AvePoint®

Cancer Council NSW Moves 20 Years of Records From HP TRIM to SharePoint Online, Manages Them With AvePoint Opus

Customer Location
Sydney, Australia

Industry
Not-for-profit

Platform
Microsoft 365

Critical Needs
- Migration from HP TRIM to SharePoint Online
- Automated records management
- Data protection and backup

Solution
- Cloud Backup for Microsoft 365
- AvePoint Opus

⭐ Success Highlights

- Successfully moved 20 years of records from HP TRIM to SharePoint Online.
- Transitioned from user intensive two-step, thirty minute per record process to fully automated, behind the scenes record management.
- Improved record management adoption, coverage and compliance.
- Easily and quickly restored SharePoint site template and associated permissions following administrator error.

🔍 Customer Profile

Cancer Council NSW is Australia's leading cancer charity, and the only Australian charity working across every aspect of every cancer, from research to prevention and support. They have about 350 employees and 1,000 volunteers supporting their mission. Due to the nature of their work, the organisation has multiple types of records that fall under different regulations including financial, legal and personnel.

⚙ The Challenge

Cancer Council NSW was trapped in HP TRIM, an on-premises legacy document management and records system.

"We had tried to get rid of TRIM as far back as 15 years ago," said Tonia Marsh, IT Operations and Security Manager, Cancer Council NSW. "Before AvePoint, we talked to a few other vendors and no one wanted to touch it. They didn't think they could move it."

The legacy system was cumbersome and slow.

"It was a two-step process for many things. For example, during an offboard process HR would have to check to see if there had been an incident because that changes the retention requirement," said Marsh. "It would take about a half hour per record to navigate the systems, manually look at the data and take action—so people stopped using it."

It also required Cancer Council NSW's end users to be aware of the record management policy and act like record managers, which resulted in lower than desired compliance.

"When it was time to manually archive the working documents into digital records, end users would have to manually move them to TRIM

and encode them correctly and put them in the correct groups," said Marsh. "People were a bit scared to use the system."

💡 The AvePoint Solution

Marsh and team began the process of seeking a vendor who could move and help them manage their HP TRIM Records in SharePoint Online. Their timing proved fortunate.

"We didn't know when planning this move that in 6 months COVID would be coming," said Marsh. "But it was a blessing."

AvePoint moved 20 years of records to SharePoint Online, and set Cancer Council NSW up with AvePoint Opus to automate their management.

"We extended the native functionality Microsoft provides because we needed more advanced retention procedures and we had to keep track of physical records as well," said Marsh. "Some of the tagging in TRIM relates to records offsite in boxes and AvePoint's product let us track it alongside our digital records."

Microsoft labels only allow for a flat hierarchy and only one action is permitted per label. AvePoint Opus's automation enabled more complex actions to take place without user intervention.

"Now that two-step offboarding process that took 30 minutes per record takes no time. HR is very excited about it because all they do is move the user from one directory to another and it takes care of itself." said Marsh. "We are able to retain our records for the appropriate period based on the type of record and we are fully in compliance."

Cancer Council NSW has also protected their data within Microsoft 365 with AvePoint Cloud Backup.

"We use Cloud Backup extensively. It's awesome for our audit and it's been really easy," said Marsh.

The solution has helped Cancer Council NSW restore data several times that otherwise would not have been recoverable.

"One time a SharePoint admin messed up the front page of a key SharePoint intranet template and mucked up all the others. Finding what they had done would have taken hours, but with Cloud Backup it took us five minutes in the morning to restore before anyone was online and noticed there was even a problem," said Marsh. "Another time two Teams had very similar names and the wrong one was removed without anyone noticing for a long period of time. We were able to restore it back and get to the data we needed."

👉 The Bottom Line

For Marsh and Cancer Council NSW the implementation of AvePoint Opus has been a great success.

"The success of AvePoint Opus was multi-pronged. We finally got rid of a legacy system we had tried to leave for 15 years. But also, our users have embraced the new records management system. They aren't threatened by it—they can't even see it. People who pushed back on this project from the start are now asking for more."

When asked for her advice for others looking at automating their digital records she said, "It's a task worth doing. It will simplify things for users and remove the element of human error."

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