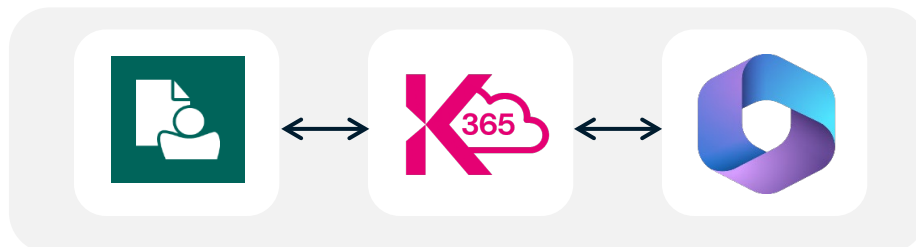


## CASE STUDY



### Making Waves: Streamlining Governance with Microsoft 365

How Central Highlands Water implemented managing Tender Documentation in M365



#### Client

Central Highlands Water is a Victorian Water Authority with a complex information management infrastructure. They faced a significant challenge in securely managing and sharing a large volume of data for an important tender process. This was the first time they had managed a data-driven tender on such a large scale, requiring a secure, auditable, and easily accessible platform. The project involved collaborating with external parties while meeting stringent privacy, legal, and record-keeping requirements.

#### The Challenge

Before engaging with Kapish, the organisation was tasked with managing a major tender involving a large amount of sensitive data that needed to be securely shared with external parties for a set period. Previously, such data was only available in hard copy, and access was granted through in-person appointments.

This posed several challenges:

- **Security Requirements:** The company needed a platform that could meet their legal, procurement, and privacy requirements while also supporting external access.
- **Long-Term Solution:** This was the first time the company had to implement a process at this scale, requiring a solution that would not only support the immediate tender process but also fit long-term information management needs in SharePoint.
- **Manual Processes:** The existing methods were slow and manual, making it difficult to collaborate effectively with external stakeholders.

These challenges were impacting business operations by creating bottlenecks in data sharing and management, especially in a highly regulated environment.

## The Solution



Kapish's K365 Cloud solution was chosen to address these challenges. K365 Cloud was identified as the ideal platform to:

- **Enable External Collaboration:** K365 Cloud allowed the organisation to securely share large volumes of tender data with external stakeholders while adhering to legal and privacy requirements.
- **Integrate with Content Manager and SharePoint:** The solution not only addressed the immediate needs of the tender but also provided long-term integration with the organisation's existing systems; Content Manager and SharePoint.
- **Scalability:** The platform's ability to scale and evolve with the company's future needs made it an attractive option for the long-term, supporting the organisation's ongoing information management strategies.



K365 Cloud allowed for the short-term use of for the tender but also enabled long term use for our ongoing records management process of having records in both Content Manager and Microsoft SharePoint environments. K365 Cloud offered the long-term solution to grow with our business as our needs change in this every moving world of information management"

Rachel Carter

Central Highlands Water

## Implementation

The implementation of K365 Cloud was smooth, with Kapish's team providing outstanding support. The organisation had specific security requirements that initially reduced some of the platform's functionality. The challenges were addressed collaboratively, and a solution was found that met both the cybersecurity team's needs and the requirements of the broader organisation.

- **Support and Communication:** The Kapish team maintained excellent communication throughout the process, responding promptly to any queries and working outside of regular hours to ensure that deadlines were met.
- **Customisation:** One standout feature was the ability to automatically clean up the SharePoint site after 7 days, a function that was tailored to the company's internal processes.

“ The team were great to deal with we had a complex request, and they were able to meet all our requirements while maintaining an environment that met out cyber team's security needs”

Rachel Carter  
Central Highlands Water

## Outcome

Since the implementation of K365 Cloud, the company has seen significant improvements in data management for tender processes and beyond. Key results include:

- **Improved Efficiency:** The data room process for the major tender became smoother, with greater efficiency in managing and sharing data with external stakeholders.
- **Increased Automation:** The company has identified additional use cases for K365 Cloud, including Emergency Management Events and internal and external process management, reducing the need for manual interventions.
- **Future Scalability:** The organisation now has a scalable solution in place to manage large volumes of data and records without extensive staff involvement. This positions them well for the future, enabling them to grow their information management capabilities as needed.

“ We saw an increase in the efficiency of processing this large data room, can see the benefits for our future planned K365 Cloud request types to increase the record keeping without staff intervention as they move to SharePoint sites to work collaboratively

Rachel Carter  
Central Highlands Water

The solution has successfully met the initial goals, providing a secure, auditable, and easily accessible platform for managing large volumes of sensitive data.

## Objective

Enable secure external access to Tender documents stored in SharePoint Sites, as well as provide a long-term solution for managing SharePoint documents to meet Information Management requirements while empowering user collaboration.

## Challenge

- Meet strict Cyber-Security requirements
- Integrate with Content Manager

## Problem

- Manual process for sharing Hardcopy data
- Providing secure external access to tender documents
- Managing SharePoint sites and documents to meet compliance rules.

“We needed a secure location that met all our record keeping, privacy, legal and procurement requirements while enabling external access”

Rachel Carter  
Central Highlands Water

## Solution

Kapish K365 Cloud for provisioning and Governance of M365 Sites and automatic integration with Content Manager.

“K365 Cloud was identified as being the product that could meet these short-term requirements as well as long-term Content Manager and SharePoint integration”

Rachel Carter  
Central Highlands Water

## Results

- Improved tender process efficiency
- Secure access to SharePoint documents for external parties
- Streamlined SharePoint site request and approval process
- Automated Integration with Content Manager
- Enabled user workspace collaboration and reduction of manual recordkeeping responsibilities
- Compliant and efficient Information Management and Governance of M365 Sites.

“We were able to meet our requirements and get this functioning affectively before the tender was due to go to market”

Rachel Carter  
Central Highlands Water

## Benefits

- **Provision M365 Sites:** Provisioning of new M365 Sites with automatic governance rules applied.
- **Improved Efficiency:** Quicker secure access to tender documents, leading to time savings.
- **Enable Secure Access:** meet security requirements while enabling access to sensitive documents.
- **User-Friendly Interface:** The interface was designed to be intuitive and simple to use.
- **Compliance:** Integration with Content Manager to leverage record and archiving control

## Conclusion

Kapish's K365 Cloud solution has had a positive impact on the organisation's ability to securely manage and share large volumes of data for their major tender. The seamless integration with Content Manager and SharePoint, along with the collaborative support from Kapish's team, has enabled the client to meet both their short-term and long-term business needs. The client has expressed their willingness to continue using Kapish's solutions for future projects and has already identified additional use cases for K365 Cloud.

“ K365 Cloud made for a smoother data room process for the major tender. We have also gone on to identify options to use K365 Cloud which includes Emergency Management Events, yearly folder creation for internal and external processes”

Rachel Carter  
Central Highlands Water

“ This is the 3rd product we use from Kapish, the team are always prompt and helpful when we need support for any of our Kapish products”

Rachel Carter  
Central Highlands Water