



Preferred

SharePoint
Business Applications



Hidden Treasures

Uncover the real value of Office 365 and Dynamics



Interestingly named?! (Typical Microsoft)

Create and Capture

Intelligent Data Usage

Faster Business Process Cycles

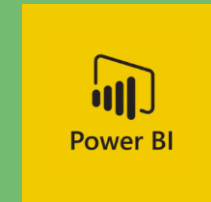
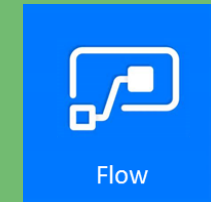
Aggregation of Multiple Data Sources

Integration with Other Services

Better Process Automation



Microsoft's Power Platform



Analyse. Act. Automate





Solution built on SharePoint

From booking and tracking to approval and installation

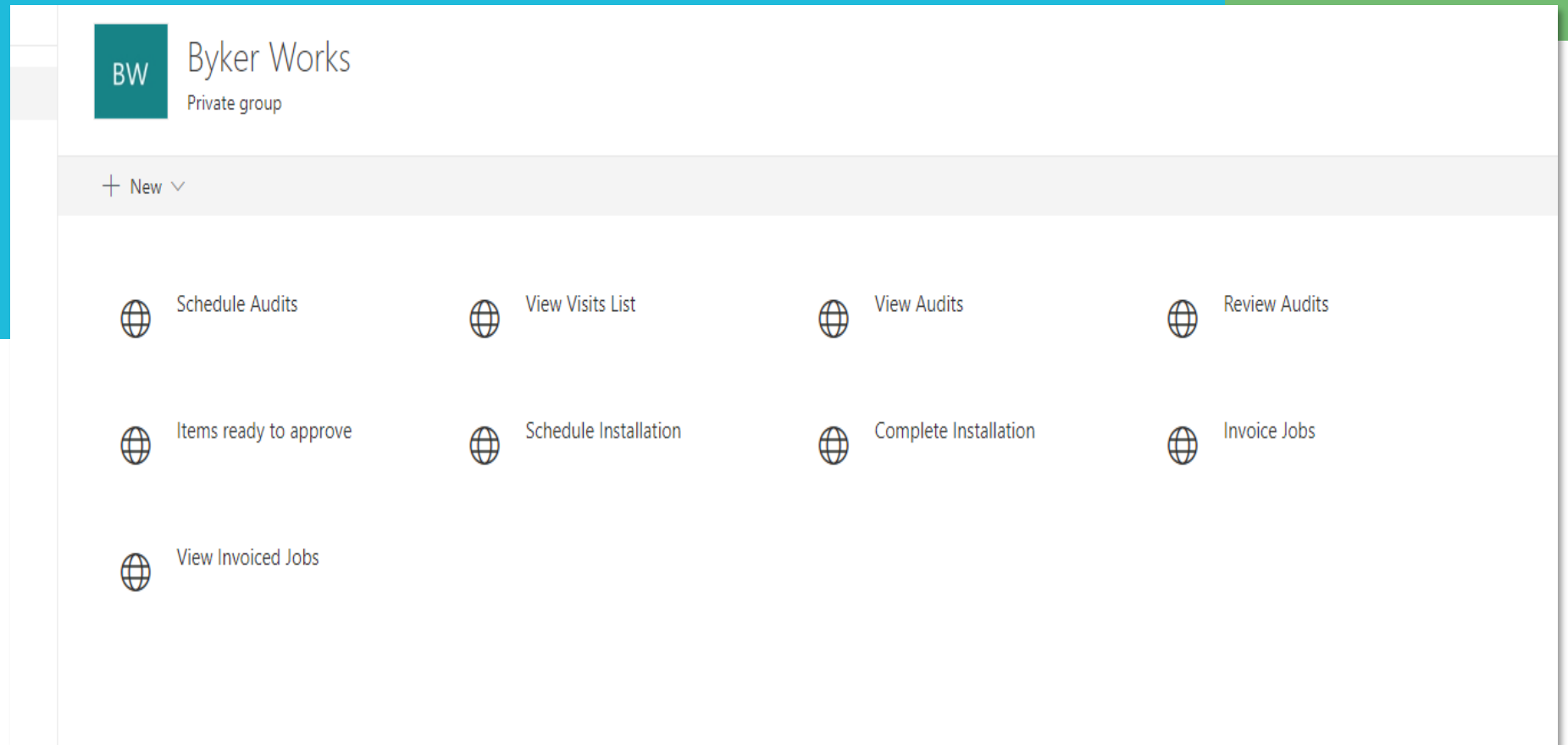
Managed using a series of PowerApp forms, Flow workflows, SharePoint lists and Power BI dashboards

Audit of over 2,000 properties to determine whether the heating and domestic water systems and controls needed improving or even replacing



SharePoint lists were used as the data store

Ensured the data was secure and met relevant compliance requirements



PowerApps allowed mobile workers to capture audit information.

Flow triggered different stages of the process dependent on data captured

Menu

Scheduler

Manage Initial Visits Schedule Installation Complete Installation Re-schedule Audit Re-schedule Installation

Engineer

View Audits Cost Review Invoice Jobs Void a Visit

Manager **Byker Trust**

Review Audits Approvals

Manage Audits

NO.59, AYTON RISE	Address
NO.36, COMMERCIAL ROAD	Tenant Name
NO.38, COMMERCIAL ROAD	Home Telephone Number
NO.01, OBAN GARDENS	Mobile
NO.31, ST PETERS ROAD	Survey Date
NO.35, ST PETERS ROAD	5/1/2018
NO.15, HOULET GARTH	Survey Notes
NO.04, RABY CROSS	7 Day Letter
NO.06, RABY CROSS	NO.59, AYTON RISE
NO.10, RABY CROSS	
NO.12, RABY CROSS	

Cancel Audit Start Audit

General Works

Remove existing 2 port motorised control valve on pipe connection to heating circuit.	<input type="checkbox"/> No
Install 22mm dia pipeline mounted filter ballvalve	<input type="checkbox"/> No
Install 15mm dia pipe insulation to exposed pipework in tank cupboard	<input type="checkbox"/> No
Electrical - Remove 2 port valve actuator	<input type="checkbox"/> No
Electrical - Remove Heating Programmer.	<input type="checkbox"/> No
Electrical - Remove Room Thermostat	<input type="checkbox"/> No
Re-use existing cable between DB and Cupboard retained.	<input type="checkbox"/> No
Isolate and Drain heating within flat. Allow for purging and refilling on completion.	<input type="checkbox"/> No
Re-use existing cable cable between cupboard and programmable room	<input type="checkbox"/> ..

Radiator Replacement

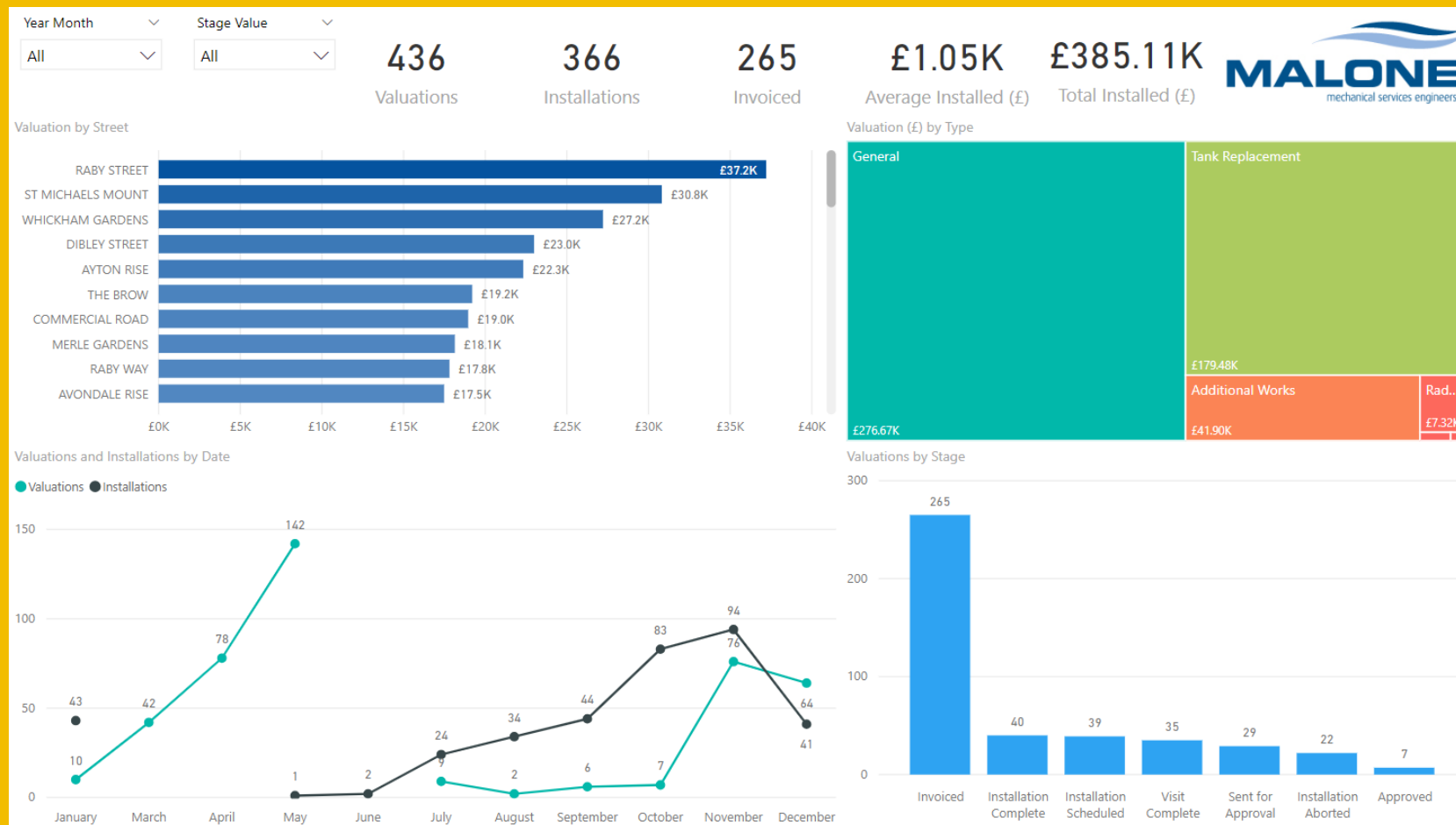
Provide New Lochshield DRV to existing Radiator ☐ No Qty:

Do the radiators require replacing ☒ Yes

Provide new TRV to existing Radiator ☒ Yes Qty:

Qty:	<input type="text"/>
Qty:	<input type="text"/>
Qty:	<input type="text"/>
Qty:	<input type="text"/>
Qty:	<input type="text"/>
Qty:	<input type="text"/>
Qty:	<input type="text"/>
Qty:	<input type="text"/>





PowerBi dashboards show audit stage, progress and completions, along with cost analysis





"We are almost at the point of achieving the holy grail of a 'paperless office' on this project."

George, IT Manager, H. Malone and Sons



Replacement of
paper-based tenant
on-boarding process
with prompts, gated
steps and complete
documentation

Phillip Coulson

Trafford Housing Trust - Tenancy Interviews Home

Please use the buttons below to start the Tenancy Interviews process.

62 All Tenancy	
0 Withdrawn	20 Under Offer
0 Let	0 Assessment
42 Accepted	0 Declined

Prepare

Search for a new tenancy record and complete all of the interview preparation tasks before booking the interview with the client.

Interview


Present all of the information collated in the preparation stage and complete the final forms with the client at an interview.

Complete

Finalise the form information, update open housing to complete the interview process.

Record Officer Signature

Click here to record signature for tenancy sign off's.



WORKING
SMARTER



Microsoft

Preferred

SharePoint
Business Applications



Integrated with the HMS to pull through core tenant and property details

Guides the Housing Officer through each stage of the process

Search for a Tenancy Offer - Prepare

Use the form below to search for the tenancy.

Please enter a summary of the offer details.

62 All Tenancy

0 Withdrawn 20 Under Offer

0 Let 0 Assessment

42 Accepted 0 Declined

THiQ TRAFFORD HOUSING TRUST

Offer Ref : 9033

Full Name : [Text Box]

Offer Address : [Text Box]

Offer Category: Fixed Term Tenancy

Offer Type: Fixed Term Starter Tenancy

Offer Status: Accepted

Start Date : 25/02/2019

View Documents

THiQ TRAFFORD HOUSING TRUST

Tenancy Document

The following tasks must be completed at the interview.

- ☐ Discuss the information pack [\(use this link to open the Information pack\)](#)
- ☐ Explain where stop tap, gas and electricity meter are
- ☐ Present Decorating Voucher
- ☐ Read out GDPR Core to the tenant [\(open GDPR Statement in a new window\)](#)
- ☐ Complete Core Form
- ☐ Direct Debit form complete
- ☐ Complete the Fire Safety Request form
- ☐ Share the Repairs how to booklet - optional
- ☐ Share the Empty Properties Guide - optional
- ☐ Review Energy Performance Certificate
- ☐ Complete the Tenancy Form [\(open a sample tenancy document\)](#)
- ☐ HB Change of Circumstances Form
- ☐ Is a Termination Form required?
- ☐ Photograph of Tenant has been taken

Decorating Vouchers

Book Appointment

Check Manual Documentation Finish

If the VOID information to be included in the Information pack [\(link access the EPC form downloads\)](#)

he stop tap.

he gas meter.

the electricity meter.

Please provide details of any items the tenant will be taking with them.

Not Applicable

Back Next





Preferred

SharePoint
Business Applications



Dynamic Outlook Calendar lookup

Offer Details Void Details Decorating Vouchers Book Appointment Finish

Property Details Tenancy Status Check Manual Documentation

Arrange interview and Book Room

Appointment Schedule

Time

12:00 PM
All attendees available

1:00 PM
All attendees available

2:00 PM

Location

No Room Required

Old Trafford Offices

Stretford Offices

Person Ref : 166178
Full Name :
D.O.B : 11/03/1991
Telephone :
Mobile :
E-mail : Not on Record

Offered Address :
Stretford
Manchester
M32 9LU
Offered Place ref. 0126401075

Offered Place ref. 0126401075

Appointment Notes

New Tenancy Interview regarding Manchester M32 9LU.

*Date 25/02/2019

*Duration 1 hour(s)



Preferred

SharePoint
Business Applications



Automated document generation and integration with SharePoint for EDM/ERM, providing a fully integrated end to end solution built on Office 365

Post Interview Tasks

Please complete the following post-interview tasks.

Tenancy Document

Offer Ref : 9033
Full Name :
Offer Address :
Sale
Manchester
M33 2UW
Offer Category: Fixed Term Tenancy
Offer Type: Fixed Term Starter Tenancy
Offer Status: Accepted
Start Date : 25/02/2019

[View Documents](#)

☐ Keys Handed Over
☐ Update Open Housing with the
☐ Advise Client of My Account set

Complete Interview

Tenancy Document

Offer Ref : 9033
Full Name :
Offer Address :
Sale
Manchester
M33 2UW
Offer Category: Fixed Term Tenancy
Offer Type: Fixed Term Starter Tenancy
Offer Status: Accepted
Start Date : 25/02/2019

Please review the charges detailed below with the client and collect their signature.

Full Name :	<input type="text"/>	Weekly Rent :	£ 105.39
Start Date :	25/02/2019	Service Charges :	£ .23
Offer Address :	<input type="text"/>	Former Occupancy Debt (payment) :	£ 0.00
Sale		Total Amount payable per week :	£ 105.62
Manchester			
M33 2UW			

☐ Is this a joint tenancy ?

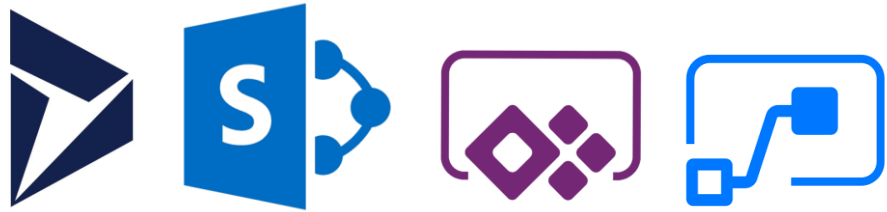
[View Documents](#)

Please click here to review the charges



"The expertise of team TSG has been invaluable in translating our process design into reality, integrating Office 365 tools with our housing management system to transform an unwieldy and inconsistent paper-based process into a fully digital solution. We're certainly on track to achieve our target of 50% savings in time for onboarding new tenants."

Julian, Director of Transformation, Trafford Housing Trust



FULLY INTEGRATED SOLUTION

Linked with Dynamics NAV to manage job-cards for 150 teams across the UK and capture critical completed documentation

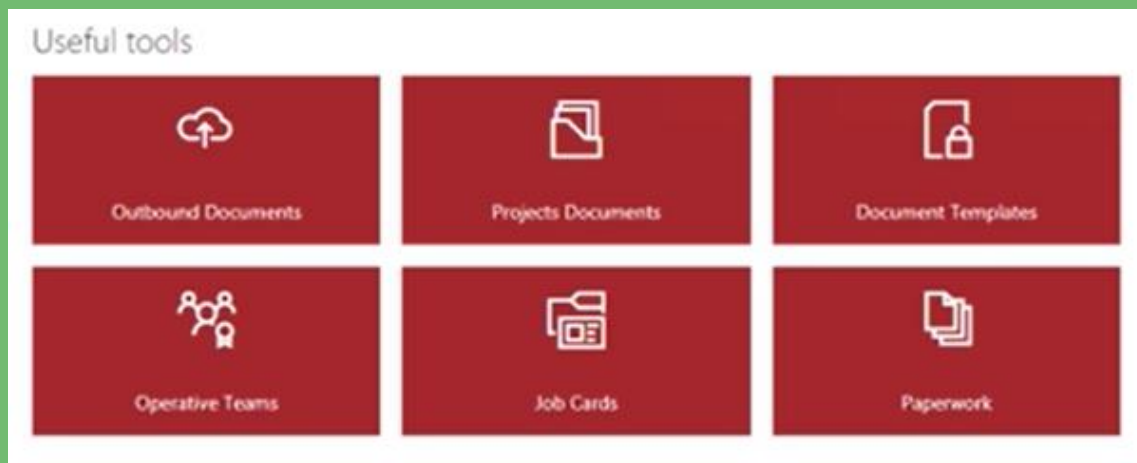
Massive savings on postage

Massive savings on labour

Impact on accuracy and regulatory paperwork

Impact on invoicing and cashflow

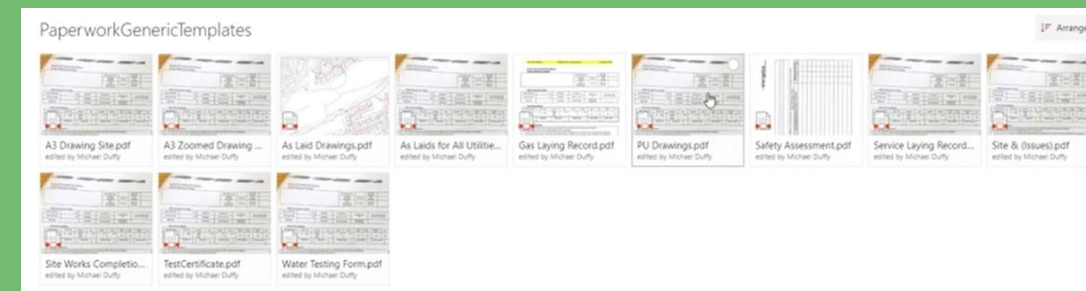




+ New Quick edit Export to Excel Flow PowerApps All Items								
010017.0004EQIPLOG	010017.0004	Maintainable Equipment MU Log	ELECJOINT	EQUIPLOG	0	0	0	0
010017.0004SITECOMP	010017.0004	Site Works Completion Form	ELECJOINT	SITECOMP	0	0	0	0
010017.0004TESTNEWCAB	010017.0004	Declaration of test results for U2 new cable route	ELECJOINT	TESTNEWCAB	0	0	0	0
010017.0004SITEISSUES	010017.0004	Site Issues causing failed/incomplete Works	ELECJOINT	SITEISSUES	0	0	0	0
010017.0004ASLADALL	010017.0004	As Laid for All Utilities	ELECJOINT	ASLADALL	0	0	0	0
010017.0004RISKASMT	010017.0004	Risk Assessment	ELECJOINT	RISKASMT	0	0	0	0
010017.0004ASLADSTCH	010017.0004	As laid drawing / Sketch Card	ELECJOINT	ASLADSTCH	0	1	0	0
010017.0004DRAWPU	010017.0004	PU Drawings	ELECJOINT	DRAWPU	0	0	0	0

Job-cards created in Dynamics NAV
and synced with SharePoint

Standard document types held in
library and pulled through for each job



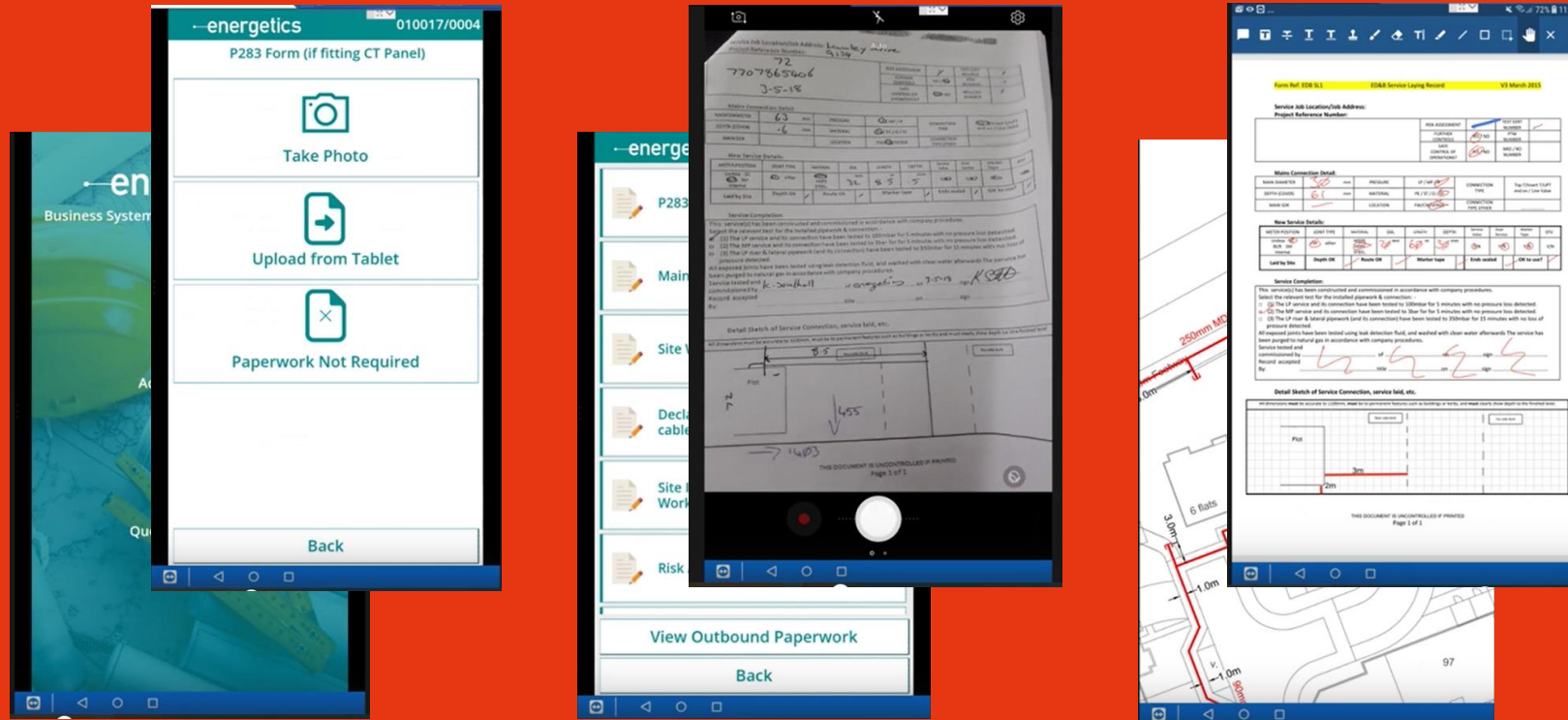
energetics



Teams using PowerApp on tablets

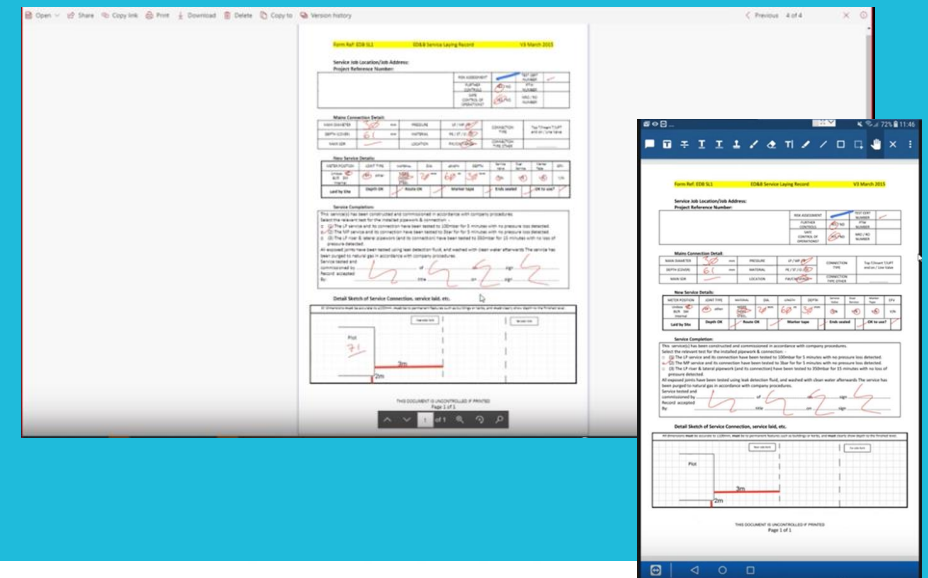
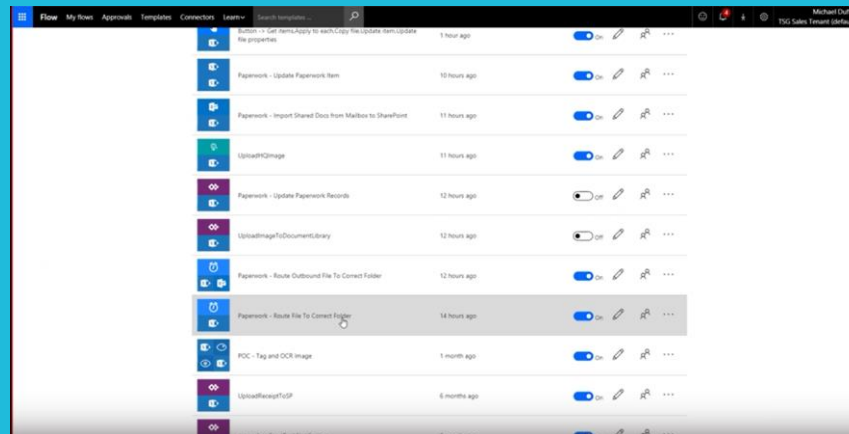
Linked with email address to sync up relevant job-cards

Shares and captures key information relating to jobs



energetics

Information captured triggers Microsoft Flow to load documents into relevant libraries based on metadata
Can be direct through PowerApp or via email



Home	Project Docume... > 010017 > 0004								
Conversations									
Documents									
Notebook									
Pages									
EVAL_JobCards									
Nav_Paperwork									
Site contents									
	Name	ProjectID	JobCardID	DocumentType	File Size	PaperworkStatus	PaperworkComment	Created	Paperwork
	Outbound							Yesterday at 22:36	
	file_7649d301-d0e7-4251-ad5...	010017	0004	Maintainable Equipment MU Log	2.50 MB	Pending		8 minutes ago	0
	file_b5f7a677-194d-4dfe-8c14...	010017	0004	9283 Form (if fitting CT Panel)	579 bytes	Not Required		11 minutes ago	0
	010017-0004-SITECOMP (6) (1...	010017	0004	Site Works Completion Form	230 KB	Pending		A few seconds ago	0



energetics

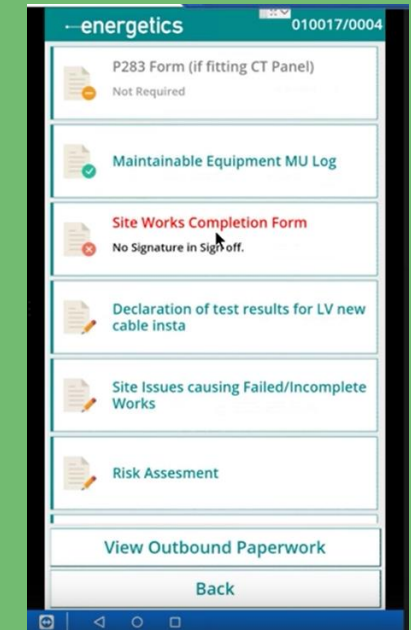
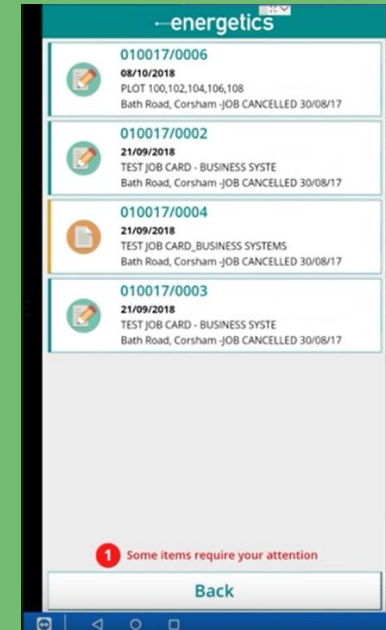
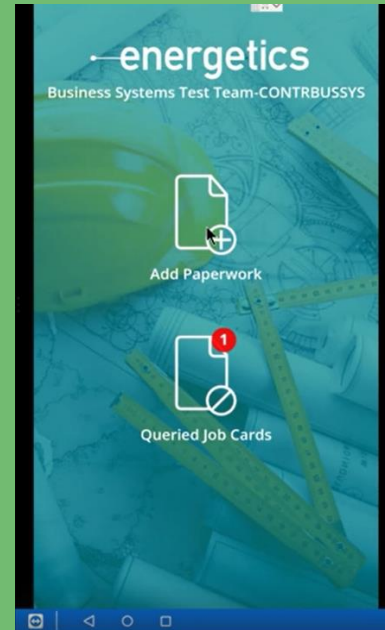


Back office teams monitor and verify captured documents

Further requirements synced via the PowerApp until job is marked complete

✓	✗	📄	Name	ProjectID	JobCardID	DocumentType	File Size	PaperworkStatus	PaperworkComment	Created	Paperwork	PaperworkType	Relocated	+
			Outbound											
			file_7f49c301-d0e7-4251-a069-9a9380219d7	010017	0004	Maintainable Equipment MU Log	2558 KB	Approved		yesterday at 22:36		EQUIPLOG	Yes	
			file_b5f7a677-194d-4dfe-8c14-319333b16ac2	010017	0004	P283 Form (if fitting CT Panel)	1 KB	Not Required		25 minutes ago	0	CTMETERCHK	Yes	
			file_2a52e54d-9e52-4fac-8ac8-ce974c1f43fa	010017	0004	Site Works Completion Form	2592 KB	Approved		About a minute ago	1	SITECOMP	Yes	
			010017-0004-SITECOMP (8) (1)	010017	0004	Site Works Completion Form	230 KB	Superseded	No Signature in Sign off.	14 minutes ago		SITECOMP	Yes	

File Size	PaperworkStatus	PaperworkComment	Created
nt MU Log	2.50 MB	✓ Approved	15 min
T Panel)	579 bytes	→ Not Required	18 min
Form	230 KB	⊕ In Query	7 min





Energetics spotted by Microsoft telemetry and named as a 'Firestarter' on the basis of their O365 consumption data





"The digital job management solution has delivered significant back office savings in time, resources and costs. However, what's been more satisfying is the response of our team managers and the impacts they've reported on their daily operations."

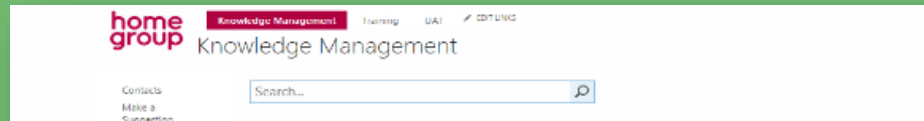
Maureen, Business Systems Associate Director, Energetics




Supporting Home Group on their 'digital first' journey for some time

Award winning knowledge management solution guiding customer services through repair calls

Huge impact on training and error rate

A screenshot of the Home Group Knowledge Management (KMT) web application. The interface features a white header with the 'home group' logo on the left and navigation links for 'Knowledge Management', 'Training', 'UAT', and 'CDT UAT' on the right. Below the header, the main content area includes a 'Search...' input field with a magnifying glass icon, a 'What's New on KMT?' link, and a sidebar with links for 'Contacts', 'Make a Suggestion', and 'Weather Warnings'.



☐ View and Test / Fault / Contractor Damage

☐ Was the customer entitled to get up the fence or gate removed?

☐ No

☐ Was the problem seen as a health & safety risk or would it be classed as an emergency?

☐ Yes

☐ Is there on the other side of the fence or gate a

Guided Help : Fences and Gates

Q

Has the problem occurred?

☐ View and Test / Fault / Contractor Damage
 ☐ Customer Damage
 ☐ Criminal Damage

Q

Has the customer modified or put up the fence or gate themselves?

☐ Yes
 ☐ No

Q

Does the problem pose a health & safety risk or would it be classed as an emergency?

☐ Yes
 ☐ No

Q

Is there on the other side of the fence or gate? If it's a property, check the address on our systems to see if it belongs to Home Group.

☐ Home Group property
 ☐ Public footpath
 ☐ Private property or unknown ownership

Solutions


Log a SECH for General Needs.
Log a PPP for Care and Support.
Log an EXCL for Care and Support properties covered by Neams North Unit.


Log a SORH if this is due to wear and tear. [Click here for suggested SORH advice.](#)
Log a RECA if this is due to a fault or contractor damage or if the fence / gate has had a previous job logged for the same reason.

#apeth

Q What type of fence is it?

- ☐ Panel
- ☒ Chain Link
- ☐ Boarded
- ☐ Post and Rail
- ☐ Hit and Miss
- ☐ Unknown

A photograph of a chain-link fence. The fence is made of a diamond-shaped metal mesh supported by vertical posts. It runs across the middle of the frame. Behind the fence is a grassy field with some trees in the background. The ground in the foreground is dirt and gravel.



Knowledge Management


[Training](#)
[QA](#)
[CDT LINK](#)

[Contacts](#)
[Make a Suggestion](#)
[Weather Warnings](#)
[Hotspots - Repairs](#)
[No slot?](#)
[Chaser](#)
[Aux Codes](#)
[CSC Bureau](#)
[SSA Sharepoint](#)
[Repairs - Back to Basics](#)
[Complaints and Compliments](#)
[Welfare Reform](#)
[National Youth Action Survey](#)

[RTI Rules](#)





















What's New on KMT?

News and Updates



Contractor Contacts Quick Links

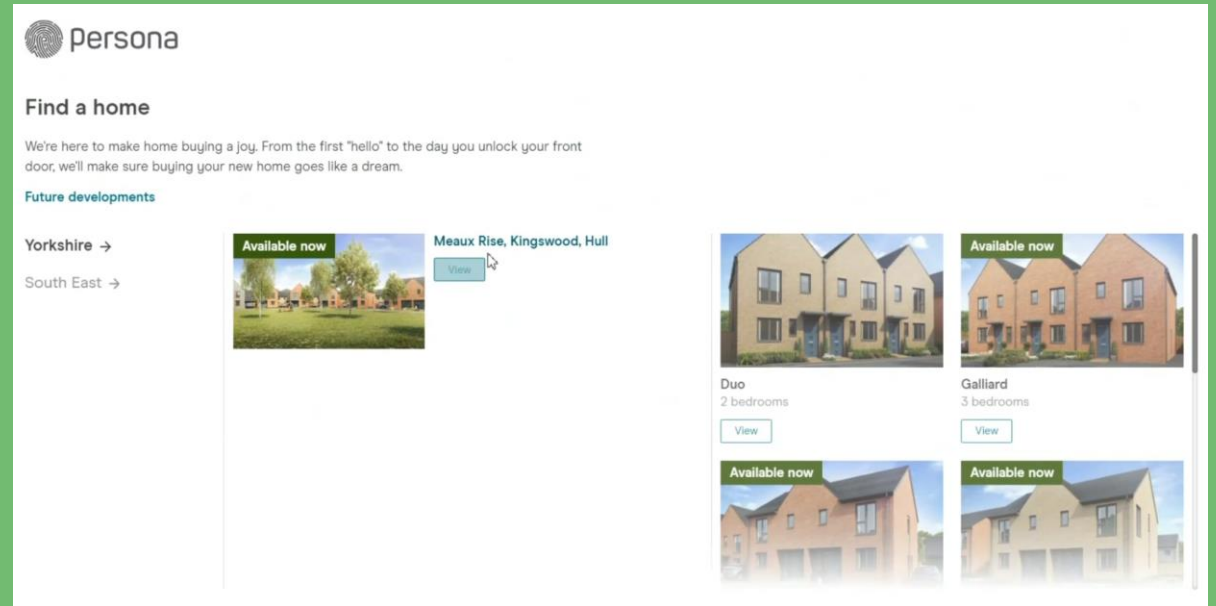
[News \(512/2\)](#)
[Roofers \(17/4\)](#)
[Wireded Dunes Central \(514/3\)](#)
[Wireded Dunes North West \(514/3\)](#)
[Moors South West \(514/4\)](#)
[responsive and gas](#)
[Moors North East \(562/5\)](#)
[emergency - zone 1 - zone 2 - zone 3 - zone 4 - gas \(servicing\) - gas \(servicing letters\) - gas \(repairs\) - periodical electrical testing](#)

 General Enquiries	 Joinery	 Plastering	 Lights, Sockets & Switches	 Electrical Heating	 Alarms and Detectors
 Roofing and Gutters	 Fences and Gates	 Damp	 Doors	 Loose	 WC Seats
 Windows	 Kitchen Worktops and Units	 TV Aerials	 Wall and Floor Tiles	 Brickwork	 Combustion
 Showers	 Drainage and Blockages				



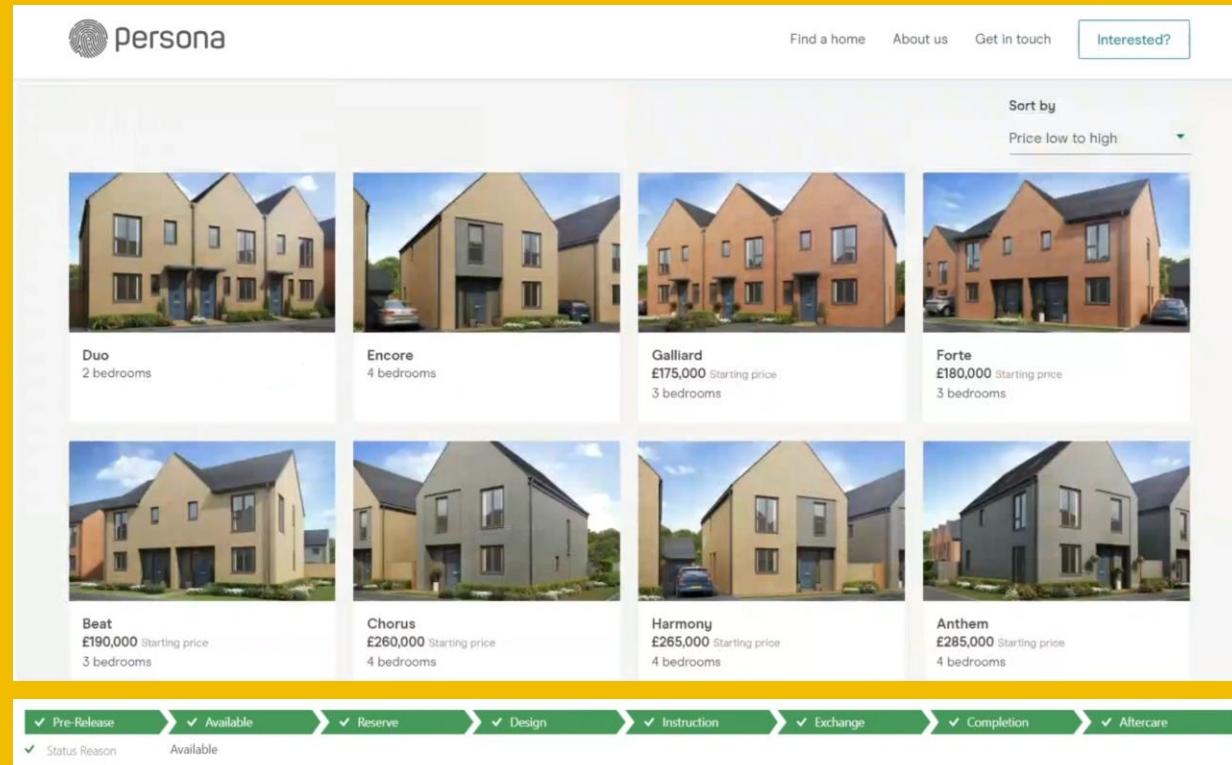
Flexible and agile approach to development

Integration with front end, back office and legacy systems

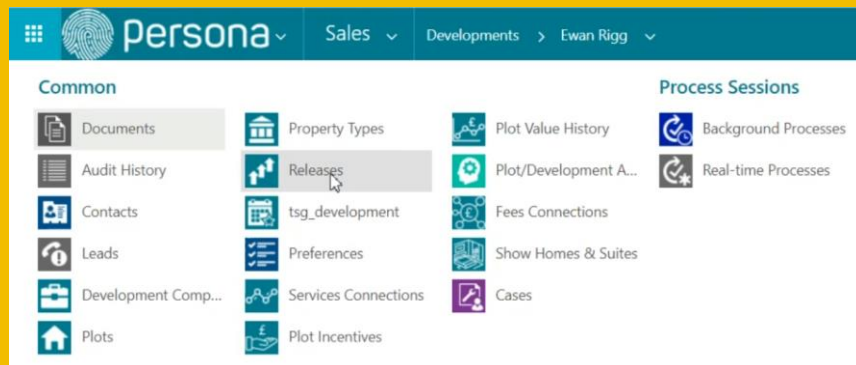


Managing sites,
plots and property
types through
various phases

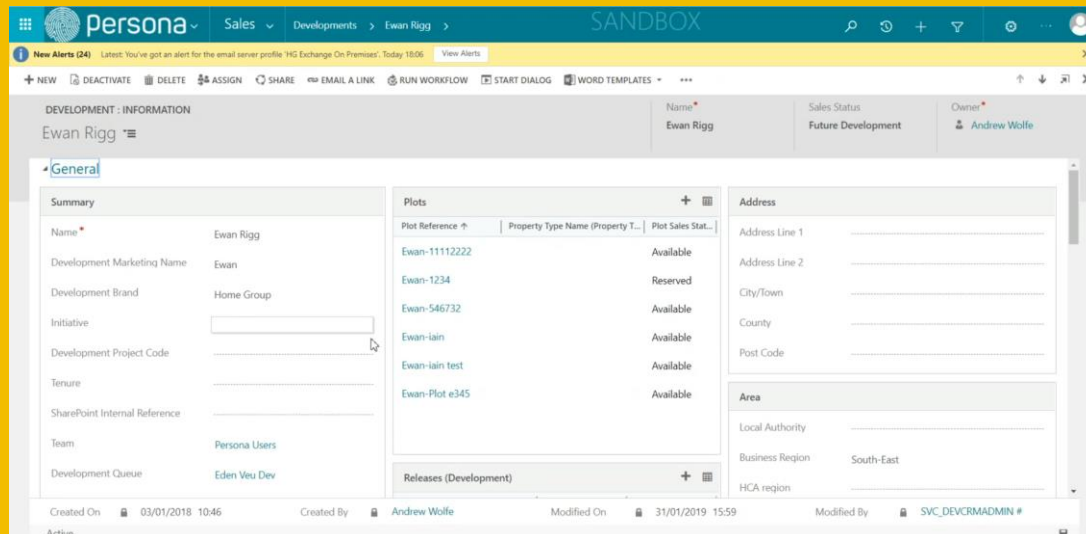
Live information
fed through to
website



The screenshot shows the Persona website's front end. At the top is the Persona logo and navigation links: "Find a home", "About us", "Get in touch", and an "Interested?" button. Below the navigation is a "Sort by" dropdown menu set to "Price low to high". The main content area displays eight property listings in a 2x4 grid. Each listing includes a photograph of the property, a name, and a brief description. The listings are: Duo (2 bedrooms), Encore (4 bedrooms), Galliard (£175,000 Starting price, 3 bedrooms), Forte (£180,000 Starting price, 3 bedrooms), Beat (£190,000 Starting price, 3 bedrooms), Chorus (£260,000 Starting price, 4 bedrooms), Harmony (£265,000 Starting price, 4 bedrooms), and Anthem (£285,000 Starting price, 4 bedrooms). At the bottom of the page is a green progress bar with eight stages: Pre-Release, Available, Reserve, Design, Instruction, Exchange, Completion, and Aftercare. The "Available" stage is currently selected, and a "Status Reason" is visible below it.

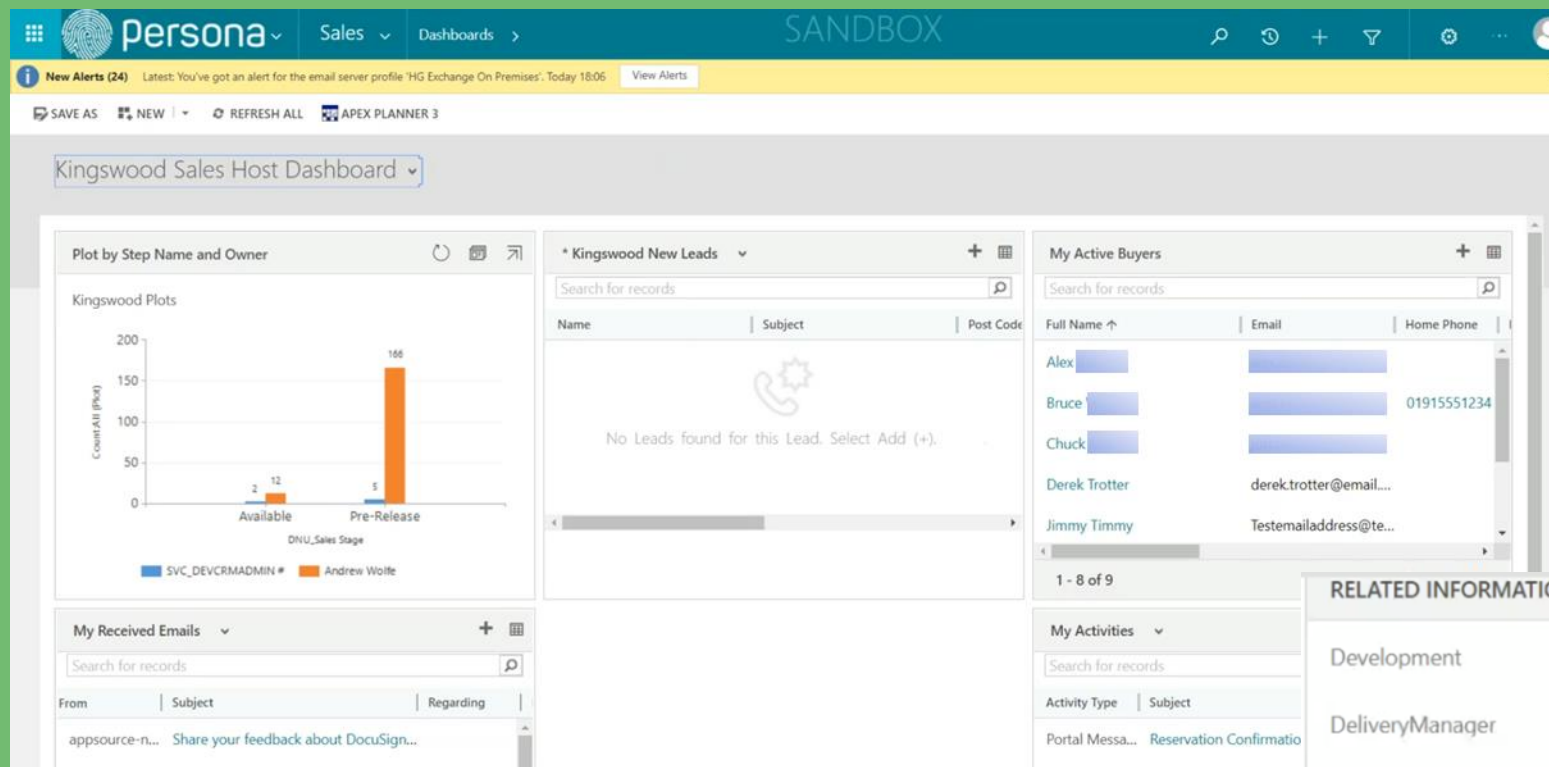


The screenshot shows the Persona website's back end interface. The top navigation bar includes the Persona logo and links for "Sales", "Developments", and "Ewan Rigg". Below the navigation bar is a "Common" section with a grid of icons for various functions: Documents, Audit History, Contacts, Leads, Development Comp..., Plots, Property Types, Releases, tsq_development, Preferences, Services Connections, Plot Incentives, Plot Value History, Plot/Development A..., Fees Connections, Show Homes & Suites, Cases, Background Processes, and Real-time Processes. The "Releases" icon is highlighted with a mouse cursor.



The screenshot shows the Persona website's back end interface, specifically the "DEVELOPMENT: INFORMATION" section for "Ewan Rigg". The top navigation bar includes the Persona logo and links for "Sales", "Developments", and "Ewan Rigg". Below the navigation bar is a "New Alerts (24)" section. The main content area is divided into three tabs: "General", "Plots", and "Address". The "General" tab is active, showing a summary of the development. The "Plots" tab is also visible, showing a list of plots with their reference numbers, property types, and sales status. The "Address" tab is also visible, showing the address details. The "General" tab includes fields for Name, Development Marketing Name, Development Brand, Initiative, Development Project Code, Tenure, SharePoint Internal Reference, Team, and Development Queue. The "Plots" tab includes a table with columns for Plot Reference, Property Type Name, and Plot Sales Status. The "Address" tab includes fields for Address Line 1, Address Line 2, City/Town, County, Post Code, Area, Local Authority, Business Region, and HCA region. The bottom of the page shows the record's creation and modification dates and times, along with the user who created and modified the record.

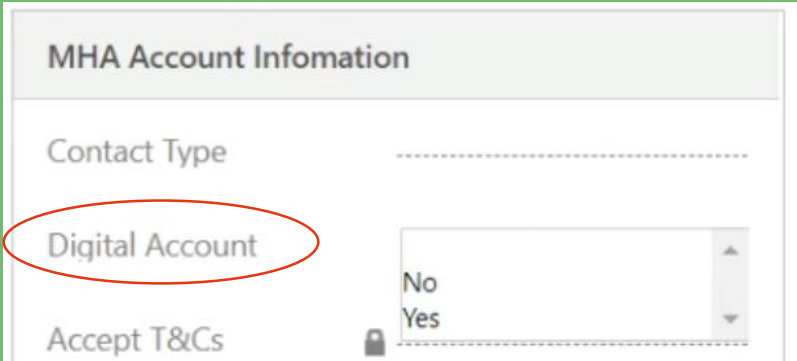
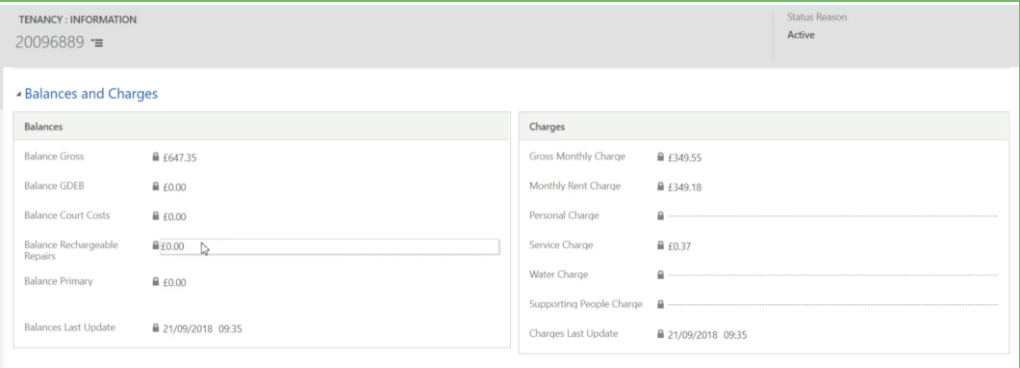
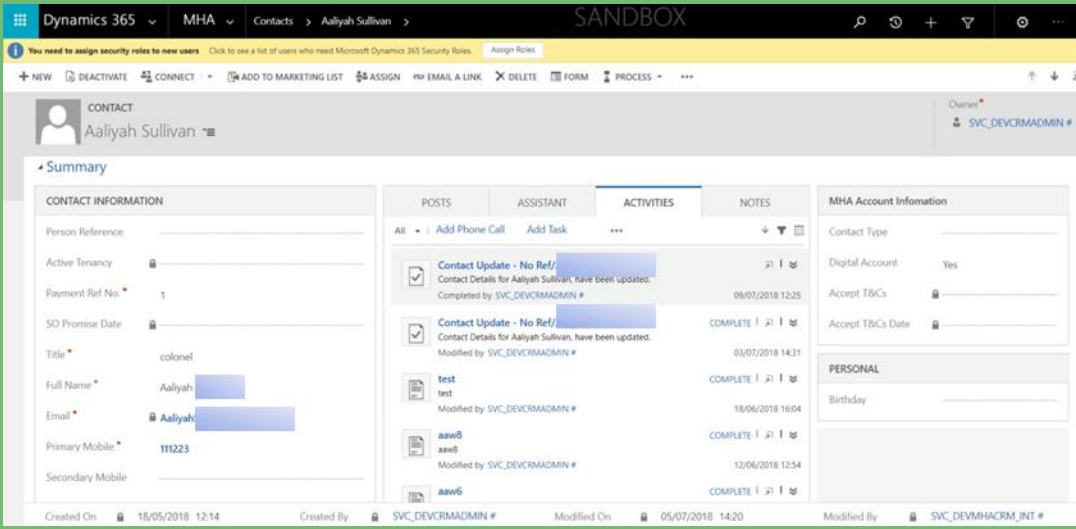
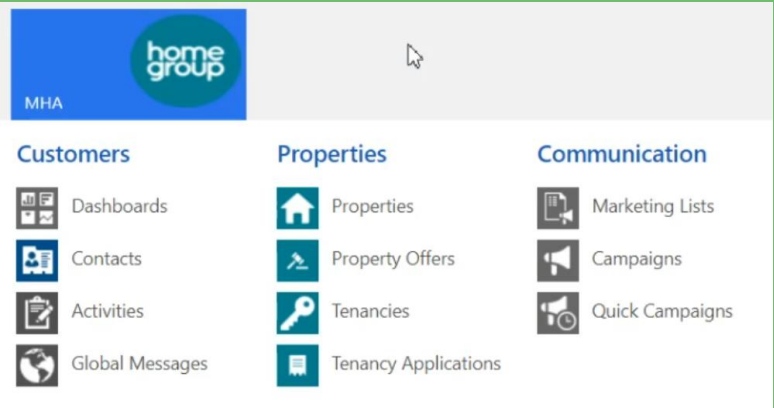




Managing customers through the sales cycle and through to aftercare for defect and case management



My Home Account provides a bridge between legacy HMS and customer portal for those with a digital account





Training Teams Champions
Dual language support
Targeting user adoption

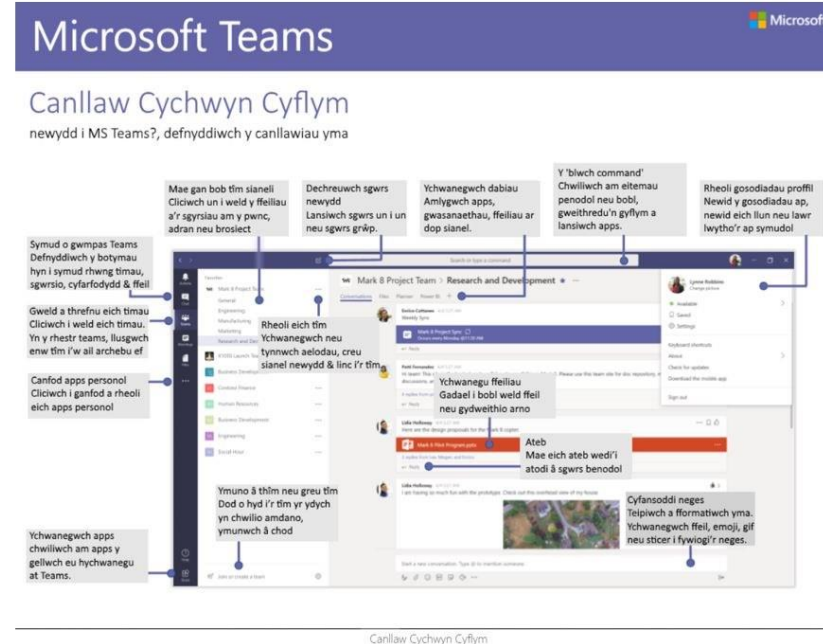
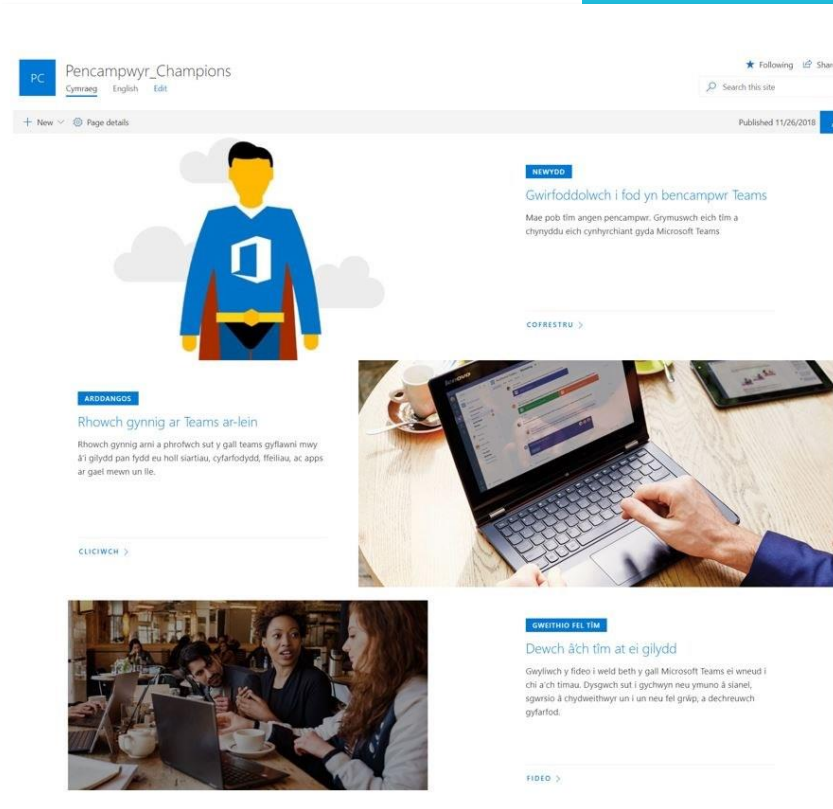
MODERN WORKPLACE

Aiming to stop siloed working habits and ensure the right people are working on projects at the right time





Microsoft Teams



High-level documentation for Microsoft Teams adoption

Best-practice guide and templates for CCG's Microsoft Teams sites



Detailed definition of how structured data should be stored within SharePoint Online

Simple, easy to maintain 'Teams Champions comms site'

Training of 'Teams Champions' as power users



Microsoft Teams





Microsoft Teams

18 month plan to
drive adoption



ENVISION

Develop Microsoft Teams Roadmap for CCG
Governance implemented
Identify & train Microsoft Team champions



x10

Adoption



ON BOARD

Activate Microsoft Team champions
Champions meetings-share success
Create case studies



x20

Adoption



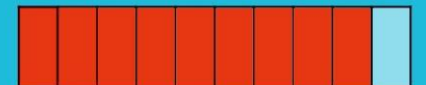
DRIVE VALUE

Increase Microsoft Team champions
Use case studies to drive adoption
Microsoft Teams culture embedded



x30

Adoption



"From the very beginning of the project, TSG fully understood what we wanted to achieve during our initial roll out of Office 365. They fully aligned themselves with our needs, requirements and available resources to partner with us on rolling out Teams across CCG."

They, like us, understand that Teams is currently the best launch window and most beneficial app of the extended Office 365 application stack. They have been a pleasure to work with and I am very pleased with our progress together."

Geraint, Business Systems Manager, CCG



Microsoft Teams

NEW TO MARKET



TSG DOC-CONNECT

Unlock the value of SharePoint as your fully governed, enterprise-grade electronic document management solution



WHY?



More organisations are adopting Office 365 and want to drive maximum value from their investment

Most Non-Microsoft Business Applications (e.g. SAP, Oracle, HMS's etc) have none, or limited SharePoint integration

Organisations now want to automatically store the documents produced from their business applications (e.g. invoices, bill of materials, tenancy documents, gas certificates, etc.) in Office 365, i.e. SharePoint

The challenge is how do we provide a method of integrating such applications to Office 365 in a consistent, reliable manner



WHAT IS?



TSG DOC-CONNECT comprises 3 main components all based on core Microsoft Technologies



Microsoft Azure

Hosts the Vendor (e.g. SAP, Oracle) API elements to which the application routes documents and metadata

SharePoint document library location definitions

Administration, document / routing history & audit information



Microsoft Flow

Custom DOC-CONNECT Flow actions to route documents submitted to the Azure Portal to SharePoint



Office 365

Your Office 365 SharePoint environment architected how you want it, with your EDM, ERM, governance, classification, configuration, etc.

Single integration method for multiple vendors / business applications

100% Microsoft Technology Platform

Low risk

Futureproof as the Microsoft Stack is further developed with additional features

Extend the solution to meet your specific requirements by using the inbuilt Microsoft Flow actions.

Standard Office 365 Compliance Centre features such as classifications, policies, etc. combine with Office 365 SharePoint EDM/ERM features

Flexible, enterprise wide EDRM solution that will benefit from ongoing Microsoft investment in Office 365



GDPR and Data Security



Customer documents or data are not retained.

We remove any data about the documents or the original metadata once a document has been processed in Azure

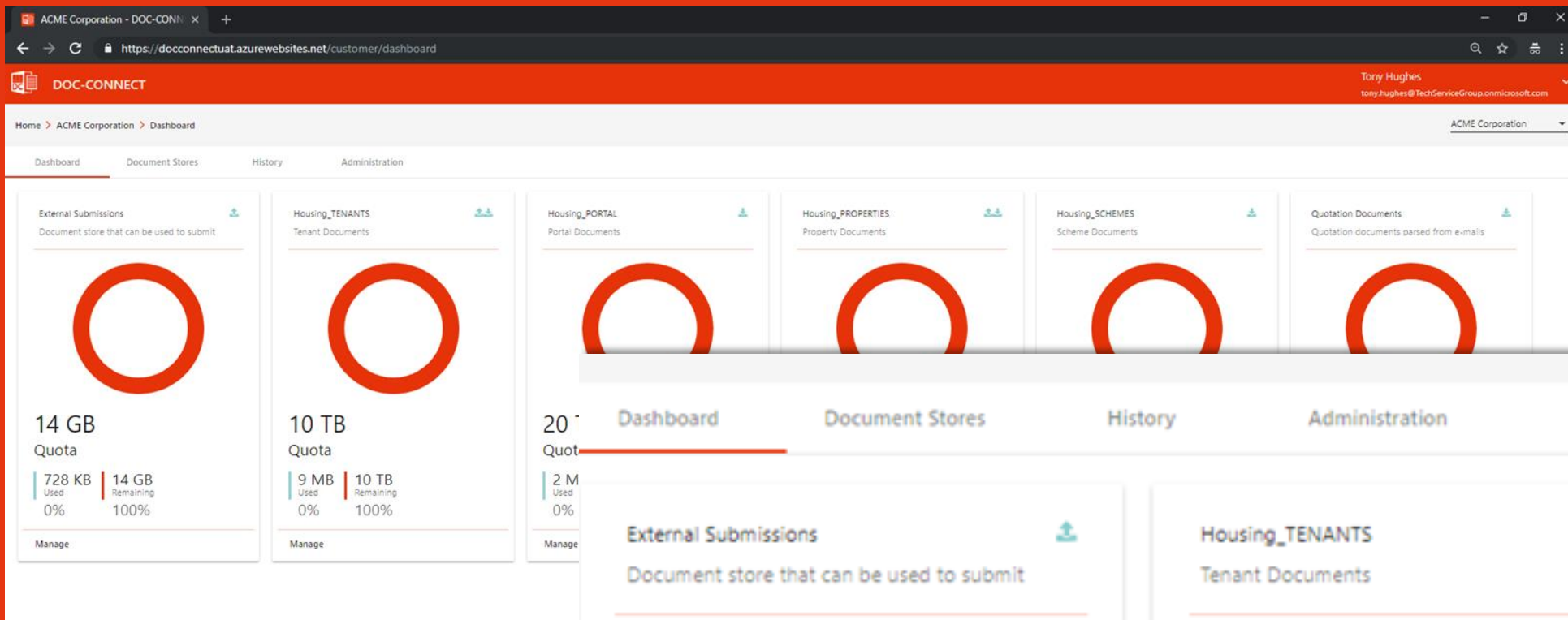
All user provided credentials are stored in Azure Key Vault and removed when the user removes connections

Customer documents, held for a brief period of time during processing, are encrypted at rest in an Azure Blob Storage

Each customer has their own Azure database to hold information about their documents

Telemetry data is anonymised, removing all references to people

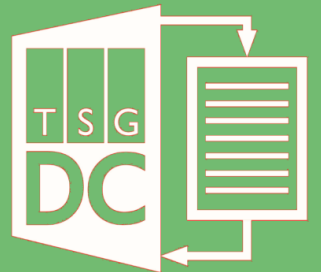
We don't store or use system wide passwords to access the Azure resources within our application

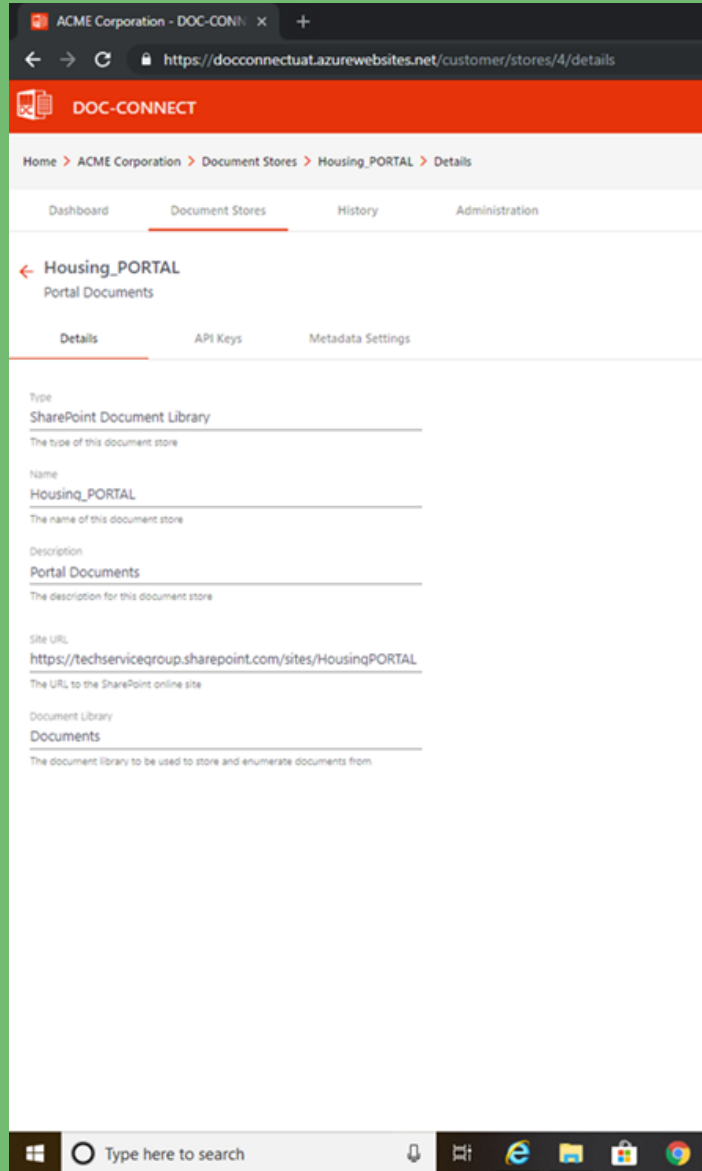


'External Submissions' is the Vendor API to which they submit documents

'Housing TENANTS', 'PORTAL', etc. are SharePoint locations into which documents can be routed via Microsoft Flow and the DOC-CONNECT Flow Actions

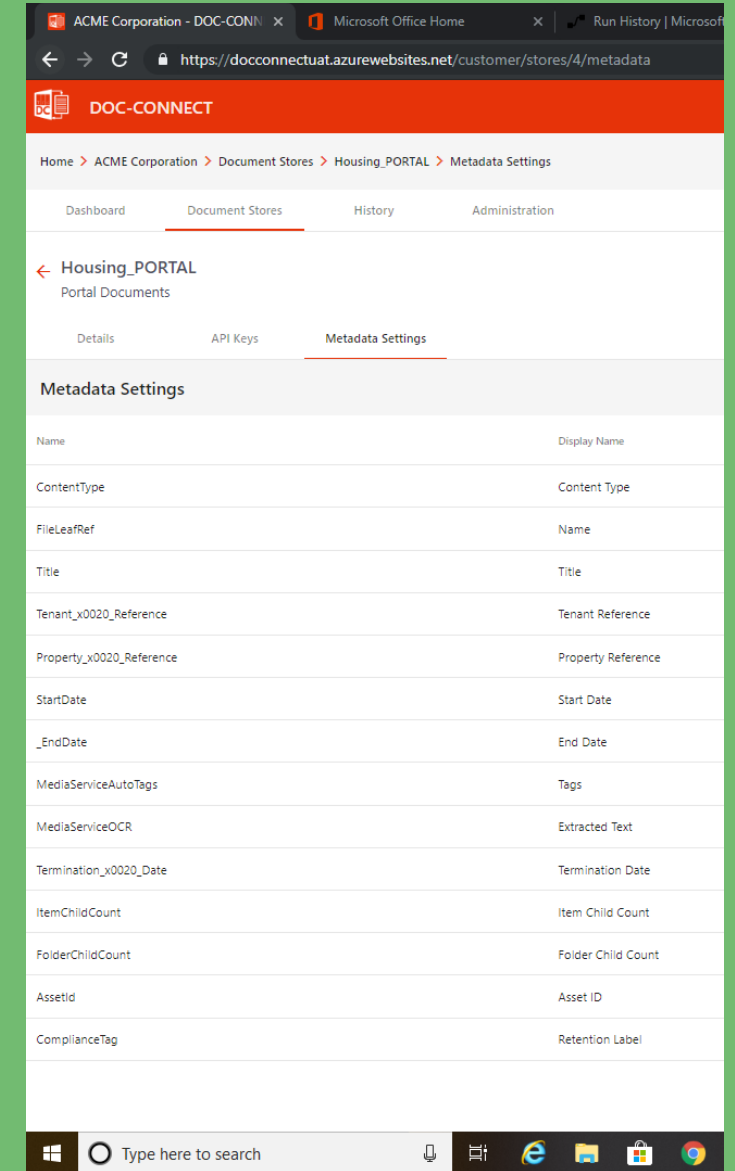
 Microsoft Azure

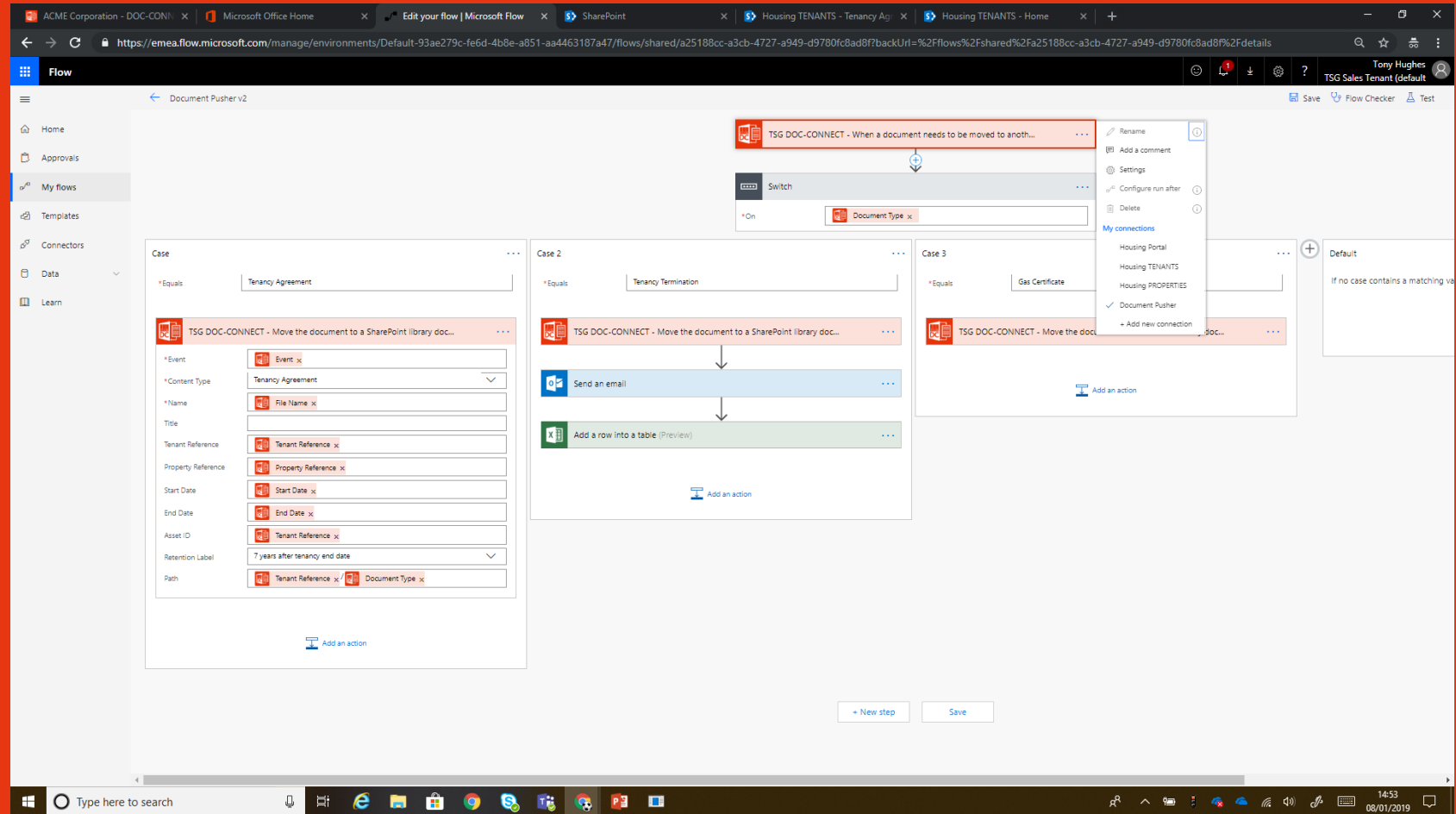




Housing
PORTAL
SharePoint
information

Housing
PORTAL
Metadata
Settings map
to the Vendor
Metadata
provided
for each
document type





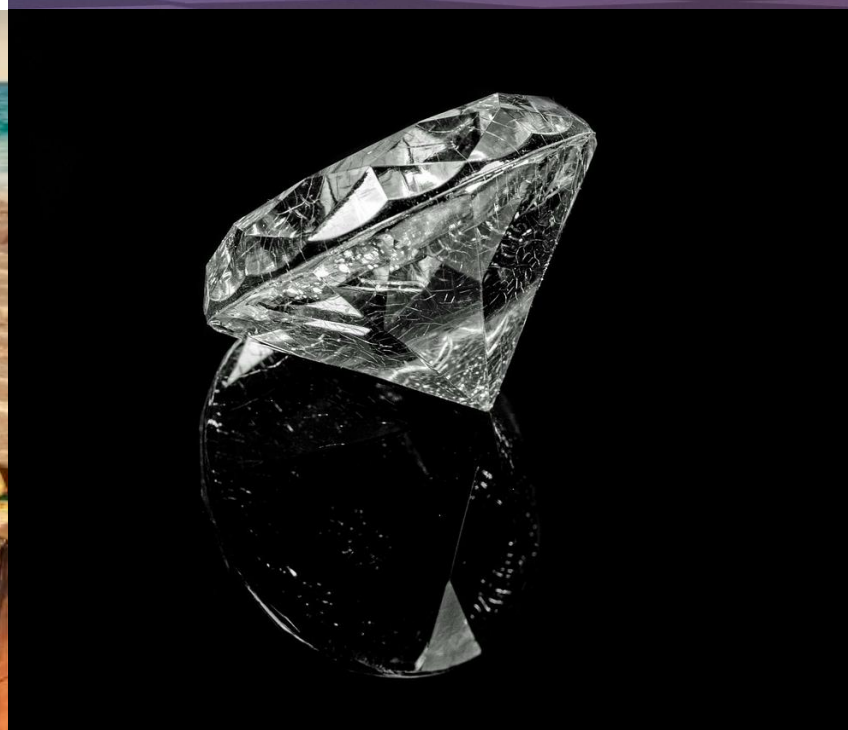
DOC-CONNECT Actions are 100% Microsoft Flow

Route and organise your documents into your EDM/ERM architecture



Hidden Treasures

Uncover the real value of
Office 365 and Dynamics





Hidden Treasures

Uncover the real value of
Office 365 and Dynamics

Create a genuinely
modern workplace by
driving adoption of
Teams for collaboration



Build intelligent
solutions using the
Microsoft Power
Platform



Build integrations
between front end,
back office and legacy
systems using
Dynamics 365



Adopt SharePoint as
your enterprise level
document
management solution



Tackle expenses,
holidays, declaration of
interest, board
governance, audits, task
and case management,
onboarding,.....

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