

Intranet Portal Creation for an International Software Solutions Company

The Challenge

An international software solutions company required an updated Enterprise Portal for their company.

The company had an existing intranet implemented in SharePoint 2003 which was not used to the best of its potential. They were looking to leverage the features of MOSS 2007 and Microsoft Office technologies to cater to its need for office automation and collaboration. Planet Technologies, a leader in SharePoint and MOSS 2007, developed a comprehensive Enterprise Portal solution to provide one portal for use by all stakeholders and departments within the company.

Portal Requirements

Develop and implement enterprise intranet portal for Client which enables:

- Company views based on management level in the company
- Process automation for all departments
- Enterprise collaboration
- Enterprise documents management
- Project Management
- Reports to monitor the progress in projects and processes

Key Technologies used

MOSS 2007, Office 2007, ASP.NET, SQL 2005, HR Office, Project Server

Solution

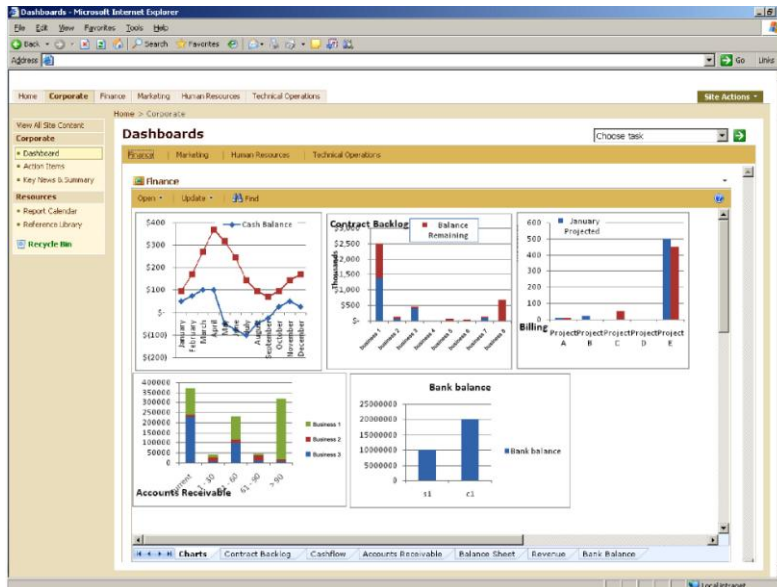
CEO Meeting

Planet consultants worked closely with the CEO of the company to determine his needs first.

He wanted a world view of his company with minimal navigation to get where he wanted to go.

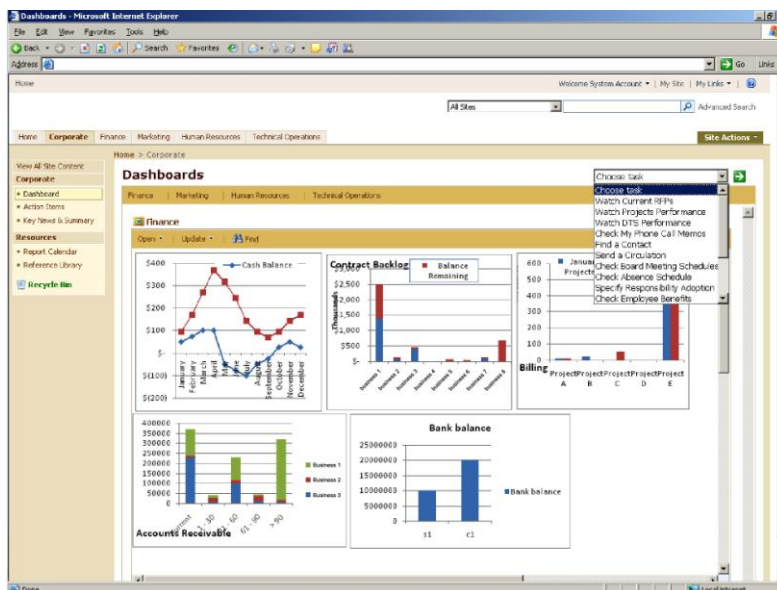
Design Objectives based on CEO meeting:

- Maximum content with minimum navigation.
- Custom built tabbed structure with AJAX type technology that doesn't continuously reload the page
- The ability to navigate to different dashboards, tasks and summaries without re-loading the page
- Quick view of:
 - Company performance & main departments performance through excel reports (Dashboards)
 - Executive Meetings, Discussions, Decisions, important Documents related to them. These all come from different sites (Custom built roll up webparts)
 - Tasks to be performed -assigned to CEO (Workflow tasks, Normal tasks like Lease renewal, etc) These tasks come from all over the portal from all depts. (custom built webparts)
 - Calendar - Organizational events or targeted to CEO view events (custom built webparts)
 - My calendar, My tasks, My Contacts – from Outlook [Any of the calendars from portal can be synched with outlook my calendar]
 - News aggregation - external & internal, video streaming, photo slides [News maintained in its own site. Quick view is provided with this aggregator, Video streaming external news, Photo slides etc] [Custom built webparts]
 - Project summary – Maintained in Technical operations is presented on corporate site through remote site connection. (Custom design for the content and Presentation webpart)



CFO/CEO Vision of Finance Department

- See all reports in single screen (account balance, billing, accounts receivable)
- Live connections to the data with no re-load needed.



Notice: Easy Drop Down Menu

- Additional Menu Options
- Based on Role

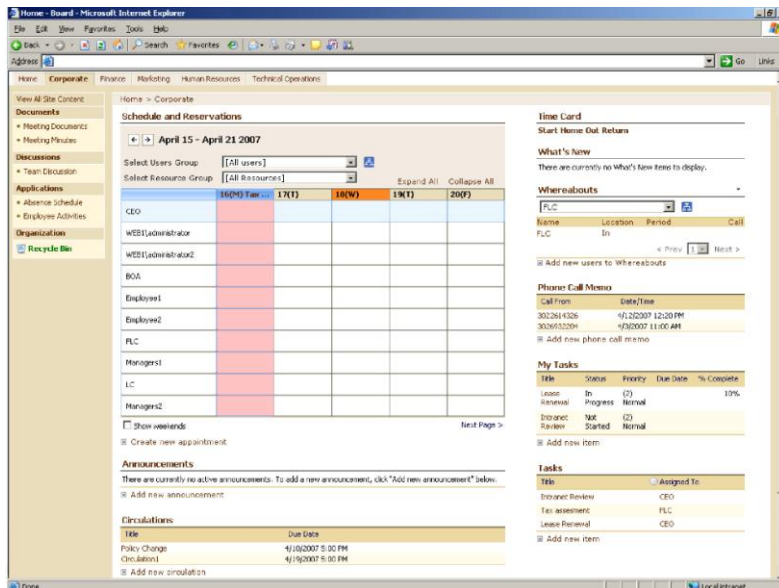
The CEO had a vision of what he wanted the rest of the company to be able to view. Based on these discussions, a tiered approach was created with a hierarchy featured on the dashboard. Depending on the management level of the user, they would be able to see at their level and below. For example, the CEO could view all levels of the portal through his dashboard but a director could only see their level and below.

Benefits to Leadership

- One Portal. One place. One vision of Truth.
- Dashboards give quick view of every department's statistics, the company's financial status, morale of employees, turnover ratio, project statuses, ability to collaborate, knowledge base, and a helpdesk.
- This at-a-glance, real-time view of the company enables executives to take immediate actions for corrections, and rectify, if lagging behind, the schedules in any projects.
- Using "one version of truth" concept, the CEO has the ability to have real time data (with statistics and analysis) graphically represented in the form of pie charts of all the departments of his company using business intelligent dashboards. Excel services integration with SharePoint. The data comes from various sources like SQL, and all third party applications (such as HR Office, PIW, Quickbooks) using Business Data Catalog.
- Company has a personalization for executives who can have me centric view of the portal. This allows executives to share the information buried deep down (due to access issues, etc) if they think that is relevant. They can also show the indicators to the employees personally if they wish.
- Company has a departmentalized approach of the portal for medium isolation and has a top corporate portal for collaboration among the executives.

Department Lead Meeting

Next, Planet met with the leaders of each department to determine the needs of each. Each department was able to customize their dashboard to meet their needs. Plus, each department received a collaboration team site.



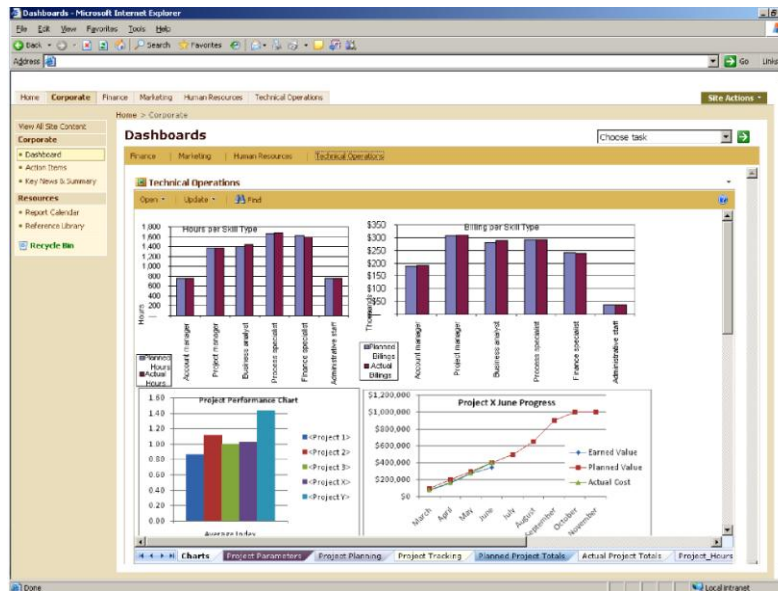
Home Page for All Teams

- Tracks daily attendance
- Integrated with Outlook
- Ability to check the calendar of everyone in company

Benefits for Departments

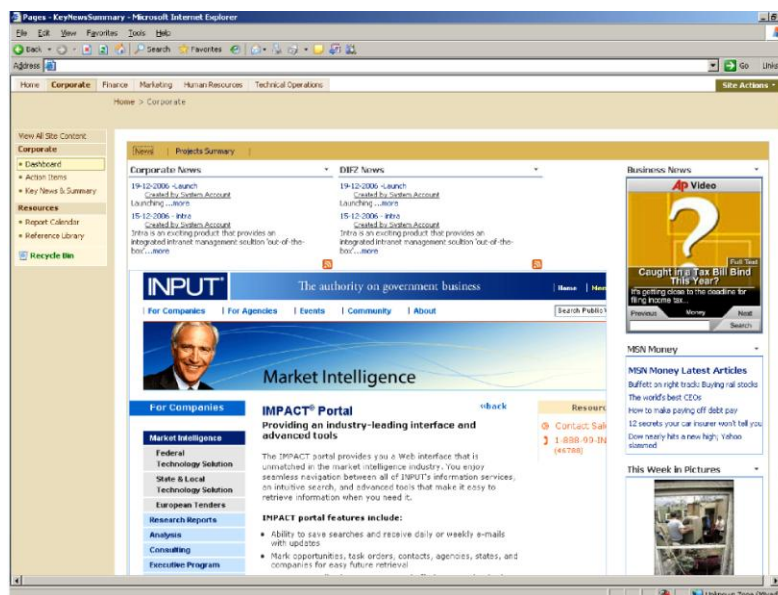
- Every department is an organization with itself and has the ability to share selective information at corporate level.
- Dashboards & Graphical reports for all the department heads.
- Each department has its own space for sharing and collaborating with people at all levels of that department.
- Company Intranet has a role-based content targeting.
- Company Intranet has audience set for enabling audience targeting.

Example of Department Dashboard:



Project Management Department: This department includes all project leads, developers, etc.

- Staffing Requests/Project, Funding
- KPI (key performance indicators)
- Report centers, Individual Project sites,
- Consolidates tasks from all project sites.
- Meeting workspaces
- All Based on Project Management Server



Internal News Site with External Sources

Planet Technologies
 2040 Observation Drive, suite 204
 Germantown, MD 20876
 (301) 721-0100