



# SharePoint Applications

## BizPortal – the Microsoft SharePoint Solution for Dynamics NAV

Until now, document management, an easy-to-use intranet and company-wide collaboration have only been available to larger, multinational corporations because of their prohibitive cost.

BizPortal, from Metaphorix partner, Inspired, delivers all these features in a cost-effective package, allowing smaller businesses to enjoy the benefits they offer.

BizPortal is a collaboration solution built on Microsoft SharePoint and integrated with your Dynamics NAV solution that helps to improve the overall efficiency of your business.

### Introducing BizPortal

#### More from your information

BizPortal helps you to make better informed decisions through central access to information and the ability to locate relevant content using a company-wide search engine.

In addition, BizPortal provides facilities to control the security, distribution, reuse and management of documents and other electronic content such as web pages, PDF files and scanned documents.

#### Streamlined processes

In many organisations there are processes that are managed via Excel spreadsheets and email chains.

These are unaudited and unmonitored, which means that labour intensive intervention is required if the process breaks or a progress report is required.

BizPortal allows you to initiate business processes, track, report and complete processes in a controlled manner using the integrated workflow engine.

#### Working together

With all your information stored in a central searchable location, users can easily find the information they are after. Team calendars and group tasks make project management and teamwork simpler.

### Key Features

#### Document Management

Check-in and check-out ensures two people are not working on the same document at the same time.

Version control allows you to compare previous versions of a document and reinstate an older version.

Workflow and authorisation ensures document integrity.

Metadata and indexing ensures documents can always be found.

#### Search

BizPortal provides an enterprise-wide search facility, allowing you to search the content of your documents across your organisation, even your shared network drives.

Built-in document scanning and OCR allows scanned documents to be tagged and searched.

#### Quick to deploy

BizPortal is installed, customised and your users trained in just three days, providing a rapid return on your investment.

The solution is easy to use and integrates with your existing Microsoft Office desktop products offering your users a familiar environment.

The solution comes with its own eLearning module so users can train themselves, reducing the impact on your internal support.

#### Dynamic

As your business changes or new projects are launched, you can quickly create a new portal to manage the project, store the relevant documents, create group tasks and schedule events.

Security is easily controlled through Microsoft's Active Directory – a web-based management console familiar to most IT staff.

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***BizPortal is a collaboration solution built on Microsoft SharePoint and integrated with your Dynamics NAV solution that helps to improve the overall efficiency of your business.***

***BizPortal takes the potential of SharePoint and delivers real benefits through a series of flexible, fully integrated, easy-to-use applications.***

***Add the power of BizPortal to your Dynamics NAV installation.***

## **eLearning**

A suite of eLearning videos and documents on how to use the portal is delivered with BizPortal, ensuring quick adoption of the solution.

Additional content can be added to provide a central training portal for your company.

## **Departmental Portals**

BizPortal is structured to allow your employees to quickly get to work with a solution that makes their life easier, with specific functions for each type of user and department within the company.

## **Sales**

Pipeline management and a CRM application enable you to manage your sales operation.

The forecast and pipeline are easily modified by multiple users and changes are audited. No more managing the forecast with an Excel spreadsheet.

However, the information can be exported and modelled in Excel at the click of a button, allowing management to produce their reports quickly and accurately.

## **Finance**

Purchase orders are raised and authorised in an efficient workflow, allowing you to control your spending.

Expenses are entered by the claimant and authorised with approval audited workflow.

Receipts can be scanned and stored for audit.

Shared calendars ensure critical events are published.

## **HR**

Sick leave and holiday requests are created and authorised within the application.

The annual staff review process can be managed and controlled using BizPortal.

Policy documents are managed and only authorised changes published and audited.

Training of staff is monitored and a list maintained.

A central list of all your staff details is securely stored and maintained.

## **Marketing**

Collateral, logos and brand control documents are available to all authorised staff.

PowerPoint slide decks can be reused using simple click and build functionality.

Projects can be created and managed within BizPortal, ensuring campaigns are well executed.

## **Operations**

An internal support system allows users to open cases and track them to resolution providing you with a knowledge base.

Assets such as software keys are stored within the portal, and a multi-user asset register is available.

Office moves and transition projects can be created and managed with tasks distributed and managed.

## **Customer Support**

Keep track of who has paid for support, their contact details and the cases they have open together with the resolution.

Document management enables support staff to maintain and distribute key documents improving your customers' experience.

## **Management**

A secure area for your management to store and maintain documents, budgets, forecasts and plans is part of BizPortal.

Different levels of security can be applied depending on the level of management accessing the portal.

Key events such as board meetings, senior management meetings and investor meetings can be planned and managed with distributed tasks.

## **Sports and Social**

Staff can communicate social and sporting events from a central controlled environment.

This creates a community feeling around the solution which increases acceptance and adoption.

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