

M365 Early Adopters Pre-Test Survey

Your answers to this survey will provide baseline data based on your current digital working experience. It should take you around 30 minutes to complete.

About you

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Department

- Environment
- C&CS
- HSCP
- Education
- Trust
- CEO

Your work setting (tick all that apply)

Select all locations where you spent a significant amount of time working, before the Covid-19 pandemic.

- In the office, customer facing
- In the office, back end
- Working from home
- In the field, not customer facing
- Home visits
- At a venue (school, library, sports facility)

Digital Engagement

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Thinking about how well you adapt to digital changes, rate how much you agree with the following statements

| | Strongly Agree | Agree | Disagree | N/A |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Adjusting to a new work laptop/PC would be easy for me | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I embrace new systems that the council or my department roll out | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I am comfortable with the digital expectations of me in my role | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

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Which statement best describes you

- I actively seek out new digital opportunities to improve how I or my colleagues work and try to get others to follow
- I embrace new tech and digital ways of working when they are shown to me by others
- I wait for new digital ways of working to be established before trying them myself
- I prefer not to change the way I work unless I have to
- I resist change

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Which of these apps or features of Office 365 do you use and how often?

| | Daily | A few times a week | Weekly | Less often | Monthly | Never |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| OneNote | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Teams for Meetings | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Teams for calls or video calls | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Teams for chats | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Teams and Channels (posting or file sharing) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Sway | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Yammer | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Stream | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Planner | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Forms | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Skype | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| SharePoint | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Whiteboard | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

How confident are you in using these Office 365 apps features?

For each one, rate your skill level from Advanced to No Knowledge

| | Advanced | Intermediate | Beginner | No Knowledge |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| OneNote | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Teams for Meetings | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Teams for calls or video calls | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Teams for chats | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Teams and Channels (posting or file sharing) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Sway | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Yammer | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Stream | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Planner | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Forms | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Skype | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| SharePoint | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Whiteboard | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

How helpful have you found the following Office 365 support resources?

| | Very helpful | Somewhat helpful | Somewhat unhelpful | Unaware they existed | Know they exist but not used |
|---|-----------------------|-----------------------|-----------------------|-----------------------|------------------------------|
| Intranet Support pages (http://intranet.erc.insider/article/9717/Office-365-Support (http://intranet.erc.insider/article/9717/Office-365-Support)) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Digital Champions led workshops (Planner or Teams) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Full day Office 365 training by Elite | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Support from a Digital Champion (not workshops) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Support from ICT Helpdesk | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Self-help/online research | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

What would help you get more from Office 365?

List any opportunities or barriers

Microsoft Teams



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When working with files in Teams, how confident would you be doing the following in order to reduce duplication and maintain the integrity of council records?

Very confident Fairly confident Not very confident Not at all confident

Delete original network copy of documents uploaded from the network to Team Files which only members of your MS Team need to access and work

Clearly mark as copies, any documents uploaded from the network to Team Files for ease of reference to support team work

Save finalised documents that need to be retained and managed as council records back to the network - or other appropriate Council system

What general observations, issues or concerns do you have about the ease of creation, access, use and control of documents and records relating to the current and completed work, where these are stored in both the network drive and Teams files?



When communicating, collaborating and information sharing with other Teams members, which of these features do you use to do so and how often?

| | Daily | A few times a week | Weekly | Monthly | Less often | Never |
|---|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| Using @notifications in Team channel posts | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Use @notifications in office documents stored in Team Files | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Adding a link to a Teams file in a Chat | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Attaching a file in a Chat | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Adding a link to a Teams file in a channel post | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Collaborate on the same document directly within Team Files during a Team meeting or call | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Use of Planner and tasks lists within Teams | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Thinking about your experience of Teams, rate how much you agree with the following statements

| | Strongly Agree | Agree | Disagree | Strongly disagree |
|---|-----------------------|-----------------------|-----------------------|-----------------------|
| I use Teams rather than email to communicate and share information with other Teams members | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I find it difficult to know when to use email, Channel posts or chat when communicating with colleagues | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Using Teams has saved me time and is a more efficient way of working | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |



Records Management

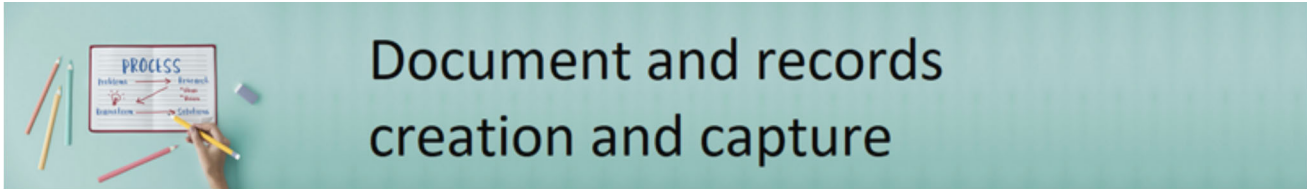
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How far do you agree or disagree with the following statements?

| | Strongly agree | Agree | Disagree | Strongly disagree |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Records management is everyone's responsibility | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Records management requirements are a barrier to working efficiently | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Records management is an essential part of my work | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I know what records I need to create and capture to account for my work in the Council | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I name and file these records appropriately to ensure they remain accessible for as long as they are needed to support current work and for their longer-term information and evidential value | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

How confident are you that you understand our policies and procedures and your responsibilities in the following areas of information governance and compliance

| | Very confident | Fairly confident | Not very confident | Not at all confident |
|---|-----------------------|-----------------------|-----------------------|-----------------------|
| Data protection policy | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Data protection breach procedure | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Information security policy | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Information security classification scheme/protective marking | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Records management policy | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Business classification scheme and records retention schedule | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Subject access and freedom of information requests | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |



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When creating new documents, how often do you do the following?

| | Always | Frequently | Occasionally | Never |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Create from scratch using a blank document | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Copy a similar document you have created in the past | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Use an internal corporate master template | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Use a template provided by an external organisation | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Which of the following do you try and include in the name/title of documents you have created?

| | Always | Frequently | Occasionally | Never |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Organisation and/or individual name (eg for documents relating meetings, correspondence) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Relevant date | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Subject | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Version No. | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Document Type (eg report, minutes of meeting etc..) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

Thinking about your experience working with files on the Council network, indicate how far you agree or disagree with each of the following statements

| | Strongly agree | Agree | Disagree | Strongly disagree |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| I have difficulty knowing where to save a file I have created myself or received from an external party | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| If I can't find a folder to save a file, I will create a new one | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| I am familiar with my team's network folder structure and what documents should be saved where | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Someone new to my team would find it easy to use our network folder structure to file and find documents | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |



Internal working and information sharing

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How confident are you that you will be able to easily find existing files - created by you or others - in Council network shared drives?

| | Very confident | Fairly confident | Not very confident | Not at all confident |
|---------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| In one years time | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| In three years time | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| In five years time | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

How frequently do you create and/or access information in the following systems/locations to support your work

| | Daily | Weekly | Monthly | N/A |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Shared network drive (e.g. I: or Z: drive) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| 'Personal' filing on the network (H: drive or personal folders on the I: drive) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| MS Teams files area | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| One Drive | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Outlook - personal mailbox: inbox and sent items | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Outlook - folders you have set up within your personal mailbox | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Outlook - group mailbox | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Paper-based filing systems (when working in the office environment) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Corporate or service- specific business systems | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

When you are working on a document with internal colleagues, how often do you do the following?

| | Frequently | Occasionally | Never |
|---|-----------------------|-----------------------|-----------------------|
| Email the latest version as an attachment | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Email a link to the document | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Tell them which folder it is in / where to find it | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Share a paper copy (when working in the office environment) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Work with multiple versions for different people's comments | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Work on the same version of a file using tracked changes | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Work on the same file at the same time as others within MS Teams | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Save a copy of the file to your One Drive | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Save a copy of the file to your desktop | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Save a copy of the file to your "H" drive or personal folder on "I" drive | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

When searching for documents in the network drives, how often do you experience the following

| | All the time | Regularly | Occasionally | Never |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Find it difficult to find a document or folder you have created yourself | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Find it difficult finding a document or folder created by other people in your own team | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Find it difficult finding a document or folder created by other people in your Service/Department | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Find it difficult finding a document or folder when working with other Council services | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Find it more efficient to ask someone where they have put a document than to try and find it yourself | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Find it hard to tell if you have found the most current document or information | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Once you have found a document that you need but did not create yourself, save your own copy so its easier to find next time | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

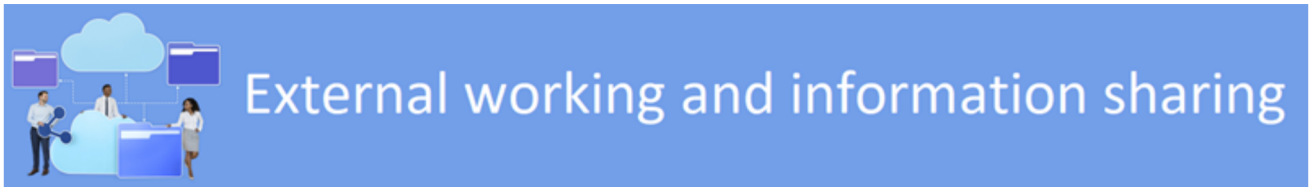
When working with files stored on the Council's network, how often have you encountered or done any of the following?

| | Frequently | Occasionally | Never |
|--|-----------------------|-----------------------|-----------------------|
| Lost a file on the server | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Been unable to open a file because it is corrupted | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Not found a file when you looked in the "logical" place on the network | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Spent more than 2 minutes looking for a file on the network | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

How often do you do the following?

| | Always | Frequently | Occasionally | Never |
|---|-----------------------|-----------------------|-----------------------|-----------------------|
| Ensure sent files are protected from amendments or deletion | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Save finalised documents in PDF format | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Save finalised documents as read-only | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Save finalised documents in a read-only folder | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Separate working documents from finalised versions | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Ensure you delete documents that have no value beyond their immediate purpose e.g. convenience copies, working documents and minor drafts | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Delete documents and records in line with the Council's records retention schedule | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

External collaboration and information sharing



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How often do you share ERC information and/or collaborate with individuals from external organisations?

| | Daily | Weekly | Monthly | Never |
|--|-----------------------|-----------------------|-----------------------|-----------------------|
| Contractors and other third party suppliers | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Partner organisations (other councils, Scottish government etc.) | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Regulators | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

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How often do you use the following to do so?

| | Frequently | Occasionally | Never |
|--|-----------------------|-----------------------|-----------------------|
| Email attachments | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Include the individuals as external guests in MS Teams | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| Provide access to the document in your One Drive | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |
| File transfer sites e.g. Dropbox | <input type="radio"/> | <input type="radio"/> | <input type="radio"/> |

