



## Haley & Aldrich Case Study

CORASWORKS

WORKPLACE SOFTWARE FOR SHAREPOINT

### For Collaboration on ISO Registration and Customer Projects, Haley & Aldrich Deploys CorasWorks to Enhance SharePoint

Companies with distributed workforces across several offices need Web-based technology to offer their staff a means to manage projects and collaborate effectively. Haley & Aldrich - a leading consulting firm specializing in underground engineering, environmental science, and environmental management consulting - has a staff that constantly travels to customer sites and to satellite offices. Ensuring their employees can assess project status and update documents on a 24x7 basis is critical to the firm's success.

To help manage internal and external projects so that there was no confusion as to the status of a customer engagement or document, Haley & Aldrich initially turned to Microsoft SharePoint technology. The firm particularly needed to more efficiently manage its ISO 9001 registration project, which involves creating series of documents that define the standards for the Haley & Aldrich quality management system. To achieve this, the firm required three primary attributes from the online collaboration solution:

- Project management capabilities – so that managers could assess individual team member progress on the ISO project and customer projects.
- Version control – to track documents as they pass through the editing process multiple times.
- Document search capabilities – to access industry regulation information within the company database and across the Web.

#### Fulfilling the Need for Online Collaboration

With 16 offices and 500 employees across the United States, Boston-based Haley & Aldrich invested in Microsoft SharePoint as an application that would allow the firm to build Web sites to collaborate on an internal ISO 9001 project and customer projects. However, the solution did not streamline collaboration to the extent that Haley & Aldrich required. "Less than 10 percent of the SharePoint sites were fully utilized," said Trent Parkhill, Director of IT Services at Haley & Aldrich. "We built sites that looked good, but people were not using them because the paradigm did not match the way other Microsoft Office applications work."

To increase the adoption and use of its SharePoint sites, Haley & Aldrich sought several specific improvements:

- Changing the document menu choices so that the most-commonly used choices appear near the top of drop-down menus.
- The ability to launch documents by default in the editing mode rather than the read-only mode – to ensure users do not waste time in the wrong mode.
- Clearer site navigation so users can easily return to Web site starting points.
- Clearly-defined searches – so users know what domain they are searching – the internal site or the Web.
- The ability to move from site-to-site without having to re-enter username and password information.

After conducting research, Haley & Aldrich realized the solution required integrating CorasWorks with SharePoint. CorasWorks' workplace application software transforms Microsoft SharePoint into a platform for building integrated business applications to create an integrated workplace. "But, given how many options were gained by having CorasWorks software installed on top of SharePoint, we felt we needed to work with a solution provider that knew how to maximize the capabilities offered and could contribute business process expertise to make the capabilities work the way we wanted them too," said Parkhill.



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Haley & Aldrich chose to work with Grace-Hunt, experts in customizing business application and platform technologies that improve customer relationship management, financial systems and supply chain management. Parkhill said, "We chose Grace-Hunt based on a strong recommendation from CorasWorks and because of Grace-Hunt's responsiveness. From the proposal process through to today, Grace-Hunt responds quickly when we need help."

Haley & Aldrich partnered with Grace-Hunt to assess their business-process needs. The two companies determined what changes needed to be made to ensure SharePoint and CorasWorks achieved the key objectives of the project:

- Provide a look-and-feel for users similar to Microsoft Office applications.
- Create an internal site at which 80-90 people could collaborate on the ISO 9001 registration project.
- Create sites for customer collaboration and collaboration with other customer vendors.

### **Collaboration Sites Now Used Consistently**

"The best proof that extending SharePoint with CorasWorks has worked is that our ISO 9001 collaboration site has been used consistently since the solution was fully deployed by Grace-Hunt in October 2005," said Parkhill. "We have 80 to 90 people who regularly interact with the site, and their collaboration is helping bring us to ISO registration."

Benefits of the CorasWorks/Microsoft SharePoint Workforce Collaboration Solution:

- Online project management capabilities for internal and customer projects.
- Version control over Word, Excel and other application documents.
- Improved communication on project status.
- Easier to navigate within sites and easier to move from site-to-site.
- More clearly defined search domains.
- Ability to collaborate with other vendors on client projects.
- Helped bring the company closer to completing ISO 9001 registration.