INFORMATION MANAGEMENT

Introduction
2.5 quintillion bytes of data are created each day

90% of all data was created within the last 2 years

293 billion emails are sent each day - expected to reach 347 billion by 2023

The average office worker receives 120 emails per day
Information Management

Collection, storage, processing, dissemination, analysis, archiving, protection and destruction of information.

**Enabling the effective use of** time, resource and expertise to make decisions and fulfil organisational goals.
Technology-driven process for analysing data and presenting actionable information to help executives, managers and other key stakeholders make informed business decisions.

Requires collaboration from people with business knowledge, data analysis skills and technical expertise.
Are you doing it well?

Is your business information...
- Quickly and easily accessible
- Transparent, verifiable and secure
- Reliable, relevant and current
- Managed in a consolidated environment

Do you have...
- Detailed activity reporting (volumes, throughput, performance)
- Trends and statistical analysis
- Detailed auditing
- Global search
Do you know...?

- The quantity and status of customer enquiries received last week?
- The status and value of all outstanding invoices?
  - validated
  - approved
  - rejected
- How many applications were processed?
  - last month
  - per employee
  - by type or location
- How many staff are required?
  - per shift
  - per team
  - per activity
Legal Obligations
INFORMATION MANAGEMENT

Key elements
INFORMATION MANAGEMENT – KEY ELEMENTS

CONTENT MANAGEMENT

STRUCTURE & GOVERNANCE

BUSINESS INTELLIGENCE

PROCESSING & WORKFLOW

REQUEST → VALIDATE

PROCESS ← APPROVE
two more critical elements...
Office 365
What is office 365?
What is office 365?

flexible and cost-effective licencing structure
Integrated collection of cloud services & apps
Constant improvements and new features
Significant business improvement opportunities
Single platform for multiple business applications
What is office 365?

These are some of the more powerful apps capable of supporting all business processes.

Flexible and scalable to grow with your business.
What is office 365?

Let’s take a closer look at...
Office 365 applications

- Content management
- Publishing and approvals
- Versions and history
- Managed structure
- Collaboration & sharing
- Workflow processing
- Governance and control
Office 365 applications

Security & Compliance

- Record management
- Data loss prevention
- Central Audit Log
- Content search
- eDiscovery
- Retention
- Disposal

Office 365 applications
Office 365 applications

- Business analytics
- Data visualisations
- Interactive dashboards
- Publishing & sharing
- Multiple data sources
- Self-service reports
The good the bad and the ugly...

**Pros**

- Constant improvements
  - updates and new apps

- Extensive suite of apps
  - for most business requirements

- Very configurable

- Mature platform
  - SQL, Exchange, SharePoint, Excel etc.

- End user familiarity

- Cloud infrastructure
### The good, the bad, and the ugly...

#### Pros
- Constant improvements updates and new apps
- Extensive suite of apps for most business requirements
- Very configurable
- Mature platform SQL, Exchange, SharePoint, Excel etc.
- End user familiarity
- Cloud infrastructure

#### Cons
- Constant improvements might not like them all
- Extensive suite of apps too much choice
- Very configurable where to start...stop?
- 1st level support “triage”
- Less control
Smart Office Systems
Help maximise the return on your Office 365 investment with…

- pre-configured SharePoint applications
- processing workflows
- business intelligence
- facilitated and on-line training
- ongoing support and help

“...delivering positive outcomes for our clients, so they can focus on their business ”
sharepoint applications

Out of the box
No custom code
Simple and easy to use
Mature and scalable design
Fast and effective implementation
Pre-configured for fast deployment
No added software or third-party apps required
Intranet

central homepage
simple navigation
news, events, announcements
application launchpad
promote culture and information
highlight people and events
easy to maintain
opportunities to expand
Document Management

- consistent structure
- familiar look & feel
- collaboration
- co-authoring
- security
- sharing
- document versioning
- search, refine, preview
- automated classification
- built-in record management
Controlled Documents

central repository
policies, procedures, manuals
draft & published versions
publishing approvals
automated notifications
version rollback
audit history
Once you are up and running... build on the base...
## Workflows

### Sequential
Online forms or documents are submitted for approval and processing
Process steps are completed sequentially
Examples: Invoice approvals, Leave request

### Parallel
Online forms or documents are submitted for approval and processing
Multiple process steps can be completed in parallel
Example: Staff on-boarding

### Bulk Processing
Multiple items can be processed in bulk by a single operator
Examples: Leave requests, Gift register approvals

- online forms
- standard designs
- simple one step approvals
- complex multiple contributor
- automatic notifications
- process audit logging
- throughput analysis
Power BI Training
- desktop application
- web application
- reporting building introduction
- dataset connections
- publishing and sharing
- end-user training

Power BI Reports
- workflow throughput
- processing statistics
Security & Compliance

Admin Training
compliance overview
audit reports
content search
eDiscovery
data loss prevention
Training and support...
help & training centre

quick guides
reference material
regularly updated
links to Microsoft training
facilitated training
self paced refresher training
learning assessments
proactive go-live support
online support

Creating a new request
Click + New to create a new request.
After submitting a request you will receive a confirmation email and someone will contact you to provide support.

If you want to add a Screenshot
Use the Windows Snipping Tool to capture the screenshot and save it to a temporary location on your computer.
On the new request form, click on Attach File and browse to the saved screenshot.

My Support Requests

- Request Details
- Modified
- Attachments

Request Status: Active (2)
1. Please add a new library on the finance site
   - A few seconds ago
2. Please add cbrown@peanuts.com.au to the Controlled Document application
   - About a minute ago

online support requests
active request status
view previous requests
closed request notifications
criteria for success

☑ Executive and management commitment and support
☑ Ability to affect change throughout the organisation
☑ Facility to train groups of end-users
☑ Organisational mandate for improvement
☑ Business champions at all levels
☑ Business quality IT environment
☑ Effective and reliable IT service provider
Immediate benefits

Positive predictable outcomes from an effective deployment

- Coordinated organisation wide focus on implementation
- Access the latest Office 365 features and functionality
- Align information management and business processes
- Start improving business performance and efficiency
checkout our website for more information

www.sos365.com.au
City of Nedlands
Scope, challenges, benefits
www.sos365.com.au
About us...

City of Nedlands
local government council
western suburbs
~22,000 population
~140 staff
~$30M budget
Document & record management
Manage all content directly on SharePoint
From creation to disposal

New modern intranet
News and announcements
Application quick links
Events and new staff

Controlled documents
Policies & procedures
Document templates
OSH material
Reduce reliance on legacy ERP
- Authority
- Limited reporting
- Expensive to maintain

Migration to SharePoint-online
- Shared drives
- On-premises SharePoint
- Staff’s desktops

Reduce paper
- Inbound mail scanned
- Internal forms replaced online
- Less printing - share and view online instead

Training and upskilling staff
- Internal IT team
- Business users
Business Process Improvement Scope

**Improved projects management**
Technical services, parks & reserves etc

**Improve process workflows**
Leave requests
Invoice processing
Contact management
Enquiries and complaints
Building and development applications
Pool inspections

**Business intelligence reporting**
Power BI reports and dashboards
Publish and share internally
Connect to multiple data sources
Automatic daily updates
Constant improvement

- Structure & governance
- Training & Compliance
- Online forms & workflows
- Process improvement
- Business Intelligence

5 of 7
Challenges

Change management
  Generational habits
  Attitude adjustments

Maintaining momentum
  Audit for correct user practices
  Refresher training
  New starter training

Whole of organisation education
  Lunch and learn
  Logon reminders
  Come and ask us anything
  IM month - awareness campaign
Benefits

Improved compliance and governance
Easy workflow processing and notifications
Greater visibility of business processes
Improved productivity
Online forms
Less paper
Easy to search
Remote access
Councillor access
Audits and eDiscovery
FOI and subpoena response capability
Flexibility to change and adapt
Less reliance on legacy systems (Trim, Authority, shared drives)
City of Nedlands

Implementation, governance and IM
The Journey

Before
- TRIM
- Network folders
- SharePoint on-premise – third party applications
- Authority
- Intramaps
- Paper – lots and lots

After
- Office 365 & SharePoint online
- Change in Information Management processes
- Authority
- Intramaps
- Automated/streamlined processes - less paper
Change Management

Executive buy-in

Staff engagement

Identify Business Champions

Communication
  - Information presentations
  - Intranet news
  - Team meetings
Removing Silo’s

Duplication

Information everywhere with poor structure

Multiple systems managing similar content

Staff chasing each other for information

Limited visibility

Inefficient
Encourage Collaboration

Improved consistent structure

Staff engaging in the processes together

More efficient processes
(online forms & approvals)

Better customer service response times
Improved Information Architecture

Mapped Keywords for Council to suit business language

Documents automatically inheriting classification

Make it simple for staff to use

Staff shouldn’t have to think!!!
Compliance
Governance

Open and transparent security model

Encouraging collaboration

Global content search

Audit log reports

eDiscovery
The RM/IM Shift

Be smart with the way the Governance is applied

Let end user’s think they have control

Allow staff to manage their own content

Focus on auditing and training

Adapt, learn and “get on board”

See it as an opportunity!!
Power BI

Real life examples
Business intelligence like never before

Go from data to insights in minutes.
Any data, any way, anywhere. And all in one view.

START FREE >

Gartner recognizes Microsoft as a Leader in the Analytics and Business Intelligence Platforms Magic Quadrant for the twelfth consecutive year.

READ REPORT >
Business Intelligence

Technology-driven process for analysing data and presenting actionable information to help executives, managers and other key stakeholders make informed business decisions.

Requires collaboration from people with business knowledge, data analysis skills and technical expertise.
certified data sources
publishing and sharing
desktop, web, mobile
automatic data refresh
security and access controls
connect to multiple data sources...
Get data...
City of Nedlands examples

Transition to data driven processing and Business Intelligence
pool register & inspections
all properties with a pool/spa
new, existing and modified pools
4-year inspection cycle
~2,800 pools
~700 inspections/year
the traditional approach...
Old paper form in triplicate book

hand-written inspection report
scanned and filed
handed or mailed to occupier
data manually entered in a register

double handling
not all details captured
risk of lost forms / keying errors
document & data separated
manually created relationship
difficult to reconcile

scanned documents filed in folder

Property Folder

Inspection report-1
Inspection report-2
manual reporting
timing delays
no audit trail
lack of accountability
let’s try that again with SharePoint...
pool inspections

SharePoint library
Remote access
pool inspection library

document set per inspection

inspection data captured within each document set
pool inspection library

inspection documents stored within each document set

data and documents in context

audit trail and version history

automatic retention and disposal
Power BI reporting
pool inspection status

inspection status
number of visits
inspection schedule
property locations
pool inspections report

- Interactive visuals
- Dynamic interactions
- Filter and sort
selected status cascades to other visuals
**Pool Inspection Library**

Drill through visuals and display underlying data.
pool inspection library

data details displayed

Click to view record details
Development Applications
Building and planning approvals
New, modification, demolition
building applications

SharePoint library
Remote access
building inspections

Document set per application
Data and documents captured in each document set
Power BI reporting
Make your business smarter today

Come and talk to us after the event

Click the contact link on www.sos365.com.au

Give us a call

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