Winchester City Council

Employing 450 staff, the Council is responsible for the provision of local government services to approximately 118,000 residents in and around the City of Winchester which covers an area of approximately 250 square miles. Winchester is a designated heritage city and has an estimated 5.6 million visitors each year.

Corporate Intranet and Document and Records Management System

The Problem

In 2014 the Council became aware that their existing Electronic Records Management System was being discontinued and would therefore need to be replaced. In addition, the Council needed to replace their Intranet and, to reduce operating costs, wanted to move away from the use of network file shares.

Having reviewed a number of options the Council decided to adopt Microsoft SharePoint as the replacement corporate Electronic Document & Records Management System (EDRMS) due to its cost, user friendly interface, compliance with corporate standards and flexibility to deliver a range of business requirements. The Council then ran a procurement process and Deltascheme was selected to be their Microsoft Gold Certified SharePoint Implementation Partner.

"We selected Deltascheme due to their proven experience in Local Government, in-depth expertise in delivering EDRM systems in SharePoint, competitive costs, flexible implementation approach and their ability to provide us with a complete solution using a number of 'plug-in' products for SharePoint."

The Solution

Deltascheme then worked with the Council to support the implementation of Microsoft SharePoint as the corporate EDRM system through the provision of a range of specialist business and technical services including offering advice and guidance around:

- Project planning and recommended methodology
- Defining and configuring a suitable corporate Information Architecture
- Industry best practice and the 'SharePoint way' of delivering requirements
- Document & records management.

In adopting this approach the Council were able to undertake much of the configuration in-house using their own personnel. The 'pioneer' areas of the implementation were Housing Services, HR and Corporate Projects.

Estate Services, Legal Services, the Health & Wellbeing team, Sport & Physical Activity, Street Care & Maintenance and the Customer Services Centre have subsequently adopted the system and it is currently being implemented in Environmental Health Protection and the remaining parts of the Council, including Economies & Communities and for Subject Matter Access and Freedom of Information requests. A Council-wide Intranet has also been delivered as part of the project using Microsoft SharePoint.

As the system is being rolled out the Council is removing the ability for users to store content on the corporate network file shares.

In addition, Deltascheme was tasked with taking ownership of the delivery of a number of components of the project specifically; the import of the content from the existing Electronic Records Management System into SharePoint and the provision of an integrated scanning solution for the Council.

Content Migration

To migrate the historic content into SharePoint, Deltascheme wrote a number of scripts to automatically upload each record to the correct location in SharePoint using its existing metadata. The migration process included the preservation of key data such as the 'author' and 'creation date', etc. which is required for legal admissibility and subsequent viewing of content based on chronology. Using pre-defined rules, the migration scripts also included exception handling processes and the disposal of content which was no longer required based, for example, on its 'type' and 'age'. Approximately 600,000 records were successfully migrated.

"Deltascheme played a significant role in the successful migration of the content from our existing EDRM system and I firmly believe that without their tools and expertise this process would have been a very much more expensive and lengthy process for us."

Document Scanning and Digital Post Room

A key requirement of the project was the digitisation of existing paper records to reduce physical storage requirements and to create a single point of reference for users to content. Deltascheme implemented the Kofax Capture product to provide an efficient and scalable solution for the scanning and indexing of the records directly into SharePoint.

In addition, Kofax was used to enable post to be scanned and electronically distributed, through SharePoint, for processing by the relevant teams within the Council. Deltascheme's Property Editor tool is used to enable users to be able to quickly and easily view and index each piece of post within SharePoint.

A Nintex Workflow is then used to move the records to their correct location in SharePoint for long term storage and archive. Nintex is also used for automatically applying non-standard permissions to content based on its type (e.g. for HR and for Housing).

Summary of Benefits

A brief summary of the key benefits of the solution are as follows:

- Reduced requirements for physical storage of paper records
- Reduced operating costs by replacing the existing EDRM system and network file shares
- Better governance, avoiding content duplication and managing users access to content
- Improved accessibility to content thought the provision of a single repository
- Delivery of a new corporate Intranet for communications and compliance to procedures
- Improved quality of service provided through quick and easy access to records.

> *Working with Deltascheme has been very enjoyable. We have benefited greatly from their extensive expertise which they have successfully imparted to us to enable us to take ownership of the deployment of SharePoint in-house as our corporate Electronic Document & Records Management System. We have also appreciated their flexible approach to the project and their commitment to build a longer term relationship with us through the provision of a high standard of on-going support.*

Chris Roberts, Project Manager, Winchester City Council

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.