# Records Management in Microsoft 365

## *For Records Managers Online Forum*

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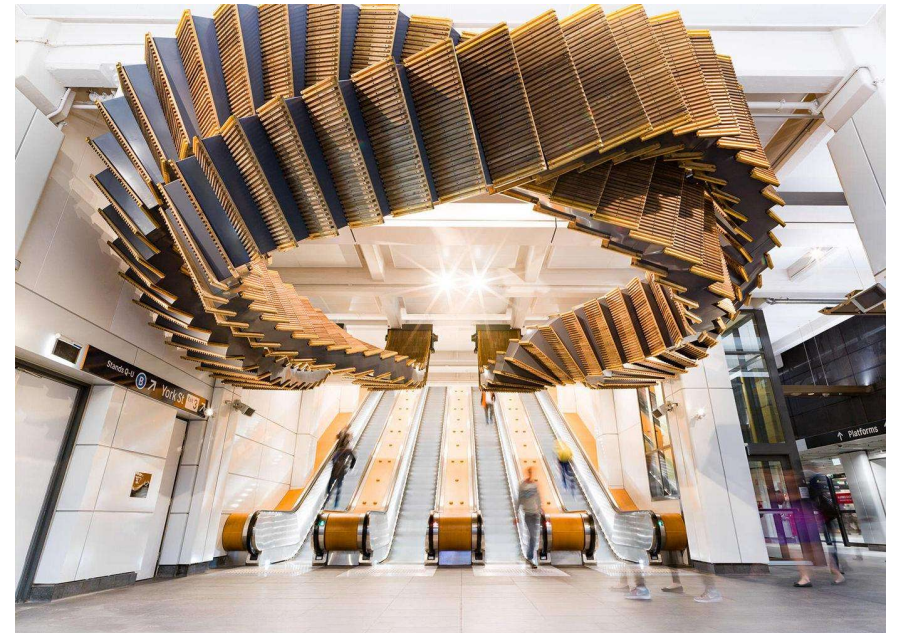
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transport.nsw.gov.au

**NSW GOVERNMENT**

# Background

- A bit about me – how I got here

- A bit about Transport

  - why this is a burning issue

# What's the Problem?

- Records are out of control - and out of Records systems
- Not possible to classify / sentence all this information manually
- Difficult for users to manage their information
- Sudden use of Teams in 2020 with little guidance
- Discoverability of information / Freedom of Information searches

**Figure 1. Estimated global volume of data**

2016
16 Zettabytes ≈
3 trillion DVDs

2025
160 Zettabytes ≈
30 trillion DVDs
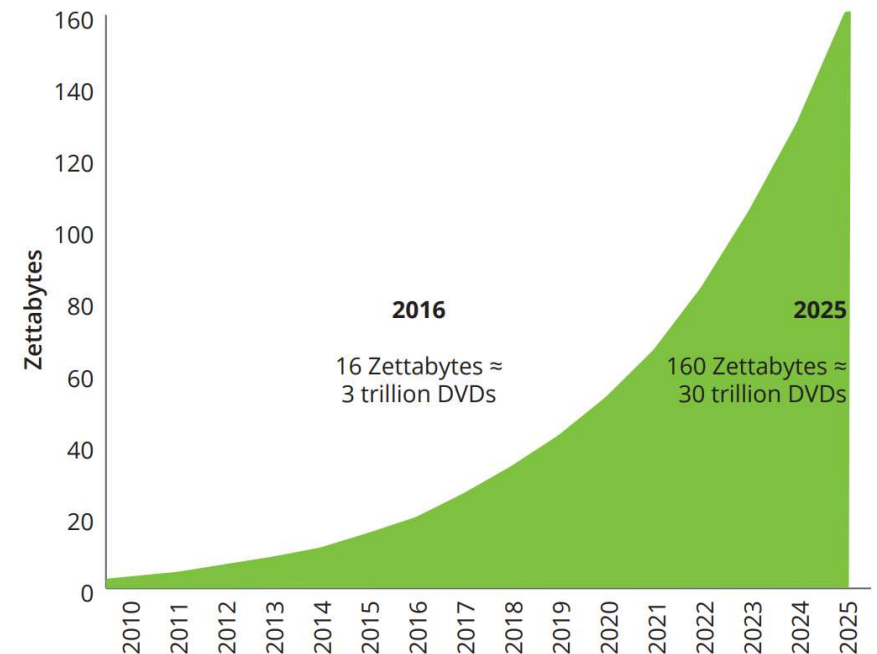
Source: International Data Corporation (2017), 'Data Age 2025'; Deloitte analysis.

# The Road to Records in 365…

- Paper – everyone can use it!

- Share drives – everyone decides how to use it

- Indexes (early EDRMS)

- Indexes plus (later EDRMS)

- It's more than an EDRMS can do …

- So … what are our options?

# Our Goal

Records management in Transport for NSW ensures the **preservation of records** so that the people of NSW have ready access to records which **illuminate history**, **enrich the life of the community** and **support good governance and accountability**.

Ensure the better management of Government records throughout their existence;

Promote more efficient and accountable government through improved recordkeeping; and

Provide better protection for an important part of the State's cultural heritage.
[NSW State Archives and Records Authority]

# Transport for NSW

- One of every system, and two of most

- At least 2 billion items of information

- Plus new focus on data – each train

  journey produces gigabytes of data

- We don't have the answer for where

  all of this should be stored

# What Goes Where
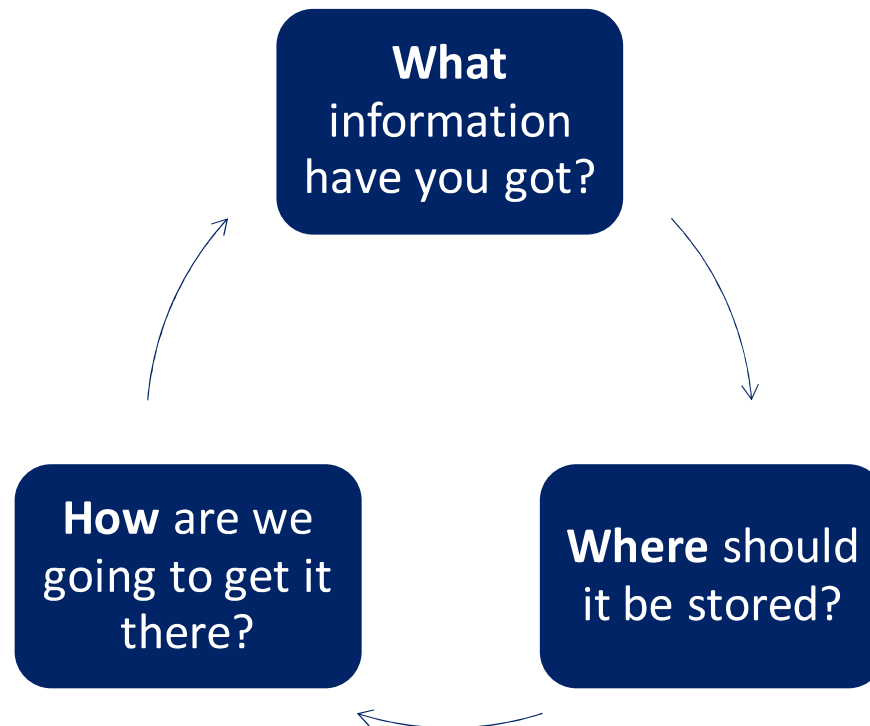
# What can we do?

- Try to work with existing systems and resources

- Integrate new data with existing EDM systems

- Start again – especially at a greenfield site

- New paradigm – something totally different

# Moving to a Records in 365 product – Transport approach

- Consolidate, modernise and stabilise our EDRMS

- New BCS with disposal classes

- Develop archiving holding 'space' and then formal archive

- Enterprise search

- Identify and solve for significant non-compliant systems

# Moving to a Records in 365 product – Transport approach

o   Using Record Point product:

- Rules and machine learning

- Additional metadata

- BCS

- Opt in model

- Focus on working alongside clients

- Experiment and learn

# Doing Records Differently

- Majority of Transport's records are now digital, and it's increasing

- *Making Information Easy to Find, Use, Manage and Preserve*

- Integrated into the IT function

- Information Management by Design

- *Customer at the Centre*

- *People at the Heart*

- *For the Greater Good*

- Standing on shoulders of giants

# Future

"Try and fail, but don't fail to try"

John Quincy Adams