



Leveraging SharePoint

to Better Manage the University's HR Records

02/27/2024

2023 - 2024 FINANCIAL STEWARDSHIP INSTITUTE

GROUP 4 CAPSTONE PROJECT

PROJECT SPONSORS

- Mahnaz Ghaznavi (University Records Manager)
- Jeff Jones (Director of Digital Work Environment Services, Information Services)

PROJECT CHARGE

- The goal of this project is to survey UO's current administrative processes, and how the information (records) from those processes is being handled (where are the records stored, who is responsible for them, how do the records get into those systems, who reviews the records for retention, how are the records disposed of). Next, determine which of those processes could be moved into SharePoint, and prioritize the list in terms of what you believe the University should focus on first.



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PROJECT MEMBERS

- Heidi Clarke (Associate Director of Finance) - Data Visuals
- Natalie Davis (Executive Assistant & Strategic Initiatives Coordinator) - Executive Summary
- Tana Gonzales (Business Ops Manager) - Academic Outreach
- Lydia Harlan (Budget Analyst) - PowerPoint
- Kelsey Van Brocklin (Research Assistant / Project Coordinator) - Data Collection
- Leland VanBrunt (Sr IT Security Compliance Analyst) - Gift of Gab



PROBLEM DESCRIPTION

Various administrative processes across campus utilize workflows currently running:

- Differently
- Through disparate software
- Manually
- Combination

ANTICIPATED BENEFITS

Workflows could potentially migrate to SharePoint with the following benefits:

- Leverage M365's workflow features
- Reduce redundancy
- Reduce storage needs and costs on shared drives
- Save staff time



TARGETED UNITS

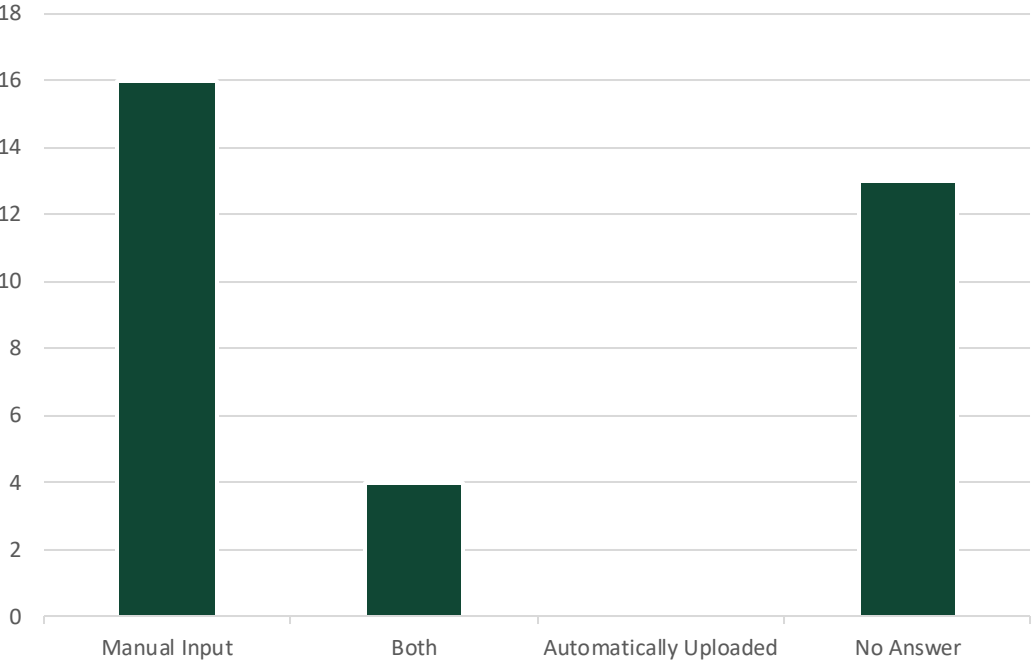
Our Qualtrics survey was emailed to:

- Designated Records Stewards Across Campus
- College of Arts & Sciences (CAS)
- Finance and Administrative Shared Services (FASS)
- UO Alumni Association (UOAA)
- Provost Administrative Shared Services Team (PAST)
- Central Business Services Office (CBSO)
- Housing (Auxiliary)

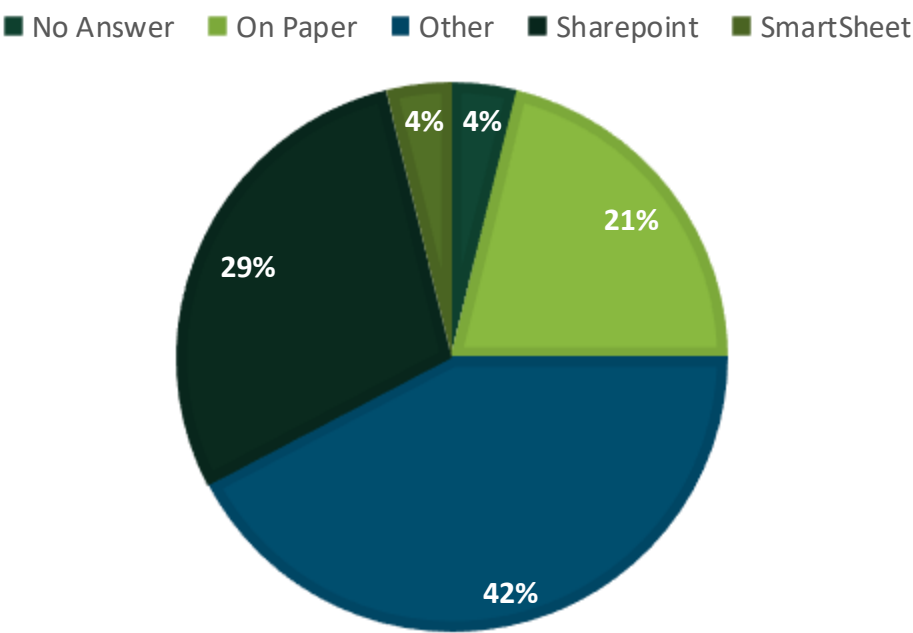


RECORD ENTRY & STORAGE

HOW ARE RECORDS ENTERED

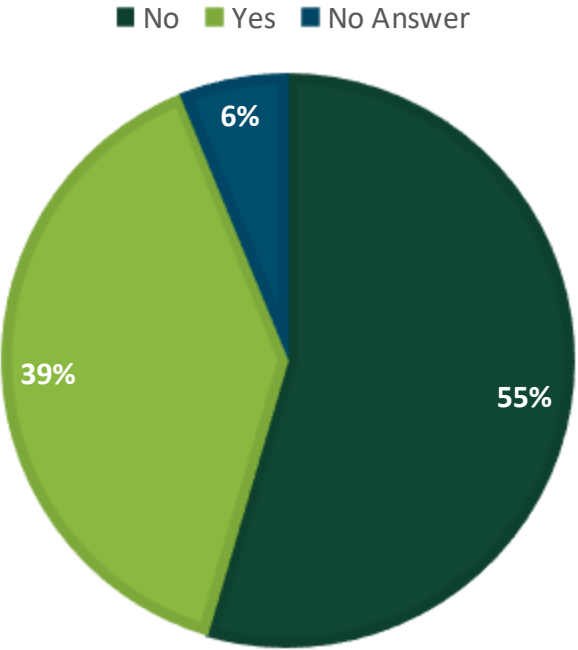


HOW RECORDS ARE STORED

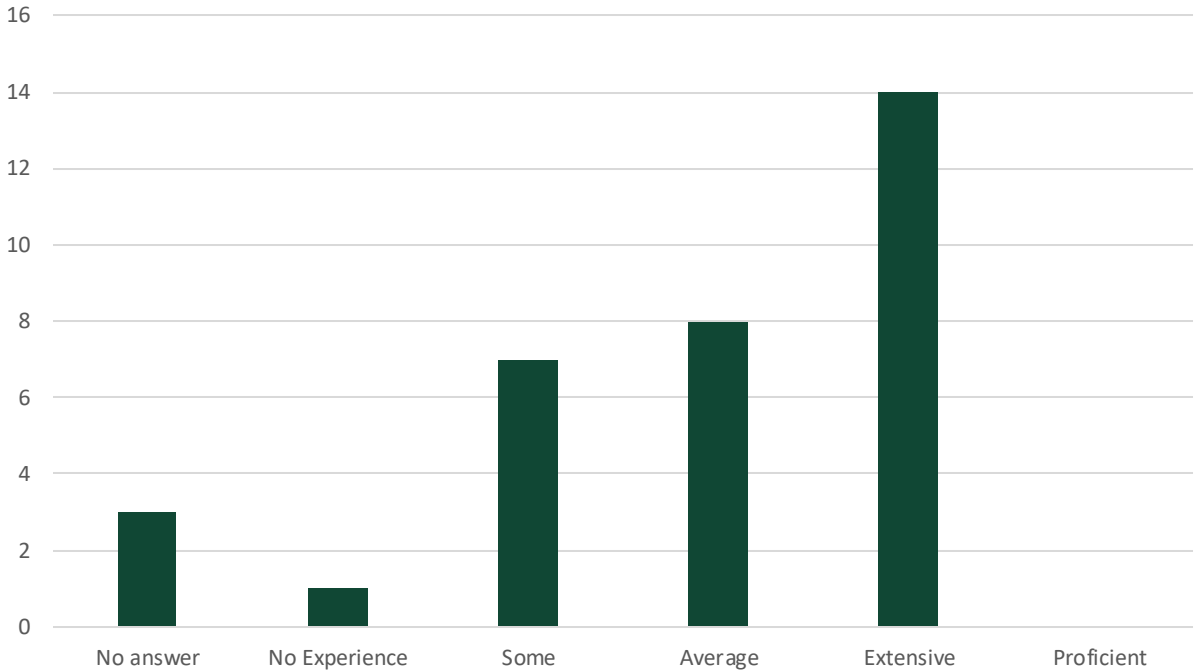


SHAREPOINT TRAINING & PROFICIENCY

COMPLETED SHAREPOINT TRAINING

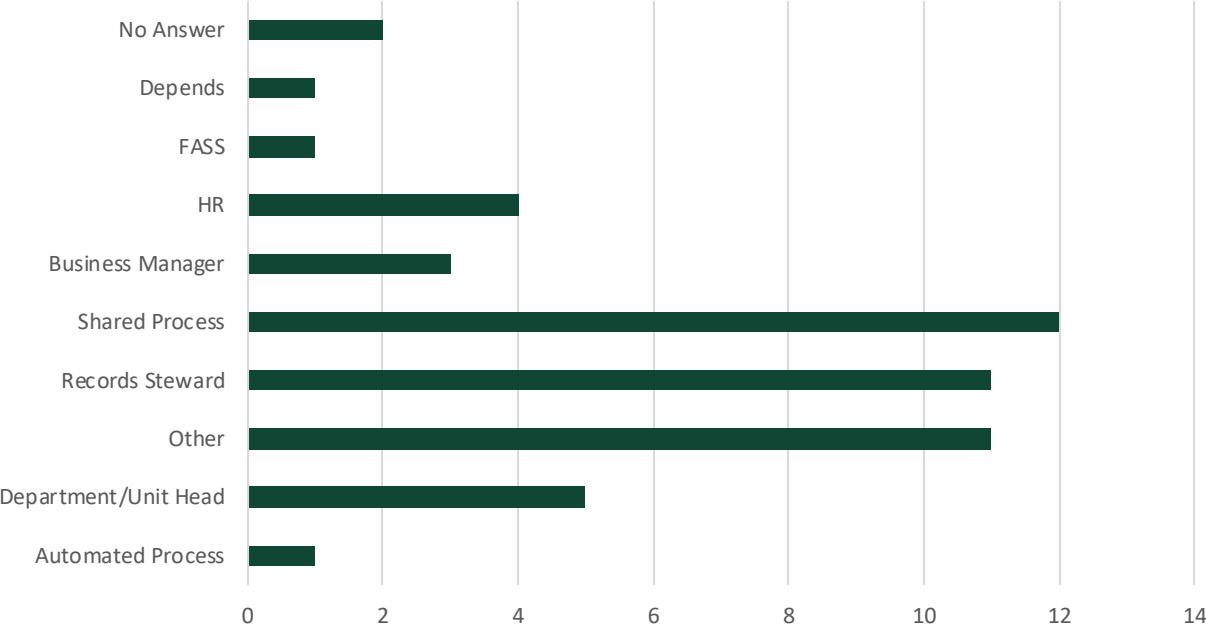


SELF-RATED SHAREPOINT PROFICIENCY

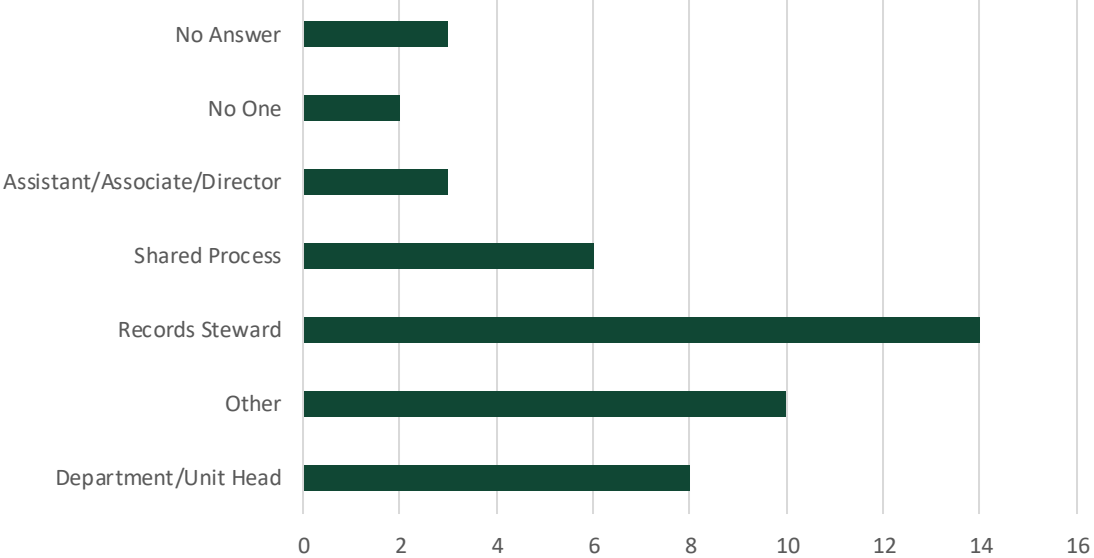


RECORD RESPONSIBILITY

WHO STORES HR RECORDS



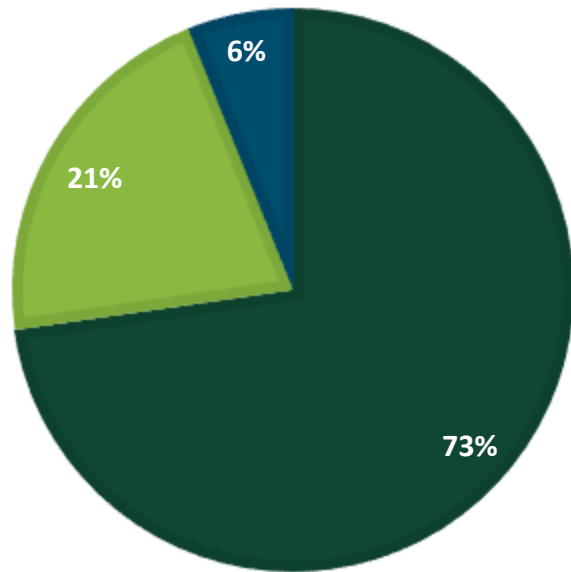
WHO REVIEWS RECORDS FOR RETENTION



RECORD PURGING & WISH LIST COMMENTS

HOW ARE RECORDS PURGED

■ Manually reviewed and removed ■ Other ■ No Answer



- A system to filter documents based on their contents which trigger different retention times.
- Storage for documents in "one" place and "one" process.
- A system that could identify dates/type of documents to streamline the disposal process.
- SharePoint is great for collaborative application review and scoring. We could tag files for retention.
- All HR records stored by HR would be necessary and allow for automation of retention processes.



RECOMMENDATIONS

- Narrow the scope further / pick a process
- Form a working group to run process mapping and improvement
 - Determine whether SharePoint the right tool for that process
- Simplify the retention policy / translate it for the responsible parties
 - Send out bite-size reminders / hold a Data Destruction Day
- Create consistency in who is responsible and which tools to use for what purpose
- Continue (recommended, consistent) training, learning, and use of SharePoint
- Automate record entry and purging where possible and wise
- Build a community of practice starting in shared service hubs
- Share successes with the rest of campus to create standardization



Thank you! Questions?

