



**TRIM9**  
Content Manager

# ***Tips & Tricks***

## **SharePoint**

With SharePoint becoming more widely adopted and utilised across the University; we want to make sure you understand its purpose and why TRIM is still the appropriate place to store your records long-term.

The purpose of SharePoint is to provide a space for collaboration on electronic documents and records; it is not a compliant records and document management system. TRIM (the University's approved electronic document management system) by design meets recordkeeping, accountability, governance and legislative requirements while maintaining and providing appropriate access to records over time.

To ensure good governance and regulatory compliance records should be moved into TRIM and not managed long-term in SharePoint.

## **Items to Consider...**

- Final, approved versions of documents should be moved to TRIM while drafts can be stored in SharePoint (except draft policy documents, these need to be stored in TRIM).
- Vital records or high value/high risk records such as reports, strategies, plans, committee records, project documentation and meeting minutes should be stored in TRIM.
- Background notes and reference materials used to prepare and complete other documents can be store in SharePoint, along with other facilitative information that has little or no on-going value to the University.
- Do not store records in SharePoint that contain personal, sensitive, or highly restricted information (refer to [Information Security Data Classification Procedure](#)).
- Ensure correct permissions and access controls are applied to restricted information in both SharePoint and TRIM and these are reviewed regularly.
- Establish on-going business processes to ensure SharePoint document libraries are regularly reviewed and records are moved to TRIM as required.

If you have any questions about TRIM, SharePoint and your recordkeeping responsibilities please email [Records Governance Services](#) or telephone 4921 5306.