# PHONEBOOK SOLUTION FOR SHAREPOINT

FOCUSED SOLUTIONS

Within many businesses the challenge to provide an up-to-date functional phone book application can be a difficult.

The ability to find a contact and clearly identify their details enabling getting in touch in a timely manner, can be quite difficult with traditional contact sheets. Many groups rely on excel spreadsheets and information provided by the mail system (i.e. Outlook) where the user needs to have an account to be continually managed.
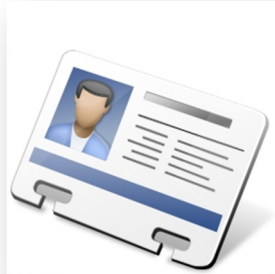
Within the health care industry, this management issue can be compounded where only up to a third of users have a network account, the majority of other staff (doctors, nurses, volunteers, etc.) use a group network login or have no access to the network.

Why use SharePoint

Many groups have invested in SharePoint for document management or collaboration, yet fail to leverage their SharePoint for organisational effectiveness in other areas. Recent advances in SharePoint has strengthened its credentials as a tool for collation and dissemination of diverse sources of organisational information, which is sometimes located in legacy systems that are not designed to work together.

The use of SharePoint allows us to create solutions and combine separate information sources in order to deliver a single interface for contact information regardless of its source.

Sharing Minds has developed a "plug-in" module that enables customers to quickly and easily deploy a functioning and effective "Phone Book" within their SharePoint environment. This "Phone Book Module":

- Reduces development and deployment time
- Can be customised to individual client needs
- Has been proven to work effectively in multiple industries (including health)
- Leverages existing investment in SharePoint as a primary tool for business improvement

CONNECTING CALLS

In order to develop a Phonebook solution, a number of requirements need to be defined to enable the solution to meet the needs of different business units.

The following are some of the core solution guidelines that the Phonebook solution has been developed:

- ➢ Information from network sources to create corporate profiles
- ➢ Ability to manage group based and no access profiles within the Phonebook solution
- ➢ Ability to provide an A-Z listing of users
- ➢ Ability to link users to their departments and schedules

OUTCOMES

Sharing Minds has been able to create a SharePoint Module to deliver a centralised "Phonebook" solution that maps network users automatically with external contacts which enables users to find everyone in one convenient location. This means that support and upkeep of contact lists is minimised and can be administered easily.

BENEFITS

By utilising the Phonebook solution organisations have been able to realise a number of intended and additional benefits including:

- A single location to find contact details regardless of their source
- Management of Contractors, Volunteers, Clinical staff and suppliers
- Easier access to refine phonebook results through 'intelligent' department searching
- Use of Phonebook contacts in other SharePoint areas (i.e. Document Management)

SOLUTION DEVELOPMENT

Leveraging knowledge about existing phonebook applications and directory management systems that track information (like Microsoft Active Directory), the Phonebook solution was developed to integrate and utilise the existing contact management framework developed into the Microsoft SharePoint platform.

The solution was created, so that it could work across the entire environment and maintain contact information on multiple types of contacts, while maintaining security ensuring that users only see the contacts they are supposed to. Below is a screenshot of a live Phonebook solution for a national health care provider:

The solution uses a combination of standard Microsoft SharePoint technology and a small custom built component to manage the integration between non-network contacts and network contacts ensuring that everyone can be found in one location using one format.

The SharePoint Phonebook in action

HOW WAS IT DONE?

Microsoft SharePoint technology provides a great platform for the gathering of user information and contact profiles. By utilising this platform first and then customising a process framework and user, this Phonebook solution

- ➢ Provides one interface for the display of all contacts
- ➢ Provides standard interfaces for the management of contacts not stored within the corporate network (i.e. Active Directory)
- ➢ Allows Phonebook users to be tagged in other SharePoint functions (i.e. Document Management)

Using our understanding of Microsoft SharePoint, this solution was created utilising simple jQuery scripts for visual formatting, some custom XML to format results and a small custom component requiring no additional server impact.

ABOUT SHARING MINDS

At Sharing Minds we take a customer first approach to reaching outcomes, be it a technical solution or a strategic business roadmap. Everything we do is about 'Connecting People to their information' and ensuring that your business can get the outcomes it needs when it needs it.

We work *with* your business as no one knows your business like you do.

We provide support through four main core business areas including:

Strategy – Assisting organisations to position their technical roadmaps, align to core business values and outcomes and measure deliverables.

Consulting – Our team have a depth of experience in the delivery of technology solutions to organisations across a multitude of industries. Our focused teams will assist your organisation to position your projects for the best possible outcome.

Support – Organisations implement complex technology solutions to help solve business needs. And often technology teams are overworked running the platforms the organisation needs. Sharing Minds can assist your organisation in achieving support and maintenance outcomes through our detailed support packages.

Applications – Often the right solution involves getting the right product as opposed to bespoke solutions, Sharing Minds maintains a number of in-house solutions and partner products that will help your organisation without large development costs.