

Cardinia Shire Council Targets 100 Percent Record Retention & Compliance with Cloud Records

**Customer Location**

Melbourne, Australia

Industry

Public Sector

Platform

Office 365

Critical Needs

- Compliance with Australian Privacy Principles and Office of Victorian Information Commissioner and Public Records Office of Victoria (PROV)
- Transition from existing system to Microsoft 365 records management

Solution

- AvePoint Cloud Records

★ Success Highlights

- Additional functionality, annual cost savings, enhanced security, future proofing, reduced infrastructure overheads
- Transitioning from 50 to 100 percent record retention
- Move from existing system and network drives to Microsoft 365 platform

🔍 Customer Profile

The Shire of Cardinia is a local government area in Victoria, Australia, in the south-east of Melbourne between Western Port and the Yarra Ranges on the outskirts of Melbourne. They have about 500 users and 4.5 TB of data which migrated from HP TRIM to Microsoft 365.

⚙️ The Challenge

The Cardinia Shire Council is a public sector leader in records management compliance.

On two separate occasions—2016 and 2018—they were awarded the PROV Sir Rupert Hamer Excellence in Records Management award for two separate initiatives in information management.

“In the last 10 years Cardinia Shire Council has developed a proud culture of compliant records management,” said David Jackson, Manager of Information Services, Cardinia Shire Council. “It’s been one of the best records management cultures I have witnessed in 35 years.”

As part of the Cardinia’s proactive stance towards records management, the team launched a comprehensive analysis to determine its coverage across all the systems generating data and records.

“The analysis showed that we were capturing 50 percent of generated records. Additional records were being stored in network drives, user profiles and external storage devices,” said David. “It is tempting to put blinkers on and say you are compliant in official systems and through your official policies. For us, we wanted

that to be real. We wanted to look at how work was actually being done and how records were actually being generated. It's a public duty we take seriously."

The AvePoint Solution

Cardinia realized true records compliance doesn't come from placing extra demands on users, but by making it easier for users to do the right thing than it is to do the wrong thing.

"Cardinia wanted to capture the energy of the existing culture and provide compatible records management tools that were compliant, simple, seamless, and future proofed that would allow us to close the gap of 50% missing records" said David.

Cardinia evaluated its incumbent system along with other system market leaders and Microsoft 365. Ultimately, they selected Microsoft 365 in part due to AvePoint Cloud Records functionality that enabled them to potentially achieve 100 percent compliance.

"We saw the possibilities with Microsoft 365, OneDrive, Teams and SharePoint, however we needed a partner to deliver the final step of SharePoint records management to allow full PROV and VERS compliance," said David. "This was achieved with AvePoint."

Cardinia finds Cloud Records to be a useful and intuitive tool for tracking their digital and paper records.

"The end user interface is great...the feedback on the administration interface is that it is pretty easy as well," said David.

Despite challenges with change management which were complicated further due to COVID, Cardinia has seen widescale adoption as a result of providing end users with an easy to use set of collaboration tools with fully automated, behind the scenes records management.

"Microsoft 365 adoption has increased, while our monthly network files being created number has dropped from 20K to 5K since implementation," said David. "In December 2020 we will shut down the network drives meaning 100 percent of data should be in the correct locations, fully compliant under our records management system."

The Bottom Line

Looking back on the project, David can report that all seven of the defined key outcomes have either been delivered or are expected to be delivered shortly including:

- Additional functionality;
- annual cost savings;
- Enhanced security;
- Enhanced compliance;
- Future proofing;
- Reduced infrastructure overheads; and
- Improved records management capability.

When asked for his advice for those examining similar initiatives he said:

"Don't underestimate change management. It's a journey and it's been our biggest challenge so far. Be sure to pick a platform rather than a point solution and work with your partners. Finally, implement incrementally where possible, but don't drag it on for point solutions. "

“We saw the ability to [capture all of our records] with Microsoft 365... however we needed a partner to deliver the final step of SharePoint records management to allow full PROV and VERS compliance. This was achieved with AvePoint.”

— DAVID JACKSON, MANAGER, INFORMATION SERVICES, CARDINIA SHIRE COUNCIL

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