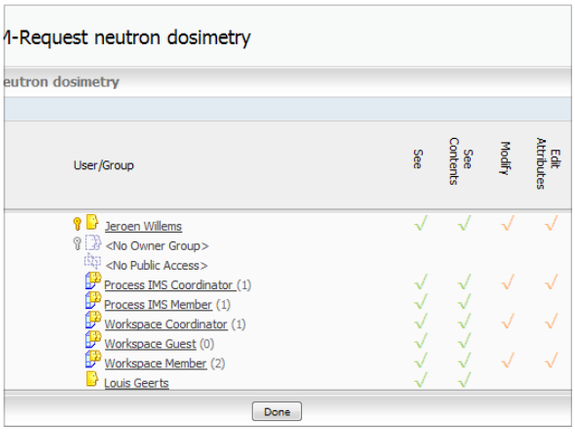


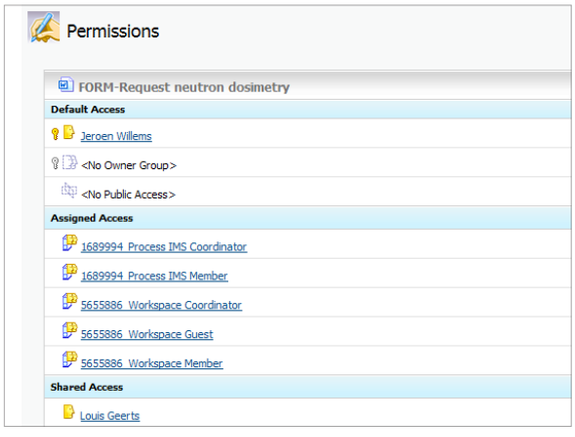
Keeping it simple meant increased user adoption

After a successful development and beta testing together with Fastman, SCK•CEN is now in the process of rolling out Permissions Manager for Outlook to the whole of their 700 strong Content Server user base.

The user acceptance has been exceptional and the number of IT support tickets being raised has fallen substantially. This has meant that SCK•CEN is able to benefit not only from better adoption of their overall Content Server deployment, but also from the material savings in Helpdesk support costs.

“We are glad we used Fastman to implement this they are very professional and already knew the area extremely well. The whole project went incredibly smoothly” said Pieter Jan, “Permissions management and Fastman – they know that better than anyone!”





To find out more about
Permissions Manager for Outlook
please visit http://www.fastman.com

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