SharePoint Presentation for SIAAB Conference

IDOT SharePoint

Inside IDOT

IDOT SharePoint Developers

Dave Heineman
- ➢ SharePoint Developer for 2 years
- ➢ Background in application development, database design/development, and .NET development

Dave Cheley
- ➢ SharePoint Developer for 10 years
- ➢ Background in web development, database design/development, and .NET development

Kerrie Thomas
- ➢ SharePoint Designer/Developer for 10 years
- ➢ Extensive knowledge of SharePoint functionality and capabilities in several versions beginning with WSS 2.0 to 2013 on-premise.
- ➢ Background in web design, web development, project management, business analysis, and user training/documentation

SharePoint

➢ SharePoint helps you organize information, people and projects. SharePoint makes it easy to find answers, discover insights and connect with others.

➢ SharePoint is often used to store and track electronic documents or images of paper documents. It is usually also capable of keeping track of the different versions created by different users. SharePoint also provides the benefit of a central location for storing and collaborating on documents, which can significantly reduce emails and duplicated work in an organization.

➢ According to Microsoft, SharePoint is used by 78% of Fortune 500 companies.

Employee 411

➢ **Business Need:** To provide a single location for all HR / Employee related information.

Employee and Career Services

Leave and Timekeeping

Organization

Payroll and Benefits

Safety and Health

Training and Education

Travel

Employee 411

Employee 411 - Security

> ➤ A user can only see and access the information to which they have been granted permissions.

> ➤ An HR area administrator manages their specific team's information on the site.

Employee 411 – Metadata

➢ Metadata can be defined for a list or library and used as Search criteria

Business Intelligence Portal

➢ **Business Need:** To provide a one-stop-shop for data consumers to access data which has been transformed into intelligent information in order to make well informed and critical business decisions.

Business Intelligence Portal (BI Portal)
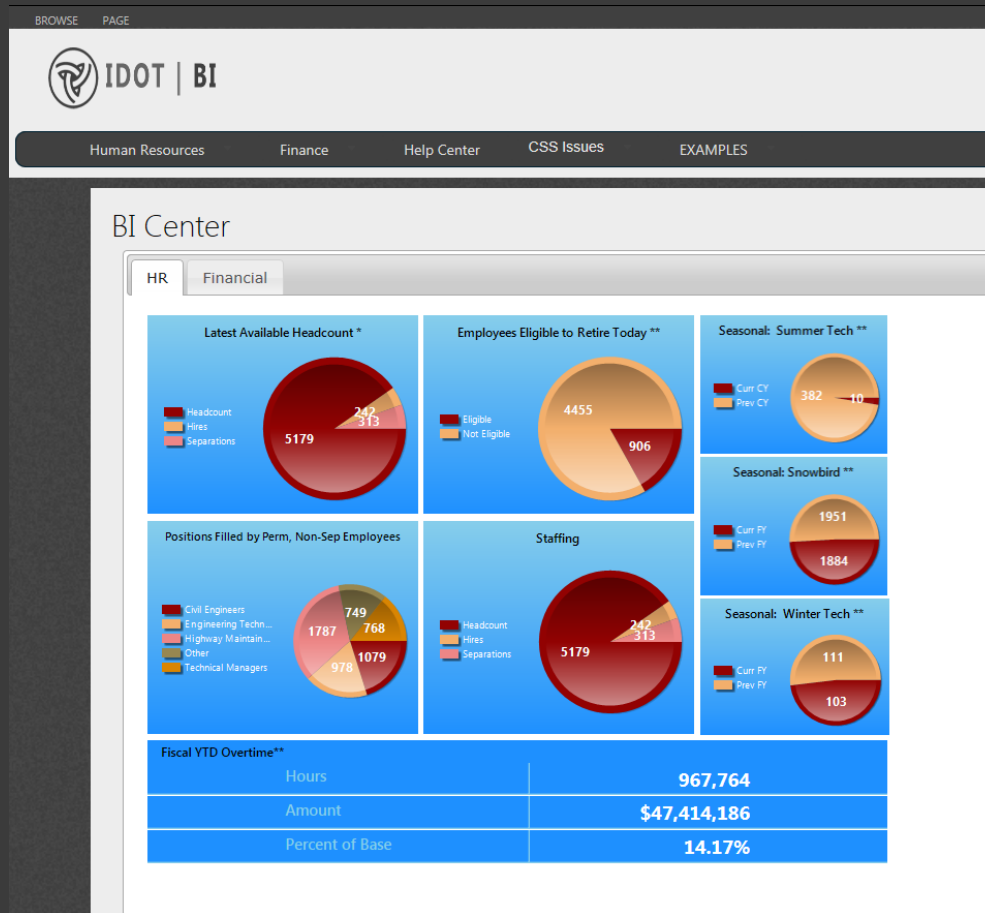
BI Portal – Excel Services

BI Portal - SQL Report Builder

➤ **Set Parameters**

➤ **Run a Report**

BI Portal - PerformancePoint
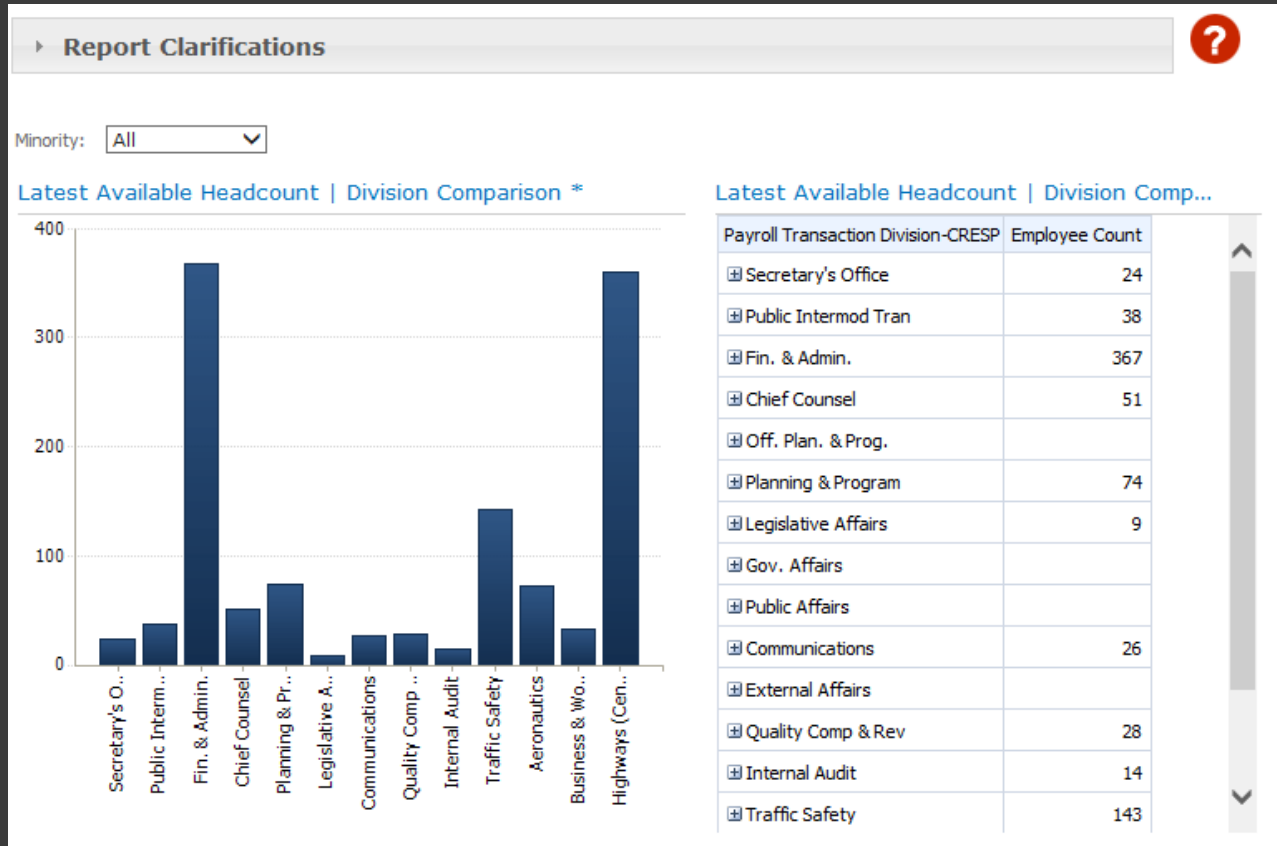
BI Portal

➤ Validation, Versioning, Content Approval, Workflows

DBE Revolving Loan Program

➢ Business Need: To provide a solution that can collect, store and track information and documentation for the program and perform simple calculations on the data for reporting.

DBE Revolving Loan Program

➤ Home Screen View

DBE Revolving Loan Program

➤ Document Set View
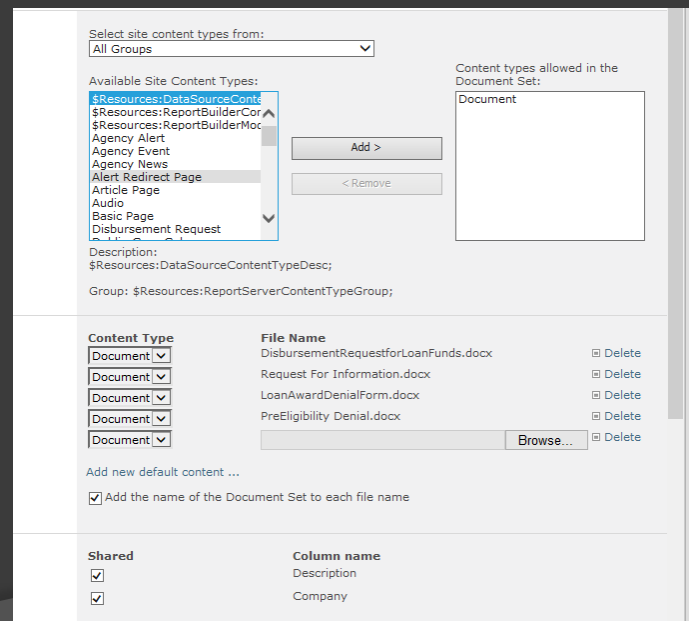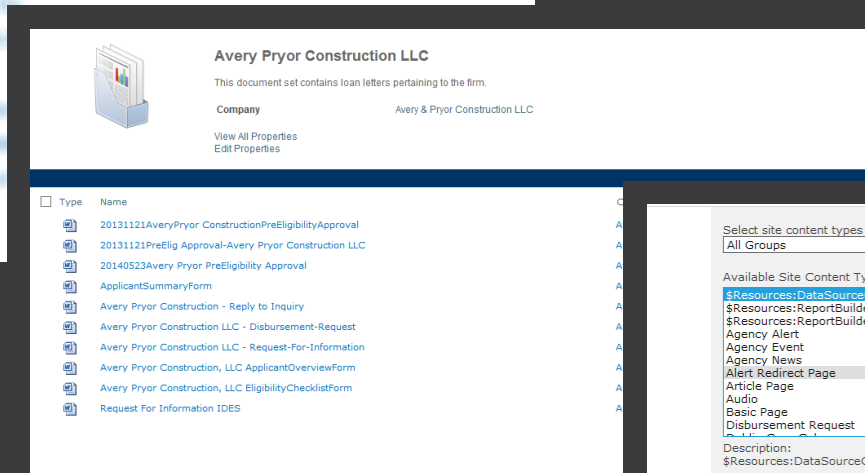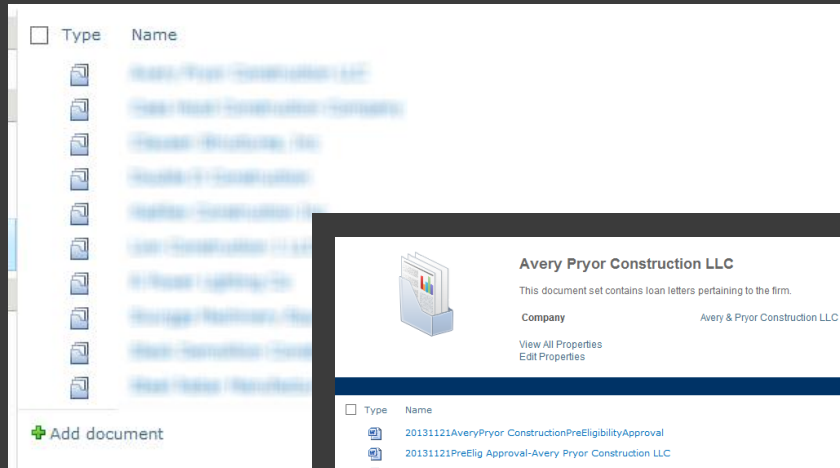
➤ Document Sets are used to group related documentation.

➤ Document templates are auto-generated when a new Document Set is created

DBE Revolving Loan Program
Auto-create Word document

Word documents are auto-generated based on item conditions entered

Information inside the Word document is populated from information within the SharePoint site, such as mailing address

Illinois Department of Transportation
Office of Business & Workforce Diversity
2300 South Dirksen Parkway / Springfield, Illinois 62764

CERTIFIED – RETURN RECEIPT REQUESTED

Dear

Thank you for your interest in the Disadvantaged Business Revolving Loan Program. Based upon the submission of your loan application, required documentation, and the Emergency Administrative Rules established for the Program, we have determined that your loan application is approved for pre-eligibility. Your pre-eligibility is valid for 6 months from the date of this approval notice.

If at any time during your six month pre-eligibility period you are the read low bid contractor, and receive a Notice of Award

DBE Revolving Loan Program

➤ Reports
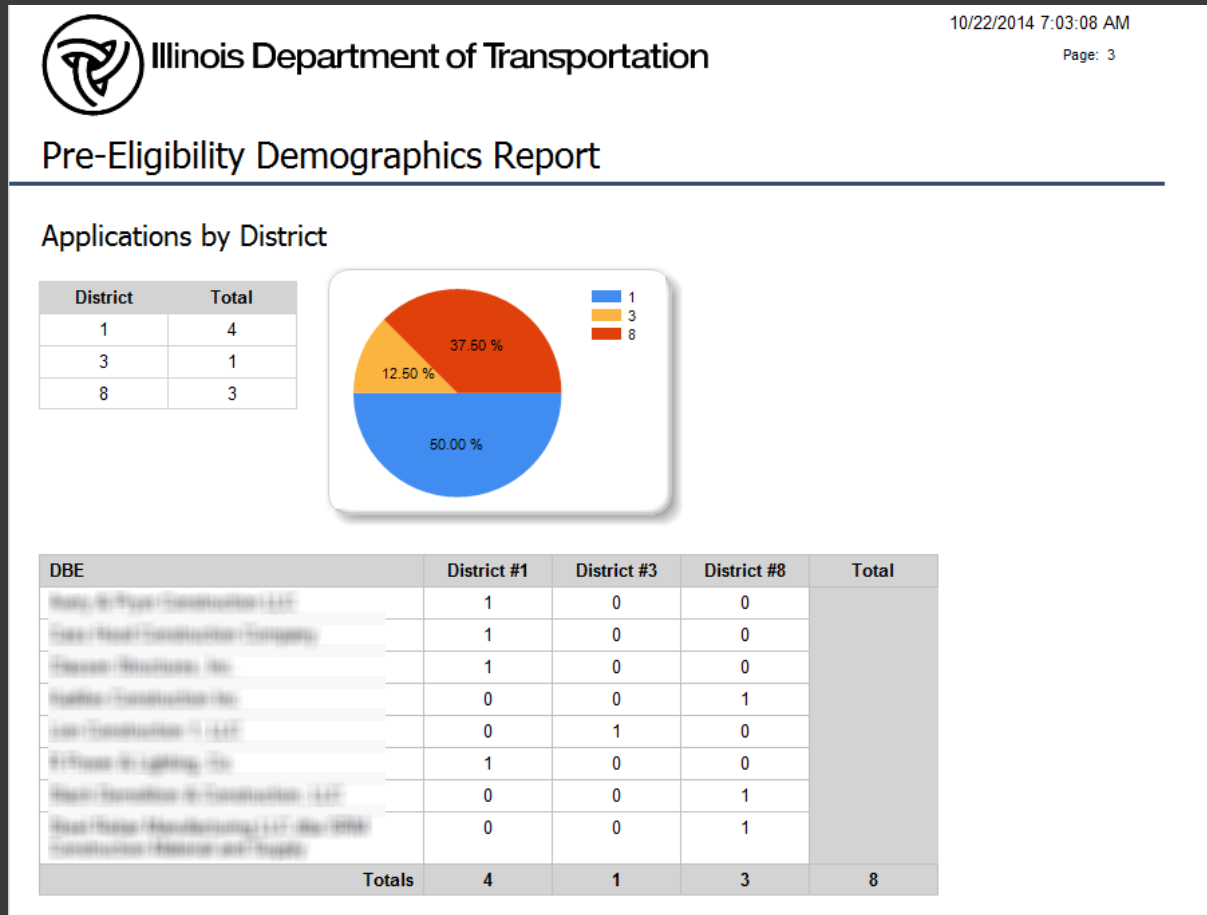
Labor Relations Tracking Site

➤ **Business Need:** To provide a secure means to store, track and find labor related items such as disciplinary and grievance information.

Labor Relations Tracking Site

➢ Labor Relations formerly tracked discipline, grievances, issues, etc. using Microsoft Access which limited end user access to the data

➢ Data is now entered through this SharePoint form which provides secure access to data across the organization

Labor Relations Tracking Site

➤ Data is stored in a SharePoint List

➤ Data can be searched easily using the built-in SharePoint search function

Labor Relations Tracking Site

➢ Data can be extracted and reported when needed

➢ Security features allow access to only those users with approved access rights

Advanced Construction Tracking and Alerts

➤ **Business Need:** To provide a process to format mainframe data and report the information to external users who will provide comments to internal staff.
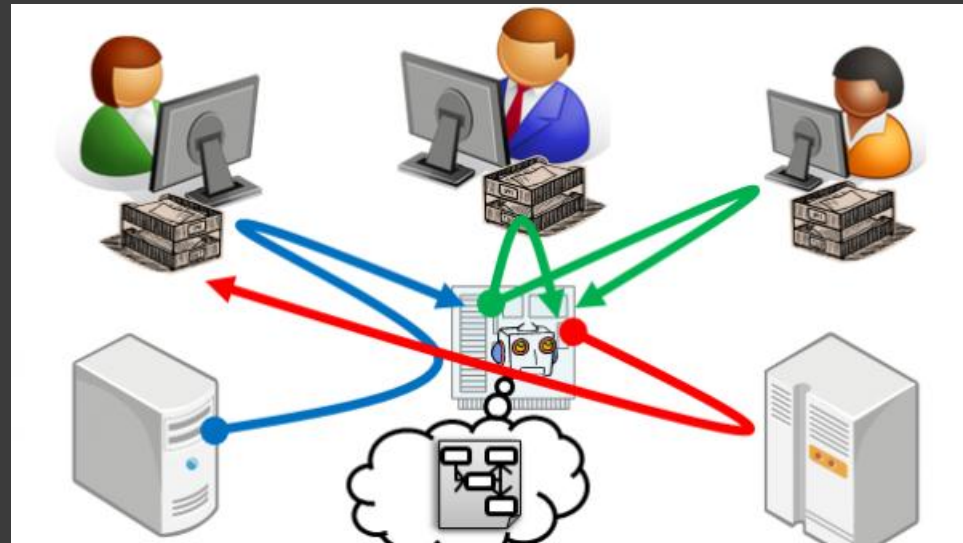
Advanced Construction Tracking & Alerts

➢ Mainframe data is extracted to a flat (text) file
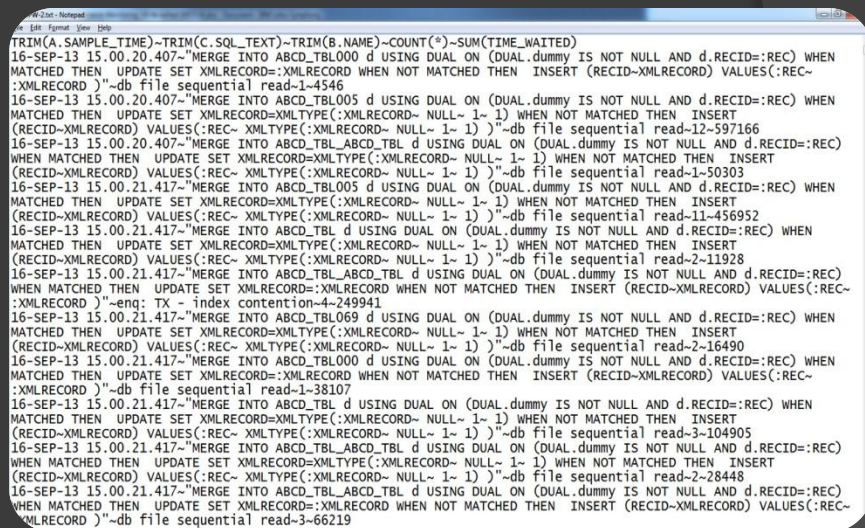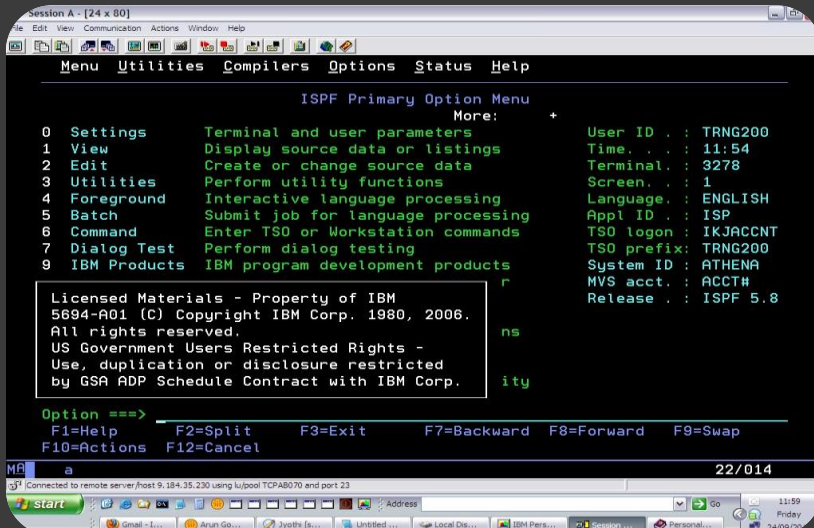
Advanced Construction Tracking & Alerts

➢ Formatted data in SharePoint List

➢ Workflow Process

OP&P Action Survey

Business Need: A single location to report the status of construction projects statewide to ensure they are submitted during the correct reporting period.

OP&P Action Survey

Previously housed and maintained in a single user's spreadsheet

Now items are automatically sent to users by scheduled events

Scheduled Workflows

view the workflow schedules that have been defined on this site.

Quick Links ▾

Edit	List	Item	Workflow	Repeat Sequence
Edit	IDOT Alerts	CheckScanning Quarterly Reminder	Send Email Alert	Every 3 months forever
Edit	IDOT Alerts	IDOTfyi! Monthly Updates	Send Email Alert	Every month forever
Edit	IDOT Alerts	Reminder for State Transportation Plan Action Item Quarterly Reporting	Send Email Alert	Every 6 months forever

OP&P Action Survey

➢ Emails are automatically sent to the appropriate user/staff

From: Heineman, David M
Sent: Tuesday, October 21, 2014 9:51 AM
To: George, Nicole
Subject: State Transportation Plan Action Item Bi-Annual Report

You can change whatever wording.. The link is for his item.

Please complete the survey for the following Action Item by the 31st of this month.
Your answers should be based on the previous six months.

Action Description: Establish a procedure for monitoring the condition and operational status of NHS Intermodal Connectors a
Sub Action Description:
Target Description: Develop a report that includes various available useful data for NHS Intermodal connectors
Target Year: 2014

https://insideidot.portal.illinois.gov/SiteDirectory/OPPAP/Lists/OPPActionAnswers/EditForm.aspx?ID=468

Questions? Please contact, Nicole George at Nicole.George@illinois.gov or 217-785-2752.

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Bureau of Information Processing
Illinois Department of Transportation

OP&P Action Survey

➢ SharePoint allows users to be defined by Security Group and to access only "their" items

OP&P Action Survey

➢ Defined process

```
$('select').change(function()
{
        var newSelection = $("Select[Title='Status']").find('option:selected').text();

    //alert('Hey');
        if(isVerified == false)
            {
                if (newSelection == 'Not Started')
                {
                        //alert('Not Started Func')
                        showNotStartedConditionalRows();
                }

                if (newSelection == 'Ongoing')
                {
                        showOngoingRows();
                }


                if (newSelection == 'In Progress')
                {
                        showInProgressRows();
                }

                if (newSelection == 'Complete')
                {
                        //alert('Complete Func')
                        showCompleteConditionalRows();
                }
            }
});
```

OP&P Action Survey

➤ Administrators have a single point for reviewing data that is shared and controlled by the group

Invoice Processing

Business Need:

➤ Provide a standardized process for the paying of invoices received by the Department in all districts.

➤ Shorten the time from receipt of the invoice to payment to the vendor.

➤ Enhance search and retrieval.

Invoice Processing

Manual Process

➢ Stacks of papers

➢ Manually entered into a system

➢ Filed in a file cabinet
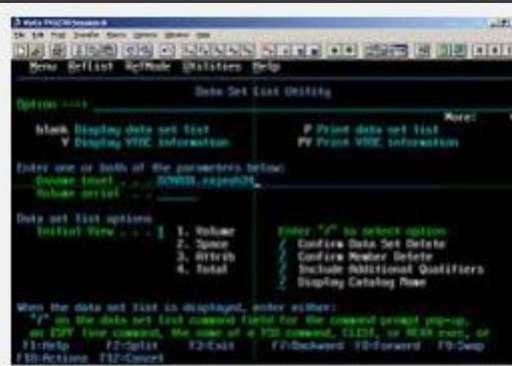
Invoice Processing

Automated Process

➢ Images are scanned

➢ Images are stored on a server with a few metadata tags

Invoice Processing

Workflows

➤ Image is routed appropriately via designed workflows
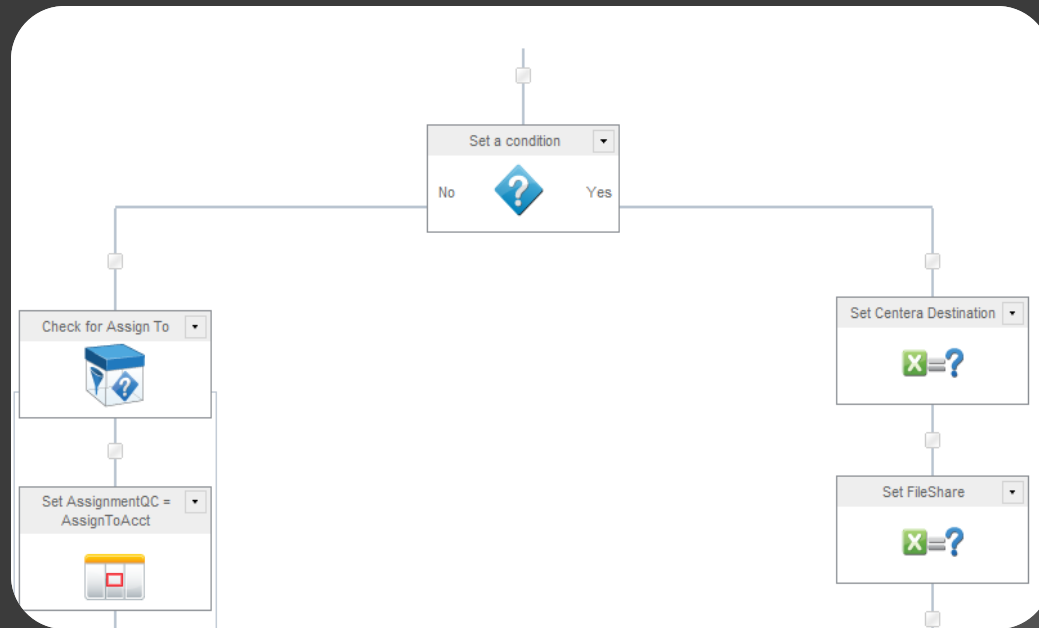
Invoice Processing

- Invoices are entered and paid in a more timely and consistent manner

- Automated match of the invoice with data from the system of record

Invoice Processing

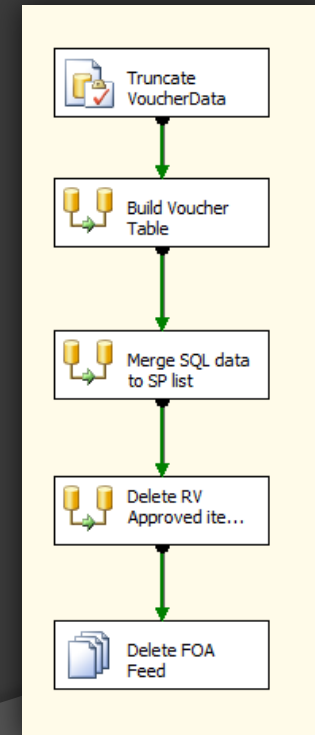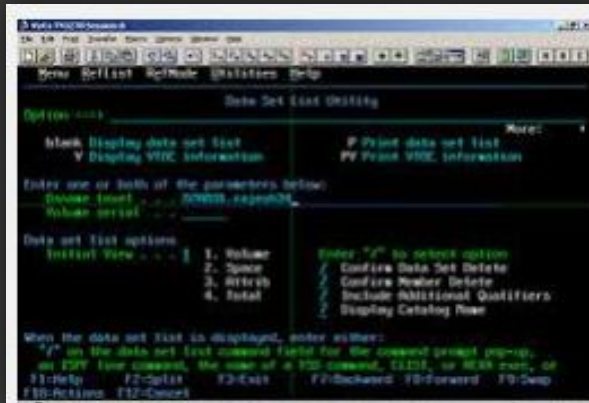➢ Images are now searchable by metadata from the system of record and automatically filed by the appropriate values

Invoice Processing

➤ Images are retained for the specified retention period along with a record of the staff who performed the action, and the date and time the action was performed

ScannedBy	FOAEntry	RVApprover	ScanDate	FOAEntryDate	RVDate
CENTRAL\tisckosme	CENTRAL\lindquistjg	CENTRAL\forbistk	10/7/2014	10/9/2014	10/9/2014
CENTRAL\tisckosme	CENTRAL\lindquistjg	CENTRAL\forbistk	10/7/2014	10/9/2014	10/9/2014
CENTRAL\tisckosme	CENTRAL\lindquistjg	CENTRAL\forbistk	10/6/2014	10/9/2014	10/9/2014

Inside

Questions or Comments?

For additional information on IDOT SharePoint initiatives, please contact:

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