DataPartner

Invest for SharePoint

Investment Management with Microsoft SharePoint

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Introduction

The Invest for Excel® (i4E) software for capital budgeting and valuation which has been successfully implemented in more than 700 corporations worldwide – is excellent for making calculations, but offers limited support in file administration, workflow and collaboration. The introduction of Microsoft Office SharePoint Server (MOSS) serves as a great platform for creation of a management system, integrated with Invest for Excel®.

Problem Statement

Investment management requires clear approval process and involves usually thorough project documentation. The administration of calculation files, versioning, status, approvals, project groups, workflows etc. have been up to the customer corporations themselves to take care of. Very often there is no good system/ methodology in place. It often results in slow and inefficient investment decision-making process. Needless to say, there is room for improvement.

Current Collaboration Options

Currently files are named and saved in different local or shared folders. The files are sent as E-mail attachments for reviewing and approval. In some cases paper printouts are mailed.

DataPartner's SharePoint Solution

The solution we offer is customized to the customer's needs. The scope of functionality is based on analysis of customer's specifications and preferences. The Invest for SharePoint includes following features such as:

- A browser based solution accessible through internet, from any computer, as long as the user has access to the system.

- Project organization with user rights, decision levels according to investment categorization.

- Templates according to investment categorization.

- Workflow of investment proposals, e.g. investment idea ⇨ reviewing of idea ⇨ simulations ⇨ proposed calculation ⇨ controller audit ⇨ investment request ⇨ management reviewing/ decision ⇨ project budget ⇨ project follow up ⇨ post audit calculation.

- Implementation of an approval process.

- Versioning of calculations and other documents.

- Corporate wide collection of calculations for consolidation, budgeting and reporting

- Collaboration within investment project groups and management.

Benefit 1

A browser based solution that gives the possibility to work anywhere anytime.

- Storage of templates, calculation files, forms, documents & instructions.

- Templates and calculations, accessible directly to & from i4E.

Benefit 2

Gives possibility to implement corporation wide management of documents and processesBenefit 3
Saves time, saves costs, and improves quality and overall manageability of investment processes.

Implementation

Our suggestion for continuation:

1) DataPartner and Customer cooperate to develop a specification on what kind of solution would be ideal for Customer.
2) DataPartner makes a proposal based on Customer specification.
3) Project acceptance and implementation.

Customer has alternative acquisition options: license or Software as a Service (SaaS).

SharePoint implementation may be on Customer's own server or on outsourced servers. System maintenance can also be either done in-house or outsourced.

Summary

The Invest for SharePoint implementation brings order to the investment decision process. Information is no longer scattered around the world, but gathered in one system, accessible from anywhere, at any time, while highly secure - e.g. it can be setup to be accessible by organization's internal networks only. The system gives possibilities for further use of data:

consolidation, budgeting, reporting, statistics.

What is SharePoint?

SharePoint represents a group of products and technologies developed by Microsoft. Three main benefits that SharePoint introduces are efficient collaboration between users, convenient document management system and quick search function – available to every user through a simple web browser interface.

SharePoint incorporates Active Directory user rights management technology, making it possible to design specialized document collaboration processes with certain users/groups being able to approve

documents, comment, review and more.

What makes SharePoint especially convenient is ability to open and save documents (Excel Spreadsheets, Word Documents etc.) directly to and from

the SharePoint server, without the need to manually download or upload the files.

Since at SharePoint, documents are always stored on the server, when user is working with document on a desktop computer, he/she can save the document and immediately open it on a laptop, colleague's computer or any other computer with access to the system.

Links for additional information:
http://en.wikipedia.org/wiki/SharePoint

Starbucks deployed Microsoft Office SharePoint Server 2007 . . . The new portal will be accessed by over 24,000 users . . .

\- Starbucks

Microsoft
Office SharePoint Server 2007
Connecting **people, process**, and **information**