

Lab A:
Creating a SharePoint ECM Solution

Hands-on Lab

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In this lab, you design a set of sites for the finance department at Contoso. The Finance department is responsible for day-to-day accounting needs of the organization and larger financial matters such as the evaluation of targets for mergers or acquisition. In this exercise, you provide a rough design based on the provided requirements.

# Task 1: Merger and Acquisition Site

In this task, you design a plan for a merger and acquisition site. This site will be used by finance employees to learn about how Contoso conducts its analysis of a target company for acquisition or merger. This site is the knowledge repository for how work should be done when analyzing targets.

For this site, there are a few different audiences. The first audience is the audience of the company at large. That is, every employee is allowed to see a set of basic documentation about the process. However, because of the potential influence on the process, no one outside the organization can access the information—even if it’s downloaded and forwarded to them.

The second audience is the audience of financial analysts, attorneys, and other staff who actively work on the acquisition of other organizations. This audience has access to more detailed information that has the same requirement that it not be distributed. The additional content they might have access to includes template scorecards for indicating the perceived value of the target organization.

The third audience is executive management who are able to see a status of the pending acquisitions.

The content in the site is a collection of Word documents for the policies and procedures, Excel spreadsheets for the scorecards and various tracking information, Microsoft Project files for templates of the acquisition evaluation process, and PDF files for industry reports and industry guides.

The organization expects that the mergers and acquisitions department will remain for the foreseeable future. They recognize that some of the work that they do will require that they keep records of their policies at the time of an acquisition evaluation.

Given the previous information, discuss a structure that is appropriate for this site including answers to the following questions:

* Which SharePoint ECM features do you believe are critical to the success of this site?
* What type of security considerations should be applied to the site?
* What kinds of libraries, content types, and other data storage structures do you need?
* What kinds of data validation or workflows are necessary for this site?

# Task 2: Merger and Acquisition Target Company Site

In this task, you design a plan for a site to house the information gathered during an assessment of a target organization. This site will be the working space for the team to use to capture the results of the analysis and to coordinate their activities. The site will store documentation about that acquisition target that might be voluminous based on the size of the target. Organization of the information is important to ensure that all of the appropriate information can be found.

There are two audiences for this site. The primary audience is the team assigned to the acquisition assessment. The team needs to track documents including working summaries of the acquisition viability as well as the tasks that must be completed in order to complete the assessment work.

The second audience is executive management, which needs the ability to review information and assign new tasks to the team. The executive management needs a view that enables individuals to quickly find the information among the thousands of documents that will be a part of the system.

Given the previous information, discuss a structure that might be appropriate for this site including answers to the following questions:

* Which SharePoint ECM features do you believe are critical to the success of this site?
* What type of security considerations should be applied to the site?
* What kinds of libraries, content types, and other data storage structures do you need?
* What kinds of data validation or workflows are necessary for this site?

# Task 3: Accounts Payable Invoice Management

In this task, you design a plan for a site to house the accounts payable invoice approval process. SharePoint will become the mechanism that Accounts Payable uses to match purchase orders (POs) and receive approval to pay invoices. The organization processes about 10,000 invoices from vendors per month. It receives them in paper, FAX, and email format. The invoices are matched against an existing PO, and the owner of the purchase order is assigned the approval of the invoice for payment.

In cases where the PO cannot be identified, the vendor needs to be notified that a PO is required and it must resubmit the invoice.

The invoices must be kept for three years once approved. Rejected invoices can be discarded immediately.

There are two audiences for this solution. The first audience is the accounts payable department, which manages the routing of invoices for payments. It wants to leverage the financial system’s active POs list to associate invoices to. This includes the capability to access the email address of the person who requested the PO to begin the approval process.

The second audience is all of the employees in the organization who are allowed to approve invoices for payment, which is practically anyone in the organization. The employees are expected to review the invoice and confirm that the goods or services were provided. After they agree that the invoice is valid, they approve the invoice and it’s paid based on the standard terms for the vendor.

Given the previous information, discuss a structure that might be appropriate for this site including answers to the following questions:

* Which SharePoint ECM features do you believe are critical to the success of this site?
* What type of security considerations should be applied to the site?
* What kinds of libraries, content types, and other data storage structures do you need?
* What kinds of data validation or workflows are necessary for this?