The evolution of record systems

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Unbroken records: Briefing day 20 May 2021

Digital Preservation Coalition

We will know records management is successful when….

…….we can roll out a cloud suite and say to our end-users:

- **SharePoint**
- **Email**
- **Teams channels**
- **Teams Chat**
- **Yammer communities**
- **OneDrive for Business**

Use whichever application you like! we know we can manage them all!

- **Gmail**
- **Chat**
- **Docs**
- **Hangouts**
- **Drive**

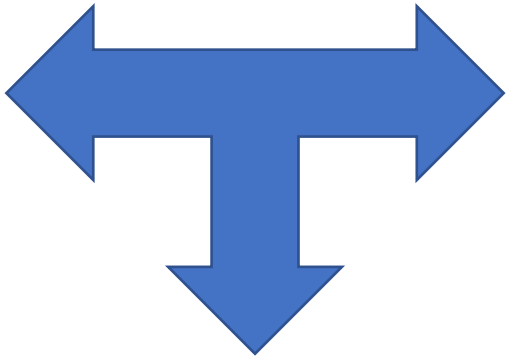
Widely regarded as manageable | **Widely regarded as unmanageable**

Always treated as a record system	Usually treated as a record system	Sometimes treated as a record system	Rarely treated as a record system
Corporate document management systems	Large corporate databases Line of business systems Collaboration systems	Email systems Filesharing applications (One Drive for Business, My Drive)	Chat systems

Shared spaces | **Individual-centric spaces**

RECORD SYSTEM TRADE-OFFS

MANAGEABILITY
The structure of the system supports the precise application of retention and access rules



USEABILITY
The structure of the application fits with the way the end-user wants to work

RELIABILITY
The application capture record routinely and comprehensively

Microsoft 365 records management model

SharePoint sites	**Email**
Teams channels	**Teams Chat**
Yammer communities	**OneDrive for Business**

Retention policies (to set defaults)
and
Retention labels (to identify exceptions)

Rules to adjudicate which label or policy takes precedence

Compliance centre

Site Actions | Browse | Page | Publish

Murphy, Clint

Team Site ▷ Home

Search this site

Home | test

Libraries
Site pages
Shared documents

Lists
Calendar
Tasks

Discussions
Team discussion

Welcome to your site

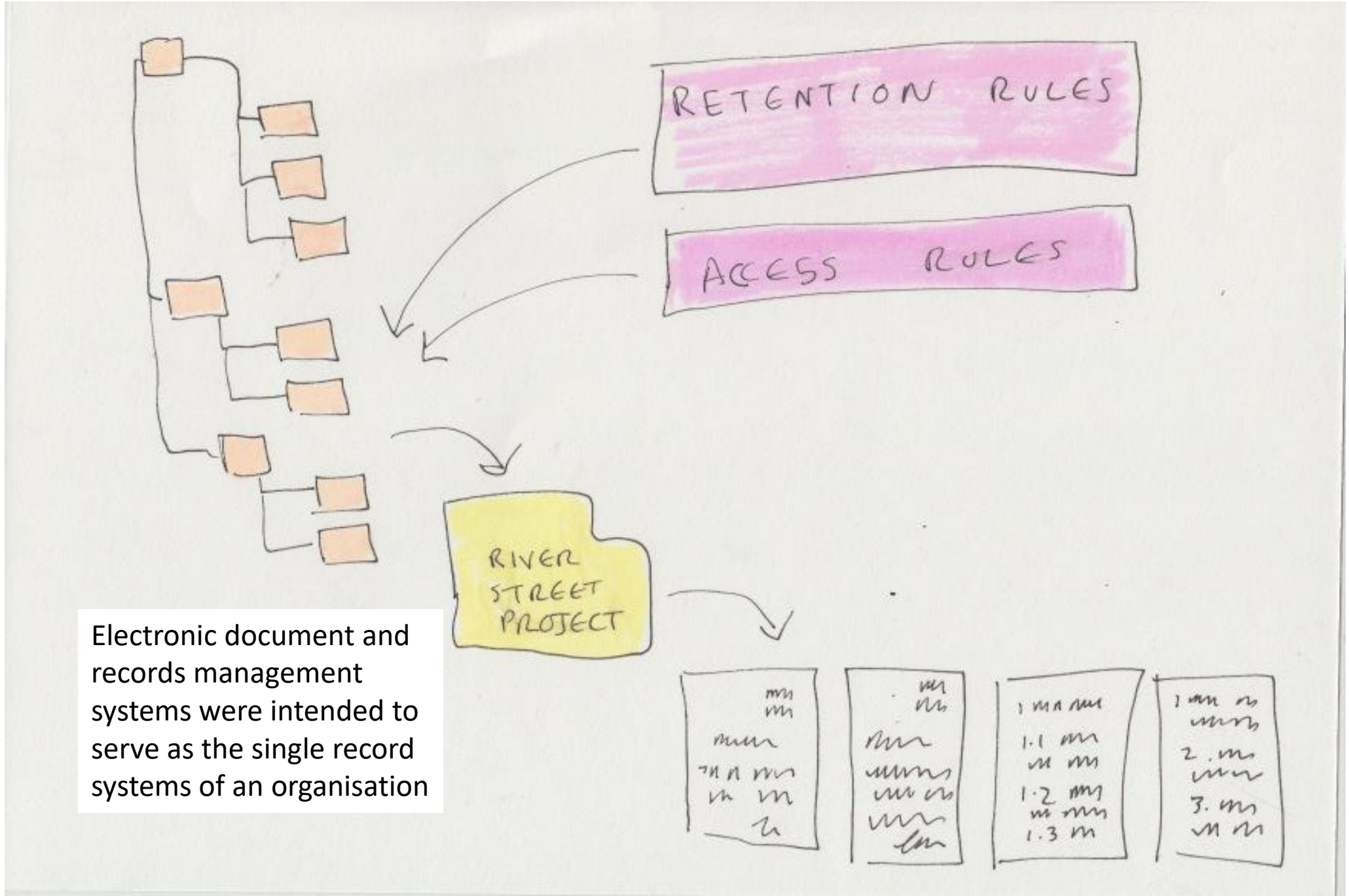
Add a new image, change this welcome text or add new lists to this page by clicking the Edit button above. Click on shared documents to add files

Shared documents

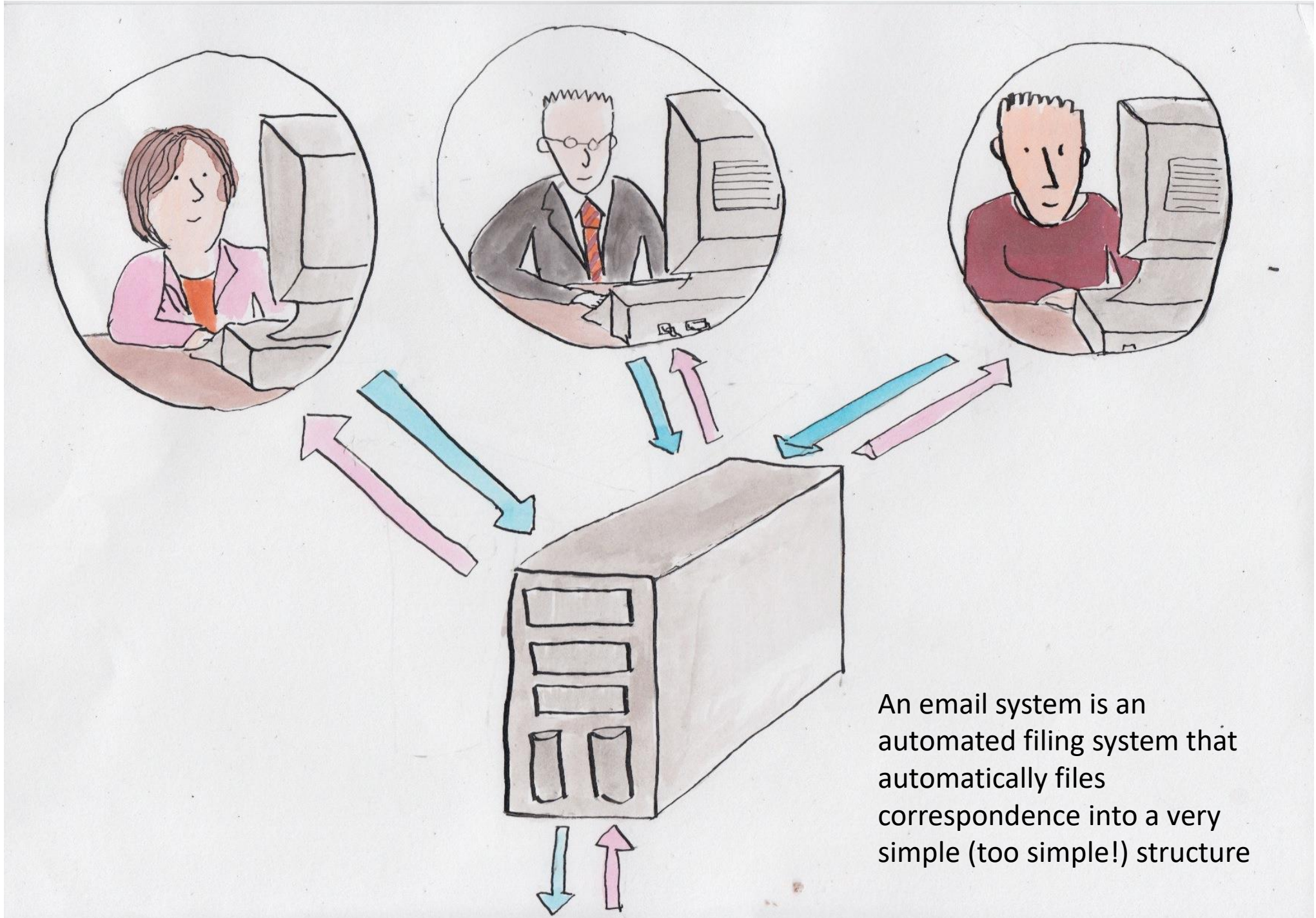
	Type	Name	Modified	Modified by

There are no items to show in this view of the "Shared documents" document library.

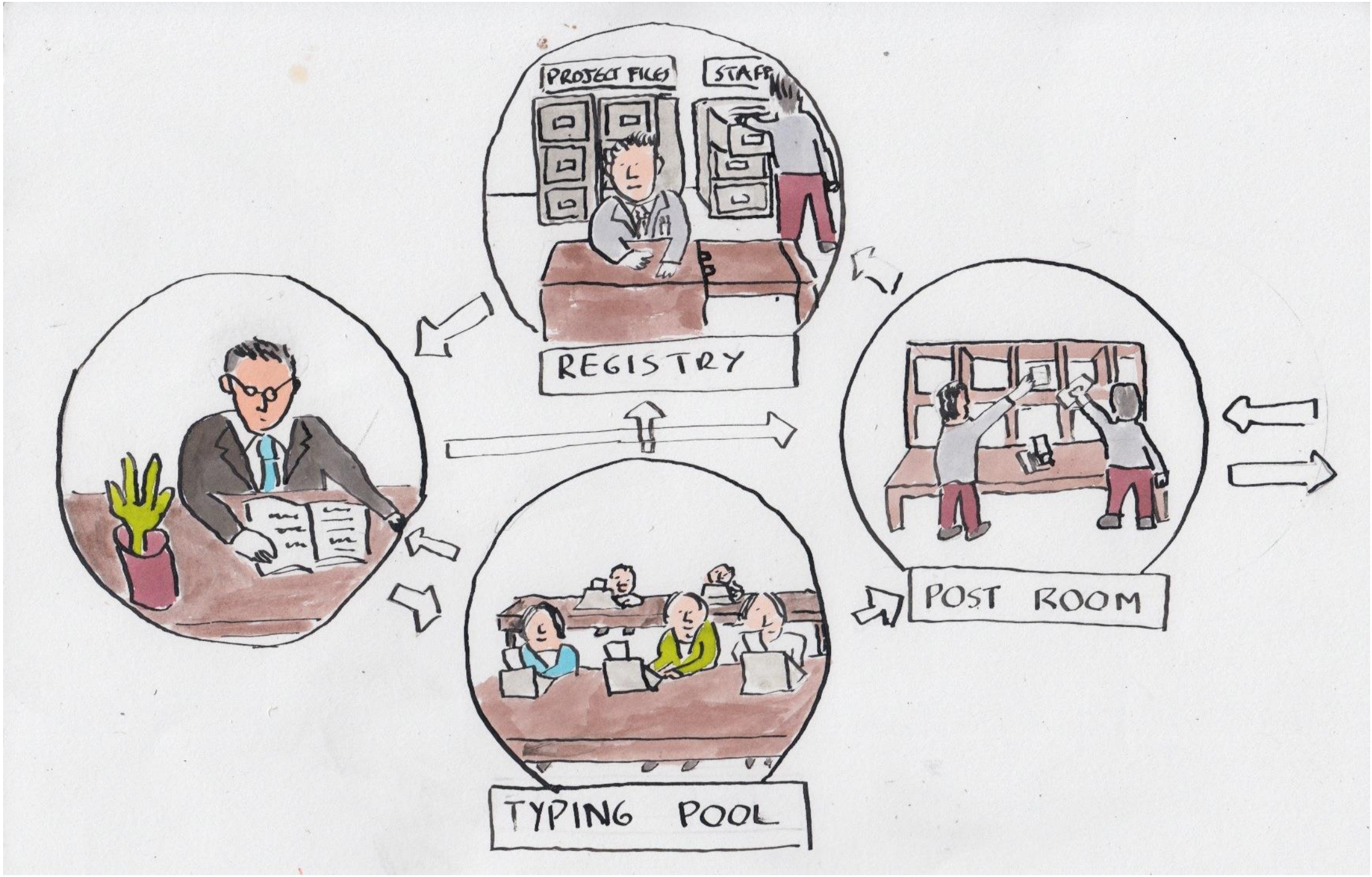
Add document



Electronic document and records management systems were intended to serve as the single record systems of an organisation

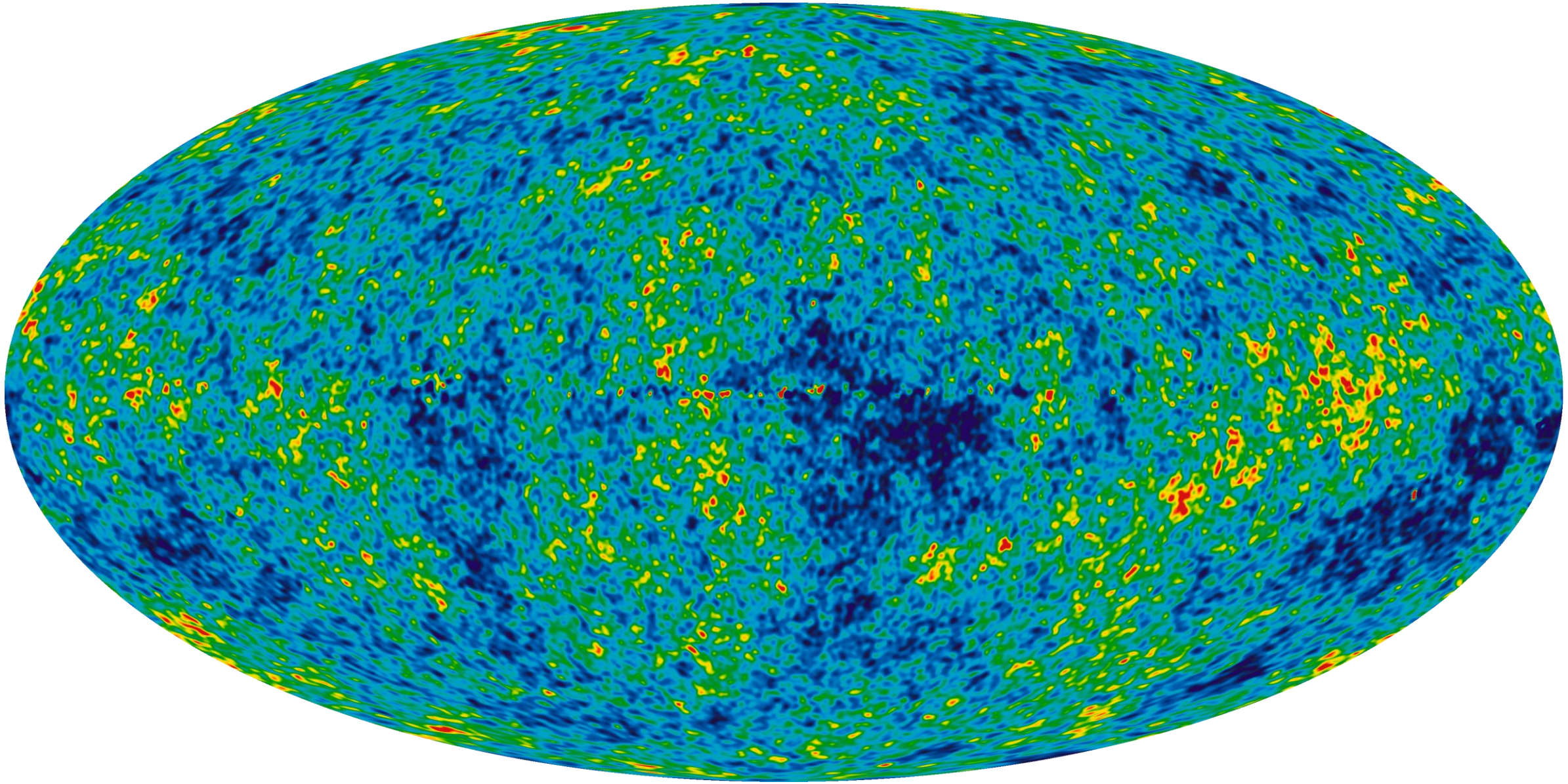


An email system is an automated filing system that automatically files correspondence into a very simple (too simple!) structure


PROJECT FILES
STAFF
REGISTRY
POST ROOM
TYPING POOL

THE ENGLISH ROYAL CHANCERY IN THE REIGN OF KING JOHN (1199 – 1216)
WHAT ARE THOSE?
THEY ARE ROLLS
.... WE HAVE TWO TYPES
CHEESE AND PICKLE? TUNA AND SWEETCORN?
NO. CLOSE ROLLS AND PATENT ROLLS
OUR CLERKS TAKE A COPY OF EVERY LETTER YOU SEND
IF THE LETTER WAS SENT CLOSED WE SEW THE COPY ONTO THE END OF A CLOSE ROLL. IF IT WAS SENT OPEN WE SEW THE COPY ONTO THE END OF A PATENT ROLL

travelwayoflife - https://www.flickr.com/photos/travelwayoflife/6164348161/in/photostream/. Quebrada de las Conchas, Salta (Argentinien).



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