Case study

Sector	Education
Service	Bespoke Software

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Cutting Costs Not Trees

Manchester Metropolitan University (MMU) wanted to modernise their method of distributing documents, to progress a 'green' agenda whilst also reducing cost and waste. We were certainly up for the job!

Alison Dent
CSER Lead

Email alison.dent@waterstons.com
Linkedin https://www.linkedin.com/in/alison-dent/?originalSubdomain=uk

Results at a glance

- Easy and secure access to documentation
- Efficient workflow management
- Environmentally friendly and improving green credentials
- Reduction in external training costs

Background

MMU's Governance and Secretariat team are responsible for planning meetings for 27 committees, which comprise a mixture of MMU staff and external members, and they meet several times each academic year. This planning involved the assembly of a collection of documents which had to be printed and delivered to each committee member in advance of the meeting in the form of 'meeting packs'. This was a time-consuming, expensive, and wasteful process.

Additionally, the team is responsible for locating and extracting documents from previous meetings when requested by committee members. As the document store grew, this was becoming less and less practical.

MMU wanted to find a way to improve this process – removing the need to print and physically distribute the documents – whilst ensuring that records were kept in accordance with the University's strict record retention policies. MMU believed that this could be the perfect pilot phase for the wider implementation of a complete SharePoint solution to aid collaboration and provide efficient document storage and management.

Partnership

Following a competitive tender process, we were selected to partner with MMU. This was thanks to our excellent understanding of the higher education sector, and our extensive track record of delivering large-scale SharePoint solutions to other institutions.

Our ability to work flexibly and pragmatically appealed to MMU as they knew the end product would match their requirements. Our approach meant MMU were able to refine the project scope throughout the project, allowing them to continue with development without having to define everything upfront.

Working collaboratively, a team of MMU project managers and our consultants was established. This collaboration allowed MMU to be involved throughout the project lifecycle. They were able to understand the setup and configuration from the beginning. Regular meetings and workshops meant they could see how we were progressing and to give feedback on the site. At the end of the project, we delivered training on the new platform. This was a combination of user training to enhance user adoption, and 'train the trainer' tuition.

Implementation

We designed and implemented a SharePoint team site for the Governance and Secretariat team which provides:

- A document library to hold all the items to be discussed at each meeting
- Secure access to the site with a personalised view for each committee member, showing tasks and their diary
- The ability to view documents in the web browser
- Easy access for committee members using SharePlus, a third-party app, on an iPad
- Remote access using SSL Certification with all users authenticated using Active Directory (Windows) authentication
- A separate SharePoint Records Centre to where documents can be sent, with workflows to enforce the document retention policies

We also wrote some specific pieces of bespoke functionality to help the Governance and Secretariat team:

- Automatic security restrictions on uploaded documents. Committee members can only view documents related to their own committees, without the need to manually set permissions on individual documents.
- Custom workflows created to control document retention and expiration in the Records Centre. This allows document owners to receive email notifications at specific intervals to let them know that a document is going to expire.

Using the SharePoint team site has brought clear advantages to the Governance and Secretariat team, including the following:

- MMU has streamlined the admin of its planning meetings, saving both time and money.
- MMU has reduced waste by cutting down on the paper used in its admin process. Committee members can access information 24 hours a day, wherever they are, with an internet connection.
- The information held is secure and accessed only by those who allowed view it, in line with the University's retention policies.
- With MMU IT involved from the outset, their team are now able to manage, support and if required, further develop the site to meet any changing requirements independently.
- The University can educate their users and perform induction sessions with new starters without the cost of employing external consultants or trainers.

Benefits All Round

Following on from the initial project, we were able to empower other areas of the University to discover the benefits of SharePoint.

A team coordinating the University's move from a satellite campus to the main campus subsequently used a SharePoint team site to share architectural plans, using custom metadata to organise documents according to building and level. This saved them time and confusion as documents were stored centrally rather than emailed back and forth, and provided easy access to the latest versions of the plans.

Some staff have also since created My Sites, which are personal sites allowing users to store documents and create blogs to share information with their colleagues. We were also approached by MMU to create a bespoke web part, which presents academic timetable data from a third-party system and can be added to pages within SharePoint.