Essential Ways to Make SharePoint Work for You

2015 SLA-PHT Division Spring Meeting

April 20, 2015

Greg Cohee
Partner, Pharmica Consulting

PHARMICA CONSULTING | Get Better

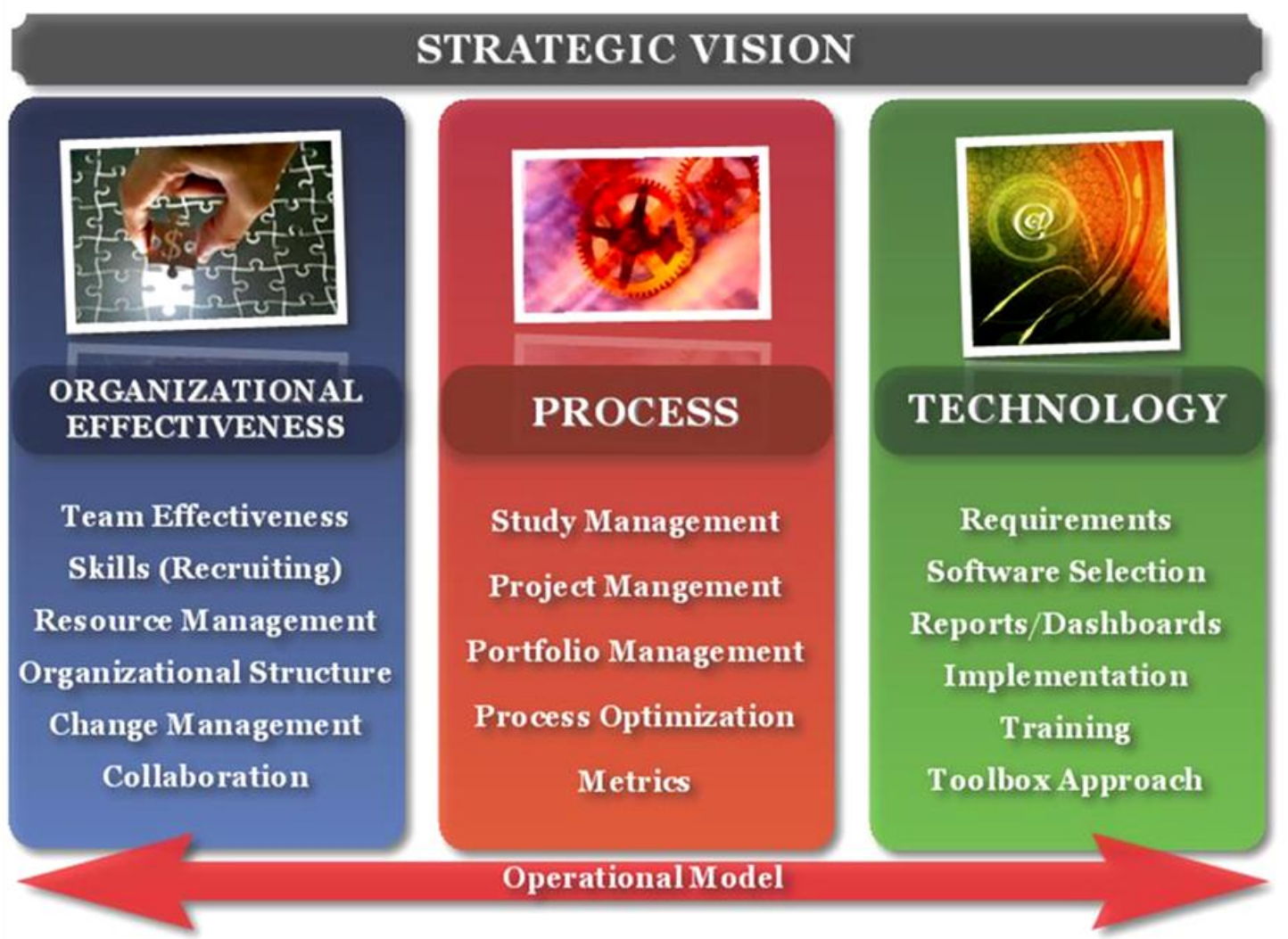
"Technology provides no benefits of its own; it is the application of the technology to business opportunities that produces ROI."

Robert McDowell

Author, 'In Search of Business Value'

How can we make SharePoint work for you?

PHARMICA Consulting



- Focus: Exclusively on the life science industry
- Expertise: R&D Operational Excellence
- Know How: Pharmaceutical drug development processes, systems, data, project management, regulations, & collaboration
- Goal: Improving efficiency & enabling faster, better decisions

PHARMICA'S SHAREPOINT CONFERENCE
FOR THE LIFE SCIENCES INDUSTRY
SEPTEMBER 30TH - OCTOBER 1ST, 2014
REGISTER NOW
Microsoft SharePoint
Bristol-Myers Squibb Company
Johnson & Johnson
Pfizer
biogen idec
MILLENNIUM
Takeda
sanofi aventis
Daiichi-Sankyo
Genentech
CHILTERN
WEST Pharmaceutical Services
MERCK
Abbott
A Promise for Life
astellas
Leading Light for Life
Medtronic
Otsuka
AstraZeneca
Boehringer Ingelheim
BAYER
NOVARTIS
PURDUE
COVANCE
THE DEVELOPMENT SERVICES COMPANY
TEVA
gsk
SUCAMPO
PHARMACEUTICALS, INC.
novo nordisk
ENDO
PHARMACEUTICALS
Forest Laboratories, Inc.
Shire
AMYLIN

Dynamic Workplace

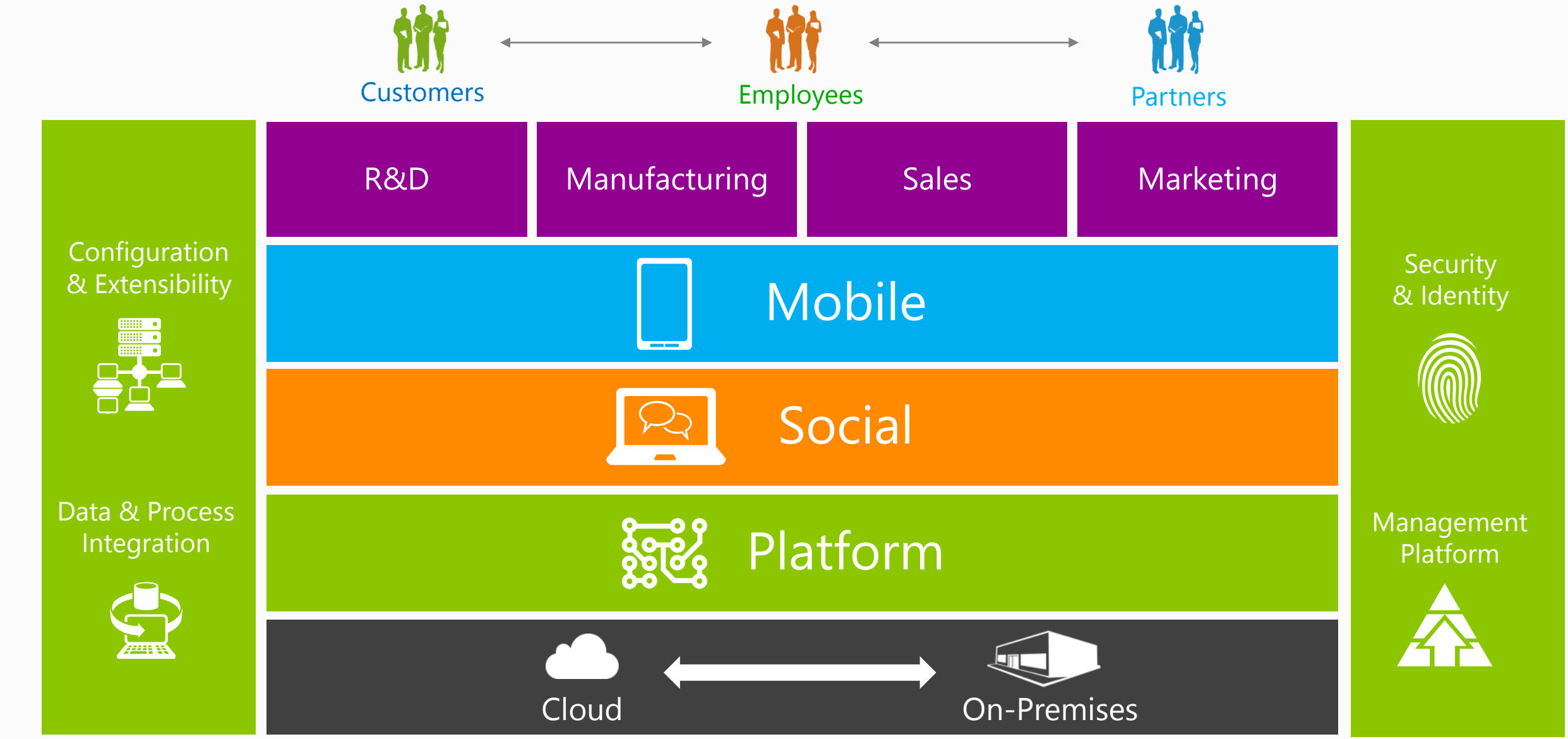
Device Explosion

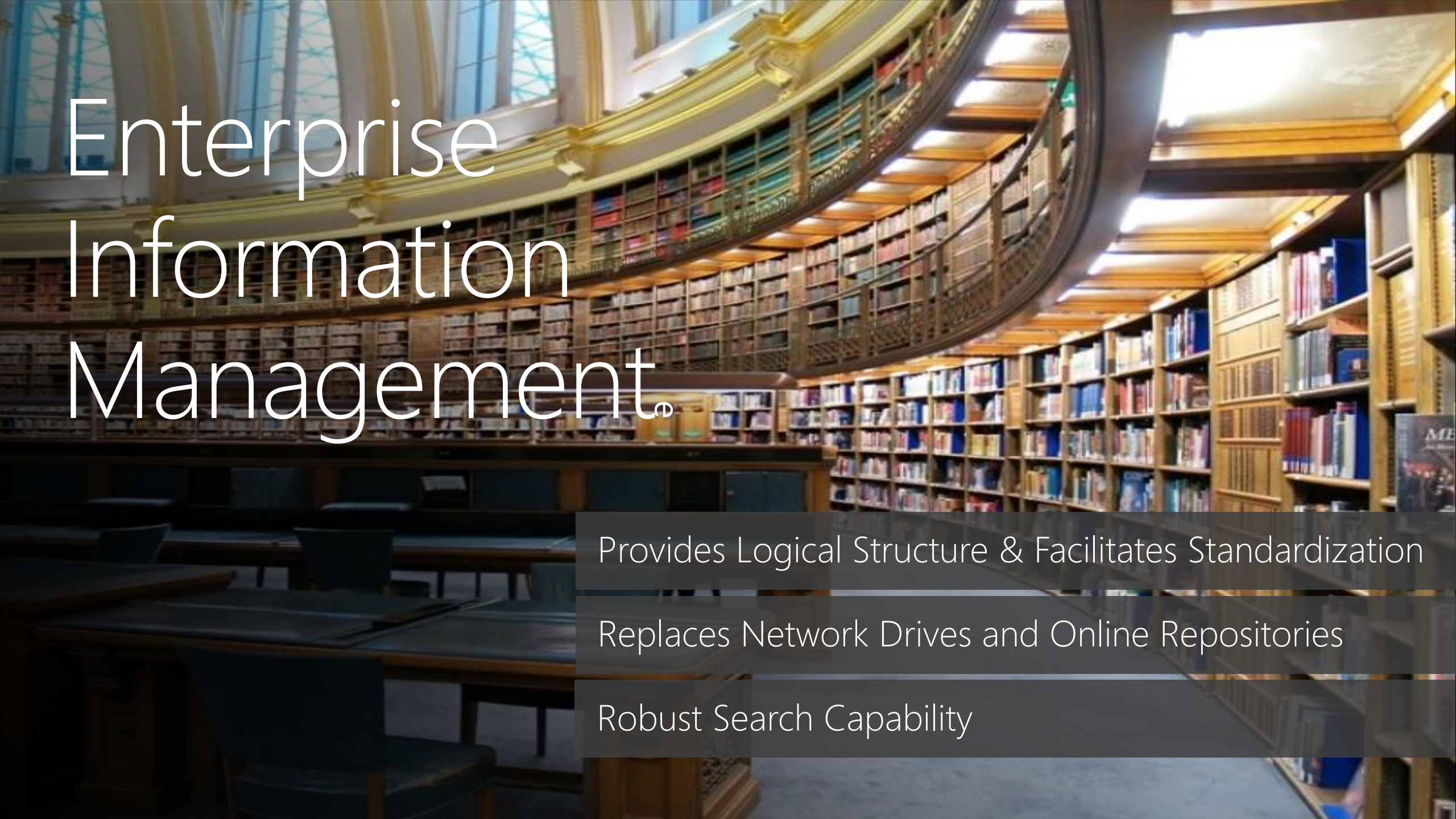
The Modern Workplace

Global Organizations

Secure Access & Compliance

SharePoint: An End-to-end Solution Platform

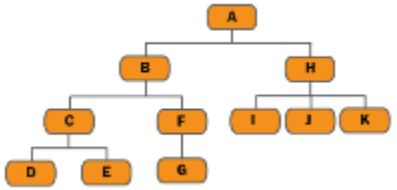




Enterprise Information Management

- Provides Logical Structure & Facilitates Standardization
- Replaces Network Drives and Online Repositories
- Robust Search Capability

Improving Information Architecture = Improving Findability



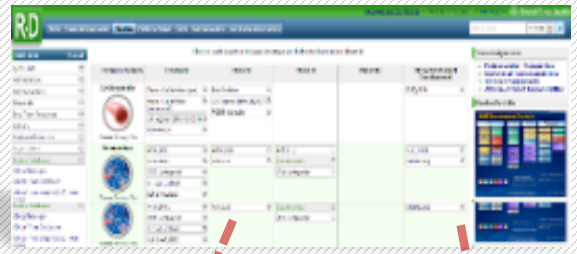
Classification & Hierarchy

Labeling & Tagging

Navigation & Wayfinding

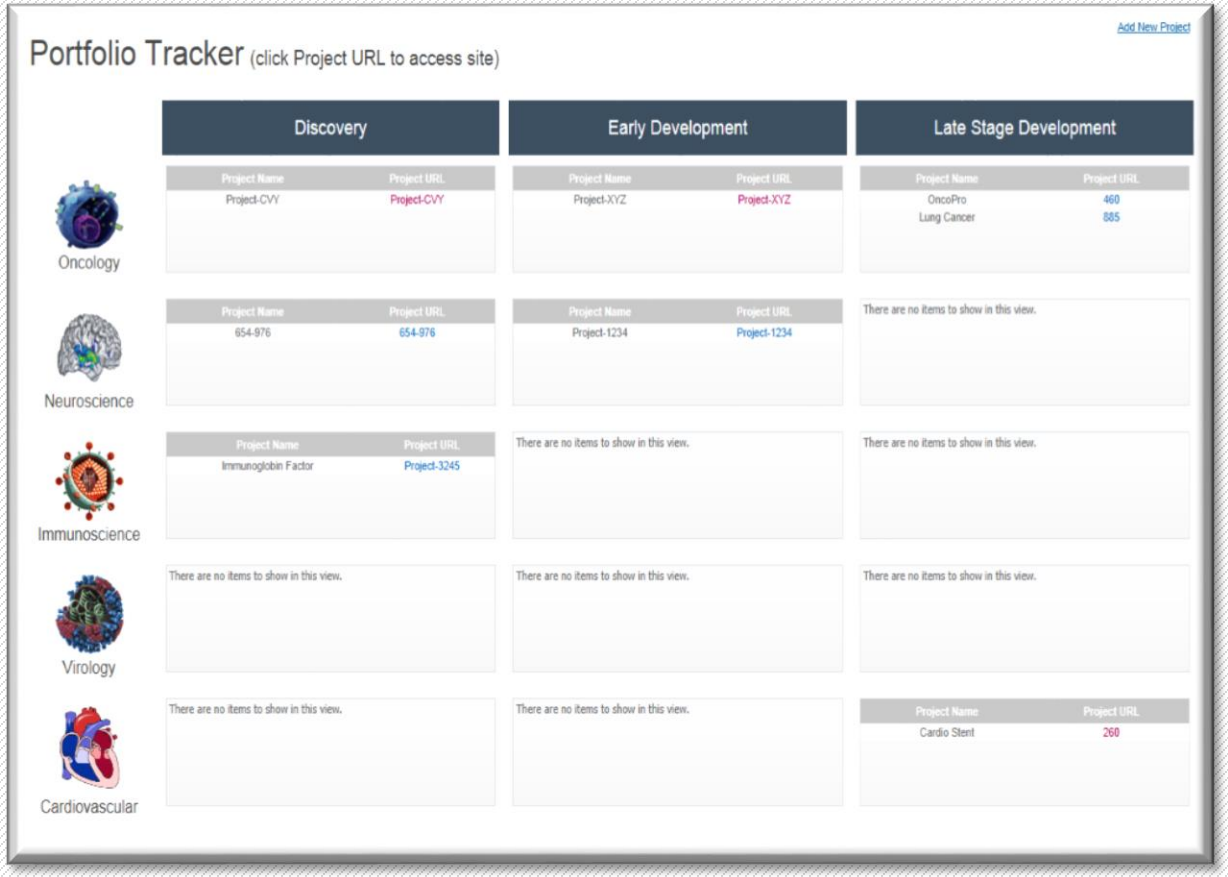
Search

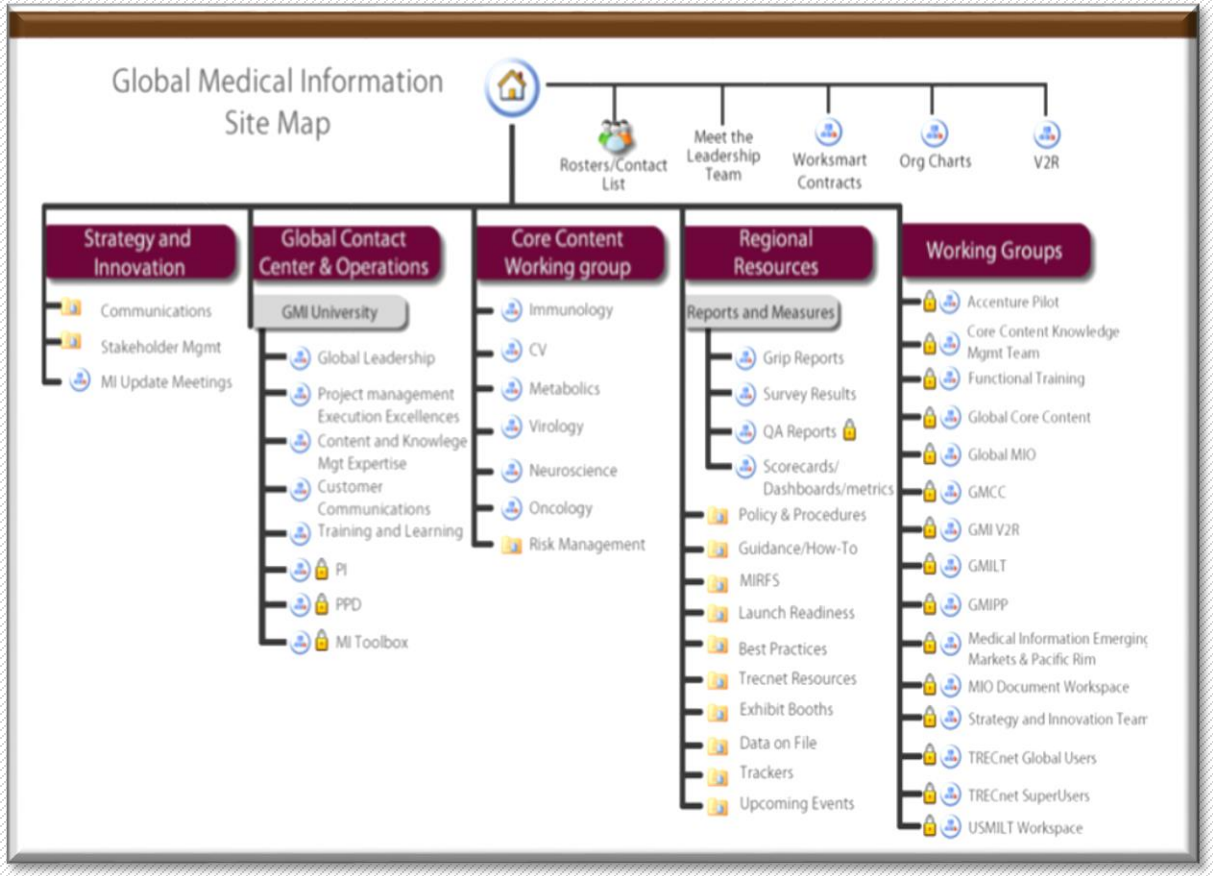
Logical Hierarchies



- Creating a formal Information Architecture is critical
- Information should reflect your Business or Process
- Using Templates provides a consistent layout & look/Feel
- Appling visual queues will help differentiate areas

Use Navigation Aids to Surface Content





Improving Findability with Search

Search scopes

- Pre-filter data set results based on set location: instead of searching “All Sites”
- SharePoint Search can also be configured to Index external repositories

Build and implement a new custom ranking model

- You decide what weight to give properties
- Can apply to entire farm, or single site

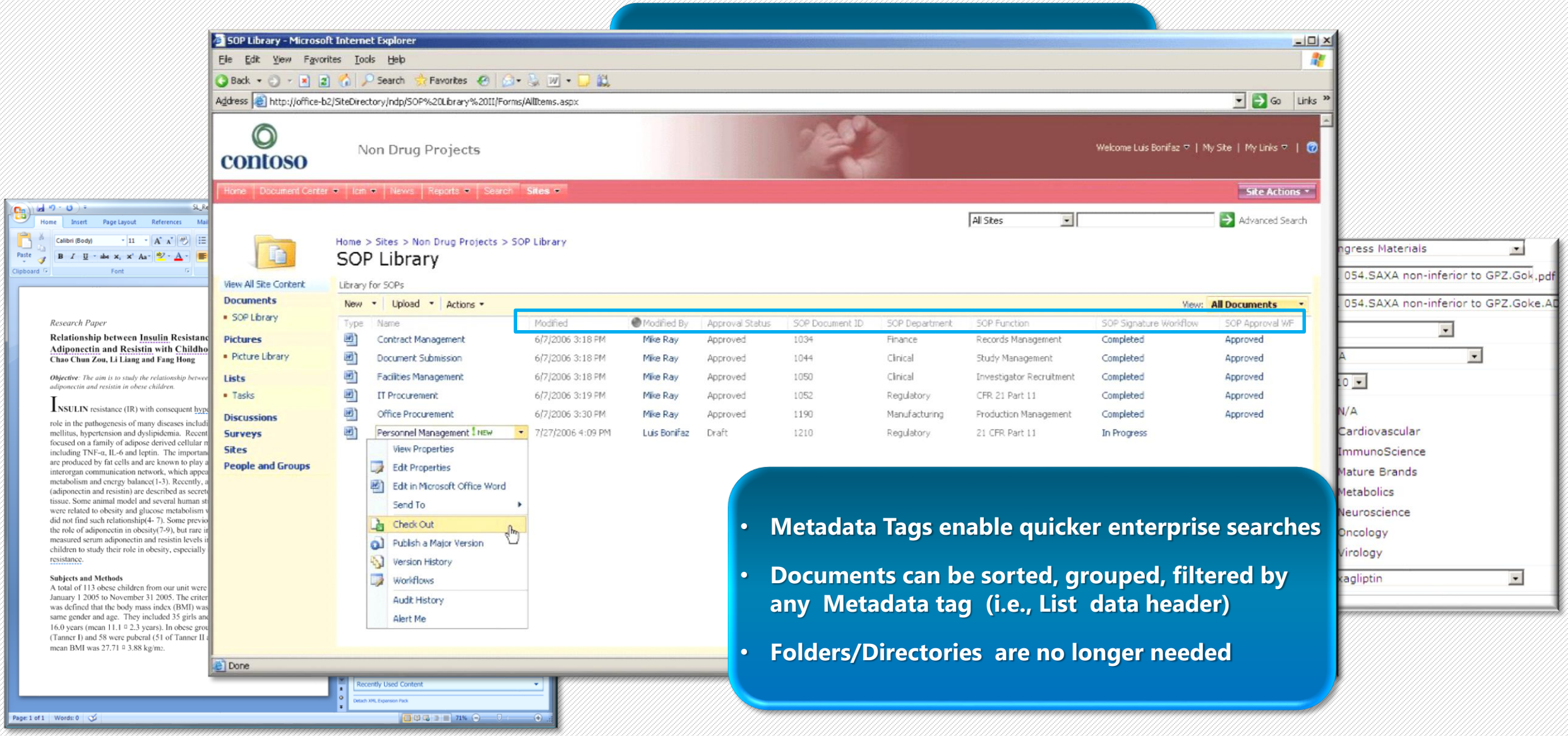
Use keywords, synonyms, and best bets to provide a relevant set of search results for popular search terms

- Defined Keywords are used to present a user with a definition and and/or predefined “best bet” links
- Synonyms are useful when several search terms are used for the same concept and content
- Use Site Collection Web Analytics Reports to help you plan keywords, synonyms, and Best Bets

Plan for iFilters

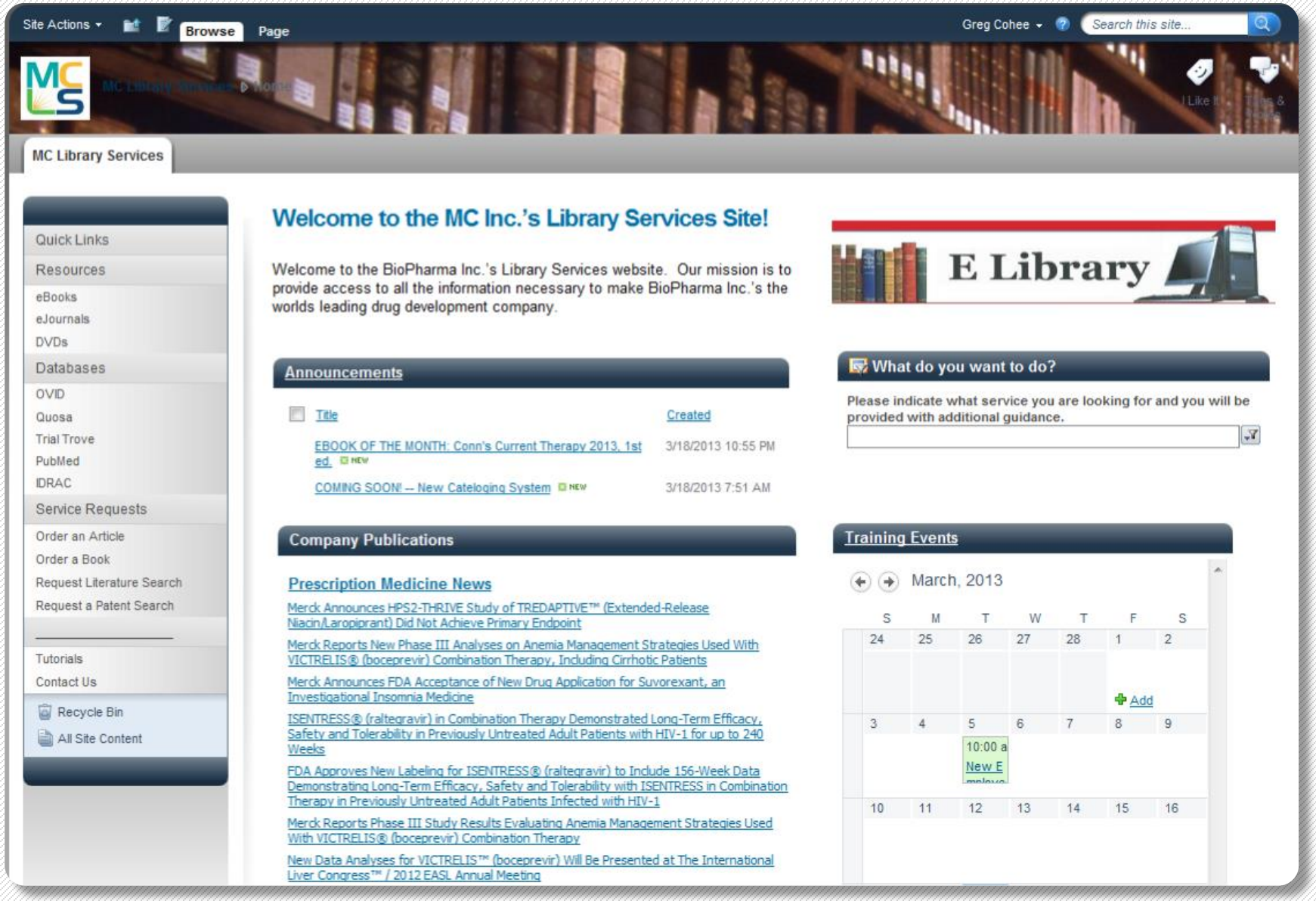
- iFilters used to read individual file types (what’s inside) when it crawls content

The Importance of Taxonomies & Metadata



- **Metadata Tags enable quicker enterprise searches**
- **Documents can be sorted, grouped, filtered by any Metadata tag (i.e., List data header)**
- **Folders/Directories are no longer needed**

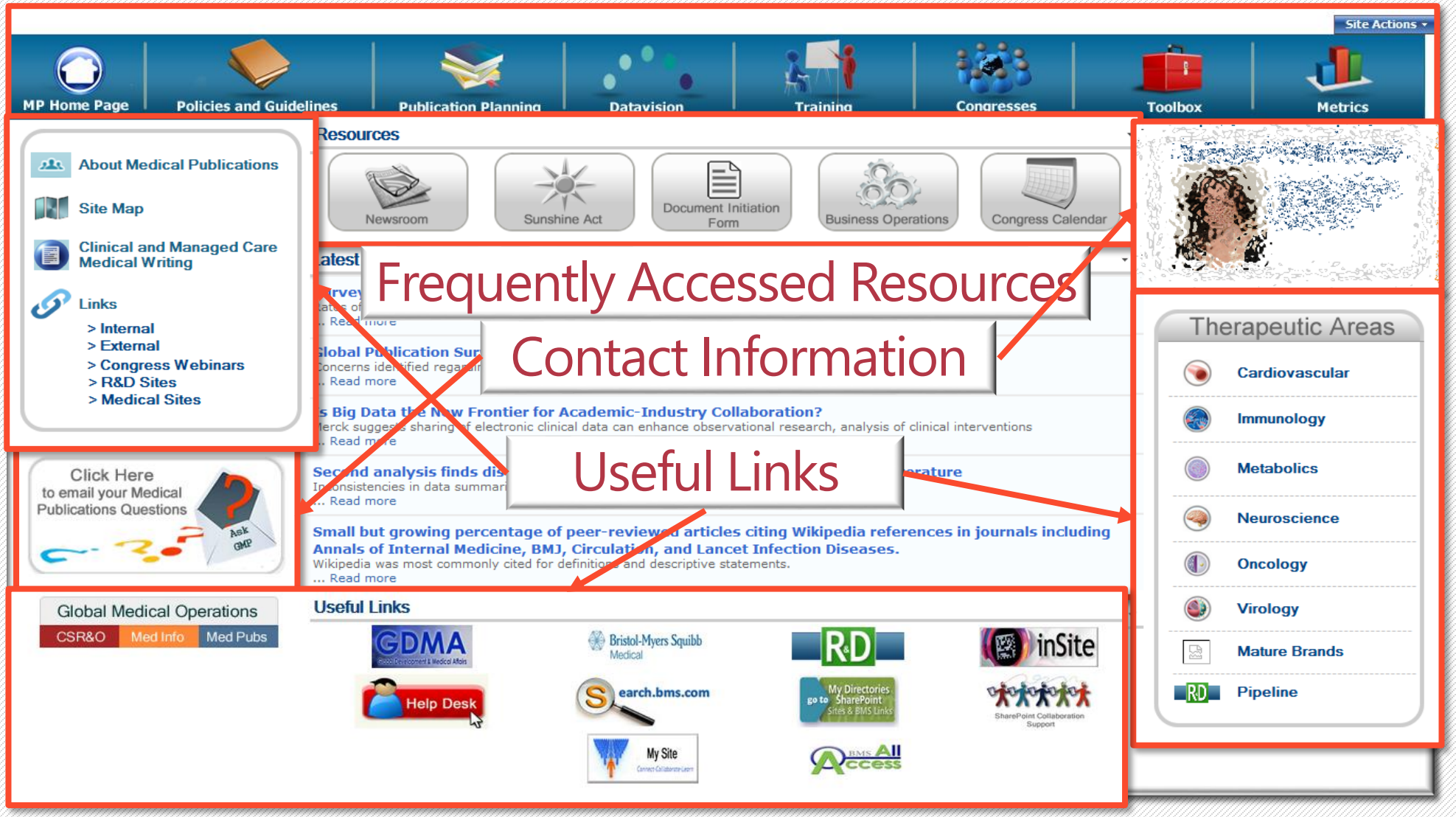
Customize Sites & Workspaces



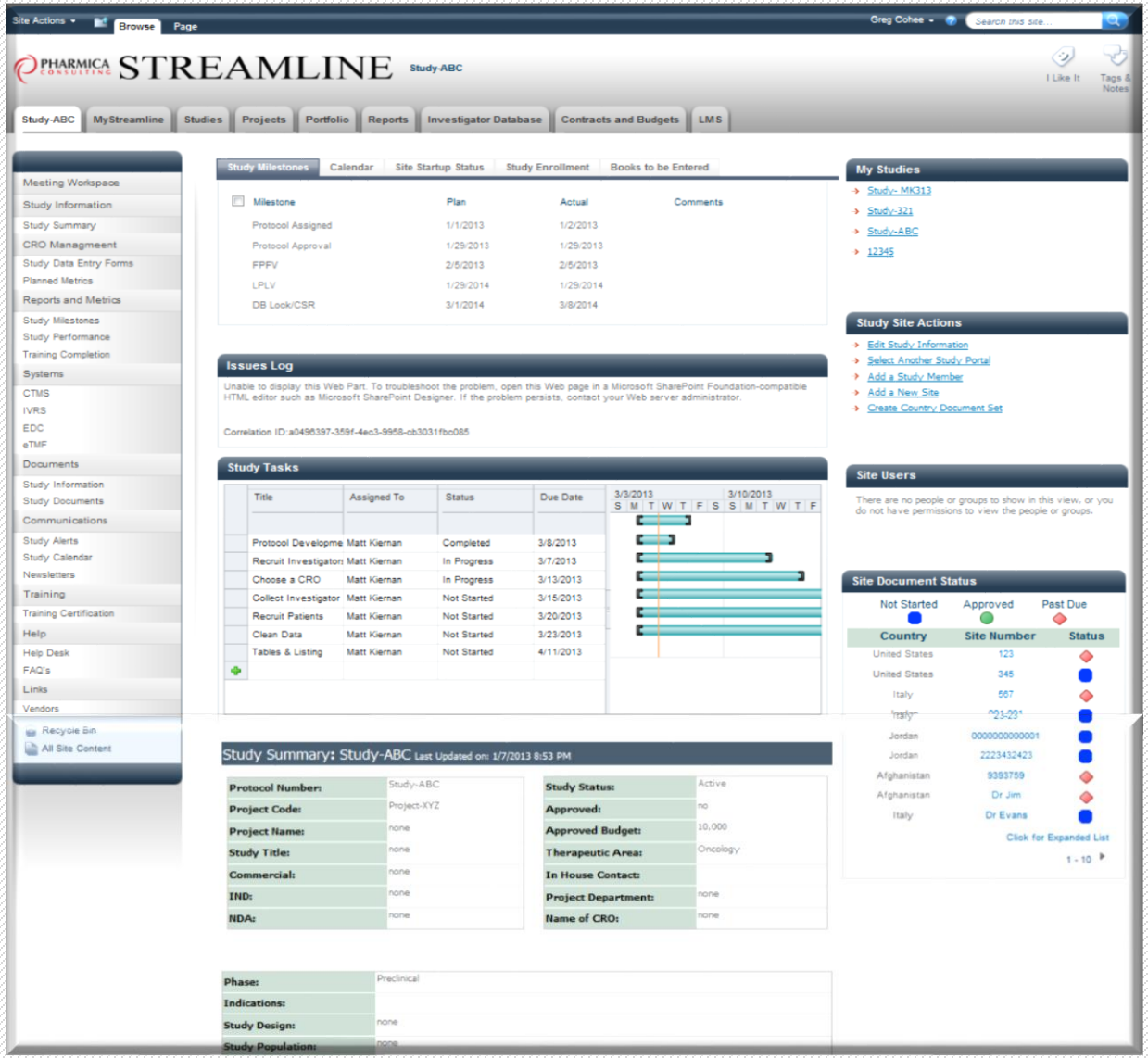
Things to Think about:

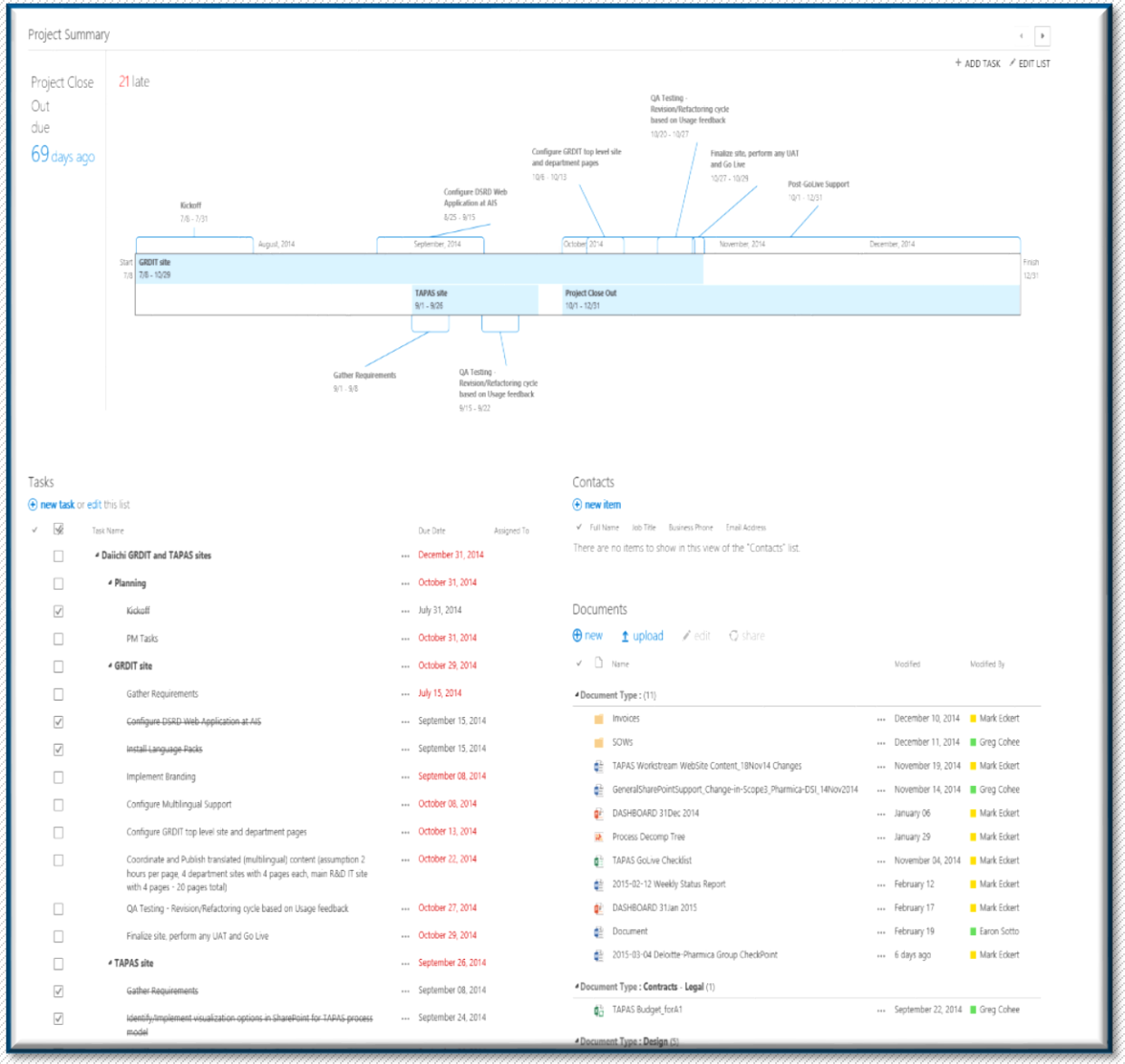
- Determine how you work
- Evaluate where your time is spent
- What do Visitors Need?
- What are the Pain Points?
- Look for Repetitive Tasks
- Excel Spreadsheets & Shared Documents

Consistent & Intuitive Site Designs

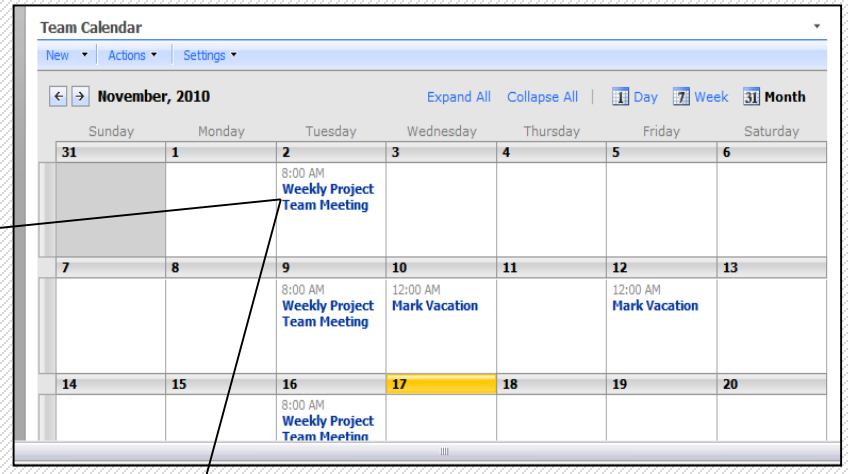


Use Team Collaboration Sites to Drive Adoption & Efficiency





Use Meeting & Document Workspaces



Collaboration Team Meetings

Subject: R&D Collaboration Services Team Status Meeting
Date: 10/28/2010 **Time:** 11:00 AM - 12:00 PM >>
Location: LVL D2.268 / HPW 8TS203 / 1.866.217.3840 Code 609 252 5435

Home

Meeting workspace for the R&D Collaboration Project Team

Select a date from the list below:

- 9/16/2010
- 9/23/2010
- 9/30/2010
- 10/7/2010
- 10/14/2010
- 10/21/2010
- 10/28/2010
- 11/4/2010
- 11/11/2010
- 11/18/2010
- 12/2/2010
- 12/9/2010
- 12/16/2010
- 12/23/2010
- 12/30/2010

Previous Next

Meeting Summary

Collaboration in Action Plan

- Suggestion: make communications short blurbs and not long articles
- Length will depend on type of message but in general keep messages short
- Anne to reach out to RD collab team to collect ideas for messages and add to plan

SOP Highly Confidential

- What's going on with the SOP?
- Anne follow up with records management
  - Sylvia, Jim Bestale
- BPPD Execution Team- in tech ops,

Action Items - (Series Items)

Status	Title	Assigned To	Start Date	% Complete
Not Started	KD Progress Report Out		9/2/2010	

Add new item

Proposed Agenda Topic Tracker - (Series Items)

Title	Owner	Priority	Created
Collaboration Exchange overview / site demo	Spina, Frank	(3) Low	11/10/2010 1:28 PM
Update on workflow issue	Kloss, John	(3) Low	9/2/2010 11:02 AM

Add new item

Agenda

Subject	Owner	Time
Security Audit	Kandee	5 Minutes
SP Conference	Matt	5 Minutes
SOP highly confidential info	Kandee	10 Minutes
Short blurbs RD Collab in Action	Kandee	10 Minutes

Add new item

Meeting Decks

Type | Name | Modified By

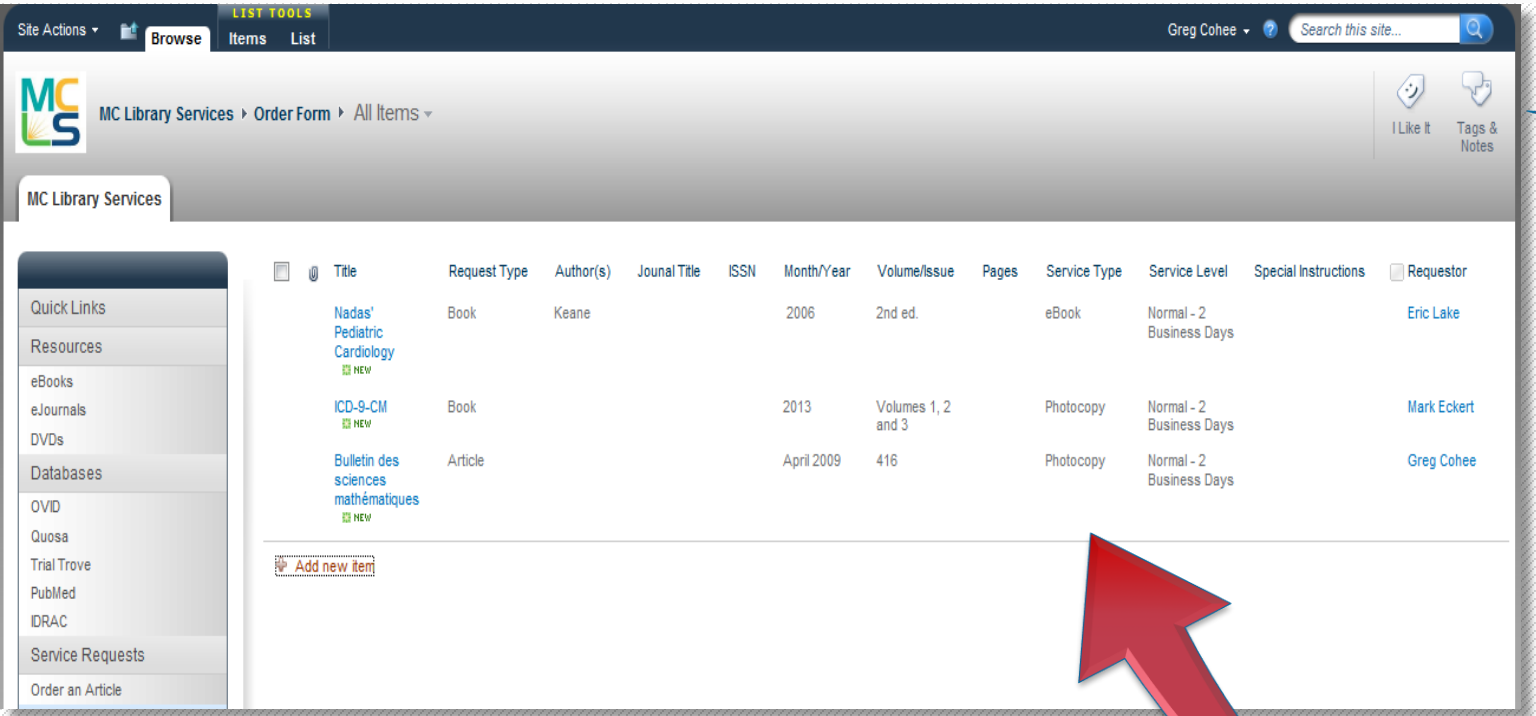
There are no items to show in this view of the "Meeting Decks" document library. To create a new item, click "Add new document" below.

Add new document

Attendees

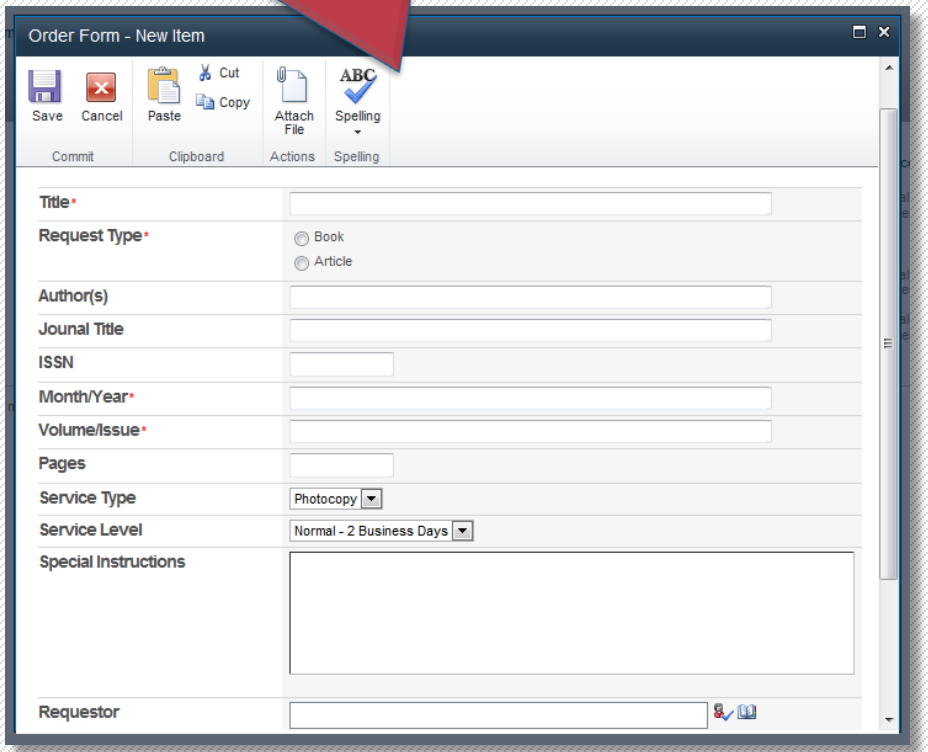
Name	Edit	Response
Bjornberg, Kaela		None
Dowling-Grindle, Megan		None
Funt, Craig		None
Grubb, Andy		None
Kiernan, Matt		Accepted
Kloss, John		None
Lagrotta, Nicholas		None

Capture Data…Don't Re-enter Data



1. Create a list of data items you want to capture

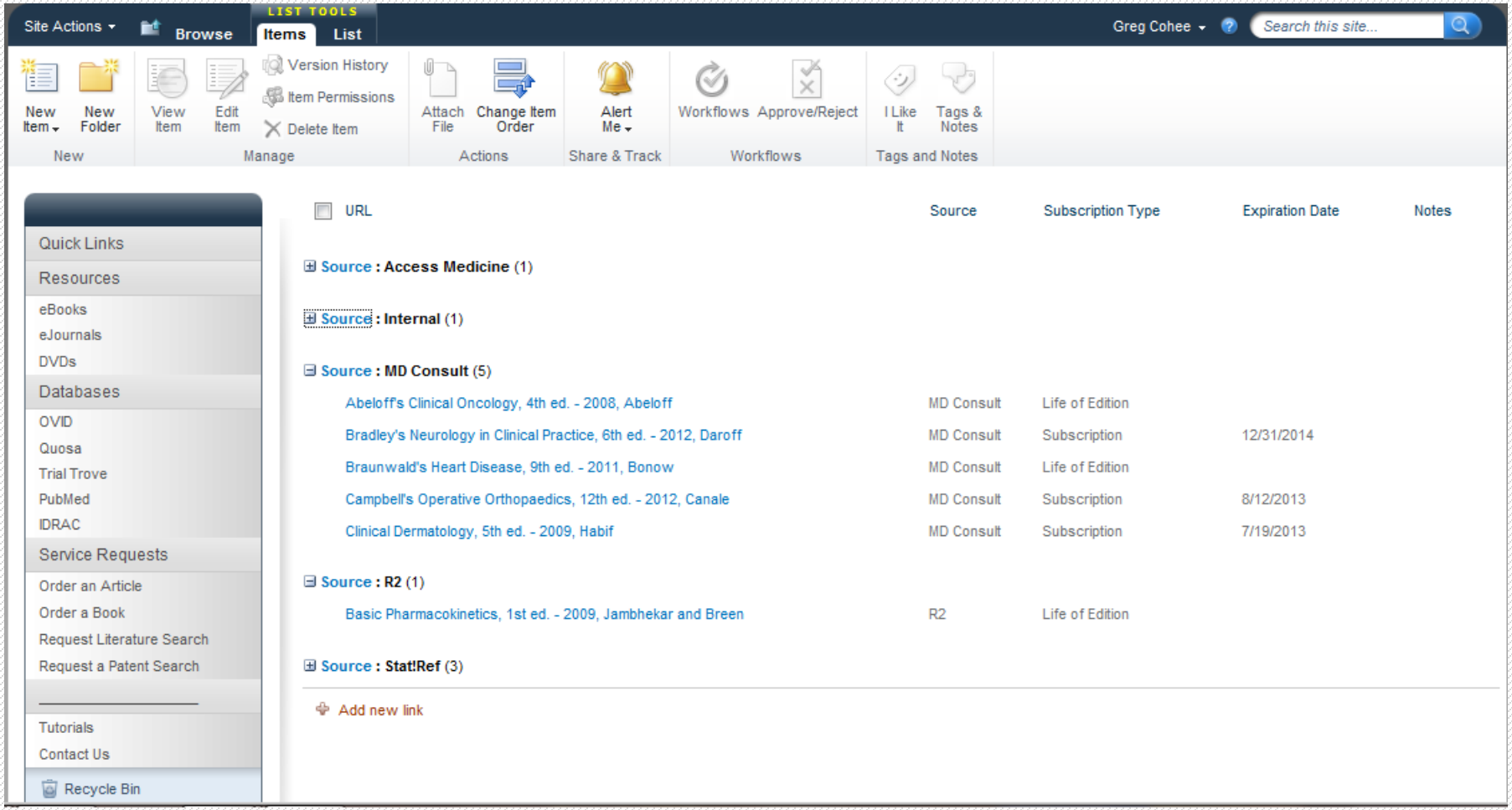
2. SharePoint automatically creates the Data Entry Form



3. Edit Checks ensure data is entered correctly

4. Data is automatically entered into SharePoint list

Manage List Data

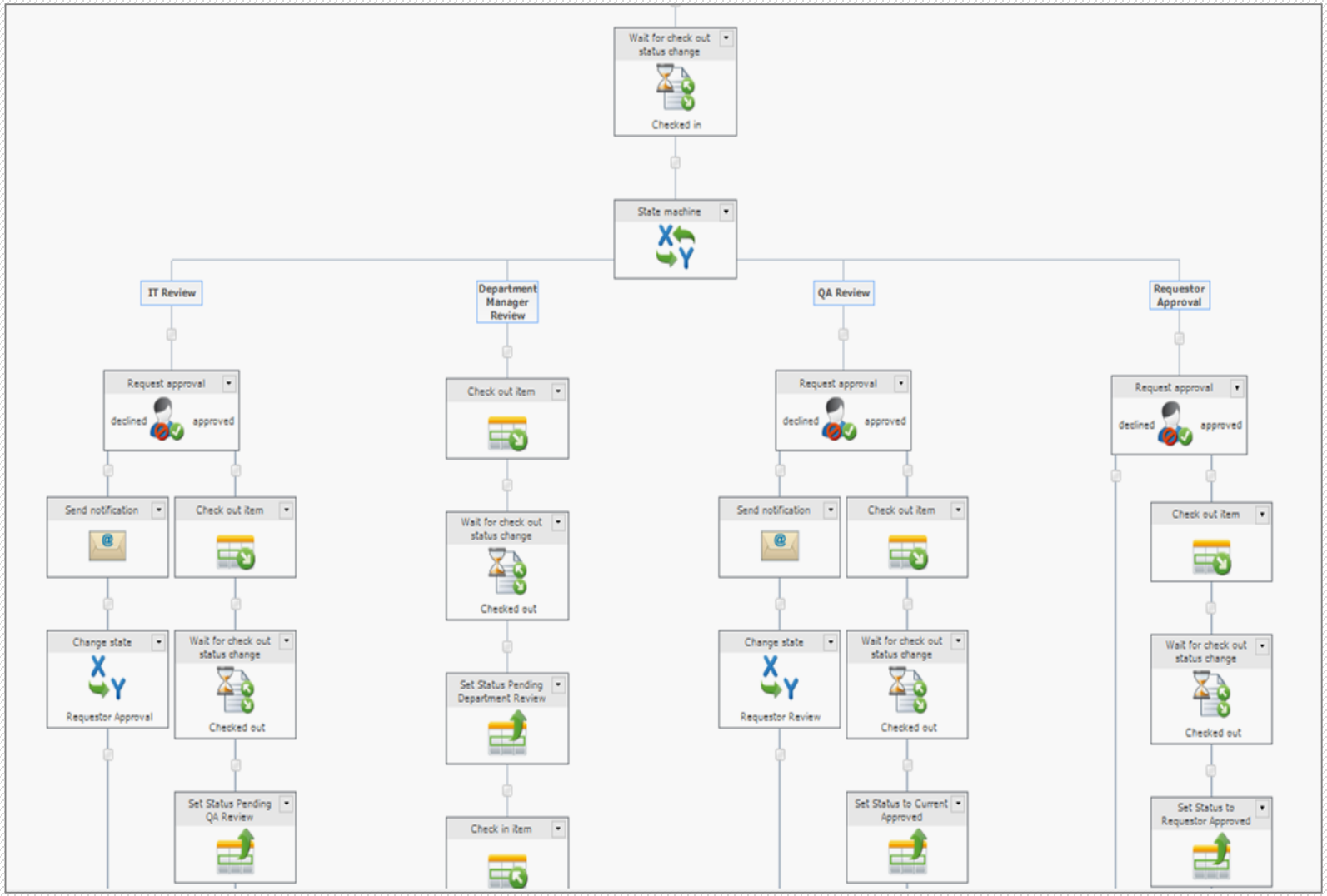


List Data (and Documents) can be:

- Sorted
- Filtered
- Grouped
- Counted
- Summed

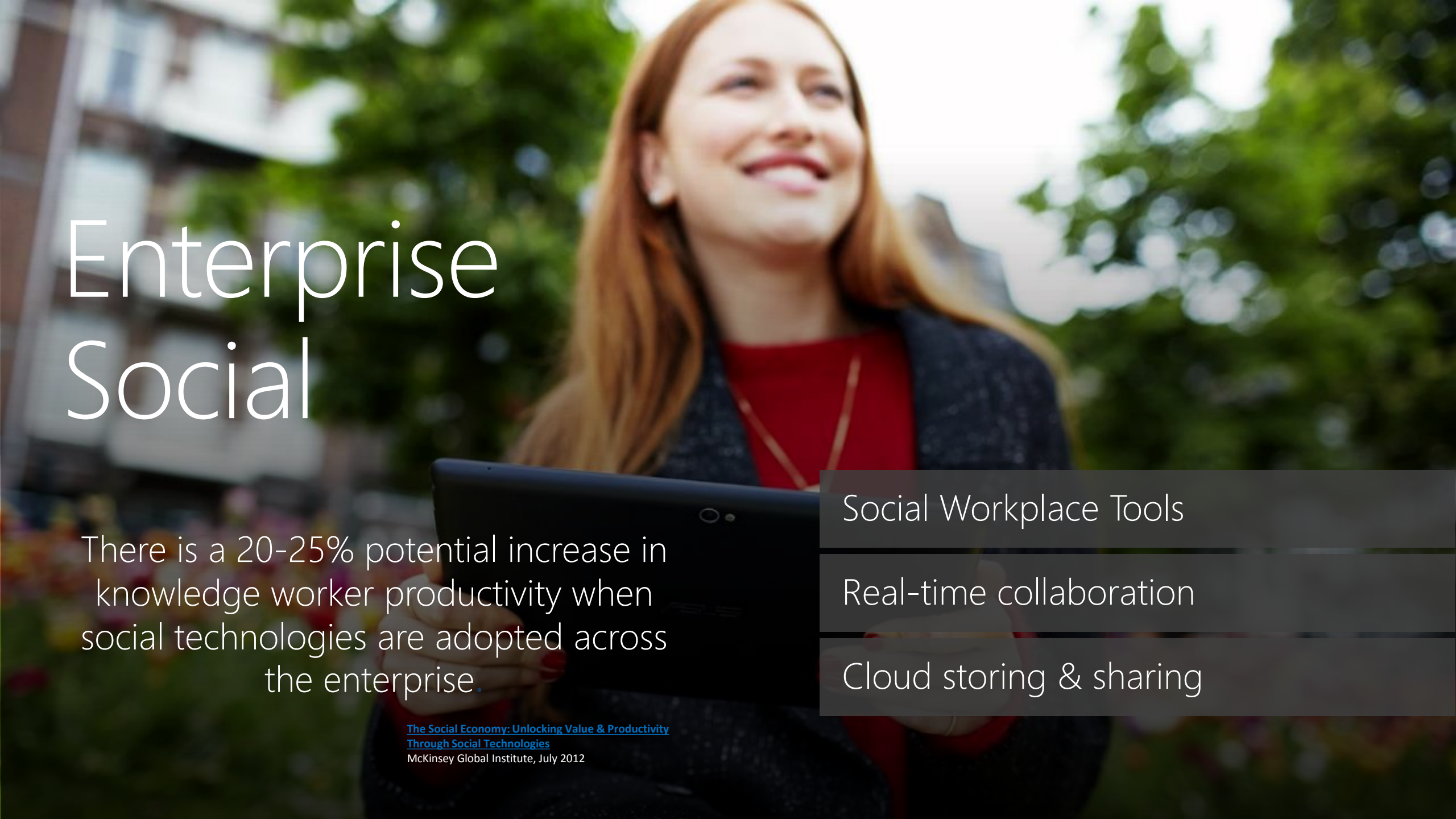
Then, save custom Views

Leverage Workflows



Use Workflows to automate business processes:

- Alerts
- Document Routing
- Approvals
- Expiration Reminders
- Data Flagging
- Move/Pull Data



Enterprise Social

There is a 20-25% potential increase in knowledge worker productivity when social technologies are adopted across the enterprise.

[The Social Economy: Unlocking Value & Productivity Through Social Technologies]
McKinsey Global Institute, July 2012

- Social Workplace Tools
- Real-time collaboration
- Cloud storing & sharing

Targeted Communications

All
Business Units

Depend on Pfizer World

99.99%
Uptime

PfizerWorld always available

58
Million

Page Views in 2013

More than
151,000

Colleagues, Contractors & Partners around the world use Pfizer World

89,000

Connections in MyWorld, with 76k messages shared

100+

Communities in PfizerWorld. All divisions represented.

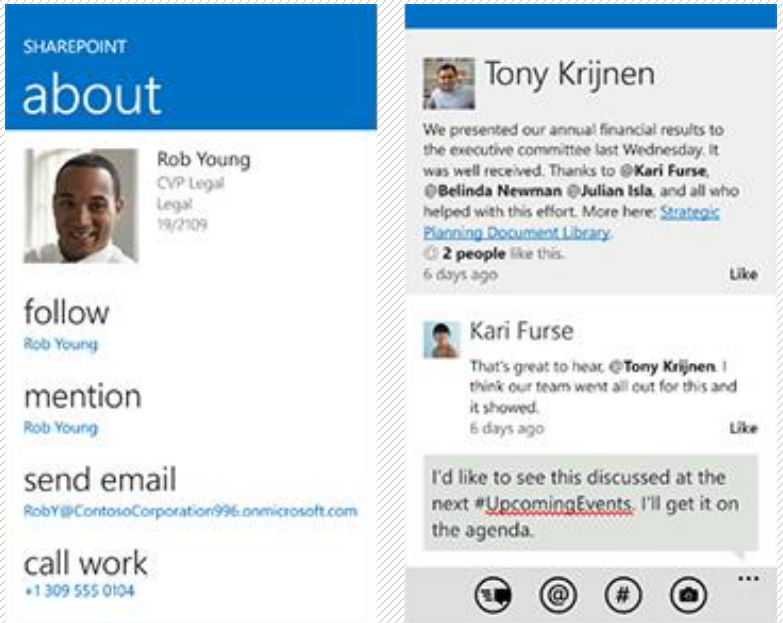
Social Media Tools

Video Clips

Discussion Forums

Boss

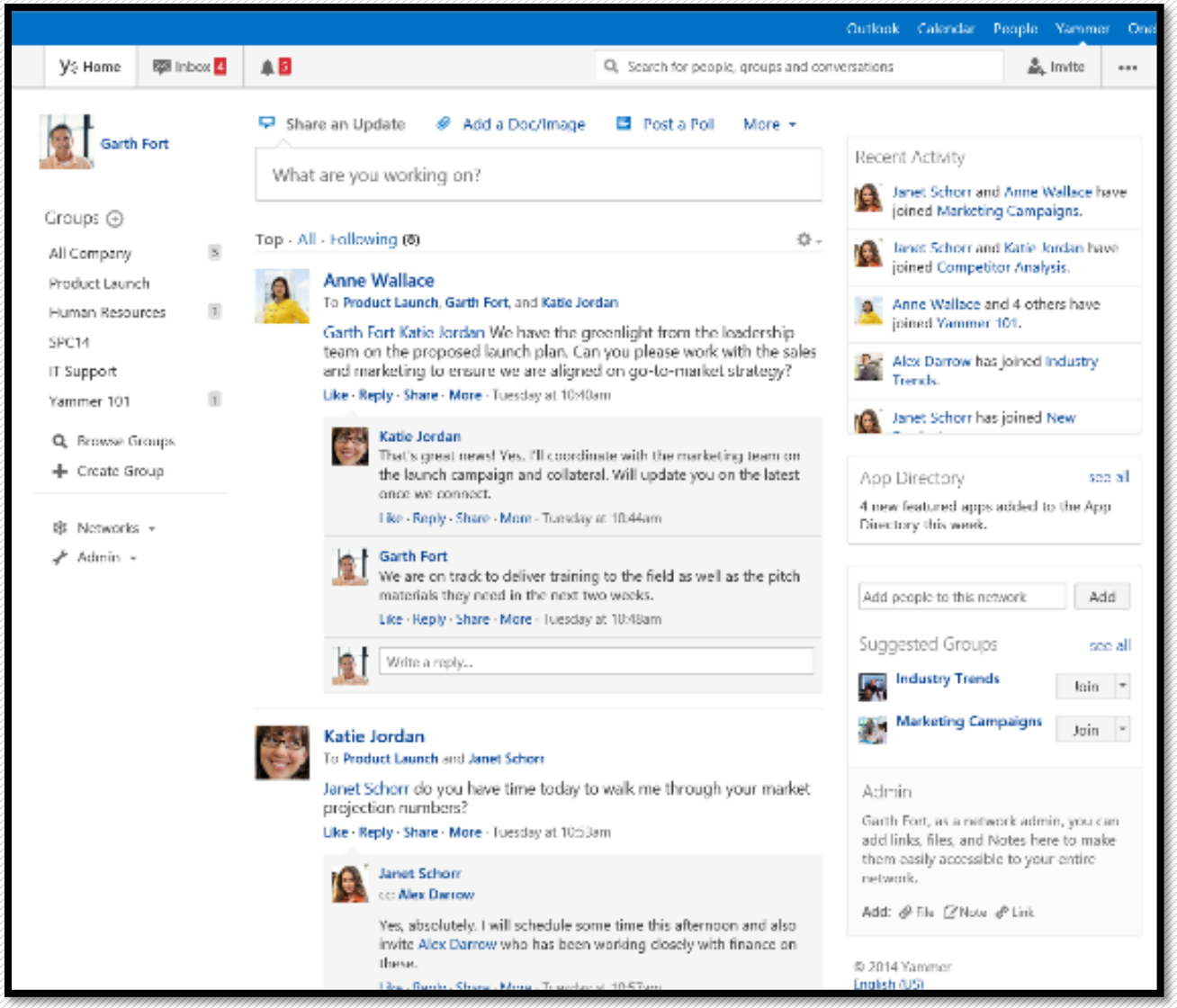
Boss' Boss' Boss



Blogs

Follow, Like, Share...

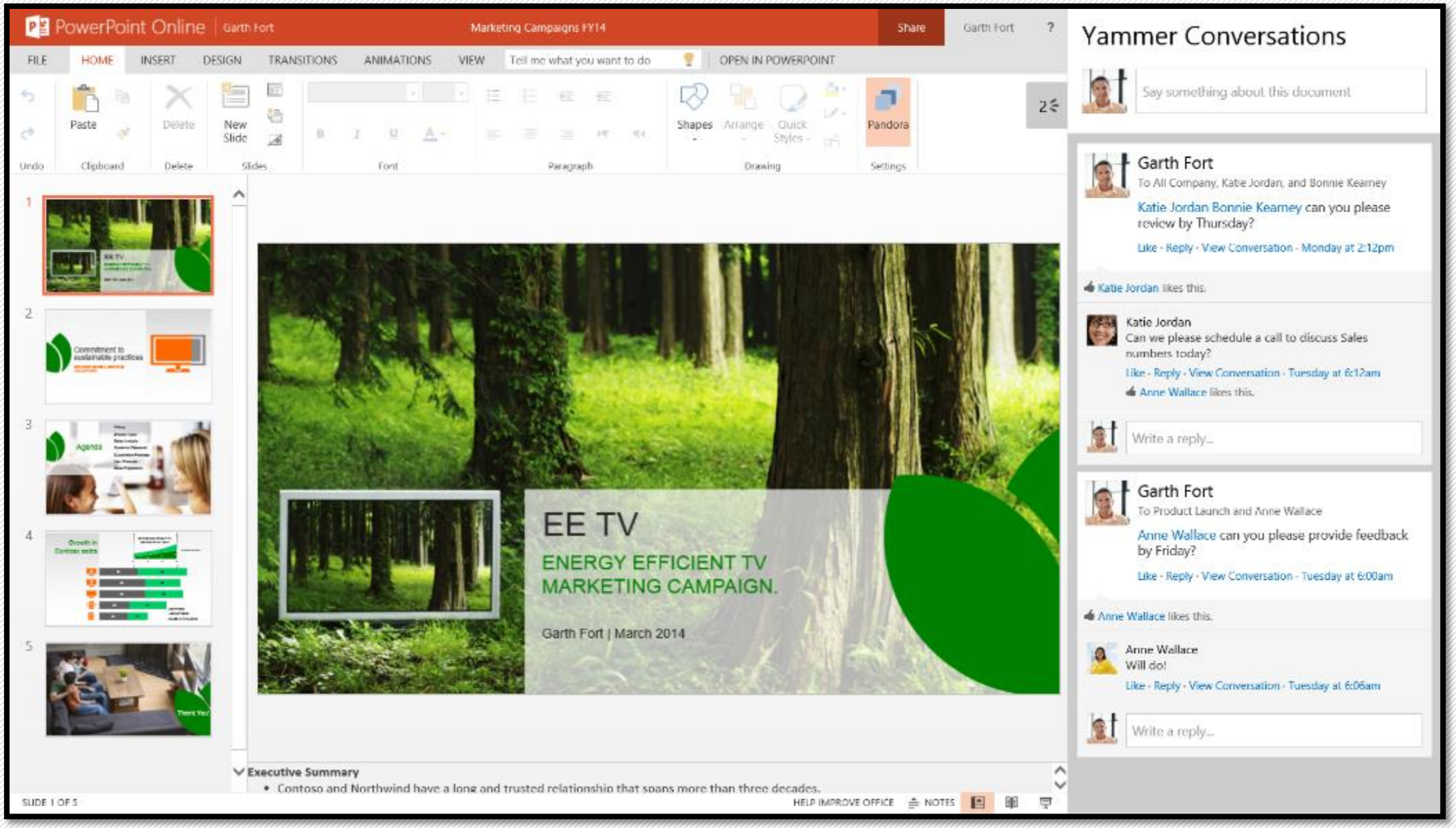
Yammer in the Workplace



Real Yammer Metrics:

- 16,940 users (~61%)
- 2,000 "engaged" users
- 1,767 groups
  - 1,063 public
  - 704 private
- 1,039 mobile users
- 12% of use is mobile

Co-authoring with Office Tools & Yammer Discussions



Enterprise Cloud Storing & Sharing

OneDrive for Business connects SharePoint with your computer

Store Documents Centrally & Access Remotely

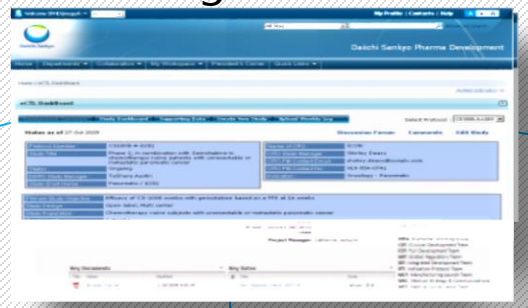
Share files selectively & securely with colleagues, partners, & vendors

Easy access to documents, reports, policies from virtually any device

Global Team Collaboration

Alliance Partner Portal

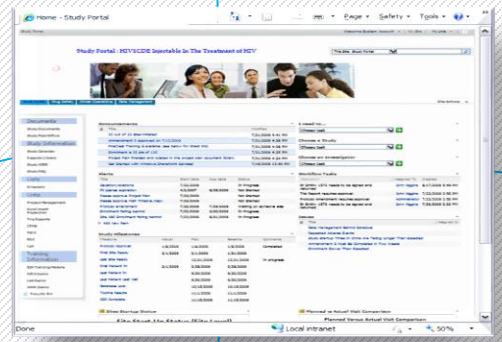
Drug Team Site



Meeting Workspace

CRO Portal

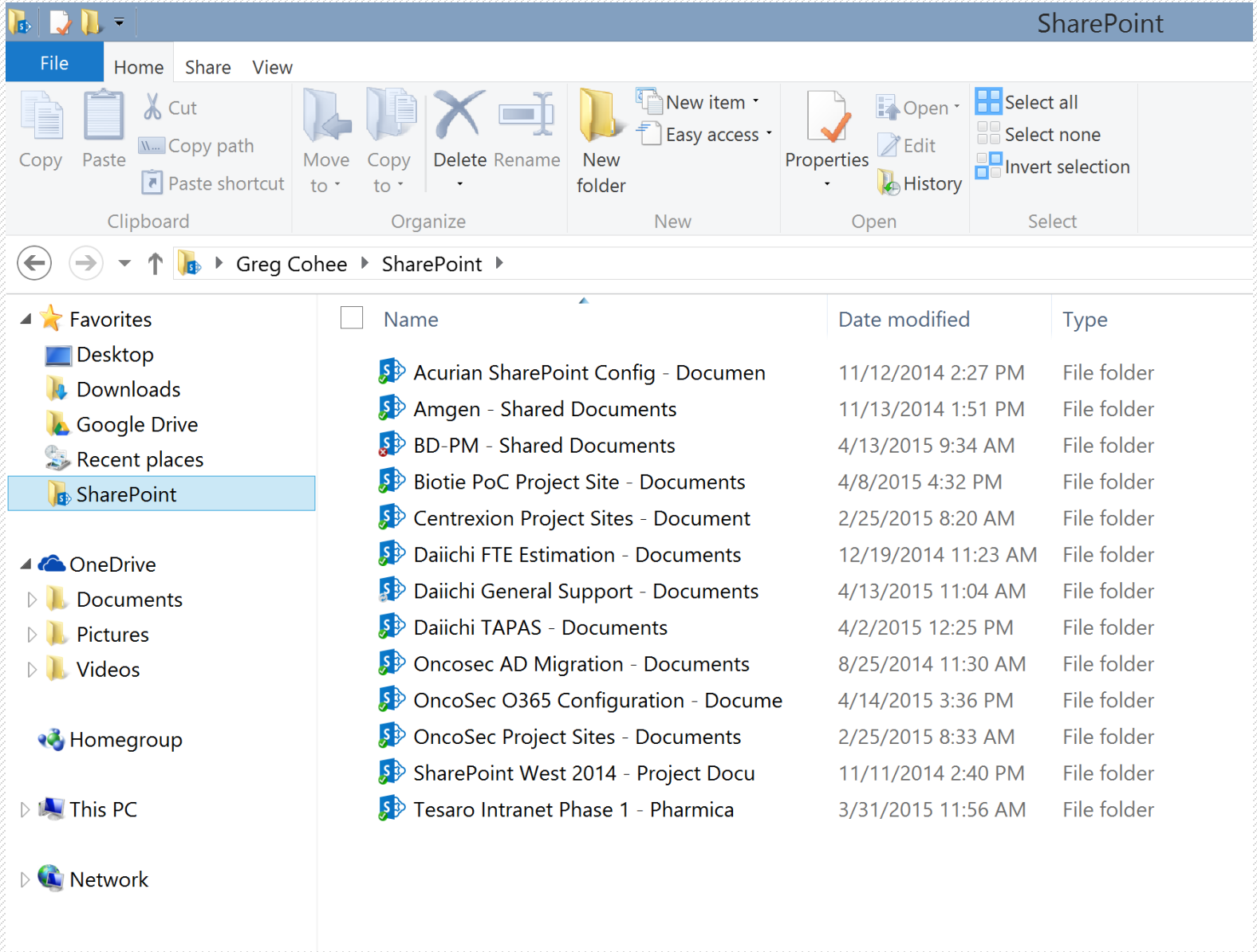
Study Team Site



Meeting Workspace

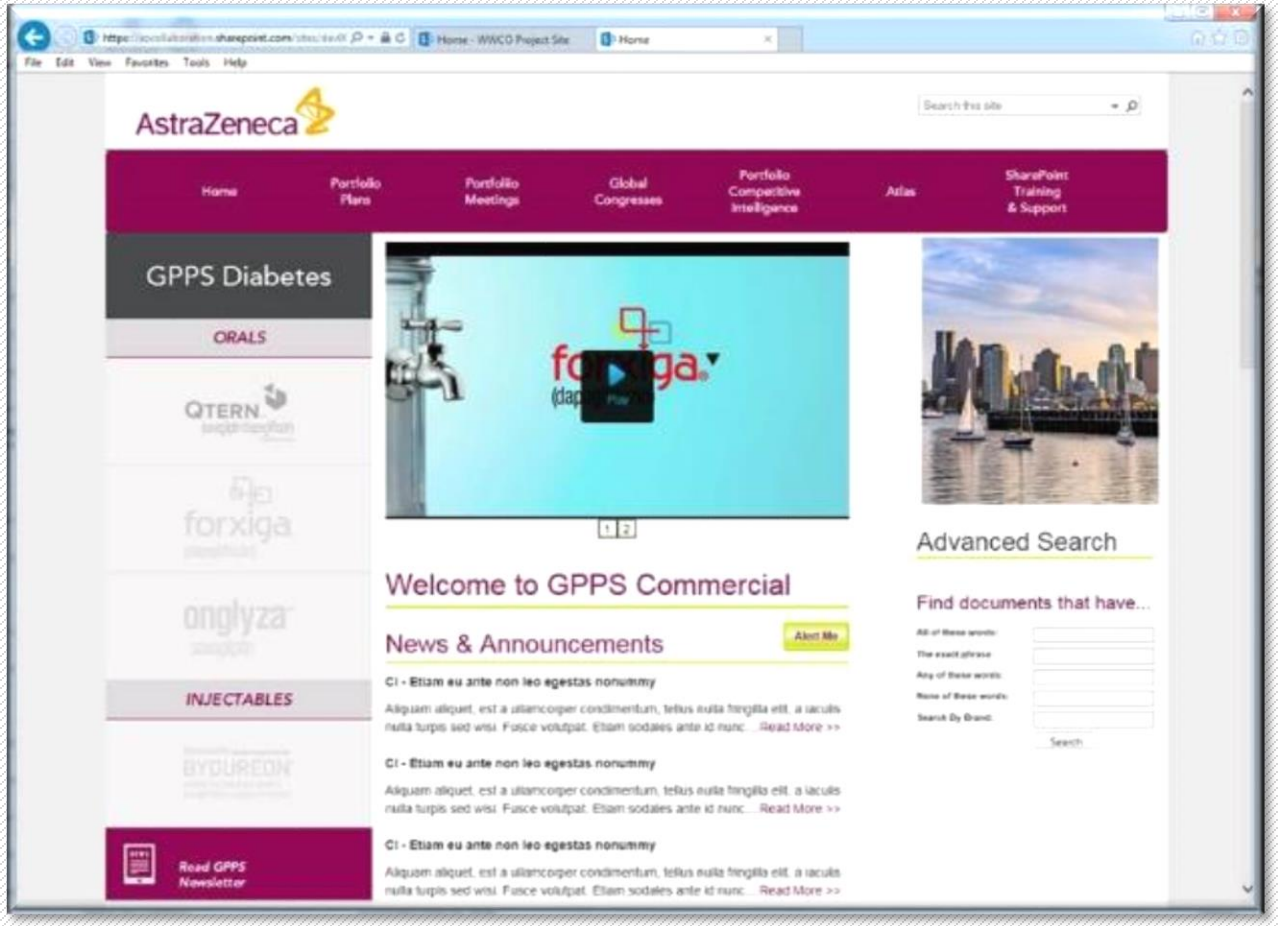
Investigator Portal

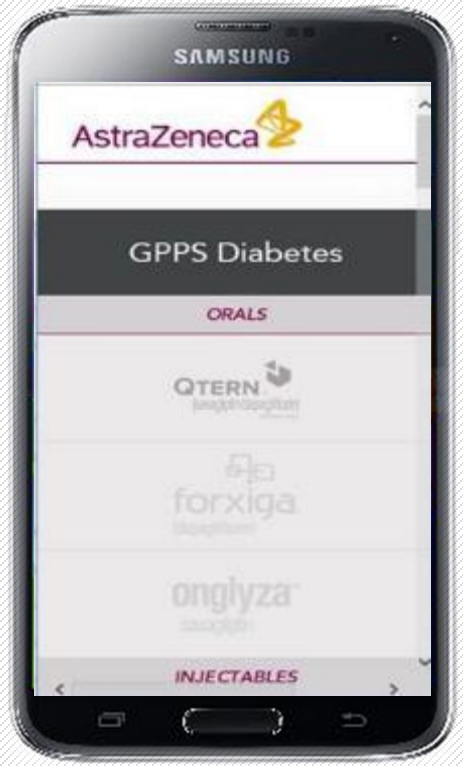
OneDrive

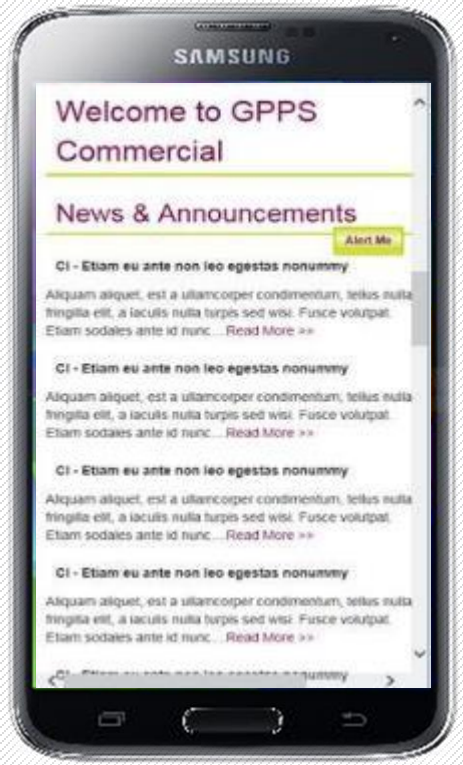


- Connects your desktop to SharePoint
- Personal Document Library & Team sites
- Automatic Syncing
- Offline access
- App for Mobile Devices

Adaptive Design for Mobile Devices







Governance is not just important…it's Critical!

- Site Proliferation and Fragmentation
- Unused sites consume server resources and slow environment
- Lack of consistent look/feel and navigation
- No single point of entry
- News/info-based sites are expensive to create and maintain
- No common means to measure performance vs. investment

Pfizer Intranet Landscape - level 1 (sites accessed from main navigation of world.pfizer.com)

Learn more about Pharmica

Visit our Website
www.pharmicaconsulting.com

Facebook
facebook.com/pharmicaconsulting

Twitter
twitter.com/pharmica

LinkedIn
linkedin.com/company/pharmica-consulting-llc

Greg Cohee
Partner, Pharmica Consulting
215-579-1650
greg.cohee@pharmicaconsulting.com