

Implementing SharePoint

- A Case Study on tailoring SharePoint to meet agency recordkeeping needs

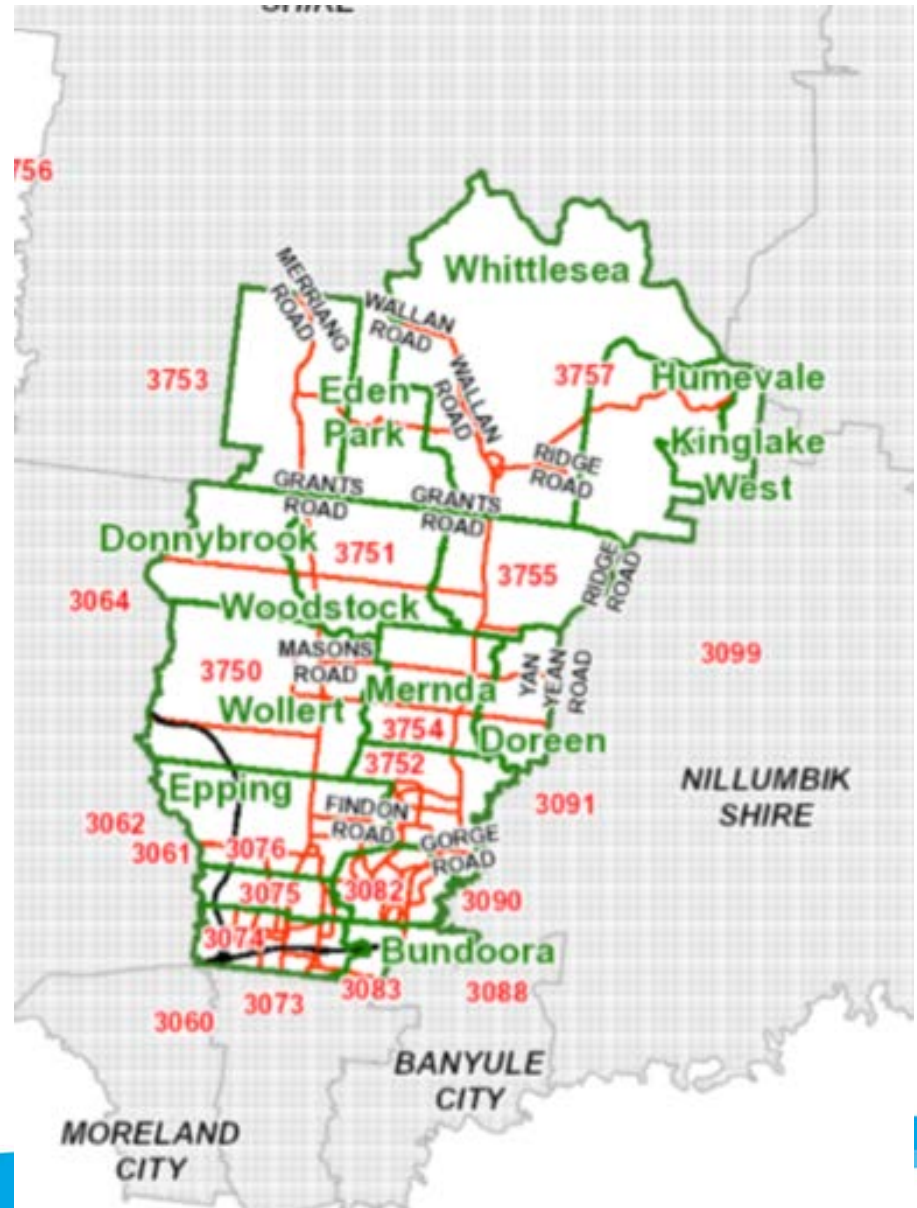
Mary Ann Rosenthal

Team Leader

Information Management

Whittlesea

- Growing
 - 2007 population 133,000
 - 2017 population 216,000
 - 2028 estimated 300,000
- Outer metropolitan
 - New Urban areas
 - Large farming/rural community
 - Change is constant



This is 2008-2009



This is now

The screenshot displays a GIS application window titled "WIGIS LIVE - Internet Explorer". The main map area shows a grid of land parcels in Whittlesea, with various suburbs labeled: Beveridge, Edén Park, Woodstock, Donnybrook, Wollert, Mernda, Epping, Mill Park, Lalor, Thomastown, and Bundoora. The map is overlaid with a grid and colored lines representing roads and boundaries. A scale bar at the bottom left indicates a scale of 1:161,574, with a distance of 6 km. The bottom right corner shows a scale of 312394.02481, 5859064.66719. The application interface includes a "Quick Search" field, an "Active Entity" dropdown set to "Property", and a "Layers" panel on the right. The "Layers" panel lists various data layers, including Selection, Property Info, Parcel Info, Proposed Parcels, Property Related, Easement, Roads, Administration, Art & Cultural heritage, Boundaries, Building Services, Census, Contours, Emergency Management, Environmental, Facilities Management, Facilities & Services, Hydrography, Infrastructure, Infrastructure Maintenance, Land Management, and Parks and Gardens assets. An inset window in the bottom right corner shows a detailed floor plan of a building, with rooms labeled: UTILITY, KITCHEN, BATH, BED, LIVING, and OFFICE. The floor plan includes furniture such as tables, chairs, a sofa, and a bed. The inset window also has a "Legend" and "Print Maps/Reports" button.

Why SharePoint?

- Failed attempts x2
- No money for record keeping
- SP was free with MS enterprise suite
- Better to something than do nothing



Vision for Information Management @Whittlesea

The Dream :

One place to manage **documents**

The Reality:

Never going to be one place to manage **documents**; never going to be one place to manage **information**



Information Systems@Whittlesea

- Assetic (Assets)
- Authority (Finance/Property/Rates/Clients)
- CDIS (Clients)
- Health (Food premises, hairdressers, tattooists, etc)
- HRIS (Staff)
- InfoCouncil (Council & ELT meeting management)
- Magiq (Finance, Business Planning Reporting, New Works)
- My Aged Care (Clients)



civica



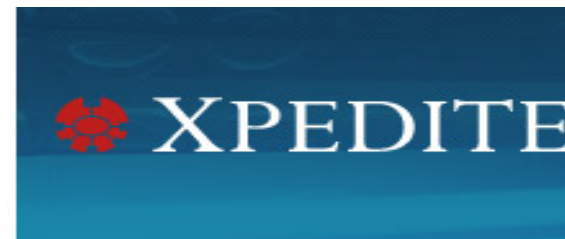
Information Systems @ Whittlesea

- **Network drives**
- **Paper files & archive boxes**
- Open Windows (Procurement)
- **Outlook (Email)**
- **SharePoint**
- SmartyGrants (Grant applications)
- WiGIS (GIS)
- Xpedite (Client Management)



SmartyGrants

Software & data science for revolutionary grantmakers



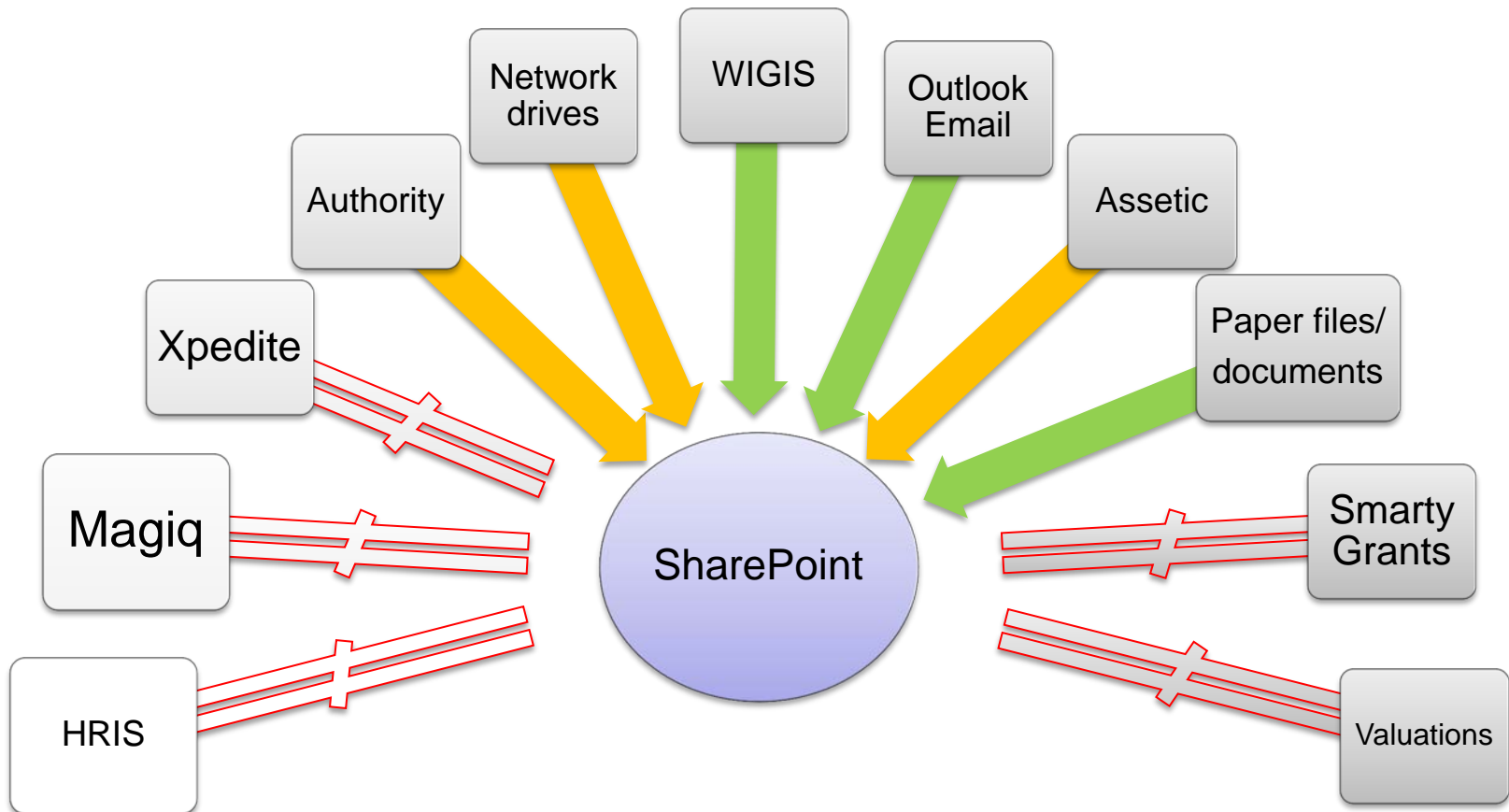
There maybe others...

- *And now Office 365*



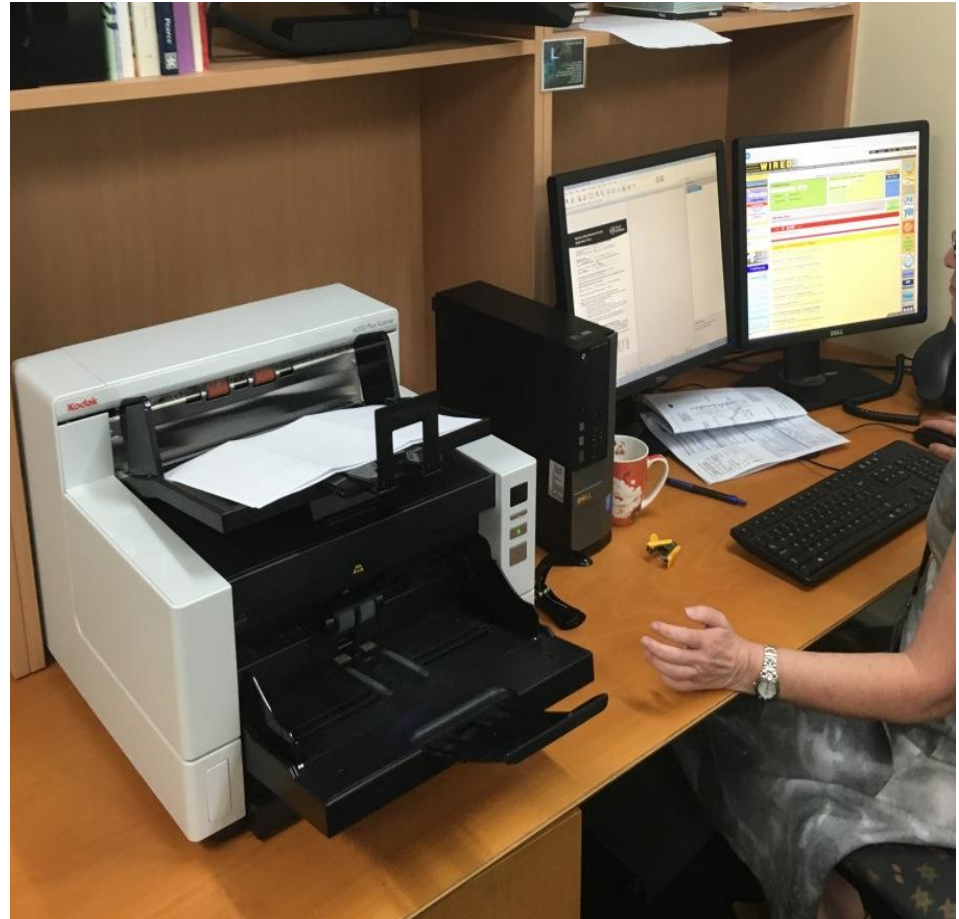
Vision for SharePoint

We have Information Systems that interact with SP, documents managed in SP



IM Implementation Principles

- Work digitally
- Share information
- Information is valuable
- Take responsibility
- Manage significant corporate information
- Make a difference
- Do no harm



What we won't do

- Increase workload
- No ownership of information
- Damage information
- Isolate information
- Customise SP
- Duplicate the network drives

If there is no value or benefit in moving documents into SharePoint then we won't do it.

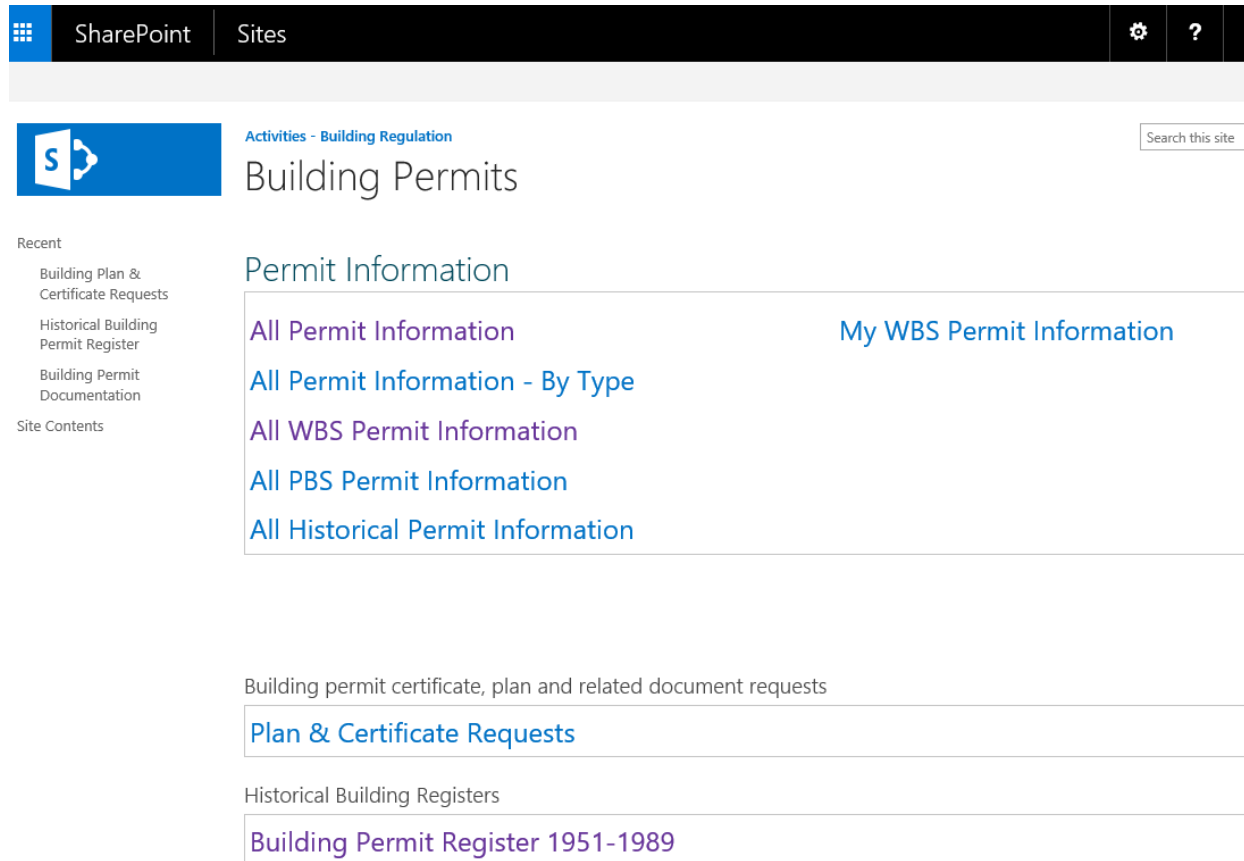


Implementation

- Focus on Problem areas
 - Building Applications
 - Planning Applications
 - MCH Clients



Building Permits & other stuff



The screenshot shows a SharePoint site interface. At the top, there is a navigation bar with 'SharePoint' and 'Sites' on the left, and settings, help, and user profile icons on the right. Below the navigation bar, the site title 'Building Permits' is displayed next to a search box labeled 'Search this site'. A left-hand navigation pane lists 'Recent' items: 'Building Plan & Certificate Requests', 'Historical Building Permit Register', 'Building Permit Documentation', and 'Site Contents'. The main content area is titled 'Permit Information' and contains several links: 'All Permit Information', 'My WBS Permit Information', 'All Permit Information - By Type', 'All WBS Permit Information', 'All PBS Permit Information', and 'All Historical Permit Information'. Below this, there are two sections: 'Building permit certificate, plan and related document requests' with a link to 'Plan & Certificate Requests', and 'Historical Building Registers' with a link to 'Building Permit Register 1951-1989'.

SharePoint | Sites

Activities - Building Regulation

Search this site

Building Permits

Recent

- Building Plan & Certificate Requests
- Historical Building Permit Register
- Building Permit Documentation
- Site Contents

Permit Information

- All Permit Information
- My WBS Permit Information
- All Permit Information - By Type
- All WBS Permit Information
- All PBS Permit Information
- All Historical Permit Information

Building permit certificate, plan and related document requests

- Plan & Certificate Requests

Historical Building Registers

- Building Permit Register 1951-1989



Activities - Planning Regulation

Search this site

Planning Applications

Recent

- Planning Register
- Pre-Application Documentation
- Pre-Application Calendar
- VCAT Decisions
- VCAT Calendar
- Site Contents

My Application Information

[My Open Applications](#)

[My Undefined Documents](#)

[My Closed Applications](#)

Standard Application Information

[All Applications](#)

[Unallocated Applications](#)

[All Open Applications](#)

[Unregistered Applications](#)

Referral Information

[Referrals Main Page](#)

[My Active Referrals](#)

Other Information

[Procedures](#)

[VCAT](#)

[Planning Register](#)

[Pre-App Information - DO NOT USE](#)

[Consolidated Reports](#)



Activities - Planning Regulation

Applications

Search this site

Recent

- Planning Register
- Pre-Application Documentation
- Pre-Application Calendar
- VCAT Decisions
- VCAT Calendar

Key Filters

Apply Clear

Content Type

Part Type

Set Type

Street

Suburb

Responsible Officer

Created

New Upload Sync Share More

All Documents Statistics New Document Sets - Last 7 Days

Find a file

✓	Name	Application No	Part No	Part Type	Set No	Set Type	Parcel No	Street/Lot No	Street	Suburb	Closed?	Ghost?
	50A Woods Road DOREEN 20190321	...		Original Planning Application		Conditional Submission		50A	Woods Road	Doreen	No	No
	254 Fifth Avenue Eden Park 20160706	...	1	Original Planning Application	1	SP2010 Documents	368740	254	Fifth Avenue	Eden Park	Yes	No
	145A Gateway Boulevard Epping (718402) 20190328	...	145A Gateway Boulevard Epping (718402) 20190328	Original Planning Application		Application Documents	539656	145A	Gateway Boulevard	Epping	No	No
	145A Gateway Boulevard Epping (718403) 20190328	...	145A Gateway Boulevard Epping (718403) 20190328	Original Planning Application	1	Application Documents		145A	Gateway Boulevard	Epping	No	No
	145A Gateway Boulevard Epping (718404) 20190328	...	145A Gateway Boulevard Epping (718404) 20190328	Original Planning Application	1	Application Documents	539656	145A	Gateway Boulevard	Epping	No	No

RecordKeeping

Is using SharePoint recordkeeping?

- It is document management
- It is information management

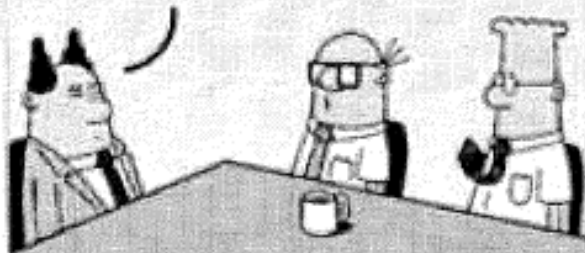
Does it do the 'standard' record keeping?

- Using add ons



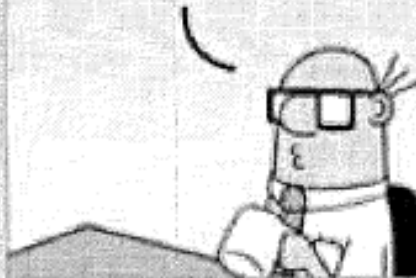
Acceptance?

WE SPENT \$500K ON
SHAREPOINT AND PEOPLE
STILL AREN'T
COLLABORATING



Dilbert characters Scott Adams Inc.

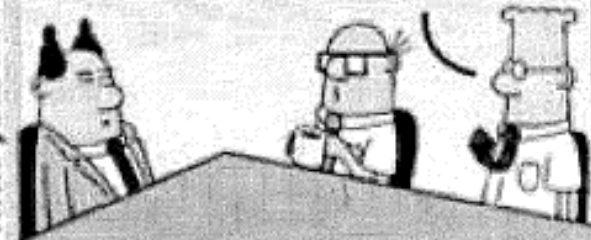
I COLLABORATED FIVE
TIMES THIS WEEK,
TWICE BEFORE COMING
TO THIS MEETING



Write your own at <http://dilbert.com>

WHAT ARE THE ODDS THAT
HE EVEN UNDERSTANDS WHAT
COLLABORATION MEANS?

ROUGHLY EQUAL TO THE
POSSIBILITY YOU KNOW
WHAT SHAREPOINT IS...



Attitudes

Info Type	Users
Activities <ul style="list-style-type: none">• Planning, Building, MCH Clients	Good response
Projects	Mediocre
Common administrative functions	Poor



Success

- Where the activity is structured
- Where people know their work
- Where the activity is document intensive
- Controlled environment



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Failures

- Too many 'experts' with no understanding
- No one takes responsibility for information
- No control



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And now to Office 365

Office 365 🔔 ⚙️

Apps

[Install Office](#) ▾

Outlook OneDrive Word Excel PowerPoint OneNote SharePoint Teams Yammer Dynamics 365

Flow

[Explore all your apps](#) →

Documents

[Upload and open...](#) [New](#) ▾

Recommended

Malcolm Glover shared this wit...
Thu at 4:14 PM

You recently opened this
Tue at 5:46 PM

You recently opened this
Tue at 5:45 PM

You recently opened this
Tue at 5:43 PM

DDIStandards
whittlesea-my.sharepoint...

Help_19_41_5003_0
whittlesea-my.sharepoint...

Telephone Hotlines
whittlesea.sharepoint.com

Intranet-Design-Annual-Interact-S...
whittlesea.sharepoint.com

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THE PERIODIC TABLE OF Office 365

2017

App availability depends on license type

Provided services include: Office 365 Groups • Enterprise Search • Microsoft Graph • MyAnalytics • Security & Compliance • Plus More

	Dynamics 365 CRM & ERP [Salesforce]					Sway Next-gen presentations			PRESENTATIONS
ENTERPRISE VIDEO	Stream Video portal [YouTube]	Video <i>Deprecating</i> Superseded by & migrating to Stream	EMPLOYEE PROFILES	Word Online Word processing in the browser	Excel Online Spreadsheets in the browser	OneNote Online Note taking in the browser [Evernote]	PowerPoint Online Presentations in the browser	OFFICE ONLINE	
FILE STORAGE & COLLABORATION	SharePoint Online Team file sharing & storage	OneDrive for Business Personal file storage [Dropbox]	Delve Employee profile & content discovery	FORMS	Forms <i>Preview</i> Code-free forms	PowerApps Code-free mobile apps (& forms)	Flow Code-free workflows [IFTTT]	Power BI Business analytics & dashboards	BUSINESS APPLICATION PLATFORM
OUTLOOK	Mail Outlook email	Calendar Outlook calendar	People Outlook contact list	Tasks Outlook tasks	TASK MANAGEMENT	To-Do <i>Preview</i> To-do list for life & work [Wunderlist]	Planner Everyday project management [Trello]	Project Online Premium project management	PROJECT MANAGEMENT
CHAT & CONFERENCING	Skype for Business Instant messaging & video chat [Skype]	Teams Group chat & video chat [Slack]	Newsfeed SharePoint's (lite) social network	Yammer Social network [Facebook]	SOCIAL NETWORKING	Visio Online Diagramming in the browser	Bookings Customer self-reservations	StaffHub Frontline employee hub & scheduler	SMALL BUSINESS APPLICATIONS
DIRECT COMMUNICATION									

*Items in [brackets] identify software with similar functionality for the sake of context

THE PERIODIC TABLE OF Office 365

2019

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DIRECT COMMUNICATION									

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Whats the best we can do ?

- If it uses document libraries – its in SharePoint – its managed - Teams
- Know that it exists – OneDrive
- Share information & understanding about better use for O365 tools
- Developing rules about use



Business rules

- Use what's available – don't go outside
 - So Communications Team are now using **Stream** instead of **YouTUBE / Vimeo**
 - Data Analytics use **Power BI**
 - **Teams** rather than Trello
- Manage it where we can
- Let go where we can't



Manage what we can

- Activities – our bread & butter
 - Building applications, Planning applications, Council minutes, Annual report, other significant documents
- Collaborations
 - Encourage use of Teams – control set up
 - Documents stored in SP



Records in the cloud



- Digital Archive
 - Manage our paper records
 - SharePoint records
 - Teams' records
 - OneDrive – not yet – like email



Let go of what we can't manage

- Personal space – OneDrive
- Digital Notes – OneNote
- Email – encourage Teams – reduce email traffic
- Wait until software becomes available that will allow the management of these things as a 'blob'



Where do we want to be?

A work environment in which:

- Documents are *easy to store and retrieve*
- Use *digital* methods of storage as opposed to paper
- *Share* information between departments
- *Consistency* in managing documents
- Meet *legislative obligations and business needs*



Questions

