



CASE STUDY

IBS Creates SharePoint Roadmap to Globalize and Organize Client

THE CLIENT

A global manufacturer and marketer of office accessories and business machines designed to improve everyday life in the workplace.

THE CHALLENGE

The client was using an FTP site, network file folders, and emails to share information among business units, departments, vendors, and customers; however, each of these methods presented multiple issues.

The client used the FTP site to store larger files and files that their customers needed to access, but the FTP site was difficult to manage and there were security concerns. Having multiple file shares with different permission levels throughout the network drives made the documents difficult to manage and provided no versioning or indication of another user making modifications. When users emailed these documents back and forth, there was no way for them to know if they had the most current version of the document. Constantly sending these attachments back and forth caused email storage use to increase dramatically.

In addition to struggling to find information, the client was challenged with improving their corporate communications and intranet. The Vice President of Human Resources was spending 3-4 days putting together a corporate newsletter.

THE SOLUTION

Over the course of a month, Interactive Business System (IBS) met with 15 global business units to identify common issues facing the users. Throughout the discussions with the business units, IBS was able to identify recurring themes regarding the issues users experienced, as well as some commonly requested functionality that would help them work smarter.

At the end of these discussions, IBS developed a SharePoint implementation roadmap. This roadmap included ensuring the client's customers had easy and secure access to their documents, improving the permissions and versioning of documents, and implementing collaboration functionality to eliminate the need to email documents back and forth. Quick wins included an online training registration app, employee central news app and newsletter creation app.

IBS implemented the following out-of-the-box SharePoint functionality:

- Search
- Managed Metadata
- Site Columns
- Content Types

TECHNOLOGIES USED

- SharePoint 2013
- SharePoint Online
- JavaScript (REST API and CSOM)
- HTML
- CSS
- SharePoint Workflow
- SharePoint Designer



Custom solutions included:

- Online Training Registration was created using JavaScript and SharePoint lists and pages
- Newsletter Creation using JavaScript (SharePoint REST API), HTML and CSS which enabled users to have a much more modern view of SharePoint Announcements and dramatically reduced the effort involved in creating printed newsletters for employees without access to the intranet
- Employee News web part that provides a more individual user focused experience in a slider type web part using JavaScript (CSOM), HTML and CSS

THE RESULT

The client now has a SharePoint system in place that allows users to be self-sufficient in managing content, while also providing versioning, publishing, and metadata management on items. Many of the documents that were stored on the file shares are now housed in the SharePoint environment and are tagged and labeled with the appropriate metadata to make them easily sortable, filterable, and searchable. This has resulted in a significant decrease in email usage and instances of users not being able to find the most current document.

Corporate communications are now displayed in a modern web format using a similar look and feel to Yahoo's home page. The communications are managed by pre-defined contributors to ensure the content is consistently updated. The site also allows different business units to place important messages for their teams directly on their respective home pages, effectively keeping the content relevant for the users accessing the site.

The Online Training Registration allows users to quickly and easily register for classes freeing up time for the training team to focus on class materials.

The Corporate Newsletter now takes less than a day for the VP of HR to create. For the facilities where internet access is not available to the workers, the facility admins can easily print and post the newsletter.

IBS' SharePoint Roadmap introduced a phased approach for delivering functionality. Phase 1 focused on improving internal and external collaboration, providing a centralized spot for global communications and streamlining processes such as training registration and newsletter creation. The framework is in place for future growth.

OTHER BENEFITS

- **More modern look and feel:** implementing responsive design patterns resulted in the client having the ability to view their sites on any number of mobile devices.
- **Manageable taxonomy:** by identifying "Term Store Owners," all users have the ability to "tag" documents and the owners have the ability to allow others to contribute to the term store at their discretion, providing a full service taxonomy solution.
- **Global feel:** the client now has the ability to present the site and specific content in the native language of the users. This provides the non-English speaking users with a sense of inclusion that was previously absent.

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Newsfeed OneDrive Sites System Account

BROWSE PAGE SHARE FOLLOW

Home Teams Employee Central External Portal EDIT LINKS Search this site

CORPORATE INFORMATION

Who We Are

Code of Conduct GIVE

Our Strategy

INNOVATION IN MOTION™ 3 YEAR PLAN

Brands Awards & Recognition

Policies & Procedures Locations

Org Charts Global Holidays

Newsfeed OneDrive Sites System Account

BROWSE PAGE SHARE FOLLOW SYNC

Home Teams Employee Central External Portal EDIT LINKS Search this site

Home Documents (Public) Docs (IT Only) Projects Demand Teams Announcements Useful Links Calendar Contacts Recent Provide Feedback Site Contents EDIT LINKS

INFORMATION TECHNOLOGY

Announcements

new announcement or edit this list

Title Modified

There are no items to show in this view of the "Announcements" list.

Documents

new document or drag files here

Name	Modified	Modified By
Communications	August 10, 2015	Stamos, Bill
Dashboards	August 10, 2015	Stamos, Bill
Documentation	November 16, 2015	Stamos, Bill
Formz	August 10, 2015	Stamos, Bill
Policies	August 10, 2015	Stamos, Bill
Procedures	August 10, 2015	Stamos, Bill

eCom GBS

GDW INFRA

PMO CC

Useful Links

new link or edit this list

Edit URL Notes

There are no items to show in this view of the "Useful Links" list.

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