

Canal & River Trust

The Canal & River Trust is a Charity that cares for the 2,200 mile network of canals and rivers in England and Wales. Its purpose is to protect the historic waterways in its care, secure and earn the necessary funding, and optimise public benefit.

The Canal & River Trust is the third largest estate of listed structures in the country, totalling 2,600. This is in addition to the 350 miles of conservation areas along waterways and more than 90 reservoirs.

Deltascheme have worked with Canal and River Trust on their SharePoint system when they first recognised the need for a corporate electronic document and records management system (EDRMS) in 2007 and chose Microsoft SharePoint. The system has now been adopted by almost all the departments at Canal and River Trust and is an excellent example of how a well-executed SharePoint system can bring substantial business benefits. Here are some of the business problems we have provided SharePoint solutions for:



Canal &
River Trust

Cumbersome and inefficient processes around paper content

The Problem

An office move in 2007 triggered the need to move away from paper which had all the normal problems associated with hard copy, especially in an organisation with multiple sites needing access to the same information and now also needing to reduce its office costs.

The Solution

Deltascheme implemented a SharePoint and Kofax scanning solution using Fujitsu scanners capable of processing over 8000 documents a day. The first stage was to deal with the 640,000 images held in 50 or so large filing cabinets in the head office. The resulting OCR'd PDF images required just 250GB of storage. From here the scanning capability was rolled out to 11 other sites and there are now well over 2.2 million images on the system.

The solution didn't stop with scanning however, as content from email and network file shares (including images) also needed to be loaded into SharePoint, as well as information from the ERP system (SAP). To support this activity we provided a number of SharePoint enhancements including an integration with SAP, an integration with Outlook (Swift Outlook Email Manger), and a multi-file upload tool run from a SharePoint document library which allows a common set of metadata to be applied to all the uploaded files.



Benefits

- Management decision-making greatly improved by reliable access to information.
- Improved search efficiency and accuracy from what is now a shared document repository.
- Significant savings on storage costs, i.e. office space and retrieval costs from off-site stores.

Physical Records Management

The Problem

A legacy HP TRIM physical records management system had reached end of life being expensive to maintain and inflexible.

The Solution

Deltascheme developed a SharePoint records management solution to replace the HP TRIM functionality and migrated the content from HP TRIM to SharePoint, in total nearly 200,000 records.

Benefits

- Immediate cost savings. The implementation cost was actually less than the maintenance cost of retaining the HP TRIM system.
- Improved functionality including a self-service capability and greater visibility of physical items in the system.
- SharePoint retention and disposition functionality now available on physical items.

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Deltascheme have delighted us with their excellent service, expertise and helpfulness throughout our document management project. Their ideas have been practical and business focused. The project's success can be measured by the congratulations from our executive and eagerness of our people to use the solution.”

Keith Lester, Audit Manager, Canal & River Trust



Business Processes - Nintex

The Problem

Each year the Trust's line managers are tasked with rating the performance of the organisation's 1,600 staff. The performance of each staff member is ranked by their line manager and their future salary reported in a letter along with the review results. In the past, the entire process was manual, requiring the HR department to gather performance reviews from line managers and to then author individual letters to each member of staff which may contain annual raises, performance related bonuses and, or, benefit based on their job, and other factors.

As with all manual processes it was very time consuming, prone to human error and reliant on HR staff to gather information from line managers.

The Solution

Deltascheme developed a Nintex workflow that automated a large part of the Professional Development Review process. This included implementing the following:-

- Maintain a synchronised list of employee details in SharePoint from the SAP master.

- Create a 'Rating' record for each member of staff.
- Set the permissions on the rating record so just the relevant line manager can access it.
- Inform line managers they have staff to rate - and chase / escalate if they don't!
- For each completed rating generate the appropriate staff letters.
- Invite line managers to distribute the letters to their staff.
- Export the rating data back to SAP which holds the master record for a user.

Technically the solution consists of an Interface with SAP, multiple Nintex workflows that support one another, and a number of user defined actions configured in Nintex to allow the workflows to query the data.

Benefits

- Significantly reduced the administrative burden in terms of creating user accounts and processing course enrolments leading to reduced costs, improved business productivity and improved customer service.

- The exposure (and resolution) of possible liabilities associated with staff not completing their necessary training.

The feedback from the different areas of the organisation to Nintex has been extremely positive and a decision has now been made to invest further in the roll-out of Nintex to assist with other business processes including:-

- Disciplinary process
- Training course bookings
- Sickness and self-certification
- Holiday requests.

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We selected Nintex for its close integration with SharePoint and friendly interface. The business is delighted with the results having quickly realised significant efficiencies, data quality improvements and positive comments from users of the workflow solutions. Deltascheme ensured we succeeded using their expertise in designing and building the Nintex workflows.”

Keith Lester, Audit Manager, Canal & River Trust

About Deltascheme

Deltascheme is a leading provider of business and technical consultancy for Electronic Content Management and Business Process Management solutions based on Microsoft technologies.

Established in 1986, Deltascheme have consistently delivered best-of-breed technologies and proven solutions in answer to the growing business needs of their customers. To find out more about Deltascheme go online to:

www.deltascheme.com.