



State agency engages Optimum for Office 365 and SharePoint governance and workflow automation

Optimum brings efficiency, automation, and governance to a client's SharePoint and O365 environment.

Organization

State-level government agency

Industry

Government

County

United States

Challenges

An imminent on-prem SharePoint migration to the Cloud (Office 365) left the agency in need of a robust SharePoint and Office 365 governance plan, best practices, and department-specific process optimization.

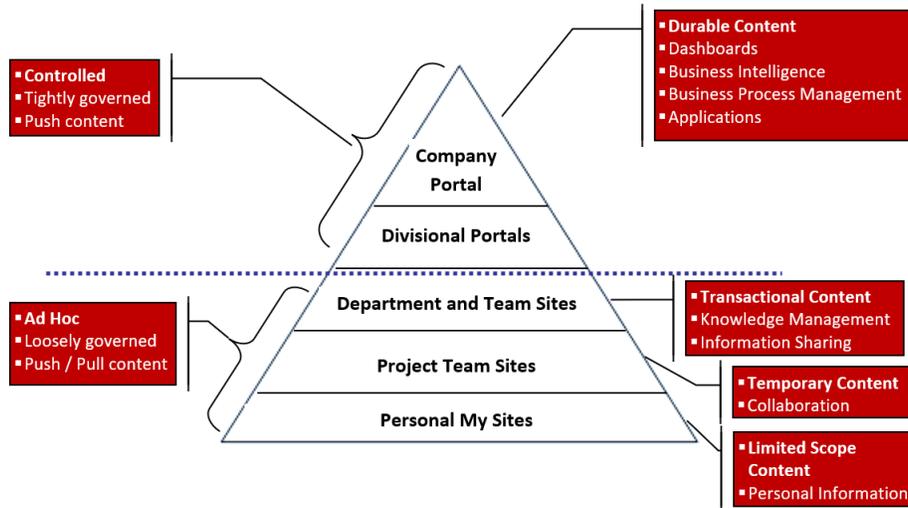
Optimum's Involvement

Optimum assessed the Office 365 environment and developed a comprehensive Governance Plan, including security, document management, and administration best practices. Optimum helped to streamline the IT department's work processes and automate the agency's CAB workflow.

Deliverables

Department-specific process maps and optimization recommendations around document mgmt., workflows, security, and collaboration best practices. A customized SharePoint governance and Nintex workflow automation.

Optimum's SharePoint governance enables information security and compliance



Migrating an entire organization's SharePoint environment to the cloud is no small task! Security, user permissions, information architecture and document library structure, departmental content clean-up as well as existing forms and workflows migrations need to be considered and designed into the destination environment. Most migrations to Office 365 usually cover the physical migration of the files and content into the cloud without completely addressing the key governance factors, mentioned above.

Optimum was engaged by the Texas Department of Juvenile Justice (TJJD) to help with establishing a solid Office 365 environment with the right governance and policies in place after the migration.

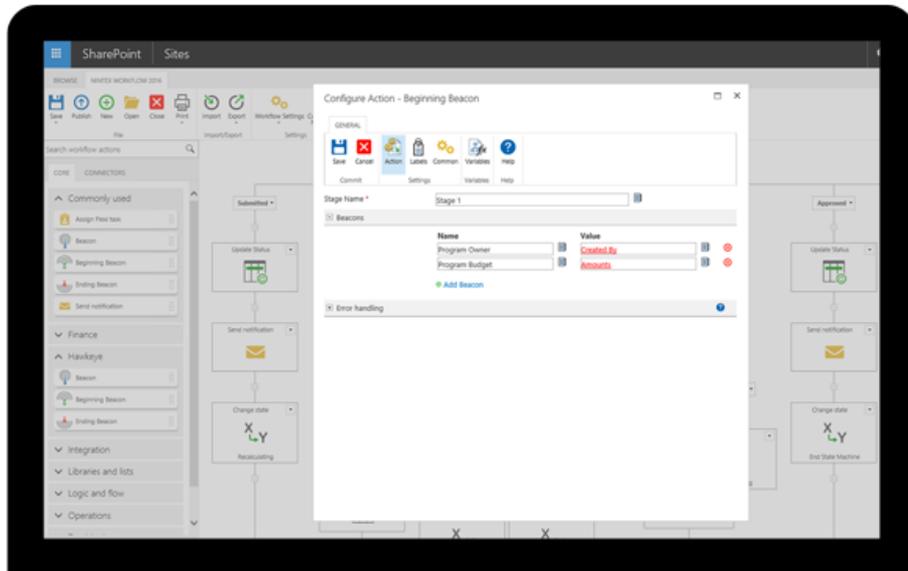
Working with the client to thoroughly understand their department-specific Office 365 and SharePoint needs and goals, the right information architecture and content structure for each department, and collaboration and communication needs, Optimum's team of Office 365 and SharePoint experts created

a customized Office 365 and SharePoint Governance Model and Framework to bring best practices in security, information architecture, content and document management, Office 365 apps usage, data backups, and more to the agency.

This framework integrated the client's collaboration and communication needs, information architecture, security compliance requirements, content and document management goals, forms and workflows, as well as SharePoint-specific best practices into one solid and actionable governance plan.

This integration ensured the new Office 365 and SharePoint environment would serve the client's needs for years to come, while also making critical data accessible to the appropriate level of users.

Optimum helps optimize and automate the IT Department's work processes & CAB workflows



Well-defined and streamlined processes within each department, as well as process hand-offs across various teams and departments, is critical for ensuring that high-risk, high-urgency and critical tasks are appropriately prioritized and managed accordingly.

Through workshops and interviews with stakeholders and departmental SMEs, the Optimum team identified, mapped, and documented the as-is and to-be business processes, from detailed process steps to data flows between systems, notifications and approval points, and the integration requirements between client's existing software systems.

We then identified and recommended the areas for process optimization as well as process automation through the application of automation technologies, such as Microsoft Flow and Nintex.

One of TJJJ's areas of focus for process automation was the Change Advisory Board (CAB) process due to its complex approval workflows and process touchpoints between various teams. Optimum first defined and mapped the optimized process in working with TJJJ's CAB stakeholders. We then utilized the [Office 365 environment](#) and [Nintex's workflow automation solution](#) to automate the work processes and ensure that relevant CAB personnel are notified of requests in their queue, work is getting done across multiple teams with the proper and timely hand-offs for deliverables, and the ticket submitter is informed of their ticket's progress through the workflow.

Nintex's solution, coupled with the SharePoint and Office 365 capabilities, also allowed for detailed visibility into the CAB process, bringing more efficiency, time-saving, and productivity for the agency's employees and IT department.

About Optimum

Optimum is a modern Software Solutions and Services firm, transforming businesses through the power of People, Technology, and Automated Processes.

By utilizing our expertise and experience in strategic planning, process optimization, and innovative technologies, our clients gain clarity and productivity, reduce operational and labor costs, ensure compliance, and enable business automation and transformation.

Optimum offers a full suite of software services and solutions, including Custom Software Design and Development, Business Advisory Services, Business Process Automation, Systems Integration, Business Intelligence and Analytics, Work Management and Collaboration Solutions, IT Project Management and Business Analysis, and Staff Augmentation. Learn more by visiting www.optimumcs.com.

About Nintex

Nintex is the global standard for process management and automation. Today more than 8,000 public and private sector clients across 90 countries turn to the Nintex Platform to accelerate progress on their digital transformation journeys by quickly and easily managing, automating and optimizing business processes. Learn more by visiting www.nintex.com and experience how Nintex and its global partner network are shaping the future of Intelligent Process Automation (IPA). For additional information, visit

<https://www.optimumcs.com/business-work-automation/>

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