

Overview

Location: United Kingdom
Industry: Health

Customer Profile

Hertfordshire Partnership NHS Foundation Trust (HPFT) is at the forefront of integrated health and social care and provides mental health and specialist learning disability services. Staff are based in multiple locations, many of which are part of other organisations.

Business Situation

Staff found it difficult to locate information, policy documents and other staff members using the existing SharePoint intranet.

Solution

Ultimately, a Cloud2 Solution Accelerator intranet was implemented to replace the previous intranet. This provided a rich information architecture, enhanced search, navigation and processes as well as a being visually more striking. This was combined with a complete server farm refresh.

Benefits

Replacing the original intranet has resulted in greatly improved access to information, a sense of greater inclusion of staff at remote locations and more comprehensive and robust processes and content structure. Users have seen a considerable increase in speed of access and reliability of the intranet, while the trust has a platform they can confidently add content to and build future services upon.



CASE STUDY

Background

Hertfordshire Partnership NHS Foundation Trust (HPFT) is at the forefront of integrated health and social care and provides mental health and specialist learning disability services. Staff are spread across multiple locations, often within other networks, yet need access to trust information resources for their day to day activities.

HPFT had previously invested in a SharePoint 2007 intranet, with the focus being on storing and providing easy access to policies and procedures across all staff. This project had not been as successful as hoped, with staff struggling to locate the documents they needed within the intranet. Furthermore, the intranet was not able to provide a comprehensive means of finding staff details through the staff directory.

Cloud2 were selected for a short timescale set of intranet improvements to address these needs, with a view to providing further enhancements in a later phase .

The Solution

Analysis

Cloud2 assessed the existing intranet and identified a number of key limitations that were preventing it reaching its potential. Development of the Information Architecture was limited, largely emulating a hierarchical network directory structure rather than taking advantage of the advanced metadata driven options and Content Types available in SharePoint 2007 libraries. This had a knock on effect of limiting the capability of Search, with search terms returning too many possible results.

“I do believe you have done it! The searches work, the facets are very useful and I think the site looks great ”

Patricia Brough, Head of Informatics

It was also found that staff not based at the main trust locations (notably those within the Hertfordshire Council offices and in the Norfolk domain) did not have Active Directory profiles.

The intranet was running on minimal server infrastructure.

The initial plan was to extend the document model, adding library views, content types and extensive metadata (based on the standard Cloud2 metadata model with additional elements requested by HPFT) and to use this to extend search. Additionally a better staff directory model was proposed, with all staff included in Active Directory (AD). Some minor visual design issues affecting the home page were also to be rectified.

Challenges.

In common with many such projects, effort had to be invested in designing the information architecture - how content is structured, named and placed within the system. Cloud2 has a design principle that tends towards a small number of document libraries, with discrete libraries for Policies and Procedures and some other type of content. Reaching a common understanding on this, the extended metadata desired and the document publication process in order to complete the IA design required considerable discussion.

The project needed to be delivered within the culture and processes of the trust, requiring understanding of the organisation's ability to accommodate change, close working with stakeholders and planning for the changes the project should effect within HPFT.

As noted, the existing server farm had not been designed for high availability. During delivery of the upgrades the farm began suffering outages

Challenges overcome

No project ever seems to run completely smoothly. Challenges faced and overcome included:

- Instability of existing server farm
- Incomplete application of Active Directory to all staff
- Complexity of agreeing a suitable Information Architecture
- Need to limit features and capabilities to those the trust could accommodate
- Migration of content from old intranet, compounded by a metadata conflict between Office 2003 and 2007
- Need for remote access to the servers
- Inadequate backup solution
- Resetting of project objectives and deliverables to ensure success

What Next?

If you would like any further information on SharePoint solutions or any other services Cloud2 offer please get in touch.

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related to SQL table corruption, leading to a complete system failure. It was discovered that the backup regime was inadequate and a restore could not be achieved. Cloud2 was able to rebuild SQL manually and recover most of the old intranet, however it became clear that the farm was unsupported; it had a major impact on project timelines, caused repeated loss of deployed enhancements and affected user confidence. A more radical approach was needed.

Going the extra distance

The early project issues coupled with the infrastructure failures threatened to undermine the entire project. To avoid this, HPFT decided to invest in 4 new servers, configured to provide a robust, high performance and resilient environment based on recommendations from Cloud2. To match this commitment to achieving a successful project, Cloud2 offered to completely redeploy the intranet based on their advanced NHS intranet Solution Accelerator.

In order to avoid overwhelming staff with too much change, it was decided to hide some Solution Accelerator features, including the Directorates, Performance and Programmes areas. The deployment concentrated on the Home Page, the Document Centre and the Information Centre. The Solution Accelerator's default IA was already closely aligned with the trust's needs and configuration was relatively simple.

The new intranet, branded as Trustspace, includes a variety of features to improve 'findability' of information, including an enhanced search (comprising *Faceted search*, *Go to container*, *extended people search*); Recent Document lists, 'Hot Docs', and more. A tag cloud function was deployed, but had to be hidden due to it growing too long; this will be reinstated once the code has been revised. One of the Cloud2 recommended themes was adopted by the trust project group to improve the visual appeal of Trustspace.

A challenging target of go-live on 1st July was set, providing just 6 weeks to install, configure and complete content migration from the decision to adopt the Solution Accelerator approach.

The old intranet contained some hundreds of policy documents, an equal number of other documents (in Office 2003 format) and a few dozen 'Section pages'. These were physically migrated by Cloud2, with HPFT staff updating them once migrated. An 'interesting' issue emerged where SharePoint was prevented from altering certain metadata fields in the migrated documents. The solution was to convert the



documents to Office 2007 format and use the Inspect Document feature in Word 2007 to remove the problem metadata. HPFT had rolled out the Office Compatibility Pack allowing Office 2003 to open the new formats and this provides further benefits: e.g. reduced file size offer faster load times. The trust is now planning a migration to the latest version of Office.

All users were given an Active Directory account, this ensured the extended people search functioned as intended. The trust was also encouraged to allow users to create My Sites, allowing better personal profiles to be created by staff, though with constraints on use at this stage.

The trust is working towards the intranet being the core working environment—the one place staff go for their knowledge worker activities. A web part was provided on the home page that allowed users to launch Microsoft Word, Excel, PowerPoint and several trust specific applications, directly from the intranet.

Benefits

Trustspace went live, as planned, on 1st July 2009. During the first 2 days of go-live further improvements were made to the search configuration resulting in staff being able to find documents far more easily than previously, while also providing inbuilt facilities for managing documents and policies. All staff are now on Active Directory and hence appear in searches. Local staff no longer need to log in to the intranet.

Conclusions

Hertfordshire Partnership NHS Foundation Trust Implementation was initially challenging, with a 'simple' set of enhancements proving impossible to deliver on the hardware available. However a far more fully featured intranet was ultimately provided which exceeded the trust's expectations. The project team are now looking towards a second phase project to introduce further features and processes.