Athabasca University Improves Document and Records Management with the Help of Zia Consulting

1 Background

As Canada's leading open university, Athabasca University (AU) offers over 700 online, at a distance, and in-classroom courses. With over 38,000 students and 1,200 faculty and staff members, managing the course content is no easy task.

AU technology infrastructure is built on Moodle, an open source platform, as its Learning Management System (LMS) or online learning environment. While Moodle successfully handles course content, assignments, and class interaction it does not address the complete lifecycle of content from creation to editing to storing. In 2007, AU implemented Alfresco Enterprise to help store and manage course content. The university quickly saw the benefits of Alfresco but realized they were not utilizing all of its robust functionality. By 2009, AU wanted to expand its use of Alfresco to include managed workflows for course content, records management and digitizing/storing all classroom courses.

To accomplish this, AU needed help migrating to the latest release of Alfresco, designing a taxonomy structure, building workflows, and setting up the Alfresco system to meet the university's current and future needs around document and record management.

2 Solution

After speaking with Alfresco representatives at a Los Angeles Alfresco meet-up AU was introduced to Zia Consulting, a Platinum Partner. Zia recommended conducting a detailed roadmap assessment on the university's technology infrastructure, business objectives, workflow requirements, and record management needs. Over a period of six weeks, Zia consultants met with various AU groups to understand current business processes, outline workflow models, and assess the university's taxonomy structure for classifying documents.

The resulting assessment broke down AU's needs into three projects: upgrading and setting up Alfresco 3.3, designing a records management strategy, and building workflows. Key to the assessment was helping AU understand how Alfresco tied back to established processes.

"Zia Consulting has delivered consistent results for our customers and has a deep knowledge in the space. Athabasca University is an excellent example of how customers are expanding their use of Alfresco from a document management system to include advanced workflows and records management."

- Martin Musierowicz, VP Sales Americas - Alfresco

Zia worked with the technical team to set up a strong foundation for the Alfresco upgrade. Zia developed the architecture, conducted code reviews, and determined the repository requirements. Zia also ensured that the new Alfresco environment would integrate with Moodle and allow for seamless workflows.
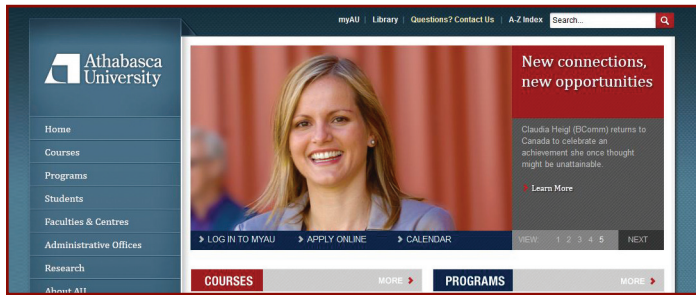
Zia implemented a folder and taxonomy structure within Alfresco to serve as the records management foundation for AU. This ensures that records management policies are being applied to course materials. Quality control reporting is also included to help AU staff see when documents are added to or moved within the Alfresco respository. Zia also prepared AU to migrate material for over 700 courses to the Alfresco repository, which allows the university to implement Alfresco's record management module over the next few years and set retention policies and governance around any content.

In an effort to deliver results that the university could take advantage of quickly, Zia worked with the IT team to develop and test a Minor Corrections workflow for the Center for Learning Design and Development (CLDD), which is involved in course development and revisions. This workflow is frequently used and establishes an online approval process to make corrections to active course materials. Through the testing process, the team was able to refine the workflow to meet both the CLDD and course creator's expectations. The new workflow also provides an audit trail allowing the university to better manage its processes.

AU's IT team shadowed Zia consultants on the development and testing of the workflow. This partnership allowed the IT team to learn firsthand how to develop effective workflows and roll them out. AU is now able to create additional workflows on its own.

3 Conclusion

From the beginning it was clear to AU that Zia consultants were extremely knowledgeable in enterprise content management, understood complex workflows, and would be able to deliver strong results. Zia's agile development approach matched well with AU's own philosophy.

AU found Zia Consulting to be extremely flexible and open to knowledge sharing. This has allowed the University IT team to become more proficient in Alfresco development without having to hire additional staff. The AU team can now successfully maintain Alfresco and implement the remaining workflows and records management module.

AU is now able to take advantage of all the functionality within Alfresco and leverage it across the entire university as a central repository for creating, editing, and managing content. Documents are now easily managed throughout their lifecycle and seamlessly integrated with the university's LMS. The new document and records management system is used by over 1,000 users and is highly scalable to easily handle current and future needs.

"Zia Consulting was instrumental in helping us define how to best leverage Alfresco to meet our document and records management needs. Zia was extremely open to sharing their expertise with our technology team so that we can continue developing our own Alfresco workflows and content processes. We look forward to working with Zia Consulting on future projects and we highly recomend them.

- Karen Stauffer, Programmer Analyst - Athabasca University