

# XStream Software Provides SharePoint Expertise

*Envision Financial sought SharePoint expertise in planning, building and rolling out a full-fledged Web Content Management (WCM) Intranet Portal based on the Microsoft SharePoint platform. XStream Software brought its extensive experience and knowledge of the SharePoint platform to the engagement.*

Envision Financial, which offers a full range of deposit, lending, investment, and insurance services to individuals and businesses, is a division of First West Credit Union, British Columbia's third-largest credit union with approximately \$5.6 billion in assets under administration, 167,000 members and 1,150 employees.

## Problem

Envision Financial chose the Microsoft SharePoint platform, based on the recommendation of Microsoft, to solve their Intranet Portal needs. They required a solution that would allow for collaboration, document management, and workflows throughout the organization.

However, Envision Financial lacked the in-house knowledge and capability to deliver the necessary customizations on the SharePoint platform. The lack of understanding of the SharePoint platform prevented Envision Financial from deriving a proper product and delivery roadmap on the SharePoint implementation and rollout. It also prevented the organization from understanding how to properly map out information and categories of information to the SharePoint platform. To compound issues further, Envision Financial needed a way to build out their in-house resources in order to understand, utilize, develop, administer, and sustain SharePoint on a go-forward basis.

## Solution

Envision Financial hired XStream Software to provide SharePoint expertise. XStream Software started the engagement by understanding what Envision Financial as an organization was all about. Then a deep dive was taken to comprehend the reasons why Envision Financial chose SharePoint as a platform and their perceived understanding of the SharePoint platform in order to resolve their Intranet Portal needs.

Next, XStream Software constructed a product roadmap with scheduled delivery phases of customization and features to be built on the SharePoint platform for Envision Financial, based on the understanding of business requirements from various stakeholders. The SharePoint platform to be customized was MOSS 2007, which would enable Envision Financial to achieve its WCM, Enterprise Search, taxonomy, and workflow needs.

As part of its service offerings, XStream Software provided the design and architecture of the custom SharePoint solution to Envision Financial. This included assisting Envision Financial on deriving proper site information architecture, which enabled them to properly store, map, and search relevant information into their custom SharePoint portal through the use of custom data fields, content types, and managed properties for Enterprise Search. In building out the WCM capabilities, custom page layouts and security groups and roles were built and established.

Throughout the engagement, XStream Software recognized the need for Envision Financial to build up their in-house expertise on the SharePoint platform. Consequently, XStream Software worked directly with a small team at Envision Financial, consisting of Business Analysts, Project Managers, .NET developers, QA testers, IT infrastructure personnel, and project sponsors to train and assist in their understanding of SharePoint as the project progressed.

Finally, XStream Software provided deep technical expertise and custom programming in building out various custom SharePoint components required to fulfill the requirements of Envision Financial's Intranet Portal solution.

## Value

By bringing in XStream Software's SharePoint team to analyze and implement a solution to the problems experienced, Envision Financial was able to bridge the gap between what it wanted and how to properly accomplish it on the SharePoint platform.

The benefit that Envision Financial was able to realize was the deployment of a full-blown collaboration Intranet Portal throughout the organization, allowing its many departments to effectively store and share information with each other and its information workers.

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