

Microsoft SharePoint & Nintex deliver business transformation for committee report clearance at Redbridge Council

The Council is now able to better manage their committee report clearance process delivering improved quality, productivity, oversight and compliance.

Redbridge has been known as the 'leafy suburb' but with many regeneration projects in place, the borough is developing and harnessing Crossrail which will bring Redbridge closer to central London than ever before. It will further enhance its fast-improving status as an emerging and well-connected place to live. Redbridge Council is located in east London and is the authority responsible for providing local government services to approximately 300,000, it is also one of the most ethnically diverse local authorities in London.

The challenge

Every Local Authority is required to generate large numbers of reports for committees and boards but do not have an efficient and effective way of managing this process.

A number of Local Authorities, including the London Borough of Redbridge, have recently approached Deltascheme looking for a low cost, innovative way of using proven technologies to resolve the challenges they experience in managing the end-to-end processes associated with committee reports. These challenges typically include:

- Democratic Services Officers struggling to manage multiple copies of the same document, particularly when the internal process relies on the use of email to distribute the reports for review, amendment and approval. This leads to different people editing different copies of the same document simultaneously.
- Staff are often unable to properly identify who has reviewed a document and which comments belong to which person. Current systems often allow users to see the user's role (e.g. 'Legal Business Partner') or team (e.g. Legal) but not the name of the actual person.
- Users, particularly Democratic Services Officers and Directors, need to know where in the approval process each report is, e.g. is it at 'draft' stage, or with a business partner for commenting, etc. but there is currently no reliable way of tracking the status.
- Often, when a user is approving a report, their approval may be conditional upon the report author making an edit to the report, in which case they need to assign the task back to the author. Existing working practices do not currently have any effective way to manage and track this activity.

London Borough of Redbridge



- Democratic Services Officers need to ensure that deadlines are adhered to for each approval stage for every report. Tracking, communicating, chasing and reporting on each stage of each report is often a very difficult, inefficient and arduous task for staff.

These Local Authorities, like most today, have already purchased and implemented Microsoft SharePoint, or SharePoint Online (as part of Office 365), and are looking for solutions for committee report clearance that can be delivered through SharePoint, using either out-of-the-box functionality or complimentary 3rd party 'plug-in' products.



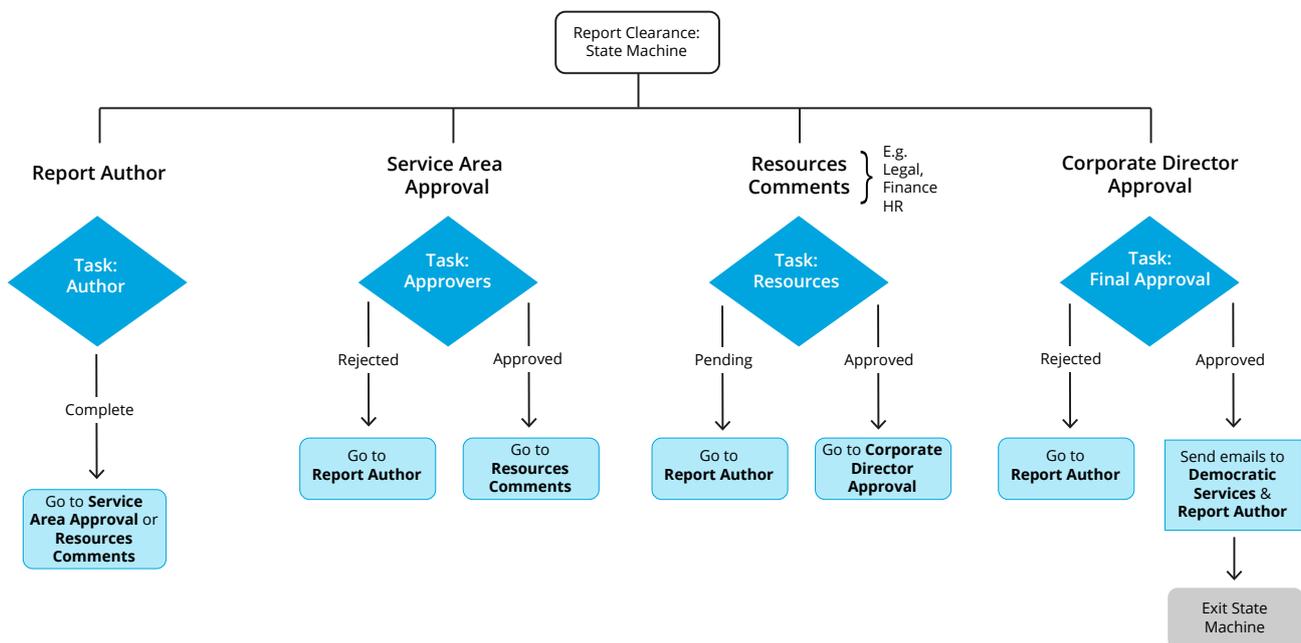
The solution

Having reviewed the requirements outlined by these Local Authorities, Deltascheme recommended a solution based on the use of Microsoft SharePoint (or SharePoint Online with Office 365) with the addition of a 'no-code' 'plug-in' product for SharePoint called Nintex. The combined solution was therefore able to offer the following:

- An electronic form for creating reports in the system.
- A single copy of the report document, stored in SharePoint, along with any appendices. Each report has a unique reference number generated by the system.
- The relevant, up-to-date, report template automatically generated for each report, with tracked changes on by default.
- Support for cabinet and non-cabinet reports.
- Document management features including; co-authoring (the report document can be worked on simultaneously by multiple people), version control, permissions management and full support for Microsoft Word which enables tracked changes, comments, etc.

- A workflow to automatically assign tasks to the next person in the clearance process, with deadlines and reminders. There is an email notification for each task.
- The ability for up to two Report Authors to be assigned to a report, where either can complete the task, similarly the secretaries to Corporate Directors are able to complete approval tasks on their behalf.
- A full audit trail of who has reviewed, commented on, or approved the report document.
- The ability for users and Democratic Services Officers to delegate tasks to different individuals if a member of staff is away or ill.
- A dashboard to track the status of each of the reports from beginning to end and an immediate view of who's task is currently outstanding.

Summarised below is an outline schematic of the process steps that were configured in Nintex to address the requirements outlined.



Benefits

Since implementing this solution Redbridge Council has found that there are numerous benefits, especially with regards to the efficiency, compliance and oversight of their reports clearance process. Specific benefits that they have realised include:

- Having a single copy of the document in SharePoint means that there will never be multiple copies of the report to chase down and merge, and users can be confident they are always working on the most recent version.
- Since each activity in the solution is associated with a 'workflow task', it means that there is an audit trail of who has done what and when, to each report. This brings transparency to the process and helps prevent bottlenecks.
- The approval process is separated into multiple stages and the workflow updates the information associated with the document so that users can easily see where any report is in the process. This brings greater visibility and oversight to the whole process.

- Automatic reminders are sent if a task has not been completed before a set period. Additionally, a dashboard style view of all outstanding tasks is made available to the Democratic Services Officers, so they can easily see who to chase if a task has not been completed in time.
- The workflow brings structure to any 'conditional approvals'. This delivers flexibility and allow tasks to bounce back and forth between an approver and the report author until the approver is ready to finally approve the report so it can then move on to the next stage. This delivers a balance of both structure and flexibility, helping users to collaborate more efficiently and be empowered rather than hindered by the system.

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It has been a real pleasure working with the Deltascheme team, and I can happily speak for others when I say that they have been extremely patient with us. Their knowledge and support on the project has been fantastic. Our senior leadership team are impressed with the solution and with the professional nature in which it has been delivered.”

Neil Weller

Enablement Project Manager, Change Team
London Borough Redbridge

About Deltascheme

With over 30 years' experience, Deltascheme is a leading provider of services and solutions for Microsoft SharePoint and Office 365 for content management, collaboration, business transformation, process automation, case management and to support new ways of working. Our services and complementary products also support the migration of existing content, through discovery and auto-classification, the establishment of robust information architectures to drive compliance (e.g. GDPR) and to enable integration with other business applications. Specifically, we can help with:

- The delivery of effective and scalable Content, Document & Records Management Systems
- Corporate Intranets and Extranets

- Assistance with the migration of content from file stores or existing EDRM systems into SharePoint
- Intelligent Process Automation (workflow)
- Electronic forms and off-line/mobile working
- Integration with line-of-business applications or systems (CRM, SAP, Agresso, Northgate, etc.)
- Configuration of reporting & business intelligence solutions
- Applications and portals (e.g. procurement, contract management, health & safety, etc.)

Delivery of case management solutions (e.g. complaints, claims processing, FoI requests, etc.)

To find out more about how Deltascheme can assist your organisation please contact either Peter MacDiarmid (peter.macdiarmid@deltascheme.com) or Duncan Williams (duncan.williams@deltascheme.com) on **01628 401800** or go online to: **www.deltascheme.com**