How/why we use Sharepoint

When SBS first arrived on the scene, we, like most other technology businesses didn't pay any attention to Sharepoint. Ironically enough we were at that stage searching for a suitable CRM system to implement inside our business. After doing some research we decided that we needed to investigate this Sharepoint stuff and really from there haven't looked back.

Initially, we used Sharepoint version 2 that comes native with SBS but the more we heard about Sharepoint version 3 the more we knew that this was the product for us. So why Sharepoint? First and foremost it is probably the most flexible yet easy to use software tool out there at the moment. Even better, Windows Sharepoint Services is a free download from Microsoft and can be installed on any Windows 2003 Server. This is very appealing because it means there is no battle with customers as to the upfront software and licensing costs and secondly the product can be installed on just about any modern Windows server.

What I'll focus on here is how we have taken the Sharepoint product and tailored it to suit our needs internally. Now, it is possible to install Sharepoint V3 on an SBS 2003 machine but for our internal use we decided to install it on a separate Windows member Server. To allow even greater flexibility we also opted to install it in a Virtual PC environment. Why? Using Virtual PC we are able to run a number of machines on a single piece of hardware. It is also easy to "freeze" a virtual PC in a running state if needed, as well provide simple migration to new and improved hardware. Clearly, virtualization provides enormous benefits and we took this opportunity to dabble with this in a production environment but that is another story. Some of the other advantages of running Sharepoint V3 on a stand alone server is that it provides better redundancy and allows the use of the email in and out features that are not available if Sharepoint is installed on a server running Exchange.

With all that decided we ran up a dedicated, clean Sharepoint V3 server and attached it to our network. Much like Excel, when you first work with Sharepoint you are presented with a blank canvas, you need to build in the intelligence yourself. So the obvious first task was to create a list of all our customer details. We started with the default options provided by Sharepoint but quickly extended the list to include things like: what network configuration they had, what broadband provider they used, what their service level was and so on.

Customers: Crane

Close

New Item | Edit Item | Delete Item | Manage Permissions | Alert Me | Export Contact

Company	Saturn Alliance
Last Name	Crane
First Name	Robert
Full Name	Robert Crane
E-mail Address	robert@saturnalliance.com.au
Job Title	Director
Business Phone	02 9882 5020
Home Phone	
Mobile Phone	0409 010 950
Fax Number	02 9882 5055
Address	Suite 4 Level 2 Focus Business Park 64 Talavera Road
City	North Ryde
State/Province	NSW
ZIP/Postal Code	2113
Country/Region	Australia
Web Page	Saturn Alliance Home Page
Notes	
Service Level	Extended Monitoring
Hosting	Get Started
Network	SBS 2003 Premium R2
ADSL Provider	Exetel
Active	Yes

Created at 12/01/2007 3:54 PM by Robert Crane
Last modified at 29/10/2007 11:10 AM by Robert Crane

Close

Now using the ability to create different views of the same data in Sharepoint we are able to examine our customer information in a variety of forms very quickly. If we just need a phone number we can view a summary, if we want to create a mail merge list, we simply pick that view and export it to Excel, then do the mail merge. The flexibility to slice, dice and filter your data using views is a very powerful feature of Sharepoint.

Now with our customer list created we wanted a way to track all our jobs. Like most service businesses we make the bulk of our revenue by providing our skills to clients. If we don't record our work somewhere, typically it doesn't get billed, which means we lose out on revenue. The area where this failed to happen most often was phone support. Typically, a customer rings up, you solve their problem but fail to record the details and then fail to bill them for the time. Using a Sharepoint list we can now capture all that information. So we created a new list that included a lookup field to the previous customer list we had created along with other data we needed captured like time worked on job, date, who the work is assigned to and so on. We also added a comment field for general text. So when an issue is created all the details are entered and the comment field is completed. Unless the job is finished it remains as Active and using views again in Sharepoint, we can easily see what work is current.

Phone Support

	New ▾	Actions ▾	Settings ▾					View: **Not Billed (demo)** ▾

📎	Issue ID	Title	○ Assigned To	Category	Total Time	Modified	Issue Status
⊟ Start Time : 25/10/2007 (1)							
	297	Reset screen orientation	Robert Crane	Workstation	12.17	25/10/2007 5:12 PM	Closed
⊟ Start Time : 24/10/2007 (4)							
	292	Check workstation software	Robert Crane	Workstation	0.50	24/10/2007 8:38 AM	Closed
	294	Restart Backup Exec service	Robert Crane	Server	0.17	24/10/2007 8:48 AM	Closed
	295	Emails prompting for password	Robert Crane	Workstation	0.17	24/10/2007 12:04 PM	Closed
	296	Shadowprotect failed	Robert Crane	Server	0.00	29/10/2007 10:14 AM	Closed
⊟ Start Time : 23/10/2007 (5)							
	289	Allocate Static IP address	Robert Crane	Server	0.25	23/10/2007 10:47 AM	Closed
	290	Unable to create calendar items	Robert Crane	Server	0.50	23/10/2007 12:30 PM	Closed
	293	Update workstation	Robert Crane	Workstation	0.50	24/10/2007 8:39 AM	Closed
	288	Backup failed	Robert Crane	Server	0.00	24/10/2007 10:20 AM	Closed
	291	No send button in office	Robert Crane	Workstation	2.00	24/10/2007 12:10 PM	Closed
⊟ Start Time : 19/10/2007 (1)							
	287	Restart firewall	Robert Crane	Server	0.25	19/10/2007 6:15 PM	Closed
⊟ Start Time : 18/10/2007 (2)							
	285	Delete virus files from PC	Robert Crane	Workstation	0.25	18/10/2007 11:10 AM	Closed
	286	Troubleshoot Internet access issues	Robert Crane	Server	0.50	19/10/2007 6:24 PM	Closed
⊟ Start Time : 17/10/2007 (3)							
	282	Reset user password	Robert Crane	Server	0.25	17/10/2007 6:06 PM	Closed
	283	Unable to login to PC	Robert Crane	Workstation	0.08	18/10/2007 10:58 AM	Closed
	284	Server won't boot	Robert Crane	Server	0.25	18/10/2007 10:58 AM	Closed
⊟ Start Time : 16/10/2007 (5)							
	279	No login to PC	Robert Crane	Workstation	0.50	16/10/2007 4:53 PM	Closed
	280	Reset user password	Robert Crane	Server	0.25	16/10/2007 4:54 PM	Closed
	281	Restore data on EISERVER	Robert Crane	Server	0.75	16/10/2007 4:55 PM	Closed

Now each time the job is updated and additional comments are added they are automatically time stamped by Sharepoint so we have a full history of the work carried out. I can't begin to tell you how handy this is in tracking work that can take weeks to complete. A good example is when we send equipment back for warranty repair. We again enter all the details into Sharepoint and are able to keep track of exactly what is happening at any point in time. Even better we have a full history and thus, if we need to reactivate the job, we simply change the status from Closed to Active.

Now this is all well and good and helps us track the information (which saves us money) but how does it make us money? At the end of each month we have a developed another view in Sharepoint that shows all the jobs that haven't been billed, which we have sorted by customer. It is now a simple matter of summarizing all the information into a single invoice which we send the customer to cover the work that typically before went unbilled. If the customer has a query about any work performed during the month we simply call up Sharepoint and provide them with the detail. Quick and easy, more revenue less hassle.

Now probably the other critical use of Sharepoint for us internally is the implementation of three Knowledge Bases. The first is a general technology knowledge base, the second one a customer specific knowledge base and the third is a business knowledge base. Into the general knowledge base we pour all the technical information we locate, things like build numbers, configuring software, how to's and so. All our knowledge bases are created using Sharepoint Wikis which means they support rich text and hyperlinks. How many times have you found a web site that solves a problem but then been unable to locate where you saved it? No more with Sharepoint. Now the Customer Knowledge base contains specific information relative to clients,

Saturn Alliance > General Knowledge Base

General Knowledge Base

Type	Name	Modified By	Modified	Created By	Created
	Exchange 2003 tar pitting	Robert Crane	18/01/2007 11:36 AM	Robert Crane	18/01/2007 11:36 AM
	Exchange IMF Updates	Robert Crane	29/03/2007 10:49 AM	Robert Crane	29/03/2007 10:45 AM
	Exchange keeps resetting default Outlook email account	Robert Crane	18/01/2007 11:36 AM	Robert Crane	18/01/2007 11:36 AM
	Exchange message size restrictions	Robert Crane	18/01/2007 11:37 AM	Robert Crane	18/01/2007 11:37 AM
	Exchange MTAcheck	Robert Crane	18/01/2007 11:40 AM	Robert Crane	18/01/2007 11:40 AM
	Exchange performance tuning	Robert Crane	18/01/2007 11:41 AM	Robert Crane	18/01/2007 11:41 AM
	Exchange server ISINTEG	Robert Crane	18/01/2007 11:42 AM	Robert Crane	18/01/2007 11:42 AM
	Excluding systems from RWW list	Robert Crane	18/01/2007 11:42 AM	Robert Crane	18/01/2007 11:42 AM
	Exmerge and Outlook 2003 PSTs	Robert Crane	18/01/2007 11:43 AM	Robert Crane	18/01/2007 11:43 AM
	Extending Sharepoint search to Acrobat PDF documents	Robert Crane	23/05/2007 2:51 PM	Robert Crane	23/05/2007 2:45 PM
	External time sync batch file	Robert Crane	18/01/2007 11:44 AM	Robert Crane	18/01/2007 11:44 AM
	Filtering connections with SBS 2003 Std	Robert Crane	12/03/2007 11:22 AM	Robert Crane	12/03/2007 11:22 AM
	Forcing WSUS update	Robert Crane	18/01/2007 11:44 AM	Robert Crane	18/01/2007 11:44 AM
	FSMO Roles	Robert Crane	18/01/2007 11:45 AM	Robert Crane	18/01/2007 11:45 AM
	Getting Firefox working with SBS	Robert Crane	18/01/2007 11:46 AM	Robert Crane	18/01/2007 11:46 AM
	Granting administrator rights to all mailboxes	Robert Crane	18/01/2007 11:47 AM	Robert Crane	18/01/2007 11:47 AM
	How to Automatically Import Public Folder Data in to CompanyWeb	Robert Crane	17/05/2007 12:20 PM	Robert Crane	17/05/2007 12:20 PM
	How to back up and restore companyweb data in Windows Small Business Server 2003	Robert Crane	18/01/2007 9:48 AM	Robert Crane	18/01/2007 9:48 AM
	How to block IM clients on my network with ISA Server 2004	Robert Crane	18/01/2007 11:49 AM	Robert Crane	18/01/2007 11:49 AM
	How to create a Windows NT 4.0, 2000 or XP boot floppy disk	Robert Crane	18/01/2007 11:49 AM	Robert Crane	18/01/2007 11:49 AM
	How to get rid of the new tag in Sharepoint	Robert Crane	18/01/2007 11:50 AM	Robert Crane	18/01/2007 11:50 AM
	How to Install a Public 3rd Party SSL Certificate on IIS on SBS 2003	Robert Crane	22/08/2007 3:34 PM	Robert Crane	22/08/2007 3:33 PM
	How to move databases between computers that are running SQL Server	Robert Crane	18/01/2007 11:51 AM	Robert Crane	18/01/2007 11:51 AM
	How to prevent internal users sending external emails in Exchange	Robert Crane	18/01/2007 11:56 AM	Robert Crane	18/01/2007 11:56 AM
	How to recreate Exchange STM file	Robert Crane	18/01/2007 11:57 AM	Robert Crane	18/01/2007 11:57 AM
	How to remove OEM logon wallpaper	Robert Crane	18/01/2007 11:58 AM	Robert Crane	18/01/2007 11:58 AM
	How To Reset the Directory Services Restore Mode Administrator Account Password in Windows Server 2003	Robert Crane	27/03/2007 12:45 PM	Robert Crane	27/03/2007 12:45 PM
	How to reset the Trend security dashboard password	Robert Crane	29/06/2007 9:24 AM	Robert Crane	29/06/2007 9:24 AM
	How to set Exchange bad mail directory	Robert Crane	18/01/2007 11:58 AM	Robert Crane	18/01/2007 11:58 AM
	How to set size limits for messages in Exchange Server 2000 and 2003	Robert Crane	18/01/2007 12:07 PM	Robert Crane	18/01/2007 12:07 PM

for example unique applications they have installed, how "custom" things are done with the client and so on. That way, the information is documented and saved for all staff but yet not mixed up with the general technical information. Why is this? Let's suppose that one day we wanted to sell our technical knowledge base or provide it for a fee to other consultants, we can do that because all the client specific information is held in a separate area. The final knowledge base details information about our business. Think of all that business information that is sloshing around inside your head that never gets documented? As the E-Myth says, you need to record all your procedures and processes and Sharepoint makes it simple. For example our Business Knowledge base contains things like how to order from different suppliers, how to make banking transfers, and even where the post office box is located. It may seem trivial but if you ever want to get away from doing the mundane business work you need to document it so you can hand it off. With Sharepoint Wikis we can do this in a rich editable environment.

Some of the other things that we use Sharepoint for include: tracking customer hardware and software purchases, price lists of consumable products for printers, tape drives etc, tracking and following up on quotes, etc. We are finding more and more uses of the technology everyday but do you want to know the REAL power of Sharepoint? As you appreciate, having all the information in the world is useless unless you can find what you are looking for quickly. Everything I have talked about and have put into Sharepoint is TOTALLY searchable. Want to find something about a customer? Do a Sharepoint search. Want to find a solution to a technical problem? Do a Sharepoint search? Need to know how to find the PO Box? Do a Sharepoint search. So, Sharepoint is not only a way to save your business information it is also a way to locate your business information. Maybe if Sharepoint was sold along these lines rather than using the standard "collaboration" style catch

phrases there'd be more people using it! There is just so much to this product and only so much space we can take so let us know if you want to hear more about what is possible.

In conclusion, all I can say is that our business would now be lost without Sharepoint. The great thing is that we know there is so much more that we can do (eg Workflows, custom web parts, etc). My advice is that you should be seriously looking a Sharepoint not only for your customers but also to improve your own businesses intelligence. The value of most businesses like ours is the information it accumulates overtime and Sharepoint makes it so easy to capture all this in a single place. I have little doubt that the value of our business has increased because we now retain information that before was never recorded. In my opinion you can't sell Sharepoint unless you actually use it, so get to it! If not for your clients then for your own business.