Case Study 3: Navigation, Design & Layout

Kartik Velede

8672807

Collaborative Productivity– INFO8870

Douglas Hardie

January-22-2019

January-28-2019

**Table of Contents**

[**1.** **Scenario** 2](#_Toc31142078)

[**2.** **Tools to Address Business Requirement** 2](#_Toc31142079)

[**2.1 Pages:** 2](#_Toc31142080)

[**2.1.1 Web Parts and Add-ins:** 2](#_Toc31142081)

[**2.2 Libraries:** 2](#_Toc31142082)

[**2.3 Lists:** 2](#_Toc31142083)

[**2.4 Navigation :** 2](#_Toc31142084)

[**2.5 Security and Permissions :** 2](#_Toc31142085)

[**3.** **Why Did you choose these Tools?** 2](#_Toc31142086)

[**4.** **How will this Tool help the organization get the “Look and Feel” they want?** 2](#_Toc31142087)

[**5. References** 2](#_Toc31142088)

# **Scenario**

The business owner comes to you asking for a re-vamp after a few months of the SharePoint site being active for the Accounting department. Due to organisational changes and testing from the site, she feels that more can be done to improve the site's flow, make it more user-friendly and cover what the team needs.

# **Tools to Address Business Requirement**

Different types of tools are available in SharePoint to present and organize information and to meet the business requirement.

The following are the types of tools used to develop the site.

## **2.1 Pages:**

SharePoint Pages are one of the types of the tool used to store the information within the site. When you create a site in SharePoint by default it contains a home page. You can edit the page by adding webparts and add-ins to make sure you get to see the all the important features at one place which makes accounting department more user friendly.

### **2.1.1 Web Parts and Add-ins:**

The content you wanted on the SharePoint site can be added through web parts and add-ins and these can be added, deleted and arranged the way you wanted them to look.

All the lists, libraries and apps are added to the main page by using web -parts and add-ins

## **2.2 Libraries:**

An accounting department consist of various documents related to process such as follow

* Journal
* Ledger
* Trail balance
* Balance sheets

In order to keep all these documents at one place you need library which stores and manages the information.

## **2.3 Lists:**

An accounting department consists of various numbers of transactions which needs to be stored, tracked and summarized. These things can be made possible with various number of lists that are available as follows.

**Tasks**: Tasks helps in managing transactions that are performed and to keep track of them**.**

**Custom List**: This list will be helpful in storing the inventory stock by labeling it

**2.4 Navigation :**

Site navigation consist of list of navigation links in pages, sites and site collection to help the user in reaching the relevant location. This tool helps the employee in the account department to locate to place where he wants to get the information and work on it quickly and easily

## **2.5 Security and Permissions :**

This tool helps the site owner to assign rights to the users within their own sites. Based on the role or position of an employee in a company permission are assigned accordingly. By doing this the confidential documents present in account team can be protected and changes can’t be made until and unless the employee has access to it.

# **Why Did you choose these Tools?**

By researching all the tools that are present in the SharePoint ,the above selected tools will best suite the account department by providing the user-friendly environment for the employees in the organization , meeting the requirement needs and getting rid of dissatisfaction from the business owner about the previous SharePoint site.

# **How will this Tool help the organization get the “Look and Feel” they want?**

The following are the ways that will help and impact business values of the organization by using the above-mentioned tools

**Pages**: By using this tool for the site will give the user a clear path to take which will improve user experience and increase productivity.

**Navigation**: While developing a site, navigation plays an important role, it's essentially the map that displays the relevant places user can visit.

**Security**: This tool helps in handling sensitive and confidential data and provide information to manager about who accessed , updated and deleted it.

**Library**: This tool improving the scalability by supporting document storage which is most important for the company.

# **5. References**

1. Mikeplum (8/1/2017) Overview of site navigation in SharePoint Server . Retrieved from **:**

[**https://docs.microsoft.com/en-us/sharepoint/sites/site-navigation-overview**](https://docs.microsoft.com/en-us/sharepoint/sites/site-navigation-overview)**.**

1. Smith, Tony, SharePoint 2016 User’s Guide: Learning Microsoft’s Business Collaboration Platform, Fifth Edition, 2016, Apress.