



Project Facts

Country/Region:

North America (USA, Canada)

Customer Profile:

Online Business Systems (Online) is a business and technology consulting firm that, since 1986, has been increasing productivity and innovation for their clients through planning, transforming, and managing their clients' IT environments. Online achieves this through their people who not only have their finger on the pulse of technology, but also have an astute understanding of how business works. It is the combination of their people, their methodologies, and their culture that enables them to deliver results – without compromise – to clients across the Public and Private sectors. As a result they are trusted advisors, guiding clients in the Health, Agribusiness, Financial Services, Energy, and Justice & Public Safety industries.

Project Issue:

Content migration to Microsoft SharePoint 2010 requires categorization / tagging to benefit from the new KM and social networking features as soon as possible.

Solution:

Layer2 Knowledge Management Suite closes the gaps with KM in Microsoft SharePoint 2010.

Layer2 Knowledge Management Suite Used By Online Business Systems To Fully Leverage New SharePoint 2010 Features

“To fully leverage the new search features in Microsoft SharePoint 2010 it is imperative that the content be tagged appropriately. The Layer2 Knowledge Management Suite (KMS) provides us with an advantage by doing the tagging automatically. The KMS gets us started, so that we can take advantage of the new SharePoint 2010 search features as soon as possible.”

Susan Neilan, Director of Professional Management at Online

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Project issues to solve with SharePoint Migration

Online starting using SharePoint 2003 for the storage of their internal content. When they upgraded to 2007, they did an upgrade in place. That process involved some issues which left Online with some

Customer Benefit:

- Increased user productivity and precision while bulk-tagging SharePoint items and documents using the KMS Auto Tagger.
- Discover content based category suggestions using the KMS Tag Suggester.
- Corporate knowledge navigation using the KMS Tag Navigation Web Part.
- Common corporate language using the KMS Tag Directory Web Part as automatic glossary.

Hardware / Software:

- Microsoft Windows Server
- Microsoft SharePoint Server 2010
- Microsoft SQL Server
- Layer2 Knowledge Management Suite for SharePoint 2010

More information about Microsoft SharePoint 2010:

<http://sharepoint.microsoft.com>

More information about Layer 2 GmbH:

<http://www.layer2.de/en>

More information about Online Business Systems:

<http://www.obsglobal.com>

inconsistencies in their environment. When they decided to upgrade to 2010, they opted to do a fresh environment install of SharePoint 2010 and then migrate all of their data over. This gave Online the opportunity to invest in changes to their taxonomy to better enable the organization of their content and search functionality, as well as to better position themselves for the new features in 2010.

Online's SharePoint portal is their main document repository for content such as intellectual property, sales and marketing collateral, and human resource related content. It is also their collaboration platform for functions such as responding to client requests and bids for services, and developing client deliverables based on examples of work that they have done in the past. The need to find content quickly is imperative. While getting their content into SharePoint 2010 was key, search had been identified as one of the areas they most needed to improve on. The driving factor for making the move to SharePoint 2010 was the improved search features it would provide and Online needed to be positioned to take advantage of these features as soon as possible.

Online recognized that having the content on SharePoint tagged would be vital in order to achieve the goals of better search. While perhaps their people would be able to tag new documents going forward, Online understood that they would not have the time necessary to tag all the existing content being migrated to SharePoint 2010.

Project facts

Online employs just over 275 individuals, with the majority dispersed across six North American offices and a handful working remotely

across the United States well outside of these geographies. Online's offices also span four time zones, which can make it difficult to follow up with people to get questions answered. With over 240,000 indexed items on SharePoint (and growing every day), Online's content is separated into four portals – their main portal, an archive portal for historical content, the teams' portal for private collaboration sites, and the MySite portal. For all of these reasons, it was obvious that Online needed to improve their search functionality in SharePoint.

Benefits of using SharePoint 2010 out-of-the-box

Online had been using SharePoint for about eight years and found it satisfied their goals of providing a collaboration platform and a centralized location for storage of all types of content.

When SharePoint 2010 was released, Online recognized it had several features that warranted the upgrade:

- Enhanced search features including refinement panels.
- Managed metadata assigning of terms to documents to enable search and auto-tagging features.
- Social tagging features such as "I Like It" and "Tags & Notes."
- An enhanced MySite experience.

Benefits of adding the Layer2 Knowledge Management Suite to SharePoint 2010

In migrating their content – over 240,000 documents, spreadsheets, etc. – from 2007 to 2010, Online made sure to use a tool that would preserve modified dates, author information and other meta data so that they could take advantage of the search refinement panels.

Online created a term store containing over 1,500 items as a starting point for their tagging and then installed the Layer2 Knowledge Management Suite for SharePoint (KMS) to take care of auto tagging.

Online has implemented the following features of the KMS suite: Auto Tagger, Tag Suggester, Tag Navigation Web Part and the Tag Directory Web Part.

The **Auto Tagger** means that much of their content is being automatically tagged, so when searching, their people can refine the search based on the tags. This helps to reduce the volume of the result set and allow users to find what they are looking for faster.

The **Tag Suggester** helps individuals when they manually tag new documents they are uploading.

Online has used the **Tag Navigation Web Part** and the **Tag Directory Web Part** as search-driven applications to provide a hierarchical and alphabetical view of the tags that are available for use and the tags that are in use. Basically, these provide a shortcut to search results.

The Layer2 KM SharePoint add-on gets you off to a fast start

To fully leverage the new search features in SharePoint 2010, it is imperative that the content be tagged appropriately. The best possible scenario would be to have the users and authors of the content apply the tags that make the most sense. However, we all know the reality is that people do not typically have the time to do this properly. The KMS provides an advantage by doing the tagging

automatically. As Online's users experience the benefits of appropriate tagging, the expectation is that they themselves will take on tagging the new content that they upload and the older content that they access. The KMS gets you started so that you can take advantage of the new SharePoint 2010 search features right away!

Possible next steps for future

Online's next area of focus will be in using the Layer2 **Taxonomy Manager** to make their auto tagging smarter, for example, using more complex content categorization rules. Online will also continue to refine their term store so that the **Auto Tagger** is able to more completely and accurately tag the content in their four SharePoint portals.

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About Online Business Systems

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About Layer2:

As a Microsoft Gold Certified Partner and ISV based in Hamburg (Germany), Layer2 is one of the leading providers of Microsoft SharePoint extensions in Europe with a major focus on Data Integration, Collaborative Knowledge Management and Social Networking. Layer2 has also been known as a reliable partner to customers in Central Europe, offering additional consulting and services in the fields of Microsoft SharePoint, Microsoft .NET programming and IT infrastructure for almost 20 years.