



Setting Standards in Information Management





NSAI

Leading by Example



*As a national standards and measurement body, the National Standards Authority of Ireland's (NSAI) strategic purpose is to **improve the performance of Irish business** and protect consumers through the setting of standards and issuing of certification in the quality and safety of goods and services.*

NSAI's aim is to inspire consumer confidence and create the infrastructure for products and services to be recognised and relied on, all over the world.

*"At a technology level, we want to be meeting our clients' needs... as a document-centred organisation we needed a better IT infrastructure. SharePoint is an infrastructural improvement, fully supported at senior and board level."
(Brigid Hanley, IT)*



Why?

A review of IT processes pointed to the storage of large volumes of content in an unstructured and unmanaged way on shared drives (the S:Drive), causing operational deficiencies, compliance risks and increased IT costs.

A decision was made to assess the potential of developing and adopting a new approach to Information Management, to leverage greater efficiencies in document and knowledge management across all departments. A Microsoft SharePoint platform was introduced, with limited success, due to the enormous benefits that should have accrued from its introduction not being fully leveraged. We were not attaining the gains needed to ally with the company's newly established corporate Lean initiative.

***"We were efficiency focused with external client-facing projects but were not getting far with internal client-facing work...we needed to improve this aspect of our operations and asked ourselves: was there a way to do it better and more efficiently?"
(Brigid Hanley, IT)***



A new focus and direction was needed to:

- deliver effective and efficient enterprise content management
- maximise cost reductions and operational efficiencies for the entire organisation

The SharePoint Maturity Model, or strategic roadmap, gives organisations a holistic view of SharePoint implementation. It is a framework which leads to:

- greater business process efficiency
- a more trustworthy SharePoint environment
- happier, more empowered users
- more innovation time



"Central Solutions had excellent knowledge of SharePoint, could work with each of the internal divisions, get them comfortable with what SharePoint could do and incrementally make the improvements needed."

And so...discussion with SharePoint experts  Central Solutions began.

SharePoint Impact



Extensive cross-departmental consultation was undertaken to:

- map the knowledge management environment;
- prioritise high-level goals; and
- identify specific improvement projects.

SharePoint roll-out was adopted to:

- Mitigate risk
- Minimise the disruption to day-to-day operations
- Facilitate greater user engagement and adoption

The impact was immediate and evident.

- Key lines of business projects were successfully identified, prioritised and delivered.
- Immediate performance improvements were attained while building confidence in the platform.
- Quantifiable cost reductions were realised through on-time delivery and, within budget.
- Business managers and users became fully engaged and motivated and took ownership for SharePoint implementation in their respective areas.
- Greater transparency and focus at managerial level resulted in an increased ability to control risks and costs, therefore ensuring success.

The sample SharePoint stories that follow have been selected to illustrate the tangible value and benefits that have been derived from migrating to Microsoft SharePoint, across the Core Competencies of Publication, Collaboration, Business Process and Search.

"The infrastructure has been set up; key projects and processes have been implemented; and the feedback is positive."



Reception Roster



Department: Corporate Services
Project Champion: Gwen Thornberry

Key Issue Addressed

- Roster team unable to access or change roster calendar on Outlook
- Potential of no-shows at reception desk for break coverage



SharePoint Solution

SharePoint calendar created and synched with Outlook.



Before

"Before SharePoint, rostering for daily tea and coffee break coverage was managed by Corporate Service's Outlook shared calendar and was very time-consuming. It was accessible only by the department director and secretary. Two calendars were required: 3-monthly and daily. Changes were managed interpersonally resulting in changes not always being reflected on the online calendar, and potentially causing no-shows..."



After

"Everything is now on SharePoint. Users can see everyone's roster and can access the calendar to make changes. Team members get pop-ups in Outlook and an email reminding them of their roster times. There is full visibility and it's fully synchronised with Outlook. Roster team now have control, can change roster and see who is available. Onus rests with team member to find replacement cover."

"It's an easy-to-use, clear and concise system."



Value/Benefits

1. No need for 3-month advance roster
2. Roster calendar accessible by team and changes easily made
3. Emails automatically generated for scheduled changes
4. Changes immediately visible to the director and secretary
5. Minimal disruption to work practices; calendar synched with Outlook
6. Updates and changes can be done using either SharePoint or Outlook



"Eliminated 99% of the issues we were having - related to mix-up for reception cover."

"It's an easy-to-use, clear and concise system."



LM Document Management



Department: [Legal Metrology](#)
Project Champion: [Paul Turner](#)

Key Issue Addressed

- Duplicate files and folders on department's S:Drive, in email accounts and other applications
- Staff not fully conversant with S:Drive content
- No agreed classification structure
- Need to eradicate duplication



SharePoint Solution

New classification structure and document retrieval simplified.



Before

"We used the S:Drive to record files and folders in headquarters which resulted in a huge mass of data being duplicated. Following a comprehensive system review and clean out, we migrated to SharePoint and shut down the S:Drive. While still somewhat in the S:Drive mindset, we can see the value we can get from SharePoint."



After

"We streamlined everything before migration and now have a new classification structure. Document retrieval has been simplified and it's so much easier to see the graphics. We now need to maximise SharePoint's full potential. Once we get proficient with the 'Search' facility, the optimal benefits will flow. It's a culture change."



Value/Benefits

1. Easier to search for documents and use shortcuts
2. Multiple authors can contribute to documents
3. Key information and documents accessible by everyone
4. Business processes that revolve around documents streamlined
5. Certs automated; record keeping improved; audit requirements met
6. A more secure, easier-to-manage system; savings in applications development



"All document management is now completed on SharePoint; it's one business process managed by a single platform."



"It's a culture change."

Calibration Certificate Process



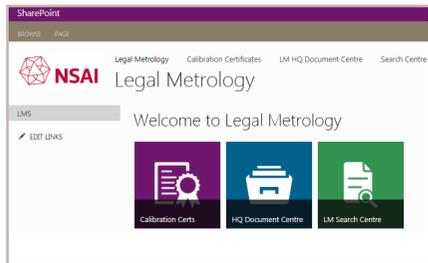
Department: Legal Metrology
Project Champion: Fiona Noone

- Key Issue Addressed**
- Manual recording of calibration certificates lacked control and oversight
 - Difficult to find copies of signed certification
 - Process required automation



SharePoint Solution

Ability to upload soft copies, triggering alerts; process automated.



Before

"Signed proving equipment calibration certificates, which originated in the lab, were sent manually to Legal Metrology. This information was then filled in on the system index, photocopied, filed, and the original was sent to the client. It was a 6-step manual process."



After

"The lab and department are now on the same system. Online alerts are sent to notify that calibration is complete and certificate being sent. It is then scanned onto SharePoint and index automatically populated. Scanning populates meta data so no online filing, no copying and no paper; process takes less time. It's an 'All-in-One-Step' process on computer."



Value/Benefits

1. Tighter control and management
2. Administration time, paper and physical storage savings
3. Department's carbon footprint lowered
4. Certificates readily available for re-issue
5. Certificates easily located using SharePoint Search
6. Less manual intervention
7. No Calibration Index spreadsheet



"It's great to have the PDF versions of the certificates and to know where they are located."



"It's an 'All-in-One-Step' process on computer."

National Metrology Certificates Process



Department:
National Metrology Department
Project Champion: Paul Hetherington /
Dubhaltach MacLochlainn

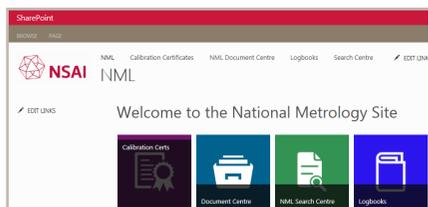
Key Issue Addressed

- Manual process of issuing calibration certificates for national measurement standards needed to be automated and controlled more easily.



SharePoint Solution

Digital signatures triggering workflow and approval process, certs converted to PDFs and automatically copied to designated folder.



Before

"Calibration certificates required signatures, photocopying and scanning at multiple stages before being manually filed for subsequent retrieval: Location known to administration staff only. Certificates filed by cert number and difficult to find. Reissuing certificates caused frequent bottlenecks and was very time consuming. We needed a process to store certificates."



After

"A SharePoint process to store calibration certs was implemented. The calibrator uploads the cert to the appropriate document library and digitally signs the document. This then triggers a workflow which kicks off the approval process. The process also includes the converting of the cert to PDF and automatically copying it to a designated folder."



Value/Benefits

1. Controlled copies of calibration certs in single location
2. Improved record keeping and auditability
3. Time, paper and storage savings
4. Department's carbon footprint lowered
5. PDF certificates available to all NML staff
6. Enhanced Search capability
7. Significantly faster retrieval



"SharePoint well planned and implemented. We will now move from demo to practical roll-out with migration of documents."



"Certificates converted to PDF and automatically copied to a designated folder."

Homeportal



Department: Corporate Services
Project Champion: Eoin McCabe

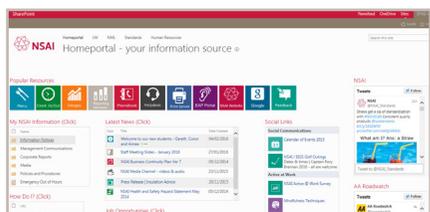
Key Issue Addressed

- NSAI Intranet needed modernisation and elimination of document duplication.



SharePoint Solution

A SharePoint Intranet site was implemented.



Before

"The old Intranet was very static, with ownership confined within Human Resources (HR). In considering SharePoint, we did not want another corporate NSAI tool; we needed a communication resource that would encompass everything in the company and give staff instant access to information that would help them work better."

After

"The Homeportal's tone has changed completely. It's more graphically organised with quick buttons, judged to be essential. It has a modern interface and includes social feeds. It is brighter and speedier, a better managed resource and a portal that is very current. Our experience with it has been very positive."

Value/Benefits

1. Modern interface
2. Links expire automatically without requiring intervention
3. Added features – Latest News, Social Links
4. Eliminated document duplication
5. Site updates easier
6. More user friendly
7. Social events viewable with one click
8. Linked to departmental site for easy access



"The NSAI Homeportal is a dedicated resource for staff on all aspects of NSAI communication, both corporate and social."



"Our experience with it has been very positive."

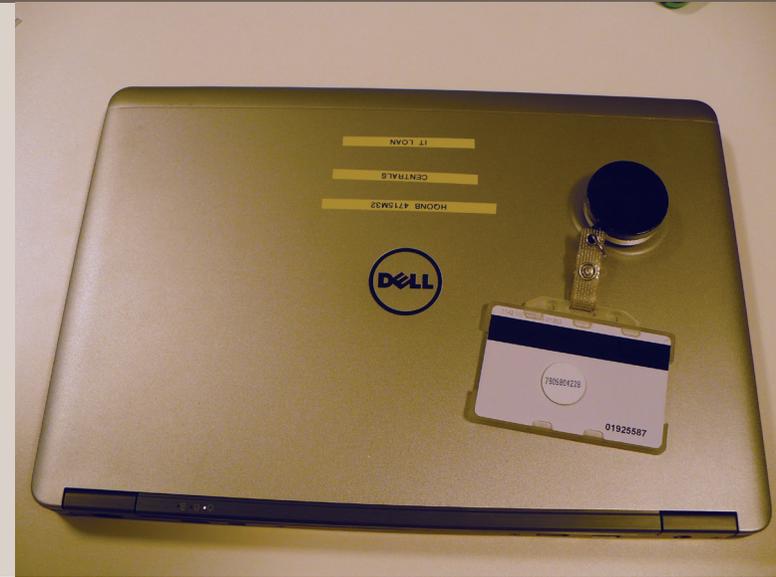
HR Starter Process



Department: Human Resources
Project Champion: Debbie Califf/Edel Lane

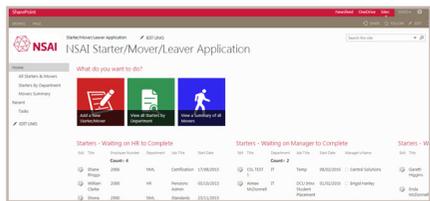
Key Issue Addressed

- Elimination of paper-based process for tracking and managing the processes and procedures associated with new hires.



SharePoint Solution

Customised SharePoint form introduced for electronic approval at all stages and stored in document library.



Before

"We needed to look at our document management. We had layer upon layer of folders in the S:Drive and with changes in HR, a lot of unnecessary archived files and folders. A multi-paged form for each new hire moved from HR to relevant manager to IT helpdesk with manual input at each step before being returned to HR for filing in employee's file."



After

"New starter details inputted to SharePoint by HR, triggers automatic email to relevant manager and on to IT. The process is very transparent; the shared information is online and we can now see where hold ups are. Everything is on SharePoint before the new hire arrives and we can now concentrate on welcoming them. SharePoint has definitely streamlined the process."



Value/Benefits

1. Hiring/induction process more tightly controlled/traceable hiring
2. Online prompts trigger completion of relevant section
3. Forms version controlled with changes tracked
4. Lost forms or reworks eliminated



"Everything is on SharePoint before the new hire arrives;"



"Has definitely streamlined the process."

New Participant Registration Process



Department: Standards
Project Champion: Victoria Ryan

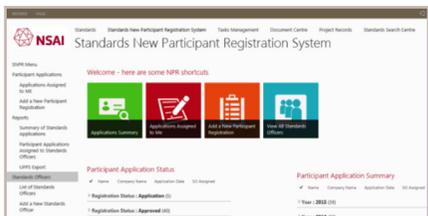
Key Issue Addressed

- Eliminate requirement for new committee participants to submit applications by mail, email, or fax.



SharePoint Solution

SharePoint integrated with the NSAI website and now the sole means of registration.



Before

"The registration process was very manual. We had multiple formats, used reams of paper, had to convert emails and manually upload them. We then had a document library into which all application forms were uploaded. Following feedback from the Standards group, a more streamlined process was deemed necessary."



After

"Potential participant completes form on NSAI website. Applications are exported daily to a SharePoint list and an initial status of application assigned to each new item. Administration staff reassigns to relevant Standards Officer, triggering automatic email notification. Status is changed to pending; applicant given access to relevant committee and status changed to approved."



Value/Benefits

1. Manual intervention eliminated
2. Applicant's status quickly visible by Standards Officer
3. Applications now in one place and in a single format
4. Elimination of multiple formats and reams of paper
5. No requirement to convert emails and manually upload



"From a project management point of view, this was one of the quicker projects Standards has undertaken. I can see it growing from a SharePoint point of view."



"I can see it growing from a SharePoint point of view."

Delivering a consolidated IT Platform to meet current and future needs



Department: IT
Project Champion: Brigid Hanley

Key Issue Addressed

- Large volumes of data stored by individual departments on S:Drives was operationally inefficient.
- Potential for operational, compliance and IT risks, plus increased IT costs.

"Security is inherent – more assurance – built in resilience that you did not get with the S:Drive."



SharePoint Solution



We needed to consolidate, through a single platform, multiple lines of business application development across the organisation, enabling better Information Management in each department.

Before SharePoint, we had:

- Limited ability to share and collaborate on documents
- Multiple versions of documents - difficult to find the correct one; document information retrieval was difficult and time consuming
- Poor information governance and security
- Inefficient document traceability for audit and compliance purposes

We needed a platform that could address both the mobility requirements of staff and the need to collaborate in a secure manner with external partners and stakeholders

Value/Benefits

1. Strategic platform for information management
2. More rapid and cost-effective line of business application development on a single system
3. Consolidated document management infrastructure and associated management cost
4. Faster information retrieval delivering organisation-wide productivity gains
5. Enhanced security and disaster recovery
6. Longer-term corporate information governance requirements met

"Central Solutions has assisted us to align the needs of individual business units with the overall information management strategy of the organisation, through the effective and efficient use of Microsoft SharePoint. This work is ongoing and linked to other corporate priorities such as Lean."

"SharePoint is the glue that enables NSAI to collaborate, search, improves business processes, manage knowledge and enhance reporting, across multiple systems."

"We have a clear policy on how we decide which project should go ahead."



People... a Critical Component of SharePoint Adoption

SharePoint is different from other IT platforms. Its success is not achieved in the same way as other traditional IT projects. While technological expertise is important to deliver long-term transformational impact, SharePoint's success is very much **People-Driven**.

Its roll-out requires Business Managers and Users:

- that are **motivated, fully engaged**, and who take ownership of the process through buying into it
- who have the ability to **project manage**, have the technical expertise to manage a change process, and can carefully select projects to deliver incremental change, through agile development
- with an ability to initiate and **manage training** and the adoption of new processes to ensure longer-term performance improvements
- can choose and assimilate with a **multidisciplinary team** of experienced SharePoint professionals
- can **manage all stakeholder** expectations
- have excellent **reporting** and **feedback** skills

The migration to SharePoint in NSAI, as demonstrated by the case stories presented here, perfectly demonstrates the requirement to synchronise client relationships and programme management. The SharePoint technical team must be able to integrate seamlessly within the organisation. They must be valued as the trusted partner that works with management and IT staff in an environment where user and process needs are aligned with technical solutions.

It's a relationship that empowers excellent results.

NSAI and Central Solutions... Together setting standards in SharePoint adoption.

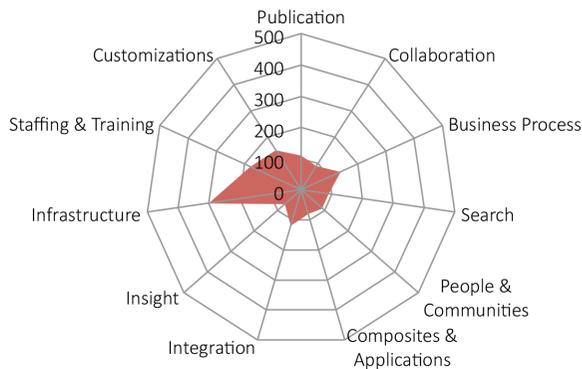


***"The flexibility shown by Central Solutions Limited during the development process resulted in the delivery of a much better process. We now have applications uploaded to a SharePoint document library."
(Victoria Ryan)***

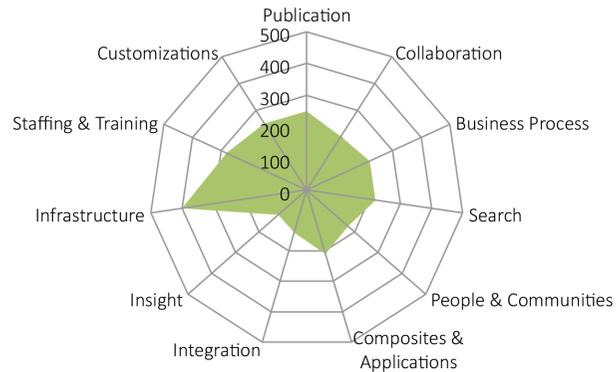


SharePoint - A Multi-Stage Adoption Process

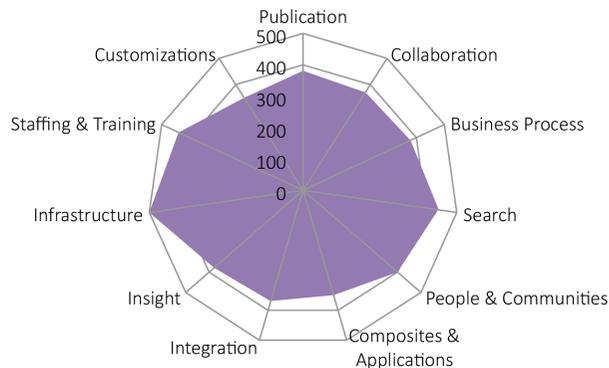
SharePoint Maturity Levels
After Year 1



SharePoint Maturity Levels
Target End Year 2



SharePoint Maturity Levels – Target Long
Term



SharePoint Level
500 Optimizing
400 Predictable
300 Defined
200 Managed
100 Initial

↑ Maturation



"The infrastructure has been set up: the processes that were looked at have been implemented and the feedback is positive."





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