



## *Case Study: Microsoft SharePoint 2007 Implementation for Contract Management*

### **Excellere improves Contract Processing Time for OneLink Communications**

#### **The Customer**

OneLink Communications ([www.onelinkpr.com](http://www.onelinkpr.com)) is a telecommunications company in Puerto Rico that provides internet and television services.

#### **The Challenge**

OneLink Communications wanted a Contract Management system to improve the inefficient and time consuming manual processing of contracts. One of the principal tasks of OneLink's staff is to manage large amounts of service contracts in a timely fashion in order to provide customers with a quality service. Excellere was contracted to implement a contract management solution that would streamline processing and reduce the time needed to process the contracts. There was no previous system to process contracts. All the tasks were performed manually.

Having to manually process the contracts presented the following challenges to OneLink:

- Contracts processing could take days.
- Information was spread or isolated through all the company (it was not centrally contained).
- There was no efficient way to keep metrics of the contracts processing (how much contracts processed in a time slot, contracts processed by employee, etc.)

#### **The Solution**

To address the challenges faced by OneLink Communications, Excellere implemented a Microsoft SharePoint 2007 Contract Management solution.

The solution was architected with the following components:

- Microsoft SharePoint 2007
- Visual Studio 2008
- Visual Basic .Net
- HTML
- CSS
- JavaScript
- SharePoint Designer
- MS SQL Server 2005

In this project, Excellere executed a full development cycle, providing services throughout all its phases:

- Analysis & Design
- Programming
- User Acceptance Test Support
- Training
- Documentation
- Implementation Support
- Project Management
- Weekly PMOs
- Capacity Planning for current and future workloads (up to three years)

The implementation of this architecture provided the following capabilities:

- An intranet portal that includes a contract management solution with search and a business intelligence sites that is accessible through a Web Browser in a centralized architecture.
- A workflow to manage the routing of contracts to the different groups for approval.

- Some SharePoint Designer custom workflows were designed to manage notifications for overdue tasks.
- End Users could easily track the current state of a contract in the process.
- Configuration of SharePoint Single Sign On was provided to achieve seamless integration to external connections from Analysis Services Cubes to SharePoint Web Parts (KPI's Web Part, Excel Services web part, Task List web part, etc.)
- Process changes were easily adjusted through a Visual Interface and did not require a programmer in order to adjust the process.
- Application maintenance was done centrally, providing enhancements to all the company users at once.
- Customization of master pages was provided to achieve the company requirement for the portal's look and feel.
- Excel web parts were applied to display data from the data warehouse metrics and business intelligence data.

This solution enabled OneLink Communications to create an efficient, cost-effective contract management system that automates processes,

helping to transform how they provide services to their customers.

### The Results

Excellere's Microsoft SharePoint 2007 Contract Management solution improved efficiency, by allowing OneLink Communications to adjust their current processes without the burden and risks associated with custom programming. Efficiency was also achieved in the processing of contracts, reducing the time to process significantly. Reports provided managers with the information they need to increase or decrease the workforce needed to process their work load in a timely manner. Custom reports provided managers with metrics about their employees' efficiency in completing their work tasks.

Access to processes and functionalities were tightly integrated with OneLink's current Active Directory security configuration, minimizing the administrations tasks for security management purposes and eliminating the security risks since using the Active Directory users with security policies avoids the uses of the system from unauthorized users.

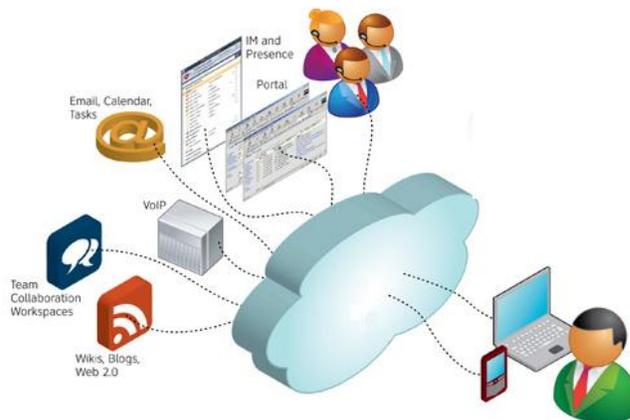


Figure 1 View of the SharePoint 2007 Architecture implementation for contracts processing