

## Mapping SharePoint 2007 to MoReq2

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## Alternative Title

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... or

An exercise in knowing how bad  
it could be and knowing enough  
to avoid the worst

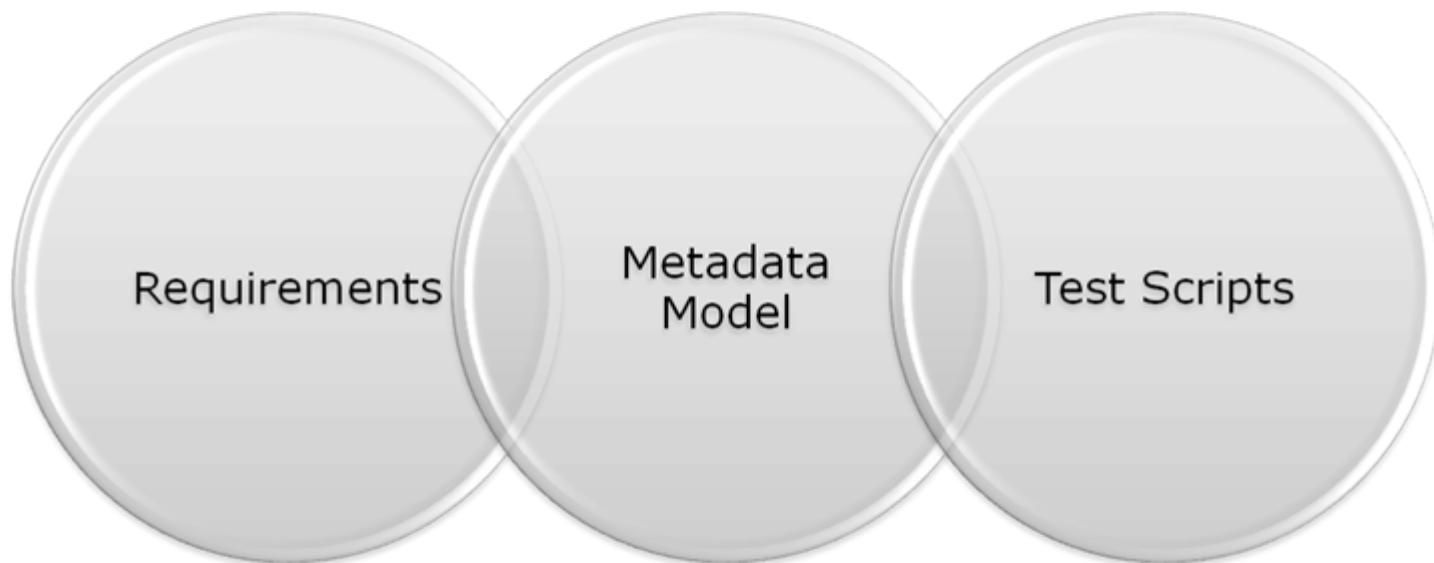
# Introductions

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- What am I am going to talk about...
- What am I not going to talk about...
- Despite anything I might say, I like and use SharePoint on a daily basis

# What is MoReq2?

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# And SharePoint...

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*"Office SharePoint Server 2007 provides a single, integrated location where employees can efficiently find organizational resources, access corporate knowledge, and leverage business insight to make better-informed decisions."*

Microsoft, 2007

# The Microsoft SharePoint Pie

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# Microsoft's Approach to RM

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According to Microsoft, there are four steps to implement RM in SharePoint:

1. Create Information Management Policies
2. Set up document library structures
3. Configure the routing table
4. Test the records centre

It's a bit more complex than that!

But just how much more complex....its important to know!

# Why carry out the exercise?

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The publication of MoReq2 coincided with increased interest in SharePoint 2007 as an RM tool – raised the profile of some of the challenges

MoReq2 has an excellent reputation within the RM community

SharePoint is known to have problems with RM – but people have problems pointing at specifics

The unifying of two different vernaculars – RM vocabulary through MoReq2 and IT through SharePoint

# What does it look like?

Ref	Requirement	OOTB	Admin Config	Admin Dev	Plug In	Not Poss	Sub Total	Mandatory	Desirable	Weight of Req	Total (subtotal x weight)
3.1.1	The ERMS must support and be compatible with the organisation's business classification scheme.	x					5x		4	20	
3.1.2	The ERMS must maintain internal integrity (relational integrity or otherwise) at all times.	x					5x		4	20	
3.1.3	The ERMS should allow administrative roles to label each classification scheme with a Title, and Description, and must automatically label each classification scheme with an Identifier.		x				3	x	2	6	
3.1.4	The ERMS must be able to support a classification scheme which can represent files and records as being organised in a hierarchy of classes.		x				3x		4	12	

# Decisions, decisions, decisions

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- There are always different ways to configure SharePoint to do anything
- The % that an option complies with MoReq2 can be a useful tool to help RM win the battle
- Perfect example from the mapping is that of classification schemes in the RM centre

# Options for classification scheme

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1. Out of the box option – documents classified based on content type – big buckets sorted by date of declaration
2. Use metadata fields to create a ‘virtual’ tag based file plan through advanced search
3. Configure SharePoint Records Centre to use a full hierarchical file plan

# Which option is supported through the mapping?

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Option 1: Complies approx. 40%

Option 2: Complies approx. 65%

Option 3: Complies approx. 90%

So option 3 seems like the best choice.

However, a quick chat with a developer will tell you that the options stack up like this:

Option 1: development time – 0 days Build time – 3 days

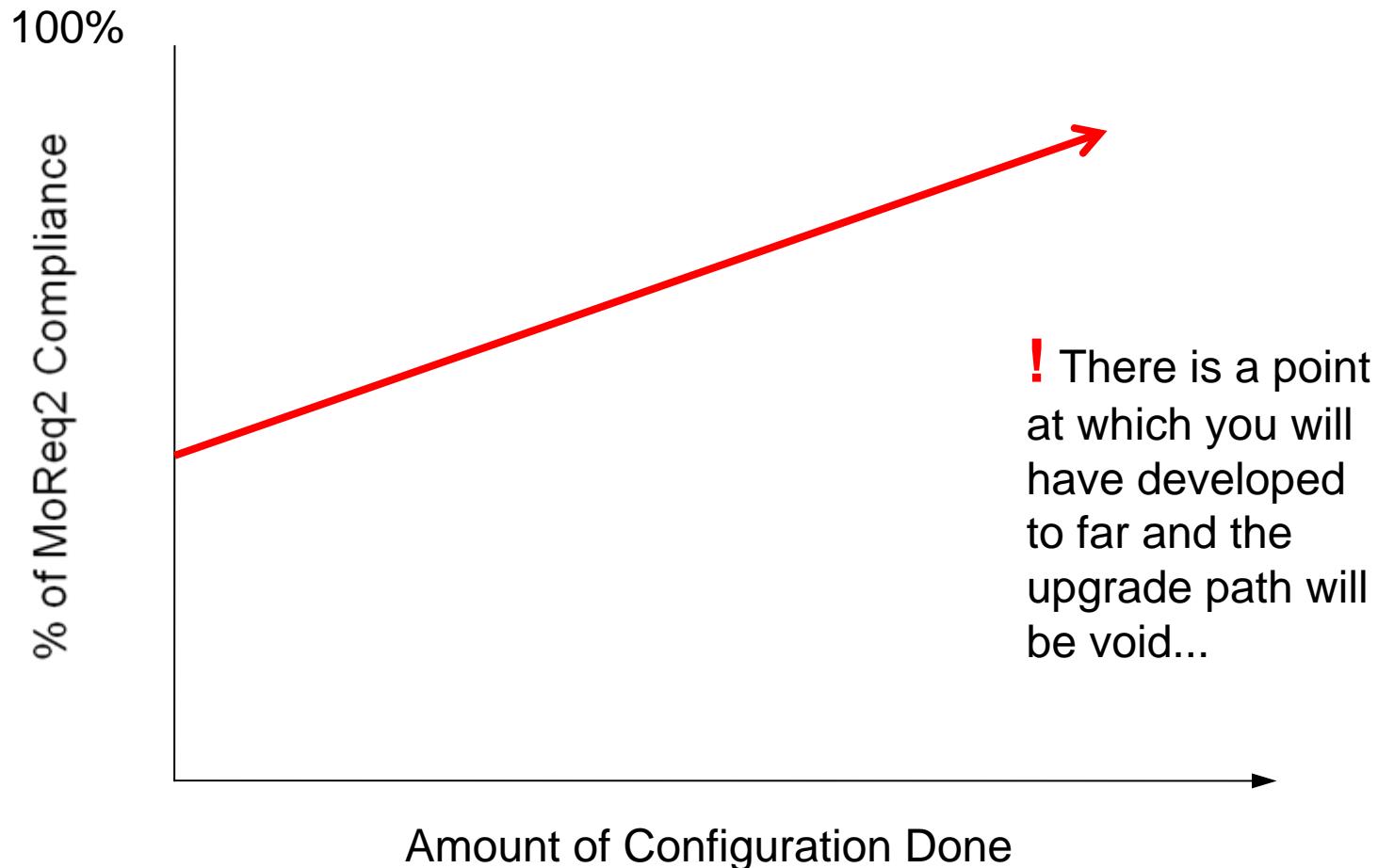
Option 2: development time – 5 days Build time – 3 days

Option 3: development time c.20 days Build time - 10 days

So which is the better option?

# The Problem with Developing

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# Applications of findings

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- Prioritise development time & effort
- Implementing a risk management approach
- A tool through which to engage IT Dept
- Offer a way for RM to get involved

# SharePoint Strengths & Weaknesses

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- SharePoint fulfils between 40-60% of the requirements (depending on configuration options)
- Areas of strength:
  - Access Controls
  - Search & Integration
- Areas of weakness:
  - Management of classification schemes
  - Management of retention/disposal schedules
- But remember – SharePoint is only a platform, you can make it do anything you want, with enough time, money and resource!

# Case Study 1

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- Strategic Partnership of 7 Academic Councils.
- Unify multiple EDRM systems
- Wanted a short list – IT very keen on SharePoint, Business unsure
- Question to be answered: Is SharePoint good enough?
- Exercise undertaken to map SharePoint 2007 functionality to core MoReq2 requirements.
- Their answer?

# Case Study 2

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- NHS Organisation
- Have selected SharePoint 2007 as their EDRMS
- IT very keen on SharePoint, Records Manager is concerned about shortfall in functionality
- Question to be answered: Where will the organisation be exposed to risk? Where is it necessary to concentrate limited developer resource?
- Their answer?

# MoReq2 versus DoD 5015.2

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- US standard – add on exists
- US add on is not supported by MS
- SharePoint is a US product
- RM does not sell Microsoft any more licences
- So do not expect to see MoReq2 compliant modules any time soon

# Conclusions

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- An exercise such as the mapping can help guide organisations through the potential risks and enable informed decision making
- Tying your arguments to a well known and respected standard strengthens them considerably
- SharePoint as a Records Management Tool can be as good or as bad as any other (with the caveat of time money and resources)
- For some it is the perfect answer

## Questions?

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