



BeeCon 2016

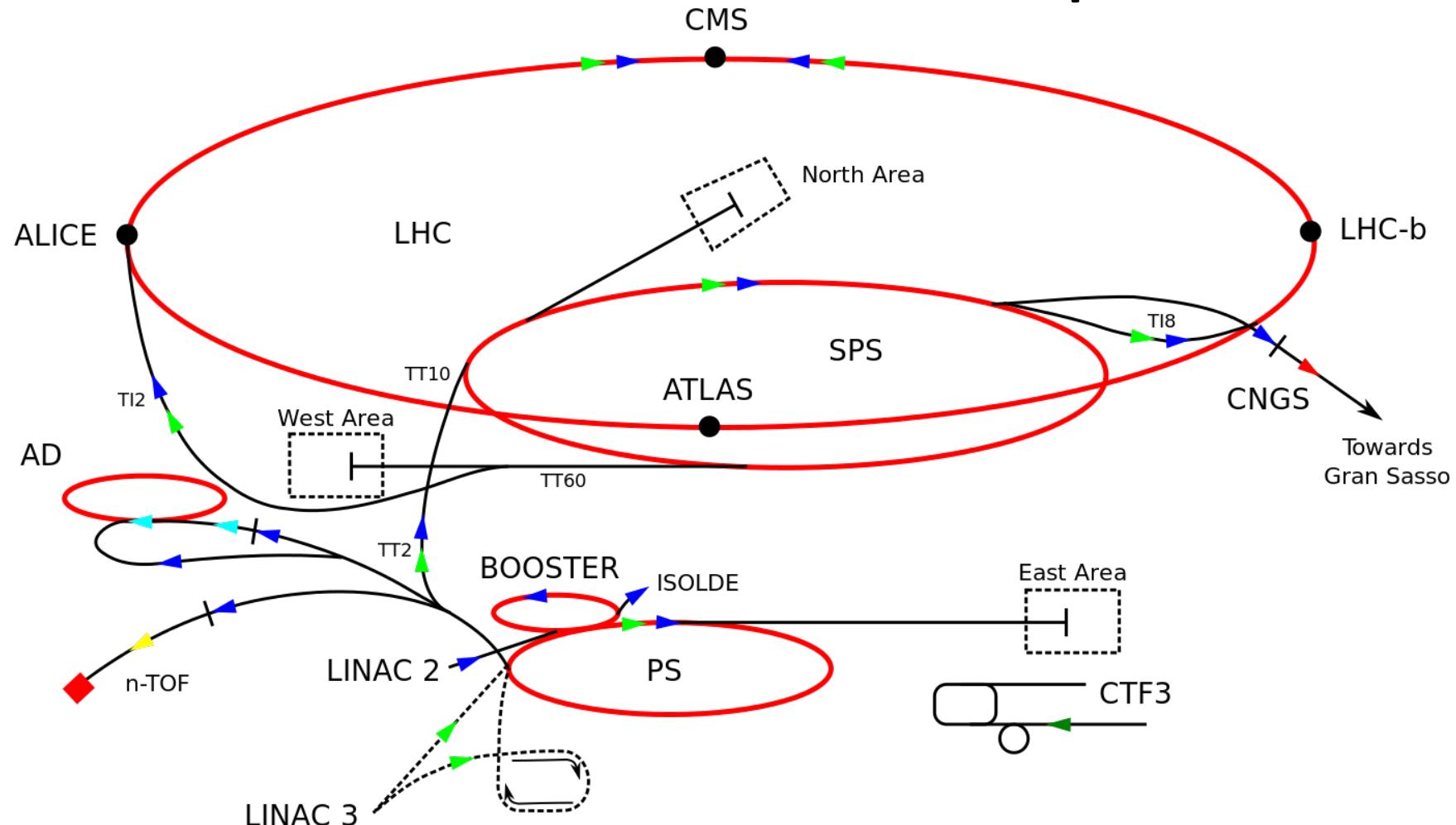
Case Study

Accelerating records management at CERN

Andrew Short

andrew.short@cern.ch

CERN Accelerator Complex



- ▶ protons
- ▶ antiprotons
- ▶ ions
- ▶ electrons
- ▶ neutrons
- ▶ neutrinos

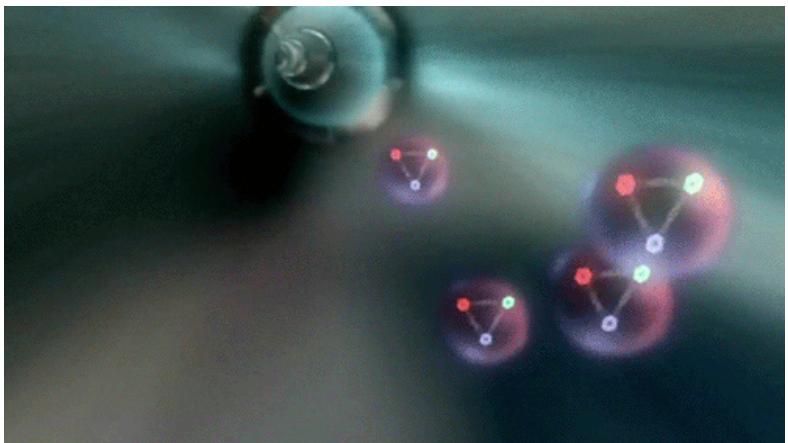
- PS Proton Synchrotron
- SPS Super Proton Synchrotron
- LHC Large Hadron Collider





CERN

- Worlds biggest machine
- Hottest, coldest & emptiest place in the solar system
 - 100,000 hotter than the sun
 - 271.3°C (1.9 K) colder than outer space
 - 10x less than the pressure on the Moon
- Fastest race track on the planet
 - 99.999991% the speed of light
- Most powerful supercomputer in the world
 - Using the grid
- Where the web was born



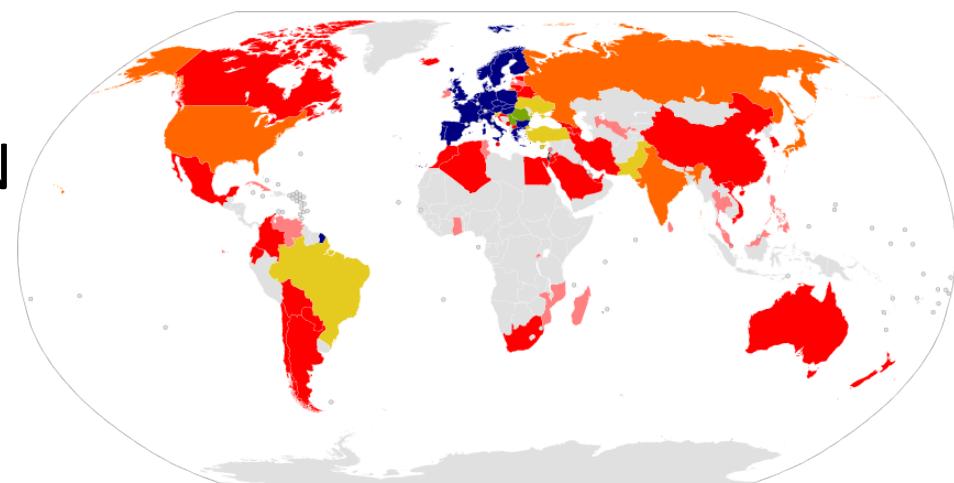
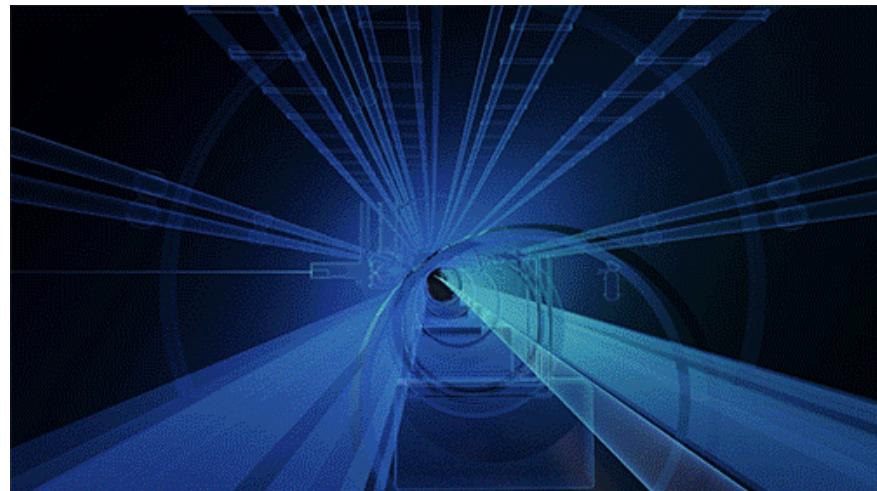


CERN Members of Personnel

- 2,500 Staff
- ~1,600 Other personnel
- 12,000 Visiting scientists

- 608 Universities
- 127 Nationalities

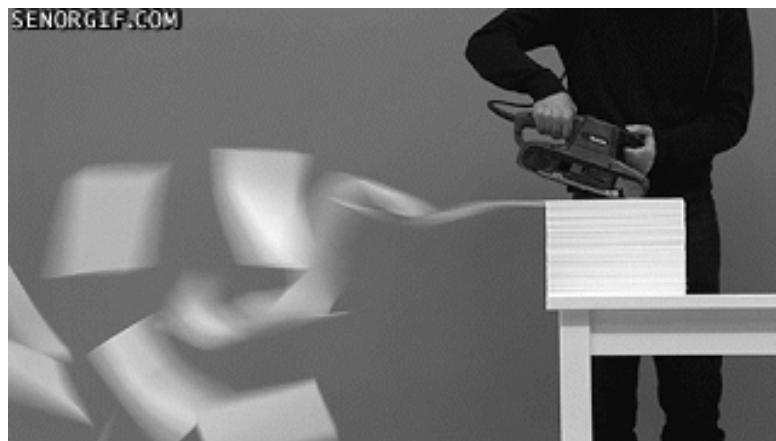
- 21 Member states of CERN





CERN Members of Personnel

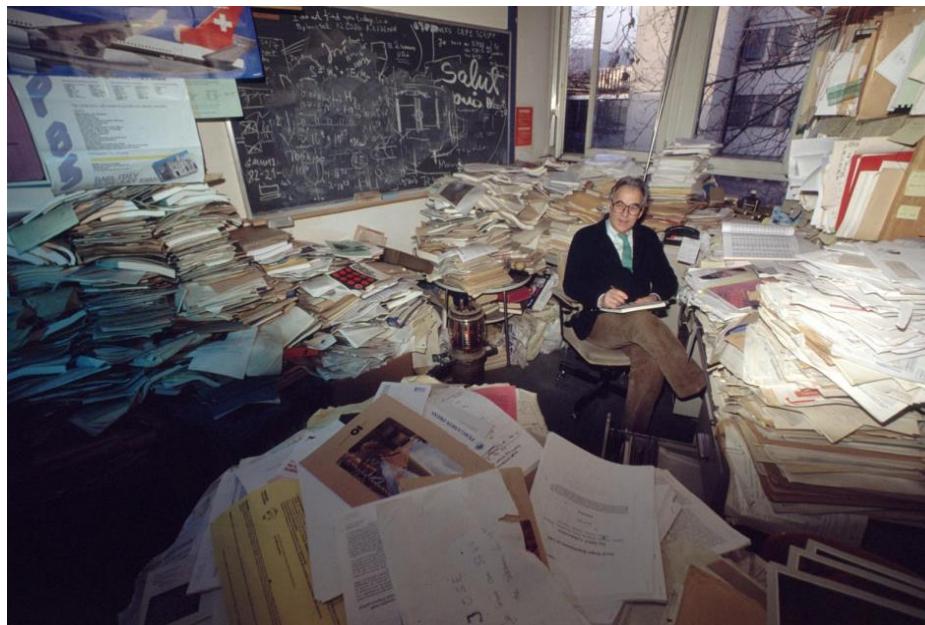
- 18,000 distinct online users per year



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CERN Members of Personnel



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Records Office



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Records Office - Then



- Store all personnel records
 - Initially on a single card, then folders
- Personnel records grew quick.
- Paper index file to retrieve personnel file.



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Records Office – 2015



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Records Office – 2015

- Started scanning of active personnel files
- Scanned over 3,000 personnel files
- Using naming convention / bulk upload
(DOCID;PERSONID;INITIALS; EFFECTIVEDATE)
- Started collecting new documents as PDF's only
- Over 230 types of document identified
- Changes in organisation workflows
- Temporarily emailing documents between services
(rather than internal mail)



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Records Office – 2016



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Records Office – 2016

- Using Alfresco on production (4th May 2015)
- Uploading active personnel files
- Easily store and retrieve documents
- Saves time and resources
- No more printing and mailing documents
- Process related improvements
- Uploaded over 75,000 documents



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Recruitment Unit

- Upload documents to Alfresco
- Share files with Records Office
- Documents injected to Alfresco from recruitment tool (eRT)
- Currently injected over 52,000 documents from eRT (April 2016)



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Interface



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Home

ePersonnel

Andrew Short

Search files, people, sites



Andrew Short Dashboard



My Sites

All

Epersonnel
(None)

★ Favorite

Create Site

My Activities

Everyone's activities

all items

In the last 7 days

Today



Andrew Short previewed document [Diploma-700632-2015 \(2015-1426779998176\)](#) in [Epersonnel](#)
13 minutes ago
1 more ▾



Andrew Short downloaded document [Diploma-700632-2015 \(2015-1426779998176\)](#) in [Records Management](#)
29 minutes ago
5 more ▾



Andrew Short previewed document [Diploma-700632-2015 \(2015-1426779998176\)](#) in [Epersonnel](#)
about an hour ago

My Tasks

Active Tasks

Start Workflow

Active Tasks | Completed Tasks



Review the tasks assigned to you

Different types of tasks can appear in this task list and you need to address each one. This could involve reviewing a document or simply accepting an invitation to a site.

My Documents

My Favorites



Keep track of your own content

This dashlet lists all of the content that's important to you, no matter which site it is in. Use the filters to easily find what you're looking for.



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Home

ePersonnel ▾

Andrew Short ▾

Search files, people, sites (X)

Epersonnel

Site Dashboard

Document Library

Site Members



▼ Documents

[All Documents](#)[I'm Editing](#)[Others are Editing](#)[Recently Modified](#)[Recently Added](#)[My Favorites](#)

▼ Library

[Documents](#)[E-personnel Homes](#)[576](#)[603](#)[700](#)[700632](#)[Certificates and Proof of Identity](#)[Passport](#)[Recruitment](#)[Diploma](#)[Reference letter](#)[705](#)[709](#)[Unrecognized](#)[Upload](#)

► Categories

► Tags

Select ▾ + Create... ▾ Selected Items... ▾

Documents > E-personnel Homes > 700 > 700632 > Recruitment > Diploma

	Diploma-700632-2011 (Lapin LAPIN 20-01-2011) Created 23 hours ago by ertupload 138 KB (None) No Tags ★ Favorite Like 0 Comment Share
	Diploma-700632-2011 (1) (Lapin LAPIN 02-02-2011) Created 23 hours ago by ertupload 1 MB (None) No Tags ★ Favorite Like 0 Comment Share
	Diploma-700632-2011 (2) (Lapin LAPIN 02-02-2011) [0] Created 23 hours ago by ertupload 1 MB (None) No Tags ★ Favorite Like 0 Comment Share
	Diploma-700632-2011 (3) (Lapin LAPIN 02-02-2011) Created 23 hours ago by ertupload 1 MB (None) No Tags ★ Favorite Like 0 Comment Share
	Diploma-700632-2012 (Lapin LAPIN 03-09-2012) Created 23 hours ago by ertupload 138 KB (None) No Tags ★ Favorite Like 0 Comment Share
	Diploma-700632-2013 (Lapin LAPIN 02-07-2013) Created 23 hours ago by ertupload 138 KB (None) No Tags ★ Favorite Like 0 Comment Share

[Download](#) [View In Browser](#) [Edit Properties](#) [More...](#)



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Home

ePersonnel

Shared Files

Sites

Tasks

People

Repository

Admin Tools

Debug Menu

Administrator

Search files, people, sites



Search

Site Dashboard

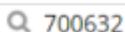
Document Library

Site Members

Search Manager



Search in: Repository



700632

Search

Filter by:

▼ Created

- Today 7
- This week 7
- This month 7
- In the last 6 months 7
- This year 7

▼ Creator

- Administrator 7

▼ Person

- Lapin LAPIN 1

▼ File Type

- JPEG Image 1
- Adobe PDF Document 5

▼ Modified

- Today 7
- This week 7
- This month 7
- In the last 6 months 7
- This year 7

▼ Modifier

7 - results found

Relevance



700632 (Lapin LAPIN) ⓘ
Modified 3 minutes ago by Administrator
Site: ePersonnel
In folder: E-personnel Homes/700



Diploma-700632-2012.pdf (Curriculum Vitae Europass) ⓘ
Modified 4 minutes ago by Administrator
Site: ePersonnel
In folder: Unrecognized
Size: 138 KB



Diploma-700632-2011 (1).pdf ⓘ
Modified 4 minutes ago by Administrator
Site: ePersonnel
In folder: Unrecognized
Size: 1 MB



Diploma-700632-2011-3.pdf (Curriculum Vitae Europass) ⓘ
Modified 4 minutes ago by Administrator
Site: ePersonnel
In folder: Unrecognized
Size: 138 KB



Diploma-700632-2011 (3).pdf ⓘ
Modified 4 minutes ago by Administrator
Site: ePersonnel
In folder: Unrecognized



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Home

ePersonnel

Andrew Short

Search files, people, sites



Epersonnel

Site Dashboard

Document Library

Site Members



Documents > E-personnel Homes > 700 > 700632 > Recruitment > Diploma



Diploma-700632-2015 (2015-1426779998176) 1.0

Modified by Andrew Short on Thu 19 Mar 2015 16:46:38 | Share

Download



▶ Document Actions

▶ Share

▼ Properties

Person concerned

Full name: Lapin LAPIN

Person Id: 700632

CERN Id: (None)

Person status: (None)

Contract end date: (None)

Organization unit: (None)

Document properties

Type name: Diploma

Type description: (None)

Organization unit: (None)

Person status: (None)

Start date: Tue 24 Mar 2015



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Why Share UI?

- Quickly onto production
- Out of the box functionality
 - Upload, dashboards, search, browse
- Limited user base
 - Easy to train & specialise
- Team of 3 people



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How?



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How?

- Identify existing organisation documents
- Identify document metadata
- Identify search requirements
- Define file plan
- Define access rights
- Identify UX customisations
- Records management vs Document management
- Community or commercial edition

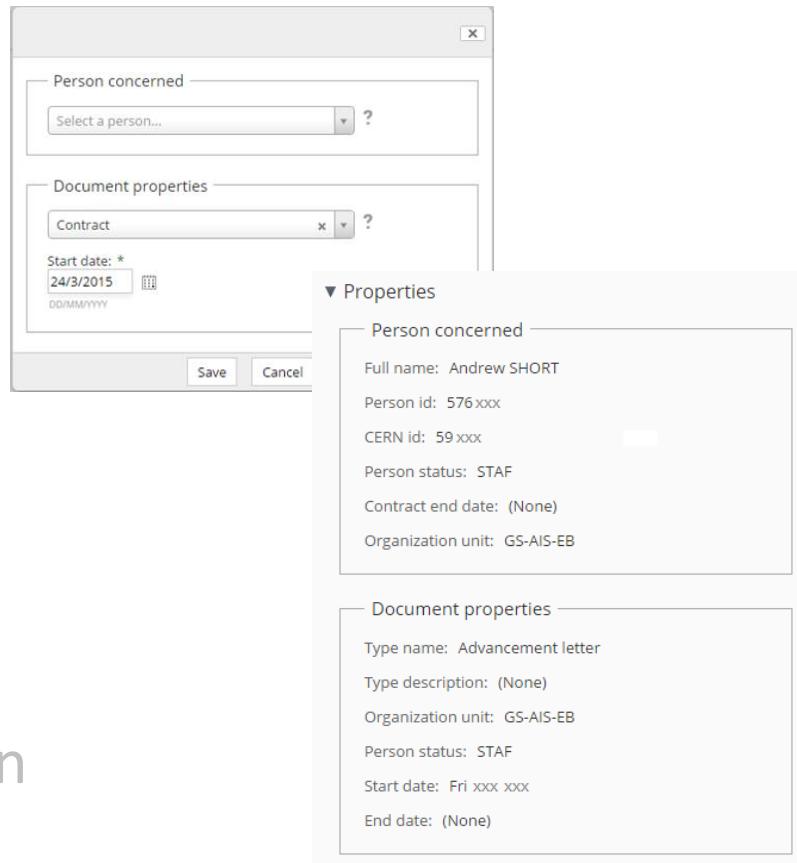


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How?

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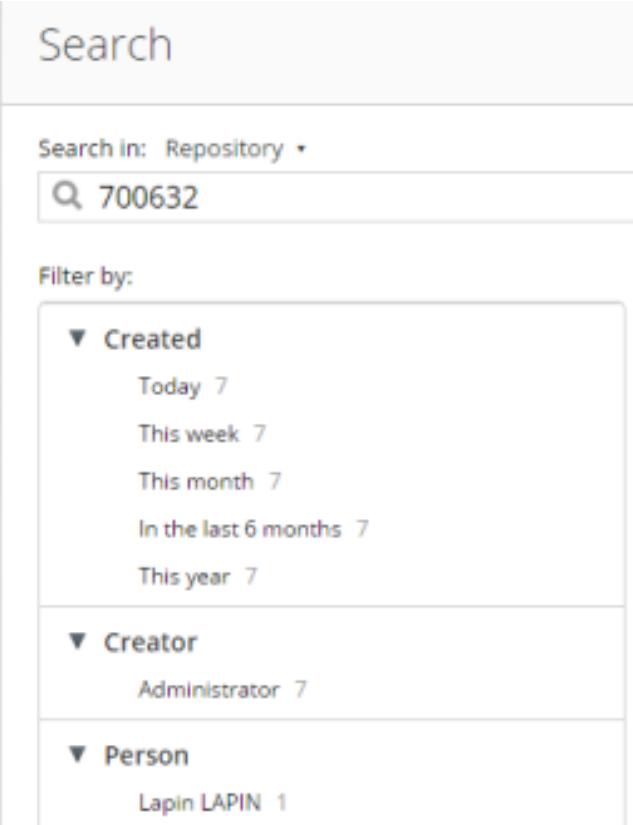


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How?

- Identify existing organisation documents
- Identify document metadata
- **Identify search requirements**
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Search

Search in: Repository ▾

700632

Filter by:

- ▼ Created
 - Today 7
 - This week 7
 - This month 7
 - In the last 6 months 7
 - This year 7
- ▼ Creator
 - Administrator 7
- ▼ Person
 - Lapin LAPIN 1

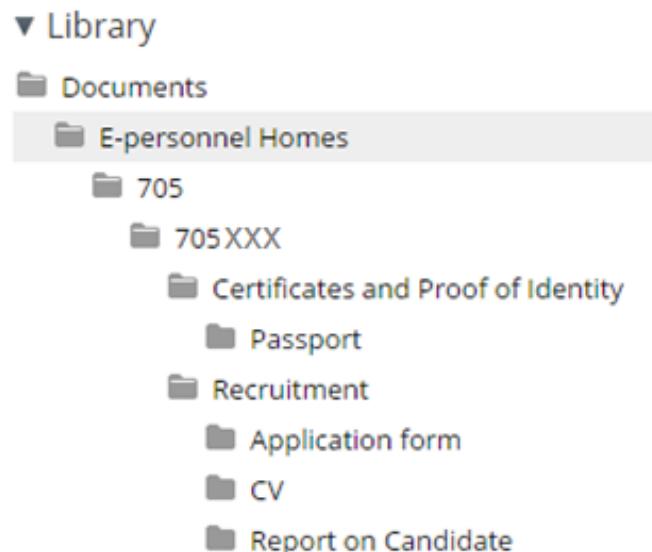


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- Define file plan
- **Define access rights**
- Identify UX customisations
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New Access Right

Document(s)*	Pension Attestation Start typing to get a list of possible matches
Start Date*	29/04/2016
Type*	Role
Value*	Role name
Notes*	CFO Chief Financial Officer CSO Cryogenics Safety Officer CTCO Cost to completion Officer DAO Departmental Administrative Officer
End Date	06/05/2016
Permission*	
Param*	

Cancel Save

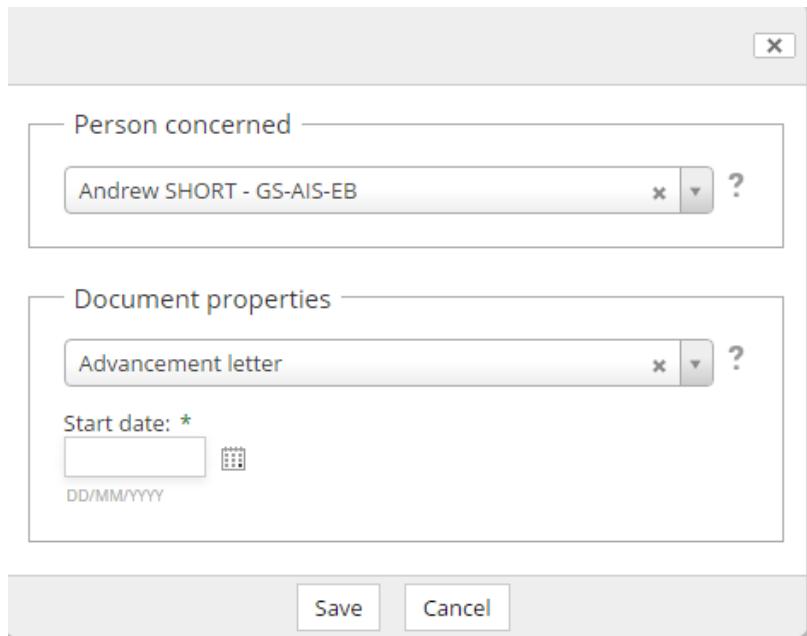


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How?

- Identify existing organisation documents
- Identify document metadata
- Identify search requirements
- Define file plan
- Define access rights
- **Identify UX customisations**
- Records management vs Document management
- Community or commercial edition



Person concerned

Andrew SHORT - GS-AIS-EB

Document properties

Advancement letter

Start date: *

DD/MM/YYYY

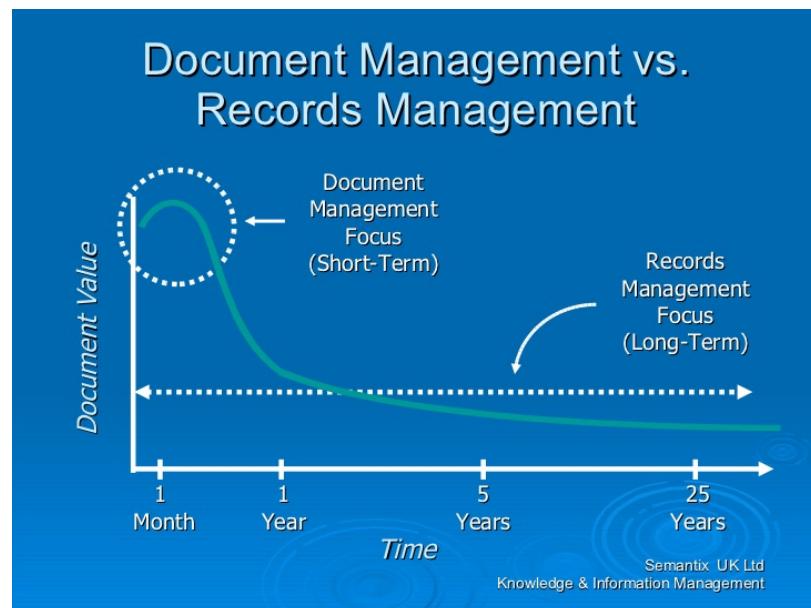
Save Cancel



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How?

- Identify existing organisation documents
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How?

- Identify existing organisation documents
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Alfresco in the Cloud

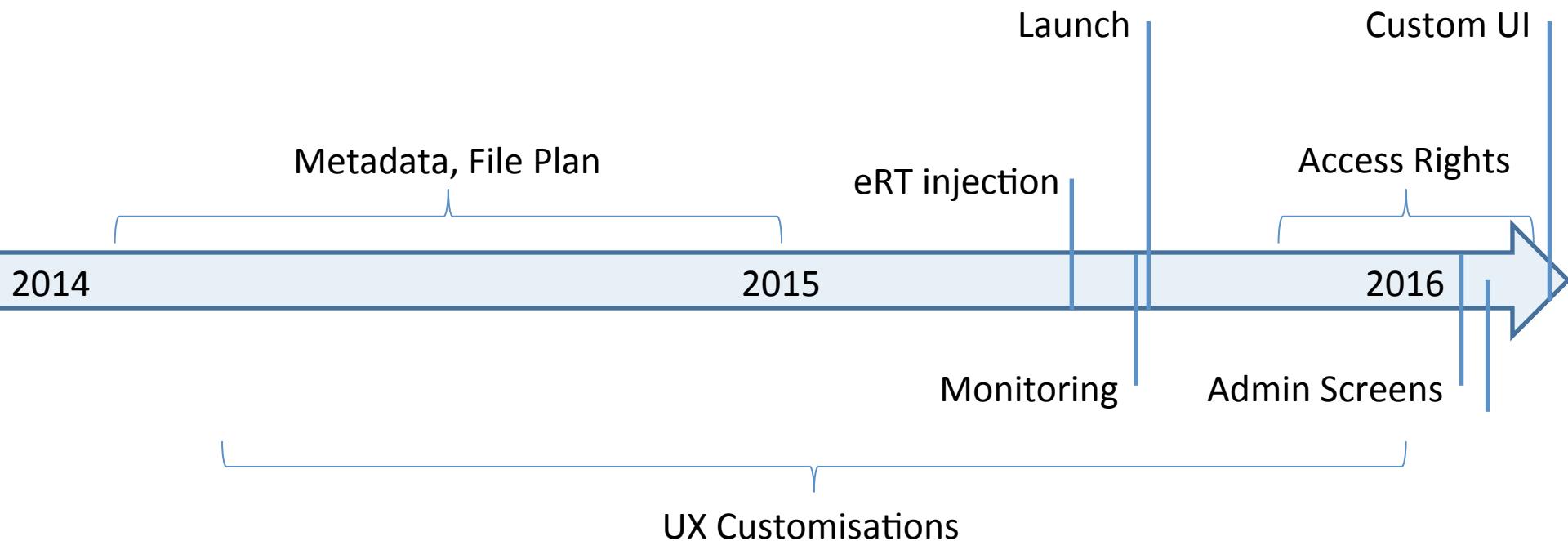
Alfresco One	Alfresco Community Edition
<p>Enterprise-class ECM platform</p> <ul style="list-style-type: none">• High availability, highly customizable ECM with simplified administration• Hybrid Cloud ECM with selective content-sync to the included SaaS Alfresco in the Cloud• Wide range of modules and add-ons including content encryption, records management, analytics and media management <p>Ideal for organizations that require enterprise-grade scalability, performance and 24X7 support for business critical content and compliance.</p> <p>Learn More</p> <p>Download</p>	<p>ECM for tech enthusiasts</p> <ul style="list-style-type: none">• Intended for developers and technical enthusiasts who want the power of Alfresco in non-critical environments• Open Source platform for community-driven development and contributions• Research vehicle for new features <p>Use in production only if resources exist to fully self-support. Consider Alfresco One instead if you require enterprise-class capabilities such as content encryption, clustering or simplified administration.</p> <p>Learn More</p> <p>Download</p>



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Time Line



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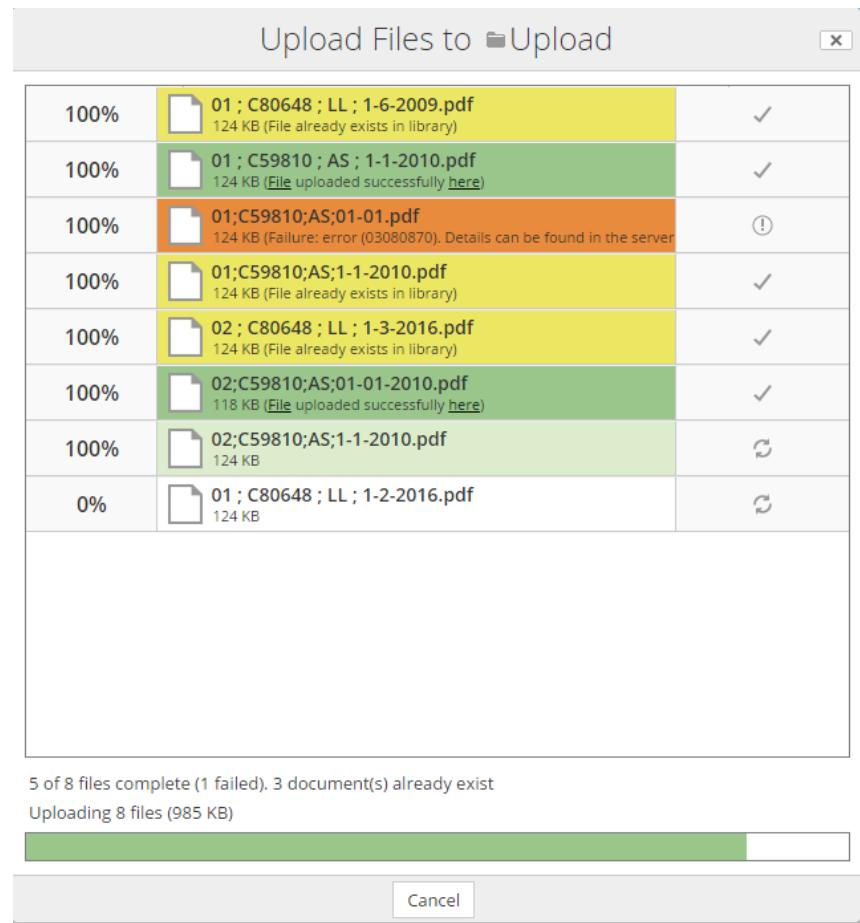
Customisations



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Customisations

- Upload
- Unrecognised
- Auto filing
- Access Rights
- Monitoring
- Admin screens

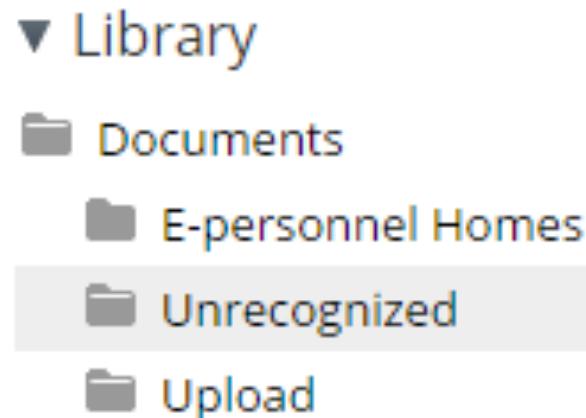


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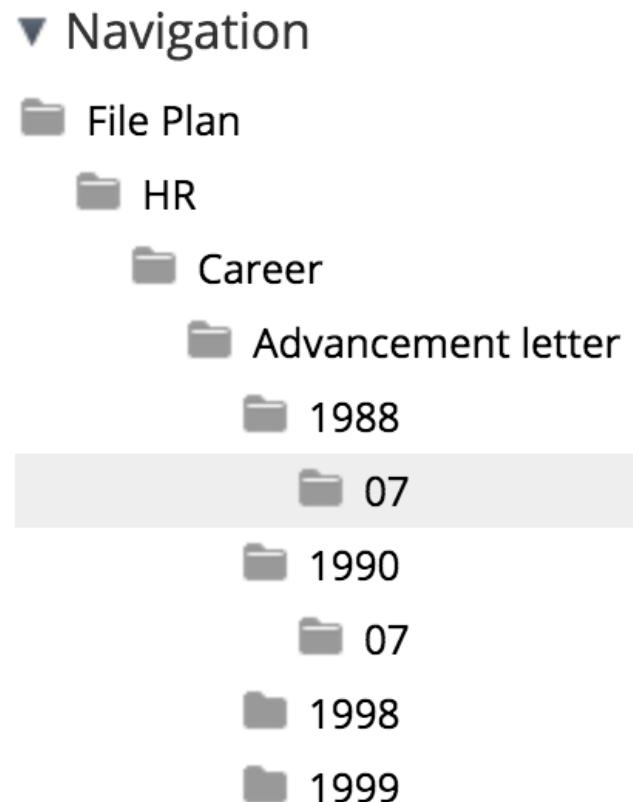


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Customisations

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File Admin Authorities Access Rights Document Definition

Search document access New Access Right

By document definition By authority Show expired

Pension fund certificate Start typing to get a list of possible matches Select one of the existing authorities

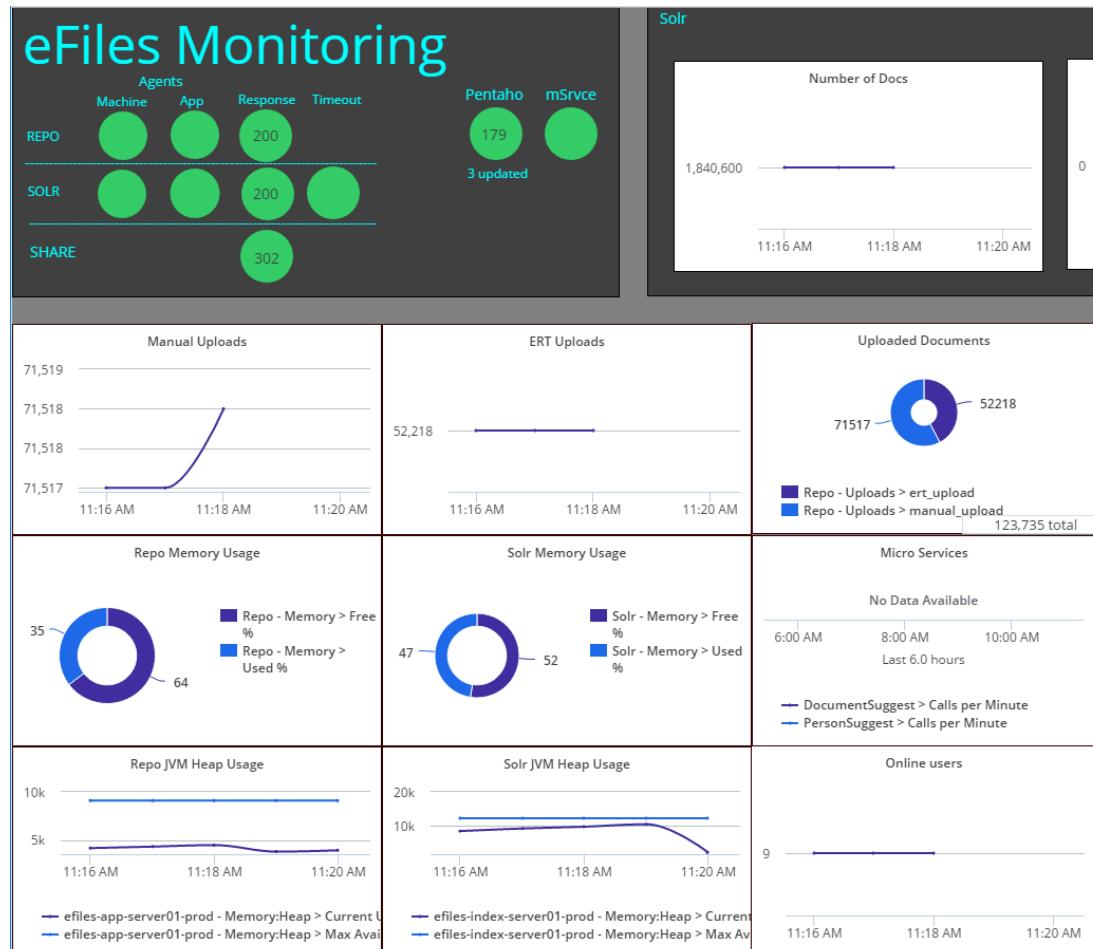
Name	Type	Value	Param	Start Date	End Date	Notes	Creation Date	Created By	Deleted Date	Deleted By	Permission	Actions
Pension fund certificate	egroup	social-affairs-efiles-access		10/02/2016		Added from spreadsheet 05.02.2016, SNOW: RQF0543069. SNOW: RQF0550620.	10/02/2016	576653			Read	<input type="button" value="Disable"/>
Pension fund certificate	egroup	hr-legal-efiles-access		10/02/2016		Added on 29/09/2015 from Excel matrix completed by DAOs. SNOW: RQF0550620.	10/02/2016	576653			Read	<input type="button" value="Disable"/>
Pension fund certificate	egroup	hra-efiles-access		10/02/2016		Added on 29/09/2015 from Excel matrix completed by DAOs. SNOW: RQF0550620.	10/02/2016	576653			Read	<input type="button" value="Disable"/>
Pension fund certificate	egroup	hr-hra-assistant-efiles-access		10/02/2016		Added on 29/09/2015 from Excel matrix completed by DAOs. SNOW: RQF0550620.	10/02/2016	576653			Read	<input type="button" value="Disable"/>



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Customisations

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CERN Accelerating science

Efiles Admin Authorities **Access Rights** Document Definition

New Access Right

Search document access

By document definition By authority Show expired

Document Name user - ertupload

Start typing to get a list of possible matches Select one of the existing authorities

Name	Type	Value	Param	Start Date	End Date	Notes
Personal Information Sheet	user	ertupload		18/02/2016		Added as part of access right char ERT can continue to upload
Diploma	user	ertupload		18/02/2016		Added as part of access right char ERT can continue to upload
Report on Candidate	user	ertupload		18/02/2016		Added as part of access right char ERT can continue to upload
Reference letter	user	ertupload		18/02/2016		Added as part of access right char ERT can continue to upload
CV	user	ertupload		18/02/2016		Added as part of access right char ERT can continue to upload
Vacancy notice	user	ertupload		18/02/2016		Added as part of access right char ERT can continue to upload
Application form	user	ertupload		18/02/2016		Added as part of access right char ERT can continue to upload



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Next steps

Next steps

- Replace Share UI
- Further integration
- Case Management
- Disposition Schedules
- My Files
- Workflows

The screenshot shows the CERN eFiles interface. At the top, there's a navigation bar with the CERN logo and links for eFiles, Home, Upload, and Search. Below this is a file upload section with a placeholder "Drag and drop more files to upload" and a "Or browse files" button. A list of uploaded files named "filename.pdf" is shown, with the first one having a red warning icon. To the right, there are fields for "Person" (with a dropdown menu), "Document type" (set to "Advancement letter"), and "Document date" (set to "01/01/2016"). At the bottom, there are buttons for "Save document" (green), "Discard Changes" (grey), and "Delete document" (grey).

✓ All uploaded files are complete. Go to do...

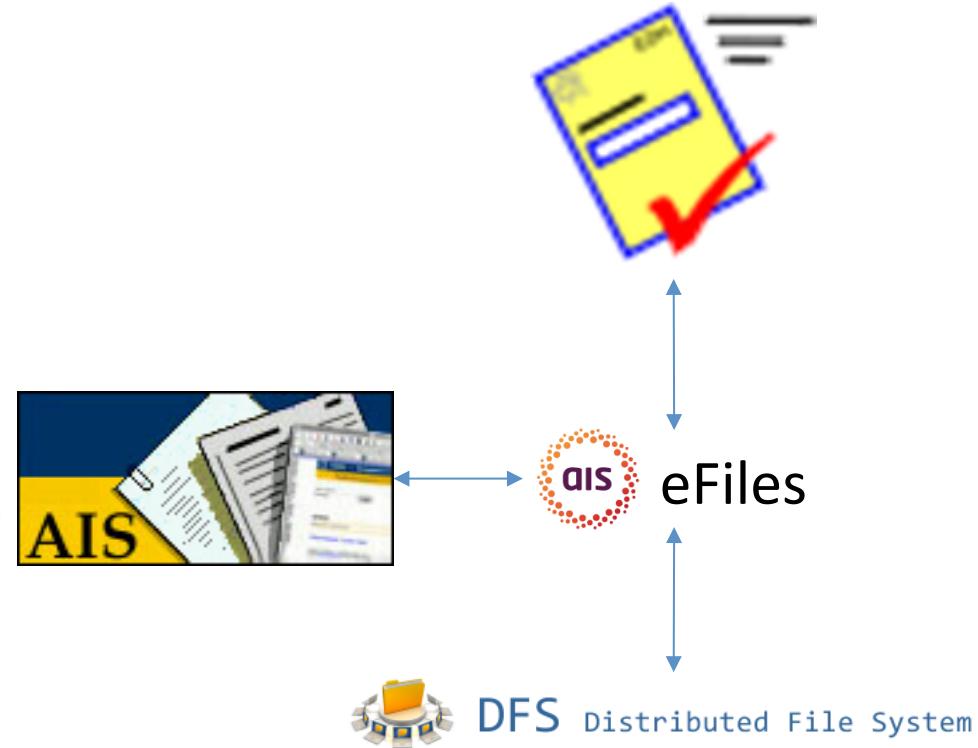


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Next steps

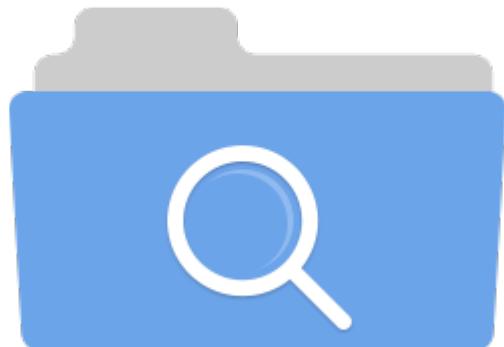
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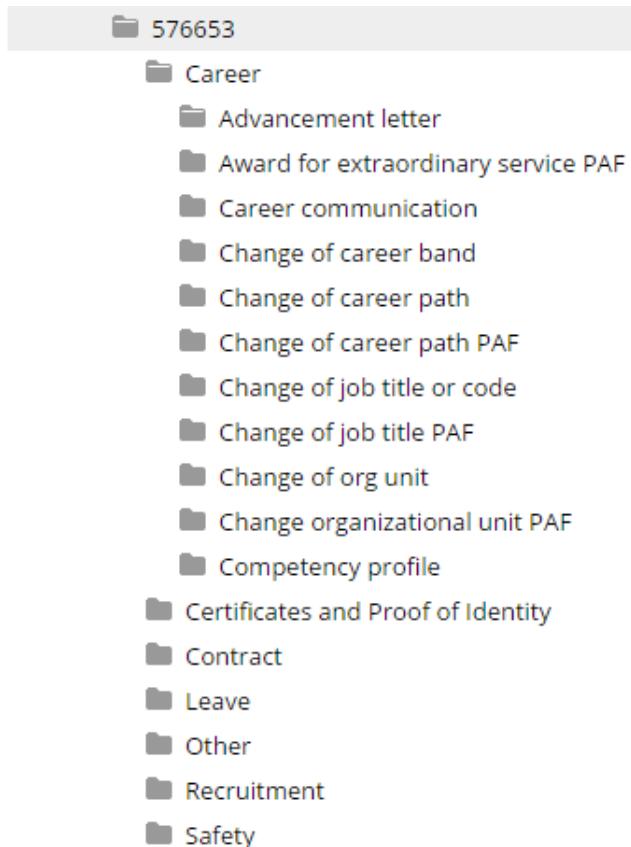


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Next steps

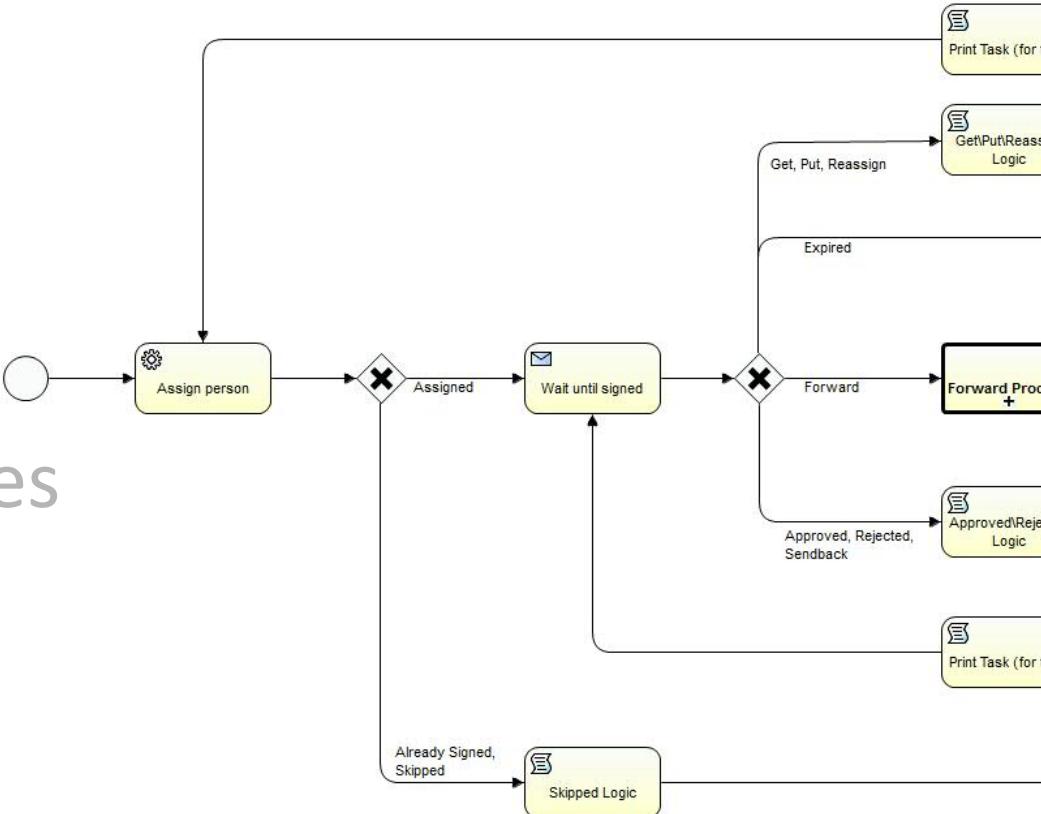
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Next steps

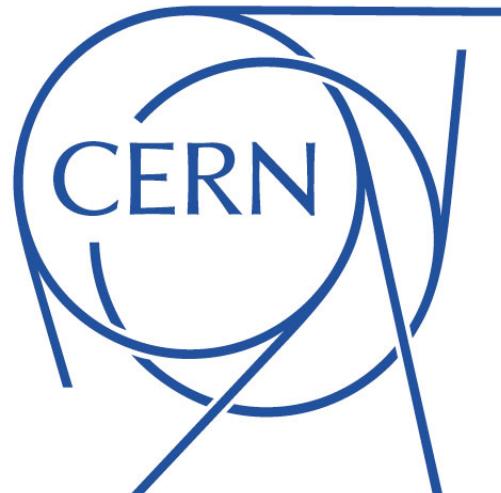
- Replace Share UI
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Thank You



Andrew Short

andrew.short@cern.ch

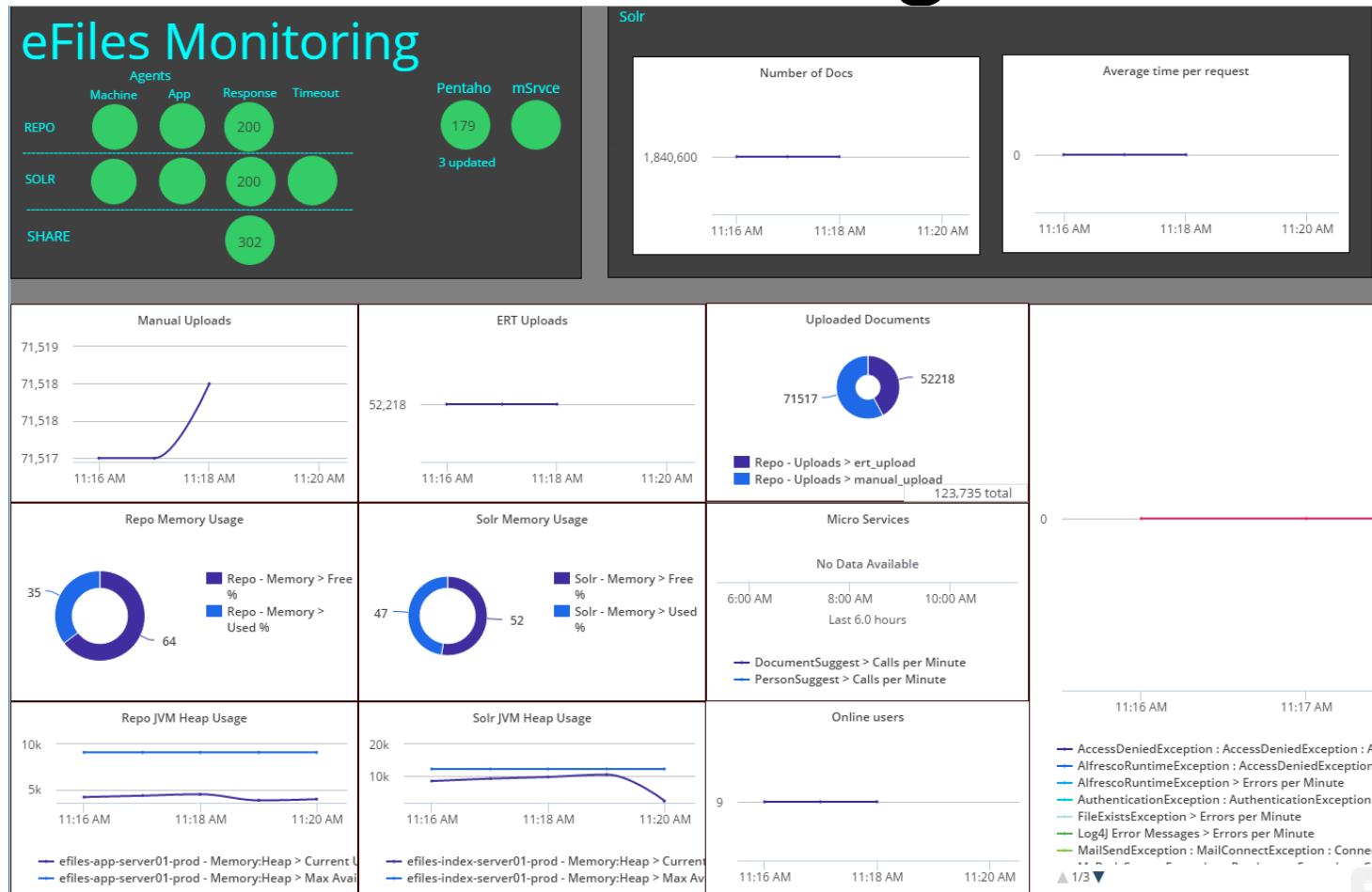


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Monitoring



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Admin Screens

CERN Accelerating science Signed in as: ASHORT [Sign out](#) [Directory](#)

Efiles Admin Authorities Access Rights Document Definition

Search document access [New Access Right](#)

By document definition **By authority** Show expired

Document Name: Start typing to get a list of possible matches Select one of the existing authorities

Name	Type	Value	Param	Start Date	End Date	Notes	Creation Date	Created By	Deletion Date	Deleted By	Permission	Actions
Personal Information Sheet	user	ertupload		18/02/2016		Added as part of access right changes so ERT can continue to upload	18/02/2016	754539			Read	Disable
Diploma	user	ertupload		18/02/2016		Added as part of access right changes so ERT can continue to upload	18/02/2016	754539			Read	Disable
Report on Candidate	user	ertupload		18/02/2016		Added as part of access right changes so ERT can continue to upload	18/02/2016	754539			Read	Disable
Reference letter	user	ertupload		18/02/2016		Added as part of access right changes so ERT can continue to upload	18/02/2016	754539			Read	Disable
CV	user	ertupload		18/02/2016		Added as part of access right changes so ERT can continue to upload	18/02/2016	754539			Read	Disable
Vacancy notice	user	ertupload		18/02/2016		Added as part of access right changes so ERT can continue to upload	18/02/2016	754539			Read	Disable
Application form	user	ertupload		18/02/2016		Added as part of access right changes so ERT can continue to upload	18/02/2016	754539			Read	Disable



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Electronic Document Handling

- Existing Electronic Document Handling tool (EDH)
- Documents to be injected to Alfresco automatically.
- Over 18,000 distinct users (2015)
- Over 70 document types
- Currently holds 6.4 million documents (April 2016)



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