

Case Study: Bracknell Forest Council

Bracknell Forest Council is a local unitary authority in the UK serving 123,000 residents. It is responsible for all local government functions within the area, including housing, welfare and benefits, as well as social services, which include a large portion of sensitive information. The council also partners with the NHS and other agencies to share this data, so it must be properly protected.



The Situation

Bracknell Forest Council wanted to move its systems to the Cloud as part of its Digital and ICT Strategy. A key building block for this strategy was to upgrade to the Microsoft 365 (Cloud-hosted) suite of applications. Having successfully upgraded to Exchange Online, OneDrive and Teams, efforts were then focussed on projects to optimise its use of SharePoint, which comes with the M365 platform.

Bracknell Forest Council was looking for one efficient, secure and cost-effective electronic document and records management system (EDRMS). The M365 project team reviewed the various departmental systems that were providing document management and produced a proposal to develop a council-wide EDRMS using SharePoint.

The benefits of this approach were:

- To produce a corporate file plan based on the local government classification scheme (LGCS)
- To rationalise the number of legacy systems providing document management tasks and therefore, reducing the costs of support and maintenance by de-commissioning these (after documents were successfully migrated to the SharePoint EDRMS)
- To utilise the EDRMS to make it easier to provide the records retention register in line with the updated data protection regulation, GDPR
- To review document storage requirements going forward and not to retain data and records for longer than necessary

Choosing a Partner

As with all public sector contracts, Bracknell Forest Council had to follow stringent and transparent procurement guidelines.

Bracknell Forest Council needed a partner with knowledge of the Local Government Classification Scheme (LGCS) and had produced an EDRMS with a local authority.

It further had a requirement for an email integration solution with SharePoint.

Ken Connolly, Lead ICT Project Manager, said of the search: “It was widely believed you couldn’t implement a large corporate document management system by using SharePoint alone, and that we would need to purchase additional software.

“It became evident that working with Automated Intelligence, we would be able to use SharePoint as an EDRMS without adding bolt-ons and this interested us greatly.”

Working with Automated Intelligence

Bracknell Forest produced its council-wide file plan based on the classification scheme which was supplied to Automated Intelligence as the basis of the project. The file plan was necessary to develop the structure of the EDRMS.

Over the course of the project:

- Bracknell Forest Council worked with Automated Intelligence to come up with data migration rules using AI’s user-friendly data mapping tool
- Retention rules were applied to data being migrated to SharePoint
- Data was migrated to the EDRMS using Automated Intelligence’s **AI.DATALIFT** solution
- The council adopted Automated Intelligence’s Outlook/SharePoint integration tool, **AI.SYNCPPOINT**
- Microsoft Teams was employed for collaboration working (completed a matter of weeks before the first COVID-19 lockdown and therefore became an extremely important part of the council’s remote working)

Outcomes

Andy Trotter, ICT Project Manager, said, “If you break the word SharePoint down, share rather than send is the message that we use now. People are finding it easier to share documents and to collaborate at the same time, on the same document.

“Of course, there was initially some resistance to change, but staff have really taken to it. It’s new, it’s a bold move, but I have no doubt that all councils will have SharePoint within five years.”

Andy added that he knows the council has been progressive in this project: “I talk to other councils and they say, “How on earth have you done it?”

“How on earth have you got your data into a SharePoint solution with a file plan that everyone agrees to.

“That’s exactly what we want to do; you have shown us what we are trying to achieve but just couldn’t visualise it.”

Ken Connolly concluded: “It is a high-profile system in Bracknell and it has helped in the council’s response to COVID-19 by creating a central secure document storage, making it easy to collaborate with internal colleagues and external partners.

“The project has even been referred to in Chief Executive briefings. This has all been done using SharePoint ‘out of the box’ without the need for additional partners - we have truly optimised our SharePoint system.”

Results of the project include:

- Decommission of legacy document management systems, leading to savings on software support and maintenance
- Migration of over five million documents to SharePoint Online
- Remediation of all DROT (Duplicate, Redundant, Obsolete and Trivial) data, improving the quality of the data held and reducing storage costs
- Information lifecycle now managed through a mature retention policy
- A GDPR-compliant EDRMS

Want to find out more?

Visit the Automated Intelligence website for further information on employing SharePoint as an EDRMS: <https://www.automated-intelligence.com/>