Connecting the Information Dots

A Webinar Series for International Not-For-Profit Organizations
Our Lens

• Management of Information
  – Project/Program
  – Archival
  – Operational
  – Financial

• Solutions implemented by our member organizations

• Interesting products from various vendors
Our Lens Filter

• International Not-For-Profit Organizations
• Low Resource Areas, the Edge of the Network
• Products that are relatively new or not widely used
• “…don’t reinvent the wheel…”

http://www.edgeof.net/
# Webinar Series

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Topic</th>
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<tbody>
<tr>
<td>Tues, July 16th @ 11:30AM - 12:45PM EDT</td>
<td>SharePoint – Leveraging our Investment</td>
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<tr>
<td>Weds, July 31st @ 11:30AM - 12:45PM EDT</td>
<td>Global Accounting</td>
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<tr>
<td>Tues, Aug 13th @ 11:30AM - 12:45PM EDT</td>
<td>Project Management using PMD Pro 1, SmartSheet</td>
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<tr>
<td>Tues, Aug 27th @ 11:30AM - 12:45PM EDT</td>
<td>An Integrated Approach to Award and SubAward Management</td>
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Questions

• Type your questions in the QUESTIONS box of the control panel. We’ll ask the presenters to respond to timely questions during their presentation. We’ll address the rest of the questions at the end of webinar.

• By default, your microphone is muted. Because we have so many attendees, we’ll keep everyone muted throughout the webinar.
Webinar Recording

• We’ll be recording the webinars in our series
• We’ll make these recordings available to those who attended the webinars first, and eventually to the general public
Today’s Webinar

SharePoint
Leveraging our Investment

Kyle Conquy
ECM Practice Director, Net@Work

Julia Cleaver
Manager, Knowledge Services, Ipas

Julie Grubbs
Knowledge Services & Information Technology Coordinator, Ipas

Moderators: Bill Lester, Executive Director at NPOKI
Igal Rabinovich, CEO at n-Village
Let’s Take Two Quick Polls!

• We want to learn about your organization
• We want to learn about SharePoint at your organization
Agenda

- Examples of 3rd party products being used with SharePoint
- Historically what functionality have 3rd party solutions addressed?
- How to approach this decision
- Case Study 1 – A successful SharePoint Implementation (Ipas)
- Case Study 2 – Minimizing the 3rd party footprint (Goodwill / Net@Work)
- Case Study 3 – SharePoint & n-Village, using the best of both
- What it boils down to
- Q&A
• **Leading 3rd party products being used with SharePoint**
  – Yammer – Social Networking / Collaboration
  – NewsGator – Social Networking / Collaboration
  – Nintex – Workflow and Forms
  – Bamboo Solutions – Web Parts & Tools
  – Dell / Quest Software – Admin Tools
  – Many Others
Presenta&on

• Historically users have looked for solutions to augment SharePoint for the following reasons;
  – Mobile
  – Social
  – Cloud
  – User Experience
• How to approach this decision
  – What is the business need? Why am I looking for an additional solution?
  – Is there a clear objective?
  – Are expectations reasonable?
  – Have I looked at possible non-system changes that could close the gap?
  – What will it take to close the gap with existing tools?
  – What will it take to close the gap with new tools?
  – Which approach will give the highest degree of user adoption?
  – Do I have executive buy in?
  – Do I have the right team for the project to implement and then support?
• Case Study 1 – A successful SharePoint Implementation
Ipas’ recipe for success

• Dedicated staff and IT resources
• UX-driven implementation
• Reinforcing use
Dedicated staff and IT resources

- Information Architect
- Training and cheerleading
- Power users
- Riverbed device
UX-driven implementation

• Role of power users
• Dedicated time with teams
• Bamboo web app
Example
<table>
<thead>
<tr>
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<td>Terra</td>
<td>Paper Form Training (Chapel Hill, NC)</td>
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<td>Reporting Training for NI</td>
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<td>Paper Form Training (Chapel Hill)</td>
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Reinforcing use of SharePoint

• Turned off shared drive
• Power users as first line of defense
• Recognition and visibility of SharePoint
Looking ahead

• Social
• Integration
• Portals and dashboards
• Transition to SharePoint 2013
Case Study 2 – Minimizing the 3rd party footprint (Goodwill / Net@Work)

Objective & Environment:

- To implement a document management/records management solution for the Accounting and HR departments.
  - Reduce the amount of physical paper used.
  - Electronically store all documentation/records.
  - Validate against information stored in both systems.

- SP was primarily used for general collaboration
– Pain Points and Concerns

• The Accounting and HR departments were using two separate systems.
• Each system had different 3rd party software packages that integrated, but each only had some of the features required.
• Managing multiple systems would put a burden on the IT team and budget.
• The document automation needed to cross both departments and scale to other department in the future.
• Needed to validate document tagging against the ERP and HR systems.
• Needed to account for very specific corporate procedures.
• All paper forms needed to be converted to web forms with the ability to sign electronically.
• It was incorrectly believed that SharePoint would need many 3rd party add-ons to achieve business objectives.
– The Solution:

• Educated organization on what SharePoint could actually do, allowing them to leverage their investment.
  – Organization’s perception was not accurate

• We explored the best way to use the investment they already made as well as future requirements. Together we re-focused the team to take advantage of SP strengths and only selected 3rd party solutions that were strategic to long term growth.

• Final design was an expanded use of the existing SharePoint with a reduced 3rd party footprint to handle signature capture and automated OCR only.
Presentation
Presentation
Presentation
Presentation

Work Experience Consent

I understand that I am involved, for a limited time, in a Work Experience through Net@Work.

(Number of Hours Worked) X ($11 per hour)

I further understand that I am:
- NOT a permanent employee.
- NOT entitled to vacation or sick leave benefits.
- NOT eligible for unemployment benefits when the work experience ends.
- I am Covered by Workers’ Compensation.

I understand that this Work Experience will NOT extend longer than 500 hours.

I consent to participating in this program with the stipulations outlined above.

[Signature]

7/15/2013
Date

Participant
• Case Study 3 – SharePoint & n-Village, using the best of both for a national NFP medical membership association

– Project Objective – Automate the book publishing process

– Project Governance
  • Incorporate the book process into a larger content management strategy
  • Leverage the existing SharePoint investment
  • Online editing is preferable to just attaching documents
  • Leverage the investment in this project to drive future revenue streams by providing NFP’s content via web services
– We reviewed a number of approaches to the stated project objective and governance strategy
  • Use a publishing specific tool (like ScholarOne)
  • Use only SharePoint
  • Use n-Village in combination with SharePoint
– Key points that drove the design process
  • A large and diverse external community of authors and content consumers
  • Online editing was preferable to moving documents around
Recommended Solution – benefits of using n-Village in combination with SharePoint

- Centralize all KM and Electronic Content Management in one Digital Library
- Manage all audience intelligence centrally – who sees what, when and where
- Manage all publications centrally – books, magazines, articles, newsletters, eBooks, portals, hubs, web services, etc.
- Can support future enablement of external web services
- Integration with CRM and SharePoint
- Online editing or document management
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Example

Activity Stream

Add a status update...

Vince Noir

Status Updated - Custom Service Quotation

Quisque vitae lectus nibh. Donec est et est, molestie sed omare vitae, elementum in libero. Vivamus sagittis, libero ut egetas rhoncus, risus ipsum ullamts mauris.

View Option Link • 42 min

7 replies

Add a reply...

Sally Smith

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Aenean tellus ipsum, tristique ac lobortis sit amet, aliquam at arcu.

View Option Link • 16 min

Peter Jones

Aenean tellus ipsum, tristique ac lobortis sit amet, aliquam at arcu. Vestibulum ac dapibus ligula.

View Option Link • 26 min

Key Team Members

Vince Noir

Specialist

Peter Jones

Specialist

Sally Smith

Admin Assistant
Submission

1. Read Information
   These are the instructions to be followed to complete the task.

2. System Access
   Links to Other Tools

3. Reference Resources
   Key Documents for this step

4. Upload Resources
   Uploaded: 2012-12-07
   Added by Tim Sewell
KM - **Deliver the**

**Right Information** to the

**Right Person** at the

**Right Time** in the

**Right Format**.
• What it boils down to
  • Define your needs
  • Know your audience
  • Focus on user experience
  • Select the right tools for the job
  • Give it TLC
Q & A
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<td><a href="mailto:KConquy@netatwork.com">KConquy@netatwork.com</a></td>
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<td>Julia Cleaver</td>
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<tr>
<td>Bill Lester</td>
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