sdg Technology Delivered

sdg consultants were leveraged to develop and implement a content migration process and document management solution that could be maintained, scaled and replicated by the client.

CONTENT MANAGEMENT SOLUTION FOR FINANCIAL INDUSTRY

Challenge

Known for their ability to serve as an indispensable partner for growth, our client provides small businesses and financial institutions the services they need to expand and succeed. They are also a leading producer of checks throughout North America.

Within our client's training department, there was no central repository for training services content. Training documents and materials were stored across several file servers, individual PC's, email boxes, Lotus Notes databases, and their learning management system.

In addition, their documents were named and organized differently based on the user or group developing the training. This content confusion led to duplication of documents, making it difficult to locate the most current version of each file.

Technologies used:

+ Microsoft Excel
+ Microsoft SharePoint 2007

Solution

The client chose to use their existing SharePoint environment as the platform for the new content management system. sdg consultants and a dedicated project team worked together to identify our client's usable content for mass migration into SharePoint.

The content was grouped into categories and a set of metadata was defined to develop a master spreadsheet listing the files and locations of the training documents. The spreadsheet allows subject matter experts to apply the metadata quickly and the project team to migrate the content without difficulty. The SharePoint Training CMS focuses on simple navigation that allows content to be accessed within 3 to 4 clicks from the training home page. Findability was increased by using a scoped search in each page to target content at that level, then returning the results to the current page. This navigation and organization was made possible by using SharePoint content types, site columns, and views to automatically organize the content base on metadata.

The CMS gives our client one source for all of their documents, allowing multiple users to access and share data. It automatically updates and saves content, avoiding duplication and multiple versions of the same document. sdg consultants also created a how-to wiki and a maintenance wiki for our client to demonstrate how to use, manage and expand the new CMS.

With the CMS solution provided by sdg, our client is able to continue migration and organization of data on their own in the future.