# AvePoint®

# Bendigo Kangan Institute Migrates Data and Builds Compliant Records Management Strategy with AvePoint

## BENDIGO KANGAN INSTITUTE
### ONE INSTITUTE. ONE VISION

**Customer Location**
Melbourne, Australia

**Industry**
Education

**Platform**
Microsoft 365

**Critical Needs**
- Migrate data from file system to cloud
- Deploy records management system to meet compliance requirements
- Implement best practices (i.e., classification schemes, retention policies, etc)
- Align new system with existing enterprise architecture roadmap

**Solution**
- AvePoint Cloud Records
- AvePoint Fly
- AvePoint Office Connect

## ⭐ Success Highlights

- Moved 10 TB of files to Microsoft 365
- Automated, compliant records management in SharePoint
- Established governance and compliance around new and existing Microsoft 365 workspaces
- Enabled compliant management practices like naming conventions, audit trails, and legal records destruction

## 🔍 Customer Profile

Bendigo Kangan Institute was established in 2014 by the merger of two TAFE institutes – Bendigo TAFE and Kangan Institute – and related service providers – VETASSESS and eWorks. With more than 30,000 enrolments each year, Bendigo TAFE and Kangan Institute are a major Victorian training provider with center's of excellence in automotive, health and nursing, food and fiber as well as a strong presence in a range of industries such as fashion, business, justice and legal, hair & beauty and indigenous education.

## ⚙ The Challenge

Bendigo Kangan Institute's (BKI) previous records management strategy was "inconsistent and at times, ad hoc, across different systems," according to Kerri Ricketts, Manager, Records, Information, and Capability at the Institute. Its practices were also not in line with Public Records Office of Victoria (PROV). "We didn't have a clear records management approach, which meant at times, records could be hard to find and there was a limited audit trail."

BKI had siloed information across the organization, with several network drives (one 10 TB and another 13 TB) containing critical information. "That doesn't include desktops," says Jon Crust, ICT Project Manager at the Institute. "Information stored there is likely old, duplicated data but we need to confirm that and dispose of it in a compliant manner."

To implement compliant records management, Kerri and Jon had to start from scratch, migrating their data to a centralized location and establishing proper management policies.

## 💡 The AvePoint Solution

Kerri had heard from a colleague that AvePoint was "flexible, agile, and listened," which was important to BKI: they didn't want a product, but a partnership. It was also critically important that their new records management system fit into their overall enterprise architecture roadmap. This is part of what made AvePoint Cloud Records so appealing to BKI.

"Because AvePoint's tool sits on SharePoint, we are just adding new functionality to a Microsoft product we're already using," explains Kerri. "SharePoint is great for end users, but a little scary for record managers. AvePoint's knowledge of SharePoint and record management was reassuring."

Cloud Records offers advanced records and information management, enabling records managers to easily automate business rules to manage the entire content lifecycle - from creation to classification and retention. The solution can centralize content from Microsoft 365, SharePoint on-premises, Exchange Online, social media, and file systems directly alongside physical records.

Using Cloud Records, BKI set business classifications in the back end, automatically implementing retention periods based on the rules they set for each, and came up with procedures for proper record destruction, ensuring no information would be kept longer than necessary.

Kerri says, "Cloud Records automated a heap of things I would have to do manually or get the end user to do – which we know is never successful." And because Cloud Records was purpose-built to assist organizations in meeting global regulatory requirements, BKI can easily meet PROV compliance requirements.

BKI partnered with AvePoint to move their 10 TB network drive to SharePoint as well. AvePoint Fly delivers a three-step approach – via a self-guided tool or with help from AvePoint – to migrate on-premises or cloud-hosted mail, content, and collaboration into Microsoft 365 or SharePoint.

"The migration was fantastic," Jon says. "The three-step process works and has less impact on users. It was clear AvePoint had done it many times. We already had a mitigation plan in place for the small percentage of thing that did go wrong, making it the smoothest migration I have ever been part of – even though it was completely remote."

BKI recently acquired AvePoint Office Connect – which merges content from applications like Exchange Online into SharePoint and Microsoft 365 – to help streamline and automate content integration. The Institute is currently developing guidelines and trainings for users and will deploy the solution soon.

## 👉 The Bottom Line

Rolling out a compliant records management strategy doesn't happen overnight, and this is just the first step of BKI's multi-phase, five-year plan. However, "With AvePoint's help, we're much better than where we were 12 months ago," Kerri says. "Our records are classified. Retention is applied. We have audit trails and legal destruction of records. Most importantly, we don't have end users doing records management – that's not their job. That's my job."

Next, BKI will begin to migrate the rest of their records and determine a strategy for their legacy paper records, bringing them one step closer to their vision of a centralized, compliant environment.

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> *- KERRI RICKETTS, MANAGER, RECORDS, INFORMATION, AND CAPABILITY AT BENDIGO KANGAN INSTITUTE*