City Government

A long-term city government client needed secure project collaboration tools to support their ongoing needs.

Products Used

- Microsoft Office 365
- SharePoint Online

The Problem

A city government client reached out to Datavail to request a collaboration solution built on top of Office 365. Its current solution did not meet the governance requirements.

- Whenever a new project started, the client created a site to put all the data. Everyone had access to the sites in this setup.
- Sites were duplicated or did not contain enough information.
- Project sites needed information captured during the setup process.
- The sites did not have any reporting capabilities on key project metrics.
- The sites did not have any way of reporting on status of project, invoice, milestones and so on.

The city government also requested assistance with a project collaboration solution that could provide some robust project tracking capabilities while reducing the significant amounts of manual data entry for invoices and tracking required in their existing solutions.

The Solution

Datavail used Office 365 as a base engine for this city government client. The process to create a project site was changed to use a custom form and streamlined workflows. The site governance was also enhanced using provision engine and workflows. This solution served to:

- Eliminate site duplication.

- Capture all needed information to set up a site.

- Create multiple layers of automated and manual approval.

- Restrict access to sites to authorized users only.

- Automatically select the right site template for the project type.

- Significantly reduced manual data entry by automating some data capture during document uploads.

- Provided project metrics reporting capabilities within and across sites and projects including project timelines and milestone tracking.

- Enhanced reporting and alerting capabilities.

For the project budget tracking, Datavail added functionality to drop invoices into the document library that would ask a few questions about the invoice and then automatically track and categorize it for the budget. In addition, the solution integrated Microsoft Teams in ways that enhance project collaboration.

The Results

The city government now has a system with robust project collaboration tools, based on SharePoint Online and Microsoft Office 365:

- Reports information across the project for project managers.

- Monitors milestone progress.

- Identifies outstanding invoices.

- Improves visibility and communication for projects.

- Improves efficiencies.