

# cloud2

Countess of Chester Hospital NHS Foundation Trust implement SharePoint for clinical document management

## Overview

**Location:** North West  
**Industry:** Health  
**Trust Type:** Acute

## Customer Profile

Countess of Chester Hospital NHS Foundation Trust is a 550 bed hospital, offering a full range of inpatient, outpatient and day case services, kidney dialysis & urology assessment, cardiac catheter lab, eye centre and a modern day surgery centre. It provides these services to over 400,000 patients per year.

## Business Situation

The Trust wished to replace their aging document management solution which was proving cumbersome to update, had a poor user interface and lacked search capability. Finding information was difficult and the system was becoming increasingly unstable.

## Solution

The Trust engaged Cloud2 to develop an enterprise document management solution with rich metadata and an enhanced search solution based on Microsoft® Office SharePoint® Portal Server 2007

## Benefits

Improved ease of use, fast & effective faceted search and sophisticated metadata have greatly improved document 'findability', ease of management of Policies and auditability across the trust.



## CASE STUDY

## Background

The Countess of Chester Hospital (COCH) NHS Foundation Trust provides medical services to more than 400,000 patients per year across Western Cheshire, Ellesmere Port, Neston and North Wales.

The Trust has won the prestigious 40 Top Hospitals Award for nine consecutive years, one of only a handful of Trusts in the country to achieve this.

COCH had a legacy Trust-wide document management system, installed several years previously. Although it was the best solution available at that time, the technology had become dated and the Trust decided to replace it with a Microsoft Office SharePoint Server 2007 based solution. The Trust was attracted to this choice of technology by SharePoint's Office integration, intuitive interface

*"SharePoint has provided us with a powerful document management system with rich metadata and enterprise search capability. We're very pleased with the work done and look forward to building on this..."*

*Garth Knipe, Project Manager*

## The Needs

**Improved approach for accessing, uploading, creating and updating Policies & Procedures**

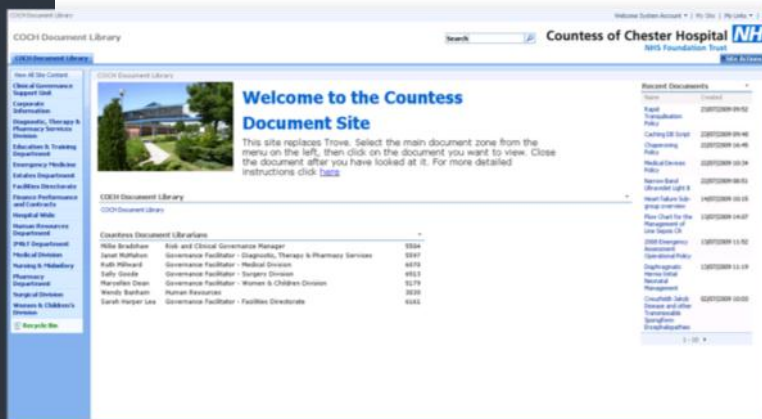
Finding the right policy was often a time consuming and frustrating process for users. The legacy document management system presented users with just document links; the user was required to open the document in order to confirm that it was the one they were looking for.

The requirement was to deliver a vastly improved user interface (UI) that would provide staff with additional information (metadata) about the document to clearly identify the correct document before opening it. In addition, the project team were hoping that the solution could support their Information Governance audit requirements by automatically creating views of all documents that met certain IG criteria e.g. All Policies & Procedures that have been tagged with specific Care Quality Commission (CQC), NHSLA (Litigation Authority) standards.

## Powerful search and retrieval capability

The lack of search in the old system had been identified as a major weakness. The Trust desired a rich search interface to allow users to rapidly locate policies and other documents at the point of need. The search facility needed to provide both full text searching capability and indexing of the document metadata.

The search interface needed to provide the benefits of advanced search techniques without users having to be trained in "advanced searching skills"



and extensive functionality: enterprise search, rich document management metadata and content types etc.



## About Cloud2

Cloud2 are a specialised IT solutions provider operating in the health sector.

We are known for our high quality SharePoint based solutions, our frank and supportive project style and our ability to deliver successful projects rapidly. We have much to offer, including:

- NHS Intranet, Extranet and Internet solutions
- Rich search solutions
- Agile workflows
- Access database migration
- Programme and Project Management
- BI & Performance Management
- Length of Stay reduction

## What Next?

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

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The information architecture and general organisation of Policies & Procedures had to be addressed to improve navigation between different categories and classes of document e.g. source department, clinical area etc.

## The Solution

### Document Management

Cloud2 worked with COCH to identify the Trust's key document types and to define the SharePoint Content Types and metadata selections, in order to use the extensive and proven DMS capabilities of SharePoint 2007.

Importantly, considerable additional effort was invested to refine the options and UI for the metadata fields: lookup, choice etc. in order to present a user experience that staff would be happy with yet collected as much detail as possible. This proved to be of great value in the rollout of the solution.

Version control is also important, providing a history/audit trail of minor and major document versions complete with changes in metadata and content tied to the date and the person making changes.

### Search & Retrieval

SharePoint's out of the box search provides full text searching as well as the ranking of search results based on metadata and is considered very powerful; however it can result in a 'Google search' problem of too many results.

This problem can be partly overcome using the Advanced Search capability in SharePoint, which provides the ability to run the queries for:

- 'All of these words'
- 'An exact phrase'
- 'Any of these words'
- 'None of these words'

It enables Boolean searching on document properties using multiple "AND" and "OR" operators allowing complex search queries to be run. The issue, as noted previously, is that most users are not proficient with building these more sophisticated search expressions.

To overcome this, Cloud2 installed and configured the Faceted Search v3 extension to SharePoint search; this adds an intuitive categorisation panel to the right of the search results that allows users to filter the search results to one of the organisation's categories. This offers greatly enhanced 'findability' compared with most current search

technologies.

The Faceted Search categories selected for the Trust included division, speciality, department, document file type (Word, PDF, Excel or PowerPoint).

SharePoint's alerting capability is also being adopted, which has the benefit of automatically notifying users of updates and additions via email rather than expecting them to periodically check for changes. Alerts can be setup on documents, lists, libraries, whole sites and even on search results. This notification can be used as a clear trigger to a business process or workflow.

## Benefits

- Greatly improved ease of use has encouraged better staff take up
- Faster search and retrieval of policies & procedures reduces the time taken to find documents
  - Rich capture and display of document metadata combined with quick to access (and easily extended) views of Policies & Procedures documents aids document location and supports the ongoing need for audit. A full audit trail is maintained for previous versions of documents
  - Librarians and related staff have not needed to develop deep technical skills
  - Purchase of licences under the Microsoft NHS Enterprise Agreement provides Best Value
- Short learning curve and training requirements through use of Microsoft technologies
- Use of out of the box SharePoint capability reduced the cost, complexity and time to deliver

**COCH have succeeded in achieving a sector leading document management solution that is easy to use for librarians as well as end users who need to find key Policies & Procedures. It provides rich reporting capabilities for the Trust's IG audit requirements"**

*Taran Sohal, Director, Cloud2*

## Project approach

The solution delivered is consistent with Cloud2's approach to early phase SharePoint projects, focused on configuring features and minimising custom development. In most cases a rich solution can be developed by configuring SharePoint's standard functionality or using well developed plug ins, resulting in better value for money and improved supportability.

## Conclusions

The Countess of Chester Hospital (COCH) NHS Foundation Trust have been able to redevelop their document management system using SharePoint to provide a trust-wide, enterprise class system. In keeping with their status as one of the country's top Trusts their document management solution is now amongst the very best in the NHS.