

PSC SharePoint Case Study



Using SharePoint for Simplicity, Search, & Security

The Problem – Finding relevant information was impossible

The Client, a private equity firm, was utilizing an external executive research and recruiting firm to learn about organizational structures and their executive staff. The information that was gathered as part of these searches, although highly valuable, was being stored in email and on file servers. Consequently, the information was often lost or misplaced, requiring the researching agents to repeat the entire process. A companion issue was the massive amount of documents and information sent through email was taxing the mail servers and storage. Collectively, the process was costly and resource intensive, wasted time and resources, and added unnecessary security risks.

The Analysis – Understanding the key success factors

While reviewing the executive research process, PSC soon learned that in addition to the storage issues, there were other processes including teleconferences, redundant emails, and briefings associated with the information. It was also observed that when the data was located, there was no way to search across the content to produce any predictable results. The research firm and other partners needed to gain access to the information through a secure and easy-to-use mechanism. The current method -- sending emails to all constituents involved in a project, was inadequate. This again posed a number of data retention issues, potential security risks, and surfaced the idea that there wasn't a central location for the information.

To put the problems the business was experiencing into a workable context, PSC defined them using the following key success factors:

Simplicity. The primary reason email was still being used was its simplicity. The participants in the process didn't have much time for improving the process or investigating a new method of information delivery. Because of this it was imperative to create an easy, yet powerful solution for accessing the information anywhere, at anytime.

Search. With users sifting through hundreds of documents and emails to find a particular candidate, the need for a powerful search capability became abundantly clear. Searching was a time consuming task that directly equated to money lost for each minute spent. Searching by filename was not enough. The ability to search within the document itself as well as the attached metadata was clearly an important requirement.

Security. During a candidate search, the information about the prospective candidate needs to be both secure and confidential. If the information was lost or miscommunicated, this could potentially stop the project altogether. Should this occur, it may well cost the company millions of dollars.

The Solution – An easy-to-use, searchable repository available anywhere!

Microsoft Office SharePoint Server (MOSS) was chosen as the best way to provide all users access to the information anywhere. Using the collaboration features and metadata features of MOSS, the portal was constructed to allow the executive search researchers to upload documents, create executive profiles and track project schedules and progress. By creating custom content types the researchers were able to quickly create profiles for candidates and companies. This allowed the associates to quickly search, filter, and sort on the information in the system.

The researchers were also able to upload existing documents and add new documents and files to the system. Editing and saving the documents was made simpler by storing them in the central portal. Changes that were made could be reviewed immediately by anyone with access to the site. The MOSS search engine proved to be very powerful as searches could be made by file name, properties, terms, or references inside the document.

The portal's 256-bit encryption over HTTP was very secure and met the Client's needs by utilizing role based groups and permissions. Users could be assigned specific roles that kept them from editing documents, thus maintaining the integrity of the information through the entire project life cycle.

The Technology

- Microsoft Office SharePoint Server 2007

The Benefits

- Reduced Search Time
- Greater Simplicity
- Better Security



PSC Group, LLC is an information-technology and professional services consulting firm that specializes in business process architecture and back-end integration. We have extensive experience and expertise in the melding of collaboration products with a variety of applications, processes and systems including ERP, CRM, PLM, and Workflow.

When it comes to information management and control of business processes, PSC can provide you with a competitive advantage through the smart application of technology.

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