



Environment Protection Authority Victoria

MARY NEAZOR / 13 August
2024

SharePoint – Conquer Records Chaos

PROV Records Management Network August 2024



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In the beginning

- Office365 introduced to EPA around 2013/14, via IT
- No governance or designated team responsible for implementation
- Some users enthusiastic and began to explore new software
- Others continued to use physical records or store documents in network drives
- Whether records physical or online, no controlling principles e.g. naming conventions

Information management arrives

- **Mid-2017:** Information Management team set up in IT Division
 - ✓ Staff numbers have varied from 5 to 1.5
- Developed **Information Management Framework**, including:
 - ✓ Updated Retention and Disposal Authority
 - ✓ Business Classification Scheme
 - ✓ Enterprise taxonomy



Information Management Platform

- *Directive:* Any EDRMS must manage records in SharePoint
- **2018:** EPA chooses Records365 (RecordPoint)
- Concept of **Information Management Platform:** SharePoint sites in which records are managed by Records365
- (Not all EPA SharePoint sites are records managed)

Site categories

Function site

- Content focused on single business function, project or program
- Several Function sites may be linked to one Administrative site, or to each other
- Libraries for records of function, project or program
- Access according to staff roles e.g. read only, edit etc
- Managed access for all staff

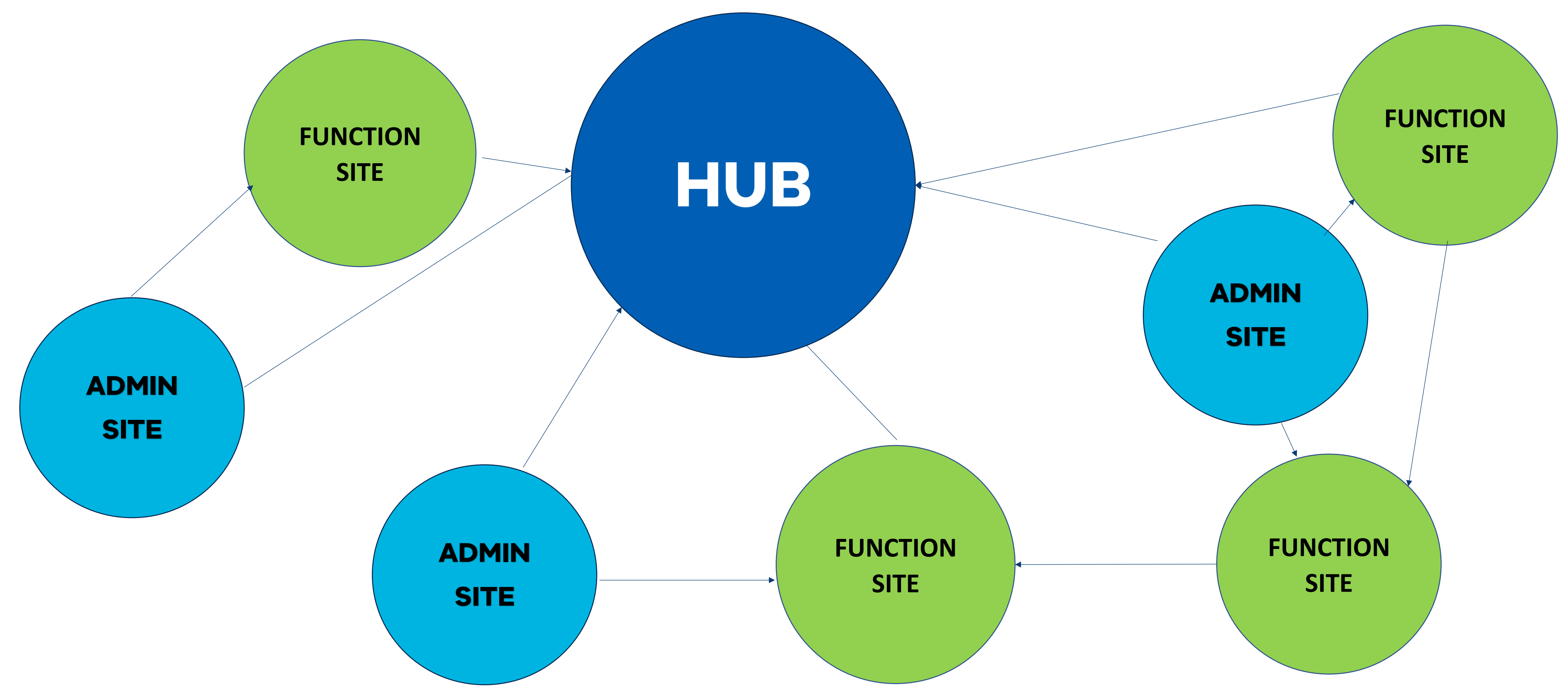
Administrative site

- Based on EPA's organisational structure
- One site per team
- Links to team's Function site(s)
- Content: internal administrative records or items of common interest e.g. Standard Operating Procedures
- May include libraries with restricted access



Hub

- At Division or very broad functional level
- Acts as "shop window"
- No records **stored** on Hub – links only
- Space for news and announcements
- Links to Function and Administrative sites
- Visually clear, easy to navigate
- Usually readable by all staff

The IMP / SharePoint necklace



Fast and furious

In early 2019, EPA began 2 ½ years of intensive business transformation across all aspects and parts of the business,  supported by... an equally intense digital transformation. 

Everyone was running at full speed simply to stay in one place.

A BAU rollout of the Platform wasn't possible.

Beginning

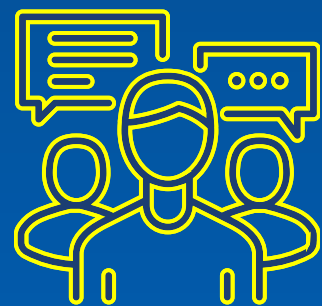
- SOP begins with approach from or to business unit or project team
- **First step:** Identify and engage with:
 - ✓ The business owner
 - ✓ A local champion or champions

Giving stakeholders a stake (1)

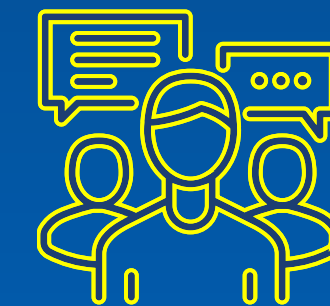
With manager's support and local champion leading, engage whole team

Popular favourites:

- Planning the site(s) – names, document libraries, document sets
- **Metadata**
 - ✓ Naming conventions
 - ✓ Key metadata fields (no more than 3) for location and retrieval



Co-design by stealth



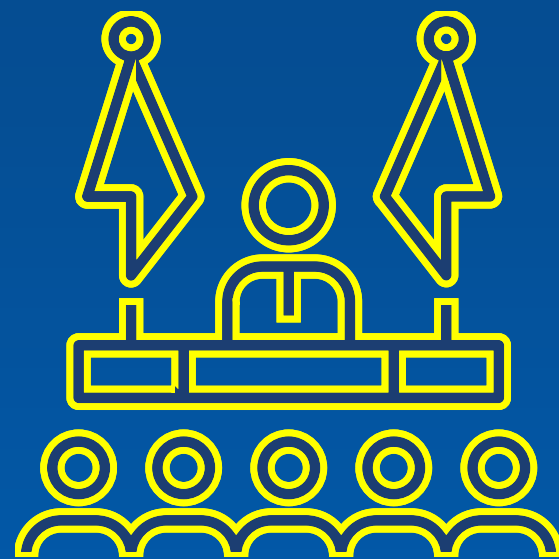
Giving stakeholders a stake (2)

EPA's Records Management Policy defines records as "evidence of business" .

- Team discussions on records often become de facto business analysis sessions – which then feed back into decisions on keeping records

Help & support - Information Management Platform

- Showcase good examples from other teams (with consent)
- Could start a Community of Practice
- Peer to peer discussion vs the business talking only to Information Management – who may be over-specialised



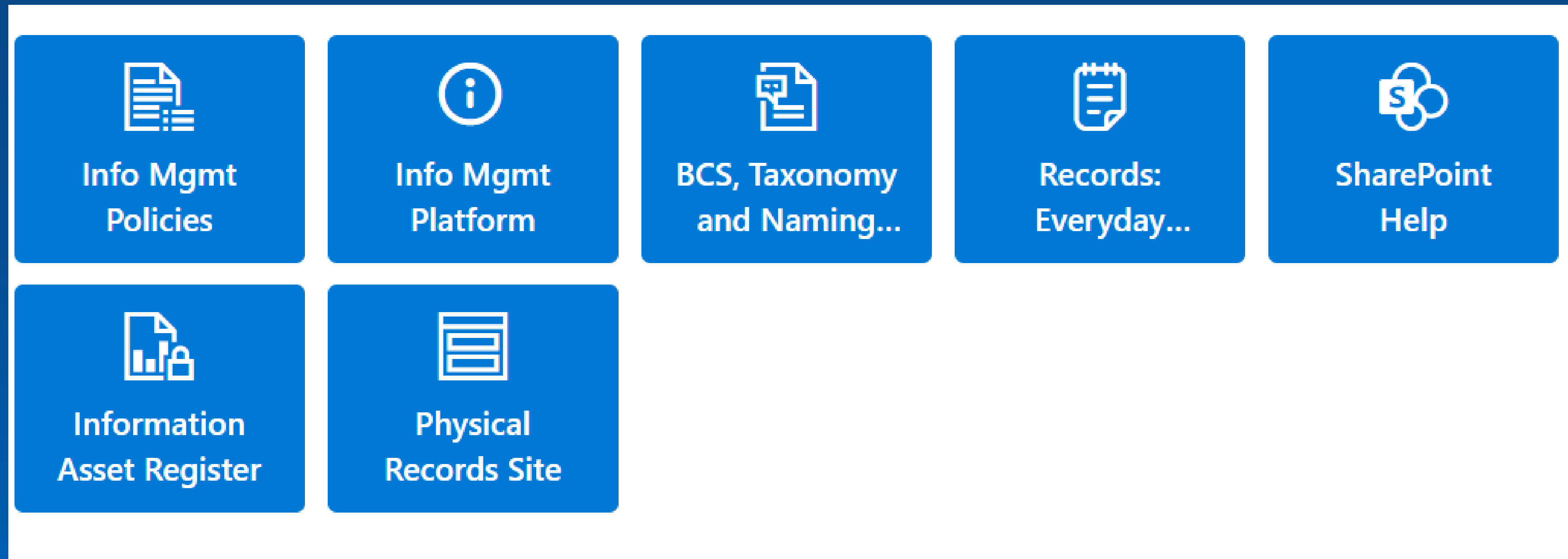
VS



Help & support – SharePoint (1)

What if business users just aren't comfortable with SharePoint?

EPA's Information Management Support site major topics



Help & support – SharePoint (2)

SharePoint training topics – by popular request:

Guidance Index - Click on one of the links below to go to the section

[How do I get to SharePoint?](#) | [Search](#) | [Views](#)

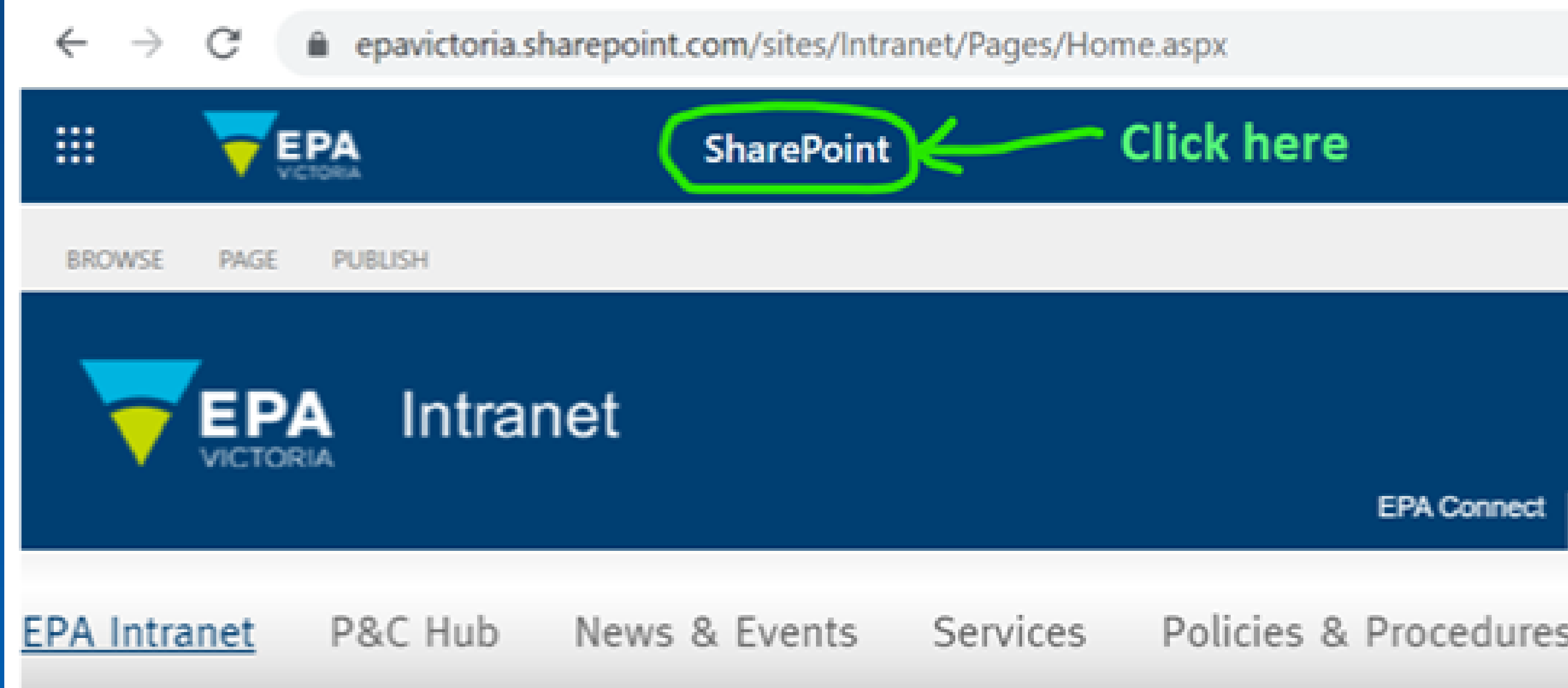
[Working with Documents in SharePoint](#)

- [Create a new file in a document library](#)
- [Creating a new record/document in SharePoint](#)
- [Renaming documents in SharePoint](#)
- [Retrieving deleted documents from the recycle bin](#)
- [How to move documents between SharePoint sites \(Video\)](#)
- [Moving a record/document from OneDrive to SharePoint](#)
- [Upload files and folders to a library](#)
- [Saving email and email attachments to SharePoint](#)
- [Saving pictures directly into SharePoint](#)
- [File-Save-As directly into SharePoint](#)

Help & support – SharePoint (3)

There's no such thing as a stupid question...

To access SharePoint, simply click on the SharePoint logo (highlighted in green in the screenshot below).



Information Management – BFFs

EPA's Public Affairs Branch: responsible for internet, intranet, e-newsletters and internal chats

- Information Management asks PAB to review important communications and articles to:
 - ✓ Eliminate professional jargon
 - ✓ Make sure the message is relevant to target audience
 - ✓ Make language vivid and active

Information Management – The 3 amigos

Information Security – Privacy

How open, transparent and accessible should information / records / data be?

Full, frank and free discussion ensues....

BUT

All three teams work closely and supportively together to:

- ✓ Ensure the business has a 360° view
- ✓ Minimise risks, gaps and loopholes

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Questions?

