

# The SharePoint Solution

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**Balfour Beatty**

reSOLVE

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Monday, 30 April 2012  
Christine Vergos, HR Director  
Rick Roman, IT Specialist  
Balfour Beatty  
3100 McKinnon Street, Tenth Floor  
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Dear Ms. Vergos and Mr. Roman:

Balfour Beatty is an established company with years of growth and success. Through this business growth, BBdocs has accumulated an extensive document repository. You need an infrastructure that will allow employees and administrators to more efficiently access and maintain documents, and SharePoint will serve as the perfect platform.

As a company that solves problems, we at reSOLVE have extensively researched SharePoint's capabilities and have created taxonomy and governance systems that will maximize SharePoint's potential. Our solution will benefit Balfour Beatty in the following ways:

- Users will spend less time searching and more time working; our taxonomy is intuitively organized, streamlined, and allows users to find any document in four clicks or fewer.
- With our governance plan, administrators will be able to manage content by using all of SharePoint's features, from retention schedules to document tagging.

In the following proposal, we demonstrate our commitment to helping Balfour Beatty organize and manage BBdocs during and after the move to SharePoint. The entire reSOLVE team is excited to work with you to make this project a success.

Regards,

Holly DeBower  
Project Manager



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## Identifying Balfour Beatty's Needs

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Balfour Beatty is making the switch from BBdocs to SharePoint. You need a company with SharePoint expertise to assist in making the transition a smooth and effective one.

ReSOLVE understands SharePoint and its many capabilities, and we want to maximize SharePoint's features to make the changes that Balfour Beatty staff and administrators want:

- A simple taxonomic structure that will be easy to navigate
- A document repository only going three folders deep, so users may locate documents quickly
- A standardized naming system for future documents
- Alphabetical organization to assist users in locating documents
- Comprehensive tagging and numbering for all of Balfour Beatty's documents
- A top-down governance system that allows select administrators to upload, edit, and delete documents
- SharePoint's retention schedules to help administrators keep documents up-to-date
- Marketing flyers, e-mails, and brochures to alert and educate Balfour Beatty employees on the new SharePoint system, taxonomy, and governance procedures



# Creating a Plan

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## Organizing Documents

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The reSOLVE team put together a comprehensive and easy-to-use taxonomy to maintain all of Balfour Beatty's documents in SharePoint. With the new taxonomy, end users can find the information they need with improved document grouping, naming, and overall organization.

To create this taxonomy, our team first explored BBdocs and the existing structure of classification. The first column of folders consists of seven main folders grouped by file type, procedure type, or document association. This causes a problem for users looking for documents because it lacks an intuitive structure. Employees may have to click through a variety of different folders and subgroups to find what they are looking for rather than having their documents grouped together in a more comprehensive format.

People like to find documents easily and without frustration. ReSOLVE's proposed taxonomy does just that by only going three folders deep, with the fourth click or earlier being the desired document.

We also observed that the first group of folders has the labels "Tier 1-7" before the folder name. Including these labels on the folders confuses the users because they suggest that certain folders are more important than others. For consistency and clarification, we took out the "Tier 1-7" naming methodology and just let the individual departments be the folder's names.

Our proposed taxonomy classifies and labels the first column of folders by departments:

- Finance
- Human Resources
- Information Technology
- Legal
- Loss Prevention
- Marketing and Communications
- Operations

The second and third columns are subfolders within the main department groups. These subfolders are again grouped into like categories to assist employees and administrators in quickly finding what they need.



## Grouping Folders

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Here we have an outline of the new taxonomy for existing and future Balfour Beatty documents. For a more detailed taxonomy that lists the specific documents that should be moved into the folders, find the “Document Level Taxonomy” that is located in the Reference section.

### ➤ Finance

- **Accounts Payable**
  - Cash Management
  - Corporate Services Desktop Procedures
  - General Departmental Information
  - Purchasing
- **Billing and Invoicing**
- **Budgets**

### ➤ Human Resources

- **Compensation and Benefits**
  - Benefits
  - Payroll
- **Employment**
  - Job Descriptions
  - New Hire Paperwork
  - Relocations and Transfers
  - Standards of Conduct
  - Travel and Other Expenses
- **Talent Management Tools**
  - Adding Employees
  - Performance Management
  - Project Management
  - Terminations and Job Changes
- **Training and Development**
  - Career Development
  - Training

### ➤ Information Technology

- **Departmental Procedures (IT)**
  - Audits
  - System Maintenance and Changes
- **IT Roadmap**
- **Remote Access**
- **System Requests and Purchases**

## Naming Documents

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In order to speed up the search process, reSOLVE suggests a new method of naming documents. Currently, many documents share the same name or do not have clear titles. Employees must then spend more time opening multiple documents to find the one they want. To fix this, reSOLVE suggests three steps to clarify document names and speed up the search process:

- 1) Begin each document name with what the document covers.
- 2) Determine the type of document and include it in the title. Document types include terms like policy, procedure, overview, and form.
- 3) Alphabetize documents.

At reSOLVE we understand Balfour Beatty's need to use time efficiently. To alleviate some of the effort required to rename existing documents, we identified over 150 documents that need title adjustments. We are providing this list of documents, as well as name suggestions. Refer to the Document Name Change spreadsheet in the Reference Information section.

One example of an overarching name change suggestion is how to name the "Best Practices" folder. Best Practices is currently constructed as "Tier 5- Best Practices → CSI Division 1-15." We have moved Best Practices to "Operations → Best Practices → CSI Division 1-46," and added a crucial element to the labels. Instead of just being labeled "CSI Division #," they are now labeled with the division number followed by a brief descriptor:

### Operations

- Best Practices
  - CSI Division 01: General Requirements
  - CSI Division 02: Site Construction
  - CSI Division 03: Concrete
  - CSI Division 04: Masonry
  - CSI Division 05: Metals

These new labels further identify the folders so that workers can more easily locate the information they are looking for.

## Assigning Roles

This proposal includes a governance plan to outline the document workflow and assist with on-going maintenance. The plan clarifies how employees manage documents based on their roles. The employee's needs determine their roles within SharePoint. Most employees need read-only access because they simply need to locate information; however, a few employees need to management documents within SharePoint. The four employee roles are described in Table 1 below.

**Table 1 SharePoint Roles**

| Role                         | Number of Employees                     | Permission Type  |
|------------------------------|---|--|
| <b>General User</b>          | Majority of employees                   | Read-only access   |
| <b>Document Manager</b>      | Several employees in each department    | <ul style="list-style-type: none"> <li>• Editor: Approves documents for upload</li> <li>• Publisher: Uploads final product</li> <li>• Administrator: Manages permissions to content</li> </ul>   |
| <b>Department Super User</b> | One for each department represented     | <ul style="list-style-type: none"> <li>• Maintains same permissions as Document Manager</li> <li>• Controls archiving and deleting outdated content</li> <li>• Chooses and trains new Document Managers</li> <li>• “Go-To” Person for Document Managers in the department</li> <li>• Acts as Term Store Administrator</li> </ul> |
| <b>Super User</b>            | 2 or 3 employees from the IT department | <ul style="list-style-type: none"> <li>• System wide access to address special requests</li> <li>• “Go-To Person” to filter any SharePoint issues</li> </ul>   |

Only a few individuals receive Super User access. This small group has the ability to do anything within SharePoint. Users are responsible for overseeing the SharePoint system, so system requests and issues would be filtered through this group. For example, when an employee transfers to the documentation team, their Department Super User might request that the Super User update the new person's SharePoint role from General User to Document Manager access. An example of a SharePoint system issue is if the system fails to publish the latest

# Implementing the Plan

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## Taking the Steps

The marketing documents in the previous section, work with the below steps to assist with the transition from your current system to SharePoint:

| Step | Purpose                              | Action  |
|------|--------------------------------------|---|
| 1    | Announce the upcoming change         | Display posters created by reSOLVE.   |
| 2    | Prepare SharePoint                   | Set up the folder structure prepared by reSOLVE.  |
| 3    | Prepare BBdocs                       | Review documents to assure they are up-to-date and relevant. Delete or archive documents, if needed.  |
| 4    | Clarify titles                       | Review existing document titles to assure they reflect contents and are understandable. Rename documents, when needed. Use the Document Name Changes spreadsheet provided by reSOLVE.                                     |
| 5    | Begin the transition                 | Copy all documents over to the new folder structure.  |
| 6    | Ensure publication and functionality | Test SharePoint to assure that: <ul style="list-style-type: none"><li>• documents publish in correct folders and display when opened</li><li>• functionalities work, such as uploading, searching, and tagging.</li></ul> |
| 7    | Announce the change                  | Upload and distribute the following documents designed by reSOLVE: <ul style="list-style-type: none"><li>• Your SharePoint Support Group</li><li>• Consulting a Professional</li><li>• The Map to Recovery</li></ul>      |
| 9    | Streamline document location         | Remove documents within BBdocs to leave one location for employees to find documents.   |

# Choosing reSOLVE

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## Identifying Key Differentiators

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SharePoint is a powerful platform and Balfour Beatty will benefit greatly from it. ReSOLVE understands SharePoint and has taken full advantage of its capabilities in The SharePoint Solution:

- We know that document numbering is important to IT, so we've included education on SharePoint's Document ID function.
- We also know how important document searching is for all users, so we made tagging a priority that is accessible and extended to everybody.
- Administrators will be able to manage time-sensitive or out dated documents with SharePoint's built-in archiving systems and retention schedules.
- We have included ways to utilize workflows, printing labels, and metadata in SharePoint.

ReSOLVE respects the employees of Balfour Beatty and wants them to look forward to the transition. We are excited to keep you and your employees involved in the transition process with flyers, emails, posters, and brochures. Along with these marketing documents, we have created a glossary of SharePoint features for users and administrators to use as on-going reference material.

Speaking to Balfour Beatty representative Christine Vergos, we learned that existing employees will handle the manual tasks involved in the BBdocs to SharePoint transition process. These manual tasks will be time-consuming for your employees, and we know that time is important to your company. ReSOLVE commits to reducing the amount of manual tasks and alleviating much of the internal workload. Our team has reviewed over 150 existing documents, organized them comprehensively, and provided name changes for them. The changes are documented with all information necessary for Balfour Beatty administrators to file them in SharePoint effectively. This means fewer manual tasks for your employees.



## Conclusion

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The Balfour Beatty name stands for success, quality, and expertise in its field. As an established company, you have many years of experience and a growing document repository to match. Your company needs an infrastructure that is user friendly and allows employees to quickly go through a forest of documents to find the information they need. Your employees and administrators need to be able to more efficiently access and maintain documents. Your decision to move your documents from BBdocs to SharePoint will benefit your employees. SharePoint is the perfect platform for your documents. Moving these documents from BBdocs to SharePoint will be a big transition, but we at reSOLVE have developed a plan to help you with this transition.

As a company with many years of experience resolving taxonomy issues, our company is familiar with organizing documents and creating transition plans to move documents. We have experience with SharePoint and have extensively researched the capabilities of SharePoint2010. The taxonomy and governance plan we created for Balfour Beatty will maximize SharePoint's potential.

The goal of our proposal is to demonstrate our commitment to helping Balfour Beatty organize existing documents and to help manage documents. Our proposal also includes a detailed transition plan to move documents from BBdocs to SharePoint. We are honored to present this proposal to you. The entire reSOLVE team is excited to work with you to make this project a success.



## Glossary

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This glossary has definitions for specific SharePoint functions referenced in this proposal.

|                     |  |
|---------------------|--|
| Check-in/Check-out  | This function allows documents to be locked when being edited. This prevents the document from being edited by more than one person at once, and it prevents users from viewing outdated information before it is updated.   |
| Document Columns    | These are customizable columns that hold the various metadata associated with the document. Any metadata in these columns, such as file size, document author, or date uploaded, can be searched through SharePoint to help employees locate the document faster.  |
| Document IDs        | This unique ID will be linked to the document. Any searches for the ID will directly open the document. The Document ID will consist of a prefix based on the folder it is in, for example HR, and then two numbers based on the folder and the document. SharePoint will assign these numbers as soon as the function is turned on for the library.   |
| Document Versions   | Document versions make it much easier to update new files. When turned on, this feature will save all old versions of a document, but only the newest version will show up in a search. This function is useful if the newest version is incorrect because any of the older versions can be restored if needed.  |
| Document Workflows  | Document workflows can be set up based on certain actions in SharePoint. Document workflows will be most useful for Balfour Beatty when connected to uploading documents. SharePoint will email the Document Managers when a document needs to be edited and uploaded and will give them a prompt asking whether they approve or not. This automated system will make it easier for the Document Managers to keep up with what needs to be done. |
| Enterprise Keywords | See “Tags” for full definition.  |