

The Microsoft SharePoint 3.0 Juggernaut: Why Records Manager Should Care

Part 1

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You know the old joke: "Where does an 800 pound gorilla sit?...Anywhere he wants!" Officially known as Windows SharePoint Services 3.0 (SPS), this upgrade to SharePoint 2.0 is part of Microsoft's Vista, Office 12 product suite and evolving product strategy. SPS 3.0 encompasses Microsoft's recognition that document management is a crucial aspect of information management and that "management" includes the full lifecycle of official records. That's right, Microsoft has recognized the existence of records managers, the role of records in the enterprise, the demands of compliance and governance, the risks associated with poor attention to records management lifecycle, and the ballooning cost of litigation associated with digital asset discovery.

Why is SharePoint different from any other document/records management system and why could it have more of an impact the lives of records managers? There are a lot of answers to that question but the main one is: Cost and availability. Most organization's license packs *include* SharePoint Services. And many organizations have implemented SPS 2.0 to some extent (either in a few departments, for IT testing, or on a broader scale) in the past. But with SPS 3.0 enhancements it will be even more enticing to roll out SPS for broader use. That means more documents and emails will be moving off network drives and Exchange servers and into the controlled world of SharePoint. And that means records managers can finally get full lifecycle control of more content in the enterprise.

Records Managers need to be knowledgeable of SPS 3.0 features and functions – not just the records management features, but a broad understanding of the range of features and functions so that you can be proactive in recommending SPS to solve business problems, safeguard critical documents and records through strategic deployments, and be proactive working with the IT and user community to insure that SPS applications are designed properly. Features that may have no meaning to an IT person may be a huge bonus for you. (For instance, SPS 3.0 includes functionality to embed barcodes in documents. From a records management and end user perspective, this means auto indexing at scan time and proper classification of the document.)

SPS 3.0 now includes a full records management system with sophisticated features driven by the user community for the user community. There is a very informative blog authored by the Microsoft Records Management Team that explains not only the RM features but the reasoning and logic driving the development of the product; see <http://blogs.msdn.com/recman/> Read the blog beginning in April to get a good background on the RM features of SPS 3.0.

There is another terrific opportunity for records managers that may not be obvious: the use of SPS to disseminate and manage *your own records retention and management policies!* One of the SharePoint features (also available in previous versions) provides subscription services to content areas; when content in the area is modified or added, subscribers are notified via email of the change/addition. By placing records policy and retention plans in an SPS repository, all department records coordinators can subscribe to the content that impacts them; when you, the records manager, changes the policy, all involved people will be immediately notified. You get out of the business of insuring everyone "got the message".

In conclusion, Microsoft is the 800lb gorilla and they mean business in the document and records management world. Recent agreements with EMC and Iron Mountain are just the beginning of bandwagon jumping. Records managers must be proactive in their involvement with SPS deployments to ensure proper application definition and RM policy enforcement.