

Edith Cowan University

Putting policy front and centre
at Edith Cowan University

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Records Management is never as easy to sell as it probably should be. The staff at Edith Cowan University (ECU) engaged the services of Information Proficiency to centralise management of policy documents, demonstrating the benefits of a centralised repository.

In a quest to improve the user experience in searching for University policy, statutes, by-laws, and rules, the migration to a HPE Records Manager (RM) solution has also reduced duplication of documentation and processes across the University.

In addition, the centralisation of policy document storage has generated significant savings in cloud storage costs by consolidating multiple versions and duplication.

In 2016 the University had begun a transition from local servers the cloud. As a part of this process a legacy web content server, was identified by IT as having content that would be too hard to pick apart and migrate to the new cloud based environment.

Policies and procedures stored in a MYSQL Database had to be exported somewhere that would provide centralised administration of access and be searchable on the ECU intranet and the public Web. The collection of policies that need to be made available not only to ECU staff, but also ECU students and the greater public.

“There were quite a lot of variables and considerations to be taken into account in the development of this new environment,” said Luke Burns, Records Coordinator, Edith Cowan University.

“Most importantly for Records was that HPE RM (initially implemented as ECU’s EDRMS) be the repository for the storage of the policies. The Office of Governance Services wanted a simpler interface that still ticked all their functionality boxes, and resulted in a better experience that guaranteed access for ECU staff, students and the greater community.

“Beyond that, there were University style guides and accessibility mandates to be considered. To that end IT & the Records team discussed options and subsequently engaged Information Proficiency to help devise a solution that would satisfy the requirements of all stakeholders and diversify HPRM’s positions as a business tool within the University.”

ECU had 172 Policies that needed to be exposed, not just internally but externally on the Internet. These policies were created and managed by 14 different departments of the University, which were then distributed via the Web.

It was each department’s responsibility to update their own documents and ensure that the latest version was made available on the website. As each department had its own way to store and develop these documents – it tended to cause the issue of outdated policy information being made available to the students, staff and public.

“ECU already uses HPE RM quite extensively in their environment – so it was logical step for us to suggest that Policy Data to be captured in Records Manager. This would then make it managed data – allowing for the ECU Records Team to take ownership and provide the University single place to reference these documents from” said Ben Brown, Software Engineer, Information Proficiency.

Once the policies were imported into HPRM with related metadata, a decision had to be made how best to expose them to ECU students, staff and general public.

HPE RM provides a few methods to achieve this – either via SharePoint, WebClient, ServiceAPI or WebServices. Information Proficiency opted to use WebDrawer as part of the solution, which is included in the RM base license package minimising the cost and leveraging the existing investment made by ECU. WebDrawer also limits users to only view and download documents making it an ideal platform for exposing data.

ECU wanted a google-like search experience, which is not available out of the box with HPRM WebDrawer. The default search interface is a series of three search dialog boxes that can be joined with AND/OR clauses.

ECU did not want any drop downs, tickboxes or additional options to confuse their users.

This was able to be achieved by creating a custom face plate that sat in front of HPRM WebDrawer and presented the user with a single search bar that they could type into, and then either press enter, or the search button to execute their search.

WebDrawer pulls results directly from the HPRM Database – this means that the results will always be the latest version/revision of the document. So, in the future the policy owners only need to update this document in a single place and not have to worry about outdated versions being displayed on the webpage.

Since moving to a cloud provider, ECU's IT department has become very aware of just how much storage was actually costing them every month. Documents were often being saved across many different spaces – shared drives, web server, HPRM, desktops and the like – meaning that ECU was paying to store the same document two, three or more times.

An added benefit of the policy storage being centralised with HPRM that this data now being managed and included in the ECU Maintenance and Backup plans run by their IT Department.

“Perhaps the biggest win from an RM perspective was that we managed to show the diversity and potential of HPE Records Manager,” said ECU's Luke Burns.

“The project created an environment where documents stored in HPE RM can be made available quickly and easily to anyone interested in viewing them. Solutions like the ones created by Information Proficiency for the ECU policy database are excellent examples to show users, to show them the depth of the system and its potential, to work to make HPE RM a part of people's working day.”

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