

# Records Management Project Deep Dive

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May 2025



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# Implementation of a Records Management Solution

## Background...

The Records Management Project was started in 2021, to understand how compliant the organisation was in relation to Records Management legislation and to improve the efficiency of records retention and retrieval.

- The results of the first review identified that the organisation was not compliant with legislation and there was no standard approach to how documents and records were held.
- Following a further review to identify a suitable EDRMS, in January 2023 the Business Executive Team approved the recommendation to implement SharePoint Online.

## The project achievements...

All Directorates have transitioned to SharePoint Online as their main document management system. The transition has been completed for the majority of Directorates.

All Directorates now having working document management spaces, with some work left to do, to embed the solution as business-as-usual practice.

The Records Management Team are continuing to work across the Organisation to evolve and adapt these spaces, to ensure they are fit for purpose and the ever changing needs of the Organisation.

## What did the transition entail?

The Records Management Team have created and developed site structures based on the individual needs of Directorates and Divisions.

All Directorates have been offered:

- End User Training for all staff
- Super User Training for staff with responsibility for managing their SharePoint Site.
- Ongoing support with site development and additional training as and when required.

# Case Studies:

In addition to general records management, SharePoint has given us additional features for collaborative working...

- **Health Protection Incident Management**
  - Libraries created ready for major incident document storage.
  - SharePoint site created for the purpose of documentation transfer from a third party.
- **User Centered Delivery**
  - PHW accessible document store for publication of discovery work
- **Screening Cross Programme**
  - Cross working site for the Screening programmes and the ongoing work with other directorates, stakeholders from Health Boards and connecting services.
- **Business Improvement and Transformation**
  - Cross Organisational collaboration site for Business Improvement and Transformation opportunities and priorities

Version Control

Collaboration

Impact to Data Breaches

Security

Benefits and Improvements

Openness and Transparency

Retention and Destruction

Cloud Based

Incident Management

## Next Steps:

The ongoing role of the Records Management Team will be:

- To embed SharePoint as the Organisational standard for Records Management.
- Encouraging the use of SharePoint for data and information sharing with trusted partners where possible.
- Increasing the scope of the Retention and Destruction schedule, so staff are better informed on what records need to be retained, archived and what can be deleted and destroyed.
- Introduction of an Audit process, to ensure the solution has embedded and we future proof Records Management for Public Health Wales.



**Thank you for listening.  
Any questions?**