Saving Documents from Microsoft Teams to HPE Content Manager

Introduction

Microsoft Teams is a collaboration tool and part of the enterprise suite of Microsoft 365. Microsoft Teams can be used for online meetings through Teams and Channels, chat, message, share documents and has the functionality to create a document to share within a Team/Channel eg Word, Excel, Power Point.

In accordance with the University Records Policy, records must be captured in HPE Content Manager (HPECM).

The ITDS Acceptable Use Procedure also reinforces this requirement
> *"All electronically held university data should be captured, stored and disposed of in accordance with the University Records Policy."*
> https://www.adelaide.edu.au/policies/2783/?dsn=policy.document;field=data;id=4703;m=view

Compliance with the University Records Policy and the ITDS Acceptable Use Procedure can be easily achieved by using the HPE Content Manager integration with Microsoft Office.

Note: The preferred method for saving documents is directly from Microsoft Office applications to HPECM - https://www.adelaide.edu.au/library/system/files/media/documents/2020-01/hpecm-register-word-excel-powerpoint.pdf

Note: Microsoft Office integration with HPE Content Manager ribbon will only be visible and available to HPECM licence holders.

To obtain a HPECM licence please contact Records Services – records.services@adelaide.edu.au
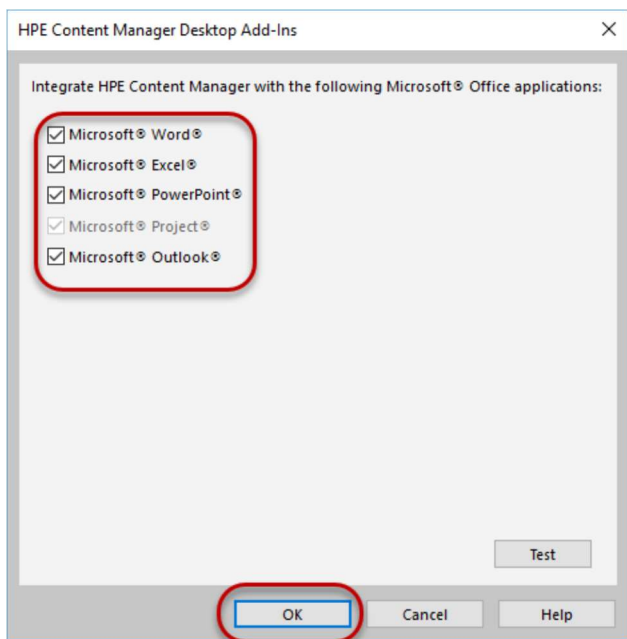
Procedure

Turn on Microsoft Integration with HPECM.

1. Ensure all Microsoft Office applications are closed.

2. In HPE Content Manager, go to **Tools** menu in the top left of screen, and select **Desktop Add-Ins**.
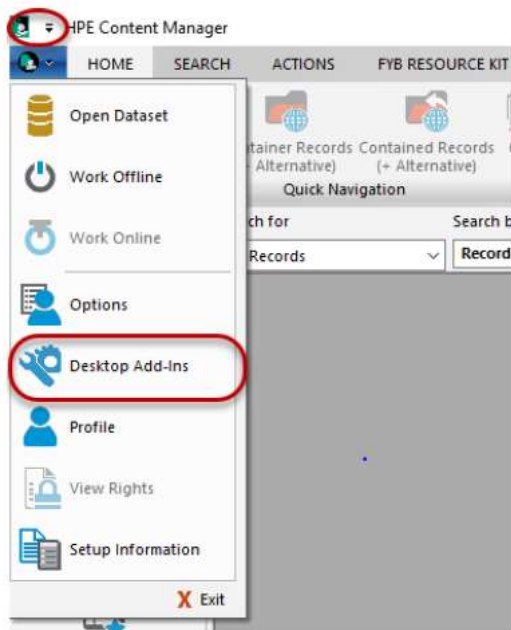
3. Check the boxes for **Word, Excel, PowerPoint and Outlook.**

4. Click **OK**.

Documents created within Microsoft Teams.

Teams has inbuilt functionality to create a new Word, Excel, Power Point document to share with members of the same Team or Channel. Once the document becomes more than a collaboration document it must be captured as university record in HPECM

Example:

If a document is first created with Teams for collaboration. Team members can update the document within the channel. When the document has been updated this is now a university record and needs to be captured from Microsoft Teams to HPECM.

A memorandum that requires additional background information from colleagues is created within Teams. Members of the team share and contribute to the memorandum and once at a stage for approval

and submission the document needs to be transferred from Microsoft Teams to HPECM. HPECM provides a document number and the document can be submitted for approval.

## Creating new documents in Microsoft Teams.

A new document will be created in Teams by using the **New** button within a Team or Channel.
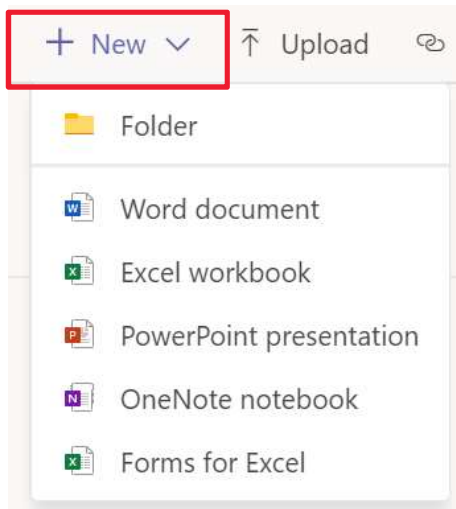
The document may be edited and shared within teams as a collaboration document.

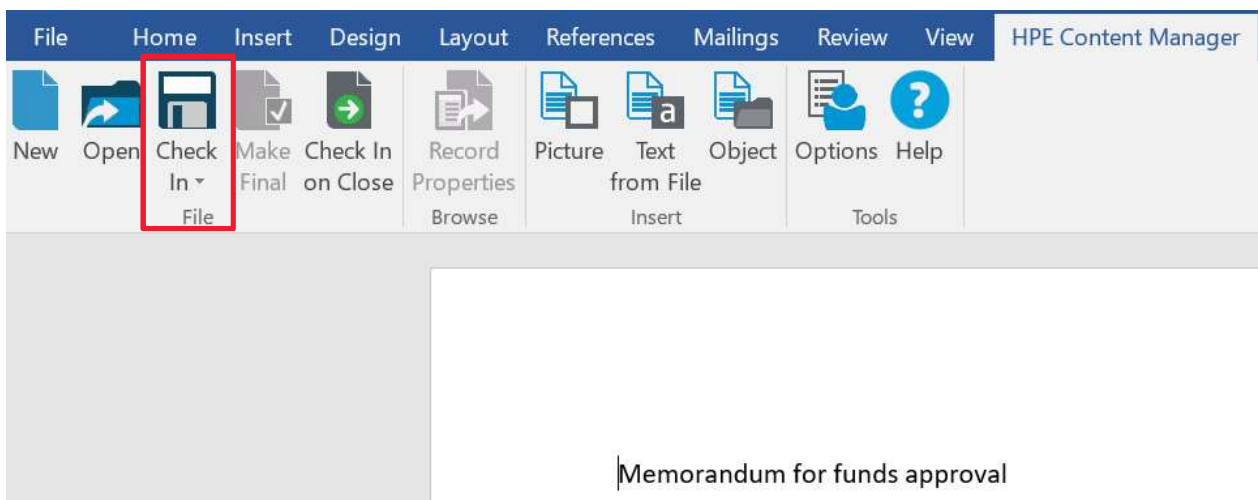## Creating new documents in HPECM from Microsoft Teams.

1. Select the document Word/ Excel / Power Point from within the Team or Channel and select **'Open in Desktop App'**.
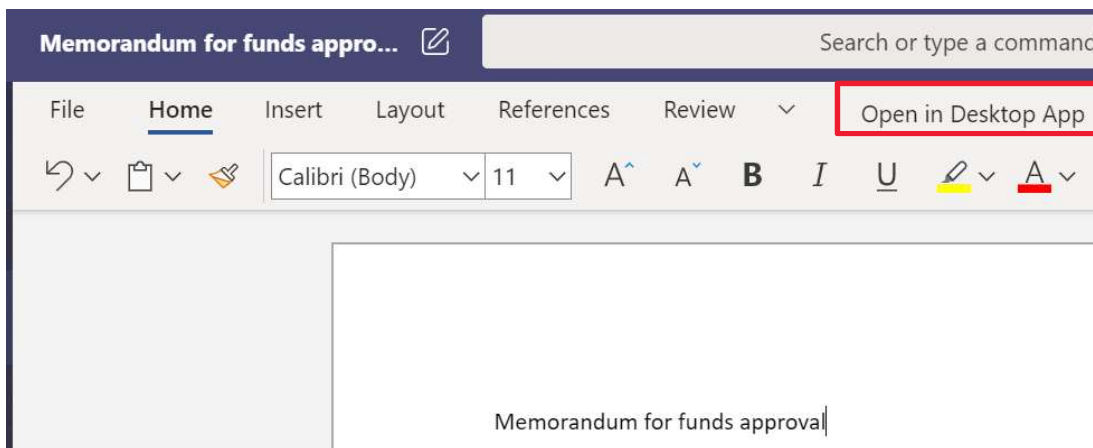
2. The desktop version of the office application will launch eg Microsoft Word.

3. Select **HPE Content Manager** on the ribbon.

Memorandum for funds approval

4. Select **Check In.**

Memorandum for funds approval
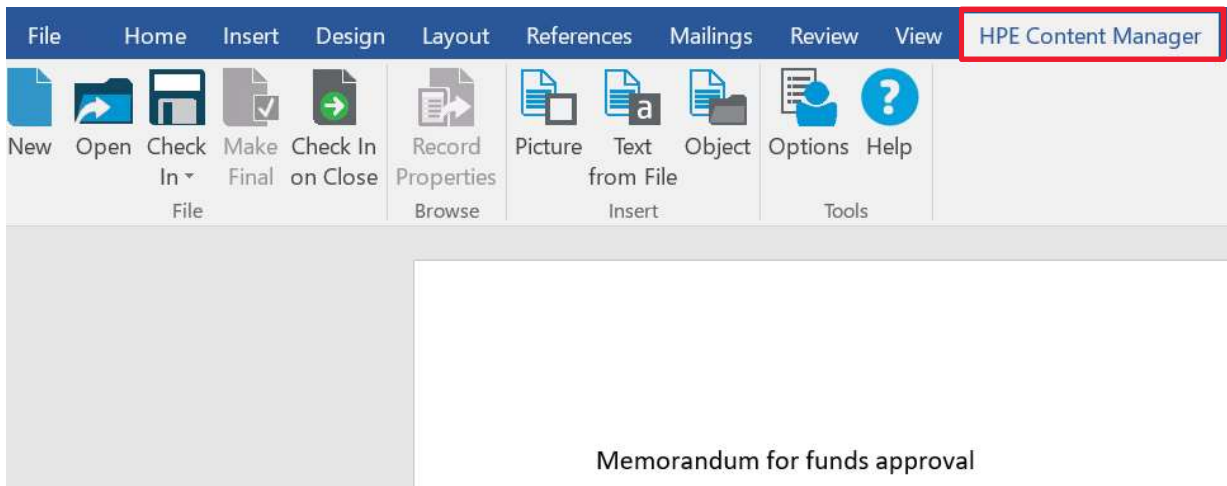
5. A **Document Registration** form will display. Complete the document registration fields, document title, file number, author, addressee and other required details, mandatory fields*.

6. Click **OK.**

The document created or edited in Microsoft Teams will now be saved as a record in HPECM. The document will be provided with a document number eg D2020/XXXXX. The document in Microsoft Teams can be treated as a copy.