

# Document Management Case Study



## Microsoft Office SharePoint Server 2007 Helps to Reduce Information Search and Retrieval Time

### The Problem – *So much information, so little time!*

A global brokerage firm with offices located in major financial centers around the world had a critical need to get their documentation under control. Different areas of the IT department were storing documentation in a variety of folders across the local and wide area networks -- making them increasingly hard to find. Adding to the problem were multiple copies of some documents strewn across the network. Knowing which copy of any given document was the most recent was becoming a challenge.

### The Analysis

The documentation required to support growing financial services organizations is immense. Regulations and global coordination require constant communication among all team members, so gaining control of their documentation was clearly becoming a productivity issue. Having extensive documentation readily available regarding their policies, systems and processes was essential for audit compliance, risk mitigation and efficient daily operation. Clearly, a reliable document repository would be a vital component of their overall business process.

### The Solution – *A Document Repository*

PSC suggested that the client consider Microsoft Office SharePoint Server to help organize and gain control over their documentation. PSC helped the client leverage SharePoint's integrated portfolio of collaboration and communication services to create a document repository informational structure leveraging workflows and custom metadata tags to connect people, information, processes, and systems both within and beyond the organizational firewall.

Microsoft Office SharePoint Server offered search, document versioning, audit trail, expiration policy, and check-in/check-out services to directly address other pressing document management issues. Microsoft Office SharePoint Server was used to create portals for each of the departments to author and access standard operating procedures, documents, spreadsheets, diagrams and other files that were vital to the departments and daily enterprise wide business functions.

Another feature of this project was the extensive use Content Types for Metadata. This provided a way to standardize document characteristics across different libraries and sites throughout the organization and provides a way to categorize content in a standard manner. Content Types, a new feature of Windows SharePoint Server 2007, allows you to pre-define metadata templates so that all documents of a given type are assigned appropriate metadata and business rules such as workflow, resulting actions, expiration, and other policies. Based on the selected content type some of the metadata properties are already present in the new document.

The client now has better organization and search services that allowed their staff to find the documents based on correctly applied content sources and keywords they needed in a more efficient and scalable manner.

#### **The Technology**

- Microsoft Office SharePoint Server 2007

#### **The Benefits**

- Reduction in information search and retrieval time
- Reduced duplicate storage costs
- Increased quality of content



It's all in the way we listen.®

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 in the integration of Microsoft products with a variety of applications, processes and systems including ERP, CRM, Portal, 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.

#### **CONTACT**

Rick Parham  
office: 800.592.8003  
direct: 847.969.8464  
[rparham@psclistsens.com](mailto:rparham@psclistsens.com)

PSC Group, LLC  
Chicago, Kansas City, Minneapolis  
[www.psclistsens.com](http://www.psclistsens.com)

It's all in the way we listen.®

