



How to Build SharePoint Knowledge Portals that People Love to Use

November 17, 2015

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Earley Information Science

Jeff Fried
BAInsight

- **Welcome & Housekeeping**
 - Session duration & questions
 - Session recording & materials
 - Take the survey!
- **How to Build SharePoint Knowledge Portals that People Love to Use**
 - Paul Wlodarczyk, VP, Client Services, Earley Information Science (@twitcontentguy)
 - Jeff Fried, CTO, BAInsight (@jefffried)
- **Questions & Answers**
- **Join the conversation: #eiswebinar**

Today's Speakers



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Science

Leads enterprise digital transformation projects
30 years' experience in unstructured content
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Jeff Fried
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Long time Search nerd
Passionate about search, SharePoint, search-
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Earley Information Science helps organizations establish a strong information architecture and content management foundation

Realize your digital transformation vision with EIS.

Earley Information Science (EIS)

Information Architects for the Digital Age

Founded – 1994

Headquarters – Boston, MA

www.earley.com

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About BA Insight

- BA Insight provides software to accelerate implementation of SharePoint based intranets/portals and provide Internet-like user experiences, including search
- Hundreds of successful implementations at Global 5000 companies:





Case Study: Applied Materials Field Service Information Access

- Global leader in semiconductor manufacturing equipment needed better information access for Technicians who troubleshoot & repair products in customer's cleanrooms.
- Previously deployed multiple Knowledge Portals – which failed for one reason or another.
- Had information access challenges that could be true for any of us:

Challenge 1:

Hard to find answers in a sea of legacy content

Challenge 2:

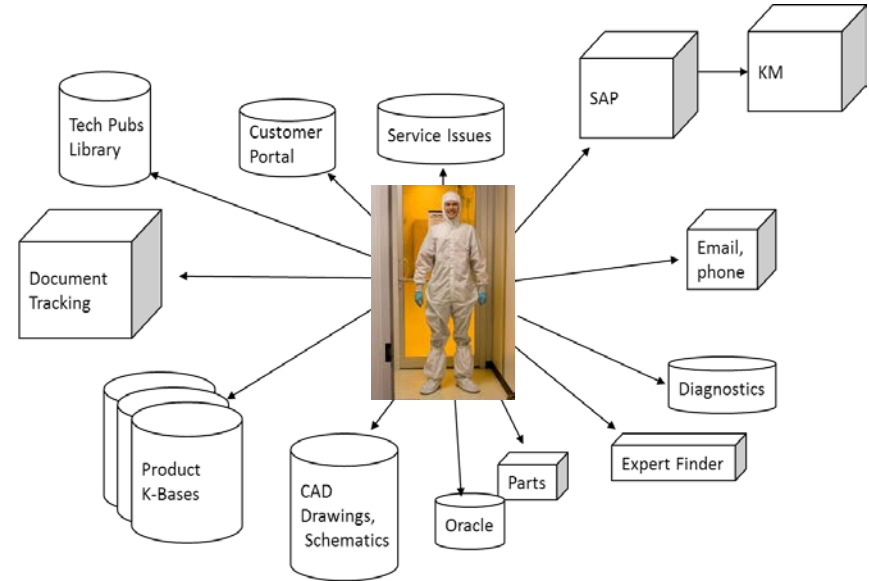
Complicated IP & security concerns

Challenge 3:

Numerous disconnected information sources

Challenge 1: Loads of content vs. answers

- **Decades of content:**
 - PDFs – manuals, drawings, scans
 - Communities – forums, shared drives, bulletin boards, email, chat
 - Knowledge Management – tips, Best Known Methods
- **Issues:**
 - Content located in 17 different systems
 - Most important content is hard to find
 - Too much time spent searching
 - Obsolete content
 - Don't trust all of the content
- **How to find answers vs finding documents?**



Challenge 2: Complicated Security

Technicians can inadvertently leak trade secrets:

- **Protecting Customer IP**
 - Be sure that when a technician collaborates they aren't exposing customer IP to competitors

- **Protecting Company Product IP**
 - Prevent piracy / reverse engineering of Applied Materials products, parts

- **Preserving Company Services IP**
 - Assure that customers pay for value-added services
 - Secure service methods from competitive service providers



Challenge 3: Too Many Systems

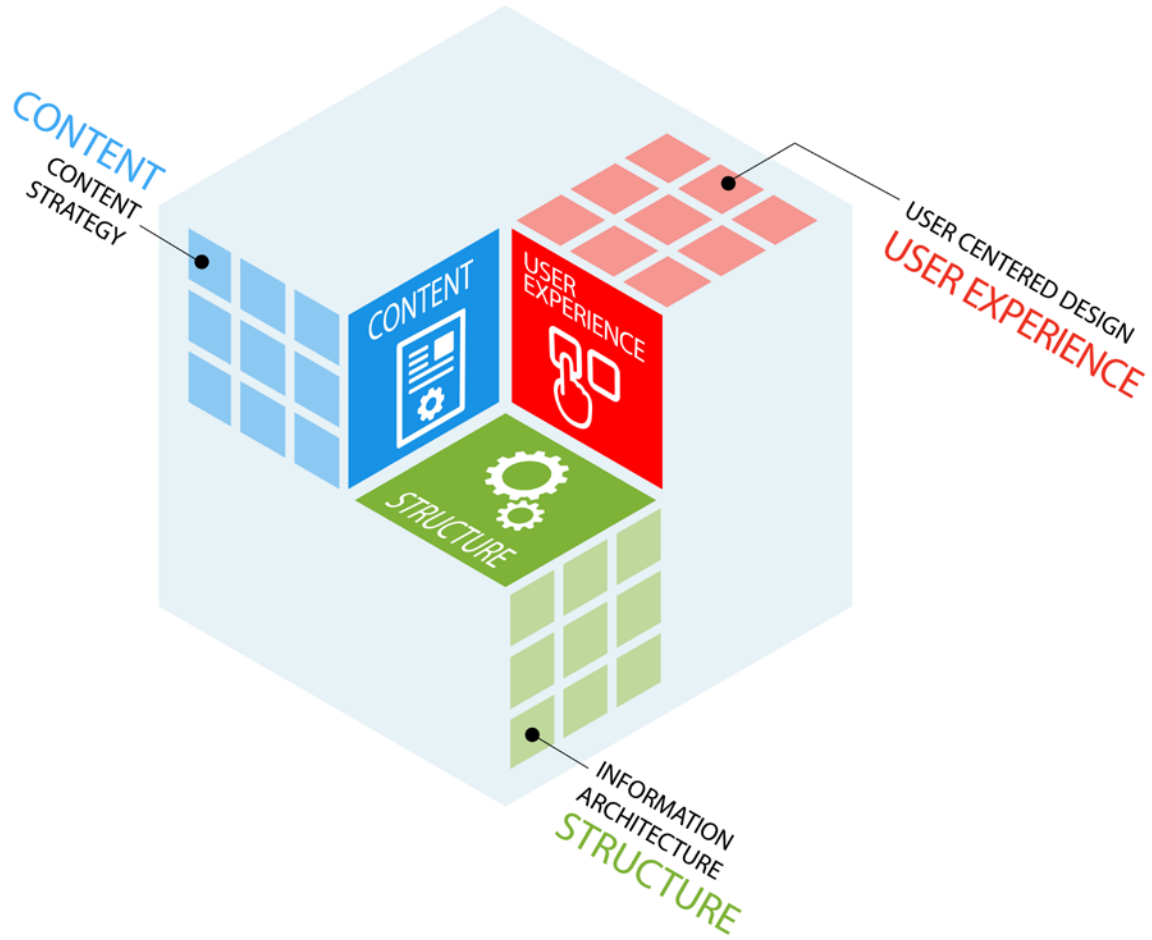
We don't need another system....

Technicians had dozens of systems and repositories – too many places to hunt for content





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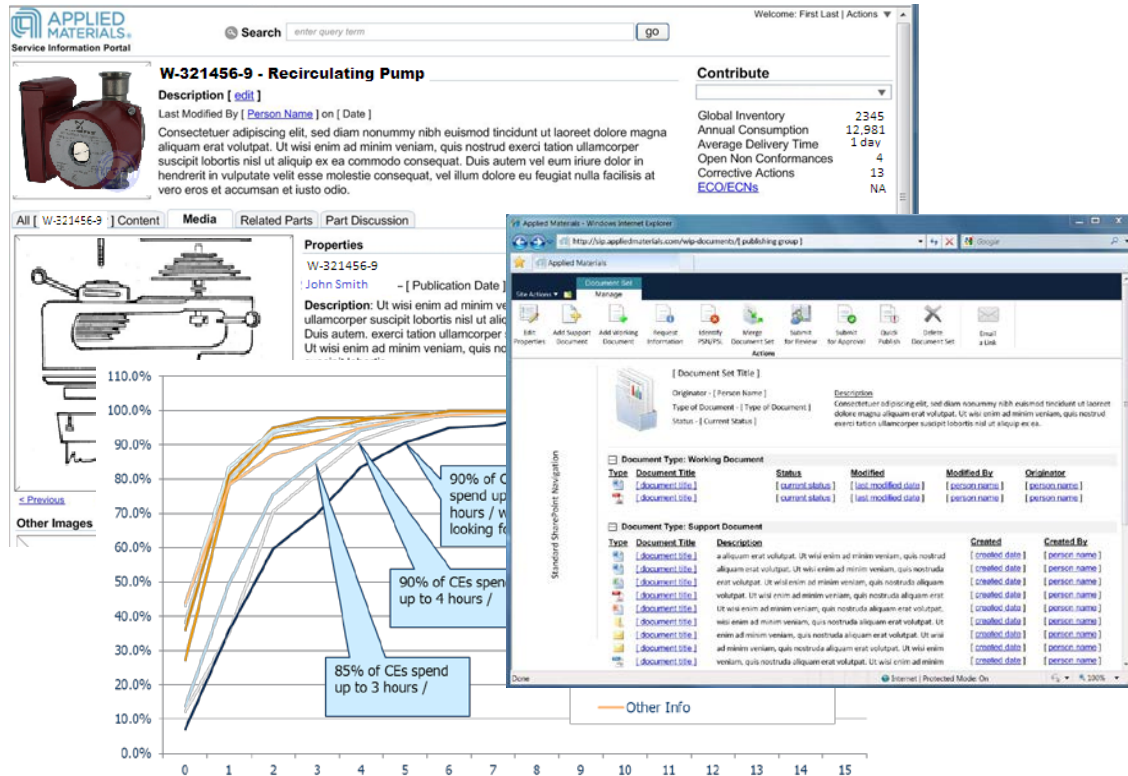
User Centered Design

UCD helped us design a solution people would use:

- DITL of technicians
- Surveyed 20% of techs
- 21 interviews with publishers & stakeholders
- What works, what doesn't
- Define success

Designed & tested a User Experience – then built it

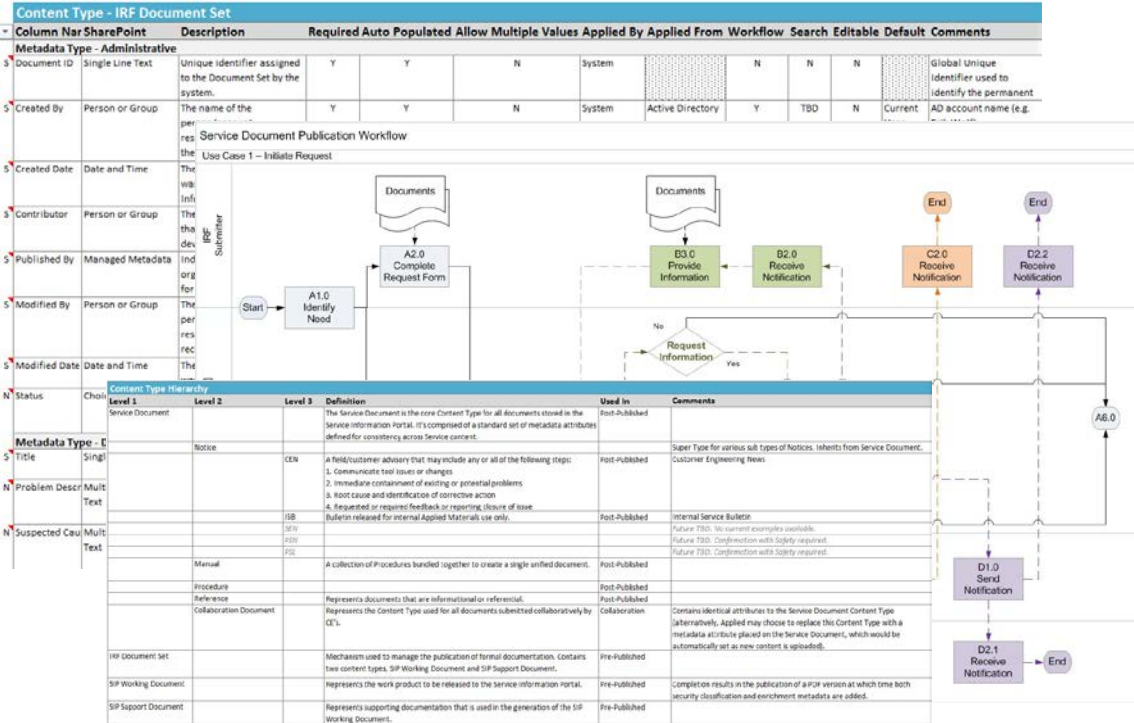
- Mock-ups before prototype



IA included SharePoint

- Taxonomy
- Content Types
- Metadata
- Workflow
- Site Structure

Everything we needed to power the User Experience and Search



Content Strategy focused on unifying access to content in order to **answer questions**:

- Continue **publishing** content the way we have – with better curation
- **Search-based application** with Product, Document, & Part views
- Combine **collaboration** (tips, forums, photos) & published content
- Either “chunk” large legacy documents or **search inside the document**
- Need to be able to take away critical information – “**research notebook**”



90% reduction in time spent searching for information

- Engineers can now easily find information about a part, preview or download part schematics, check on part availability, and see related parts and products.

10% improvement in the accuracy of search results.

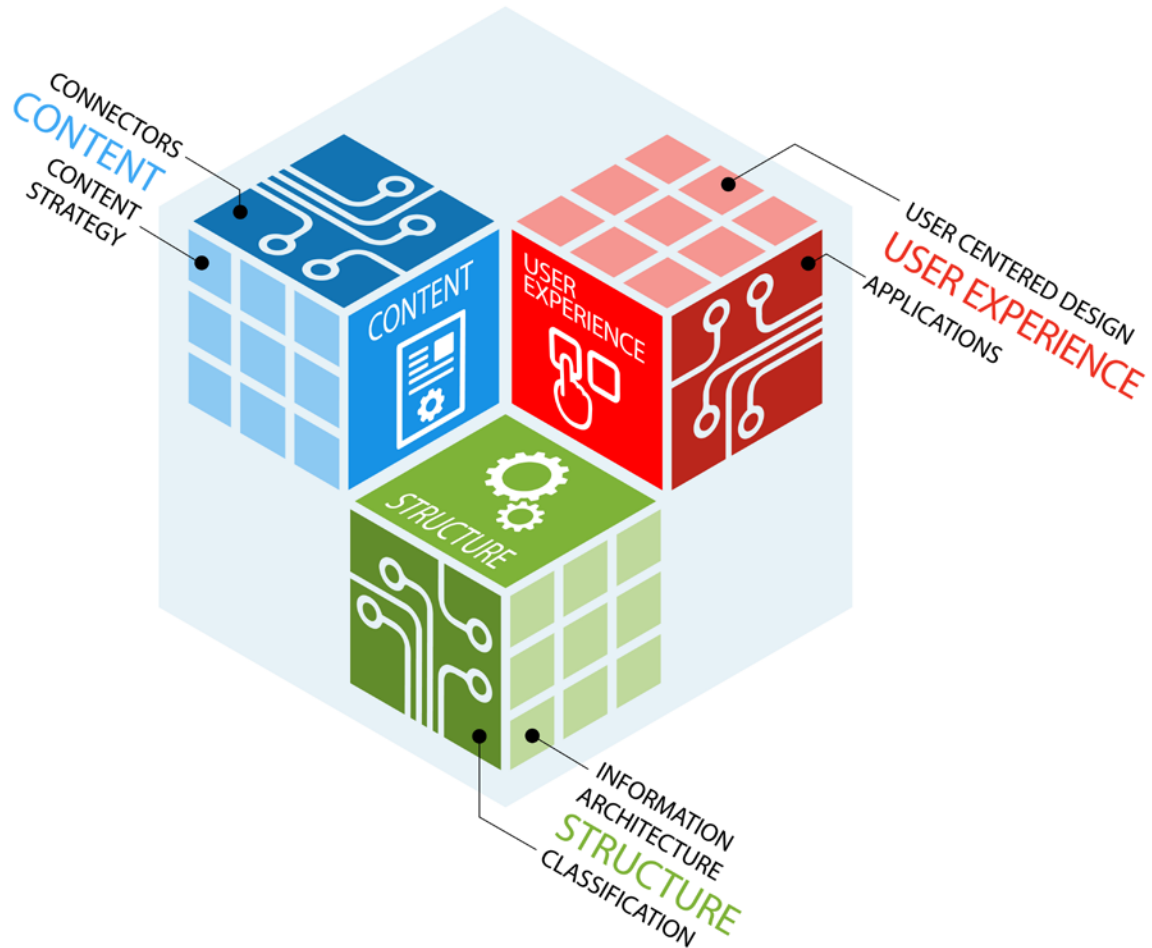
- Engineers more confident in the data because it helps them find the right answers to their questions more quickly, which in turn has translated into faster and lower cost resolution of customer issues.

Rules based document classification improved information access

- Allowed Applied Materials to protect its own intellectual property and the intellectual property of its customers and partners

Applied Rapid Knowledge (ARK) Portal

- Common centralized user interface eliminates need for engineers to learn 17 different search applications



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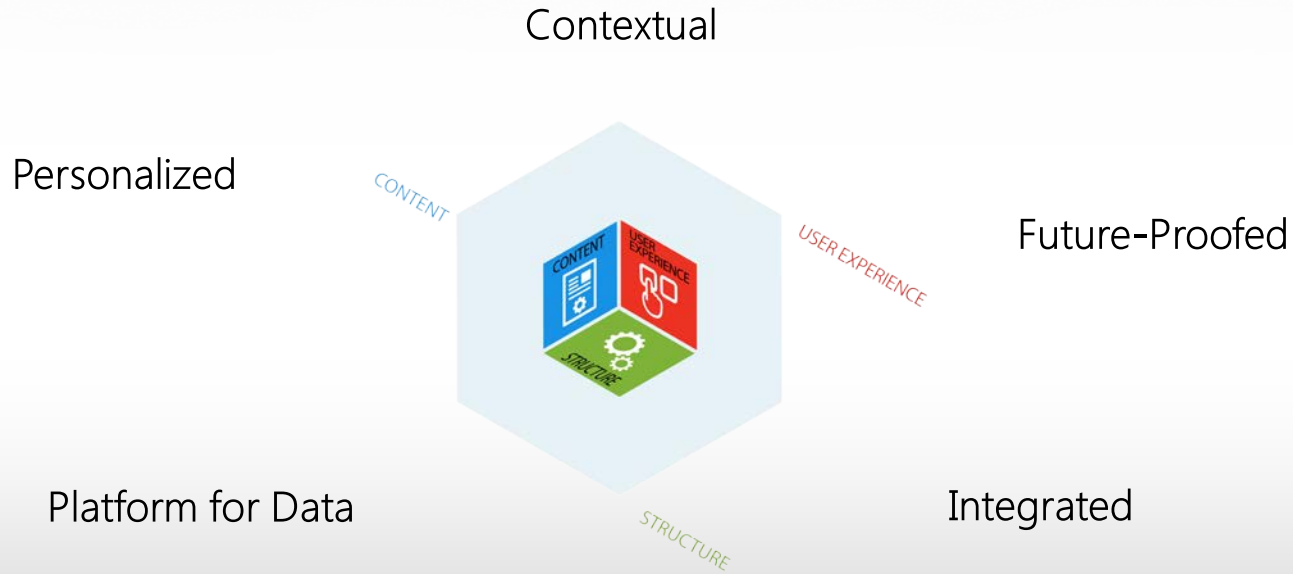


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TECHNOLOGY

Knowledge Portals

1. An integrated view of data sources including all relevant operational, historical, structured and unstructured data.
2. A contextual information architecture that organizes data, defines attributes and maps relationships to reflect the landscape of the business - its customers, products, people and processes.
3. A highly scalable platform for tagging, categorizing, finding and presenting data that has high volume, variety, and velocity while maintaining enterprise standards of governance and security.
4. A personalized digital user experience that streamlines the refinement of search results and provides a simple, intuitive approach for finding answers to complex business questions.
5. Future-proofing the implementation and simplifying upgrades with a “no customization” approach that makes it easier to support the environment over time.

Knowledge Portals include the missing ingredients



Unified View in Knowledge Portals

Seamless experience for users

- Don't need to know where content is

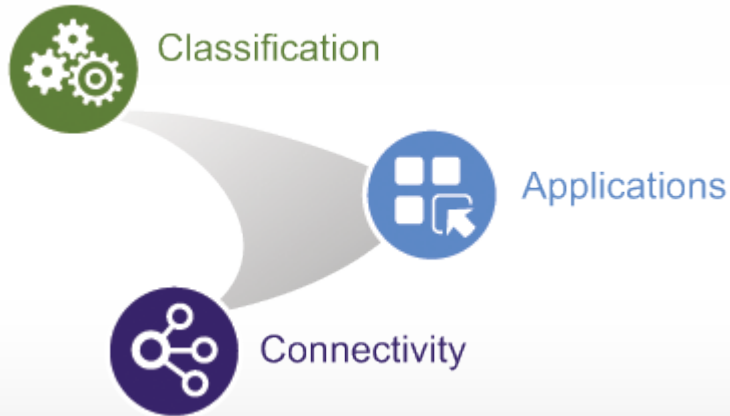
Bring in content from many systems

- Tap Business Critical content where it lives
- Secure; reduces load & risk on LoB systems

Unified Index drives the experience



BA Insight Software Portfolio



Classification - Auto-tagging, metadata generation, and text analytics to increase findability.

Applications – Smart Preview, Smart Analytics, Expertise Finder, InfoSites, Matter Comparison help users find the right information faster for improved productivity and increased adoption.

Connectivity - Secure connectors and federation to over 50 systems on-premises and cloud, and multiple search engines, enabling unified views of all knowledge assets.

Ingredient #1: Content

36%

of a typical knowledge worker's day is spent looking for and consolidation information spread across a variety of systems

61%

of knowledge workers regularly access 4 or more systems to get the information they need to do their jobs

15%

Regularly access 11 or more systems



Connectivity to MANY Enterprise Systems

Content and Collaboration Systems

- EMC Documentum
- EMC eRoom
- HP Trim
- IBM FileNet F8
- IBM Content Manager
- IBM Connections
- Objective DMS
- OpenText LiveLink/RM
- OpenText Hummingbird / eDocs
- Oracle CMS/Stellent
- IBM Lotus Notes
- Xerox DocuShare
- Confluence
- Alfresco
- Jive
- CuadraSTAR

Mailbox and Archiving Systems

- Microsoft Exchange
- Microsoft Exchange Online
- IBM Lotus Notes
- Symantex Evault
- Autonomy EAS / (Zantaz)

Legal Industry Systems

- Aderant Practice Management
- Autonomy Worksite (iManage)
- Elite/3E
- KnowledgeMill OnePlace
- LegalKey
- NetDocuments
- Practical Law
- AutoElite Prolaw
- RealPractice

CRM Systems

- Salesforce.com/Force.com
- Microsoft Dynamics CRM
- LexisNexis Interaction CRM
- Any SQL Based CRM

Databases

- Microsoft SQL Server
- MySQL
- IBM DB2
- Oracle Databases

ERP and Portal Systems

- SAP Business Suite
- SAP DMS
- IBM WebSphere
- Oracle WebCenter
- Interaction (PlumTree)

Search and Cloud Systems

- Microsoft SharePoint Online
- Google Drive
- SharePoint 2013, 2010, 2007, FAST Search for SharePoint
- Microsoft Search Server
- Box
- Scopus
- PharmaCircle

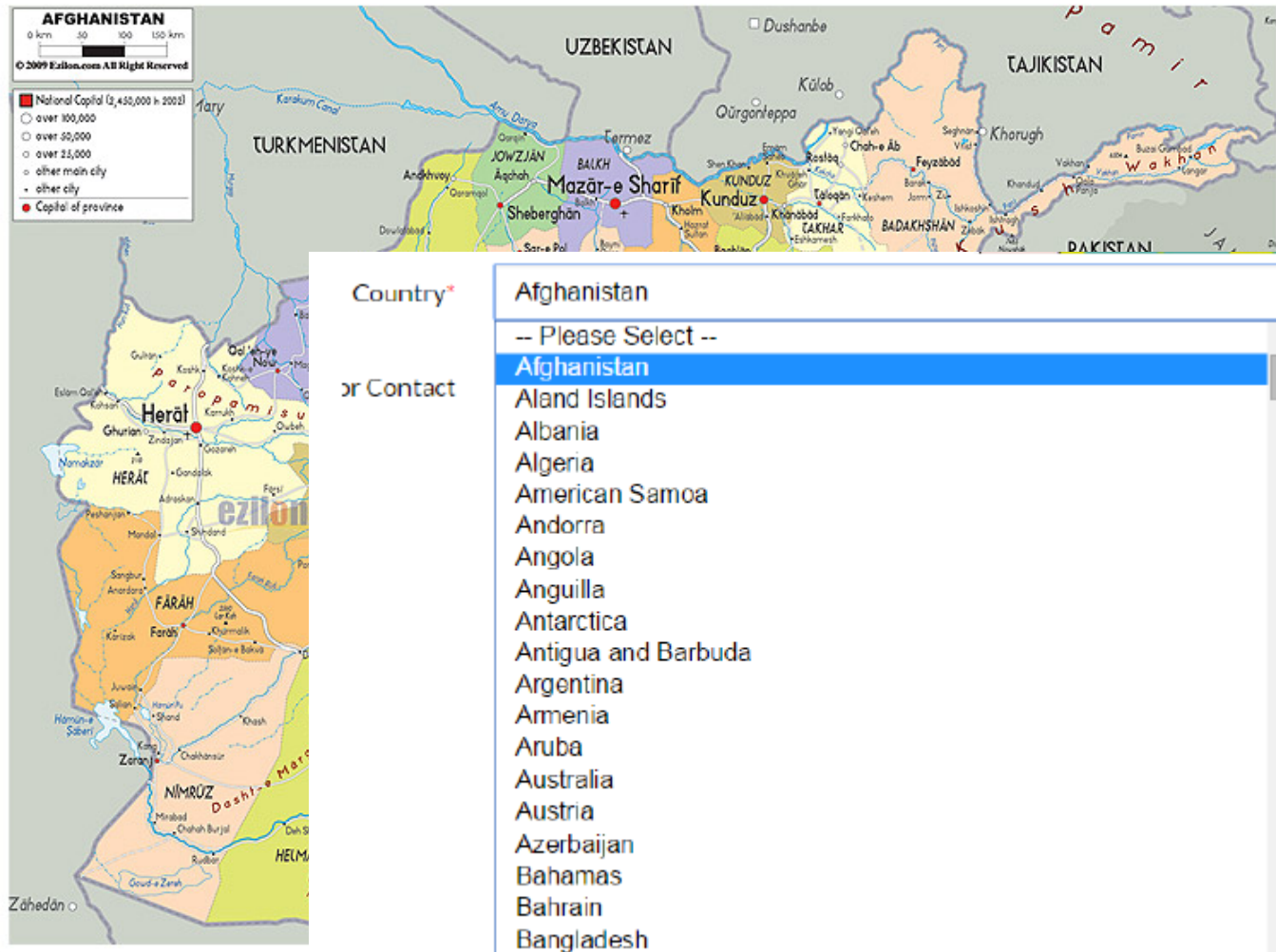
Ingredient 2: Add Structure

- Pay attention to information architecture
- Add machine generated metadata
- Bridge across structured and unstructured data

BUT don't go overboard



The Afghanistan Effect



Automated Classification and Metadata Generation

Populated Managed Metadata according to taxonomies in the SharePoint Term Store

Industry	Value (Publication Type)
Industry	Welding Companies; Inspections
Locations	Oregon; North; North Dakota; United; Ponca City; City
Organizations	Ray; TOP; PSI; Capacity; ACCESS; Engineering; DOE; Risk; A207; SAFETY; integrity; Company and; COMPANY; Squaw and; ACCEPT; COP; World Health Organization; PLAN; AND; Portable; Uncount; Form; USE; U.S.; Response; ACTIVE; Mobile
People	David T.; N; Wulf; Devik T; Helms; Thomas; Cadiz; Stalnaker; Wood; Cribbing; George F; Thomas; Diemeter; Manning; COP; Safety; Professional; David I; View
Body Regions	Back
Business Sectors	Back
Environment and Public Health	Confined spaces; Ventilation
Inorganic Chemicals	Steel

SharePoint Content

- Automatically adds metadata to SharePoint Lists and Libraries

Content from Anywhere

- Metadata populated in managed properties in the search index during crawling

Rules Driven

- Total control

Ingredient 3: Prebuilt Applications



Pre-Built Applications

speed deployment and “future-proof” upgrades

Visual Refiners

Search for Salesforce

Smart Previews

Matter Comparison

Expertise Locator

User-Generated InfoSites

Example: Project On Boarding

Thumbnails

Refinement

The screenshot shows a SharePoint page titled "On Boarding". At the top, there is a green icon of a folder with a document, followed by the title "On Boarding". To the right, there are links: "Subscribe to this topic", "Contact Topic Owner", and "Add Topic to My Feed". Below the title is a "Top Contributors" section with three profile pictures. The main content area is titled "Documents" and shows a list of documents in a grid view. The first document is "Fatca Onboarding FAQ" by John Doe, last modified 22-Mar-2. The second is "Best Practices for C..." by John Doe, last modified 22-Mar-2. The third is "Bridging the Advice" by John Doe, last modified 22-Mar-2. On the left side of the document list, there are refinement filters for "Category" (with a search box), "Video" (checked), "Background", "Engagement Setup", "Rate Card", "Delivery", "Useful Tips", "Status" (with a search box), and "Availability". A search box "Search Team" is located at the top right of the document list. A "Hover Panel" is visible over the second document, showing a search bar and search results. A "Document Preview" is visible on the right side of the page, showing a table with columns "Orientation" and "Onboarding".

Search Within Topic

Hover Panel

Document Preview

Example: Life Sciences Research

The screenshot shows a web browser window with the address bar set to 'about:blank'. The main content area is titled 'Lupus Erythematosus' and includes a search bar, a 'Subscribe to this topic' link, and a 'Contact Topic Owner' link. Below the title, there are navigation options for 'Grid' and 'List' views, and a 'Sort by: Status Service Line Role' dropdown. The main content area displays three search results for 'Systemic lupus erythematosus', each with a brief description, 'Extracted Entities', and 'People' information. A sidebar on the left, titled 'Refine your Search', contains a 'Timeline' chart and a 'Categorization' tree with various medical categories. A 'Hover Panel' is visible over one of the search results, displaying detailed information about 'Systemic Lupus Erythematosus (SLE)', including the author 'Melissa Stoppler, MD' and a 'Summary' of the disease.

Search Within a Subject

Refinement

Hover Panel



Apache Corporation, an independent energy company, explores for, develops, and produces natural gas, crude oil, and natural gas liquids

Challenges:

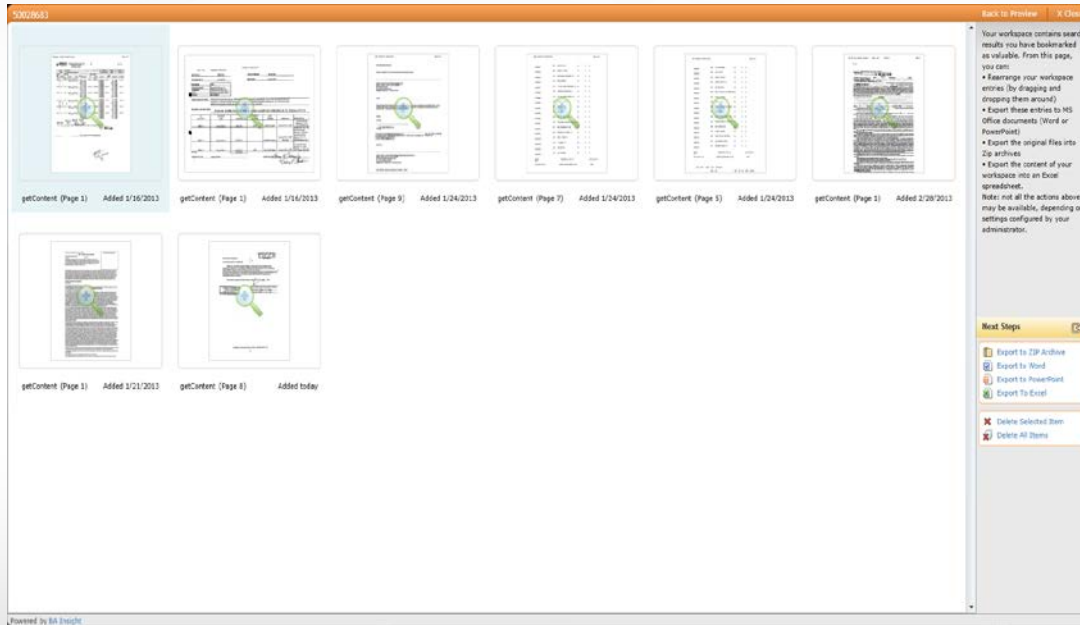
- Land lease information exists in multiple data systems.

Challenges:

- User had to look up in multiple systems to get a 360° view of a lease



Finding and reusing content across sources



The screenshot displays an 'Interactive Workspace' interface. At the top, there's a header with '50028683' and 'Back to Preview' and 'X Close' buttons. The main area is a grid of document thumbnails, each labeled 'getContent (Page X)' and 'Added [date]'. A sidebar on the right contains instructions: 'Your workspace contains search results you have bookmarked as valuable. From this page, you can:' followed by a bulleted list: 'Rearrange your workspace entries (by dragging and dropping them around)', 'Export these entries to MS Office documents (Word or PowerPoint)', and 'Export the original files into Zip archives'. Below this is a 'Note: not all the actions above may be available, depending on settings configured by your administrator.' At the bottom of the sidebar is a 'Next Steps' section with buttons for 'Export to ZIP Archive', 'Export to Word', 'Export to PowerPoint', and 'Export to Excel', along with 'Delete Selected Item' and 'Delete All Items'.

Interactive Workspace

Property Master Data from Tobin

SMITH #1-17H - 50028676

Property Name: SMITH #1-17H
Property Number: 01552101
State: OK
County: BECKHAM

Documents related to this Property:

SMITH #1-17H - 50028676
Any Peyton asked me to forward you the enclosed Affidavit filed on behalf of Peyton Royballes, LP regarding their mineral interest in the SW/4 of the referenced tract.
Authors: FNCLA.MineralRegist@apachecorp.com
Document Type: Correspondence
Document Class: Division Order
Source Document

SMITH #1-17H - 50028683
THIS ASSIGNMENT, CONVEYANCE AND BILL OF SALE (this "Conveyance") is executed by Grantor to Grantee effective as of the Effective Time listed above.
Authors: FNCLA.MineralRegist@apachecorp.com
Document Type: Deed
Document Class: Deed
Source Document

SMITH #1-17H - 50028681
1-A-2-A-1(-4)-1-F-1-Q-7-2-
Authors: FNCLA.MineralRegist@apachecorp.com
Document Type: Deed
Document Class: Deed
Source Document

SMITH #1-17H - 50028682
THIS ASSIGNMENT, CONVEYANCE AND BILL OF SALE (this "Conveyance") is executed by Grantors to Grantee, effective as of the Effective Time listed above.
Authors: FNCLA.MineralRegist@apachecorp.com
Document Type: Assignment
Document Class: Assignment

Related Documents from FileNet



Global Law Firm
31 Countries
77 Offices

Overview

The DLA Piper Group has a worldwide network of about 8,000 lawyers operating in Asia, Europe, the Middle East, and the US

Everything matters...


iSearch Home Page





The navigation bar features the iSEARCH logo in white on a blue background. Below the logo are several tabs: FUSION (highlighted in yellow), iTEAM, iMANAGE, CLIENT, MATTER, and EXPERTISE. A search input field with a magnifying glass icon is positioned to the right of the tabs. Below the input field, the text 'SEARCH FOR:' is followed by three radio buttons: 'All words' (selected), 'Any words', and 'Exact Phrase'.

Blue callout box pointing to the search tabs: Tabs for different search applications

My Recent Matters

-  Racing Matters
▼ MORE DETAILS
-  Union Square
▼ MORE DETAILS
-  Massachusetts Financial Services Company Litigation
▼ MORE DETAILS
-  Common Matters
▼ MORE DETAILS
-  Independent Investigation by Secretary Cohen
▼ MORE DETAILS

My Recent Documents

-  Address Labels
▼ MORE DETAILS
-  Address Labels 2
▼ MORE DETAILS
-  Falby MCLE Case List
▼ MORE DETAILS
-  M.G.L.A. c. 171 §65C1/2
▼ MORE DETAILS
-  Warning: Not Updated
▼ MORE DETAILS

Blue callout box pointing to the 'My Recent Matters' and 'My Recent Documents' sections: Personalized information

iSearch Metadata

Matter Name

Matter Number

WestKM Doc Type

WestKM Doc Sub Type

Area of Law

Governing State Law

Judge

Jurisdiction

Citations

Document Type

Document Library

Application

Modified Date

Gamma - CA Credit Authorization - 4-14-11 [PREVIEW](#)
Advanced Molecular Imaging, Inc. Type of Business: Medical Imaging Device Manufacturer Principals: Brad Palt, PhD – President & CEO ... Richard Drinkward – CFO Type of Entity: C-Corp ...
Doc Number: 223307740 Author: Tigue, Craig M. Modified Date: 4-15-2011
Client: Western Alliance Bank Matter: Gamma Medica-Ideas, Inc.
[+ MORE DETAILS](#)

UNIVERSITY OF SOUTHERN CALIFORNIA [PREVIEW](#)
DLA Piper's Response to University of Southern California's Request for Proposals ... Selected Distinguishing Facts and Figures 3 ... Our Proposed Team and Communications with USC 5 ...
Doc Number: 258604285 Author: McClure, Lawrence J. Modified Date: 5-22-2015

Document Type

Enter Document Type

Release/Etc. (39)

Corporate and Securities (31)

Transfer Pricing (24)

Patent Application Document (22)

General Tax (18)

Memo (17)

Working File/Atty Notes (9)

Forms and Masters (7)

Due Diligence (3)

Intellectual Property/Trademarks/Patents (3)

List/Chart/Index (3)

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DLA Piper's Response to University of Southern California's Request for Proposals ... Selected Distinguishing Facts and Figures 3 ... elements in a successful patent prosecution 14 ...
Doc Number: 248574982 Author: McClure, Lawrence J. Modified Date: 6-23-2014

Refinement with multiselect and search within metadata

iSEARCH nanotechnology [SEARCH](#)

FUSION | TEAM | **iMANAGE** | CLIENT | MATTER | EXPERTISE

Doc number or title

Office

Practice

Author

Client Name

Client Number

Matter Name

Matter Number

WestKM Doc Type

WestKM Doc Sub Type

Area of Law

Judge

Citations

Document Type

Document Library

Application

Modified Date

Citations: US Patent 7,250,148 Proc. 6641 Proc. 6644, 664413 (2007) Proc. 6452, 645211 (2007) [Remove All](#)

Sort by: Relevance [EXPORT](#) 1-10 of 21 Results [PREV](#) [1](#) [2](#) [3](#) [NEXT](#)

NONEXCLUSIVE LICENSE AGREEMENT [PREVIEW](#)
CA 94089 and Continental Carbon Nanotechnologies Inc. ("CCNI"), a Delaware corporation ... WHEREAS, Unidym owns patents and know how covering chemical vapor deposition synthesis of ...
Doc Number: 248513420 Author: Ryan, Stephen M. Modified Date: 6-18-2014

Citations for NONEXCLUSIVE LICENSE AGREEMENT

1: US Patent 7,250,148

2: US Patent 7,250,148

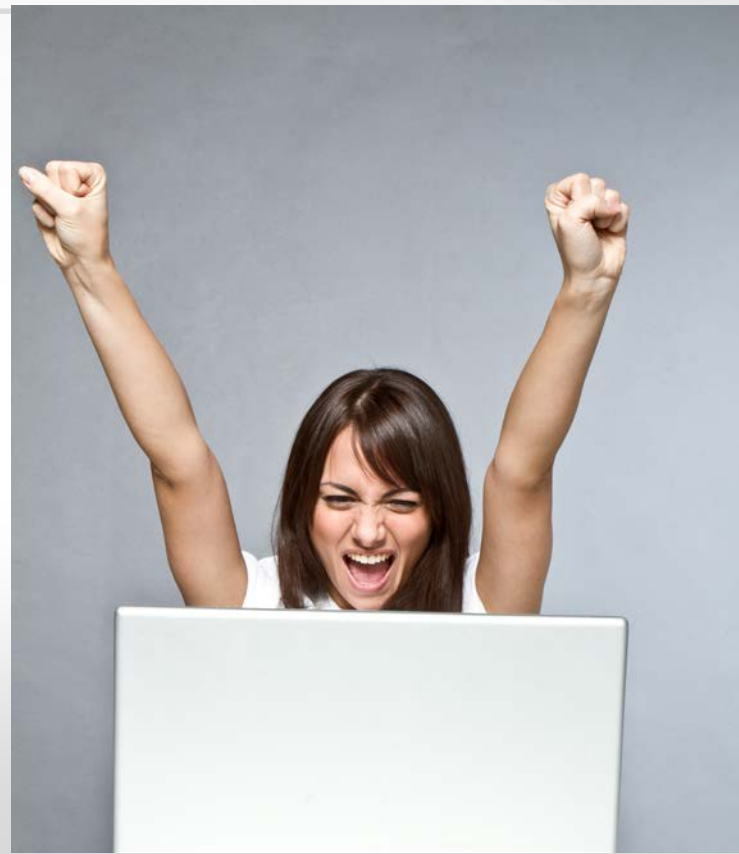
NONEXCLUSIVE LICENSE AGREEMENT [PREVIEW](#)
CA 94089 and Continental Carbon Nanotechnologies Inc. ("CCNI"), a Delaware corporation ... WHEREAS, Unidym owns patents and know how covering chemical vapor deposition synthesis of ...
Doc Number: 248575001 Author: Ryan, Stephen M. Modified Date: 6-23-2014
Client: Continental Carbon Nanotechnologies Inc. Matter: Unidym lawsuit
[+ MORE DETAILS](#) [SHOW CITATIONS](#)

23 June 2014 - Unidym License Agreement with CCNI [PREVIEW](#)
CA 94089 and Continental Carbon Nanotechnologies Inc. ("CCNI"), a Delaware corporation ... WHEREAS, Unidym owns patents and know how covering chemical vapor deposition synthesis of ...
Doc Number: 248574982 Author: Ryan, Stephen M. Modified Date: 6-23-2014
Client: Continental Carbon Nanotechnologies Inc. Matter: Unidym lawsuit
[+ MORE DETAILS](#) [SHOW CITATIONS](#)

Citations with clickthrough

Results – User Perspective

- MUCH easier and faster to find all available knowledge in the firm
 - Easy access to LOB data
 - Eliminate download waits
 - Seamless reuse of content
- Better insight
 - Single view across data silos
 - Exploration of content
 - Direct recall of all relevant information for a client or matter
- More efficient attorney work stream
 - More time focused on client
 - Reduced gap between billable events

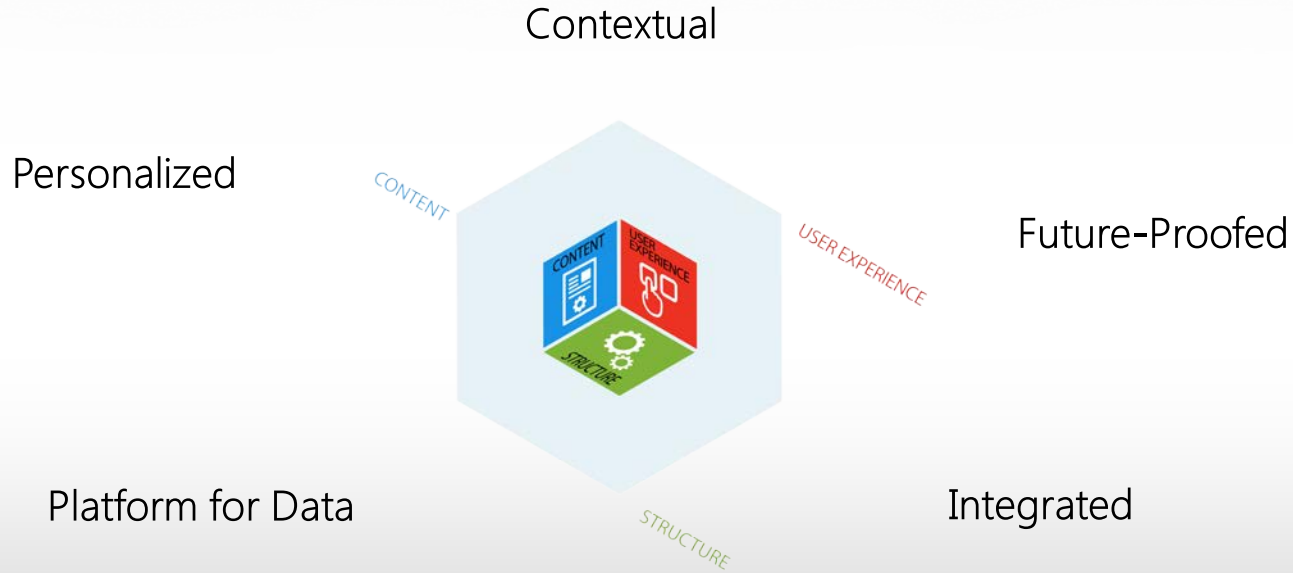


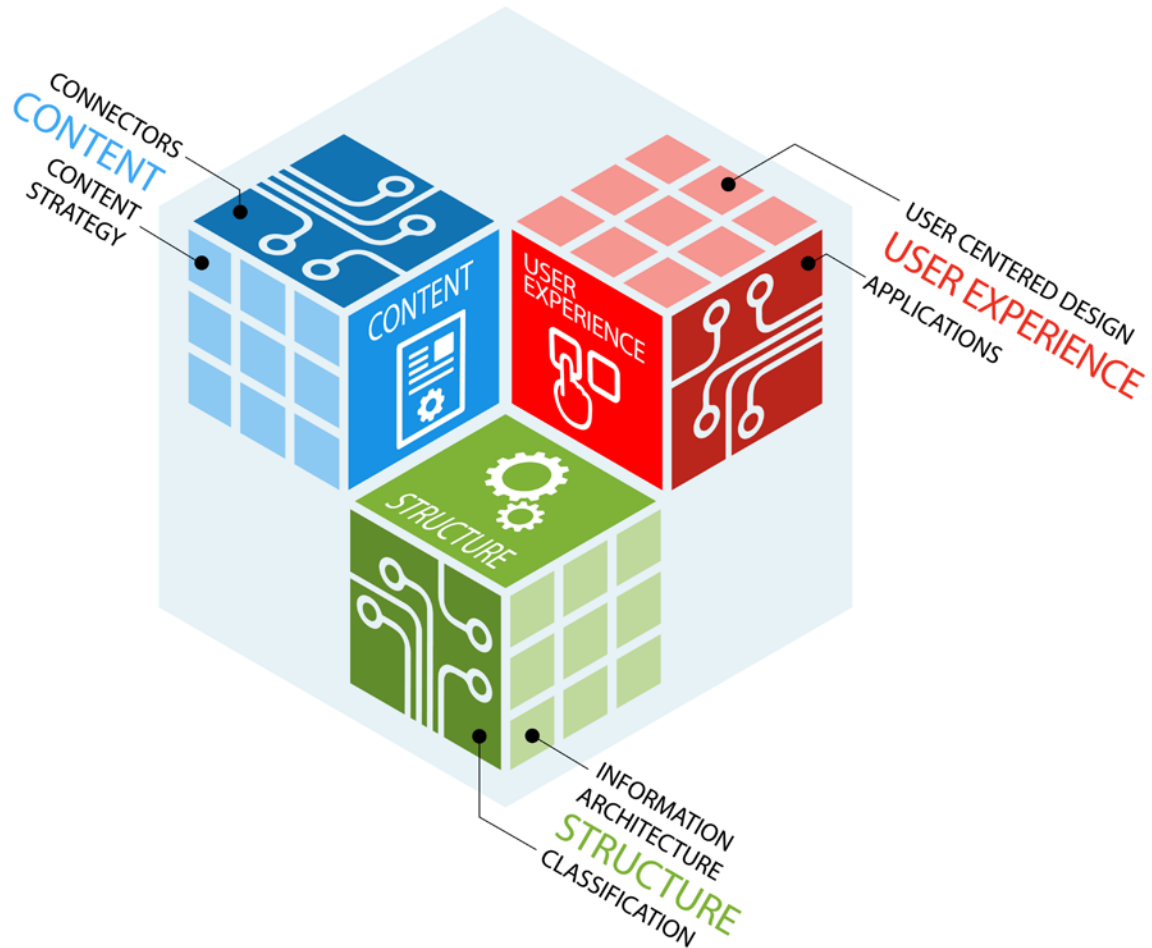
Results – Business Perspective

- **Time savings**
 - Efficiency and productivity
 - Quicker, more effective assembly of essential expertise for a given matter
- **Improved processes**
 - Accelerated staffing process
 - Better response to critical time-sensitive client queries
 - Dramatically improved business development
- **Competitive advantage**
 - Enhanced client service
 - More effective proposals for new work
 - Agile foundation for more search-driven applications



Knowledge Portals include the missing ingredients





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BA INSIGHT
TECHNOLOGY

Your Questions and Answers

Today's Speakers



Paul Wlodarczyk
VP, Client Services
Earley Information
Science

Leads enterprise digital transformation projects
30 years' experience in unstructured content
lifecycle and related technologies

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Jeff Fried
Chief Technology
Officer
BA Insight

Long time Search nerd
Passionate about search, SharePoint, search-
driven applications

Jeff.fried@bainsight

@jeffried

Offer – Call to Action



- **Meet the Experts (1 Hr. Q&A via con-call)**
- **Knowledge Portal Strategy Session**
- **BA Insight Product Demo**

Contact info@bainsight.com OR
info@earley.com to set up a meeting.

Thank you!
