



White Paper SharePoint Overview

June 2009



What Is SharePoint?

Summary

Microsoft SharePoint2007 is a system that lets you store and actively manage all company information, and presents the information in an easy-to-use way to staff, customers and partners via a browser. It can do pretty much anything a company wants to do with information! It is low cost and relatively easy to install and configure.

It has been around for a few years, but when it added document management functionality in 2007 it became immensely powerful and the usage of it has spread faster than any other IT system.

In addition to managing all sorts on information, it can very easily integrate with other systems (such as CRM) to be able to also present information stored to users. Information can be automatically filtered and presented differently to different types of users. Hence, it can be classed as a portal, an intranet, a web site, a search engine, a document or content management system, a form processing system, and a database. Customers can use one or many of its features, but the real power comes from using it to manage and access ALL company information.

Anyone who has used the BBC website will be aware of the power of being to access a wide range of information from one place, whilst behind the scenes different parts of the BBC manage the information in different ways. SharePoint uses the same philosophy within organisations. It really adds great value to collaborative team and project working.

It is very low cost product that is very stable and easy to install. The big challenge is how best to harness its power and implement it in a professional way.



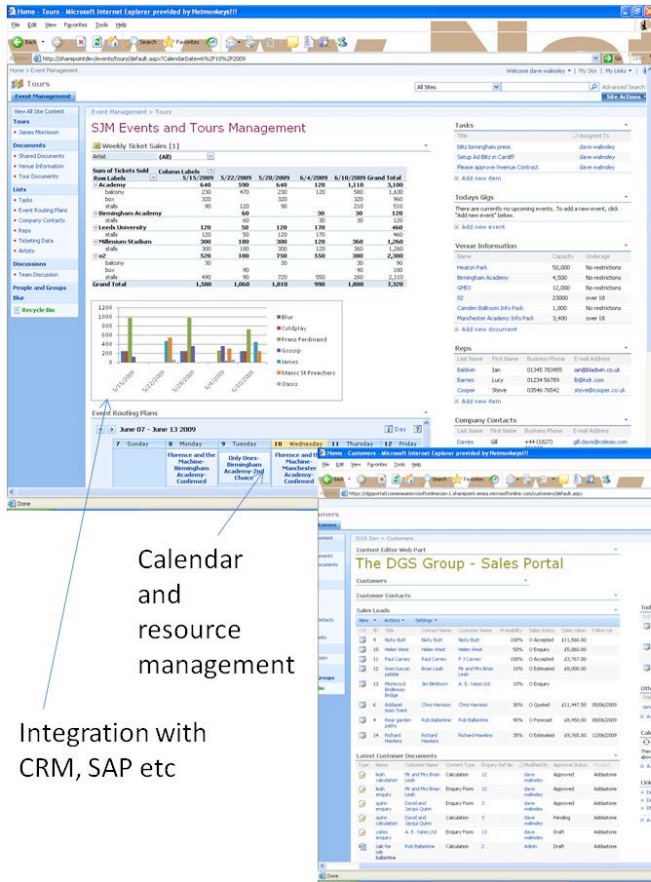
Introduction

Microsoft’s own definition is “Microsoft Office SharePoint Server 2007 is an integrated suite of server capabilities that can help improve organizational effectiveness by providing comprehensive content management and enterprise search, accelerating shared business processes, and facilitating information-sharing across boundaries for better business insight”.

SharePoint has a whole host of features:

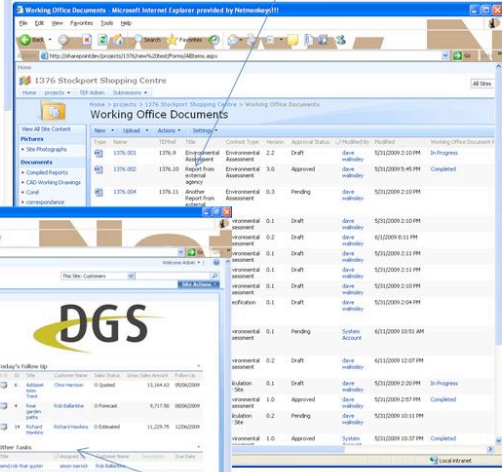
- Document and Forms Management
- Collaboration
- Task and Plan Management
- Internet Site Management
- Reporting Dashboard
- Data Management

It can also link to other sources of information very easily.



Tasks (workflow)
Contact Management

Document Management
(inc workflow, version control)



Calendar and resource management

Integration with CRM, SAP etc



Database functionality

All information contained within it, or linked from other sources, can be displayed in a very easy-to-use way.

However, it is modular and companies can choose which parts of SharePoint they want to use. It can start small and have features incrementally added.

Because it is Microsoft it is aimed at all sizes of company and can be deployed and configured relatively easily.

SharePoint as an Information Portal

If you want some non-work related information where do you go? Google is an obvious choice, if you don't mind wading through thousands of irrelevant web sites. However, for a lot of people, the BBC website is a good starting place. TV schedules, news, travel, weather, TV programmes on demand.

If you want to, you can personalize the site so that only the content you are interested in is displayed.

So, whatever you are doing (deciding what to do on a quiet Sunday, finding out football results, working out how to travel to a party) you can do it very quickly.

The BBC website (which doesn't actually use SharePoint) is a great example of how a company has realized that its main product is information. Not only does it have to make a whole mass of content available to consumers, but that content has to be internally managed in a very efficient

way so that it automatically appears on the site. So, different teams will be responsible for the weather (the Met Office), News, BBC iPlayer.



Microsoft SharePoint is based on the same principle, bringing the power of the internet to organizations. This is incredibly important because nearly all organizations these days consume and produce information and little else. An architect's practice will use specifications, instructions, reference material, and produce drawings and specifications. Along the way, transitional information such as tasks, plans, correspondence and meetings will also be used.

The problem is that companies find this very difficult because information is trapped in existing silo systems; correspondence (and often documents too) is in personal email, sales information in CRM or even on Excel spreadsheets, documents in network drives configured and accessed very haphazardly, paper copies, and tasks on pieces of paper or inside project plans. This makes things VERY difficult for an employee to find the information they need whenever they have to undertake a task.

What Does SharePoint Do?

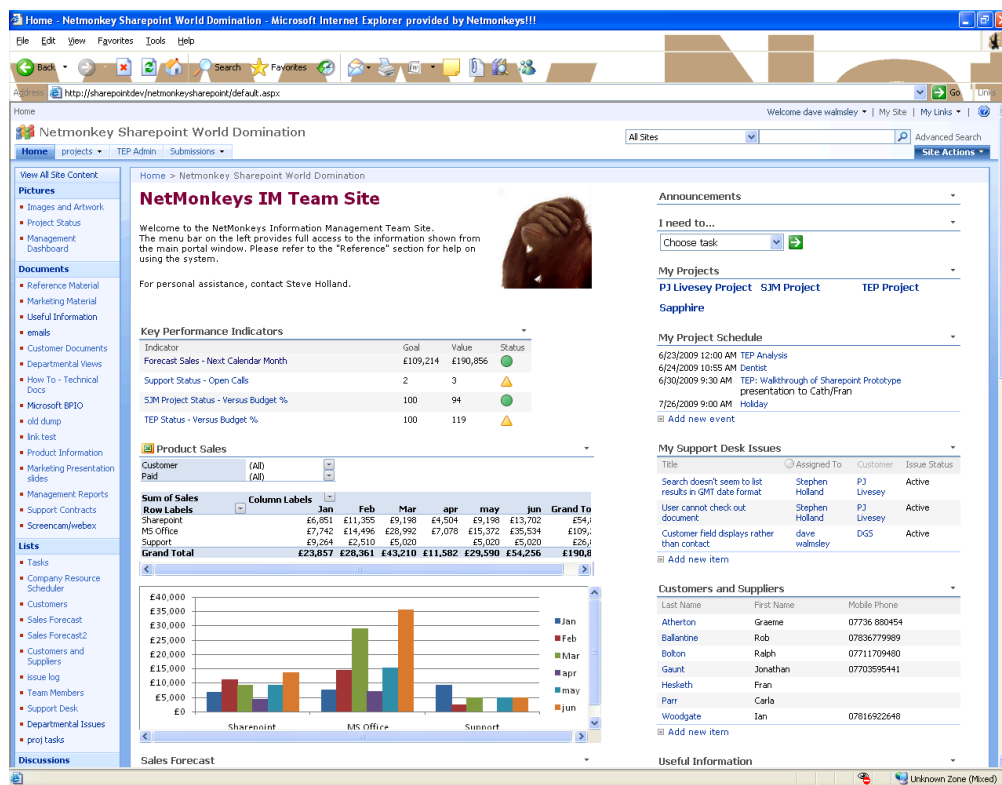
SharePoint is a huge beast of a product that is incredibly full of features. It can be a document management system, be used to manage your website, be used to collaborate on projects with external partners, to publish live finance data for senior management etc. But don't let that worry you, or even think "it's too big for us". One of our customers has just seven employees and uses it to manage a diverse range of information.

It is big, but made up of a lot of small components. It is based on a web interface. So, just like the BBC making a lot of different information available in one place, SharePoint presents a wide range of company information.

The information may be managed by SharePoint. For example, there is document management functionality (with version control), issue management, contact list management, powerful search, and a really easy way to manage all sorts of “lists” to make quite feature rich applications e.g., management of sales leads and associated quotes, enquiries and other sales information. Crucially, existing systems can plug into it. So, if you have an existing MS Access system for recording project information, or spreadsheets for showing financial reports, this can easily be linked in and displayed through the SharePoint interface.

This means a ‘dashboard’ can then be made. So, an employee working in NetMonkeys Information Management practice can see the sales for the last few months, find and view product information, see the main customer and supplier contacts, deal with any tasks assigned from project managers, or edit a customer document they were writing,

They could also enter timesheet information, submit an expense claim and see what customer assignments they have for the coming week.



This means that different departments can work on their information (e.g., the technical department can produce documents for customers, the sales team work on sales leads, the finance department can still update the accounting system) but all this information managed in different parts of the company is displayed and made available to others from a central place. Whenever a new document is edited and approved, the new version is automatically displayed.

Because it is displayed through a series of 'web parts', it means that the different components of the dashboard can be made available to other types of staff. So, customer documents can be made available to the support department.

SharePoint is constructed to let teams work and collaborate on projects (or events, or on a customer file), but the information is not trapped within the local team area. Output can be published to central library, routed to non-team members, or data 'rolled up' to produce management reports across a range of projects.

It links in with email so that any tasks assigned to people (e.g., to approve a document) are sent in an email automatically.

Example Ways SharePoint Can Be Used:

1. Managing HR records (including retention policies)
2. Routing and approval of scanned invoices
3. Managing major design project documents
4. Complete management of a company website
5. Managing artwork and presentation material
6. Using it as a shared email repository
7. Scheduling of staff
8. As an entry point for database applications (time sheet management, sales leads etc)
9. As a central point for management reports
10. As a search engine for all company information

SharePoint Is Easy to Install and Configure

Like all Microsoft products, SharePoint is targeted at the masses. In theory, whole systems can be put together without any code being written. So, if you manage company policy and procedure documents, you can set up a document library, apply a template that will automatically be used by anyone creating a new document, add metadata (e.g., discipline field, doc reference number etc) that will be mandatory whenever anyone adds a new procedure, and a workflow which routes documents for approval automatically.

HOWEVER! This is where the big danger comes in. It's a little bit like a timber-framed house which, in theory, can be assembled quite easily. Without an architect, or a qualified civil engineer to make sure foundations are properly in place, and the house is assembled properly, disaster awaits. SharePoint still needs Information Management experts to know how best to relate information together and create the information foundations. It needs people that specialize in business change and business processes and people who know how to run a project. Quite simply, without this, SharePoint will either fall short of its potential or not be used at all.

Start Small But Think Big

SharePoint can be used within one or two pilot areas to begin with. Maybe it is used to manage sales leads and customer contacts. However, it is vital to think and plan for wider usage. The goal should be to make all company information available 'through' SharePoint. While some of it will be managed by SharePoint other information will still be managed through existing applications but plugged into SharePoint.

Without using SharePoint for everything, it just becomes another silo application.