



SpinLondon presentation
July 2011
Rishi Sapra

HOW MICROSOFT DESKTOP TECHNOLOGY SOLUTIONS CAN HELP DRIVE THE LEAN/PROCESS IMPROVEMENT AGENDA IN BUSINESS

BACKGROUND

- Me: ACA (Deloitte), HSBC (Product Control), Barclays
- Current role in Barclays Finance Change team:
 - Purely focused on MS Desktop technology solutions for Finance
 - Tactical Change – Quick, Robust solutions
 - Close to the Front Line
 - Help Drive Process Improvement Agenda



FINANCE
AUTOMATION
SOLUTIONS TEAM
*Making things better,
faster.....*

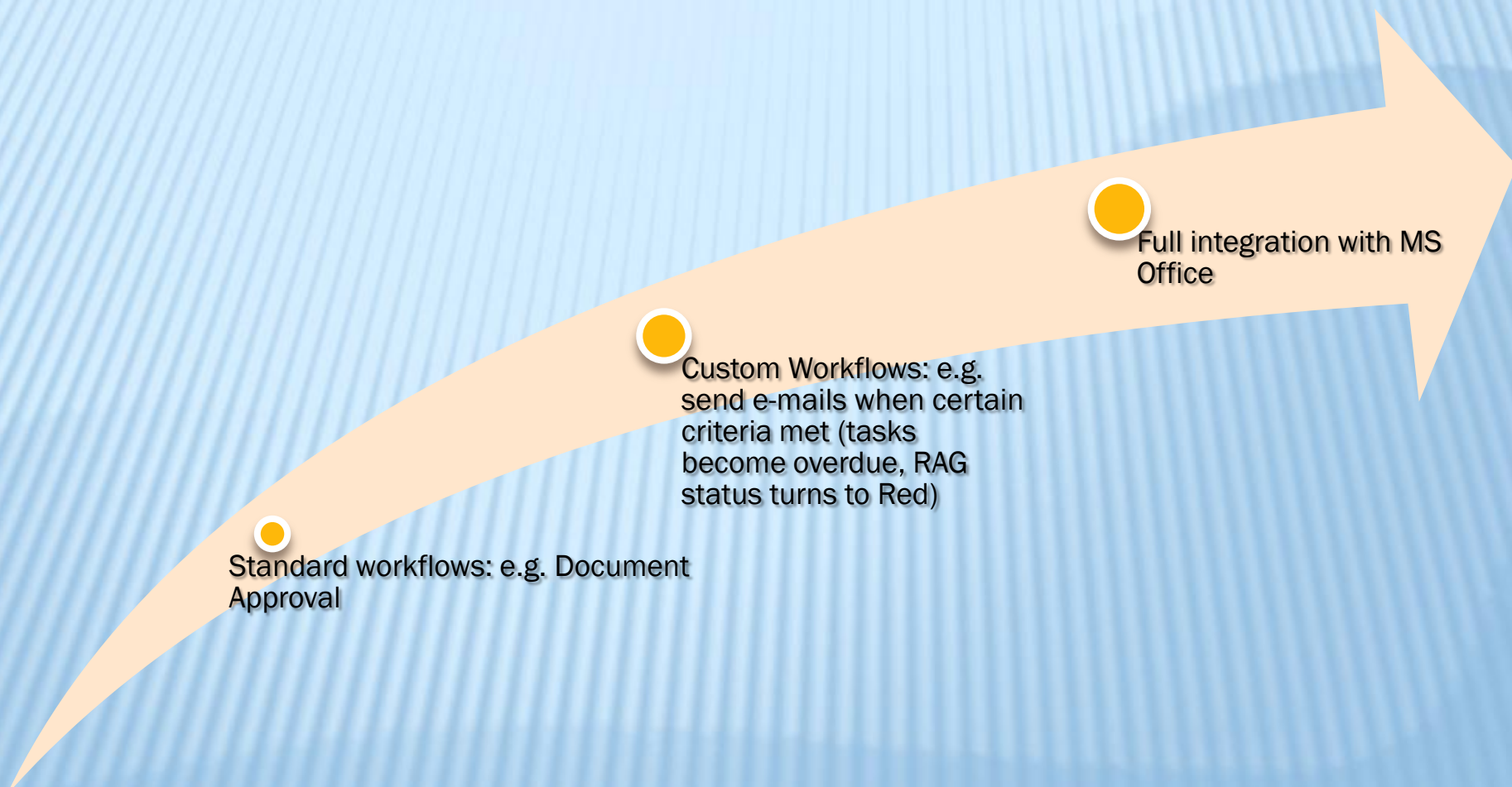
AGENDA

- Excel - What have spreadsheets become?
- Sharepoint 2010: The solution for Workflow
- The power of desktop tools in Finance
- Benefits and Risks of Spreadsheet Solutions
- What this all means for business

EXCEL – WHAT HAVE SPREADSHEETS BECOME?



SHAREPOINT: THE SOLUTION FOR WORKFLOW



Standard workflows: e.g. Document Approval

Custom Workflows: e.g. send e-mails when certain criteria met (tasks become overdue, RAG status turns to Red)

Full integration with MS Office

File Workflow

Save Publish Check for Errors

Advanced Properties Delete

Move Up Move Down

Condition Action Step

Else-If Branch Parallel Block Impersonation Step

Publish Globally Export to Visio Workflow Settings

Initiation Form Parameters Local Variables Association Columns Variables

Navigation

Site Objects

- Obchodní oddělení
- Lists and Libraries
- Workflows
- Site Pages
- Site Assets
- Content Types
- Site Columns
- External Content Types
- Data Sources
- Master Pages
- Site Groups
- Subsites
- All Files

Workflows

- Globally Reusable Workflow
- Approval - SharePoint 2010
- Collect Feedback - SharePoint 2010
- Collect Signatures - SharePoint 2...
- List Workflow
- Schválení slevové úrovně

Schválení slevové úrovně

Obchodní oddělení

Step 1

If Current Item: Slevová úroveň > 0

- Start Task (2) pro slevu

Else

- Set content approval status to Pending

All Actions

- Set Time Portion of Date/Time Field
- Set Workflow Status
- Set Workflow Variable
- Stop Workflow

Document Set Actions

- Capture a version of the Document Set
- Send Document Set to Repository
- Set Content Approval Status for the Document Set
- Start Document Set Approval Process

List Actions

- Copy List Item
- Create List Item
- Declare Record
- Delete Drafts
- Delete Item
- Delete Previous Versions
- Discard Check Out Item
- Check In Item
- Check Out Item
- Set Content Approval Status
- Set Field in Current Item
- Undeclare Record
- Update List Item

BENEFITS AND RISKS OF SPREADSHEET SOLUTIONS



Benefits

- Familiar interface and easy to use
- Flexibility and Speed in build
- Integration with other Applications
- Program custom functionality in VBA



Risks

- Over dependence/reliance
- Maintainability
- Lack of Audit Trail/Controls
- Performance

But these Risks can all be mitigated through proper design and build

WHAT DOES THIS MEAN FOR BUSINESS?

- Manage Risks by having solutions built by people with the skills and time to do it right.
- A team which is close to the front line focusing on building solutions using these tools brings:
 - Quick, powerful solutions built in hours or days, not months or years
 - Huge time savings – Quick-wins on the LEAN/Process Improvement agenda
 - Increased quality of reporting and presenting data, better decision-making
 - Improved skills across the business

QUESTION FOR CONSIDERATION:

ARE TACTICAL TECHNOLOGY SOLUTIONS (USING DESKTOP TOOLS) OFTEN A MORE COST EFFECTIVE , TIMELY AND FLEXIBLE SOLUTION TO BUSINESS PROBLEMS COMPARED TO ENTERPRISE APPLICATIONS?