

SharePoint and Nintex deliver substantial business benefits and a better way of working for Places for People

The multiple and diverse businesses of Places for People now have a flexible and user-friendly platform based on Microsoft SharePoint, to manage corporate information, collaborate securely, and build line-of-business solutions upon.

Places for People Group is a highly diverse and growing organisation, operating across a variety of markets including property management, development, regeneration, leisure, and Capital. The Group's businesses own or manage over 180,000 properties and have assets of over £3.1b.



The challenge

The demands on its IT systems are significant and reflect the scale and diversity of its operations. It became apparent that their existing EDRM system could no longer meet their business requirements, being considered too inflexible and therefore suffering from poor adoption as a result. The EDRM system had been in operation since 2006, and had amassed a total of 3.5TB of data comprising 9 million documents. The quality of metadata was in many cases poor, and information management policies (retention & disposal rules) had not been enforced by the system. The system was also integrated with the Northgate housing management system, and held over 4m business records (documents) relating to property and tenancy management. Migrating that content from the existing EDRM system was not going to be straightforward, because there was no bulk export function available, and all of the file properties and metadata are stripped out and held in an Oracle database. To the Places for People IT department, the system was effectively impenetrable, and there was no means to access support from the vendor.

Places for People went to the market to identify an Enterprise Content Management platform in late 2014 with the following headline objectives:

- The search facility must be Google-like. A facility that searches intelligently for keywords in document contents and metadata
- The user experience must be intuitive and easy to use
- The system must support a substantial mobile workforce with diverse responsibilities
- The system must provide features to deliver document lifecycle management, administration and reporting
- The metadata structure must be flexible and intelligent

- The system must be flexible enough to enable applications integration and workflow
- The system must provide a secure collaboration platform in order to collate and manage content within both internal and intra-organisational teams and projects.

The solution

After an extensive review and OJEU tendering process of commercially available solutions, Microsoft SharePoint was selected, with Deltascheme as the implementation and support partner. Deltascheme also introduced Nintex, the market leading workflow, forms engine and mobile solution for SharePoint, Sharegate to aid with content migration into SharePoint, Swift Outlook Email Manager to provide integration between Outlook and SharePoint, and OneDrive as a replacement for personal file stores.

The services to implement SharePoint as an ECM Platform consisted of several connected workstreams, which drew on the diverse skillsets of the Deltascheme team. An information architecture and governance stream established the SharePoint structure and metadata standards. Working within the SharePoint limits required the expertise of Deltascheme's developers to implement site-spreading so that Places for People could store their housing management records in SharePoint. This process meant that a single solution within SharePoint was able to accommodate over 200,000 document sets and over 2.5 million documents, without impairing performance. Housing management files were also made directly accessible from the Northgate housing system, via the development of an integration link between SharePoint and Northgate.

One of the most significant challenges of this project was the migration of large volumes of content from the existing EDRM system and into SharePoint. Deltascheme developers built a custom migration tool which interrogated the Oracle database, extracted the content, applied various mapping rules defined for that content, and loaded the content into the correct property management document set in SharePoint. A reconciliation report captured the full audit trail of all document movements. The process of migration supported a data cleansing exercise and allowed the implementation of retention and disposition rules relating to the type of content. For example, a document tagged as relating to asbestos would be given an indefinite retention period whereas a gas safety certificate which expires after one year may only be retained for seven years.

“Deltascheme has proven entirely consistent in the approach, capability, conscientiousness and productivity of its respective technical specialists and professional services consultants. They have delivered a comprehensive solution set on budget and according to the original specification and proposal. The quality and responsiveness of their support team is particularly good. The commercial, contractual and account management experience has been transparent, ethical and painless throughout. Deltascheme has become a key strategic technology partner to the Group.”

For end-users, a major frustration with the existing EDRM system was the lack of features to support collaboration. That changed with the development and introduction of a SharePoint and Nintex based solution. Places for People now operates a series of project registers across SharePoint, each concerning different business operating functions (e.g. Construction, IT, Corporate Projects, and Compliance programmes). In each case, template project collaboration sites have been developed and customised to fulfil the requirements of those respective activities. In addition to document libraries, those sites might also provide additional features including draft project plans, risk registers, and discussion boards. Users can produce dedicated collaboration sites on demand, and specify which internal and external individuals are granted access, and in what capacity (owner, member, visitor).

The introduction of Extradium has allowed Places for People to extend secure SharePoint access to those project sites for third parties. Owners of project areas are also in control of the lifecycle of their site(s), and can initiate a process to archive the contents at the close of each project. Not only does the solution enable and encourage collaboration, but it does so

in a manner which doesn't require any administrative privileges or knowledge on the part of end-users, and therefore ensures that SharePoint remains controlled and structured within an effective governance and administrative framework.

Benefits

By implementing SharePoint and Nintex as a corporate platform, Places for People has delivered against key objectives, and the solution set will continue to provide greater value as more features and solutions are introduced. Some of the immediate benefits have been:

- A massive improvement in the ability to search for content.
- Users of the Northgate housing system can now directly access the housing management files from within Northgate, saving significant time.
- Users of Outlook can use Swift Outlook Email Manager to search for a location in SharePoint (within Outlook) and directly transfer content into the correct area (whilst enforcing the relevant information governance standards). Users can also view SharePoint content within Outlook - again saving time and ensuring documents are correctly filed.
- The excessive support costs and risks associated with operating a niche system have been addressed.
- Collaboration with third party organisations has greatly improved.
- Information governance is greatly improved and certain content now subject to automated disposal processes.
- The replacement of personal local drives with OneDrive has reduced storage from 3TB to 380GB, and from 3.9 million documents to 540,000 documents - a reduction of 86%. The introduction of OneDrive has also enabled sharing of content between colleagues, and has allowed for the introduction of workflow to enable a review and subsequent disposal for the personal document libraries of leavers. That initiative has significantly addressed the risk of losing business critical information, and significantly reduced the unnecessary duplication of electronic content.

Aside from the immediate benefits as an EDRMS and collaborative environment, SharePoint and Nintex has provided an excellent platform for the development of both small and more significant line-of-business solutions including: multiple departmental workflows, case management systems, and a group-wide comprehensive health and safety system (the subject of a separate case study).