SharePoint to ERMS

Integration Setup User Guide

This guide outlines the technical and user actions to set up an integration that copies documents from SharePoint sites to ERMS folders

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Background

ANU uses Microsoft O365 products, including SharePoint, to support collaboration and effective work processes. To ensure records of University business are managed as a corporate information asset for the required time, any records created In SharePoint should be saved In the enterprise records system ERMS. A SharePoint-ERMS integration tool has been develop d to reduce manual processes and facilitate easy saving of records to the enterprise records system.

Benefits of using the Integration tool are:

- Improved efficiency - process of saving records In ERMS Is automated
- Improved access over time - search tools In ERMS provide better retrieval of records In context of other University activities
- Increased compliance and confidence in integrity of the record - ERMS manages retention and disposal of records to meet external obligations

ERMS-SharePoint set up procedure

Step 1 Confirm ERMS destination folder

The Integration tool copies documents from the SharePoint site to a specified folder In ERMS.

- Confirm that there is a suitable folder In ERMS by searching or navigating. Seek assistance from your local Power User or the Records team records@anu.edu.au as needed.
- If a folder does not exist, request that your Power User or Records create the folder/s with required title and security.

Example destination folder:

> ANU - Governance - Committees - Academic Quality Advisory Committee

Step 2 Modify SharePoint site permissions

The Integration tool requires permission to copy documents from the site for ERMS. The SharePoint Site Owner gives permission by copying and pasting text to the App inventory for the Site.

1. Log In to Office 365 at ANU and go to your SharePoint site. You will need to edit the URL of the site to get to the permissions page.
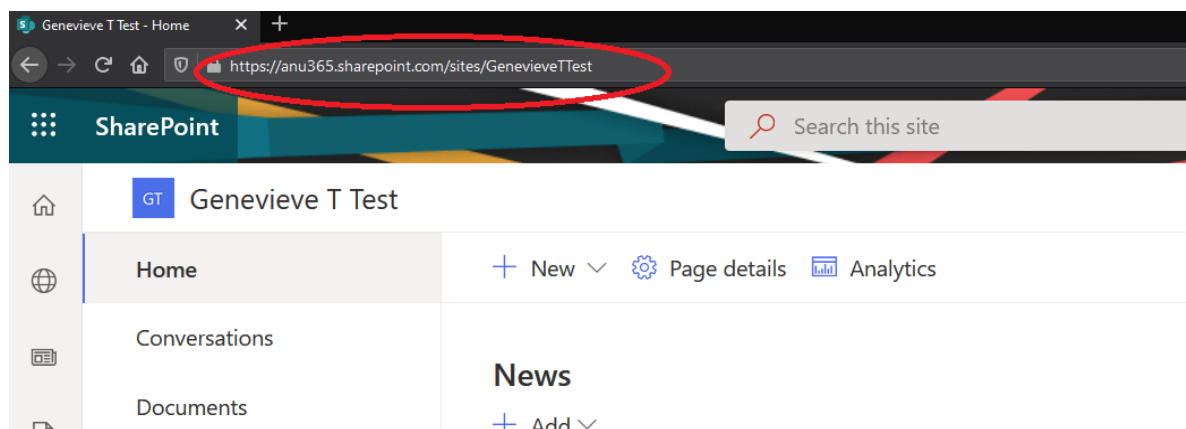
2. Update the URL by adding this text at the end:

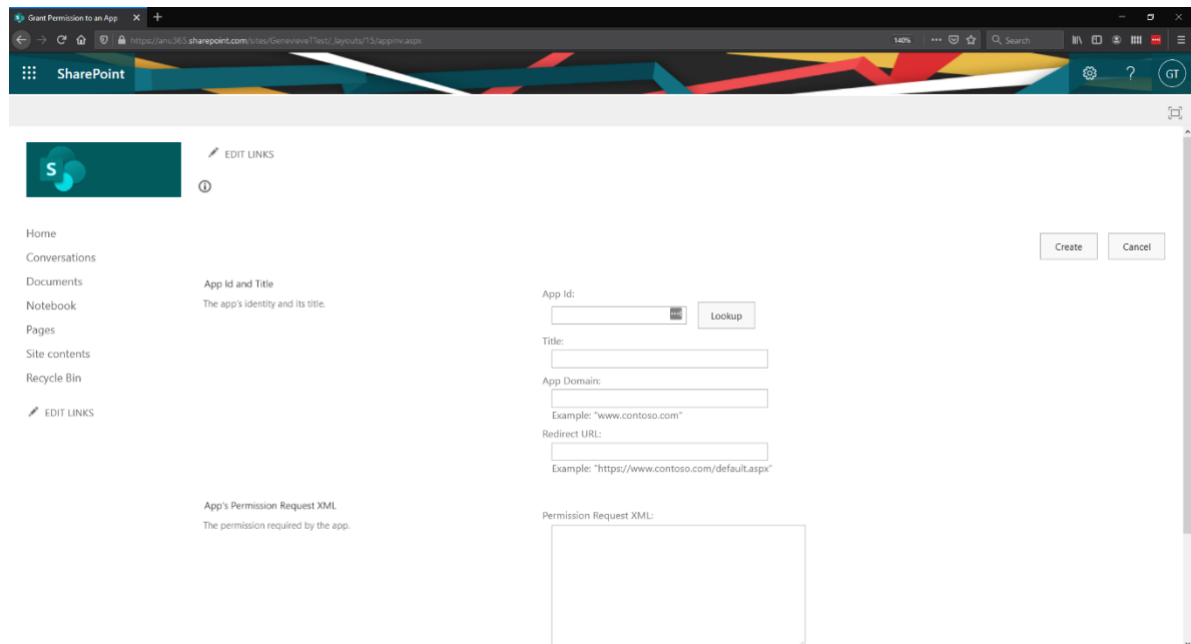   **_layouts/15/appinv.aspx**

Your URL will look like:
https://anu365.sharepoint.com/sites/<NAME OFSITE>/_layouts/15/appinv.aspx

For example for the "Genevieve T Test" site this URL would be

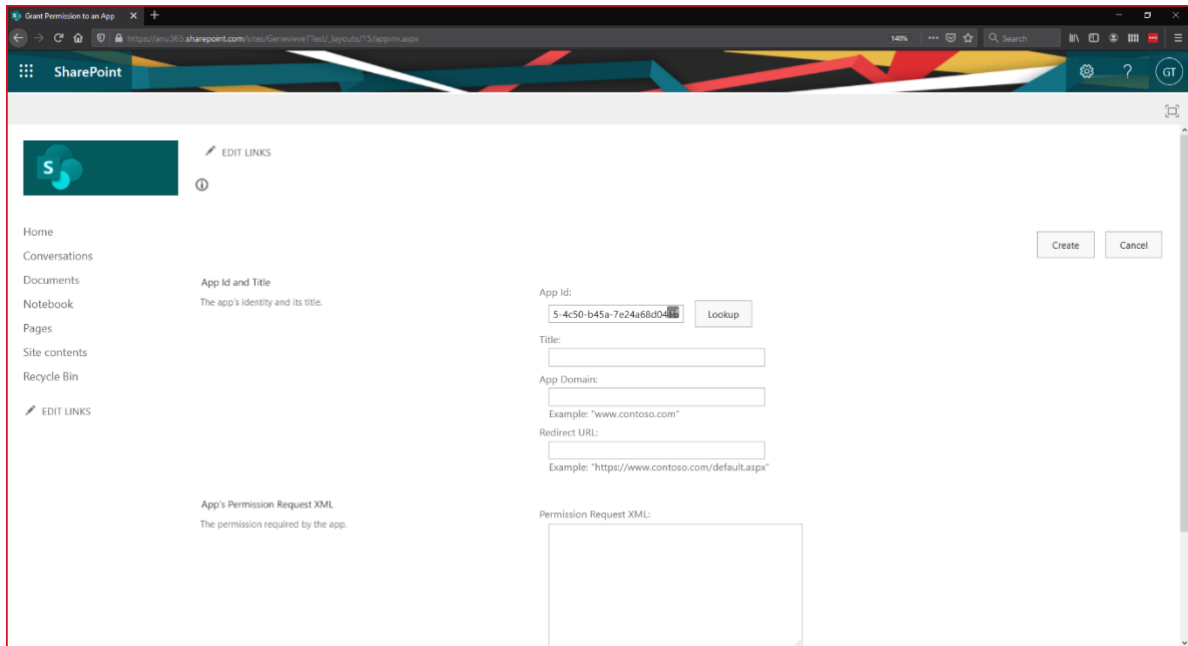`https://anu365.sharepoint.com/sites/GenevieveTTest/_layouts/15/appinv.aspx`

3. Go to the new URL. It will take you to a page to 'Grant permission to an App':
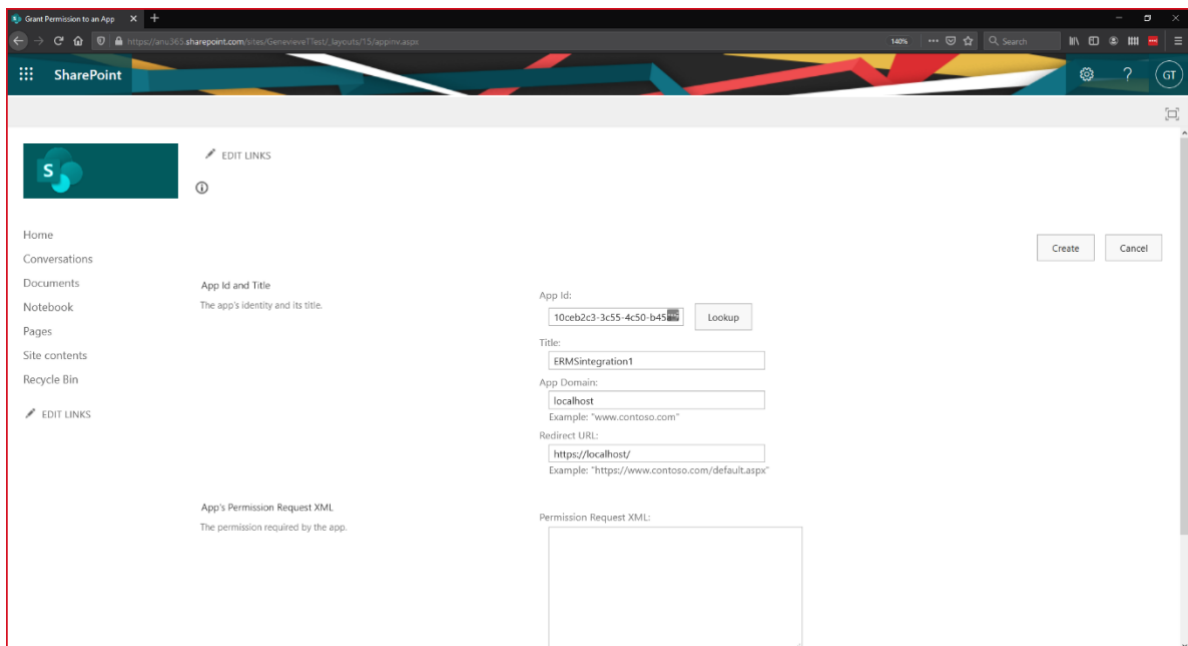

4. You now need to copy and paste some text into fields on this page.

Copy and paste the following value into the "App ID" field (the first box) as shown In the screenshot below

`10ceb2c3-3c55-4c50-b45a-7e24a68d041b`

5. Click the Lookup field. This will populate Information in the fields below the App Id such as "Title: ERMSintegration1"


6. Copy and paste the following text XML/Text Into the "Permission Request XML" field (box at the bottom)

```
<AppPermissionRequests AllowAppOnlyPolicy="true">

<AppPermissionRequest
Scope="http://sharepoint/content/sitecollection/web" Right="Read" />

</AppPermissionRequests>
```

Your screen should look like the image below.
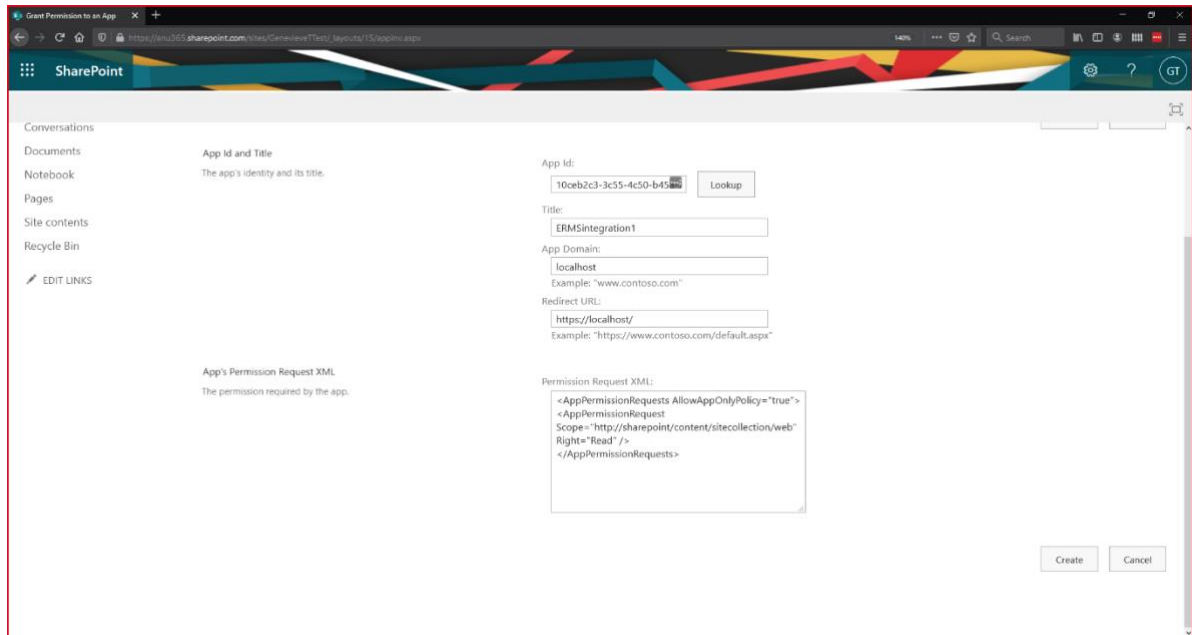
7. Now click the 'Create' button on the right side of the page This will send you to a page asking whether you trust the ERMS integration application. Click on "Trust it".
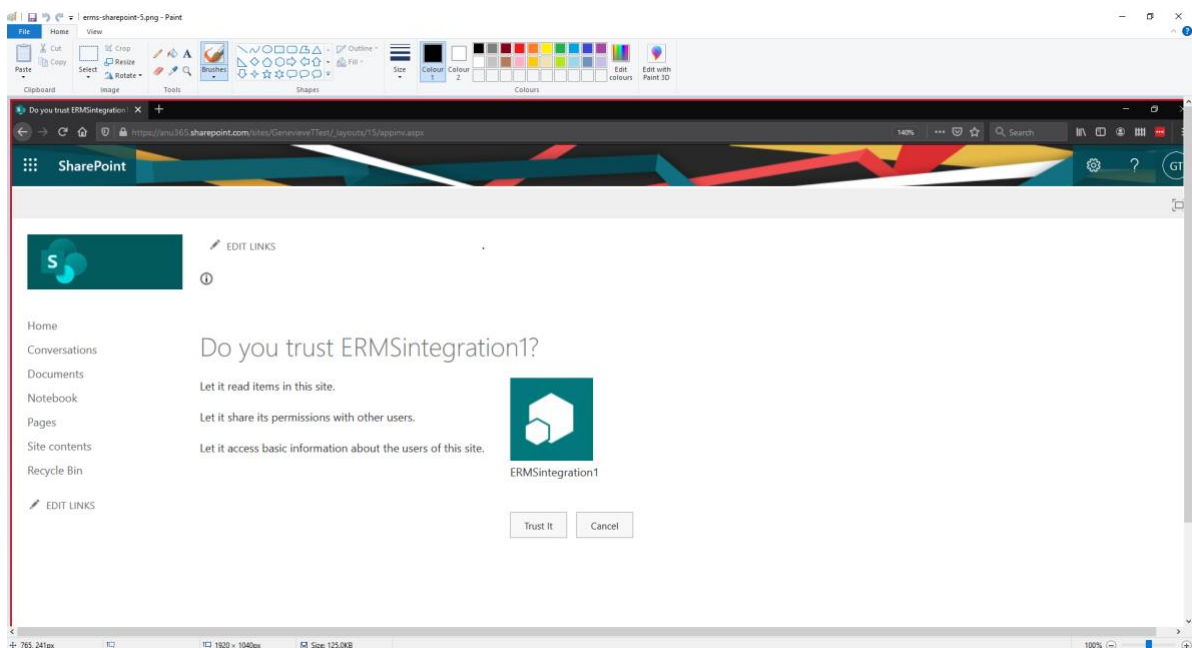
It will then return you to the settings page of your Site. This step is now complete.

Step 3: Linking your SharePoint site to ERMS

After providing the "ERMSintegration1" application permissions on the site, you will need to request that the SharePoint site be linked to the ERMS folder.

1. Send an email to erms.admin@anu.edu.au with the subject "SharePoint to ERMS integration" and include:

   - the URL of your SharePoint site

- the ERMS folder location <Function - Activity - Folder name>.
  For example <Governance - Committees - Academic Quality Advisory Committee>

2. System administrators will add your SharePoint site to the integration list and document copying will commence overnight. You will receive notification that your site has been added.

Once Integration is in place, any new or changed documents will be copied from SharePoint to ERMS. Documents are securely retained In ERMS and are searchable within security settings of the folder. SharePoint copies may be disposed of once the documents have been copied to ERMS.