

Delivering Recordkeeping Projects in Collaboration with Business and ICT professionals

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Records Managers Forum 8/11/2010

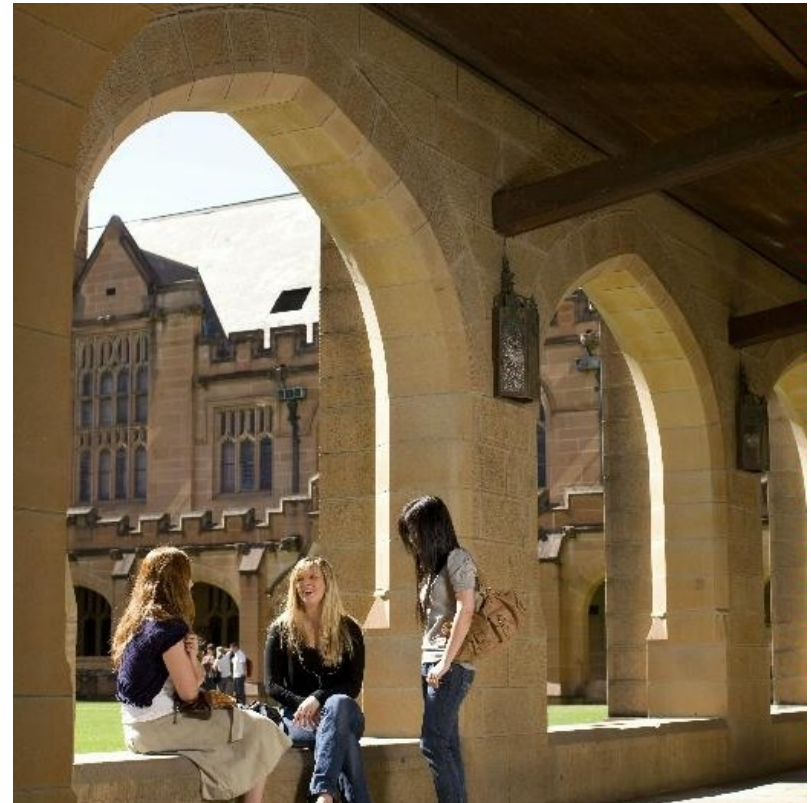


OVERVIEW OF THE UNIVERSITY OF SYDNEY



- **Australia's first university founded in 1850 with 100 students**
- **Ranked in the top 40 Universities globally**
- **7,585 full time equivalent staff**
- **49,000 approx full time equivalent enrolled students**

- **1,500 servers & 600Tb storage**
- **400,000 emails daily**
- **20,000 computers**



- Office of General Counsel – Group Secretary – Archives and Records Management Services
 - 11.6 full time equivalent Records staff
 - Manage all official records - Administrative/Student/Staff
 - 3,500 shms of files storage capacity on site
 - 200 shms of paper files created each year (2008/9 figures)
 - 28,000 paper files created, and 32,000 destroyed each year (2008/9 figures)
 - Over 2000 files created each week: approx 30% paper, 70% electronic
 - TRIM 6.2.2 (first implementation in 2000) manages over 3.8 million objects
 - Used by 2,700 users
 - 6,500 TRIM licences, 5,500 of which acquired in Feb 2008
 - On average 14,500 electronic documents captured into TRIM each week (626,284 as at 31/10/2010)
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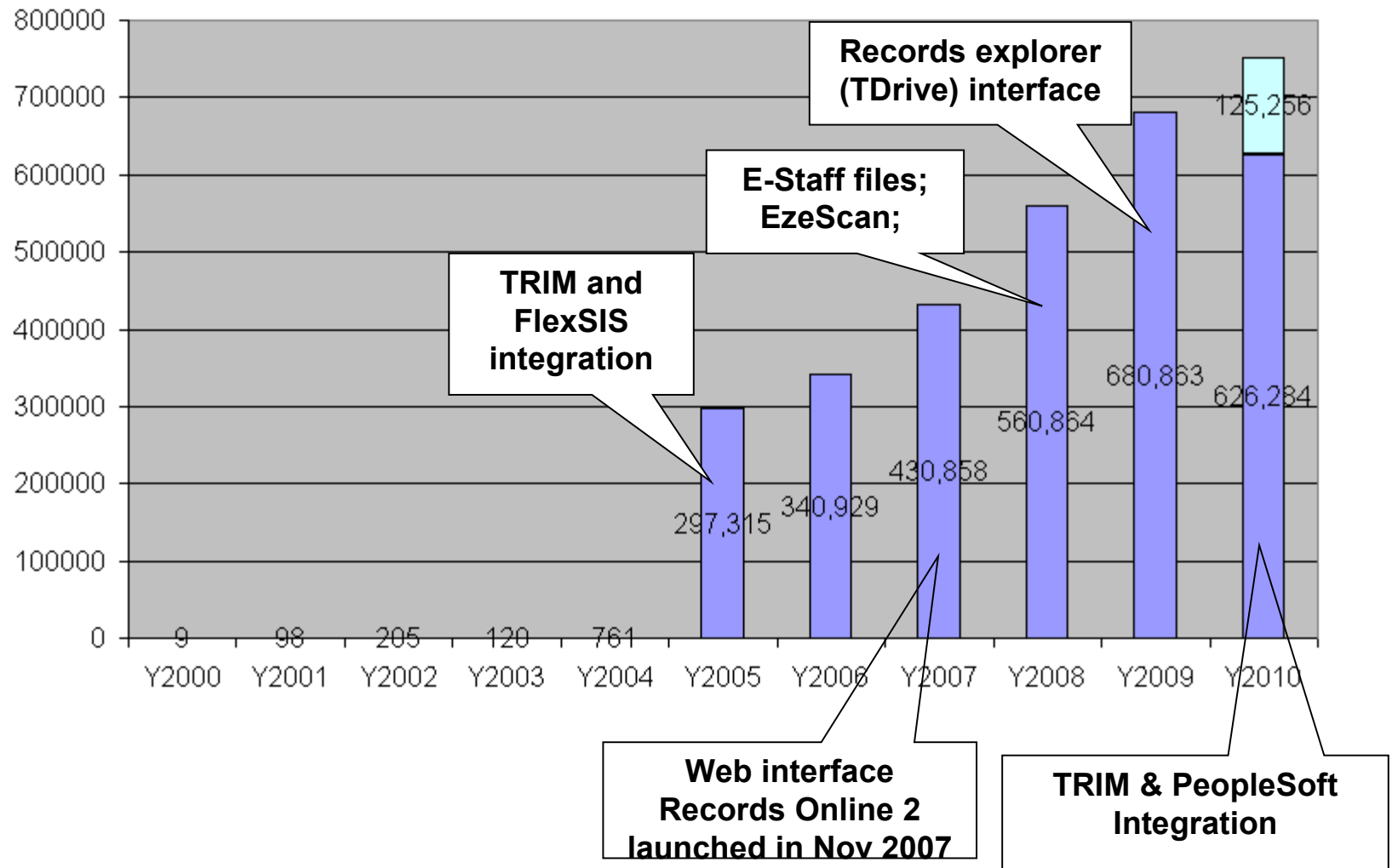
Out of Box Solutions:

- Records Online - web interface to TRIM
- Email add-on
- Records Explorer (TDrive)
- Web interface to TRIM workflow component

Integration and Other Applications

- FlexSIS (student administration system)
 - PeopleSoft (financial management system)
 - Ezescan
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Electronic Documents created from Jan 2000 to October 2010



Definite:

- ❖ TRIM7 upgrade by end of Feb 2011
- ❖ TRIM7 & SharePoint 2010 integration
- ❖ TRIM and new student system integration going live

Possible:

- ❖ Integration with Talent2 (payroll system)
 - ❖ Integration with InCite2 (project management)
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Central ICT Staff



External Developers



TRIM Administrators



Departmental ICT Staff



Central ICT Staff



External Developers



TRIM Administrators



Departmental ICT Staff



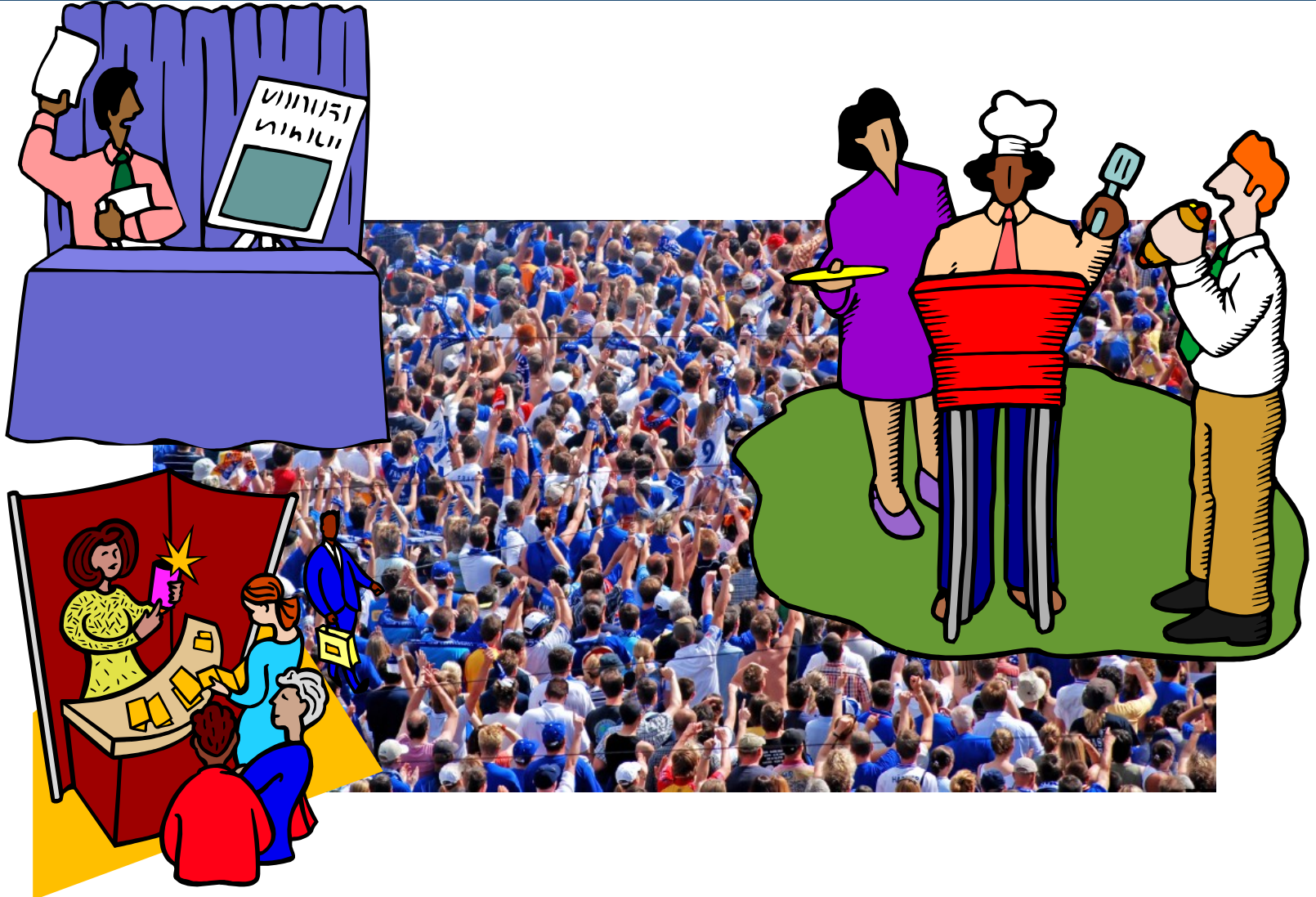
Experiences – Our Journey



**It is a partnership
mutual recognition**



Experiences – Our Journey





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Project Case Study 1 – SitsVision TRIM Integration



My two cents worth:

- › Be open minded about the new technology or concept – ask lots of questions – look for further information on web...
 - › Think through the impact on the business - how will it work for your clients
 - › Assess risk factors on recordkeeping – not just for the next two years – over time.
 - › Focus on the vital few strategic issues and know with whom you should lobby your concerns
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Project Case Study 2 - Building/Property Records



Changelings:

- ROL2 is inadequate to assist with capturing massive amount of records with few drags and drops.
- On its own domain (not in the same domain the TRIM is in)
- Central ICT – no plan for them for the next 5 years – too hard basket
- TRIM application itself is too complex – not user intuitive.

Opportunities:

- Follow standard business process and project management methodology
- If successful, could be a show case of how records of a business units where 95% are electronic can be effectively managed

Solution Design:

- Establish TRIM group server in their own domain
 - Provide adequate tool – Records Explorer
 - Design the new recordkeeping structure for the business - folders within folder
 - Leverage the logical business steps to sentence records later on.
 - Adequate training
 - Result – 4,500 e-docs captured to TRIM in 3.5 days
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Project Case Study 2 - Building/Property Records



Business Problems

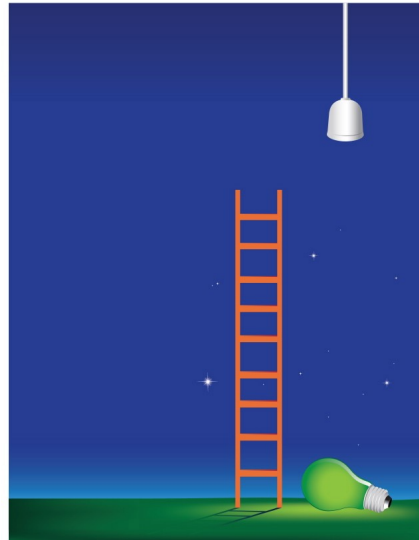
- › Accounts Payable process 8-10k invoices each month
- › Manual data entry – no replacement when staff leaves
- › Storing paper invoices – hard to retrieve, require lots of space to store for 7 years.
- › Looked at various scanning solutions ranging from 80K-120K plus ongoing click charges
- › Hard to get the business case
- › They approached ICT solution manager for advice

Solutions:

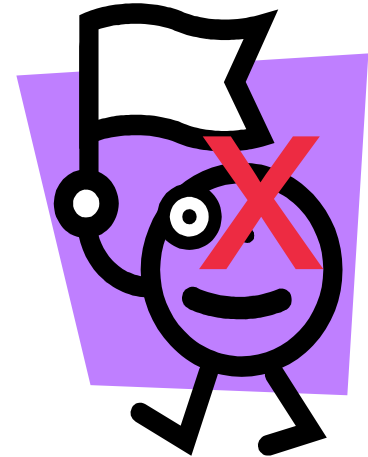
- › Recommended EzeScan costed \$30k without ongoing click charges.
 - › Ezescan to interrogate the vendor ID table and provide a unique value based on various TRIM metadata and invoice details
 - › This unique value is then inserted into a user defined field in TRIM – also for record matching purposes in PeopleSoft
 - › PeopleSoft users to retrieve invoices and supporting documents in PeopleSoft without having to access TRIM application.
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Keep abreast of
what are out there
Improve skills and
experiences



You are only limited by
your own imagination
Think the unthinkable



Continue work in
partnership with business
and ICT
Don't give up easily
think out side of the
square

QUESTIONS?

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