



CASE STUDY

UNIVERSITY GETS STARTED WITH THE MICROSOFT 365 COMPLIANCE CENTER

Amongst the largest higher education providers in the UK, a leading University wanted to ensure that all of their Microsoft 365 content was being appropriately managed.

Storing hundreds of thousands of digital files and physical records, the University had a clear need for a new digital records management solution based in Microsoft 365. Intelogy worked closely with to assess requirements and translate their existing file plan and retention schedule into an architecture of SharePoint sites complete with retention labels.

This structure was then rapidly implemented by Intelogy, providing the University with a hub for storage of all their future records. The well-received solution made significant use of event-based retention labels, which trigger the start of

retention around academic, financial and calendar years.

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It was great to be able to revolutionise the process of managing records across such a prestigious institution. Making use of event-based retention labels, which are aligned around calendar and academic years has allowed us to provide a cutting edge and largely automated solution, which has radically improved the ability to process digital records across the University.

Rob Bath, Knowledge & Information Management Practice Lead, Intelogy

CHALLENGES

The institution recognised that while much progress had been made towards adoption of digital working, many files were still frequently being processed physically. This was especially the case for records, where the University maintains thousands of files spanning decades, ranging in context from information around their campuses and buildings to results obtained by former students.

The University launched a Digitisation Project, which aimed to move to a paper-lite environment by introducing a digital first approach for

processes. This initiative aims to reduce the volume of paper records held by at least 85%. The introduction of a digital records management solution was identified as a key component that would help the University meet this objective.

One of the key challenges that the University faced was how best to translate their existing file plan and retention schedule, which had been defined primarily with physical files in mind, so that it could be applied to a digital records management solution.

SOLUTION OVERVIEW

Having already selected Microsoft 365 for collaboration and storage, the University's records management team decided that the platform's retention capabilities would provide them with the best approach for managing digital records. Recognising the specialism of configuring the Microsoft 365 Compliance Center, the University selected Intelogy as their partner to oversee the design and implementation of their records management hub.

With a dedicated Knowledge & Information Management practice, Intelogy's team are at the very forefront of records management in Microsoft 365. Shaping the engagement, a series of workshops helped to identify the University's understanding of Microsoft's compliance capabilities and provide skills transfer where needed.

This process empowered the University to make informed decisions about the nature of their future records management solution.

One of the key challenges was translating the University's existing file plan and retention schedule into an architecture that would best meet their needs. By evaluating the file plan in detail, our team defined a detailed model for retention labels, including how they are triggered, their duration and whether they result in disposition review or automated deletion.

It was especially important to the University that many of the retention periods only began at the end of the academic, financial and calendar years. In order to realise this, Intelogy made extensive use of Microsoft's 'event-based' retention labels. This approach necessitated the seeding of default date metadata across content, removing the need for manual classification. The result of this approach has allowed the University to automatically trigger the start of retention for thousands of files in accordance with their retention schedule.

The University also required certain retention periods to be triggered when individual files are superseded. Having evaluated the different approaches that would allow us to achieve this, it was determined that the most appropriate

option was to have two separate retention labels in these scenarios. A 'permanent' default label could then be exchanged for a retention label with a much shorter duration when the item is superseded. As this step is manual, Intelogy made sure that the name given to each retention label was as intuitive as possible, to avoid confusion or potential error.

To implement the architecture, our team created PowerShell scripts that created a SharePoint Hub, containing a series of separate sites. Each site contained multiple libraries, with default metadata and retention labels applied.

RESULTS

With Intelogy's guidance the University was able to successfully make use of the retention capabilities provided in Microsoft 365, by using them to craft a records management solution that fully supports their retention schedule. The University has now successfully launched their tailored records management hub, which is quickly becoming a central repository for all of their digital retention.

Attention has now switched to the scanning and migration of decades of records into the new hub. Once complete, the University will be well on their way to meeting their objective of moving to a paper-lite operating model.

Don't hesitate to reach out if you have Microsoft 365 Compliance Center requirements. Our experts would be happy to help.

CONTACT US IF YOU NEED SUPPORT WITH A SIMILAR PROJECT

At the forefront of Microsoft 365 in the UK, Intelogy specialises in helping organisations work better together. Get the most out of your investment in Microsoft 365, by combining engaging communication and rich collaboration with a solid foundation of security and governance.

We make your technology work harder, so that your team don't have to.

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