INFORMATION LEADERSHIP

**Modern Work
Microsoft365**

Case Study:
New Zealand
Qualifications
Authority

Microsoft
New Zealand
Partner
Awards
– 2021 –

FINALIST

Contents

About NZQA

The New Zealand Qualifications Authority ensures that NZ qualifications are accepted as credible and robust, both nationally and internationally.

NZQA administers the National Certificates of Educational Achievement (NCEAs) for secondary school students and is responsible for the quality assurance of non-university tertiary training providers.

As a Crown entity, with an annual expenditure of around $80 million, they employ about 400 staff throughout the year, with many more contracted for the annual external examination process.

Empowered for Modern Work

NZQA has recently achieved major productivity and efficiency gains by leveraging the power of Microsoft 365.

Working with Microsoft partner, Information Leadership, NZQA has empowered it's staff and customers to be more productive from anywhere, more secure and more collaborative.

"Information Leadership exceeded our expectations - they took a "no barriers to delivery" approach.

Their great people made it easy for us to succeed together."

- Justine Auton,
  Service Delivery Manager
  New Zealand Qualifications Authority

Project Challenges

Aging Systems

- NZQA's legacy IT systems including an EDRMS solution that was end of life
- An orderly transition that safeguarded content and made 'file and find' easier

Information protection and governance

- Robust security for preparation of NZQA exam papers with third-party vendors
- Public Records Act compliance for retention and disposal of records

Getting work done efficiently

- Staff didn't have information at their fingertips to make quick and informed decisions
- Search was poor
- Collaboration on documents wasn't easy
- Working securely with external experts was difficult
- Existing data gathering processes were labour-intensive
- Sourcing information for requests from government ministers was time-consuming

1. **'Eye-Q' and 'School-Q' workspaces -** Monitoring thousands of tertiary and school organisations bringing all information and processes together consistently for access internally as well as external collaboration.

2. **Monitoring student welfare** through self review surveys by education providers.

3. **Exam portal -** Secure collaboration spaces for external exam makers.

Eye-Q

Eye-Q is the name of NZQA's new tertiary workspaces, named for literally keeping an eye on quality.

School-Q

School-Q is the name of NZQA's secondary school workspace.

Innovation: What is different here?

We've hastened the move to cloud based modern work and helped untangle the current IT environment more quickly, safely and cost effectively.

Trying to migrate everything to M365 interfaces in one go was too expensive and would have taken too long. Instead we created new M365 workspaces with APIs to existing interfaces. This secured the content while lowering the burden of change on users. These interfaces will be phased out over time.

Solution Architecture

Azure

Central platform hosting custom services & API's. Safe, secure & scalable.

Provisioned thousands of consistent sites and Teams including autoclassification, powered by Azure based Apps.

Teams for collaboration & Office 365 for modern work including, Word, OneNote, PowerPoint & Excel

Power Automate & Power BI for enhancing productivity & better reporting.

SharePoint replaces legacy document management system. 650,000 documents migrated.

Dynamics 365 & Customer Voice working with complimentary vendor, Magnetism.

NZQA

- Nationwide student welfare surveys
- Assessments Eye-Q | School-Q
- Exam Markers Collaboration Portal

- EDRMS | Case-file Management
- OIA Information Requests
- Ongoing solutions as needed

modern work solutions

implementation partner

INFORMATION LEADERSHIP

Information & Systems Architecture Integration, Migration, Azure design Apps & Workplace Design Change, Adoption & Governance

technologies

Teams | Power Automate | Dynamics 365 | Power BI
SharePoint | Azure | OneNote | Azure B2B | Graph

Microsoft

M365 allowed NZQA to move forward with tight timeframes and budgets as minimal effort was required to integrate with existing line of business systems.

This included an automated process to migrate hundreds of thousands of documents and create thousands of new workspaces, ensuring consistency and avoiding human error. This has allowed NZQA staff to continue working without disruption or the need to understand 'back-end' changes.

> "We love the little things like all the direct links to other systems, maps & data from our CRM and a central OneNote – it's been like moving from a *Morris Minor* to a *Rolls Royce*"

NZQA School Relationship Manager

For the first time, NZQA staff enjoy a single view of the information they need to do their jobs. This includes powerful search with refinement over all TEO/school content.

Eye-Q and School-Q workspaces have a sense of place, content has a home, and staff have the information they need at their fingertips.

Rangitoto College School-Q site
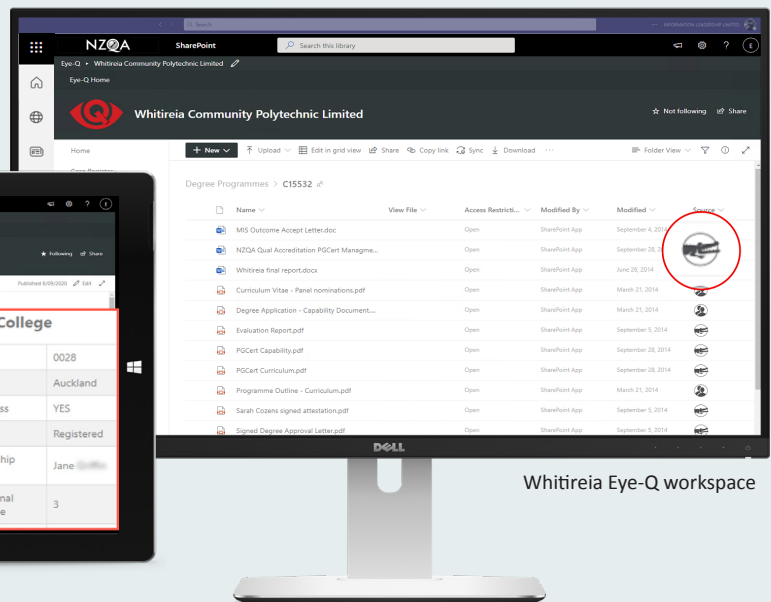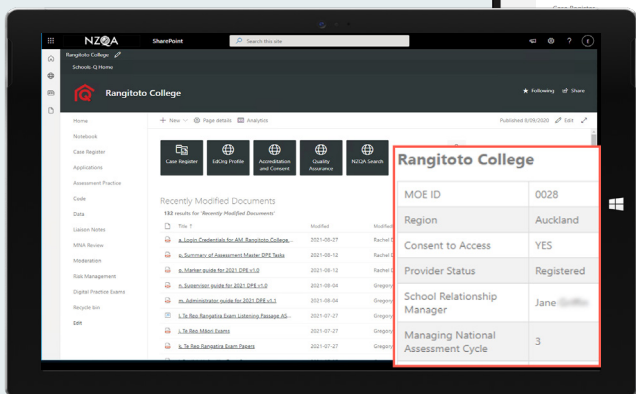
Whitireia Eye-Q workspace

Eye-Q & School-Q in Action

For example, Rangitoto College School-Q site (left image) **provides details** such as location, Ministry of Education number, key contacts and school type, alongside recently modified documents and folders for various activities such as assessment practice and risk management.

Whitireia Eye-Q workspace (right image) provides one place to access all content. Icons let users know the source of documents eg a crocodile icon stands for anything migrated from '**Snap**', NZQA's old case management system.

650,000+
documents migrated

60,000
folders created

By the numbers

- 2,200 Eye-Q and 1,100 School-Q workspaces created
- 20% increase in document volume since go live
- Content accessed by NZQA staff from +3,400 education sites
- Eye-Q & School-Q account for 70% of NZQA's Microsoft 365 tenancy content

One of the key attributes of "Modern Work" is people choose how they want to interact with colleagues and content. On the face of it, Eye-Q and School-Q looks like a large complex document management system. However, the modern work magic is the integration of applications via the API that surface all the information wherever staff choose to work.

"We needed a solution that pulled together information about providers in a single pane view that was intuitive to use - that's what was delivered with Microsoft 365 with minimal fuss.

Where we are today with Microsoft365 is light years ahead of where we were two years ago."

Luke Waring, NZQA Project Manager

Information architecture underpinning the migration

Information Leadership designed the information architecture to accommodate the large volume of content, and security requirements. It ensured content could be tagged with metadata for record-keeping requirements. It was important that the design was scalable and flexible enough to allow for future changes at schools and tertiary organisations.

Adoption & Change Management

We ran change workshops involving a broader group of NZQA stakeholders and the management team.

"The change management workshops were a HUGE success! My expectations were exceeded and we got a deeply engaged management team out of it!"

Justine Auton, NZQA Manager Service Delivery

In 2019, NZQA produced 1.1 million exam booklets. A key priority for NZQA is ensuring that examination papers don't get into the wrong hands before students sit down at exam time. NZQA needed a better system to ensure the integrity of its exam preparation processes. Crucial to this was the transition to SharePoint Online as NZQA's legacy platform was decommissioned.

With automation used to migrate all content from the old platform, subject matter experts can now access the new exam portal securely on any device. The out-of-the-box co-authoring functionality available in Microsoft 365 allows this collaboration in a secure yet flexible way.
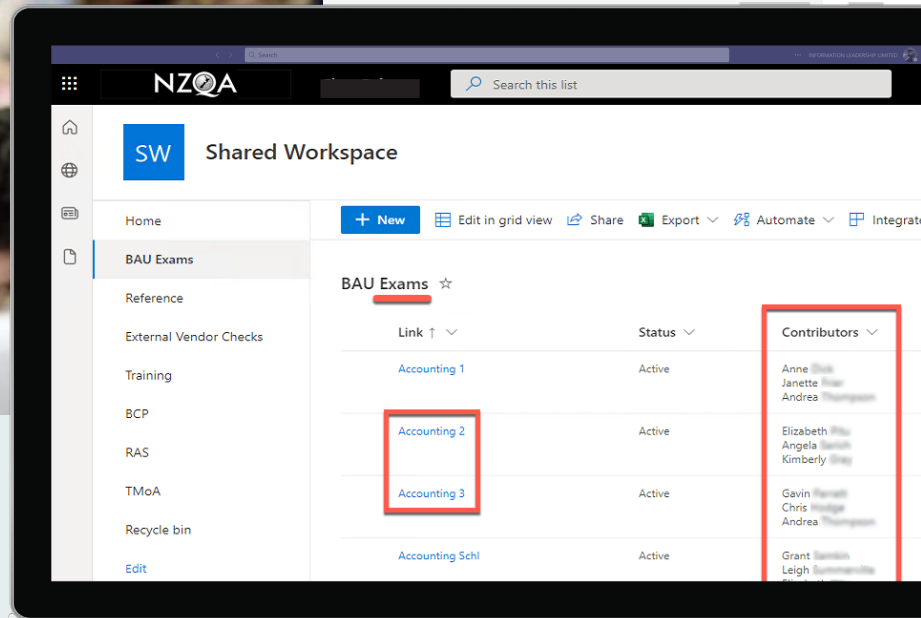
The Exam portal (image on the right) makes it easy to ensure the right people have the right access, eg external 'contributors' for 'Accounting NCEA Level 1' and Accounting NCEA Level 2.'

Key outcomes:

1. **Automation** ensures consistency across many subject areas and NCEA levels, for example:
   - 450, '2023' year folders are automatically created at the click of a button in each of the 155 subject areas from Accounting to Zoology and NCEA levels, 1-3.
   - The process of creating an exam follows a standard process with eight folders for each step automatically created eg, preliminary drafts, to peer critique, to final draft, to proofs for checkers.
2. **Governance** of permissions for external vendors and exam writers has been revolutionised. NZQA staff can invite external users to contribute to exam papers without needing M365 admin rights. This prevents a bottleneck with the IT team.
3. **High engagement** is due to ease of use - The exam portal is NZQA's second most popular externally shared site and is in the top 10 in terms of stored content. There are 27,500 files stored on the site and 4,800 files were viewed in September alone.

#3 Solution for Monitoring Student Welfare

In 2019, served 140,000 students who were entered for NCEA external assessments.

Part of NZQA's responsibility is to ensure secondary school and tertiary education providers uphold their obligations to all students studying in NZ. This project saw Information Leadership and NZQA partner to develop a system that has greatly improved the agency's ability to monitor student welfare across the country.

Previously, a laborious process that involved managing information in Excel spreadsheets. With the move to M365, this has been replaced with an automated system that allows real-time reporting, enabling NZQA to quickly identify non-compliance and facilitate more effective use of data gathered.

Key outcomes:

1. 97% response rate from #1 online self review survey - 400+ tertiary education organisations.

2. Expanded and repeated with #2 survey - 700+ schools responsible for student welfare of international students.

3. Demand for wider application of the new system across NZQA grows.

4. Collaboration practices improved through using Microsoft Teams - allowing staff to collaborate in preparing surveys as well as coordinating follow-up analysis and reporting, and to support hybrid work practices.

Microsoft tools for automation & reporting
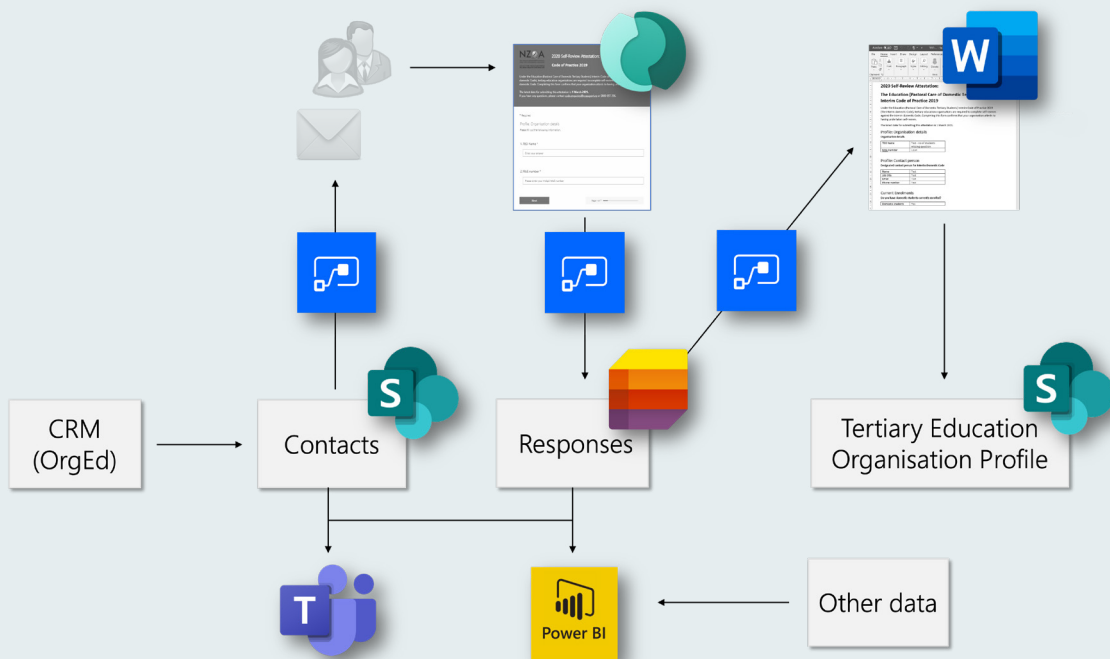
Above: Student welfare survey process showing suite of M365 tools including Power Automate, SharePoint, Teams, Customer Voice, Word and Power BI.

How student welfare monitoring works

Survey sent - The education provider access their self-review survey link via a personalised email that contains information related to their organisation, including name, tertiary institution/school, and Ministry of Education number.

Behind the scenes - SharePoint lists manage the tertiary/school contacts and response data. Power Automate triggers a workflow that sends the personalised email and survey to the school/tertiary contacts using Dynamics 365, and 'Customer Voice' generates the survey.

What the survey asks - Respondents for education providers can only complete the survey once. They are asked to score for ten outcomes that relate to student welfare, including 'physical and mental health of students' and 'a positive and supportive environment in student accommodation'.

Survey respondents are also asked to evaluate actions taken in accordance with the Ministry of Education's Codes of Practice of 'Domestic Tertiary Students' and 'Pastoral Care of International Students' that came into effect on 1 January 2020 and 1 January 2022 respectively.

Completed survey - Once the survey is completed online, respondents instantly receive an elegantly formatted PDF of their responses for their records. If the survey is not completed, dates can be set to automatically send reminder emails and overdue alerts.

Behind the scenes - the workflow dynamically generates a Microsoft Word document, embedding the responses from each tertiary/school contact, automatically saving as a PDF that is sent back to the survey respondent and stored as a record for NZQA reference.

Power BI for real time reporting - Once the survey is completed and a response is detected, the data is presented in a SharePoint list and is immediately available for analysis using Excel and/or Power BI.

Survey record accessible where staff work – Due to the clever integration of all line of business systems, the completed survey is accessible to NZQA staff wherever they work, for example, in an Eye-Q or School Q workspace, SharePoint Online, NZQA's bespoke CRM EdOrg, or via Dynamics 365.

Let's make work better

Information Leadership is dedicated to making work better for NZ organisations.

We deliver Microsoft 365 easy & flexible solutions for users, while providing the confidence & control that information is well managed.

We use the iWorkplace[TM] advantage to harness the power of M365 at scale and get work done quicker and easier.

What we deliver for Microsoft 365 & Teams...

Easy & Flexible
ways of working & collaborating

Confidence & Control
that information is well managed

200+ NZ Digital Workplaces...

Commerical and utilities	Public sector including local government	Integrated change management & governance
Strategy & tactics to get the most from M365	Teams Framework for compliance & collaboration	Public Records Act compliance, Retention & Disposal built in

"We consider Information Leadership a true partner: we partner with organisations where it's a two-way street … We want the people we select as partners to be part of the team."

James Blair, Head of Information Management & Technology

TODD ENERGY

"Thanks to the whole Information Leadership team for your help and support. We wouldn't have achieved anything like the outcome we have with anyone else but you guys. Truly awesome!"

Steve Manners, Chief Information Officer

tasman district council

"The partnership we formed with Information Leadership has been collaborative and responsive - where everyone without exception has been willing to 'roll up the sleeves' when needed to get the job done. Information Leadership has both the experience of the Microsoft solution and the local government sector and its unique needs."

Ewen Church, Chief Information Officer, Te Poumatua Āpiha Puna Kōrero

Kāpiti Coast DISTRICT COUNCIL

"Working with Information Leadership was a great partnership – we were working together on a shared journey, not telling each other what to do. Responsiveness of the IL team is super fantastic... I respected the knowledge IL staff bought into the workspaces."

Naomi Aporo, Group Programme Manager

WAKATU INCORPORATION

"Our Board was extremely impressed with the solution and ease of accessing their Board papers. We got a top class service and solution from Information Leadership which leverages M365 technology perfectly."

Jeremy Clement, Financial Controller

bci

"Information Leadership exceeded our expectations. They took a "no barriers to delivery" approach, helping us with internal technical issues and working extremely well with a complimentary vendor. Their great people made it easy for us to succeed together."

Justine Auton, Service Delivery Manager

NZQA NEW ZEALAND QUALIFICATIONS AUTHORITY MANA TOHU MĀTAURANGA O AOTEAROA

Microsoft Partner

Gold Cloud Productivity
Gold Collaboration and Content
Gold Application Development
Silver Project and Portfolio Management
Silver Enterprise Mobility Management

Microsoft

NZ's 1st Content Services Partner

Information Leadership is the only NZ owned Microsoft Partner and have been members of the elite Content Services Partner Program for three years.

Microsoft selects partners in the Content Service program for their proven ability to help customers succeed and achieve more with their content in Microsoft 365.

We're recognised for our proven expertise in implementation and compliance/record management.

Microsoft
Content Services
Partner Program

"It's exciting to see Information Leadership become members of our global Content Services Partner Program. We're seeing Microsoft customers increasingly move to modern approaches to enterprise content management. It's great to know that we have a world-leading content services partner able to assist them."

- Russell Craig, National Technology Officer, Microsoft NZ

Empowering Employees Partner of the Year
2020 - Tasman District Council | 2019 - Todd Energy

For a second year in a row, Information Leadership was named Microsoft NZ's Empowering Employees Partner of the Year. Tasman District Council's CIO and IS Manager, Steve Manners and Peter Darlington, joined the IL team at the awards ceremony to celebrate the shared success.

"The award recognises a partner that enabled their customers to work more collaboratively. The customer's specific needs of information management, governance, mobility and collaboration were focused on and it was impressive the way Microsoft 365, Teams and the Power Platform were used to innovate." - Microsoft NZ

900 public sector staff

Colossal effort has been made to share our knowledge on how M365 supports Public Records Act [PRA] compliance in Aotearoa.

This has included 900 public sector staff attending our workshops and webinars, some co-hosted with Microsoft NZ, and a whitepaper published by Microsoft.

White Paper: M365 Supporting PRA Compliance

In January 2021, Microsoft published a whitepaper, co-created with us, that documents an assessment by Information Leadership of the capability of M365 to support organisations in meeting their obligations under the New Zealand Public Records Act 2005. https://aka.ms/NZPRA

Supporting New Zealand's Public Records Act compliance obligations with Microsoft 365

Published by Microsoft New Zealand (January 2021)

Microsoft   INFORMATION LEADERSHIP

M365 & Teams NZ Roadshow

The appetite for in person workshops following the publication of Microsoft's whitepaper was huge. Information Leadership ran nine workshops with a particular focus on PRA compliance and the advanced features available in E5.

185 people from 95 public sector organisations attended nine workshops across NZ late 2020/early 2021. Each workshop ran for 3.5 hours and deep dived into aspects of practical aspects of retention and disposal in M365.

Stellar feedback was received from attendees and we received an NPS score of 8.7/10. Workshops were run in Auckland, Christchurch, Hamilton, Tauranga and multiple sessions in Wellington.

Co-hosted webinars

Two webinars on M365 supporting PRA compliance with 550 registered attendees were delivered in March and July 2021. Both webinars are available to users on demand on Microsoft.com. In these webinars, we advise how to get started with **Teams governance & compliance** and how **M365 supports PRA Compliance**.

Our Solutions for Customers

Digital workplace roadmap

Where customers need to make a business case to get off legacy systems. This includes:

- Migration of content from legacy EDRMS such as HP TRIM, Open Text, Objective
- Microsoft Teams front and centre with compliance and automation built in

New starts

Where customers have no current Enterprise Content Management System and want to embrace new modern ways of working, including Microsoft Teams.

Makeovers and restarts

Customers who have gotten off to an unstructured or poorly structured start with Microsoft 365 and now have a mess and poor findability/usability.

Migration from legacy systems

Where customers have significant legacy/SharePoint on-premise ECM and wish to move and embrace Microsoft Teams and the full Microsoft 365 modern workplace. Our IP includes a 25 page whitepaper on strategy, tactics and a migration roadmap.

Read the whitepaper:
informationleadership.co.nz/go/whitepaper01

Contact us today

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let's make work better