



Collaboration Re-loaded: Catapult Systems Eases User Adoption Challenges of Transportation Provider

Implementation of Office 365 SharePoint Increases Productivity and Improves Communication Among Internal and External Capital Metropolitan Transportation Authority Users

The Capital Metropolitan Transportation Authority, commonly referred to as Capital Metro, is a public transportation provider located in Austin, Texas. It operates bus, paratransit services and a commuter rail system known as Capital MetroRail for Austin and several suburbs in Travis and Williamson counties.

Capital Metro faced many user adoption challenges with their internal project and document collaboration processes. With a large portfolio of projects throughout the organization, it was important for Capital Metro to be able to track and manage information collaboratively. Their legacy records management software no longer met the organization's needs. Capital Metro wanted to ensure that Catapult Systems delivered guidance on industry standard best practices, keeping in line with their strategic plan. It was also important that Capital Metro improve their process for sharing information with external partners and help ease user adoption concerns by implementing an Office 365 roll-out and training plan.

The Solution: O365 SharePoint Pilot

Capital Metro stores millions of records throughout the organization. Catapult Systems provided guidance to Capital Metro on configuring SharePoint 2013 in the cloud to distribute department information within a subset organization. This provided a pilot program

that assessed and demonstrated the capabilities of SharePoint 2013 Online. The pilot program targeted two major collaborative departments, Legal and IT. After a successful pilot, Capital Metro leveraged Catapult Systems' guidance and user adoption materials to onboard additional departments to the SharePoint 2013 Online platform. Catapult Systems provided an iterative process to Capital Metro so the methodology could be reused for other department rollouts. The iterative process resulted in customized collaboration sites that enabled the organization to share information among their team and across the organization.

The Solution: O365 Client Extranet

The successful SharePoint 2013 pilot program led to the identification of additional opportunities that would improve Capital Metro's legal team's ability to share documentation efficiently with external users, including outside legal counsel and other partners, as part of their daily and weekly activities. Catapult Systems provided secured collaboration sites that enabled their legal team to

track information and manage access with their external partners. This external access can be attained through a Microsoft account.

The Solution: O365 Records Management Pilot

Catapult Systems developed a Records Management Pilot that demonstrated how to leverage SharePoint 2013 Online to improve Capital Metro's current records management capabilities, as well as the ability to find records based on keywords. Capital Metro's existing records retention software stored millions of records, but lacked the capability to efficiently maintain and search these records. Extensive analysis was performed to determine content organizer rules, disposition workflows, security requirements, and retention policies for SharePoint 2013 Online. With Catapult Systems' guidance, Capital Metro successfully launched a number of enhanced features on this new platform such as document linking, metadata, version control, retention policies, departmental folders, department-level security, information discovery, purge schedules, litigation holds, destruction logs, and advanced content search. Additionally, existing records from the organization's previous system, Hummingbird, were migrated to the new SharePoint 2013 Online platform.

Results

After successful implementation and guidance of SharePoint Online, Capital Metro has a repeatable model that can be used for onboarding additional departments in the future. Policies are now in place to help the organization's collaborative platform grow in a sustainable and maintainable way.

Other Gains Include:

- Capital Metro has significantly reduced the number and size of communications by sharing collaboratively with the SharePoint 2013 Online Platform.
- User adoption and training materials have been created and leveraged to contribute to a high user adoption rate for the new collaboration platform.
- Records retention policies are clearly defined and responsibilities have been delegated to the appropriate subject matter experts within the organization.
- Capital Metro employees can access their documents and information from any internet-enabled device using Microsoft's secure authentication protocols.

“ SharePoint is a software framework that has the potential of increasing productivity by improving communication, connecting people and information, and fostering teamwork. ”

*Joe Iannello
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