



## Case Study: The Eastern Health and Social Services Board



### What our client said

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Mark Eustace,  
Systems Development  
Manager,  
EHSSB

### The Challenge

The Eastern Health and Social Services Board (EHSSB), based in Belfast, is Northern Ireland's largest health and social services organisation, with responsibility for the care of some 665,000 people who live within its area.

The EHSSB relies on effective document management and workflow to perform efficiently and effectively. Yet it was the imperative to comply with the Freedom of Information (FOI) Act which provided the recent impetus to transform the Board's records management activities once and for all.

Recent legislation, in particular the Data Protection Act of 1998 and the Freedom of Information Act (FOI) of 2000, in addition to long-standing legislation such as the Public Records Act (NI) of 1923, demands that the records management function in public authorities conforms to strict standards – standards which the EHSSB has now sought to fulfil.

Email had become a significant challenge to the organisation. Over the years, information exchange had been taking place increasingly over email, with the result that the EHSSB's records management activities were weak, according to systems development manager Mark Eustace.

The challenge was compounded when a restructuring of Northern Ireland's health and social services organisations led to a merger of four health boards, which now fall under the responsibility of Mark's team. To enable the various departments to integrate with each other, and overcome geographical constraints, Mark needed to harness technology which would ease the flow of documents around the wider organisation, and maintain control over different document versions.

### Solution Overview

Recognising that the challenge was as much cultural as technology based, EHSSB enlisted the help of independent IT consultancy, Kainos, which specialises in document management and workflow solutions and related services.

“We formulated a strategy to implement a centralised electronic document and records management (eDRM) system, which also meant educating staff to work differently,” Mark explains. For example, whereas individuals had been used to storing documents locally on their machines, they would now be encouraged to store them centrally, to avoid duplication and excessive storage demands.

The chosen eDRM system is from Meridio, a Microsoft Gold Partner. Because of the close relationship with Microsoft, the Meridio system works well with Microsoft Outlook, enabling the effortless integration of email into the records management process. Meridio was also 30% cheaper than rival products in terms of both software licensing costs and man-day rates, Mark notes.

After an initial pilot the system has gone live right across the EHSSB, where it is now the core single records system.

During the structural reorganisation, Mark's team lost a couple of key members of staff, which increased EHSSB's reliance on Kainos's services. Thanks to a strong partnership relationship forged between the two organisations, this was able to happen seamlessly.

Crucially, Kainos is also providing expertise and advice on the integration of the new eDRM system with workers' mobile devices, including BlackBerries, so that employees can be fully productive wherever they are.

## Benefits

EHSSB is already experiencing a host of benefits from its eDRM system. These include the ability to share documents very easily and in a managed way, without having to circulate content via email. Importantly, emails are now managed alongside other records in compliance with information management legislation, as the decision-making process can now be firmly tracked across email threads. Meanwhile, the central storage of documents means less demands on email capacity and bandwidth, with version control ensuring greater accuracy and consistency, and saving time and duplication.

Reliance on paper copies of documents is beginning to be eliminated, too. "People are now increasingly taking laptops to meetings, not paper." As well as being more efficient, this helps EHSSB meet its responsibilities towards the environment.

Having the comprehensive support from Kainos has proved vital, too. "We couldn't have done it without them," Mark says. "They have been excellent, and a pleasure to work with. The technical people really know their stuff which saved us several days of potential downtime when the server hardware developed a problem recently."

Kainos's skills on remote integration and connectivity are proving invaluable, too, Mark adds. "All of this can only work if it's accessible by mobile - via wireless and 3G. Otherwise, you'd end up falling back on paper when out and about, which would undermine everything we're doing. Kainos is providing great service and support here."

## The Future

In addition to continuing work on the mobile extension of the eDRM system, EHSSB is currently investigating the Microsoft SharePoint application for possible future use

This would integrate easily with the Meridio eDRM system, making it even easier to share documents among dispersed teams, if EHSSB secures the funding to proceed with this next stage of the project.

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