

ManualMaster White Paper

Does ManualMaster have added value when your organization uses
SharePoint Porter Server?



Introduction

In the past, organizations have often considered standard Microsoft products to be a comprehensive solution for the complete automatization of their corporate processes. Our position is that Microsoft is good at offering generic solutions that can be used by a large group of users. Besides, organizations have a need for specific corporate solutions. Quality management and Business Process management are specific examples of such solutions.

In order to offer a product that would make it possible to share information and that would further the cooperation between people and teams, Microsoft launched the first edition of SharePoint Portal Server (SPS) in 2000. From 2006 onwards, SPS has been on its way to conquer a leading position on the Portal Software market. However, with the purchase and implementation of SPS, a new implementation starts, namely: the search for solutions in order to be able to offer them via the portals.

ManualMaster is a set of specific solutions that is momentarily used by more than 700 organizations in ways ranging from management of manuals to Business Process Management. This White Paper gives you direct insight into the differences and similarities between ManualMaster and the possibilities that SPS offers you. Besides, this document aims to give an insight into subjects that often remain underexposed when SPS is applied.

Table of contents

Introduction	2
Table of contents	3
What is ManualMaster?	4
Differences ManualMaster and Sharepoint Portal Server	5
Technique vs Product	5
The core points of ManualMaster	6
Microsoft technology	6
Separate management and reading environments	7
Splitting metadata, lay-out and contents	7
Registration via webforms	8
Insight into achievements via a dashboard	10
Summary	11
ManualMaster – SharePoint Portal Server: added value?	11
Hidden costs?	11
Readymade or DIY?	11
“Food for thought”	11

What is ManualMaster?

Organizations often have tens, hundreds or even thousands of process descriptions, work protocols and forms. In addition, they are managed by different employees, in different departments and locations. There are several levels of authority and regular updates and appendices take place.

It is clear that in these cases, the use of solely word processing tools is no longer adequate. ManualMaster contributes in a positive way to the quality within an organization. ManualMaster helps you by thinking along your lines and by advising you on how to optimize and realize the standardization and management of your process descriptions and making them digitally accessible, together with the documents and forms that are included.

As a software supplier, ManualMaster is market leader in this area and has been active since 1995. The software offers many possibilities and can be implemented broadly in almost any organization looking to professionalize said matters. By now, we help many hundreds of Dutch organizations (also those with locations abroad). ManualMaster is made up of different modules ranging from management of manuals and quality management to Business Process Management.

At the start, an organization is involved with the application as a means of documentation: standardizing corporate goals, processes, procedures and work instructions. The next step is to ensure the documentation reaches the designated person. What often follows is the support of those processes with automatized forms in order to link existing information (like achievement indicators) from your present information system, and possibly to expose them via a dashboard function on your intranet.

Differences ManualMaster and Sharepoint Portal Server

As indicated, this document will zoom in on the differences between both systems. Firstly, the following remark applies: "Can technology be compared to a finished product?"

Technique vs Product

SPS is a technology offered by Microsoft within the total product portfolio. When an organization implements SPS, it is able to:

- offer employees one or more intranet sites;
- organize a search engine;
- save documents and files in a uniform location;
- compose personal pages;
- fill out surveys and forms;
- etc.

In short: with SharePoint Portal Server, an organization not only has the techniques to share information, but also needs the "products" that use the available techniques, in order to create added value for the organization. As in any other technology, SharePoint Portal Server has tools that offer functionality. However, in many cases, those tools must be applied in order to create a product or a service.

When an organization searches for an application to:

- manage stocks;
- register complaints;
- plan services;
- maintain contacts with clients;
- bill delivered goods or;
- manage and clarify protocols, processes and instructions,

it will investigate the market for a product that can offer such solutions, whether or not based on the SharePoint Portal Server technology.

The core points of ManualMaster

ManualMaster is a standard application in which more than 10 years of knowledge and experience are assimilated. Users of ManualMaster are predominantly organizations that are certified according to the norms of, for example, ISO 9001, ISO 14001, GMP or VCA. Therefore, hundreds of features and possibilities are assimilated into ManualMaster, offering solutions to problems ranging from "Management of manuals to Business Process Management".

In global terms, ManualMaster can be subdivided into the following core points:

- the application is based on Microsoft technology;
- management environment and reading environment are separated from one another;
- metadata, layout and contents are separated from one another;
- registrations take place using WebForms;
- insight into achievements are presented via a dashboard.

Based on these core points, the differences and similarities between ManualMaster and SharePoint Portal Server shall be displayed.

Microsoft technology

The technical science behind ManualMaster is based on general standards, including the Microsoft standards. In practice, this means that ManualMaster:

- uses MS-SQL server for data storage;
- must be installed in an MS-Windows (server) environment;
- uses Active Directory for the authentication of users;
- offers intranet publication to users based on HTML and ASP pages;
- uses MS-Word/MS-Excel for word processing;
- uses MS-Visio for process modeling;
- uses internet Information Server for web services;
- uses WebParts for connection to SPS.

Conclusion:

The ManualMaster products connect completely to SharePoint Portal Server technology. SPS and ManualMaster must be installed in approximately identical environments.

Separate management and reading environments

In ManualMaster the management and reading environments are separated. In practice this means that a small number of employees must have knowledge of the ManualMaster application. The reading environment is, after all, a paper or digital manual and no ManualMaster license is needed to read those documents.

The results of separating the environments are, among others:

- documents and processes are not viewed in their original formats;
- quick navigation through manuals;
- the search engine is fed by fixed metadata (titles, abbreviations, etc.), as well as by information in source files (full text);
- information to different user groups can be offered in various ways and in various layouts.

Conclusion:

SPS works primarily based on the setup and presentation of different portals. Within a portal (team, department or other organizational entity), document libraries, for instance, can be created in, which various files can be placed. The manner in which the files can be approached is similar for each employee. A reader will need to approach the documents in the same manner as the manager does, whilst the information need of both employees might differ.

Splitting metadata, lay-out and contents

A document or process must be identified in ManualMaster, based upon features such as layout, code, title, version, owner, etc. These features are standardized centrally and can be implemented de-centrally.

The advantages of this working method are, among others:

- Data in header and footer are managed by ManualMaster. In case of a change in layout, version or classification, ManualMaster will adjust the information centrally and convey it de-centrally;
- Mutual links are managed by ManualMaster:
 - o In the case of a manager, an adjustment of, for instance a title, shall be conveyed as regards content in the various documents, processes, tables of content and alteration lists;
 - o In the case of a reader, document referral by ManualMaster will automatically be "translated" into a hyperlink.
- An adjustment in template shall be conveyed automatically by ManualMaster to all relevant documents;
- A manager is only occupied by the contents of a document. All relevant information, such as the use of standard function names, abbreviations, etc. are managed by ManualMaster. Moreover, such terms are also "translated" into a hyperlink, enabling the reader of the document or process to click on a subject, after which the explanatory text appears on the screen.

Conclusion:

Within SPS, files are predominantly shared. File features are fixed as well as meta information in a limited manner. In the case of, for instance, a version adjustment, SPS will save the old version, but several manual actions will be necessary, such as adjustment of the header and possibly linked documents or processes with hyperlinks that are still active.

Moreover, adjustments in connections are not detected in such a way that proposals are done to carry through reforms. Also, documents are saved separately in SPS; in the case of an adjustment of layout, the entire portal must be scanned for possibly related documents.

Registration via webforms

Many organizations use ManualMaster not only for the management of documents and processes within the quality management system, but also to record various quality registrations. Examples are, among others, complaints, audit results and proposals for improvement, but also records of personnel and administration. As a means of registration, the choice for a fill-in paper or e-mail form is often made, which in its turn runs a certain (pre-fixed) route within the organization.

In order to structure this information, ManualMaster has included a module in the product portfolio: ManualMaster WebForms. With this product, a manager is able to create MS-Word forms that can be directly linked to the digital manual. Moreover, ManualMaster automatically translates the forms to the HTML format, so that a reader does not need to dispose over MS-Word. Naturally, a WebForm can include (variable) routes and (database-filled) fields.

After a form is filled out, it is automatically and structurally saved in the ManualMaster database. A subsequent employee along the route receives a signal via e-mail, after which the form can be completed on the intranet. When all employees involved have dealt with the form, all fixed information can be downloaded, separated from the layout for reporting purposes.

In practice this means that the manager makes a form in MS-Word via ManualMaster, and makes it available via the digital manual. Depending on the license given by the manager, an employee can fill out a form. The employee finds the form by entering a search word via a document (adjustments from within the text), process (via form symbols), navigation item (pull down menu, sitemap, etc) or in the search engine.

After filling out the relevance and obligatory data, the employee presses the "save" button that stores the form in the database. All subsequent actions, such as route information, sending an e-mail, etc. are initiated by ManualMaster.

Conclusion:

In combination with the product InfoPath, SPS offers the possibility to compose forms. When a comparison is made, based on presented functionality, the outcome is that there are various resemblances.

However, the basis for making a ManualMaster WebForm is that the creator is a normal user with knowledge of the organization, ManualMaster and MS-Word. In order to create a form, based on InfoPath (whether combined with SPS or not), broad knowledge of and experience with the entire Microsoft product portfolio are essential; knowledge that will have to be hired or for which an employee shall have to be trained. The questions that immediately rise are:

- What does this mean for MM and SPS?
- What are advantages and disadvantages?
- To what extent will this turn out to be the intended ManualMaster user?
- How much knowledge of the various Microsoft products is present?
- Do you dispose over the required employees and management licenses?
- What must you do to enable your employees to fill out the forms?

In this respect, one must consider user knowledge and configuration of, among others, the following Microsoft products:

- MS-Biztalk server;
used for database links and route management
- MS-WebForms server;
used for storing form information
- Active Directory;
deployed when making hierarchic choices
- Infopath;
deployed when creating forms

If you dispose over solid knowledge of Biztalk Server, WebForms Server, Active Directory and InfoPath, and all your employees have access to said products, you will be able to create similar forms, based on the possibilities of ManualMaster WebForms.

In order for all InfoPath possibilities to be deployed, an InfoPath license is required for the user who fills out forms; certain functions are not (yet) available when a form is filled out without InfoPath.

Insight into achievements via a dashboard

ManualMaster users are organizations that initially deploy ManualMaster for the management and structurizing of documents and processes. In a following phase, ManualMaster is deployed (afterwards or in real-time) to give an insight into the status of registrations that normally would take place by means of a form from the quality manual.

Practice often shows that organizations seek tools that give their employees an insight into the achievements of the company. Examples are primary core numbers such as turnover, sales and profit. However, when this need for information is extended to secondary core numbers such as client satisfaction and complaints, the use of complicated systems (including, for instance, MS-Excel) is required.

There are various systems available on the market to disclose primary core numbers within an organization, whether or not SPS is used as an aid. ManualMaster is initially aimed at disclosing secondary core numbers. Aided by the module ManualMaster Performance Indicators, a manager disposes over a product that gives an insight into the actual status and historic values of an indicator, by means of a dashboard.

An example from everyday practice could be a complaints form. For instance: a manager wishes to give an insight into the number of recorded complaints via the digital manual. The manager has determined upfront what the acceptable number of complaints is and when measurement takes place.

To this end, the manager creates an MS-Word "document" in ManualMaster, which in fact determines the location of the indicator, enabling a user to navigate to it easily. Subsequently, one or more indicators are placed in the document, to which the manager adds information about the form in which they must be presented (that can be, for instance, a clock or a temperature or radio measurement device).

Measurement is subsequently done automatically by ManualMaster, based on the following criteria:

- At predefined intervals, a value is fetched from an employee via ManualMaster WebForm;
- At predefined intervals, a value is fetched via a database request;
- A value is determined through a mathematical calculation, in which one of more WebForm values are related to one or more database values.

An employee can – if sufficiently authorized and after the first measurement – inspect the indicators by clicking to the page where the indicators are stored, via the digital manual or the other methods described previously. If an employee also disposes over ManualMaster WebParts, he or she will be able to install one or more dashboards on his or her personal page.

Conclusion:

There is no standard solution available in SPS or related products, that is aimed at giving an insight into indicator information. It is, of course, possible to create dynamic reports with aids such as MS-Excel Pivot Table. Such a report can subsequently be added to a personal or team page via a WebPart. A structured method for stocking the data to be presented must be considered.

