

SHAREPOINT PORTAL CASE STUDY

Architecture Team Portal

Our Client is a large financial institution. Its Central Architecture Team is a small, distributed architecture consulting group that interacts with and acts as glue between the company's various IT and business group to ensure the successful delivery of complex technology projects. The Architecture Team Portal has served as the primary vehicle for information dissemination and creative collaboration amongst the Central Architecture Team members and with the Software Development Teams.



BUSINESS SITUATION	SOLUTION DESCRIPTION	KEY BENEFITS
Formerly, email and other freeware collaborative tools were being employed which made it difficult to share knowledge and collaborate effectively with the various groups. The Central Architecture team wanted to build a portal that could serve as a showcase of knowledge sharing and collaboration for the rest of the organization.	<p>A knowledge-sharing and collaborative tool has been developed using SharePoint Portal 2003, which has served as a primary communication link within the Architecture team and with the geographically scattered Software Development Teams.</p> <p>Breadcrumb Taxonomy was implemented with the help of OOTB Sharepoint features.</p>	<ul style="list-style-type: none">§ Effective Communication Channel with a single point-of-access to all the data§ Flexible Document Management and easily searchable information§ Customized and up-to-date data which boosts productivity§ Effective collaboration tool with a marketing facet for the Architecture Team's services.

Company Overview

Our client is a financial services company committed to serving consumers and small to mid-sized businesses in 50 states. It is providing Banking and Financial Services to millions of households through multiple delivery channels. Its Home Loans Group is one of the nation's leading mortgage lenders and its Finance Group provides consumer finance and specialty commercial lending products.

Business Situation

The Central Architecture Team is a small, distributed internal architecture consulting group that interacts with and acts as glue between various IT and business group to ensure the successful delivery of complex technology projects.

The former email system and other freeware collaborative tools were making it difficult to share knowledge and collaborate effectively and effortlessly with the various organizational groups. A major chunk of important corporate knowledge landed in mailboxes and could easily be lost or deleted.

The Central Architecture Team wanted to build an online Portal that could allow it to communicate and collaborate with all the technical and business groups to facilitate delivery of tactical architecture, advisory and consultative services to project teams, as well as training services in new methodologies and technologies – hence serving as a benchmark of knowledge sharing and collaboration for the rest of the organization.

Solution Description

A feature map of SharePoint 2003 made it evident that it was a good fit for the task. The Central Architecture team management contacted Xavor Corporation, a Microsoft business partner, evangelizing SharePoint based portals through a marketing program in collaboration with Microsoft.

The Central Architecture team, being an elite group, was taken through an accelerated discovery and analysis process. Xavor team prepared a questionnaire for gathering information regarding the following:

- § Knowledge Sources
- § Taxonomy
- § Integration
- § User roles and security
- § Presently used collaboration tools

As it turned out, in the absence of a corporate standard, most of the valuable corporate knowledge was exchanged through a combination of Weblogs and Wickies, with a big chunk of knowledge ending up in individual mailboxes.

The architecture of the Central Architecture team portal delivered by Xavor was a flexible framework defining the focus areas of the Architecture group into following categories:

- § Initiatives
- § Projects
- § Training
- § Resources
- § Activities
- § Communities
- § Publications

Within each Category there could be any of the following functionalities

- § News
- § Events
- § Schedules
- § Document Library
- § Meeting minutes

Or any further functionality provided through a web part.

The secondary role of the Central Architecture team as technology evangelists required document authoring and cataloging on subjects of immediate interest to various

projects. A flexible and extendable taxonomy structure was provided to arrange and categorize the content.

The top page of the portal provides featured new documents added to the portal and Events or announcements of general interest. Links from this page also lead to the individual pages of the Central Architecture members. Here you will expect to find articles and artifacts in the special area of interest of this team member.

The Architecture Team Portal has served as the primary vehicle for information dissemination and creative collaboration amongst the Central Architecture group and with the Software Development Teams (SDTs) in a scenario where both the group members as well as their client IT organizations are geographically scattered.

The portal has acted as an effective document management tool with a marketing facet for the Central Architecture group's services.

Key Benefits

The Pilot program was declared an unqualified success on meeting the following success criteria:

Effective Communication Channel

Xavor's Portal solution has provided the company with a single point-of-access to all the data and applications information the Central Architecture team needs throughout the day, including projects, training, resources, e-mail and calendaring applications, schedules and meetings, publications, company news, and benefits information.

The SharePoint 2003 based portal has provided a communication channel for the client organizations to collaborate with the Central Architecture team members and acts as a perfect example for project-based collaboration. It presents visibility to the team's activities and creates awareness of the continuous project based contribution.

It has also allowed the Central Architecture team to deliver tactical architecture, advisory and consultative services to project teams, as well as training services in new methodologies and technologies.

Flexible Document Management

Xavor has automated the company's document authoring, review, and publication practices, and has enabled the Central Architecture team members to search more easily for information they need to improve productivity. The portal has provided a single media and focus for publishing content such as news, events, schedules and documents generated by the team.

The Central Architecture team can now save and check documents into the document store, capturing business-relevant metadata in Document Profile forms. The team also has access to features like Document Collaboration, Profiling, Lifecycle Management, and Web-based document management through a browser. Easy-to-use, document-management features have been delivered which are integrated with Microsoft Windows® Explorer and Microsoft Office applications.

Customized Information

SharePoint Portal Server has enabled the Central Architecture team to be more productive by providing immediate access to up-to-date, relevant information. The team members can now organize all the information, documents, and applications they access throughout the day in a single view on My Site.

Audience targeting enables Central Architecture team members to customize an experience for themselves based on their roles, hierarchy or interests - pushing relevant news, links, documents, applications and Web Services to the portal.