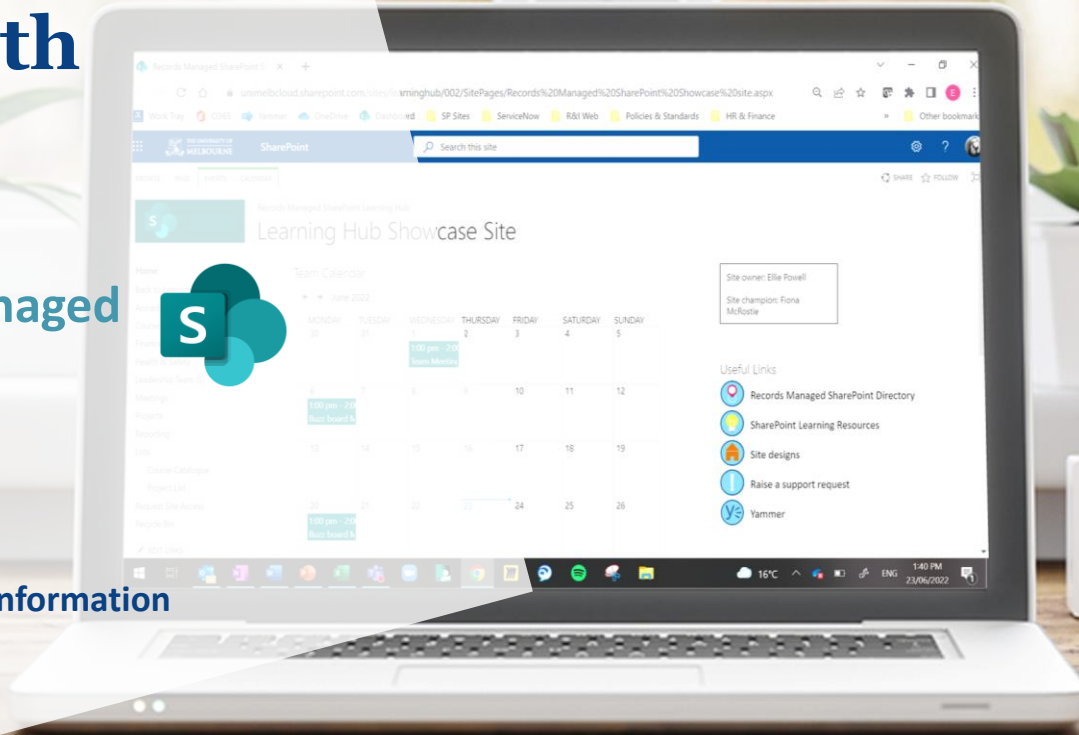




# The Best of Both Worlds

Delivering a Records Managed SharePoint Solution

Ellie Powell | Manager, Records & Information  
The University of Melbourne



# Overview





# Background

2016

- The University of Melbourne embarked on the expansion of the University's Electronic Document and Records Management System (EDRMS), Content Manager



# Background



2016



GOAL

Our goal:

- Increase records management capability and compliance across the University
- Introduce a solution for the customer which is both compliant and user friendly

# Background

2016

GOAL



- Challenges were encountered with the uptake of Content Manager in its early rollout
- Office 365 was made available to University staff in parallel

# Background

2016

GOAL

Challenges ↑

This led to engagement with key stakeholders within the University to produce a solution that:

- Took the strengths of SharePoint Online's ease of use and positive user experience, and
- Complement those with the powerful back-end of recordkeeping compliance that Content Manager provides.

# Background



This led to engagement with key stakeholders within the University to come up with a solution that:

- Took the strengths of SharePoint Online's ease of use and positive user experience, and
- Complement those with the powerful back end of recordkeeping compliance that Content Manager provides.

# Integrated System Solution

SharePoint is the front-end document management tool designed for an improved user experience for staff



University of Melbourne Staff

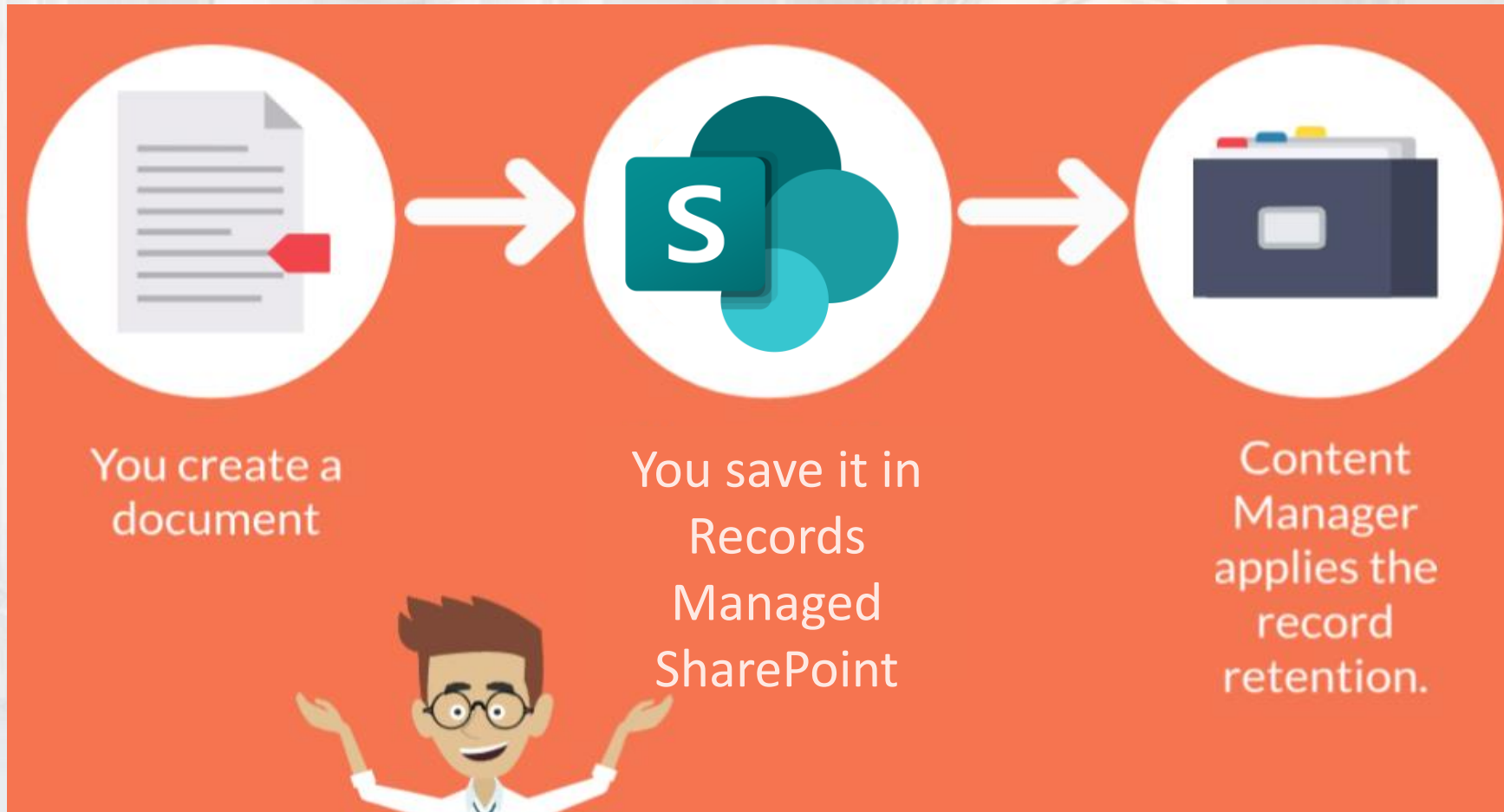
Content Manager is integrated on the back-end and manages record retention and disposal.



Records & Information



# The User Experience





**Engagement & Analysis**



**Design & Development**



**Handover Custodianship**



**Training & Awareness**



**End User Support**



**Retention & Disposal**

The Role of Records  
& Information



# Engagement & Analysis

**Introduce the Records Managed SharePoint solution to the customer**

**Records &  
Information  
(R&I)**

**Partner with the business unit and deliver workshops for requirements gathering**

**Nominate site owner / champion to hand site over to**

**Business Unit**

**Identify core functions and activities of the business and intuitive navigation**

**R&I and  
Business Unit**



# Design & Development

**Template a site design document to capture requirements from analysis**

**Records &  
Information  
(R&I)**

**Based on the functions and activities identified, determine the SharePoint 'libraries' for creation and initial metadata requirements**

**R&I and  
Business Unit**

**Align libraries with the appropriate disposal class from the records Retention & Disposal Authority**

**Create the site and libraries as per the design, with library and folder creation disabled for all site users**

**R&I**

**Provide site owners with the ability to manage library configuration over time**





# Handover Custodianship

**Demonstration and site handover to site owner**

**Records &  
Information**

**Access and permissions management of the site**

**Library configuration maintenance (management of columns and views)**

**Site Owner**

**Local system champion**



# Training & Awareness

**Continuous development of knowledge base articles and video tutorials**

**Monthly classroom training sessions**

**Future e-learning modules to meet various learning preferences and requirements**

**Records &  
Information**



# End User Support

**Response to requests / enquiries received through our ticket management system**

**Creation of newly requested libraries & alignment with RDA**

**Logging and prioritization of continuous improvement opportunities identified**

**Technical issues are escalated to our colleagues in Business Services (IT function)**

**Records &  
Information**

**SharePoint  
Administrator**





# Retention & Disposal

Upon completion of SharePoint Lifecycle, document is mapped to Content Manager

Document lives out legal retention period

Access and retrieval of integrated documents where required

Once time expired, document follows due disposal processes

System

Records &  
Information





**Engagement & Analysis**



**Design & Development**



**Handover Custodianship**



**Training & Awareness**



**End User Support**



**Retention & Disposal**

# Things we've learned...

A project  
and BAU  
overlap

Governing  
select site  
collections

Education of  
site owners

Benefits of  
metadata

**LESSONS**

Less is more

Valuable  
stakeholder  
relationships

**learned**

Investing  
time to save  
time



# Things we've learned...

We're not just system owners...

**Practice  
what  
you  
preach.**

We're system users.







Positive engagement and user experience results in word-of-mouth referrals across business units

Customers proactively seek out the compliant solution offered

Presence of Records & Information as a function gains momentum and awareness within the organisation





Over 1,100 Records  
Managed  
SharePoint Sites  
created by the  
Records Online  
Project and Records  
& Information teams

Over half a million  
objects captured in  
Content Manager by  
the integration tool

52% increase in  
capture of records  
through the  
integration six  
months following  
transition to WFH  
compared to six  
months prior



# Questions?



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# Thank you

## Records Managed SharePoint



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