

## Enterprise Portals

Have you ever stopped to think about all the information that you encounter or need as part of your normal work day? If you have, you probably recognized that there are many types, formats, owners and repositories. And, you may also recognize the importance of this same information to others within your organization, or with partners, suppliers and customers that work with you.

Enterprise Portals are a modern, flexible and effective way to organize, control, manage and maintain unstructured data, and provide a central access point to the structured data that has value to you. Portals also provide a dynamic and efficient means to rapidly share a wide variety of information using a web-based approach.

Type	Example
Unstructured	Microsoft® Office documents, PDF documents, web content, pictures, announcements, calendars, etc.
Structured	Data stored in database management systems, such as HR, ERP, and other business applications

One of the leading Enterprise Portal solutions is the Microsoft Office SharePoint Server 2007® (MOSS 2007). It includes the core functionality to allow managing a wide variety of data types, and also includes important capabilities that are vital to any business-class system:

- Highly configurable and extensible
- Fully integrated security model
- Business-class search functionality
- Workflow functionality
- Integrated collaboration capabilities
- Broad range of “out-of-the-box” capabilities
- Enhanced capabilities through 3<sup>rd</sup>-party components or custom programming
- Configurable for intranet, extranet, or Internet usage

### Effective Knowledge Management

MOSS 2007 can reshape and improve the flow of data, enhancing your usage of information assets.

**Communication** – as a web site routinely viewed by company employees, it has easy methods of publishing web content, and provides useful functions to display dynamic information or interact with employees by using features such as surveys.

**Document Management** – organize and control documents in libraries, providing attribute driven views that help users quickly find the right information. Keep versions, utilize check-in/check-out features, formalize approvals, attach to workflows, manage document expiration dates and enable user notifications. All of these features help improve the effectiveness of your people.

**List Management** – create, share and manage lists of data that are useful to your organization but are not located within other systems. Contact lists, tasks, discussion boards and picture libraries are a few examples of data elements that can form an effective data set for a team.

**Collaboration** – enhance and streamline the means by which teams communicate by deploying team sites, Wiki pages, blogs and team calendars. Utilize RSS feeds and Microsoft Outlook® integration to improve information flow and accelerate access.

**Workflow Automation** – automate and enforce business rules. Ensure that data are captured correctly, the right people approve data, and that people are informed about key data driven events.

**Search** – full text indexing across MOSS 2007 libraries and lists, plus other repositories such as share drives, database systems and public web sites. Search helps users find information quickly and efficiently to improve knowledge management.

**Forms** – publish forms for capturing a wide range of data, and control the review and approval of those forms through workflow concepts.

**Data Access** – expose data from business systems for improved accessibility.

**Dashboards** – expose Key Performance Indicators and other metrics that allow people to see important business drivers.

**Reporting** – publish reports in document libraries, managing access and content freshness.

## **Implementing MOSS 2007**

The full benefits to any technology are realized only if the technology supports the business. With this in mind, MOSS 2007 implementations are most effective when the businesses goals and objectives are well understood. Chartwell IT's services help you define how your organization can benefit from a portal solution by understanding your priorities and what you hope to achieve through improved knowledge management.

Once goals and objectives are understood, the next steps are to define the usage strategy and infrastructure plan that allows you to deploy a solution that meets the needs of each target audience.

MOSS 2007 runs on server-class technologies, specifically web servers for hosting the application and database servers for storing data. When designing the portal infrastructure, proper consideration must be made to match performance, growth, availability and disaster recovery to the standards and expectations of the organization.

Also, data access and security are important considerations. In many implementations, the data available in the portal is exposed only within your organization (intranet). But, other audiences can also be served. Data can be made available "outside of the firewall" for limited access by your mobile workforce, made available to partners via the Internet or an extranet, or made publically available. These deployment choices allow unique ways of publishing or receiving information in support of each audience.

Once a sound infrastructure is in place, the focus turns to the MOSS 2007 functionality that will deliver the greatest benefit and achieve the business goals. Properly defining the structure of the application, site configuration choices and standards, deployed features, look-and-feel, and other factors enable the system users to operate efficiently and effectively.

## **Choosing the Right Approach**

Chartwell IT can be your partner in each aspect of your portal implementation effort. We provide services for:

- Business case development
- MOSS 2007 orientation
- MOSS 2007 usage strategy
- Architecture planning
- Infrastructure definition
- Implementation and rollout services
- Standards, taxonomy and governance definition
- Look-and-feel and branding (master pages and styles)
- SharePoint solution development including:
  - 3<sup>rd</sup> party component research and selection
  - Web parts, .Net™ controls and custom SharePoint web page development
  - Custom workflow development
  - Custom site and list definition
  - Event receivers and template development
- Business system integration
- Search service implementation and customization

Chartwell IT can also provide guidance to your Change Management team that will improve the level of adoption and acceptance, critical factors in achieving your stated goals.

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