365 Solutions Group

Application Bundles

SharePoint DMS Kickstarter

One of SharePoint's key features is the Document Management System (DMS), a powerful information management tool once configured. This kickstarter bundle provides you with a functional DMS that fits most businesses at a fixed price, to streamline your organisation's documents in the cloud, and experience the benefits of accessing company documents securely, anytime, anywhere, from any internet-connected device. With this bundle we implement a simple DMS with automated processes such as applying for leave, and a great set of features, which can easily be expanded upon as required.

Benefits

- Get started with SharePoint
- Tried and trusted functionality
- Foundation to build on
- Up and running with SharePoint quickly and cost effectively
- Test out a complete SharePoint functionality before investing in customisations for your business
- Existing permission groups
- Manage Documents and Events across common business silos
- Completely scalable document management
- Leave request automation
- Expense claim automation
- 2 hours' admin training

365 Solutions Group have developed custom applications within SharePoint for years, and we have packaged up a few of the most commonly requested features into simple bundled applications, which can be added to your existing SharePoint system for a fraction of the cost of developing customized solutions from scratch.

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SP DMS Benefits

- **Co-Authoring** lets you work on a document in real time with other users
- Access your information **anywhere, anytime**
- Microsoft's 99.99% **uptime guarantee**
- Automatic **Version history** keeps track of all saved changes by all users, so you can always restore
- **Office Online** lets you access and edit all your files with the Office applications online even if they're not installed on that machine
- Tag files with **Metadata** (labels) to find documents more easily and quickly
- **Document previews** let you scroll through a file before opening it
- Use **Library Views** to restructure files instantly
- **Search file content** easily
- Control users' editing and viewing **Permissions**
- **'Follow'** documents
- **Share** documents
- **Sync** files locally
- and **more**…

Documents in SharePoint

Every business stores document somewhere, typically a file server or hard drives on their individual computers. Moving your files to a SharePoint DMS provides a host of benefits, as it is an extremely powerful business tool for organizing your documents and data, and finding the right information fast when you need it.

Below is a screenshot of the Intranet home page.
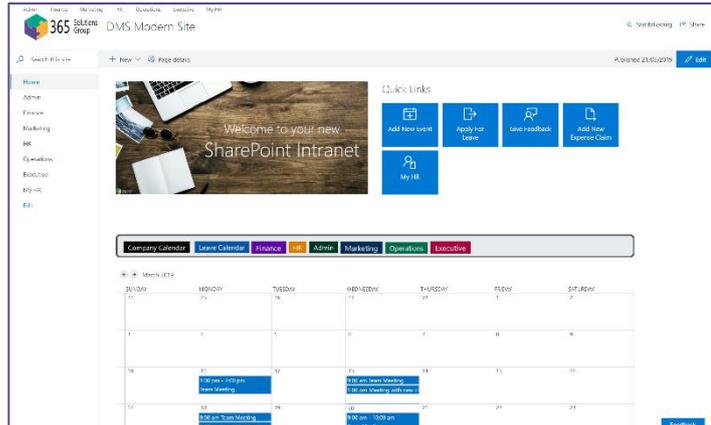
This package includes a standard SharePoint configuration and 7 standard sites with metadata and common uses.

- **Intranet Home**
  - Company shared calendar
  - Shortcuts to functionality
  - Relevant Policies display
  - "My HR" summary page (training, leave, links)
  - Feedback list for changes

- **Admin**
  - Admin shared calendar
  - Admin Documents library
  - Policies library
  - IT Documents
  - Instruction Manuals
  - Contracts and Agreements

  Asset Register package available separately

- **Finance**
  - Finance Shared Calendar
  - AP Documents
  - AR Document
  - Finance Documents
  - Expense claims list
  - Expense claims attachments library

- **Sales and marketing**
  - Marketing shared calendar
  - Client Documents
  - Products and Services
  - Marketing Collateral
  - Quotes and Proposals
  - Logos and Images
  - Blogs and Social Media

- **HR**
  - HR shared calendar
  - Leave Calendar
  - Generic Documents
  - General HR Documents
  - Employees List
  - Employee Documents
  - Performance Reviews
  - Awards and Remuneration

  Induction system package available separately

- **Operations**
  - Training and Reference
  - Operations shared calendar
  - Meetings calendar
  - Linked Meeting files
  - Internal Operations
  - Machinery and Equipment
  - Supplier and Materials

  Case Management package available separately

- **Executive**
  - Executive library
  - Legal Compliance
  - Generic Documents
  - Meeting Files
  - Executive shared calendar
  - Meeting calendar

What's it for you?

For End Users

A user-friendly intranet portal and document management system, that provides simple navigation to the information they need. Built with document libraries and calendars for each site, it provides a 'single source of truth' for company data, documents and events. We provide a user manual to help users get started, and to explain how it makes their jobs easier.

For Administrators

Our simple user manual guides you through each step of the implementation, from adding your employees to the staff list, approving leave and expenses, to adding new policies to the home page and maintaining the various lists and libraries. We also provide 2 hours of bespoke training for the admin team.

For Management

This bundle at a low fixed cost makes it an easy decision to implement and migrate your document management into a purpose-built environment. Control access to your company information, while making it easier for your staff to find what they need and to collaborate more effectively.

Metadata Capabilities

SharePoint provides a quick and easy way of 'tagging' documents so they can easily be found through a search. Documents can be hard to find in folders if they could logically be stored in several places, whereas searching for metadata tags will find them wherever they 'live' within SharePoint. These documents have columns of metadata.

Think of a quote for a customer – should you save it under "Quotes' or 'Customers'? If you store it in both, you may end up with multiple versions. But with metadata, tag it with the customer name and as a quote, and you can find the document no matter where it is stored.

Tagging documents, as opposed to storing them in folders, allows you to group documents together as expandable folders, by type, by company, by month or any other metadata applied to them.

Easy one-click between library Views shows the same files in different ways, decreasing the time it takes staff to find relevant files, and removing the confusion of where the latest version is stored.

Instead of searching through different company folders, a manager's personal notes or company project folders, tag the single file with all relevant metadata so it can be found by searching for any of the tags.

A simple and effective solution making it easy to access company files securely from the office or on the go. The rich features streamline processes and save time every day.

Pricing

This **complete bundle** is available for only AUD **$3,500** ex GST, including the intranet sites and automated workflows listed, with flexible project scheduling and implementation support. The **optional additions** as listed on the right can be included for an additional fee. Further changes and customization can be discussed and priced as required.

Manuals provided

SharePoint DMS end-user basics which includes the following modules:

- Different ways to upload documents individually or in bulk
- Preview, open, edit, save & delete files
- Adding and editing metadata
- Synchronize libraries for offline access
- Follow & Share files

SharePoint standard DMS admin user tasks including:

- How to recover deleted files for up to 30 days
- Restoring a file to a previous version
- Adding/changing meta-data columns and views
- Setting and changing user permissions
- Adding activity alerts to specific files or libraries

Enquire about further training manuals or add in some personal training sessions

Bundle Inclusions

This Kickstarter DMS bundle includes the following:

- Installation of our Kickstarter template
- Configuration of 7 commonly used SharePoint sites
- Up to 5 Libraries per site
- Over 100 custom metadata columns
- Custom navigation and buttons
- Landing pages with calendars & links
- User permission levels applied to up to 5 groups e.g. admin, user
- Applying company logo
- Apply company colour scheme
- Listed training manuals
- 2 hours of online training

Optional Additions

The following will incur additional costs if desired:

- New SharePoint tenant if not already using Office 365
- Additional SharePoint Sites
- Additional SharePoint Lists
- Additional Document library 'Views'
- Enabling, configuring and implementing content types
- New templated files at a click
- File approvals workflow
- In-person admin training
- End user training to improve adoption
- Custom branding

Questions?

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