Using MS SharePoint as a Tool for Audit Team Efficiency

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Does this sound familiar?

- MANY years of decisions, directions, information
  - Not easily accessed
  - Everyone has their own (often outdated) version
  - Employees took knowledge with them
  - SOX source of record is better as a repository than a workspace
- Lack of a central place for collaboration on annual audit / SOX work, where documents were available to all and not hostage on someone’s hard drive
- Lack of a central repository for self-service reports
- Lack of a project space for collaboration on projects
- Training / documentation scattered, no one place for it to be maintained and easily accessed
We had a KNOWLEDGE and EFFICIENCY problem!

Our Existing Knowledge Landscape

- Docushare
- CSDB
- Xerox Webboard (Intranet)
- Personal Drives
- NAF IC Site
- ICO_GROUP Shared Drive
- Central Files
- Compliance Tool - SOX testing & activity tracking
- FIC Field Information Center
- Mailnotes
- Xerox Policies Site
- Outlook Folders

We had a KNOWLEDGE and EFFICIENCY problem!
We needed a solution that was:

- Able to bring the knowledge together in one place
- Low cost and user friendly
- Flexible
- Collaborative
- Able to re-purpose information from other sites
- Minimal effort to update and add other features/functions
- Minimal work to design to make it appealing and user friendly
- Able to provide usage information by user /page to track what the team was using the most/least
- Secure, with minimal intervention and set up by the owners of the site
- Seamlessly interoperable with other Microsoft products (Access, Excel, Outlook, etc.)
Microsoft SHAREPOINT was the clear winner

- It was the only solution that did everything we needed, all in one place
- Relatively easy to implement, immediately
- The only cost was our time
- SharePoint Designer allowed us to customize to present information the way the team wanted to see it
Keys to Our Success

• $$ was not a barrier – there was no out of pocket cost, we already had an enterprise license
• Planning, planning, planning – on paper first, to do it right the first time!
• User pilot, with any issues addressed upfront
• The site has very useful and timely information, kept up to date
• Users have a reason to go to the site often – reports, project collaboration, training, communications
• Automated alerts let team members know when there are updates to the site for areas important to them
Benefits Realized

- Decreased e-mail traffic – everyone knows where to go get documents
- Better collaboration (update lists real-time, work on documentation, view reports, etc.)
- More consistency in work product – templates, desk procedures, etc. readily available
- Easier to manage annual changes to procedures and policies
- Much easier to manage action items across the entire team
- Report availability to external auditors and all levels of internal personnel
- Accelerated, self-directed training for new employees
Demonstration – Xerox Internal Controls Knowledge Management Site
Learn More

Check out the Microsoft SharePoint web site for the latest information

The new way to work together

SharePoint Online
With Office 365, SharePoint offers enhanced security technologies, is easy to manage, and can be accessed from almost anywhere.

Yammer
Extend the collaborative power of SharePoint by using it with Yammer—the enterprise social network.

Apps for SharePoint
Apps are a great way to add more functionality to SharePoint. Browse and search for apps on the SharePoint store.

Many on-line resources – video tutorials, how to get started guides, etc.
Questions?
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Thank you for your time!