

How a Global Leader in Oil Exploration and Production Streamlined Their Records and Information Governance Program

Case Study

“I’ve used Versatile since 1993 and cannot imagine performing my daily responsibilities without the product. Whenever I have questions, I can rely on the outstanding services offered by the Zasio Enterprises support group.”

- Records Retention Coordinator

Background

The featured company works across a variety of industries from oil and gas, power, and refining, to real estate, ranching, and infrastructure. Therefore, they needed to find a solution to help them create a records and information management program capable of managing their records and retention with the same scope and flexibility as their business.

Creating a Digital Records Management Program

In 1991, there was no solution in place to manage the lifecycle of records at the company. Those working on the records team weren’t using barcodes, and their recordkeeping procedures were almost entirely manual. In fact, they used handwritten ledgers which made it difficult to manage and maintain records held in secondary storage. They wanted to change that; they wanted to create a records management program that could centralize their program and make it easier to manage. The thought of continuing with their paper-based system was out of the question. With that in mind, they reached out to Zasio to find a comprehensive solution.

Finding the Right Solution in Zasio’s Suite of Versatile Products

In 1993, after working with Zasio, the company chose to implement Versatile for Windows, an early-generation Versatile program that could solve all of the company’s needs. Zasio’s sales team and support staff worked with the company to install the program, migrate all of their legacy data into the software, and train their employees on best practices with the software and records management programs.

The company was so impressed with Zasio’s software that they decided to maintain their partnership with Zasio for over 25 years. Over the years, they’ve implemented Zasio products as technology changed, upgrading to Versatile Enterprise and then again to Versatile Enterprise LE.

Results

The use of Versatile has made the company’s entire records management process a highly productive and progressively functional activity for both active and secondary records achieving the following results:

- A 25-year partnership including three different versions of Versatile Records Management software

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ZASIO

- Consolidated physical records from five warehouse locations down to one
- Offered the company the ability to implement barcode technology, manage inventory, track movement of records, search centrally, generate reports, and maintain record metadata.
- Allowed the company to manage the “creation to destruction” lifecycle of their records in a single database.
- Migrated 40,000 records into Versatile Enterprise LE to help manage 750 legal clients on top of all of their electronic and physical records.

About Zasio

Zasio has over three decades of service in Information Governance. We focus on one thing, helping businesses not only get started in records management but maintain top-of-the-line Information Governance (IG) programs. Since we started in the industry, we’ve recruited a team of experts, including software developers and technicians, attorneys, analysts, Certified Records Managers (CRMs), Information Governance Professionals (IGPs), and Certified Information Privacy Professionals (CIPPs)—all in-house—who not only keep up with evolving IG trends, but who can also scale our Versatile solutions to meet the demands of both customers new to records management and seasoned veterans. It’s no wonder why thousands of companies, including half of the top 20 Fortune 500, have trusted our software solutions and expert consulting services to implement world-class Information Governance programs.