



SharePoint for Internal and External Portals

Another SharePoint Success Story

Scenario

Our client had a legacy Oracle portal, shared by internal and external users, and also had some customer-facing content. This self-service web portal was built on soon to be unsupported technology accessing soon to be replaced databases.

The Client needed a portal where internal users, and external insurance agents and agencies, could get secure access to

relevant information for their respective level of security.

For example:

- an Agent should be able to see only his clients' information
- the Agency should have access to all of its agents' client information

Aoibri Process

The Aoibri Business Team worked with the IT department and the Business Users to determine the technical and more importantly the unspoken requirements for web portal. We worked with the Business Users to determine what additional features could be added on to the portal to improve customer efficiency and satisfaction. We worked with the IT department to understand the requirements of the new data warehouse.

We were able to understand that these internal and external users needed to be as independent as possible **because this business was in the business of insurance and not the software business**. They were not prepared to become first level support for external users with access problems, password replacements, custom report requests and so on. Considerations like:

- the Agency should be able to independently manage their users (add, edit, delete users without needing the Client's IT involved)
- Agencies should be able to Generate commission reports for their agents and sub-agencies
- Users should be able to search for and review pending policy renewals
- Users should have access to documents including: policy applications, claim submissions, corporate marketing materials, company news, and company policies and procedures



Aoibri Expertise





The answer to these and other business questions enables the team at Aoibri to define the system requirements. Business Processes become workflows and phases, workflow phases become features, tasks become taxonomy, and work products become content types. All of this together becomes

the Information Architecture (IA). The IA provides the facts that become Navigation, Site Hierarchy, Content Types, and Managed Metadata. Once the IA is documented and understood then the UI designs come together showcasing intuitive navigation and usability.

Aoibri Results

Understood and documented business requirements, documented information architecture, a UI design, and a project plan, now this client is ready to make the most of SharePoint.

Recurring return on investment is a very good thing. The Microsoft SharePoint platform offers us some very important ways to increase the return on that initial SharePoint investment.

-  Leveraging the hierarchy of your Active Directory
-  Leveraging metadata for navigation
-  Self service reports and Dashboards
-  Leveraging the same platform that internal portal is on to serve external users