

SharePoint for Records Management Strengths and Weaknesses



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In-Form Consult Ltd

- Information management consultants
 - Document, knowledge, content and records management
 - Independent
- Established in 1987
- Wide range of clients in UK & Europe
 - Public and private sectors
 - Full life cycle from business case to implementation
- Standards
 - Co-author of MoReq – EU Model Requirements for Electronic Record Management Systems
 - Author of v2 Local Government Classification Scheme on behalf of Records Management Society of Great Britain

Which version?

- WSS 3 – Windows SharePoint Services
- MOSS 2007 – Microsoft Office SharePoint Server 2007
- MOSS 2007 Enterprise
- Microsoft Search Server
- Microsoft Office Forms Server
- Windows SharePoint Designer 2007

WSS 3 & Derivations

Visual Studio 2005: ASP.NET 2.0

Office Project Server 2007

Office Forms Server 2007

Office SharePoint Server 2007

Collaboration

Enterprise Content Management

Portal

Excel Services

Web Content Management

Application Services

Advanced Document Library

Thin Reports and Charts

KPIs

People Search

Dashboards

MySites

Scorecards

SAP Connector Web Parts

Workflows

Document Rendering

Advanced Report Center

Business Data Features

User Profiles

Admin Services

Site Migration

Retail Tracing

Application Template

Core Services

Templates

Site Directory

Timer

Excel Calculation Service

Personalization

Business Data Catalog

Navigation

Alerts

Audiences

Single Sign-on

Indexing

Policy (IRM)

Windows SharePoint Services 3.0 Core Platform

Feature Deployment

Site Members/ DL Creation

Topology and Farm Resources

Web Part Infrastructure

RSS Integration

User Manager

Admin Scripting

Extranet Services

Farm Credential Manager

Backup / Restore

Logging and Instrumentation

Master Pages

Pluggable Forms / LDAP Authentication

Multi-Language

Extensibility and Events

Site Rendering

Global Deployment and Federation

Windows Workflow Foundation (WF)

Distributed Tasks and Batch Services

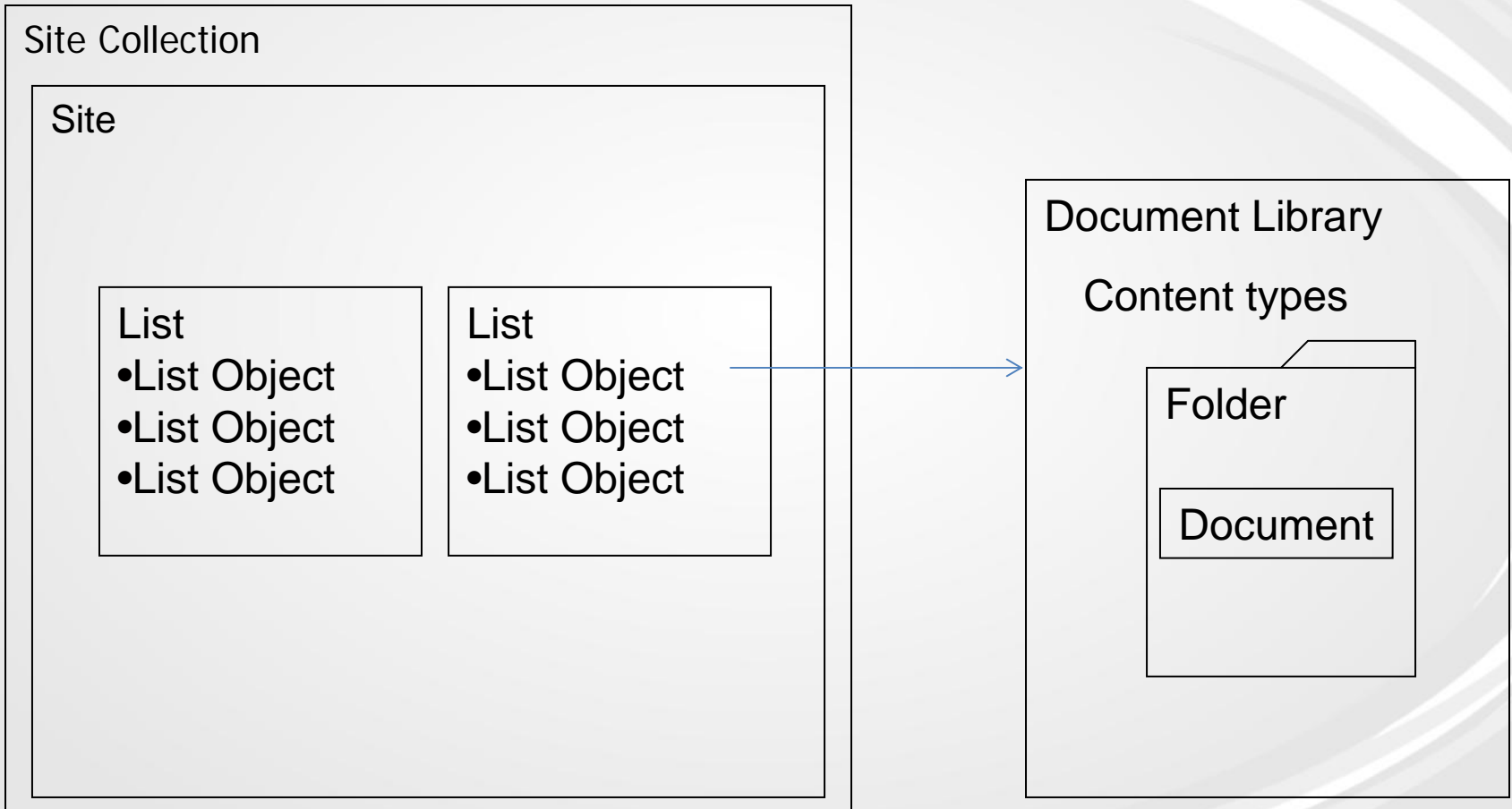
Data Store Engine

Database: SQL Server 2000 or SQL Server 2005

RM Capabilities of SharePoint

- Sites
- Content Types
- Document & Record Libraries
- Workflows
- Records Centre

EDRMS and SharePoint



Sites

- Core building block
- Most effective when users can create their own storage structures
 - How to preserve this information in a corporate structure?

Content Types

- Content types
 - Metadata containers for SharePoint items
 - Many different types + lookups
 - Document templates
 - Inheritable
 - Can have workflows

Document Management in SharePoint

- Check-in, check-out
- Version numbering
 - Major and minor version numbers
- Live copies
 - Notify users if a document for which they hold a copy has been updated
- Rendition
 - Items in different formats may be recognised as the same item

Document Management in SharePoint (2)

- Draft item security
 - Keep document invisible until it has been approved
- Built in approval process

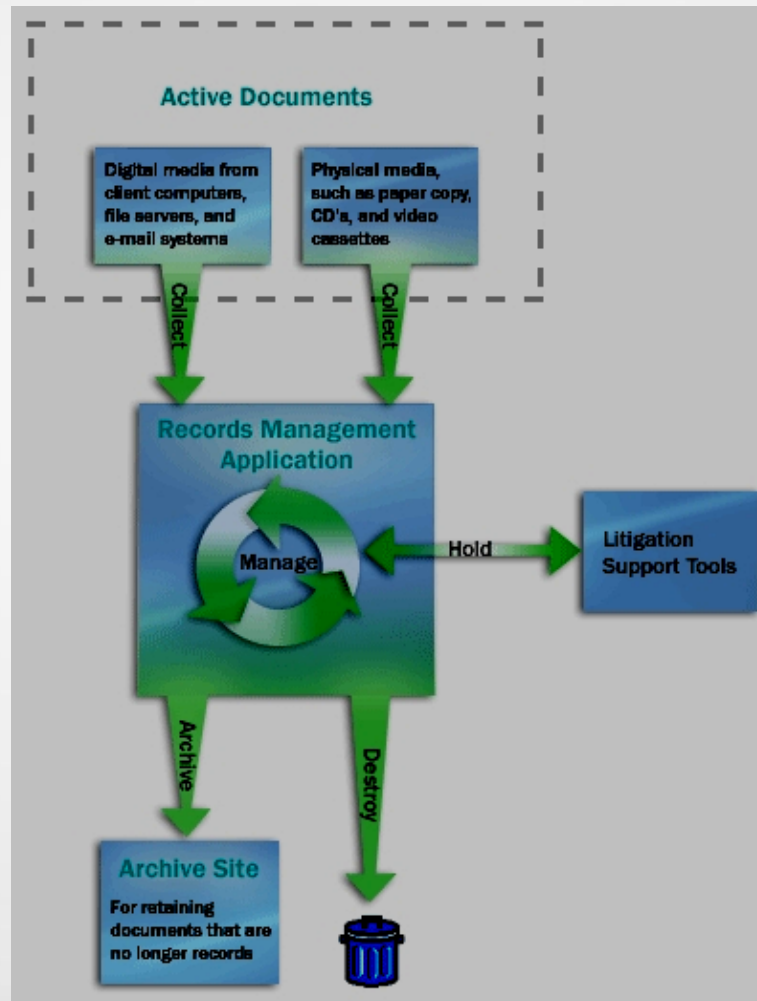
Workflow

- Core to internal workings of SharePoint
- Includes out of the box workflows for
 - Approvals
 - Feedback
 - Signatures
 - Disposal & group approvals
- User configurable via SharePoint Designer 2007

Records Centre in MOSS 2007

- Records centre
 - Separate from document libraries
 - Can receive document from many SharePoint systems
- Issues
 - Microsoft recommend only one content type per record library
 - Audit trail

Microsoft view of records management



Source:
Microsoft Technet

MOSS 2007

- Lots of hype
- Does NOT deliver corporate records management out of the box
 - Despite some suppliers asserting otherwise

MSS 2010

- Currently beta version
- Does appear to deliver basic records management appropriate for
 - Unregulated, and
 - Small/medium size organisations

Questions?



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