Document Management Portal

A customized MOSS 2007 solution – site branding, web parts

Executive Summary

The customer's business generated a huge number of documents every day, with a variety of multiple applications and ad hoc mechanisms in place for document management function. The customer approached Mindfire Solutions for an end-to-end solution to his existing problems and foreseeable needs. Mindfire understood the customer's perspective, a clear need for an IT investment leading to a positive ROI and low cost of ownership – a solution leading to better managed information, increased productivity of users and reduced costs, by building a core document management function which is central, secure, easy to restore and supports easy versioning, searching, sharing, and collaboration. Mindfire analyzed requirements, recommended feasible solutions, helped in decision-making, before developing the final solution based on Microsoft SharePoint Portal Server 2007, which further benefited the customer with a natural ease to implement business workflows.

About our Client

Client   Chocolate Confectionery company | **Location**   Luxemburg, Belgium | **Industry**   FMCG

Business Situation

The customer had clear issues with existing ways to manage various different documents, ad hoc measures with multiple applications, rules, and measures in places, which caused reduced productivity, time spent on unnecessary activities, and crucial business knowledge kept with individuals rather than the systems in place. Mindfire analyzed the requirements, found a suitable solution as the development of an extranet document management portal based on MOSS 2007 to help the customer to migrate, maintain, view, and search the documents based on user permissions.

Mindfire responded to customer's resolve to migrate to the new system within a tight timeframe, with a strong commitment to delivery of final test release (for training purposes), thereby succeeding production release.

Solution Details

The Mindfire Solution

It was important to replicate certain functions and security settings of the existing/prior applications to allow the users an easier transition to the new systems. In addition, the existing sets of documents, maintained in folder hierarchies were to be migrated using similar hierarchies in the developing MOSS 2007 portal. This required and led to analysis and comprehension of the existing structure, and successively to design of new structure and data flows involving custom development on MOSS 2007 due to lack of out of the box SharePoint features compatible to customer requirements. The client approval on the proposed new structure and data flows led to the creation of the architectural design, which rested on a MOSS 2007 website with custom site branding for the desired look and feel, and custom web part solutions to implement desired functionalities.

We came up with simple data and security models. The security model included multiple user groups falling between two extremes, Admin and Guest. The Admin role allows all rights to users including adding, modifying, and deleting rights to documents, whereas the Guest role allows to view-only rights to documents. The data model included:

- *Document Type* **-** associated with zero or more folders, to appear on the top navigation menu
- *Folder* - containing zero/ more attributes, associated with a folder, to appear as drop downs on LHS
- *Attributes* - associated with zero or more documents and appear as values in the folder drop down list
- *Document* - the main content to upload, associated with zero or more attributes
- *Attachments* - Documents can be associated with 0 or more attachments, stored in a separate list with DocumentID as the look-up reference
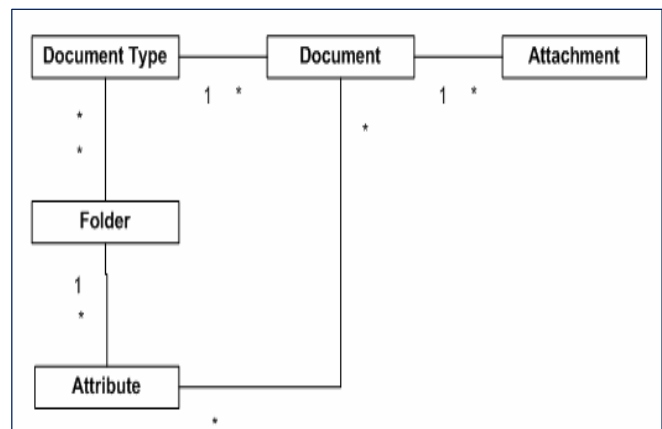
Achievements

- The **Search Document** custom web part provides increased ability for users to locate the information they need. It allows real time searching and reporting, seeking information through hundreds of thousands of documents in different folders, with consideration to user-permissions based on role.

- The **Document Views/Details** custom web part enhances the display function, with customized document views – read only, attachment views, summary views, detailed views etc.

- We developed a **Custom Search** solution, using SharePoint search scope & rules, to execute full-text search confined to document library, accounting for user level permissions defined on attributes and documents.

- We designed a **Custom Workflow** solution, consumed by the Document Library to execute all document approval tasks – An added advantage to the customer, as it automated the manual process followed earlier.

Technologies

MOSS 2007, ASP.Net 2.0 & 3.5, C#.Net, ASP AJAX 1.0, CSS, JavaScript, SQL 2005, WSP Builder

Final Results

Software System

Customer Benefits

The production system results have clearly shown positive results, better managed information, increased productivity of users, and reduced costs – the primary goals the customer had set out to achieve. The custom search functionality continues to benefit the users, as they are able to retrieve particular documents from the library and locate specific information in only about 10% of the time it took them earlier. The inclusion and automation of the approval process workflow has opened up possibilities for further improvements.

Future relationship

Our high-quality performance on the Document Management Portal project has generated a second project for Mindfire team from the same customer, a set of data-retrieval interfaces to a complex Content Management System.