Microsoft SharePoint 2003

Project Overview

Our client is one of the top 10 banks in the world engaged primarily in banking, investment banking and investment management. As with most businesses, responsibility for information management across and within business divisions lies with its employees.

The organisation decided to use Microsoft SharePoint Services to provide up to date and focused information about all divisions, creating a scalable document management and data collaboration platform.

There was an immediate need for a solution to enable document management, collaborative working across the organisations and creation and maintenance of Intranet web content.

Our services were engaged to deliver a solution which ensured all authorised users had a good working knowledge of SharePoint, including an understanding of how the new software would affect their existing content and all future data collaboration.

The Solution

During consultancy phase key processes and procedures were identified allowing us to tailor and target training in the correct areas. This was a big culture change for the organisation, requiring the implementation of organisational structure, policies and guidelines, and the utilisation of templates. Therefore our solution needed to support employees through this change process.

Part of the training focused on raising the profile of training as a key component to underpin success thereby maximising Return on Investment. Individual requirements were addressed and all users gained the knowledge required to manage their own web content on the client Intranet. Consequently, this created workspaces which enhanced data collaboration between project teams.

Three courses (Page Owner, Publisher and Consumer) were developed. Users attended a one day course focusing on the key principles of SharePoint working on a Portal level and a Workspace level.

Tailored training documentation was developed in the form of three quick reference guides, designed to reflect the functions of SharePoint relevant to each job role including hints & tips, common features and shortcuts. A detailed training manual was written stud published on the client Intranet.
Training was initially rolled out to 150 users within the Private Clients division.

Snapshot of Project:

Client
- Financial Services – top 10 Bank

Project
- Microsoft SharePoint 2003 – document management, data collaboration and web content management

Solution
- Three courses - Page Owner, Publisher and Consumer - were developed. Users attended a one day course focusing on the key principles of SharePoint working on a Portal level and a Workspace level

- Courses supported by training manual made available on Intranet, as well as relevant Quick Reference Guides

Project achievements:

- Despite a challenging deadline, a complete bespoke training solution was delivered on-time and to budget

- All users understood and could effectively use SharePoint to manage web content and workspace data collaboration

- Overall, the training solution has given the client:

    o Document configuration management including filing and version control

    o Team communications

    o Knowledge management

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SOLUTIONS