

# The Way We Work Programme – Full Business Case for the implementation of Microsoft SharePoint, Electronic Document Management System (EDMS).

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## 2 Executive Summary

### 2.1 Background – The Move to Colindale

Because of the impending move to Colindale in 2018/2019, the Council is committed to providing its staff, Members and partners with a flexible, collaborative working environment in line with modern government working practices. Collaboration is a central theme that runs right through the Council's corporate plan. Collaboration between officers, Members and partners is the foundation stone to lead collaboration across the public sector and by doing so helping us to achieve our ambitions and aims for service improvement and cost savings.

One key aspect of the Council's corporate plan is the development of the new building in Colindale which will realise significant cost savings and support the Council's commitment towards the regeneration of the borough, and the Colindale area. The Council has already started to "invest in new IT to enable staff to work more flexibly across a range of locations; allowing them to be closer to the residents they with"<sup>1</sup>.

The 'Way We Work' (TW3) Programme has been set up to deliver these commitments with a vision to "work with our partners in the heart of our communities to serve residents and support our Members and staff" It is focused on these key objectives:

- To develop flexible and attractive accommodation that enables staff to work where they are best placed to do their job effectively;
- To ensure staff and Members have the right tools to work effectively in and out of the office;
- To develop a fully flexible, empowered and agile workforce, that is better able to meet the needs of our customers; and
- To streamline our processes to maximise agile working benefits.

Staff moves into new office accommodation at Colindale are on schedule for 2018/19 and the TW3 programme includes several technical enablers that are currently being implemented prior to the moves which will ensure that staff and Members are able to work effectively from different locations in line with the Councils locality strategy<sup>2</sup>.

#### **SharePoint, Electronic Document Management System Pilot (EDMS)**

In February 2017 funding was approved to the value of £250,000 by the Policy & Resources Committee (P&R) to conduct an Electronic Document Management System (EDMS) Pilot that would run for a period of four months<sup>3</sup>.

The objective of running a small-scale pilot as opposed to proceeding directly to a full roll out was to prove the concept of the proposed technical solution and identify any deficiencies or risks

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<sup>1</sup> London Borough of Barnet, Corporate Plan 2015-2020, p9

<sup>2</sup> London Borough of Barnet, Locality Strategy

<http://barnet.moderngov.co.uk/documents/s33204/ARG%20committee%20report%20-%20Locality%20Strategy.pdf>

<sup>3</sup> London Borough of Barnet, Policy and Resources Committee, 23 February 2017

<http://barnet.moderngov.co.uk/ieListDocuments.aspx?CId=692&MId=8733&Ver=4>

prior to committing significant costs and resources to a full implementation.

The pilot consisted of 5 teams which were as follows: Information Management, Adults Care Quality, Adults Business Improvement, Special Educational Needs, Communications and Governance, with circa 103 people participating.

### **Definition of SharePoint EDMS**

Document management software provides solutions for data processing, maintenance of document integrity throughout the entire information lifecycle, deletion of multiple versions, access management, quick retrieval process, document retention, maintaining complex repositories, indexing and annotation of documents. Essential features of document management software include compatibility, scalability, ease of use, communication, versioning, mobile device integration, backup, sharing and collaboration and security.

Currently documents are stored on shared drives and various repositories and are not effectively managed or shared between teams and partners apart from the five teams who participated on the pilot. The typical type of issues that staff are likely to deal with everyday are:

- The need to search across numerous repositories;
- Difficulties in searching for information due to lack of standardised naming conventions and structured file plans;
- Difficulties in sharing and working on documents with different team's due to working in different repositories;
- Lack of version control leads to multiple versions and no 'true' record;
- No audit trail of who worked on the document or amendments made;
- Project Management
- Duplicate copies of the same version including multiple drafts;

In figure 1. below are several key benefits already being utilised using SharePoint that remove some of the issues outlined above.

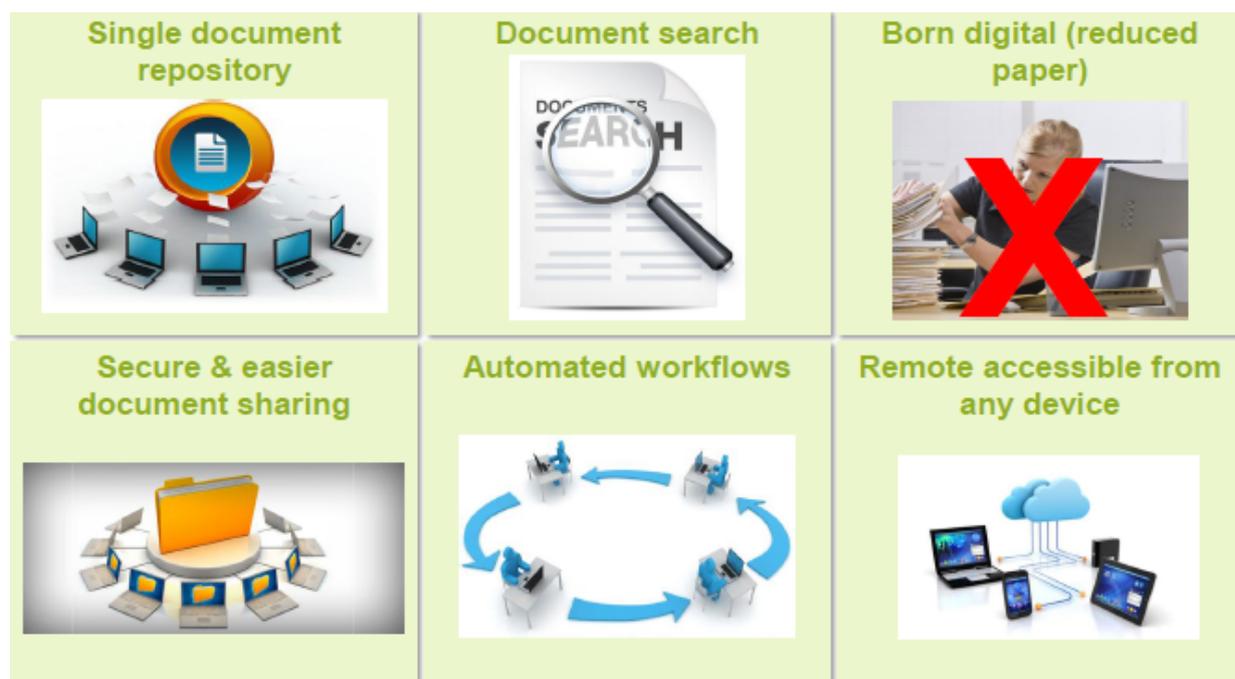


Figure 1. Key business benefits

The Information Management Team has been restructured to focus on the introduction and ongoing use of SharePoint, consequently, on a day to day operational basis the administration of SharePoint will be one of the core responsibilities of the Records Management function.

The Records Manager will have full responsibility for the system from an administrative perspective. Some of which will encompass the production of management information, monitor compliance against the corporate retention schedules, identify user training weaknesses, including monitoring of user adoption and overall governance of the platform.

### EDMS Procurement Exercise – for the pilot

The procurement exercise took place between June – August 2017 and was managed by the Council’s IT business partner Customer Support Group (CSG) using Schedule 15 of the CSG contract. CSG also procured the technical solution as it needed to be closely aligned to the Council’s overall IT architecture which is also managed by CSG IT.

There were four potential bidders invited to tender for the technical solution and their products were as follows: Microsoft SharePoint, Alfresco, Objective and Box for Business. Microsoft SharePoint, Alfresco and Objective were shortlisted and therefore continued through to the next stage of the procurement process.

Following a thorough adjudication process Microsoft SharePoint was selected as the Council’s EDMS platform. This decision was not solely based on costs, it was also based on SharePoint being a recognised market leader for collaboration and sharing platforms, which is the central theme running right through the Council’s corporate plan. SharePoint delivers content services

as the foundational content for Office 365, which is also another technical enabler that is currently being implemented across the Council. Selecting SharePoint allows us to save money through the Council's investment in the O365 platform as SharePoint online (SPO) is a core part of the Office 365 suite of products. Furthermore, SharePoint has become the standard EDMS tool for organisations such as central government, local authorities and NHS Trusts and many private sector organisations as an integrated collaborative tool and included in Microsoft licensing. Councils who have implemented (or who are currently implementing) SharePoint for document management to date are: London Borough of Camden, London Borough of Merton, London Borough of Bromley, London Borough of Enfield, London Borough of Islington, Thurrock Council, Woking Borough Council, Oxfordshire County Council, Somerset County Council, Cumbria Council, Cheshire East Council, Flintshire CBC, Gwynedd CBC, Cardiff City Council, Scottish Borders Council, City of Edinburgh Council, Christchurch & East Dorset Councils, Test Valley Borough Council and Winchester City Council as well as Parliamentary Digital Services.

The technical environment we currently work in has improved significantly with the corporate roll out of O365, regarding improved telephony, the use of Skype for Business, Presence and Instant messenger. Despite this new technology and without a corporate EDMS the technology can only be improved to a small degree. The time spent by staff searching shared drives or to retrieve information in paper format from our off - site storage incurring additional costs year on year will remain indefinitely if the Council do not invest in a corporate EDMS – SharePoint online. Productivity and efficiency will not be achieved if this investment is not approved.

The cost of the pilot which concluded at the end of April 2018 came £4,000 under budget. The teams participating on the pilot, except for the Governance team have benefited from SharePoint by saving considerable time when searching for information and being able to share and collaborate on documents to great effect. Although Governance may not have benefited from SharePoint as much as it was first anticipated the SharePoint project team are continuing to work very closely with the team, including Modern Gov. (Modern Gov is a portal that most of the Governance team work in). The end goal is to link Modern Gov to SharePoint to enhance their current working practises and to also ensure they get the best possible use out of SharePoint.

### **EDMS procurement exercise – post-pilot**

The outcome of the pilot indicates that SharePoint is the right product for the Council. Consequently, this business case requests funding (as laid out below) for the next stage of an incremental roll-out. A further tender exercise is not required, as CSG support will continue to be utilised (under schedule 15 of the CSG contract) and the necessary Records Management support to implement the product will be supplied through the Council's Information Management Team.

### **EDMS Pilot Survey**

An EDMS survey was conducted at the end of the pilot. In summary, the objective of the survey was to assess the impact of SharePoint on End Users. There were many questions and some

extremely valuable learning from the survey which has helped shape our implementation plan. An example extracted from the survey in figure 2 illustrated below suggests overall that the filing structure has improved making it easier for people to search and file in a more efficient way.

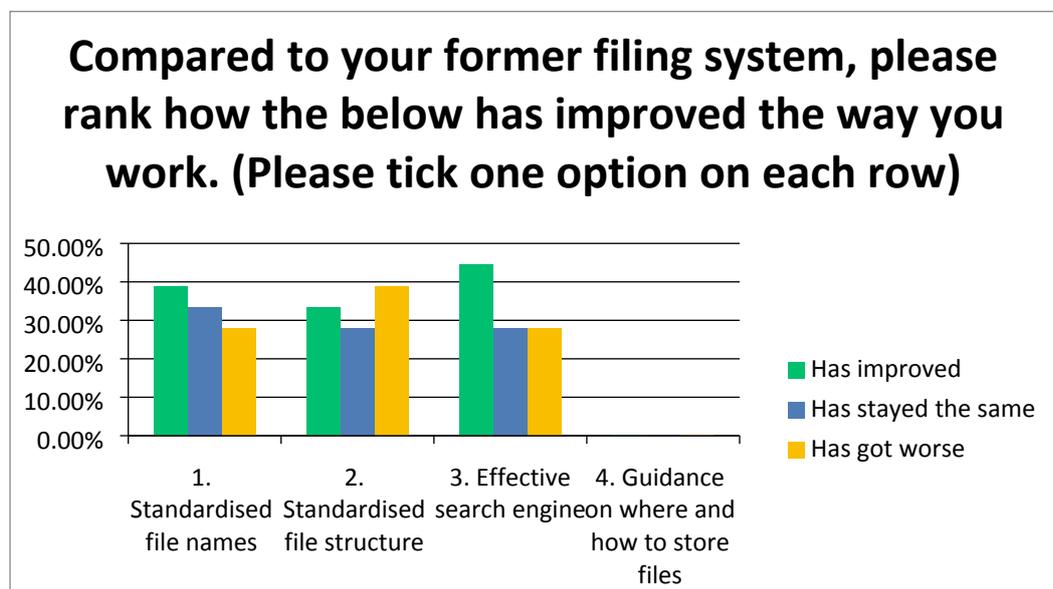


Figure 2 File System Improvements

A learning point from the above relating to the second bar cluster in the diagram above is that the pilot users felt that the file plan was too complex to navigate. We have since used their feedback to ensure for the full implementation the file plan is improved for ease of use. This demonstrates the value of having a pilot and the associated feedback.

This business case discusses the options, recommendations and costs for a targeted and phased approach to implement SharePoint to approximately 1900 End Users during 2018 – 2020. It is strongly recommended that an incremental approach is adopted. This means the roll out will commence with teams that are currently working under “Document Stress” (paper heavy processes) and would, therefore, benefit from becoming an early adopter of SharePoint EDMS.

These teams are likely to be part of the first implementation tranche and would comprise of the following teams: **Family Services** - Performance Improvement and Inspection, Adoption and Post Permanence; **Adults and Communities** - Learning Disabilities; **Commissioning** – Community Safety, Chief Executive Office, Finance; and **Cambridge Education** – Educational Psychology and Specialist Inclusion Services, should funding be approved for this business case within this current financial year 2018-2019.

Through adopting an incremental approach means the roll out will scale up year on year but it also means much less of an investment is required up front in Year 1. The costs are illustrated in figure 6 of this document.

## 2.2 Options and Recommendations

The issues summarised in the section above entitled “Definition of SharePoint EDMS” describe

how staff time and effort spent searching for information could be better utilised more effectively on their core activities, and which ultimately incur unnecessary increased storage and retrieval costs year on year. Taking also into account not just the hard copy paper costs but also time spent on searching for information stored on the existing shared drives.

Following the outcome of the pilot there are four options to address this which are illustrated in Figure 3 below

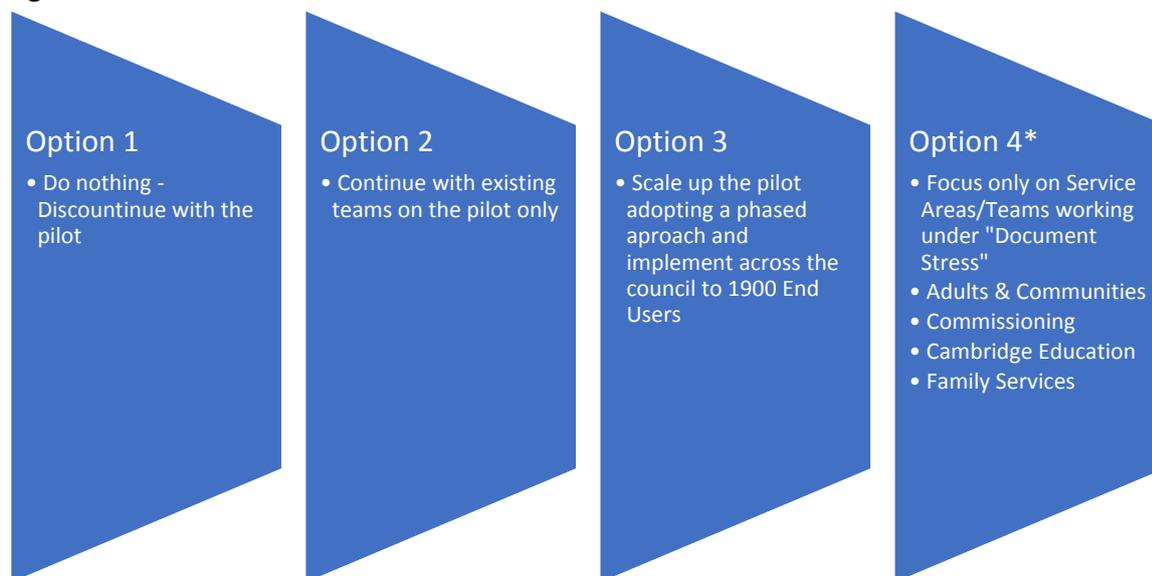


Figure 3 Options and Recommendations

To successfully achieve the desired benefits of the TW3 programme option 4\* is therefore recommended. This means we would only look to implement SharePoint EDMS to service areas where there is a "Critical" business need. This would streamline their day to day business activities by storing, managing, collaborating and sharing information more effectively with staff, Members and partners enabling them to free up time to spend on their vital areas of responsibility i.e. their core work. Providing staff with the appropriate tools to carry out their day to day business functions more effectively, providing them with access to:

- Full collaboration and information sharing across their delivery unit/service area including external partners
- Significantly improved document and information security
- Greater efficiency
- Version control
- Improved search capability
- Increased productivity

Furthermore, the SharePoint EDMS pilot identified there is not currently enough front-line benefits to roll out SharePoint EDMS to back office functions, so typically these areas such as Family Services, Social Care would be excluded until at least the assessment of phase 5 which is the "Integration of other Council systems Inc. integrating SPO with LBB intranet, Synergy, Mosaic, Electronic signatures, Shared Drive Migration".

These will all lead to greater efficiency, improved security and decreased storage costs. SharePoint functionality is all “Out of the Box” which we are not intending to extend beyond the existing pilot functionality unless there is a valid business reason to do so that would benefit the entire Council.

### 2.3 *Recommended Implementation Approach*

The recommended implementation approach for SharePoint is as follows:

**Phase 0:** A small scale pilot was conducted during Dec – April which consisted of circa 103 staff and has since concluded.

**Phases 1 – 4:** Consists of 4 tranches - Roll out SharePoint adopting an incremental approach to delivery teams currently working under document stress and then assess the delivery unit teams that were not included in tranches 1-4 and who did not initially have a requirement for SharePoint but may have later, i.e. post tranche 6 (c.300 users).

**Phase 5:** Following the roll out of the 4 tranches whereby an incremental approach will be applied phase 5 will assess the appetite for SharePoint EDMS across the remainder of the delivery units/teams.

**Phase 6:** Integration of other Council systems including integration of LBB Intranet and front-line system applications such as Mosaic, Synergy, Liquid Logic, electronic signatures and migration of the shared drives.

This business case is therefore asking for funding to implement SharePoint EDMS, adopting an incremental approach for Phases 1 - 4 within this current financial year 2018-2019. This means by adopting this approach will result in a much lesser investment for the initial outlay. It will also avoid implementing SharePoint EDMS where there is neither a business or operational requirement, moreover to delivery units providing front line services using back office systems. It also provides the project team will sufficient time to assess the business needs and appetite for delivery unit teams who may have a requirement to migrate to SharePoint later post phase 5 and the move to Colindale.

Figure 4 below illustrates a high level incremental approach.

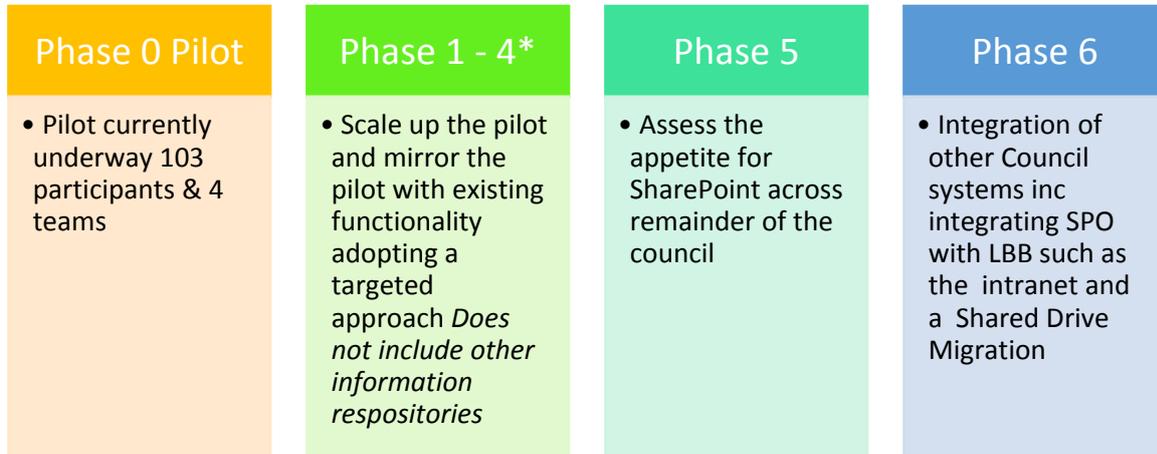


Figure 4 Phased Incremental Approaches

A high – level incremental implementation plan across 4 delivery units is illustrated below in figure 6. This considers a roll out of circa 300 staff by the end of this current financial year.

Phases 1 - 4

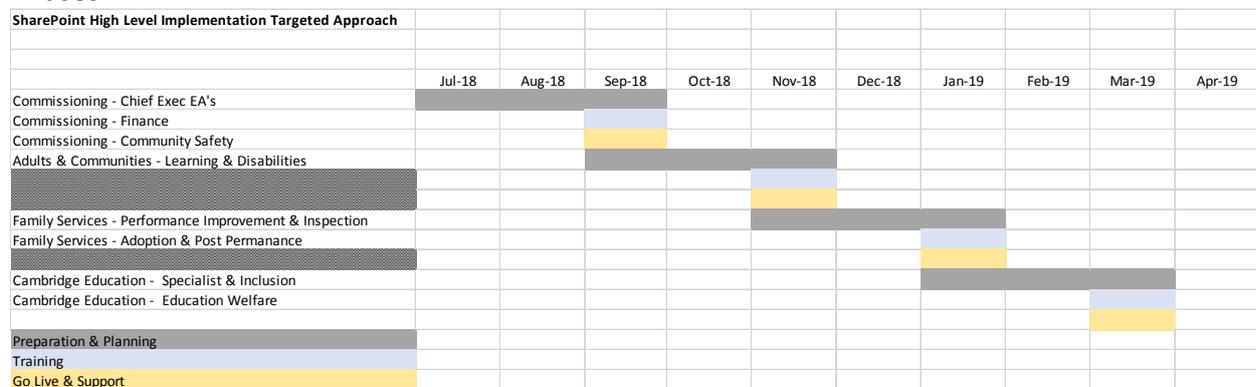


Diagram 5: High Level Incremental Implementation Approach

**Benefits**

Implementing SharePoint will enable the Council to realise the benefits and will therefore overtime touch all London Borough of Barnet (LBB) staff and partners. It will undoubtedly be a cultural change and this is something we have already started to see with the SharePoint pilot in terms of how staff can now work differently and flexibly.

Elimination of network drives, personal drives and the familiar silos of information will be changing the method of information capture and use that staff are used to. Successful delivery will ensure that LBB’s integrity and reputation is safeguarded as compliance to public accessibility legislation increases and will also include:

- The Council becoming an ‘agile working’ organisation

- Staff and Members can work in a more mobile and flexible manner and are less reliant on their offices, but remain connected with their teams and able to access the information they need to carry out their work more efficiently
- Shared drives migrated across to EDMS enable sharing and collaboration of information to be utilised to maximum potential to drive efficient consistent and reliable business processes
- Information is secure and reliable, reduces the risk of duplication and has only one version of the truth.
- Information is easily accessible and less time incurred searching for records – for business decision making, statutory compliance and legal cases
- Partnership and sharing platforms are made accessible through a variety of channels, enabling multiple objectives from the council's corporate plan
- Working in a paper-light environment will reduce cost of paper, reduce physical storage costs and improve ability to access more documents remotely and quicker
- Virtual and on-site teams will no longer hoard or rely on storing information on shared or personal drives or emailing unsecured attachments, or saving documents and records in random files on computer hard drives.
- Across the Council there are so many team members working on a variety of projects, the benefit of having SharePoint will enable them to communicate with one another in real time.

While communicating over email still serves the Council, it is important to adopt strategies and tools that allow both group communication and one-on-one conversations to function across an entire project, so they can keep track of all the data which will be stored securely and managed within one central repository.

The implementation of an EDMS is a pre-requisite for ensuring that the Colindale move is a success. Without the full suite of collaboration and smarter working tools of which SharePoint is an integral component the key benefits of the Colindale move will not be achieved. The costs below are only for an implementation of early adopters to SharePoint. We will assess the appetite for a full roll out following completion of this first phase. This is because we do not know the appetite across the Council for a full roll out at this stage it would therefore be prudent of us not to assume a full roll out is required, consequently avoiding an unnecessary capital spend when money can be better invested in the Council's front line services.

The cost to undertake this 1<sup>st</sup> phase of the SharePoint EDMS implementation for up to 300 users over a period of 12 months will not exceed a capital spend of £276,000 see figure 6 below. The revenue costs create a pressure, which can be managed through the application of retention and disposal on the council's home drives, shared drives and off-site storage of paper records. The reduction in cost this financial year will at least meet these increased revenue costs to net these off.

## SharePoint Phase Implementation

## Costs

SharePoint Phase Implementation	Costs
IT implementation costs (capital)	£153,000
Project Manager, Records Officer, SharePoint Developer (capital)	£123,000
IT support costs (revenue)	£25,000
<b>Total Phase Implementation Costs (capital)</b>	<b>£276,000</b>
<b>Total Phase Support Costs (revenue)</b>	<b>£25,000</b>

Figure 6. Implementation Costs for Option 4 – Circa 300 end users.

Phase 1 will commence in July 2018 and will be fully completed by March 2019. This business case is only asking for funding for Phase 1 which consists of circa 300 people and will be completed by the end of March 2019. Separate business cases will be developed for the additional phases as we approach them, for the remaining staff Members and partners circa 1550.

The proposed timescales for this phase are as follows:

SPO Implementation	Key Dates
Full Business Case to P&R	11th June
System Development & Testing	July - Aug
Preparation and Planning with teams	July – March 2019
Training	Sep – March 2019
Phase 1 x 4 tranches On -boarding	Sep – March 2019
Assessment of phase 5	April 2019
Lessons Learnt	April 2019
Project Closure for Phase 1	April 2019

Figure 7 High Level Phased Implementation

### 3 Introduction

- 3.1 Achieving the maximum from the modern workforce requires modern technology and support to provide an agile and flexible approach to business practise. We as a Council can make significant improvements in the way we serve our customers and residents by introducing new modern technology into the workplace to help us to achieve this. It is important that we enable staff, Members and partners to access information instantly whenever they need it and from wherever they are located, as well as recognising that staff, Members and partners need to collaborate effectively regardless of their physical proximity. The Council's vision for 2020 states that we must "reduce bureaucracy and improving efficiencies, with increased collaboration driving innovation in the way services are designed and delivered". Consequently, the provision of being able to collaborate and share information is critical for supporting the needs of our staff, Members and partners through consistent access to all the information required to support their respective operation.
- 3.2 Information is an increasingly recognised vital strategic business asset for the London Borough of Barnet (LBB) as documented in the Councils Information Management Strategy 2016-2020. Effective management and use of and re-use of information is important for supporting LBB decision making and providing and data for use by our customer and partners.
- 3.3 "Colindale offices will be our main office base, but we will be able to work in a variety of settings to be closer to the residents that they support and to work securely, safely and effectively. For many staff, this means less need to come into the office to work. Staff will be supported through better technology, training and equipment. That means whether they work from a team area, hot desk, home or in a client's home, officers will have access to the systems and information they need".
- 3.4 These objectives have been translated into the Technology Workstream of the 'Way We Work Programme and comprise of the following technical enablers; SharePoint Online (SPO), O365 (Microsoft 365) and IT Accessories. These projects feed into the wider programme which also includes the Colindale build (the build of the Councils new offices situated at Colindale and implementation of the Locality Strategy.
- 3.5 The overall objective of SharePoint is to enable smarter working within the Council in a way that encourages staff, Members and partners to engage, rather than dictates that they do so; providing a collaborative platform which will provide multiple channels of communication to be used simultaneously.
- 3.6 SharePoint will deliver significant benefits to the Council. This includes: efficient management of access to information significantly reducing administrative time spent searching for information, creating single sources of data so the Council can view information with confidence knowing that it is the latest version and that it also represents combined input and allowing more flexible working by removing the need to access physical

files. In addition, there are also benefits to residents including faster response times by the Council, any conversations with the Council will involve all the relevant information. Finally benefits to Members include access to information that is consistent and rapidly accessible and the ability to see information across their area of responsibility – all collected together in one repository.

- 3.7 The human benefits of being able to work each day, communicating collaboratively across the organisation throughout the day, searching for and sharing documents intuitively and efficiently, and interacting with staff, Members and partners in a variety of different ways should be instinctively obvious.

## 4 Background to the EDMS Pilot

- 4.1 Following the move to Colindale there will be a reduced ratio of desks to staff, which will be achievable because of changes we make to how often staff, Members and partners need to come in to the office. This means that more users will be working remotely and will require access to systems and information instantly and seamlessly. Without the right technical platforms such as O365 and SharePoint (which is also part of the O365 suite) working remotely will be somewhat extremely challenging to achieve.
- 4.2 The Council does not currently have a corporate wide EDMS solution for securely managing and sharing the information we create. However last year the Policy and Resources Committee approved funding to conduct a small scale EDMS pilot (circa 103 people). The pilot was to enable the Council to not only manage the risk of the proposed technical solution but to also identify any perceived deficiencies before committing to a significant investment by fully implementing the chosen solution. Microsoft SharePoint was selected following a procurement exercise conducted by CSG and following the technical development of the platform, UAT and Training the pilot went live in December 2017.
- 4.3 The pilot ran for a period of four months during Jan – April. By scaling up the roll out of SharePoint as the Council have done with O365 these communication, sharing and collaboration tools will contribute to a maximum return on the overall investment made to the move to Colindale. These new ways of working are all technical enablers and therefore a prerequisite for the move to Colindale at the end of this year (2018). The Council has already committed to “invest in new IT to enable staff and Members including partners to work more flexibly across a range of locations; allowing them to be closer to the residents they work with”<sup>4</sup>

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<sup>4</sup> Locality Strategy, June 2016, p4

- 4.4 Fully implementing SharePoint aligns with the corporate plan 2015-2020, including the Councils Information Management, ICT, Customer Access and Locality strategies.
- 4.5 The technical environment we currently work in has improved significantly with the corporate roll out of O365, regarding improved telephony, the use of Skype for Business, Presence and Instant messenger. Despite this new technology and without a corporate EDMS the technology can only be improved to a degree. The time spent by staff searching shared drives or to retrieve information in paper format from our off - site storage incurring additional costs year on year will remain indefinitely if the Council do not invest in a corporate EDMS – SharePoint online. Productivity and efficiency will not be achieved if this investment is not approved.

## 5 Purpose

- 5.1 The project in this business case is to procure Microsoft SharePoint as the Councils corporate EDMS platform. The previous business case was to ask for funding to conduct an EDMS pilot. Following the successful pilot which ran for 4 months and concluded in April 2018 SharePoint enables Staff, Members and partners to securely store electronic documents, enables users to share and collaborate the information the Council generate and allows them to work more flexibly. SharePoint is an industry leading platform for intranets, secure document management and collaboration.
- 5.2 All new technology involves changing the way people work and because this project forms part of the wider project “The Way We Work” it brings with it major change for all staff, Members and partners. A Change manager had been appointed to provide support to all staff both during the implementation phases. Post implementation will become the responsibility of our IT Partner Customer Support Group (CSG).
- 5.3 The Information Management Team has been restructured to focus on the introduction and on-going use of SharePoint, consequently, on a day to day operational basis the administration of SharePoint will be one of the core responsibilities of the Records Management function.
- 5.4 The Records Manager will have full responsibility for the system from an administrative perspective. Some of which will encompass the production of management information, monitor compliance against the corporate retention schedules, identify user training weaknesses, including monitoring of user adoption and overall governance of the platform.
- 5.5 Full deployment of SharePoint with the right structure, functionality, ease of search, accessibility and governance will significantly reduce the amount of administrative time staff spend searching for records, as given in diagram 17 of this document. Furthermore, because SharePoint is also part of the O365 suite currently being deployed across the Council all this technology is transforming the way staff work by enabling them to provide a more flexible and responsive service to residents.
- 5.6 SharePoint allows the production of quality information to staff, Members and partners at

the right time, in the right format and provides the platform to manage automation of business processes to establish a central, secure repository for key business information. Electronic records underpin much of the modern government agenda whereby the Council are expected to be making progress in and at the same time embracing new technologies.

- 5.7 SharePoint in the Records Management profession is known as a leading intranet and content management system that is used for internal purposes to assist with bringing an organisation together for intranets, secure document management, sharing and collaboration.
- 5.8 SharePoint if fully deployed across the Council, initially to teams working in “Document Stress” will manage all electronic documentation throughout its lifecycle from creation to secure destruction or transfer if legally required. Fundamentally SharePoint as with all other EDMS platforms is a place for evidential record of all activities, decisions, processes, procedures, operations, proper conduct, projects, rights and obligations and transactions, irrespective of whether these related to internal or external functions.
- 5.9 SharePoint was selected for the pilot and in doing so following the outcome of the pilot and the anticipated benefits achieved when it is fully implemented, this will result in our staff, Members and partners being equipped to work in a more agile, flexible, digital and secure environment. Because SharePoint is part of the O365 integration (Microsoft Suite) with the right suite of tools and collaboration platform, the overall expected business benefits will be realised.
- 5.10 SharePoint will clearly align with the Council’s values to ‘work together (as it will facilitate easier and collaborative working), be trusted (as it will enable security and compliance, and ‘embrace change and innovation’ (as it will provide a modern tool for managing Council information which will also enhance working towards ensuring digital continuity).
- 5.11 The high-level requirements that were agreed for the SharePoint EDMS pilot are illustrated in figure 8 below.

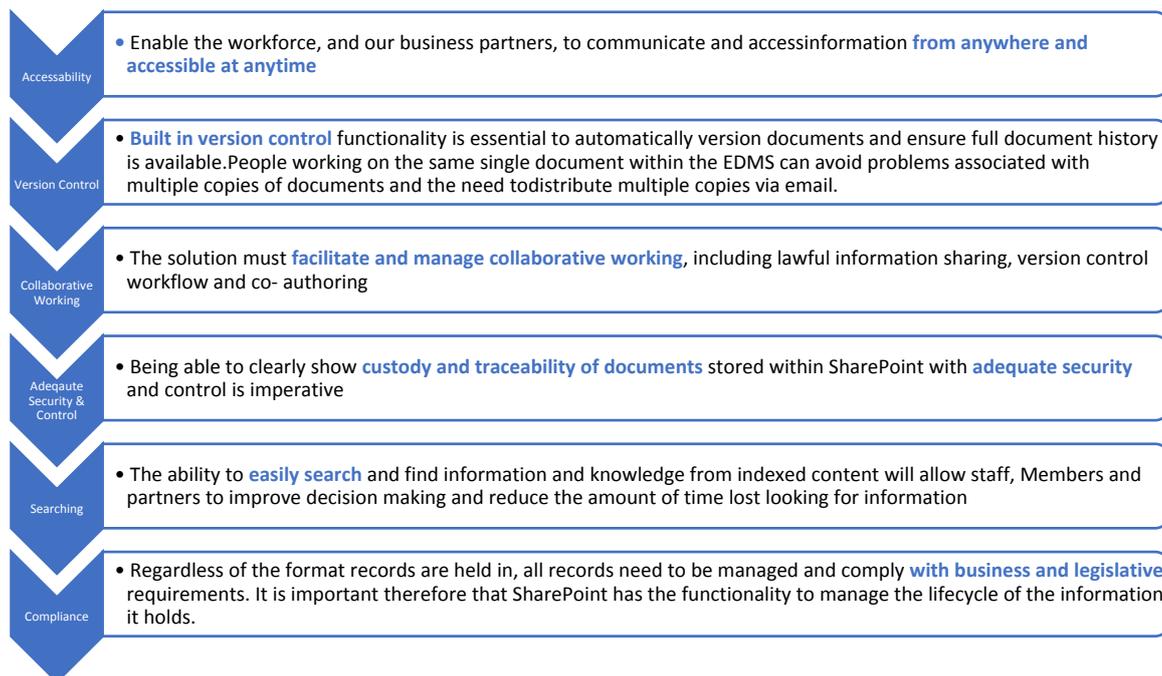


Figure 8 High Level Business Requirements

5.11 The diagram in figure 9 below illustrates the lifecycle of the information flow in SharePoint



Figure 9 Information Cycle

## 6 Aims and Objectives

6.1 Overall the TW3 Technology projects are anticipated to contribute to the medium term financial saving challenge of achieving savings of £81.1m between 2016 and 2020. SharePoint and Smarter Working tools such as O365, Skype for Business etc are essential modernisation measures and key technical enablers that will complement the drive for greater efficiency, benefit business service areas, raise standards and further improve good records management practise overall.

6.2 Figure 10 below illustrates the project outcomes that SharePoint will achieve

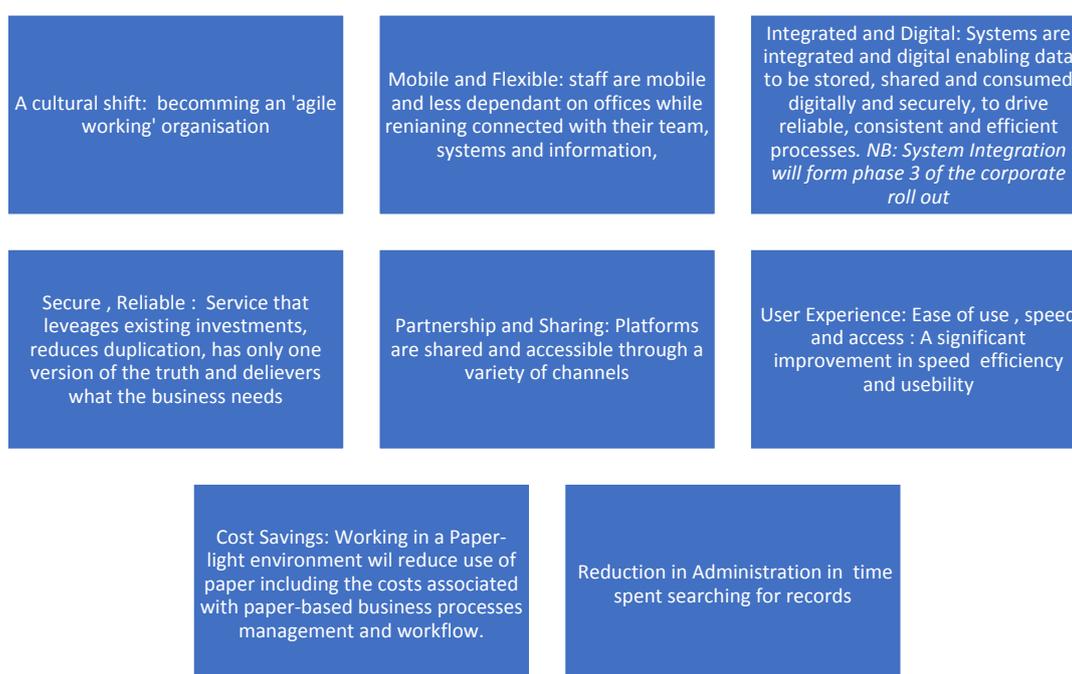


Figure 10 Project Outcomes

6.3 SharePoint and other Smarter Working tools are all sophisticated technology tools but they will not deliver business transformation programmes alone. These must be supported by a change in culture and working practises such as:

- A Flexibility First Approach” is the norm rather than the exception
- Simplified collaboration and connectivity virtually everywhere means sharing information and working with other regardless of location
- Work takes place at the most effective times, respecting the needs of the task, the customer, the individual and the team
- Managing performance focuses on results and outcomes rather than presence.

## 7 SharePoint EDMS Business Requirements

- 7.1 A business analyst was recruited in to collate the business requirements for an EDMS and to also determine user expectations for the new product. The requirements were collated in the form of a series of workshops with the respective teams that had been selected for the pilot. The requirements needed to be quantifiable, relevant and detailed.
- 7.2 The information captured was used to feed into the initial pilot business case but also formed part of the overall procurement/tender process, prior to the award of the contract to Automated Intelligence to conduct the pilot.
- 7.3 Following the business requirements workshops, the Records Manager and EDMS Project Manager conducted a series of workshops with each of the pilot teams. Line managers were asked to nominate a representative(s) from each of their teams, otherwise known as “Power Users” to help develop their file plans and to also enable Automated Intelligence to build the file plans in preparation for the pilot to go live.
- 7.4 The time taken to develop the file plans varied in terms of the number of iterations required to ensure that they were fit for purpose for the pilot. Between 3-8 iterations of the file plans were required depending on their complexity which was determined by the type of business function and activity the teams were responsible for carrying out. The file plans were therefore built on the understanding that additional rework may need to be carried out during the pilot as part of the lessons learnt process.

## 8 Pilot Scope

- 8.1 The objective of running a small-scale pilot as opposed to proceeding directly to a full role out was to prove the concept of the proposed technical solution and to also identify any perceived deficiencies and risks prior to committing significant costs and resources to a full implementation.
- 8.2 There were several factors that contributed to the delay of the pilot starting and these were fundamentally associated with O365 accounts and network/infrastructure also being a dependency on the pilot. To add to these and due to unforeseen circumstances on the implementation partner the training was disrupted and had to be re-scheduled. The pilot finally got underway in January rather than its original start date of September 2017.
- 8.3 The scope of the pilot was as follows.
- 8.4 *The goals of implementing the EDMS initially as a pilot were to:*
- Demonstrate how EDMS can successfully be used in LBB
  - Demonstrate and provide confidence that the planned business benefits identified in the pilot business case

- The pilot will enable the project to review and refine design decisions such as file plans, security permissions, site owners etc

### 8.5 Stakeholders

- Policy and Resources Committee
- Head of each pilot delivery unit
- Pilot Users
- EDMS project team
- CSG IT
- 

### 8.6 Communications

It was important to ensure the EDMS pilot communicated to the identified Stakeholders and other LBB staff. Communications were within the TW3 Communications framework. It was also equally important that the pilot was not lost in the larger scheme of things given the size of the TW3 wider programme.

The EDMS project manager was the lead for all communications relating to the EDMS pilot throughout its entire duration.

### 8.7 SharePoint Core Functionality for the Pilot Only

- 8.8 The core functionality of SharePoint EDMS that was agreed to be trialled throughout the pilot was selected from a comprehensive set of business requirements that were captured from SharePoint workshops at the beginning of the pilot. Due to budget restraints, it was not possible to incorporate the full set of business requirements into the pilot, due to time and costs therefore it was agreed the core functionality would comprise of the following for the pilot only.

#### Basic Document Management Functionality

- Adding, editing and updating documents (version control)
- Adding a document from MS Office
- Adding an email from MS Outlook
- Sharing & collaboration
- Scanning to EDMS

**NB:** Initially designing a simple workflow was also going to be included in the pilot; however, during the business requirements gathering workshops the requirement for a simple workflow to be designed had not been identified. This was removed as at the time there appeared to be no requirement to develop a workflow

#### Basic Records Management Functionality

- Setting and managing retention policies

#### System Administration

- Setting up Users (permissions, groups etc.)
- Document types, metadata design etc.
- Set up and manage file plan
- Audit Functionality

## 8.9 Teams participating on the pilot

8.10 Teams participating on the pilot consisted of a combination of teams working in a paper heavy environment or teams who expressed an interest in becoming part of the pilot. The teams, including the number of staff participating are illustrated in figure 11 below.

8.11 CSG IT Admin team took part in the pilot which enabled them to familiarise themselves with SharePoint and to also enable them to provide 1<sup>st</sup> line technical support for the implementation tranches should this business case be approved.

Team Name	Number of Participants	Date On - Boarded
Information Management Team	13	December 2017
<b>Governance</b>	<b>10</b>	<b>December 2017</b>
Special Educational Needs	28	December 2017
<b>Capita Admin</b>	<b>4</b>	<b>December 2017</b>
Adults, Care Quality & Business Improvement	29	January 2018
<b>Communications</b>	<b>19</b>	<b>January 2018</b>
<b>Total Number of Participants</b>	<b>103</b>	

Diagram 11 Pilot Teams

## 9 Training

9.1 SharePoint training was delivered by our pilot implementation partner. Prior to the “Go Live” date each team member participating on the pilot was invited to an End User classroom training session, except for the CSG IT Admin team who were required to undertake Power User and admin training. This was because they already had a high level of PC skills, whereby End User training was assessed at being too basic for a technical admin team to have to undertake.

9.2 Due to unforeseen issues arising from the O365 licenses being activated in time for the End User training sessions, (which were not realised until the day of the training and resulted in End Users not being able to activate their accounts and log into SharePoint EDMS) in addition to the login issues there was also network performance issues encountered. A decision was therefore agreed to postpone the training until Capita IT resolved the issues.

9.3 The training resumed four weeks later, which impacted on the pilot “Go Live” date. However, because a small amount of contingency had been built into the pilot at the outset this meant there was minimal risk to the outcome of the pilot.

- 9.4 When the End User training re-commenced it was with a new trainer whom the project team were unfamiliar with. By doing so a new set of issues were encountered, these were largely associated with the trainer's delivery approach. It was felt the trainer focused heavily on the technical elements of the product rather than the basic "out of the box" SharePoint functionality. The SharePoint EDMS project manager escalated the concerns which resulted in the training being postponed for a second time and a new trainer allocated.
- 9.5 A blend of training materials was used as well as a "hands on" classroom approach. These included training videos, quick reference guides and training manuals for the three different levels of training that was required, i.e. End Users learning how to use the basic functionality of SharePoint this included adding documents, creating documents, editing documents and sharing documents. Power Users are people who have additional admin rights (non-technical) who can control permission/security settings, create lists, approve items, add and customise certain pages including training new members of the team as and when they are recruited in. CSG IT Admin users are trained on providing first line technical support to all users of SharePoint.
- 9.6 The second part of the training was targeted specifically at Power Users that had been nominated by each of the team's line managers.
- 9.7 At the time this business case was authored there were 19 Power Users who were invited to undertake Power User training, including 3 CSG IT Admin staff.
- 9.8 A summary of the training schedule is illustrated in diagrams 12 – 15 below.

DECEMBER						
S	M	T	W	T	F	S
	27	28	29	30	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						
JANUARY						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	28	29	30
31						

**KEY**

- Training Delivery Days
- Xmas/ New Year break
- On-boarding/Support

Diagram 12: Scheduled Days

December 2017 - Training Dates for Pilot Teams				
	Thursday		Friday	
	14th December		15th December	
		9.30 - 12.30	13.30 - 16.30	9.30 - 12.30
	3 hours	3 hours	3 hours	3 hours
<b>IMT</b>	End Users x 8 Power Users x 6 Total - 13			
<b>SEN</b>		End Users x 12 Power Users x 2 Total - 14		End Users x 12 Power Users x 2 Total - 14
<b>Governance</b>			End Users x 8 Power Users x 2 Total - 8	

Diagram 13: Training Schedule

	Monday		Tuesday		Wednesday	
	8th January		9th January		10th January	
	9.30 - 12.30	14.00 - 16.00	9.30 - 12.30	14.00 - 16.00	9.30 - 12.30	14.00 - 17.00
	3 hours	2 hours	3 hours	2 hours	3 hours	
<b>Adults</b>	BI Team End Users x 3 Power Users x 2 Total - 5	Care Quality End Users x 13 Total - 13	Care Quality End Users x 11 Power Users x 3 Total - 14			Paul floor walking support.
<b>Communications</b>				End Users x 10 Total - 10	End Users x 7 Power Users x 3 Total - 10	

Diagram 14: Training Schedule

Go Live	Floor Walking/Drop in Sessions	Go Live	Floor Walking/Drop in Sessions
Monday 18th December	Tuesday 19th December	Monday 15th January	Tuesday 16th January
09:00 – 17:00	09:00 – 17:00	09:00 – 17:00	09:00 – 17:00

Diagram 15: Go live

- 9.9 Post the training sessions each of the delegates were invited to complete a training feedback survey. However, as with all survey's the number of respondents was significantly low compared to the number of people who attended the sessions.
- 9.10 The pilot "Go Live" took the form of two tranches as illustrated above in diagrams 12-15. Throughout the pilot an issue log was also maintained on SharePoint EDMS. This is where the pilot participants could log any issues that they encountered with the system.
- 9.11 During March and April individual feedback sessions were conducted with the pilot teams. Although the invites were open to both End Users and Power Users to attend they were largely represented by the Power Users. The sessions provided the attendees with the opportunity to discuss any issues they had encountered during the pilot that hadn't already been resolved by means of the issue log, but also to inform us about the overall End User experience, what went well, what could have gone better. Furthermore, this has also assisted the SharePoint project team regarding lessons learnt from the pilot.
- 9.12 The table below in figure 16 provides a representation of the questions and feedback that the project team asked during the sessions.

Question	Answers
<p><b>Question 1</b> - How do you feel the rollout has worked for the pilot? For example, communications, support, training</p>	<p>Lucky to have the project team in Information Management</p> <p>Training worked better in teams rather than mixed which is what happened first time round</p> <p>Assumption in training that everyone had an understanding of what they were saying</p> <p>Perhaps a rush to tick boxes in session, maybe splitting so it's not all in one session</p> <p>How we use online material - should we have pushed the videos a bit more</p> <p>Felt having to learn on the job</p> <p>Communications' were consistent</p> <p>Training was done a while before all functionality was available, had it all been launched at the same time it would have been easier</p> <p>At the moment, it has to be half and half with emails until SyncPoint, is enabled</p> <p>Pilot needs to run for longer so that we can utilise all the functionality</p> <p>FAQ's would be useful to have published</p> <p>Using 'SharePoint' for message of the day would be useful</p> <p>File plan work, some more work required, didn't know what system we were going to get when we developed this, hopefully now we know the system better we can help with this.</p> <p>It has made admin processes of scanning easier but this could be streamlined further by using Ezescan software.</p> <p>Training worked well</p> <p>Team training was good</p>
<p><b>Question 2</b> - What do you think about SharePoint</p>	<p>Search functionality could be better, would be useful to search by author, dates created.</p> <p>Documents bulking up in some areas and more</p>

	<p>metadata required</p> <p>Positive feedback on metadata - did not expect to like this but have become accustomed to it</p> <p>Saving, would be useful to be able to save directly from the application</p> <p>Recent places not building up</p> <p>Breadcrumb trail would be useful</p> <p>Found it brilliant because we can go into SharePoint and easily get whatever is required for panel packs, this is an electronic and paper pack</p> <p>Talked a bit about the new external sharing platform but this might not be of use to SEN because everything they are sharing is sensitive so currently they use encrypt and send.</p> <p>Performance is as it should be, time and practice will improve it further</p> <p>That it would be more successful and have better impact if using SharePoint was compulsory</p> <p>There needs to be more manager support and engagement, particularly from middle management.</p>
<p><b>Question 3</b> - overall what is the impact on your work? For example, what have you been able to do differently?</p>	<p>Collaborate and share - project a good case for how we can now Share and Collaborate better</p> <p>External sharing will be useful</p> <p>Some issues with Drag and Drop functionality but will be rectified by SyncPoint</p> <p>No save button is a difficult change to get used to</p> <p>Setting up specific areas of work gradually rather than on mass, ease into using SharePoint</p> <p>Haven't tried editing online but uploading, downloading has been a big improvement as this saves a lot of time, at the moment they have paper files and this makes it so much easier</p> <p>The team is very paper heavy and this is making it easier to be move to a more paper light environment</p> <p>Expressed it would be helpful to merge with Synergy as currently letters are written on Synergy and it would be useful to link these back to the SharePoint case file, at</p>

	<p>the moment it is unlikely these letters, which form part of the child's case file are being uploaded to SharePoint as well, meaning its split across 2 systems</p> <p>Prior to SharePoint this team only worked with paper files, this is the first move to using these files electronically</p> <p>Will have more of a chat about naming conventions on the folders in SharePoint as it would be useful to have the synergy number in the folder name as well as the child's name to link the file to synergy</p>
<p><b>Question 4</b> - Have you tried to scan to SharePoint - to create a readable PDF - Upload to SP PDF</p>	<p>The team had not tried scanning to SharePoint as there had not been a requirement to do so at the time the feedback sessions were held.</p> <p>Not yet but will try this as it will streamline their processes further</p>

Figure 16: Pilot Feedback Sessions

## 10 Outcome of the Pilot

### 10.1 Case Studies

- 10.2 An example of one instance regarding the time taken searching for documents on shared drives compared to the time take searching for documents stored in SharePoint during the pilot is given below. This example has been provided by Cambridge Education, Special Educational Needs team who participated on the SharePoint pilot. The graph provided below in figure 17 illustrates the average time taken to search for documents stored on SharePoint compared to searching for documents stored on the shared drive.

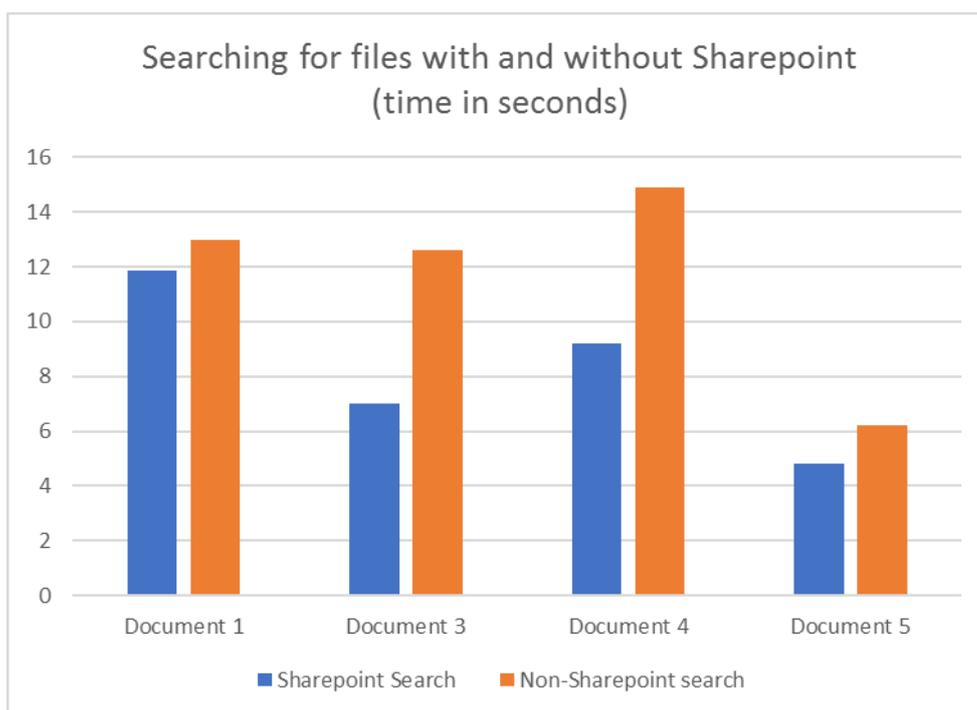


Diagram 17: Average time spent searching

## Case Study Topic: Sharing Documents for Review IMT Records Manager

### Process re SharePoint:

Before SharePoint I would draft a document and save it to the shared drive, then email this document to my manager to review and make comments. My manager would then save a new version of this document with her comments to the shared drive and name this indicating it included her comments, this would create two different documents in the shared drive.

### Process post SharePoint:

I now draft a document and save directly to SharePoint, I can then share with my manager by sending a link straight to this document. The in-built versioning process in SharePoint means that she can work making changes and reviewing this document directly onto the link I have sent her, I can then go back to the original in SharePoint to look at the comments made on the new version.

### Improvements:

It means a fewer number of documents are generated out of the process, meaning it's easier to manage.

It saves time searching for the most relevant version of the document

**Case study topic:** Collaboration – working on documents at the same time

**Process pre-SharePoint:** If Jess and I needed to work on the same document, we would need to save two versions of this to work on individually, and then one complete combine the information together. This would create two separate documents and then a completed document.

**Process post SharePoint:**

Now we're working in SharePoint, we only need one document which we can both work on at the same time. This is a function of SharePoint we use often and has really benefited the way we work.

**Improvements:**

It saves us time because we don't have to spend time combining the information we work on separately together.

It means we can work together more seamlessly as we can both keep track of areas we're working on clearly.

It means fewer numbers of documents are generated so it's easier to manage as there is only one document with versions saved to that 1 document.

**Case Study Topic: FOI Requests**

**FOI Officer:**

SharePoint makes locating, updating and sharing information easier. Using SharePoint, I am able to track changes and version control updates with colleagues within the team. Colleagues can work together in real time editing the document together to make the necessary changes, for example when compiling the Senior Commissioning Board (SCB) report. No longer are there multiple copies of different versions of the same document being sent around as attachments, links to one document in SharePoint are sent, so changes are made in one place, collaboration is auditable and documented with agreed changes locked down so all the End User of the policy will see and use is a final version of the document.

In IMT I am reviewing the Information Management Policy framework. There are a whole suite of policies, procedures and toolkits that need updating. I am now able, through the power of SharePoint, to work strategically across the Council and with our partners and contractors to build better and stronger relationships. I will need to share the policies with Information Management Governance Groups, Cambridge Education and Re and CSG for consultation and comment and this task will be made considerable easier as all I need do now is provide links, documents will be store and accessed from one place. Strong naming conventions enable users to know what the information is for. I can also restrict access to folders will policy is being formulated to only those that need to know, but then open up the policy suite once finalised to al staff.

Where I need to store documents that arise from a routine task, for example I prepare a weekly and monthly reports of FOI performance, I am able to locate the place to save the document more easily as my personal view shows the folders I regularly access. I can also allow the document to inherit metadata controls from earlier documents saving me time and make the documents easier to find for others searching SharePoint, making them accessible to all at all

times.

The benefits of SharePoint are clear less time processing administration of work, more time doing the work to build a better information management corporate asset which can be better exploited.

**Case Study Topic: Special Educational Needs**  
**Assistant Director: Access and Corporate Services**

The implementation of SharePoint is business critical for the SEN team.

In order for staff to work in an electronic environment we need SharePoint as our recognised EDMS. Without SharePoint additional storage space will be required at Colindale to store the physical paper files we currently have on site here at the North London Business Park. This is because the files are accessed daily. Files that do not require immediate access are already stored offsite however, E&S are the biggest user across the Council, of the recall service provided by Stor A File the offsite storage provider.

E&S staff are currently benefiting from the SharePoint pilot by being able to work remotely and from home. Should a full roll out not go ahead, many E&S staff would need to work from the Colindale office on most days.

Without SharePoint, the physical files would need to be access controlled as the proposed location in Colindale is in the basement boiler room, the person with access control would need to be someone in the team.

## 11 Options, Recommendation and Rationale

11.1 The options for consideration are illustrated in figure 18 below. The recommended option is Option 4 which focuses only on service areas and their respective teams that are currently working under document stress, these are Adults & Communities, Commissioning, Cambridge Education and Family Services. The overall number of staff involved across the teams is circa 250 –300.

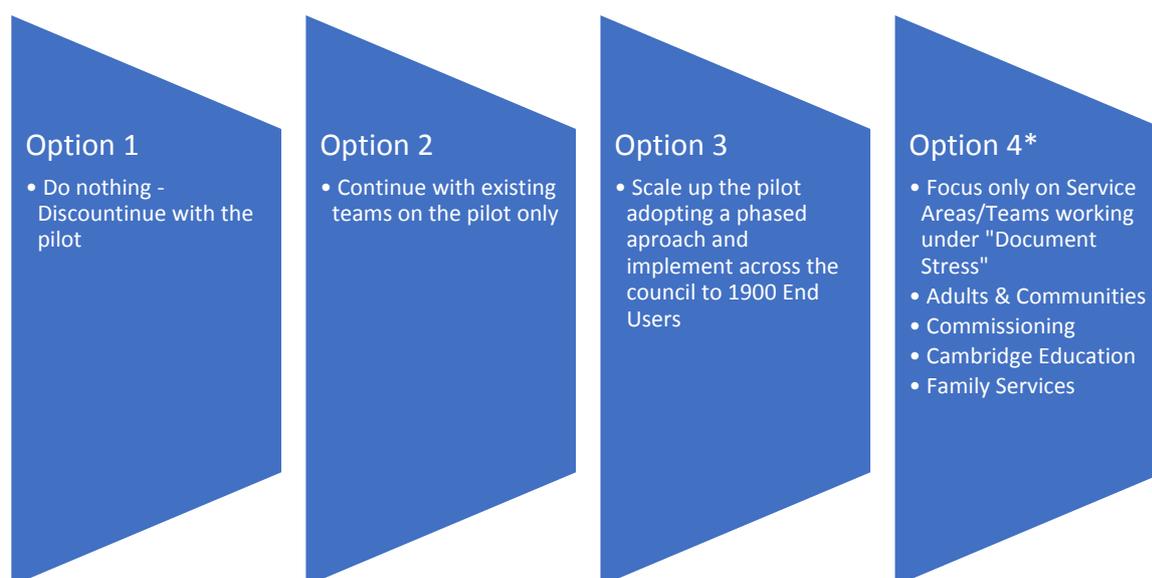


Figure 18: Options and Recommendations

11.2 The implementation of SharePoint EDMS affects internal working practices to improve the management of information at Barnet and provide users with tools that encourage collaboration and information sharing. Rather than applying a big bang approach we feel a more cost-effective way of implementing SharePoint across the Council is to adopt the phased approach outlined in Option 4 above.

11.3 This means this business case is requesting less money at a time when budgets are significantly reducing to enable the Council to re- invest more money in our front-line services. This also means that we are only putting in SharePoint where teams have demonstrated a business need to work in a digital environment, therefore, enabling them to work in a paperlight environment and in return allows more space at Colindale for staff as opposed to utilising prime office space for accommodating storage cabinets.

## 12 Advantages and Disadvantages of Each Option

Option No	Option	Advantages	Disadvantages
1	Do nothing and role the pilot back	No further costs incurred	Does not align with the TW3 Programme in terms of the new technology required to deliver the overall objectives of the program. The Council is committed to providing its staff, Members and partners with a flexible, collaborative working environment in line with modern government working practices. Collaboration is a central theme that runs right through the Council’s corporate plan. Collaboration between officers, Members and partners is the foundation stone to lead collaboration across the public sector and by doing so helping us to achieve our ambitions and aims for service improvement and cost savings
2	To continue with the existing teams that participated on the pilot	No further costs incurred	There will be no further support available Sharing and collaboration will only be available to those on the pilot Paper files accessed daily will need to transfer to Colindale and therefore additional storage space will be required that has not been accounted for in the building
3	Scale up the pilot in tranches approach and roll out to remaining 1900 End Users	Implementation is achieved over a shorter timescale  Aligns with the TW3 Programme in terms of the new technology	Implementation costs would be much higher as opposed to spreading the costs out on a “needs by basis”. Not everyone will benefit from SharePoint such as delivery units providing front line services who use back office systems. It is also not good Records Management practise to apply a big bang adoption in terms of transferring all users to a new system simultaneously

		<p>required to deliver the overall objectives of the program.</p> <p>Will eventually replace standard shared drives once fully implemented across the Council</p>	
4	<p>Adopt a targeted approach This means focusing only on teams who are currently working in “Document Stress” where too much reliance on paper heavy processes and storing information on the shared drives not being able to collaborate and share information effectively</p>	<p>A targeted approach means less capital expenditure.</p> <p>Only onboards teams that meet the right criteria for the first phase of the implementation targeted” approach.</p> <p>Less resource is required within the project team</p> <p>Streamlines the team’s day to day activities by working in a born digital environment</p>	<p>The implementation will take longer as opposed to a big bang adoption</p> <p>Requires effort to make a shift in culture, changing the way staff, Members and partners currently work.</p>

		<p>Helps support the Councils strategic objectives and the TW3 programme</p> <p>Aligns with the TW3 Programme in terms of the new technology required to deliver the overall objectives of the program.</p> <p>Will eventually replace standard shared drives once fully implemented across the Council</p>	
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Figure 19 Advantages and Disadvantages of each Option

12.1 To successfully achieve the desired benefits of the TW3 programme option 4\* is therefore recommended. This means we would only look to implement SharePoint EDMS to service areas where there is a “Critical” business need. This would streamline their day to day business activities by storing, managing, collaborating and sharing information more effectively with staff, Members and partners enabling them to free up time to spend on their vital areas of responsibility. Providing staff with the appropriate tools to carry out their day to day business functions more effectively.

### 13 Summary Assessments of EDMS Options

Option No	Option Detail	Cost	Usability	Accessibility	Integration	Reduction in Search Time	Sharing and Collaboration Inc. external partners
1	Do nothing and roll back the pilot	x	x	x	x	x	x
2	To continue with the existing teams that participated on the pilot	✓	x	x	x	x	x
3	Scale up the pilot in tranches and roll out to remaining 1900 End Users	✓	✓	✓	x	✓	✓
4	Adopt a targeted approach This means focusing only on teams who are currently working in "Document Stress" where too much reliance on paper heavy processes and storing information on the shared drives not being able to collaborate and share information	✓	✓	✓	x	✓	✓

Figure 20: Summary Assessment

Filename: SharePoint EDMS FBC

Date: 10/05/2018

Version: V1 Final

## 14 EDMS - Associated Risks with Each Option

Option No	Option Detail	Risks
1	Do nothing and roll back the pilot	<p>Staff, members and partners will not be able to work in a collaborative and agile environment. This is especially intensified when we move to Colindale where staff will be required to work more flexibly away from the office.</p> <p>Negative impact on service delivery</p>
2	To continue with the existing teams that participated on the pilot	<p>There will be no support budget for the application to be maintained.</p> <p>No global control in terms of administration and security access</p> <p>Usage will not be monitored</p> <p>Pilot users will not be able to embrace the full functionality of SharePoint</p> <p>Negative impact on service delivery</p>
3	Scale up the pilot in tranches and roll out to remaining 1900 End Users	<p>Rolling out to all 1900 staff will not be a cost-effective approach as not every staff member will require SharePoint and therefore will not benefit from having it.</p> <p>Slow adoption if the right training is not delivered</p>

		<p>User resistance due to cultural change</p> <p>Users are not allocated sufficient time to attend training sessions due to work pressures especially DU's that provided front line services</p> <p>Managers not promoting the use of SharePoint. The roll out needs to be endorsed by senior managers</p> <p>Network capacity unable to cope</p> <p>Pressure on timescales for full roll out Timescales are unrealistic SharePoint is not implemented in the planned timescales and benefits are delayed</p> <p>Lack of availability or priority in terms of Insufficient communications coming out from Change workstream People not sufficiently aware of the changes and resist changing</p> <p>System deployment is delayed</p> <p>Lack of money and availability of skilled staff</p> <p>Technical work not done, or delayed, and costs more</p>
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		<p>Security privileges not managed          Security privileges incorrectly correctly set up          Specific business areas are not able to work in SharePoint</p>
4	<p>Adopt a targeted approach This means focusing only on teams who are currently working in “Document Stress” where too much reliance on paper heavy processes and storing information on the shared drives not enabling staff to collaborate and share information effectively</p>	<p>Slow adoption if the right level of training is not provided</p> <p>User resistance due to cultural change</p> <p>Users are not allocated sufficient time to attend training sessions due to work pressures especially DU’s that provided front line services</p> <p>Managers not promoting the use of SharePoint. The roll out needs to be endorsed by senior managers</p> <p>Insufficient ongoing support and maintenance if Capita Admin team are not fully trained on all aspects of the SharePoint functionality</p> <p>Network capacity unable to cope</p> <p>Pressure on timescales for full roll out          Timescales are unrealistic          SharePoint is not implemented in the planned timescales and benefits are delayed</p> <p>Lack of availability or priority in terms of          Insufficient communications coming out from</p>

		<p>Change workstream People not sufficiently aware of the changes and resist changing</p> <p>System deployment is delayed</p> <p>Lack of money and availability of skilled staff</p> <p>Technical work not done, or delayed, and costs more</p> <p>Security privileges not managed Security privileges incorrectly correctly set up Specific business areas are not able to work in SharePoint</p>
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Figure 21: Summary of Assessments

## 15 Summary of Lessons Learnt from the Pilot

15.1 The most pertinent lessons learnt from the pilot are summarised below and have been factored into the project management approach and recorded in the lessons learnt, risk and issues log for future reference.

- A theme which developed across all the pilot teams was that the pilot was not so much about the technology which was being tested but more about the implementation, the End User experience, training and the challenges to overcome with the cultural shift from working in a heavy paper based environment and the transition to working in a collaborative and agile way. It is paramount in ensuring line managers support and drive through this enormous change in the way staff are expected to work and embrace the new technology. Despite constant attempts to get staff to adopt SharePoint whose line managers signed up for their teams to commit to the pilot it is certainly not a case of asking once or twice for staff to try the new technology. There needs to be a constant drive and push to steer some staff into using it. This can only come from the project team, senior managers and change champions. Figure 22 provides an illustration of pilot user adoption between Jan – April
- Staff engagement was also challenging at times throughout the pilot in terms of their availability to meet with the project teams. Should this business case be approved there is an expectation on line managers to allow time for the project team to work with the teams to design their file plans and to also participate in user acceptance testing including time out to attend End User training sessions. Line managers will be accountable for making sure their respective teams are allowed the time needed to not only work with the project team to get them to a state of readiness for onboarding, line managers need to ensure they champion the platform but also commit to allowing adequate time for End Users to attend their scheduled training sessions and moreover release staff to work closely with the project team when it involves building their file plans
- The Procurement process could have been more robust by CSG who managed the entire procurement process. Significant gaps were identified by the SharePoint project team (the customer) where processes had not been followed correctly. These have all been addressed with CSG to ensure there is no repeat occurrence when procuring the software from the supplier for the roll out
- Different terminology was used in the training sessions which caused confusion. Should this business case be approved a Glossary of Terms will be provided to the delegates in advance of their training
- We will conduct a self-assessment of Technology/SharePoint experience for End Users/Power Users ahead of their training to tailor the training to their specific needs

- Training content delivery will be tailored to walk-through the teams’ specific areas such as file plans, sites and document libraries in SharePoint
- AI will deliver training to a group of SharePoint Champions who are considered as more “tech-savvy”, and are adequately competent enough to support a “train the trainer” approach
- We will allow sufficient time for building file plans. This was perhaps the most time-consuming task for the project team
- Figure 22 below illustrates the % of users from each of the teams who actively participated in the pilot. The results indicate more time is required to encourage users who may require additional support when learning a new system. This will all be considered for the full roll out.

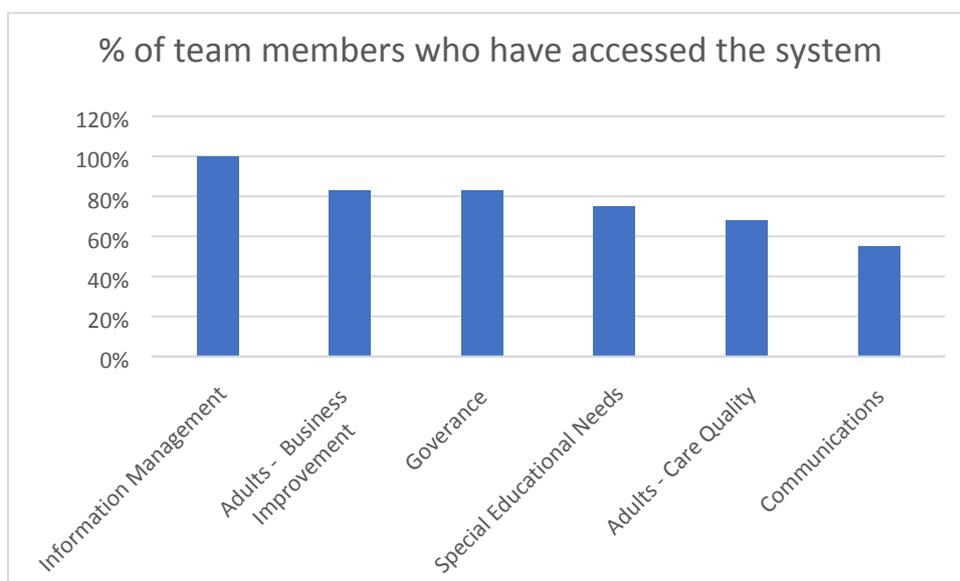


Diagram 22: % of team members who have accessed SharePoint

## 16 Equality and Diversity

### 16.1 Approach

### 16.2 The Equalities Act 2010 and Section 149 which sets out the General and Specific Public Sector Equality Duties (PSED) require public bodies to have due regard to the need to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by the Equality Act 2010;
- Advance equality of opportunity between people from different and

- groups; and
- Foster good relations between people from different groups

16.3 Equality and diversity issues are a mandatory consideration in the decision making of the Council. This requires decision makers and elected members to satisfy themselves that:

- Equality considerations are integrated into day to day business.
- All proposals have properly taken into consideration what impact, if any,
- there is on any protected group and what mitigating factors can be put in place

16.4 The protected characteristics are age, disability, gender, marriage and civil partnership, pregnancy, religion and belief, sexual orientation and transgender status.

It was not considered necessary to carry out a self-assessment equalities questionnaire with the teams involved in the pilot, (therefore we do not have evidence on all the protected characteristics). We took a light touch and proportionate approach through the working relationship with individual team members and we were satisfied that the teams involved in the pilot were likely to reflect a range of diversity across the 9 protected characteristics. No issues emerged during the pilot which suggested any adverse impact on any particular personal characteristic.

16.5 No direct adverse impact has been identified throughout the initial pilot. The SharePoint EDMS project affects internal working practices to improve the management of information at Barnet and provide users with tools that encourage collaboration and information sharing. We think the impact has been positive for all groups throughout the pilot and we will continue to monitor and explore the impact of our proposal on the protected characteristics.

16.6 There is a positive impact of this project that optimise the potential impact of the TW3 programme.

Disabled or staff with health conditions will be able to work more flexibly and not have to attend offices for meetings. There are also potential benefits for parents and carers who may be able to work more flexibly at home or other locations.

An assessment has been carried out on any staff impact of these and we anticipate there will be no impact for the reasons listed below because:

- All Staff who will be affected by SharePoint EDMS are already working in digitally included ways and selection criteria will be included for new recruits.
- All Staff and new recruits will receive training when implementing SharePoint EDMS and any particular individual needs will be identified and addressed as part of the implementation
- We will be working with any staff and new recruits who have a disability which requires an adjustment with regard to new technology. Some of these will already

be known to managers and some may only become apparent as the new technology is deployed. Any further adjustment required because of SharePoint EDMS will be accommodated through the management of change process and is dependent on the wider the 'Way We Work Programme'.

- 16.7 Equality impacts will be kept under review as the implementation of SharePoint EDMS develops.
- 16.8 The staff equalities data used to analyse the equalities impact was provided by Human Resources (HR). A copy is available on request.

## 17 Information Assurance and Security

- 17.1 Ensuring appropriate access and security to information and records will be a key part of each of the projects. Whilst the Council already has policies and processes that manage access to and security of information, these will need to be amended for our new working environment. The Information Management Team and Information Security (IS) will remain key stakeholders and supporting partners within the SharePoint EDMS project.
- 17.2 To deliver assurance, a full Information Management Impact Assessment (IMIA) will be completed and reviewed and amended as necessary throughout the project. An IMIA looks at the project's aims and objectives, the workflows of information and the processes to manage the information. It considers the access, sharing, security and privacy rights relating to the project and identifies whether a Privacy Impact Assessment (PIA) is required. Completing an IMIA allows the council to identify potential issues and apply good practice, allowing the project to make the best use of information and achieve objectives, whilst ensuring appropriate risk management and compliance with legislation.

## 18 Security

- 18.1 Security considerations is a key aspect of SharePoint as described above. As the council's current, shared drive environment is more difficult to manage, moving to SharePoint EDMS aims to improve security and access controls. Processes for managing access and security will be considered either through SharePoint EDMS, or through complementary software, such as that designed specifically for managing user access to documents. Bitglass software has been specified as a cloud access security broker and proxy, and this solution will be ratified by the Government Digital Service (GDS) as part of detailed design. This gives an additional security wrapper over the generic Microsoft Cloud security, to meet GDS Cloud Security principles manage them. Risk assessments and technical tools, such as penetration tests have also been used to identify risks and allow the Council to choose its risk tolerance in various areas.

## 19 Support

- 19.1 It is a key part of the Information Management Strategy to support delivery units, partners and the commissioning function in their management of information. Support to the project itself and to relevant stakeholders will continue throughout the projects. As the projects transition to business as usual, IS will continue to provide technical support for SharePoint EDMS.
- 19.2 The records management function within IMT will lead on day to day management of the EDMS. Additionally, and in line with the IM Strategy, IMT will continue to review and develop policies and procedures that promote realistic security and control, ownership and effective management of information, whilst supporting delivery units and partners to achieve our corporate plan objectives.

## 20 Privacy

- 20.1 There are no unusual privacy considerations for the project generally in relation to privacy concerns of staff, customers and the organisation, as relevant access and security measures are already embedded into the way the council works. The new GDPR is now law and therefore the Council must meet the new mandatory requirements. The SharePoint project team will conduct a Data Protection Impact Assessment at the start of full roll out.

The process involved will be aligned with phase 1 of the implementation. This means by the end of the financial year 2018/2019 the Data Protection Impact Assessment will have taken place.

### 20.2 Key Issues

- That appropriate standards for access and security are translated to the new tools and that support and training is provided that encourages a smooth transition to new ways of working.
- That training ensures that staff, members and partners are aware of their responsibilities in relation to managing information and how to deliver those within the new tools and working environment.
- That the projects deliver benefits in compliance, for example, appropriate access to electronic documents is improved to reduce risks in relation to transport of paper records.
- That the projects provide improvements to how information can be managed and shared appropriately, such as collaboration tools managing technical support, appropriate process and policies and assurance in the future, where there are privacy and access concerns.

## 21 Procurement Route

21.1 There were several options considered for the procurement of the SharePoint EDMS pilot. As the full life value of the contract will be over the Official Journal European Community (OJEC) threshold then the following approaches were considered for SharePoint EDMS only:

- G Cloud 7 or 8 Framework Agreement 1557t owned by Crown Commercial Services
- Customer & Support Group (CSG) Contract – Schedule 15
- Official Journal European Community

21.2 To ensure the Council's strategic IT partner is invested in the Council's choice of EDMS which will be a core element of the overall IT architecture, and is able to provide effective on-going support for this system. The implementation of SharePoint EDMS will continue to be managed by CSG under Section 15 of the CSG contract. The Council will rigorously assess CSG's ability to implement a system that meets the Council's requirements.

21.3 This will consider both the value for money of the proposal as well as the technical suitability of the proposed solution, supported by Leidos, the Council's Technical IT Assurance partner. If, following this assessment, the Council does not feel that CSG's proposal meets the Council's EDM requirements adequately, or provides sufficient value for money, then a procurement exercise will then be run through the G-Cloud 7 and 8 Frameworks.

21.4 CSG IT will be required to demonstrate the following:

- **Systems:** We will expect CSG IT to look and review the product the Council wish to continue to use (SharePoint EDMS) post the pilot to ensure that it continues to match our business/user requirements and to also suggest alternative products if this is believed appropriate.
- **Proposals:** The proposals must be matched against the Council's requirements to enable the Council to assess which the preferable products they prefer rather than CSG IT and any subsequent bidder providing a proposal based purely around their preferred stating a system they will implement. The Council will require demonstrations of each system.
- **Milestone payments:** CSG and any subsequent bidder should commit to milestone payments with clear acceptance criteria – this includes retaining a proportion of payment until after the project has been delivered to ensure any significant issues that occur after the product is launched are resolved.

## 22 SharePoint EDMS Incremental Implementation Approach

22.1 It is not sensible or good records management practice to implement SharePoint EDMS across the Council in its entirety all at the same time. This business case therefore

recommends Option 4 illustrated in figure 18. Option 4 proposes an iterative process for the implementation of SharePoint EDMS, using agile delivery methodology. Teams working in document stress will become the first adopters of SharePoint EDMS outside of the pilot and within this current financial year 2018-2019. An illustration is provided below in figure 22 below. The implementation of the remaining teams who may have a requirement for SharePoint EDMS during 2019/2020 will be scaled up accordingly based on demand and will therefore result in parallel running for the remainder of the implementation.

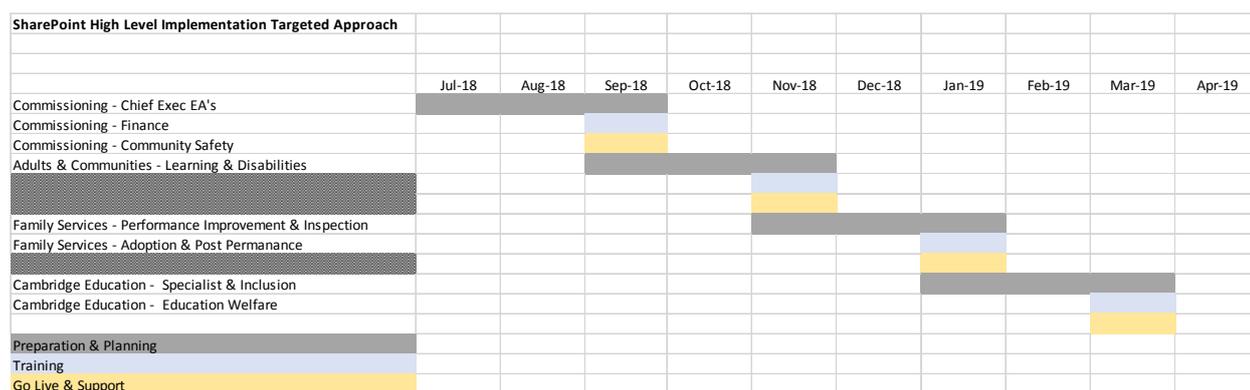


Figure 23: High Level Plan

## 23 High Level Mobilisation Activities

23.1 Based on our assumptions, good records management practise and lessons learnt throughout the pilot, figure 23 below illustrates a typical 7 phased high-level mobilisation approach:

*Note: We will work closely with the implementation partner post the award of the contract to drill down into the granular details and replace with a master implementation plan which will also take into consideration the lessons learnt previously.*



Figure 24 High level Mobilisation Activities

## 24 Training and Support for the Full Roll Out

24.1 This section sets out a possible approach to SharePoint EDMS training and takes into consideration the lessons learnt from the pilot user training. The approach and information set out has been successfully used in other projects but will be reviewed as the project progresses to ensure that it meets Council requirements and the ongoing needs of staff, Members and partners.

24.2 Working in SharePoint is a huge cultural change to staff, Members and partners that will certainly, bring various challenges, primarily the cultural shift and the introduction of the new technology which for some can often be a very daunting experience and will need to be dealt with sensitively and tailored in accordance to people's different levels of learning abilities and how they adapt to change.

24.3 The general training approach will be an iterative one whereby initial training will be delivered in a classroom environment to enable staff, Members and partners to use the system. This training will then be reinforced and tailored following a period of use. This will ensure that user experience is incorporated into subsequent training as the training is delivered. We will appoint SharePoint Champions for each team whose key role will be to support members of the team who may require additional support post their classroom training session.

Technical Administrators and Super Users of the system will also be trained by the supplier as this type of training is more intense.

- 24.4 The Information Management Team will also run a series of lunch time sessions otherwise known as 'Drop in Sessions' so that staff can come and talk in an open forum about the End User experience, technical, functionality and reliability of the EDMS system and discuss any concerns they may have about using the system.
- 24.5 In addition to the comprehensive training manuals that will be enhanced following feedback from the pilot there will also be video clips, quick reference guides and Frequently Asked Question sheets (FAQ).
- 24.6 It is also the intention to schedule walk the floor sessions more frequently than the initial pilot provided to support the End Users at their desks.
- 24.7 The Records Manager will be the first point of contact via the Records Management (RM) helpdesk for day to day queries relating to SharePoint such as changes to file plans. If an End User contacts the Information Management Team with a technical problem they will be informed to log a call with CSG IT via the normal channels.
- 24.8 The Records Manager will embrace SharePoint EDMS to deliver a series of EDMS training webinars. The idea of webinars will enable us to deliver training sessions for staff, Members and partners following their initial training should they start to encounter teething problems when using the system.
- 24.9 The Information Management Team will survey End Users at regular intervals using Survey Monkey or similar to gauge the End User's perception, experience of the system, views, adoption, including looking out for any trends that maybe forming so that these can be addressed as soon as they occur.
- 23.10 The Records Manager will post weekly newsletters and maintain a Frequently Asked Questions (FAQ) sheet which will be available on the SharePoint EDMS landing page for all users to see including alerts when new functionality is released such as 'what's new'.
- 24.11 SharePoint EDMS 1<sup>st</sup> and 2<sup>nd</sup> line support will be provided via the Information Management team and CSG IT with 3<sup>rd</sup> line support will be federated to Microsoft.

## 25 Communications

- 25.1 SharePoint EDMS implementation communications will be managed and delivered as part of the communications function. SharePoint EDMS communications are part of the broader The Way We Work (TW3) programme and therefore under the TW3 branding. The formally approved change management strategy and the communications approach are the relevant strategic documents and set out the approach to communications and engagement across the entire programme. This includes the process for review and all messaging.

- 25.2 The roll out of SharePoint EDMS including O365 represents a significant improvement in the basic productivity suite for the London Borough of Barnet. Therefore, we will take a progressive and innovative approach to how the implementation is communicated to staff using traditional methods of communication and engagement alongside new methods enabled by the new technology.
- 25.3 Communications will be delivered through established channels such as the Intranet and First Team and via new and established change champions network. Areas without access to the Council intranet will publish content through their own established channels. These electronic communications will be supported by a series of drop in sessions and other traditional media such as leaflets and posters.
- 25.4 As an example of innovation, FAQ documents are well established as an engagement tool in Barnet. For this project staff will be able to edit the FAQ directly on SharePoint once they have access, including being able to ask their own questions and contribute to other responses via a forum.

## 26 Expected Benefits

- 26.1 The expected benefits table illustrated in figure 26 illustrates the key benefits of a SharePoint implementation. Therefore, when the first phased approach is completed with the 8 teams who have asked to become early adopters of SharePoint EDMS the benefits listed in the table below will be measured in accordance with the measurable target that we have estimated based on our findings from the initial pilot. It should be noted that the benefits may change as the implementation progresses.

SharePoint EDMS Benefit Reference	Benefit type	Description of benefit	Expected benefit value	Time these benefits are expected to be achieved	How will the benefit be measured	Benefit Owner	Baseline Value and date: (£ % etc)
SP EDMS B1	Improved Sharing & Collaboration	SharePoint will improve staff experience in Sharing & Collaboration	10-50% increase in satisfaction of sharing information through collaborative working	April 2019 March 2020	Based on survey in April 2018	Jenny Obee	TBC
SP EDMS B2	Reduction in search time	SharePoint will deliver 15% reduction in staff search time through quicker and easier identification of relevant information and knowledge	15% reduction in staff search time	April 2019 March 2020	Head to head search test between SharePoint and Shared Drive	Jenny Obee	TBC
SP EDMS B3	Improved document control	SharePoint EDMS will deliver a 35% reduction in using the incorrect version of a document by using the correct version always being explicitly available	35% reduction in using the incorrect version of a document	April 2019 March 2020	Survey – Consider validity of a survey capturing document control issues pre- SharePoint	Jenny Obee	TBC

SharePoint EDMS Benefit Reference	Benefit type	Description of benefit	Expected benefit value	Time these benefits are expected to be achieved	How will the benefit be measured	Benefit Owner	Baseline Value and date: (£ % etc)
SP EDMS B4	Reduced disaster recovery costs	SharePoint will deliver a reduction in disaster recovery costs by March 2020 by the use of cloud storage	10% reduction in disaster recovery costs	April 2019 March 2020	Source TBC	Jenny Obee	TBC
SP EDMS B5	Copying and re-using information	Time savings due to improved access to similar information which can be copied and re-used ensuring we do not reinvent the wheel.	5% increase in re-using existing information	April 2019 March 2020	Survey - estimated time savings due to reusing existing information	Jenny Obee	TBC
SP EDMS B6	Mobile staff are able to access, capture and manage electronic information quicker	Increase in satisfaction from mobile users	20% Increase in satisfaction from mobile users	April 2019 March 2020	Staff surveys and drop in sessions focusing on effectiveness now, then mid implementation /post implementation.	Jenny Obee	TBC

Figure 25: Expected Benefits

## 27 Summary of Key Risks

27.1 This section summarises the key risks associated with the recommended option for SharePoint EDMS. Initial mitigation strategies are also identified.

Ref No	Description	Mitigation	Current Risk Score
SP EDMS 1	Insufficient storage and network capacity affects performance. Insufficient storage capacity may not be available for corporate roll out level. The system may reach capacity as more service areas migrate to the EDMS platform EDMS resulting in performance issues	Liaise with Technical Infrastructure team to review capacity and monitor storage availability as implementation progresses. This is also being managed as a separate project outside of the EDMS project by Capita.	4
SP EDMS 2	Poor clean -up of shared drives post implementation.	Nominated team representatives will need to be identified to ensure shared drives are cleansed in accordance with agreed timescales. Progress will be monitored by the project team. Slippage will be recorded and escalated to team managers where necessary.	6

Ref No	Description	Mitigation	Current Risk Score
SP EDMS 3	Security privileges not managed. Security privileges incorrectly set up Specific business areas are not able to work in SharePoint	A review of permissions in all SharePoints environment's will be required to be in place prior to UAC testing and deployment	2
SP EDMS 4	The implementation has a set budget to work with. If the scope increases in an uncontrolled manner budget may not be sufficient to deliver all objectives.	Close monitoring of budget and highlight to programme board any concerns. Scope full implementation will be locked down pre-contract signature stage	1
SP EDMS 5	Scope will be locked down at point of contact signature	Scope changed will be locked down at time of contract signature	6
SP EDMS 6	Monitor delivery against communications plan and work closely with TW3 Change Manager to ensure consistent and accurate communications as cascaded appropriately and in accordance with the TW3 communications plan	Work closely with TW3 Communications	2

Ref No	Description	Mitigation	Current Risk Score
SP EDMS 7	Network demands arising out of O365 & EDMS deployment Higher demands than anticipated on the LAN and WAN.	<p>Based on existing network load (obtained via Cisco platform) it is anticipated that there is sufficient capacity for 1500 “heavy users” (Skype video and audio) and 1500 “light users”</p> <p>BAU project underway to assess the network capacity requirements. This is also being managed as a separate project outside of the EDMS project by Capita in parallel with the storage capacity project.</p> <p>There are plans to upgrade the Internet pipe to 200MB. This is scheduled to take place after the election period. This pipe is dedicated traffic for Office 365:</p> <ul style="list-style-type: none"> <li>. Email</li> <li>. OneDrive</li> <li>. SharePoint</li> <li>. Skype for Business</li> </ul> <p>This will guarantee network traffic bandwidth for Office 365.</p>	20
SP EDMS 8	Training plans for SharePoint	Training workshops will be scheduled. Supplier will deliver initial training workshops. A train the trainer approach will also be included as part of the supplier delivery/implementation approach and SharePoint Champions will also be appointed	2

Figure 26: Summary of Key Risks

## 28 Cost Investment and Appraisal

SharePoint Phase Implementation	Costs
IT Implementation costs (capital)	£153,000
Project Manager, Records Officer, SharePoint Developer (capital)	-
- SharePoint Developer – 0.6 FTE. Full time cost, £90k	£54,000
- PM – 0.6 FTE. Full time cost, £90k	£54,000
- Records Officer – 0.5 FTE. Full time cost, £30k	£15,000
IT support costs (revenue)	£25,000
<b>Total Phase Implementation Costs (capital)</b>	<b>£276,000</b>
<b>Total Phase Support Costs (revenue)</b>	<b>£25,000</b>

Figure 27: Cost Investment Appraisal

The cost to undertake this 1<sup>st</sup> phase of the SharePoint EDMS implementation for up to 300 users over a period of 12 months will not exceed a capital spend of £276,000 see figure 6 below. The revenue costs create a pressure, which can be managed through the application of retention and disposal on the council's home drives, shared drives and off-site storage of paper records. The reduction in cost this financial year will at least meet these increased revenue costs to net these off.

## 29 Project Assurance

Project Assurance Plan					Outcome of Project Assurance Activity			
Phase	Assurance Activity	Assurance Date	Milestone	Milestone Date	Individuals/Stakeholders Involved	Actions Recommendations	Expected Implementation Date	Actual Implementation Date
Stage 1	Closure of successful pilot	April 2018	TW3 Programme Board	April 2018	TW3 Programme Board/Delivery Units	Proceed to Full Business Case	July 2018	TBC
Stage 2 Project Start Up	Full Business Case Approved by P&RC	June 2018	Policy & Resources Committee	June 2018	Policy & Resources Committee	Proceed to stage 3	June 2018	TBC
Stage 3 Procurement	Ratification of Procurement Recommendation - EDMS	June 2018	Procurement	July 2018	Procurement	Proceed to stage 4	July 2018	TBC
Stage 4 Implementation	Confirmation to start mobilisation	July 2018	TW3 Programme Board	July 2018	Programme Board Decision	Mobilisation commences proceeds with Delivery Units phases 2-6	March 2019 for Phases 1-6 in FBC	TBC
Stage 5 Closure	Closure of phased implementation Phases 2-6	March 2019	TW3 Programme Board	March 2019	Programme Board Decision	Phases 2-6 completed	March 2019	TBC

Figure 28: Project Assurance

## 30 Dependencies

Ref No	Dependency
DEP 1	<p><b>Internet Traffic</b></p> <p>A suitable IT infrastructure capable of supporting both the demands of EDMS and O365. At the time, this business case was authored the current situation is as follows:</p> <p><b>LBB internet pipe</b> Size: 100MB Usage: Fluctuating between 70-85%</p> <p>This pipe is used for standard internet traffic:</p> <ul style="list-style-type: none"> <li>. Internet searching</li> <li>. Web based line of business applications hosted outside of Capita data centres (e.g. Exxor, Swift)</li> </ul> <p>There are plans to upgrade this pipe to 200MB. This is scheduled to take place after the election period.</p> <p><b>Microsoft Azure ExpressRoute</b> Size: 500MB Usage: minimal</p> <p>This pipe is dedicated traffic for Office 365:</p> <ul style="list-style-type: none"> <li>. Email</li> <li>. OneDrive</li> <li>. SharePoint</li> <li>. Skype for Business</li> </ul> <p>This will guarantee network traffic bandwidth for Office 365.</p>
DEP 2	<p><b>Resources</b> Availability of resources for project delivery</p>
DEP 3	<p><b>End User Engagement</b> Engagement with key stakeholders, business owners and decision makers being available to engage with the project team</p>
DEP 4	<p>Delivery units/teams will be expected to engage frequently and work with the project team. This work will be determined at the Stakeholder/User requirements workshops. There is a dependency on the delivery units cooperating for SharePoint EDMS to be used to its full potential going forward.</p>
DEP 5	<p>A phased approach will be adopted for migrating teams across to SharePoint EDM in accordance with the people moves across to Colindale including any special projects that maybe taking place. This will be agreed during the user engagement workshops such as Ofsted inspections or similar.</p>

Figure 29 Dependencies

## 31 Appendix A Glossary of Terms

Abbreviation and Term	Description and Definition
CSG	Customer Support Group
CSG IT	Customer Support Group IT
EDMS	Electronic Document Management System
FAQ	Frequently Asked Questions
GDPR	General Data Protection Regulation
GDS	Government Information Security
IMT	Information Management Team
IS	Information Security
LBB	London Borough of Barnet
O365	Office 365
OJEC	Official Journal European Community
TW3	The Way We Work

### 33 Document Control

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<b>Date</b>	<b>Version</b>	<b>Reason for Change</b>	<b>Changes made by</b>
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29/03/2018	V03	Review & feedback from JO	Jenny Obee/Jane Proffitt
02/04/2018	V04	Review & feedback from JO	Jenny Obee/Jane Proffitt
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#### 33.2 Distribution List

<b>Name</b>	<b>Role</b>	<b>Date</b>
Jenny Obee	Head of IT & Information Management	
Cath Shaw	Deputy Chief Executive	

#### 33.3 Approvals

By signing this document, the signatories below are confirming that they have fully reviewed the Full Business Case for EDMS, O365 and UC project and confirm their acceptance of the completed document.

<b>Name</b>	<b>Role</b>	<b>Signature</b>	<b>Date</b>	<b>Version</b>
Jenny Obee	Head of IT & Information Management			V1
Cath Shaw	Deputy Chief Executive			