



## Philanthropic Consulting Firm Successfully Realizes Document Management Goals with Microsoft SharePoint 2010

SMBology's client is a private philanthropic organization responsible for managing and administering charitable programs worldwide.

The firm had a significant amount of programs to manage, each involving large amounts of data for each charitable account. However, content was poorly organized within network files, making it difficult to search and find documents. In addition, the firm required its online submission forms be stored in a single location along with the company's complex program manuals. User permissions also needed to be managed, as security was a concern.

A secure company Intranet was created using SharePoint 2010. Metadata tagging was used to organize documents and enhance document search ability. Forms were built and designed to submit all data to a secure site. Program manuals were published to the Intranet, providing central, user-friendly access while limiting editing abilities. User permissions were also set up, preventing unwanted access to specific content.

### Results

- Improved document management
- Greatly enhanced search
- Increased document/data security
- Streamlined business processes & data forms

### Technologies Used

- SharePoint Server 2010
- SharePoint Designer 2010
- InfoPath Form Services 2010
- Visual Studio 2008

### Company Overview

SMBology's client is a private philanthropic consulting firm with offices in both New York City and Washington, D.C. that creates and administers strategic programs of giving adapted to best serve its clients' various philanthropic goals. Managing charitable programs worldwide, services include donor education, grant administration, reporting, as well as introducing applicable funding opportunities.

### Business Challenge

The firm had multiple philanthropic programs to manage, all involving large amounts of documents specifically related to each account. At this time, materials were stored inside the firm's network folders with little organization, making document management difficult. With the objective of being able to associate documents to their respective programs, the firm needed to be able to tag documents with multiple attributes to help increase search ability and categorization.

In addition, the firm required one central place for users to submit several online forms related to the programs and contributions. These submissions had to be securely tracked and the request needed to be directed internally to the appropriate person, which included sending notifications and alerts.

Moreover, SMBology's client was comprised of several internal departments, all of which required access to large company-wide documents and complex philanthropic program manuals. In hopes to better manage these organizational materials, a centralized location was required to store these extensive documents (with each manual consisting of over 500+ pages). In addition, the firm needed to limit user permissions as well as control document versioning and authoring, as this was currently not being managed.

### SMBology Solution

SMBology has been successfully leading the way in employing specialized SharePoint solutions and recommended implementing a custom Intranet site to better manage the firm's programs and related company materials. Developed using SharePoint Server 2010, SMBology applied SharePoint's advanced metadata tagging and keyword abilities to associate documents with multiple key attributes to allow document categorization and effective search.

The Term Store Metadata feature was effectively utilized to set up hierarchical taxonomy (an advanced tagging feature) for all content added to the SharePoint site, such as documents and announcements. Through this method of implementation, the taxonomy was able to be centrally managed only by site administrators and the attributes could be applied universally across the site for all documents and content added to SharePoint. Using SharePoint's

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sophisticated search abilities, these tags could be indexed to enable better document search. Additionally, the search feature was further customized to allow for the search of critical documents from disparate locations, such as materials stored on the firm's network share.

All internal form submissions were re-built using Microsoft InfoPath Forms. These forms were set up to submit data to a secure administrative site in which workflows were developed to manage data submissions in a safe, secure and effective way. In addition, internal processes, such as vacation requests, were improved by designing custom workflows to create email alerts/direct requests to the appropriate person based upon the specific user submitting the form itself.

To provide central, easy access to firm's complex manuals while at the same time eliminating the problem of having multiple versions of the same document, company manuals were re-built using publishing pages with SharePoint's advanced content editing features. As such, employees could only view the latest document version, with only a few people given editing abilities in order to control authoring. All content within these documents was searchable and for quick navigation, a table of contents containing active links was created for each manual. The Intranet also served as a platform for all users to collaborate on various discussion forums, blogs or add to the extensive wiki knowledge base.

SMBology thus designed a site with restricted permissions that controlled user access to site content, isolated content across departments and programs, maintained document attributes universally from a central location while performing all business functions from a single collaborative platform.

## Results

Successfully deploying a secure, company-wide Intranet, the philanthropic consulting firm was able to better manage large amounts of internal data and documents. Creating a centralized taxonomy structure allowed the firm to easily keep track and implement attributes for all documents and site content, significantly aiding with document categorization. Additionally, SMBology's client was able to effectively search and locate documents stored on both the portal as well as on its internal network (disparate location) via SharePoint portal search, providing greater workforce efficiency. Finally, by placing all internal forms and manuals on the SharePoint Intranet, the company was able to maintain and streamline all of the data and processes associated with these items in a safe and secure way.

SMBology, Inc. is a growth-oriented IT firm offering strategic consulting, user experience design, and custom application development. Clients benefit from our focus on easy-to-use technology, a deep understanding of the human user, and keen business acumen. This focus, paired with our deep technical expertise and broad service offering, enables us to take your company further than you ever imagined.

