

## \* Case Study

# Specialist Schools and Academies Trust

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## Oyster IMS implement Active Navigation and SharePoint as a Document Management solution for SSAT

### The company

The Specialist Schools & Academies Trust (SSAT) is an independent, not-for-profit membership organisation dedicated to raising levels of achievement in secondary education. They have a membership of over 4,900 schools and are a registered charity.

The SSAT employs more than 400 staff, is head quartered in London and has a number of regional offices across England, as well as a growing international presence.

### The background

The SSAT had identified a requirement to implement an enterprise wide Document Management solution in order to address a number of deficiencies around the management of their electronic unstructured data.

An unregulated, sprawling network file share had evolved over the years. Containing nearly a million documents and occupying 665Gb, the main shared drive was known to contain large volumes of out-of-date and redundant documents. Moreover, the multi-level folder structures, inconsistent file naming conventions and general lack of metadata associated with this content were presenting the SSAT with a number of challenges, including:

- Increased storage and backup costs
- Time wasted searching for documents
- Duplication of work as original documents cannot be found
- Inability of internal and external users to share documents and collaborate effectively
- Proliferation of content on hard drives as users “opt out” of using the shared network drives

Oyster IMS were engaged to assist the SSAT in analysing and cleansing their existing content and to pave the way for the implementation of a Document Management system.

### The solution

The SSAT selected Microsoft Office SharePoint 2007 as their Document Management solution, building on the deployment of this technology for the development of their

website and e-portal. Active Navigation was selected as the product of choice to analyse the existing content and to execute the following key processes:

- **Identify exact duplicates** - The most common instance is where the same file has been stored in multiple locations, most often by different users. Files which contain the exact same content but have been given different names are identified. Based on a set of configurable rules the exact duplicates would be removed.
- **Identify near duplicates** - This is where a number of files are extremely similar; most of the content is identical. This might occur where users have used a document as a base template to create many similar files. In this case, user interaction would be required to determine which files should be kept or removed.
- **Perform thematic analysis** - Themes common to the set of data would be identified and document summaries created. These would be used to enhance the search and retrieval of documents when in SharePoint.
- **Taxonomy creation** - Based on the document summary and thematic extraction, this process helps users to create a meaningful taxonomy for their content. The resulting taxonomy would be used to inform the design and structure of the SharePoint document libraries.
- **SharePoint migration** - Based on a set of metadata extraction rules the documents would be migrated into the appropriate SharePoint document libraries.

Running alongside the Active Navigation processes Oyster IMS has been working to ensure that SharePoint is setup and configured appropriately for Document Management. We created a scoping matrix which splintered the business requirements into individual items to be reviewed against SharePoint's capabilities. We then assisted the SSAT in creating a 'site map' for the solution which included the document library designs, content type design and the security model.

Whilst the SSAT Information Management team, supported by Oyster IMS, has led these processes, the engagement and involvement of business users has been critical because ultimately they own, understand and use the content.

Oyster IMS has advised the SSAT to run a pilot within the Information Services Department in order to validate the approach to content cleansing and migration and the design of SharePoint.

## The result

The SSAT are in a very strong position to run a full Document Management pilot exercise which will see a department using and contributing to the Document Management solution for the first time within the organisation. A clear and solid foundation has been laid to then establish the solution throughout the organisation. Oyster IMS have been further commissioned to assist with the implementation of the pilot, to conduct a post pilot review and to provide advice on the roll out to the entire organisation.

Oyster IMS were successful in establishing the Document Management project as one of best governed projects within the SSAT. The Information Services Department are now referencing the Document Management project as 'best practice'.



Professional Information Management is vital for all businesses, whatever their size. Dealing with the flow of information, both internally and externally, is the key to managing business efficiency and effectiveness. Oyster IMS provides consultancy and project management services in the field of Information Management. Areas of expertise include information audits and strategy; document and records management; data analysis and migration; document scanning, indexing and recognition; digital mailrooms.

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