



## **CASE STUDY**

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# **COMPLIANCE PORTAL**

**WITH MICROSOFT OFFICE 365**

**JUNE 2016**

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# CASE STUDY

## COMPLIANCE PORTAL

With Microsoft Office 365

June 2016

### DESCRIPTION

Our client was managing a grant foundation using Microsoft Word and Excel along with their accounting system.

They approached us for assistance in developing a software application that could streamline the process of monitoring compliance, as well as automate manual grants processes. The foundation was soon to be audited and therefore a system needed to be created which could help the foundation work under a stricter process, eliminating any possible error or information gap. There were significant financial penalties if the foundation was found to be non-compliant.



**THE SOLUTION** - "Using Office 365, we built a flexible, secure and easy to use system with offline and mobile/tablet access".

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### WHAT WE DID

We identified that this was a business challenge as well as a software development project. We supplemented our technology team with a financial accountant who undertook a review of the Memorandum to identify the limitations regarding percentages, absolute sums, types of Grants and Programmes etc., against which our client would be audited. Our team also reviewed the draft process documents, which detailed how each limitation should be interpreted and tracked.

We then developed a schematic of data requirements, formats and flows to be the foundation of the specifications for the new custom software.

After the discovery and analysis phase, we recommended that Office 365 was the right technology solution – incredibly flexible yet secure – on which to design, develop and implement an application to automate key elements of their grants management processes and their compliance with the limitations.

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*“After the discovery and analysis phase, we recommended Office 365 as the best fit technology solution”*

Caroline Moncur, Managing Director, 3Connect Bahamas.



From this process, we identified the critical success factors for the software to deliver value to the organization:

- Minimizing of manual intervention in existing processes by implementing automated to workflows and notifications approval processes.
- Deployment of intelligent InfoPath digital forms to seamlessly automate business processes.
- Comprehensive Information Rights Management capabilities including automatic records versioning, audiencing, audit trail, check-in/check-out, retention control and task escalation.
- Granular permissions structure.
- Date and action alerts.
- Comprehensive version control and auditing features.
- Offline & mobile device access.

The new Office 365 solution enabled our client to comply with the limitations as outlined in the foundation’s Memorandum of Articles. It also automated grant management processes saving the client a significant amount of resource time and greatly improving the accuracy of the data.

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## TECHNOLOGIES

### Microsoft Office 365

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## ABOUT 3CONNECT BAHAMAS

3Connect Bahamas is an IT and Business Consulting firm located in Nassau, The Bahamas. It is focused on online application development and management, document and knowledge management services, business process improvement and business intelligence.

3Connect Bahamas serves a diverse group of clients in the tourism, banking & finance and professional services industries.

## CONTACT US

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The logo features the letters '3C' in a white, stylized font inside a dark orange square. To the right of the square, the words 'Business', 'People', and 'Technology' are stacked vertically in a dark blue, sans-serif font.

3C Business  
People  
Technology