



CASE STUDY

Laois Offaly Education Training Board

Digitising HR records and delivering an online Document Management System across 26+ schools and education institutions.

SECTOR
Education

SERVICE
HR Digitisation & DMS

PROJECT
2024



THE CLIENT

Laois Offaly Education Training Board

On 1st July 2013, the 33 Vocational Education Committees (VECs) were dissolved and replaced by 16 Education and Training Boards (ETBs) located around the country. Education and Training Boards are statutory education authorities with responsibility for education and training, youth work and a range of other statutory functions. They manage and operate Community National Schools, Post-Primary Schools, Further Education (FE) colleges, and a range of adult and further education centres delivering education and training programmes.

Education and Training Boards are the driving force of education and training in the local community, with pathways for every learner across Early Education, Community National Schools, Post primary Education, Further Education and Training, Apprenticeships and Traineeships, Youth Services, Outdoor Education Services and Community Education Services.



PROJECT OUTLINE

From physical archive to online DMS

The Laois Offaly ETB has over 26 schools and education institutions under their remit. Recognising the need to seek improvements in the way they managed HR records, the Laois Offaly ETB went to tender in early 2023. Their requirements included the digitisation of their HR records and the provision of an online document management system.

Kefron was successful in winning the tender. The project ran through the full span of 2024 including early Business Analysis phases to testing, staff training and handover and involved the development of a new document taxonomy, dual migrations, the full legacy digitisation of an associated 130K documents and just over 200K pages imaged as well as the provision of an online Document Management System.

26+

Schools and education institutions under the ETB's remit

130K

Legacy documents fully digitised

200K+

Pages imaged

2024

Full-year project, from Business Analysis to handover

2

Migrations into the new Document Management System

1

New universal document taxonomy for all HR records

Key Challenges

Managing HR records across a physical archive and disparate digital locations.



Restricted Access

The documents were stored in a physical file archive but access was a problem due to difficulties with manual access control and limited categorisation of documents within the files.



Time & Collaboration

This meant of course that staff were spending a lot of time requesting and then accessing the documents and files needed. File sharing and collaboration was also tricky as the files were in physical format and therefore not available online.



Inconsistent Processes

To help improve file management, the LOETB had developed some processes to digitise documents and to manage born-digital files it proved difficult to ensure consistency and coordination across the different ranges of documents and processes used.



Scattered Digital Files

As well as that, digital documents ended up being stored in disparate locations across the LOETB network so locating the digital file was taking longer than necessary.



Compliance & Key Dates

Finally, with HR files there are compliance requirements related to HR policies, employment contract management and document retention. Key dates such as contract dates are essential to ensuring the correct policies are applied and when. In many cases, key dates were omitted from the document metadata and so documents couldn't be managed using the necessary date information.

Key Services

From taxonomy design to digitisation and migration into a metadata-driven DMS.

1

Universal Taxonomy

As a really critical first step, Kefron worked with the LOETB to implement a new universal file and document taxonomy. This was essential ensure accurate metadata was recorded for all documents ultimately stored in the document management system. This included recording of the key dates in the documents such as contract start and end dates.

2

Digitisation & Classification

Once the document classification was agreed, 800 HR records were digitised and classified over a 4-month period. The project duration was important because the time that the LOETB were to be without access to their physical or digital files needed to be minimised.

3

Migration to the DMS

The next key step was the migrate the Kefron scanned files and the files already stored on LOETB servers to the new document management system.

The SaaS system provided by Kefron doesn't employ a typical folder-based set up, where users are left wondering where exactly they should save a document — for instance in a personnel folder, a project folder, a topic folder etc. Instead, the system uses pre-agreed metadata tags to describe the document content such as the employee name, the start date, the due date, or any relevant data.

Key Services

Testing, training and hands-on support to build trust in the new system.

4

Comprehensive Testing

The migration was carefully planned to include a comprehensive suite of tests to ensure that all aspects of the DMS functionality and configuration matched the LOETB's requirements and the 'client vision'.

5

User Training

Finally, as with any significant digitalisation project, it was vitally important that users were included in the journey and Kefron provided system training to bring users up to speed as quickly as possible and developed trust in the system.

6

Project & Account Support

Kefron's project and account management teams were on-hand throughout the project to guide and assist the LOETB team achieve their aims. This support helped the LOETB staff to process the changes and become comfortable with the new technology.

According to Kefron's IM consultant Stephen Mackey,

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Key to the success of the service was the engagement and end to end involvement of the right people on both LOTB side and Kefron at a steering level to ensure all the moving parts came together at the right time. Access to the content was recognised early on as a must have for end users and trust that it was delivered correctly and that finding the right information was easy and intuitive.

— **Stephen Mackey** IM Consultant, Kefron

KEY BENEFITS

A single source of truth for every HR file

- ✓ The obvious benefit of the project is that all LOETB files are safely secured in digital format online and backed up.
- ✓ The system provides an easy-to-access single source of truth for all files and LOETB staff both in office and working remotely can store, locate and manage files based on a number of different metadata fields supported by a single new universal taxonomy for all HR records.
- ✓ Having a central source of information has been a significant change to the LOETB way of working from the previous dependence on hardcopy and the risk of files going missing or being stored in different location is completely eliminated.





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