

West Dorset District Council and Weymouth & Portland Borough Council

West Dorset District Council and Weymouth & Portland Borough Council are the local government authorities responsible for providing services to the 500,000 people in the Dorset area.

Microsoft SharePoint Document & Records Management System to support a Shared Service Partnership

The Problem

To help drive down operating costs and improve standards of service, West Dorset District Council and Weymouth & Portland Borough Council decided to enter into a Shared Service Partnership which has involved the merging and migration of offices, systems, services and processes.

To support the implementation of the new Partnership the Councils recognised the need to implement a new corporate Enterprise Document & Records Management System (including the Intranet) to support changes in working practises (hot-desking, remote working, etc.), reduced office space and the need for a corporate Records Management System. The Councils also required a well-executed migration strategy to move content from their existing OpenText Valid archive records management system to a new platform.

As the existing systems were deemed not to be suitable to effectively support the new Partnership, the Council, after some investigations, decided to adopt Microsoft SharePoint as the corporate intranet and EDRMS with Kofax Capture providing a comprehensive and integrated solution for document scanning.

The Solution

After a tendering process, the Council selected Deltascheme to be their Microsoft SharePoint, migration and Kofax Implementation Partner. The initial phase of the project was to design and implement a corporate information architecture which would then be rolled-out across the different functions of the Councils starting with Human Resources.

The solution is now being rolled-out across many other business functions within the Councils and content currently held in their Valid R/KYV Records Management System, is being migrated into SharePoint. The intention is that SharePoint will replace much of the physical filing of paper records and the Councils network file stores.



The Council also recognised the benefit of deploying a range of Deltascheme Swift products for SharePoint:-

- Swift Outlook Email Manager for SharePoint was selected to allow users to capture email and document attachments and save them to SharePoint.
- Swift Property Editor was selected to allow metadata to be quickly added to multiple documents.
- Swift Site Creator was selected to allow users to simply create multiple sites such as project workspaces for the IT team, etc.

Deploying these tools at the start of a project has helped user acceptance and reduce adoption time.

Part of the project also involved implementing Kofax Capture to provide a corporate solution for the scanning, indexing and storing of paper records into SharePoint across the different business functions. Where possible, interfaces have been set-up with Kofax to existing data sources to automate and validate the indexing of the documents (e.g. with HR for employee details) thus ensuring the accurate and timely capture of historical records into SharePoint.

The Council is now considering extending the use of SharePoint to deliver a range of applications such as Request for Information Handling and Committee Management.

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Benefits

- A corporate environment for managing document & records
- Reducing the need for physical storage
- Enabling changes in working practices (e.g. remote working, etc.)
- Helping consolidate existing systems onto a single technology platform (Intranet, Valid R/KYV, etc.)
- Supporting better governance, compliance and legal admissibility
- Providing a common platform for delivering other solutions and applications.

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Microsoft SharePoint was chosen as the corporate Document & Records Management System as it offered the functionality we required and was very cost effective to deploy and own compared to other products we considered.

We selected Deltascheme as our implementation partner as they were widely recognised as leaders in the field of deploying SharePoint EDRMS and were able to offer us a complete solution including integrated email management and scanning.

There has been a real sense of partnership working with Deltascheme who have always been very professional, approachable and willing to help.

We look forward to working with Deltascheme as we continue to roll-out and extend the use of SharePoint across the Council.”

Mark Chivers

Information Technology Manager, West Dorset District 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.