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When the calendar in past years turned to January at the southeastern hotel management company, Bob, the Controller, knew it wouldn't be long before some of his payroll staff would start complaining. How could they handle all their year-end work, they would ask, once company employees started calling in with their annual questions and requests? There were 450 employees, and it was always a deadline bottleneck this time of year. But 2010 was going to be different and Bob, rarely one to smile much, was already confusing his team by whistling while he worked.

By the third week of January — when the calls from employees were still barely a trickle — Bob declared victory, reminding his team that he had promised the new employee portal initiative would just about eliminate the annual barrage of calls. The payroll veterans were skeptical that a computer program would stop employee calls, but now they had to acknowledge maybe the plan had indeed come together.

The Portal Initiative, as it became known in the company, was launched last fall when the company's ERP consultant suggested adding a "portal" for employees using the Microsoft SharePoint Business Portal tool that was part of their ERP system. There would be some consulting services required to set it up, but the exciting news was they already owned the Windows SharePoint Services (WSS, soon to be renamed Microsoft SharePoint Foundation 2010) software. It was included in their Microsoft Windows Server (Windows 2003 and later versions).

How was this a company win? There was no need to hire another staffer to handle the growing requests. With Business Portal and SharePoint, employees could access their paychecks, deductions and benefits information and request changes by

logging into the portal system from work or home, whenever they wanted. It was

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a starting checklist:

- Determine your business needs so you can design a Project Plan. In Bob's case, it was focused on eliminating or dramatically reducing employee calls for payroll information.
- Appoint a design and implementation team.
- Set a realistic timeline, taking into account planning and implementation meetings, installation, configuration, any data migration, training and ongoing administration.
- Involve the users as early as possible to gain early acceptance.
- Plan and schedule proper training.
- Schedule periodic assessments to ensure you are addressing business needs appropriately.

With the broad variety of tools that are part of SharePoint, starting with the Collaboration basics helps build a foundation and knowledge. Here are pieces of information to start gathering and reviewing:

- **Who has access and to what content?**
 - Everyone? Yes, for accessing such items as policies, procedures or product information.
 - Just selected individuals? Yes, for giving access to management or project status reports.
 - Others? Yes, if they are part of management or groups who might need access for more effective collaboration on projects, documents and meetings.
- What type of content requests are people asking for: Excel, calendars, reports, PowerPoints?
- How long do you need to keep historical data?
- How static is the content? Does it change weekly, monthly or yearly?

- How many people contribute and/or are responsible for the content you want

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- Do you have a team member who can serve as security administrator?
- Who should be on your design and implementation team? Be sure you have representation for each functional area you are addressing.

Involving users early is a best practice for a successful SharePoint implementation because as broad as it is, you'll need that user input for prioritizing.

All the planning will ensure success, just as it did for Bob.

While Bob still scoffs at the idea of taking time off during a week with payroll, he admits his stress level continues to drop as more employees get comfortable with the self-service features now available through the company's SharePoint Portal. Requests reduced more after his team started including stuffers with payroll stubs reminding employees they can access the Payroll Document Library for most of the company's policy documents and employment forms, from benefits signups to tax withholding forms, emergency contacts and change of beneficiary forms.

The other big win with SharePoint was giving managers self-service access to specific reports with appropriate security. That means the managers are no longer reliant on the availability of Bob's team when they need a report or other information. Bob even used some savings from not having to mail out reports, to help fund a year-end payroll department dinner. Executive management is now looking to SharePoint to help in other ways by starting with an additional list of needs.

It's just another way to spread the benefits of sharing. And after all, wasn't it Mom that always said sharing was a good thing? Microsoft must have overheard that when it designed SharePoint. Big surprise, she was right!

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