

What is SharePoint?

1. Content Management System (INA)
2. Collaboration Tool (DIS)
3. “Application” Platform (DIS)
4. Business Intelligence Platform

SharePoint

- **BEST KNOWN FOR:**
 - Document Libraries (also photo libraries)
- **Lists (everything in SharePoint is a list)**
 - Libraries
 - Calendars, Tasks & Links
 - Custom Lists

SharePoint is highly integrated with:

- **Microsoft Office** – Excel & Access menus offer SharePoint functions and SharePoint offers Excel & Access functions.
- **Office Communications Server (OCS)** – Microsoft's instant messaging system has presence integrated into SharePoint
- **SQL Server Reporting Services (SSRS)** – the core of Microsoft's Business Intelligence platform uses SharePoint as its front-end presentation

Types of SharePoint Environments

- Dedicated SharePoint server/farm
- Multi-tenant shared server (ex.-DIS hosted service)
- Office365 – Microsoft’s low-cost, highly-scaled multi-tenant environment for SMBs

- Consider which type of environment is right for your organization based on business needs, security concerns, skillsets available & BUDGET

Skills Required to Run Your Own SharePoint Server or Farm

- Windows Server
- SharePoint Administration
- SQL Server (everything is stored in SQL Server, but you don't access it directly)
- ... and toss in some Exchange Server & Network skills, too.

Considerations – Is SharePoint right for you?

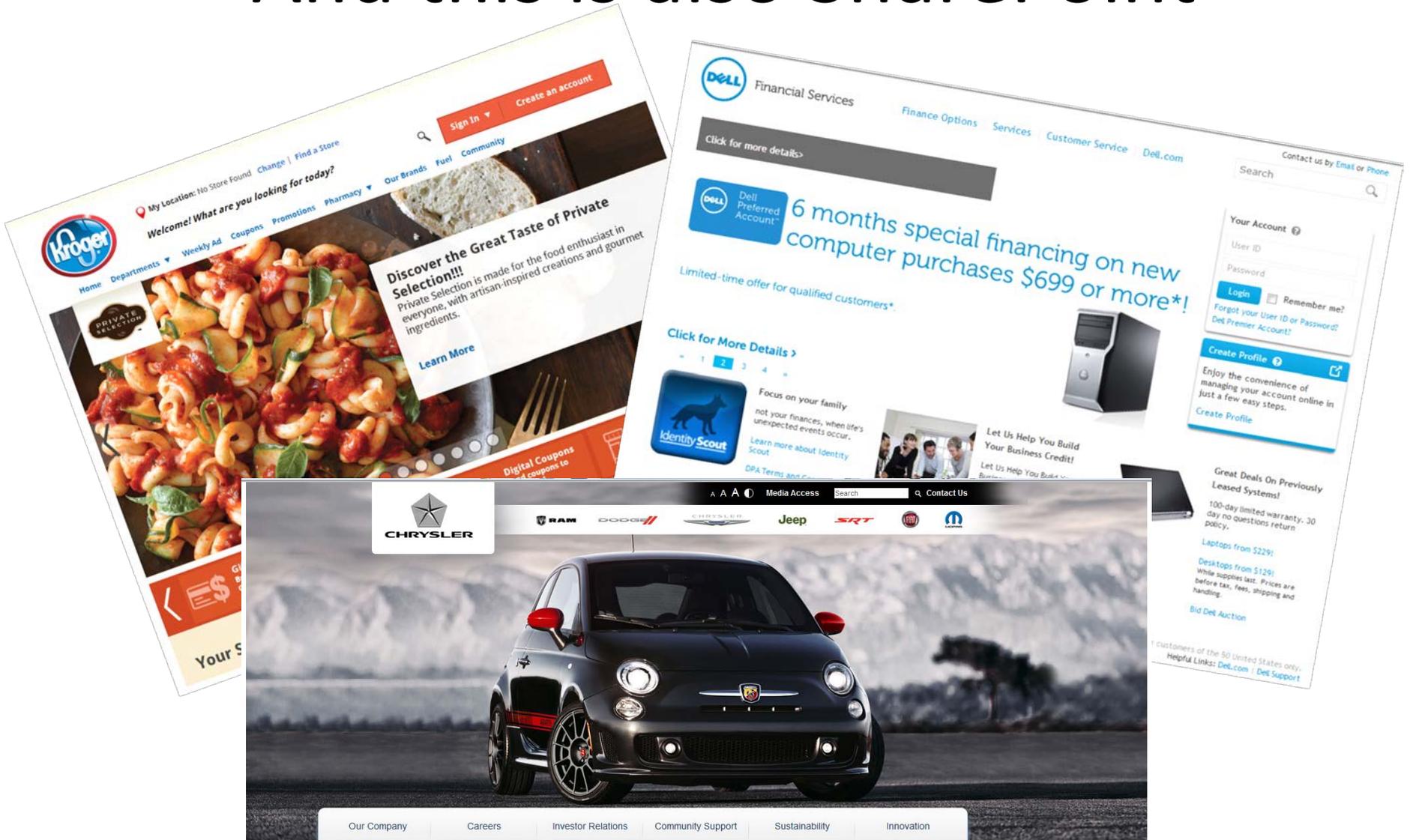
- Budget
- Security & Confidential Documents
 - *SharePoint may not be your answer*
- Compliancy (PCI, HIPPA, etc.)
- Support
 - Host is your critical business partner, providing support & disaster recovery processes
- IN-HOUSE SKILLS
 - No-Code does not mean no skillsets required
 - Can be a steep learning curve

1. Content Management System

- This is SharePoint



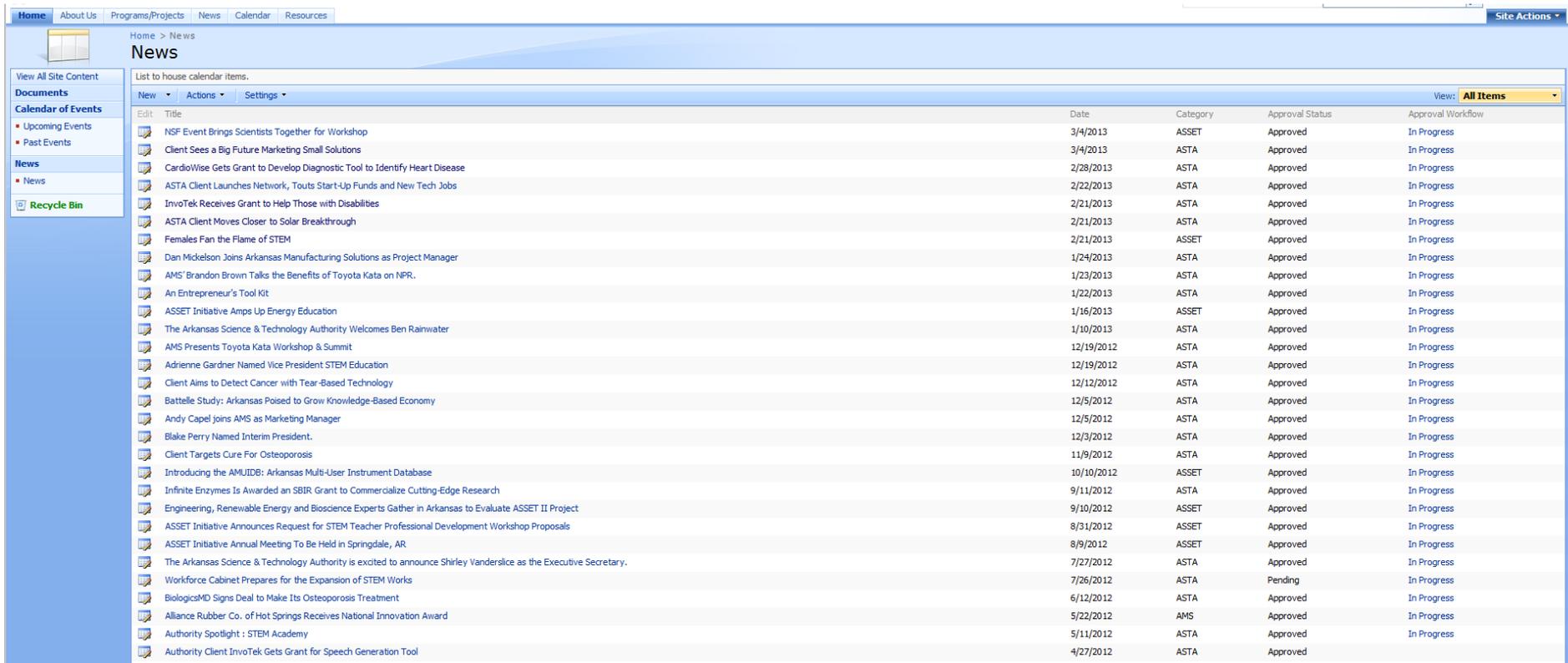
And this is also SharePoint



Content Management System

- Behind the Scenes

- Made up of lists & pages
- Workflow-driven approval process



The screenshot displays a CMS interface for a news section. The top navigation bar includes links for Home, About Us, Programs/Projects, News, Calendar, and Resources. The main content area is titled "News" and shows a list of news items. The list has columns for Title, Date, Category, Approval Status, and Approval Workflow. The items are sorted by date, with the most recent at the top. The interface also includes a left sidebar with navigation options like "View All Site Content", "Documents", "Calendar of Events", "News", and "Recycle Bin".

Edit	Title	Date	Category	Approval Status	Approval Workflow
	NSF Event Brings Scientists Together for Workshop	3/4/2013	ASSET	Approved	In Progress
	Client Sees a Big Future Marketing Small Solutions	3/4/2013	ASTA	Approved	In Progress
	CardioWise Gets Grant to Develop Diagnostic Tool to Identify Heart Disease	2/28/2013	ASTA	Approved	In Progress
	ASTA Client Launches Network, Touts Start-Up Funds and New Tech Jobs	2/22/2013	ASTA	Approved	In Progress
	InvoTek Receives Grant to Help Those with Disabilities	2/21/2013	ASTA	Approved	In Progress
	ASTA Client Moves Closer to Solar Breakthrough	2/21/2013	ASTA	Approved	In Progress
	Females Fan the Flame of STEM	2/21/2013	ASSET	Approved	In Progress
	Dan Mickelson Joins Arkansas Manufacturing Solutions as Project Manager	1/24/2013	ASTA	Approved	In Progress
	AMS' Brandon Brown Talks the Benefits of Toyota Kata on NPR.	1/23/2013	ASTA	Approved	In Progress
	An Entrepreneur's Tool Kit	1/22/2013	ASTA	Approved	In Progress
	ASSET Initiative Amps Up Energy Education	1/16/2013	ASSET	Approved	In Progress
	The Arkansas Science & Technology Authority Welcomes Ben Rainwater	1/10/2013	ASTA	Approved	In Progress
	AMS Presents Toyota Kata Workshop & Summit	12/19/2012	ASTA	Approved	In Progress
	Adrienne Gardner Named Vice President STEM Education	12/19/2012	ASTA	Approved	In Progress
	Client Aims to Detect Cancer with Tear-Based Technology	12/12/2012	ASTA	Approved	In Progress
	Battelle Study: Arkansas Poised to Grow Knowledge-Based Economy	12/5/2012	ASTA	Approved	In Progress
	Andy Capel Joins AMS as Marketing Manager	12/5/2012	ASTA	Approved	In Progress
	Blake Perry Named Interim President.	12/3/2012	ASTA	Approved	In Progress
	Client Targets Cure For Osteoporosis	11/9/2012	ASTA	Approved	In Progress
	Introducing the AMUIDB: Arkansas Multi-User Instrument Database	10/10/2012	ASSET	Approved	In Progress
	Infinite Enzymes Is Awarded an SBIR Grant to Commercialize Cutting-Edge Research	9/11/2012	ASTA	Approved	In Progress
	Engineering, Renewable Energy and Bioscience Experts Gather in Arkansas to Evaluate ASSET II Project	9/10/2012	ASSET	Approved	In Progress
	ASSET Initiative Announces Request for STEM Teacher Professional Development Workshop Proposals	8/31/2012	ASSET	Approved	In Progress
	ASSET Initiative Annual Meeting To Be Held in Springdale, AR	8/9/2012	ASSET	Approved	In Progress
	The Arkansas Science & Technology Authority is excited to announce Shirley Vanderslice as the Executive Secretary.	7/27/2012	ASTA	Approved	In Progress
	Workforce Cabinet Prepares for the Expansion of STEM Works	7/26/2012	ASTA	Pending	In Progress
	BiologicsMD Signs Deal to Make Its Osteoporosis Treatment	6/12/2012	ASTA	Approved	In Progress
	Alliance Rubber Co. of Hot Springs Receives National Innovation Award	5/22/2012	AMS	Approved	In Progress
	Authority Spotlight : STEM Academy	5/11/2012	ASTA	Approved	In Progress
	Authority Client InvoTek Gets Grant for Speech Generation Tool	4/27/2012	ASTA	Approved	In Progress

2. Collaboration Tool

“One Version of the Truth”

- Document Libraries
- Calendars
- Issues Lists
- Tasks Lists
- Custom Lists
- Wikis (good for knowledgebases)

3. “Application Platform”

- Use built-in forms or create custom forms using SharePoint Designer or InfoPath
- Use custom lists to simulate database tables
- Use workflows (either SharePoint Designer workflows or Visual Studio workflows) to automate business processes.
- Combine to create “no code solutions” that can replace manual processes or custom-coded programs

What is a workflow?

- A set of procedural steps used to to automate business processes
- Can be created using 2 methods/tools:
 - SharePoint Designer (no-code, does not require server access, more limited)
 - Visual Studio (requires programming language knowledge & access to server, more robust)
- Both types of workflows utilize Microsoft's Windows Workflow Foundation
- Workflows are attached to a specific list

A SharePoint Designer Workflow

The screenshot shows the Microsoft Office SharePoint Designer interface. The title bar indicates the URL is <http://tranet.asta.arkansas.gov/ttag>. The menu bar includes File, Edit, View, Insert, Format, Tools, Table, Site, Data View, Task Panes, Window, and Help. The Folder List pane on the left shows a tree structure under 'Workflows' with the following items: ADMIN TESTING WORKFLOW, Awarded TTAG Warrant Requests Final Report WF, Awarded TTAG Send Email to Enterprise and Resource Provider (highlighted), Awarded TTAG WF, Begin TTAG Review, Copy Online Application, Copy Test, and Create Batch. The main workspace displays the 'Contents of 'Awarded TTAG Send Email to Enterprise and Resource Provider'' table.

Name	Size	Type	Modified Date	Modified By
Awarded TTAG Send Email to Enterprise and Resource Pr...	11KB	aspx	10/2/2012 7:58 AM	ASTA\spadmin
Awarded TTAG Send Email to Enterprise and Resource Pr...	28KB	xml	10/2/2012 9:09 AM	ASTA\spadmin
Awarded TTAG Send Email to Enterprise and Resource Pr...	24KB	rules	10/2/2012 9:09 AM	ASTA\spadmin
Awarded TTAG Send Email to Enterprise and Resource Pr...	2KB	xml	10/2/2012 9:10 AM	ASTA\spadmin

1. Attach SPD workflow to a list
2. Select when the workflow should start (a new instance)

Define your new workflow

Choose the type of workflow and the conditions under which this new workflow should run.

Give a name to this workflow:
Awarded TTAG Send Email to Enterprise and Resource Prov

What SharePoint list should this workflow be attached to?
Awarded TTAGs } 1

Select workflow start options for items in Awarded TTAGs:

- Allow this workflow to be manually started from an item
- Automatically start this workflow when a new item is created
- Automatically start this workflow whenever an item is changed

Help

- The workflow name given here will be used to identify the workflow to end users.
- By attaching this workflow to a List, it makes it possible to initiate the workflow for Items in that List.
- The start options reflect when the workflow will be run for Items in the attached List.

[Click here for more help...](#)

Check Workflow Initiation... Variables... Cancel < Back Next > Finish

Workflows are built in STEPS with CONDITIONS & ACTIONS

The image displays two screenshots of the Workflow Designer interface. The top screenshot shows a workflow step named "Send Award Email to Enterprise and Resource Provider". It features a conditional branch with three paths: "If Organization equals AMS", "Else if Organization equals ASTA", and "Else if Organization not equals AMS and Organization not equals ASTA". Each path has associated actions for emailing TTAGs and logging the notification. The bottom screenshot shows a workflow step named "Stop workflow with log message.", which has a single action to stop the workflow and log "Workflow ending.".

Workflow Designer - Awarded TTAG Send Email to Enterprise and Resource Provider

Step Name: Send Award Email to Enterprise and Resource Provider

Specify details for 'Send Award Email to Enterprise and Resource Provider'

Choose the conditions and actions that define this step of the workflow.

- Conditions** ▼ If Organization equals AMS
- Actions** ▼ Email Awarded TTAGs:Email Address; Awarded TTAGs:RP Email
then Log Emailed AMS provider notification form to Enterprise & Resource Provider. to the workflow history list
- Conditions** ▼ Else if Organization equals ASTA
- Actions** ▼ Email Awarded TTAGs:Email Address; Awarded TTAGs:RP Email
then Log Emailed ASTA provider notification form to Enterprise & Resource Provider. to the workflow history list
- Conditions** ▼ Else if Organization not equals AMS
and Organization not equals ASTA
- Actions** ▼ Email ASTA\spadmin

[Add 'Else If' Conditional Branch](#)

Workflow Steps

- Send Award Email to Enterprise and Resource Provider
- Stop workflow with log message.

[Add workflow step](#)

Check Workflow Initiation... Variables...

Workflow Designer - Awarded TTAG Send Email to Enterprise and Resource Provider

Step Name: Stop workflow with log message.

Specify details for 'Stop workflow with log message.'

Choose the conditions and actions that define this step of the workflow.

- Conditions** ▼
- Actions** ▼ Stop the workflow and log Workflow ending.

[Add 'Else If' Conditional Branch](#)

Workflow Steps

- Send Award Email to Enterp...
- Stop workflow with log mes...

[Add workflow step](#)

Conditions

The screenshot displays a software interface for configuring workflow steps. The main window is titled "Workflow Designer - Awarded TTAG Send Email to Enterprise and Resource Provider".

Step Name: Step 3

Specify details for 'Step 3'

Choose the conditions and actions that define this step of the workflow.

Conditions (dropdown menu):

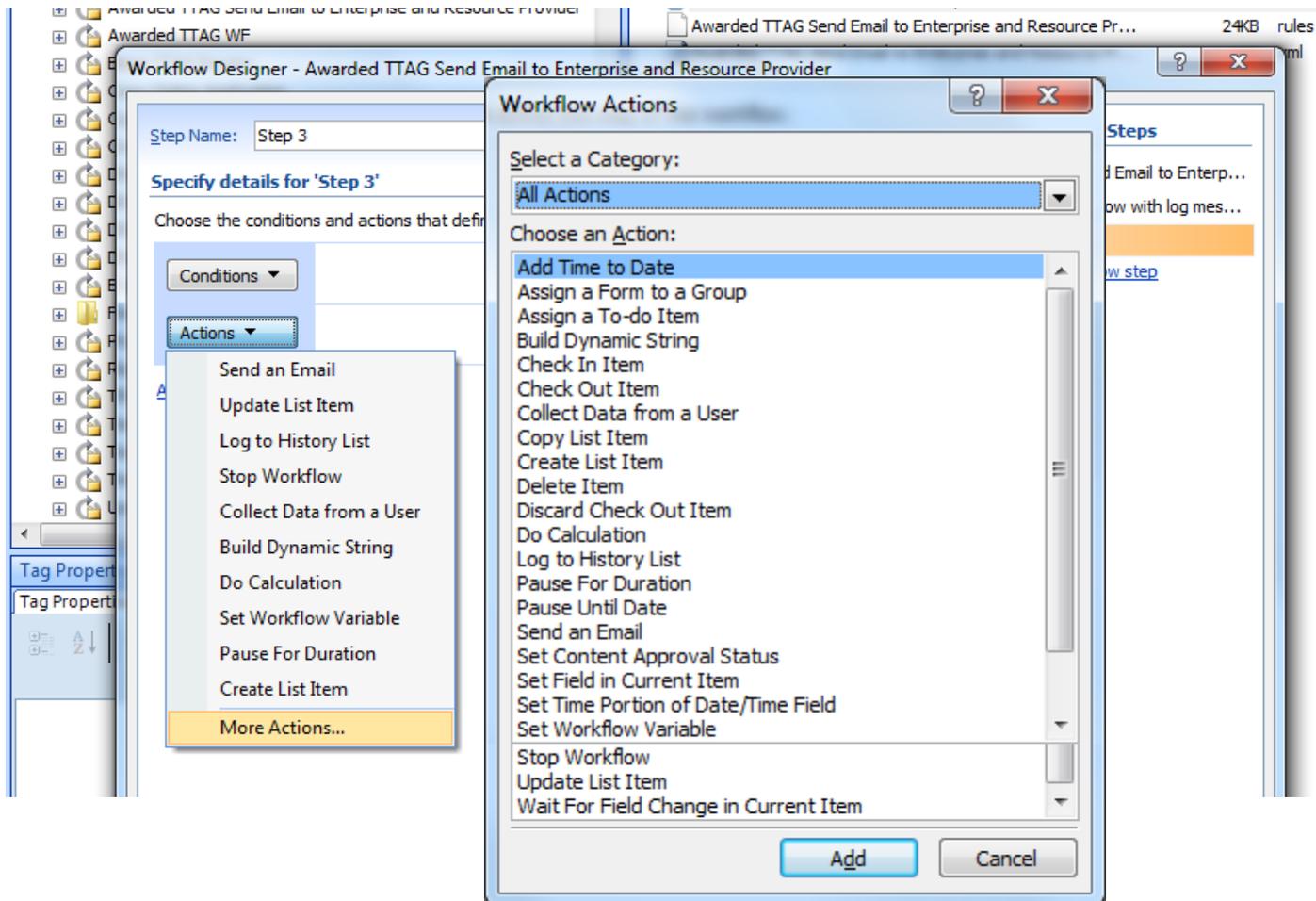
- Compare Awarded TTAGs field
- Compare any data source
- Title field contains keywords
- Modified in a specific date span
- Modified by a specific person
- Created in a specific date span
- Created by a specific person

Workflow Steps

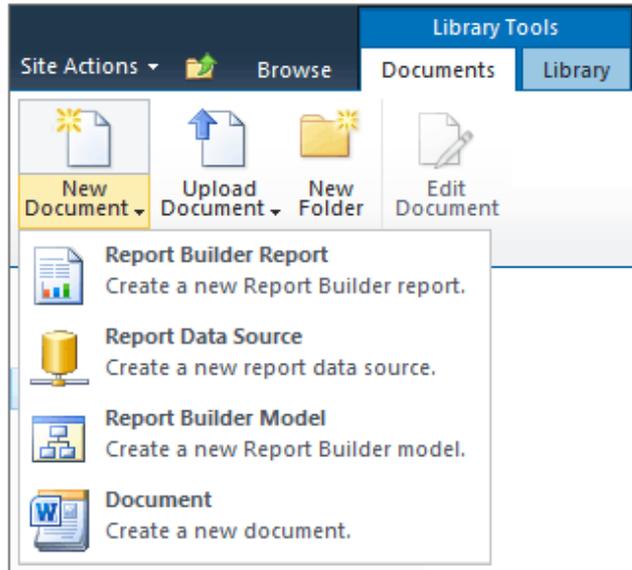
- Send Award Email to Enterp...
- Stop workflow with log mes...
- Step 3** (highlighted)
- [Add workflow step](#)

At the bottom left, there are tabs for "Tag Property" and "Tag Property".

Actions



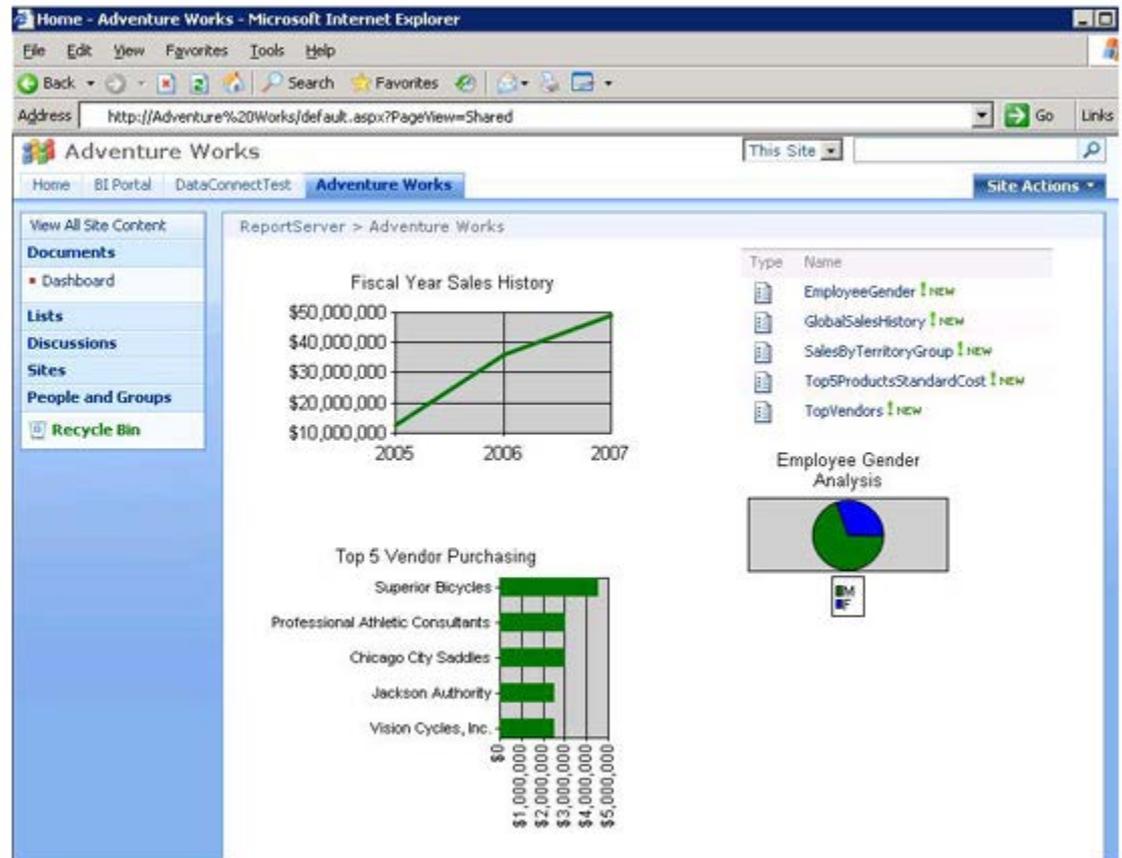
4. Business Intelligence Platform



<- Data Connections provide connectivity to data sources (databases, etc.)

Reporting Services (SSRS) reports can be designed in Visual Studio (BIDS) or in a more user-friendly web browser tool called Report Builder.

Similar to Crystal Reports.



EXAMPLE:

Check Register

- Utilizes:
 - Custom lists
 - Security groups control access & functions
 - Email alerts
- *NOTE: This is not a financial system and does not contain any non-public information.*

Check Register Form

(this is a standard auto-generated form)

ASTA Check Register > Check Register Entry > New Item

Check Register Entry: New Item

OK Cancel

Attach File | Spelling... * indicates a required field

FY *	2013
Deposit Type *	-- SELECT DEPOSIT TYPE -- -- SELECT DEPOSIT TYPE -- Check EFT Credit Card Interest
Company or Organization	
First	
MI	
Last	
Date Funds Received *	<input type="text"/>
Check Number	<input type="text"/>
EFT Number	<input type="text"/>
Amount *	<input type="text"/>
Fund Type	-- SELECT ONE --
Date Deposit Slip Received	<input type="text"/>
Treasury Receipt Account Number	<input type="text"/>
Notes	<input type="text"/>
Exclude	<input type="checkbox"/> Use this field to exclude a check that was entered but was correctly not deposited (such as a check ASTA received that should have gone to another agency). Enter notes to document why this item was excluded.

OK Cancel

Check Register Email Alert

Alert received:

 If there are problems with how this message is displayed, click here to view it in a web browser.

Sent: Thu 2/14/2013 11:00 PM

To: James E Downs

FY	2013
Deposit Type	Check
Company or Organization	Auditor of State of Arkansas
Date Funds Received	2/14/2013
Check Number	13W-0526680
Amount	\$2,500.00
Fund Type	-- SELECT ONE --
Notes	FY13 Sponsor, AMS Gold Sponsor
Exclude	No

Check Register List

ASTA Check Register > Check Register Entry

Check Register Entry

View: 2013 Deposits Grouped

Count = 247 **Sum = \$3,650,011.94**

Fund Type: -- SELECT ONE -- (2) **Count = 2** **Sum = \$3,875.00**

ID	FY	Company or Organization	Date Funds Received	First	MI	Last	Check Number	EFT Number	Amount	Exclude	Fund Type	Date Deposit Slip Received	Treasury Receipt Account Number	Notes	Deposit Type
1110	2013		3/11/2013				19523		\$1,250.00	No	-- SELECT ONE --			TTAG #13-TTAG-063	Check
1111	2013		3/11/2013				384912		\$2,625.00	No	-- SELECT ONE --			50% of Training Fee	Check
									Sum = \$1,124,766.81						
860	2013		7/2/2012				482376		\$600.00	No	AMS	7/11/2012	1300581		Check
861	2013		7/2/2012				1542366		\$22,275.00	No	AMS	7/9/2012	1300302	Invoice 18415686	Check
864	2013		7/2/2012				00290584		\$90.00	No	AMS	7/9/2012	1300302	Invoice 18422172	Check
865	2013		7/2/2012				43351		\$1,250.00	No	AMS	7/9/2012	1300303	12-TTAG-071	Check
866	2013		7/9/2012				330390		\$250.00	No	AMS	7/11/2012	1300581	18420374-AR	Check
871	2013		7/9/2012						\$763.88	No	AMS	7/9/2012	1300307	Class Registrations	Credit Card
873	2013		7/10/2012				657754		\$1,200.00	No	AMS	7/11/2012	1300580	18422159	Check
874	2013		7/10/2012				20300876		\$2,500.00	No	AMS	7/11/2012	1300580	18422298	Check
875	2013		7/11/2012				4554316		\$30.00	No	AMS	7/13/2012	1300883	18420690	Check
877	2013		7/16/2012				431145		\$600.00	No	AMS	7/20/2012	1301538		Check
879	2013		7/17/2012					140431524	\$97.00	No	AMS	7/17/2012	1301155	Class Restractions	EFT
878	2013		7/18/2012				17509		\$4,000.00	No	AMS	7/19/2012	1301395	Invoice 1842156	Check
880	2013		7/20/2012				134489		\$2,000.00	No	AMS	7/20/2012	1301538	Invoice 18425675	Check
884	2013		7/25/2012					65467027	\$87.30	No	AMS	7/25/2012	1301895	Class Registraton	Credit Card

EXAMPLE:

ASSET II Invoicing

— it's just a standard SharePoint site!

- Utilizes:

- Custom Lists & Email Alerts

The screenshot displays a SharePoint site for ASSET II Invoicing. At the top, there is a header banner with the Arkansas Science & Technology Authority logo on the left and the text 'AssetII' on the right. Below the banner is a navigation bar with links: Home, Intranet, Board of Directors, Smart Grid Portal, Commercialization, EPSCoR, Research, K-12 Grants, TTAG, Public Forms, Search Center, ASTA Test Team Site, TTAG Test, AMS, **AssetII**, and EPSCoR_DB. The main content area is titled 'ASTA > AssetII' and contains two sections: 'Announcements' and 'Calendar'. Both sections indicate that there are currently no active announcements or upcoming events, respectively, and provide a link to 'Add new announcement' or 'Add new event'. On the left side, there is a sidebar with navigation options: 'View All Site Content', 'Documents' (with a link to 'Shared Documents'), 'Lists' (with links to 'Calendar' and 'Tasks'), 'Discussions' (with a link to 'Team Discussion'), 'Sites' (with links to ASU, UALR, UAF, UCA, UAPB, UAFS, and PSC), and 'People and Groups'. At the bottom of the sidebar is a 'Recycle Bin' icon.

- A custom list:

The screenshot shows a SharePoint interface for a custom list named "Invoice Form - ASU". The breadcrumb path is "ASU > Invoice Form - ASU". The left-hand navigation pane includes sections for "Documents" (with "Revised Budgets - ASU"), "Lists" (with "Calendar", "Tasks - ASU", and "Invoice Form - ASU"), "Discussions" (with "Team Discussion"), "Sites", "People and Groups", and a "Recycle Bin". The main content area features a table with columns: "Edit" (with a trash icon), "ID", "Organization", "Funding Source", "Center", and "Program Year". Above the table, there are dropdown menus for "New", "Actions", and "Settings", and a "Count = 54" indicator. The table contains five rows of data:

Edit	ID	Organization	Funding Source	Center	Program Year
	31	ASU	NSF	P3	Year 1
	32	ASU	NSF	VICTER	Year 1
	33	ASU	NSF	P3	Year 1
	34	ASU	NSF	VICTER	Year 1
	35	ASU	NSF	P3	Year 1

- A (*simple*) standard form:

ASU > Invoice Form - ASU > New Item

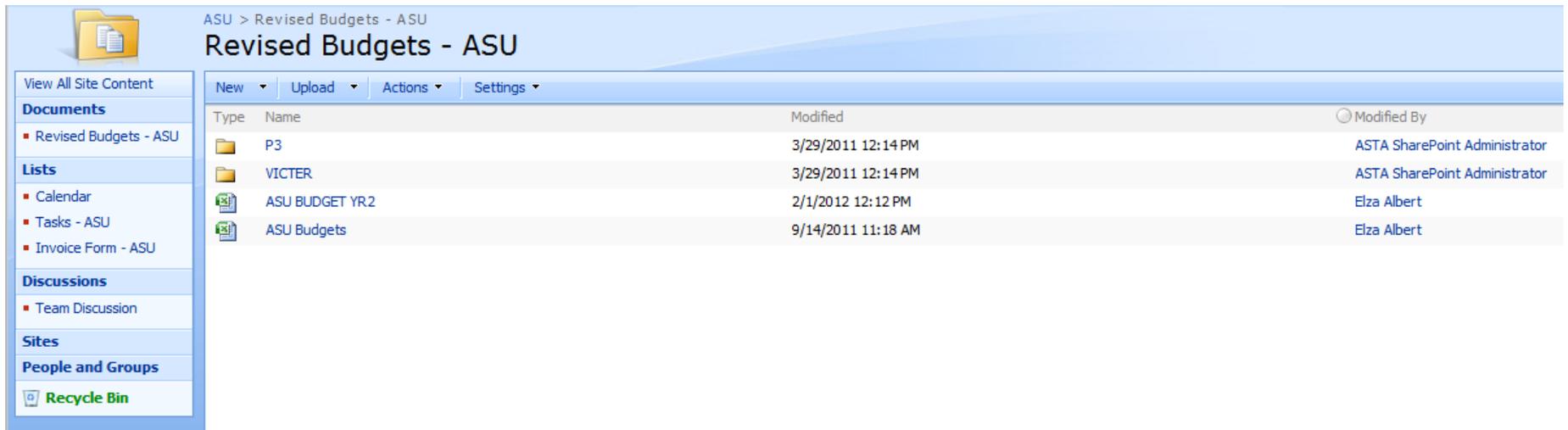
Invoice Form - ASU: New Item

OK Cancel

Attach File | Spelling... * indicates a required field

Invoice Number	<input type="text"/>
	(Enter your organization's invoice number.)
Organization	ASU ▾
Center *	-- SELECT CENTER -- ▾
Funding Source	-- SELECT FUNDING SOURCE -- ▾
Program Year	-- SELECT PROGRAM YEAR -- ▾
Principal Investigator *	-- SELECT PROGRAM YEAR -- Year 1 Year 2 Year 3 Year 4 Year 5
Title	<input type="text"/>
Senior Personnel - Dockter, Michael	<input type="text"/>
Senior Personnel - Cramer, Carole	0.00 <input type="text"/>
Senior Personnel - Hood, Elizabeth	0.00 <input type="text"/>
Senior Personnel - Devereux, Emily	0.00 <input type="text"/>
Senior Personnel - Engelken, Robert	0.00 <input type="text"/>
Senior Personnel - Johnson, J. Bruce	0.00 <input type="text"/>
Senior Personnel - Chaudhury, Zariff	0.00 <input type="text"/>
Senior Personnel - Brent Carroll	0.00 <input type="text"/>
Other Personnel - Post Doctoral Associates	0.00 <input type="text"/>
Other Personnel - Other Professionals	0.00 <input type="text"/>
Other Personnel - Graduate Students	0.00 <input type="text"/>
Other Personnel - Undergraduate Students	0.00 <input type="text"/>

- A document library to hold budgets:



ASU > Revised Budgets - ASU
Revised Budgets - ASU

View All Site Content

Documents

- Revised Budgets - ASU

Lists

- Calendar
- Tasks - ASU
- Invoice Form - ASU

Discussions

- Team Discussion

Sites

People and Groups

Recycle Bin

New Upload Actions Settings

Type	Name	Modified	Modified By
Folder	P3	3/29/2011 12:14 PM	ASTA SharePoint Administrator
Folder	VICTER	3/29/2011 12:14 PM	ASTA SharePoint Administrator
Excel	ASU BUDGET YR.2	2/1/2012 12:12 PM	Elza Albert
Excel	ASU Budgets	9/14/2011 11:18 AM	Elza Albert

- A custom workflow was added to assign tasks when a new invoice is added

The screenshot displays the Microsoft Office SharePoint Designer interface for configuring a workflow. The main window shows the 'Contents of 'ASU Assign Task to ASTA'' table, which lists the workflow files and their properties.

Name	Title	Size	Type	Modified Date	Modified By
ASU Assign Task to ASTA.aspx	Workflows/ASU Assign Ta...	11KB	aspx	3/8/2011 8:06 PM	ASTA\spadmin
ASU Assign Task to ASTA.xml	Workflows/ASU Assign Ta...	9KB	xml	3/27/2011 8:43 PM	ASTA\spadmin
ASU Assign Task to ASTA.xml.wfconfig.xml	ASU Assign Task to ASTA...	1KB	xml	3/27/2011 8:44 PM	ASTA\spadmin

The 'Workflow Designer - ASU Assign Task to ASTA' dialog box is open, showing the configuration for a step named 'Assign ASTA Task'. The 'Specify details for 'Assign ASTA Task'' section is active, displaying the following configuration:

Step Name: Assign ASTA Task

Specify details for 'Assign ASTA Task'

Choose the conditions and actions that define this step of the workflow.

Conditions: (None selected)

Actions: Store [%Invoice Form - ASU:...] in Variable: TaskTitle then Create item in Tasks - ASU (Output to Variable: create)

Workflow Steps: Assign ASTA Task (Selected), Add workflow step

Buttons: Check Workflow, Initiation..., Variables..., Cancel, < Back, Next >, Finish

EXAMPLE:

TTAG – Technology Transfer Assistance Grant Program

- Utilizes:
 - Custom SharePoint lists (including tasks)
 - Custom Form (SPD today, InfoPath tomorrow)
 - SharePoint Designer workflows
 - MS-Access integration & Crystal Reports
 - Email alerts & notifications
 - Automatically generated documents

Custom Form (today- SPD. tomorrow – InfoPath.)

Rules, Guidelines and Forms

The following forms are pdf documents and require the free Adobe Reader to view or print.

- [Rules - PDF](#)
- [Guidelines](#)
- [Online Application](#)
- [Match Agreement - PDF](#)
- [Online Application Instructions - PDF](#)
- [Application/Resource Provider - PDF](#)

Note: Resource Providers will have to fill out the above form in order to participate in
[Final Report Form - PDF](#)
[Form W-9 - PDF](#)



ARKANSAS
SCIENCE & TECHNOLOGY
AUTHORITY

TTAG

Technology Transfer Assistance Grant (TTAG) Program Application

Enterprise Information

Company Name:

NAICS Code: ([Click here for NAICS Lookup](#))

Address:

City:

State:

ZIP:

County:

Number of Employees:

Year Established:

Company Web Site:

Contact Person:

Title:

Phone:

Email Address:

Fax:

Secondary Contact Name:

Secondary Contact Title:

Secondary Contact Phone:

Secondary Contact Email:

Resource Provider Information (Note: If the Resource Provider has not participated in the required before grants can be awarded.)

Application is submitted to one list, a workflow moves it to another list for processing.

TTAG > TTAG Online Application

TTAG Online Application

New ▾ | Actions ▾

TTAG ID	Project Title	Competitive Challenges	Specific Problem	Solution	Implementation Plan	Maintenance Plan
---------	---------------	------------------------	------------------	----------	---------------------	------------------

There are no items to show in this view of the "TTAG Online Application" list. To create a new item, click "New" above.



TTAG > TTAG Submitted Applications

TTAG Submitted Applications

New ▾ | Actions ▾

TTAG ID	Application Status	Company Name	NAICS	Address	City	State	ZIP	County
13-TTAG-068	Pending	InvoTek, Inc.	541712	1026 Riverview Drive	Alma	AR	72921	Crawford
13-TTAG-067	Pending	Rockline Industries	322299	1583 East Mountain Road	Springdale	AR	72764	Washington
13-TTAG-066	Pending	Superior Industries	336399	1901 E Borick Drive	Fayetteville	AR	72701	Washington

Workflow is manually started on an application (... really, a list item)

TTAG > TTAG Online Application

TTAG Online Application

New | Actions | Settings

Copied	TTAG ID	Project Title	ProjectTitle240
Count = 67			
Yes	13-TTAG-068	13-TTAG-068 - Adaptive Hand Cycling for People with Quadriplegia	13-TTAG-068 - Adaptive Hand Cycling for People with Quadriplegia
Yes	13-TTAG-067	13-TTAG-067 Flash Hazard Assessment & Mitigation - Pt 2	13-TTAG-067 Flash Hazard Assessment & Mitigation - Pt 2
Yes	13-TTAG-066	13-TTAG-066 Flash Hazard Assessment & Mitigation - Pt 2	13-TTAG-066 Flash Hazard Assessment & Mitigation - Pt 2

Context menu for 13-TTAG-066:

- View Item
- Edit Item
- Manage Permissions
- Delete Item
- Version History
- Workflows**
- Alert Me

INITIATION FORM
(developed in SPD as part of the workflow design)

TTAG > TTAG Online Application > 13-TTAG-068 - Adaptive Hand Cycling for People with Quadriplegia

Copy Online Application

To initiate Copy Online Application, click Start.

Does applicant have any late reports?:	No
Has the Enterprise received 2 TTAG awards this fiscal year?:	No

Application Description:

SELECT YOUR CHOICE

- 1-Quality Projects
- 2-Lean Projects
- 3-Sustainability
- 4-Growth Services and Product Development
- 5-Strategic/Business Management/Planning Services**
- 6-Advanced Materials and Production
- 7-Agriculture, Food and Environmental Services
- 8-Biotechnology, Bioengineering and Life Sciences
- 9-Information Technology
- 10-Transportation Logistics
- 11-Bio-Based Products

Start Cancel

Workflow Assigns Tasks to Committee Members

Link : 13-TTAG-068 - Adaptive Hand Cycling for People with Quadriplegia (5)

TTAG Reviewer 1 - Initial Review	Blake Perry	Completed	(2) Normal	100%	13-TTAG-068 - Adaptive Hand Cycling for People with Quadriplegia
TTAG Reviewer 2 - Initial Review	Steve Stanley	Completed	(2) Normal	100%	13-TTAG-068 - Adaptive Hand Cycling for People with Quadriplegia
TTAG Reviewer 3 - Initial Review	Tovia Chan	Completed	(2) Normal	100%	13-TTAG-068 - Adaptive Hand Cycling for People with Quadriplegia
TTAG Reviewer 4 - Initial Review	James E Downs	Completed	(2) Normal	100%	13-TTAG-068 - Adaptive Hand Cycling for People with Quadriplegia
TTAG Second Level Review	James E Downs	Not Started	(2) Normal		13-TTAG-068 - Adaptive Hand Cycling for People with Quadriplegia

TTAG > TTAG Tasks > TTAG Reviewer 4 - Initial Review

Title: TTAG Reviewer 4 - Initial Review

Description: Review the new TTAG application and approve/reject.

TTAG Review Committee Approval 4 Status *: application, select whether you are Approving or Rejected.
Approved
Rejected

Comments - TTAG Reviewer 4:

Enter any comments you would like to regarding your review & approval decision for this application.

Related list item:

13-TTAG-068 - Adaptive Hand Cycling for People with Quadriplegia

Save Draft

Complete Task

Cancel

Committee Members are maintained in a list so they can be easily updated.

The workflow pulls information from the list, similar to looking up values from a database table.

TTAG > TTAG Review Committee

TTAG Review Committee

New ▾ | Actions ▾ | Settings ▾

🔗	Full Name	Last Name	First Name	<input type="radio"/> TTAG Person or Group	E-Mail Address	Company
	TTAG Administrator	Administrator	TTAG	ASTA TTAG Administrator	ASTA.TTAGAdministrator@arkansas.gov	ASTA
	TTAG ASTA Reviewer	Ahlen	John	Blake Perry	ASTA.TTAGAdministrator@arkansas.gov	ASTA
	TTAG AMS Reviewer	Curtis	Dan	Blake Perry	ASTA.TTAGAdministrator@arkansas.gov	AMS
	TTAG ASTA Fiscal Officer	Bailey	Cathleen	ASTA SharePoint Administrator	ASTA.SPAdmin@arkansas.gov	ASTA
	TTAG AMS Accounting Supervisor	Rachel	Lee	ASTA SharePoint Administrator	ASTA.SPAdmin@arkansas.gov	AMS
	TTAG Second Level Reviewer	James	Downs	James E Downs	James.Downs@arkansas.gov	ASTA
	TTAG Reviewer 4	Downs	James	James E Downs	James.Downs@arkansas.gov	ASTA

Workflow Processing

- When tasks are completed, the workflow resumes and performs more actions
 - Assigns more tasks
 - Creates documents in a document library using **WORKFLOW VARIABLES**

Workflow creates documents in document library using a template and workflow variables

TTAG > TTAG Warrant Requests

TTAG Warrant Requests

New Upload Actions Settings

Type	Name	Modified	Modified By	Vendor ID	Payee Resource Provider	Mailing Address	City
	13-TTAG-056 - Industrial Hygiene Hazardous Chemical Exposure Survey Phase 1 of 2	2/6/2013 4:05 PM	ASTA SharePoint Administrator	100201283			Little Rock
	13-TTAG-054 - Industrial Hygiene Hazardous Chemical Exposure Survey Phase 1 of 2	2/6/2013 3:57 PM	ASTA SharePoint Administrator	100201283			Little Rock
	13-TTAG-053 -	2/25/2013 3:11 PM	ASTA	100201283			Little Rock

Arkansas Science & Technology Authority
Request for Payment

Requestor: Stephanie Johnson Program: AMS – TTAG Resolution: 12-33

Date: 2/6/2013 Vendor ID: 100201283

Payee (Resource Provider):

Address:

City: Little Rock State: AR Zip Code: 72211

Project: 13-TTAG-056 Payment: Final

Fund:	Fund Center:	Cost Center:	Commitment Item:
NST0900	84W	278302	04

WBS Element:	Amount:
[WBS Element]	\$ 3750

Approvals:

Supervisor:	Date:

EVP:	Date:

FO:	Date:

Reporting on the Data: Export List Data To Excel

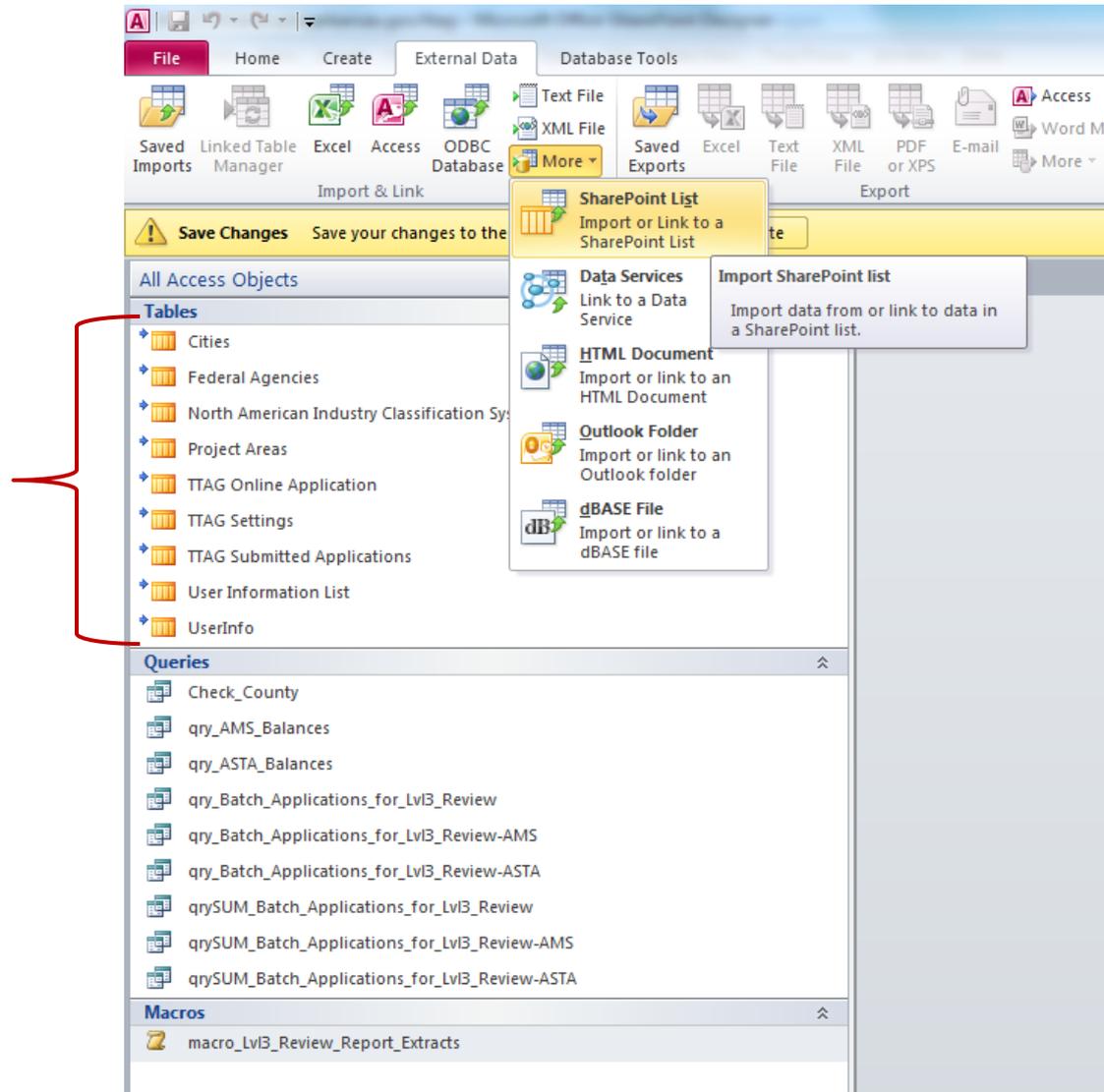
TTAG > TTAG Submitted Applications

TTAG Submitted Applications

TTAG ID	Actions	Settings
13-TTAG-068	 Edit in Datasheet Bulk edit items using a datasheet format.	
13-TTAG-067	 Export to Spreadsheet Analyze items with a spreadsheet application.	
	 Alert Me Receive e-mail notifications when items change.	



Can use MS-Access to link to SharePoint Lists (which work like linked tables in Access)



Reporting tools can be used against the SharePoint data via the Access DB (ex. - Crystal Reports)

The screenshot shows the SAP Crystal Reports interface. The main window displays a report titled "TTAG Funding Recommendations Report - AMS" in the "Preview" view. The report content includes a title, a header, a body with a paragraph of text, and a table. A "Database Expert" dialog box is open in the foreground, showing the "Data" tab. The dialog box lists available data sources and selected tables. The selected tables are "qrySUM_Batch_Application" and "qry_AMS_Balances_".

TTAG Funding Recommendations Report - AMS

Design Preview x Lv3_Review_AMS_Batch_Applications.rpt

Groups
TTAG Funding RH

Database Expert

Data Links

Browse the data source for the tables you want to add.
(Note: to edit the alias for a table, select the table in the 'Selected Tables' tree and click on it or press the F2 key)

Available Data Sources:

- My Connections
 - C:\Exported_Data\TTAGV
 - C:\TTAG-Partial\201002_f
 - C:\TTAG-Partial\201002_f
 - TTAG_DB
 - Create New Connection

Selected Tables:

- C:\Exported_Data\TTAGV\SL
- qrySUM_Batch_Application
- C:\Exported_Data\TTAGV\AM
- qry_AMS_Balances_

OK Cancel Help

**The Technology Transfer Assistance Grant Program
AMS Funding Recommendations**

To: Authority President, AMS Director

From: TTAG Program Review Committee

Date: 1/30/2013

RE: Technology Transfer Assistance Grant Program Funding Recommendation

The Technology Transfer Assistance Grant (TTAG) Program Review Committee recently evaluated several application(s). After reviewing the TTAG applications, the Committee chose to recommend the following project(s) for funding consideration. If the following are approved, there will be a remainder of **\$91,250.00** of AMS TTAG Funds.

Assisted Enterprise	SBR/STTR	Provider	Funds Requested
Wabash Wood Products, Inc. Harrison	AR	SET Environmental	\$ 3,750 for: 7-Agriculture, Food and Environmental Services
13-TTAG-055			

The applications were reviewed for compliance with Executive Order 98-04 and found to comply. If you have any questions concerning specific issues related to these projects, do not hesitate to ask. Please let me know of your funding decision as soon as possible, so that I can request the warrants.

EXAMPLE:

Board of Directors Site

- Utilizes:
 - Document Library
 - iPad App: Colligo Briefcase Pro
 - Synchronizes SharePoint content to iPad

Has completely eliminated the need for printed board materials, reducing both time and cost

Our board loves it!

Board site is just a simple team site with a document library:

ASTA > Board of Directors Welcome ASTA SharePoint Administrator



All Sites ▼

Home

[View All Site Content](#)

Documents

- Shared Documents

Lists

- Calendar
- Links

Sites

[People and Groups](#)

[Recycle Bin](#)

Announcements

There are currently no active announcements. To add a new announcement, click "Add new announcement" below.

■ [Add new announcement](#)

Calendar

There are currently no calendar items to display. To add a new item, click "Add new item" below.

■ [Add new item](#)

Board of Directors > Shared Documents

Shared Documents

[View All Site Content](#)
[New](#) [Upload](#) [Actions](#) [Settings](#)

Type	Name	Modified
Folder	March 2013	3/1/2013 1:04 PM
Folder	Previous Meetings	1/14/2013 3:52 PM

Board of Directors > Shared Documents > March 2013

Shared Documents

[View All Site Content](#)
[New](#) [Upload](#) [Actions](#) [Settings](#)

Type	Name	Modified
Folder	Industry Committee	3/1/2013 1:05 PM
Folder	Research and Commercialization Committee	3/1/2013 1:05 PM
Folder	Sponsored Projects Committee	3/1/2013 1:05 PM
Document	Draft Agenda	3/1/2013 1:12 PM
Document	Jan2013 Minutes	3/1/2013 1:12 PM



There are currently no favorite links to display. To add a new link, click "Add new link" below.

Next: The iPad Board App

“Board App” = Colligo Briefcase Pro

- What is the Board App?
 - An app that allows you to synchronize the Board packet to your iPad for offline viewing
 - Back end is the same SharePoint site you already use today to access the Board packet.

How does it work?

From the home screen, tap the *Briefcase Pro* icon



If you set a passcode when configuring the app, enter it on the next screen.



If the app does not automatically sync when first opened or the “Last Sync” date is not today, press the sync button.



Press to sync

Manually sync if last sync is not today's date

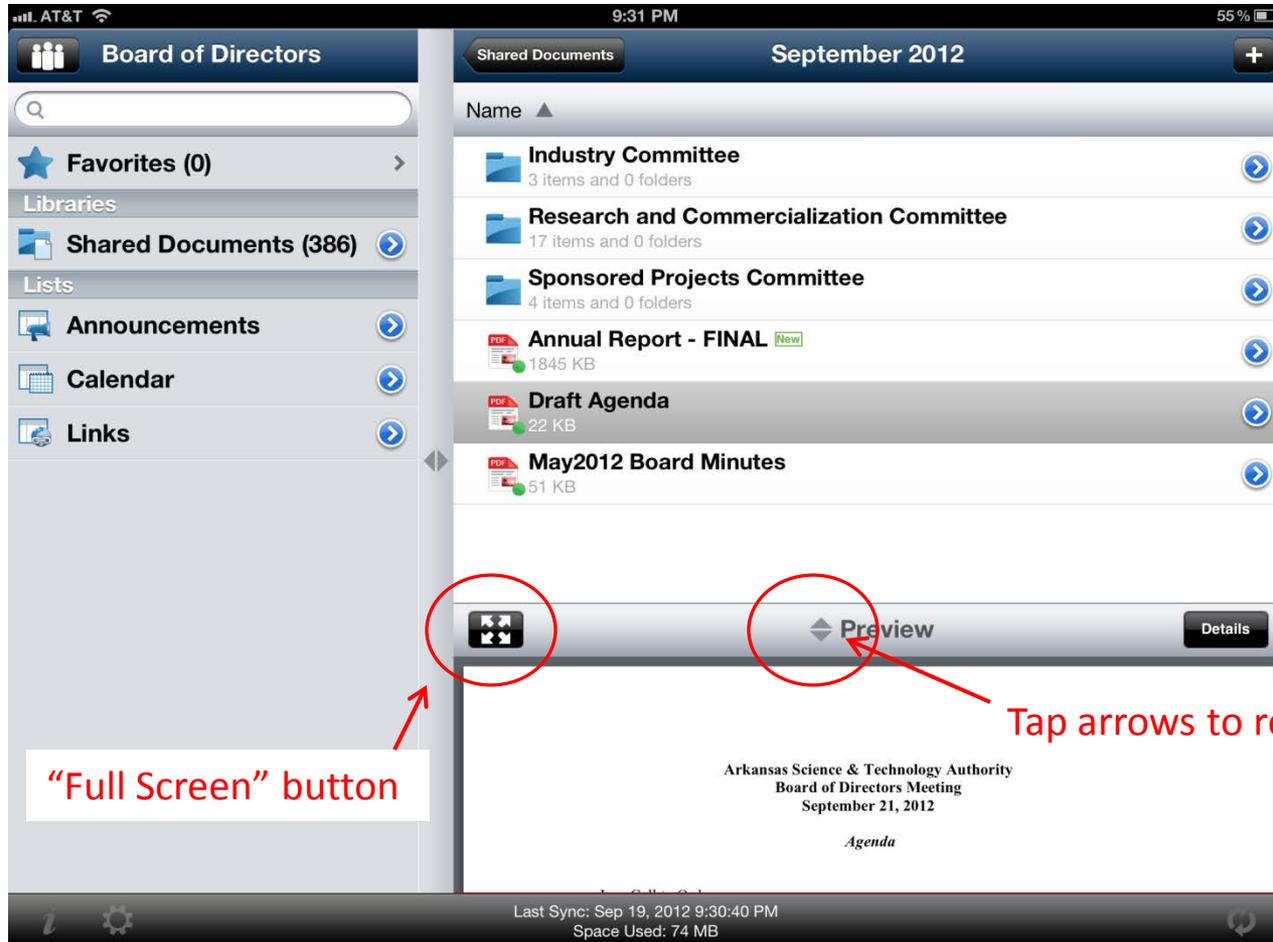
“Sync Progress” window appears during sync



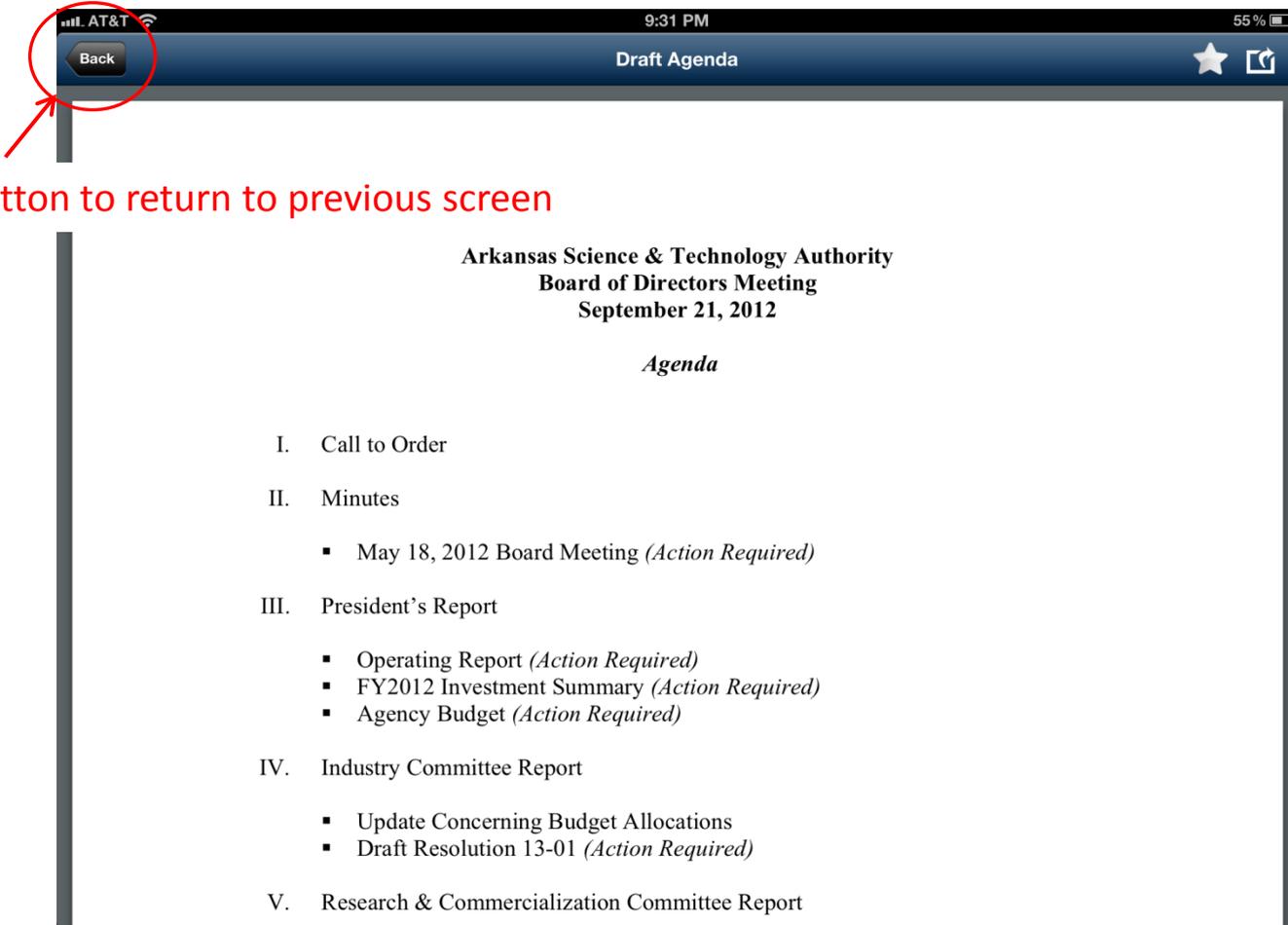
Click “Close” button when Syncing shows as “Complete”



Click “Shared Documents”, then tap any document to preview it



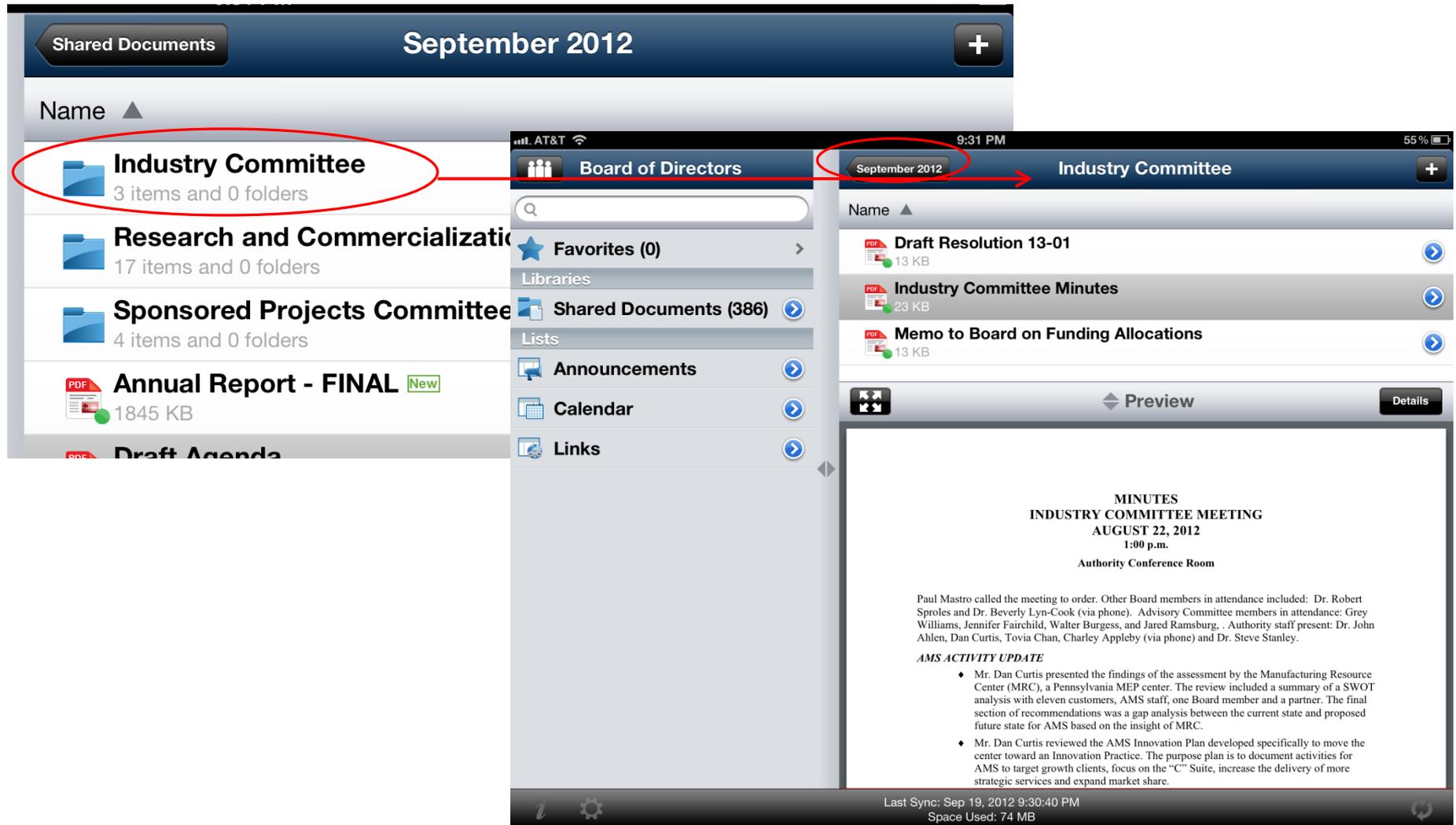
Tap “Full Screen” icon
(NOTE: Documents open full screen if the preview window is not open)



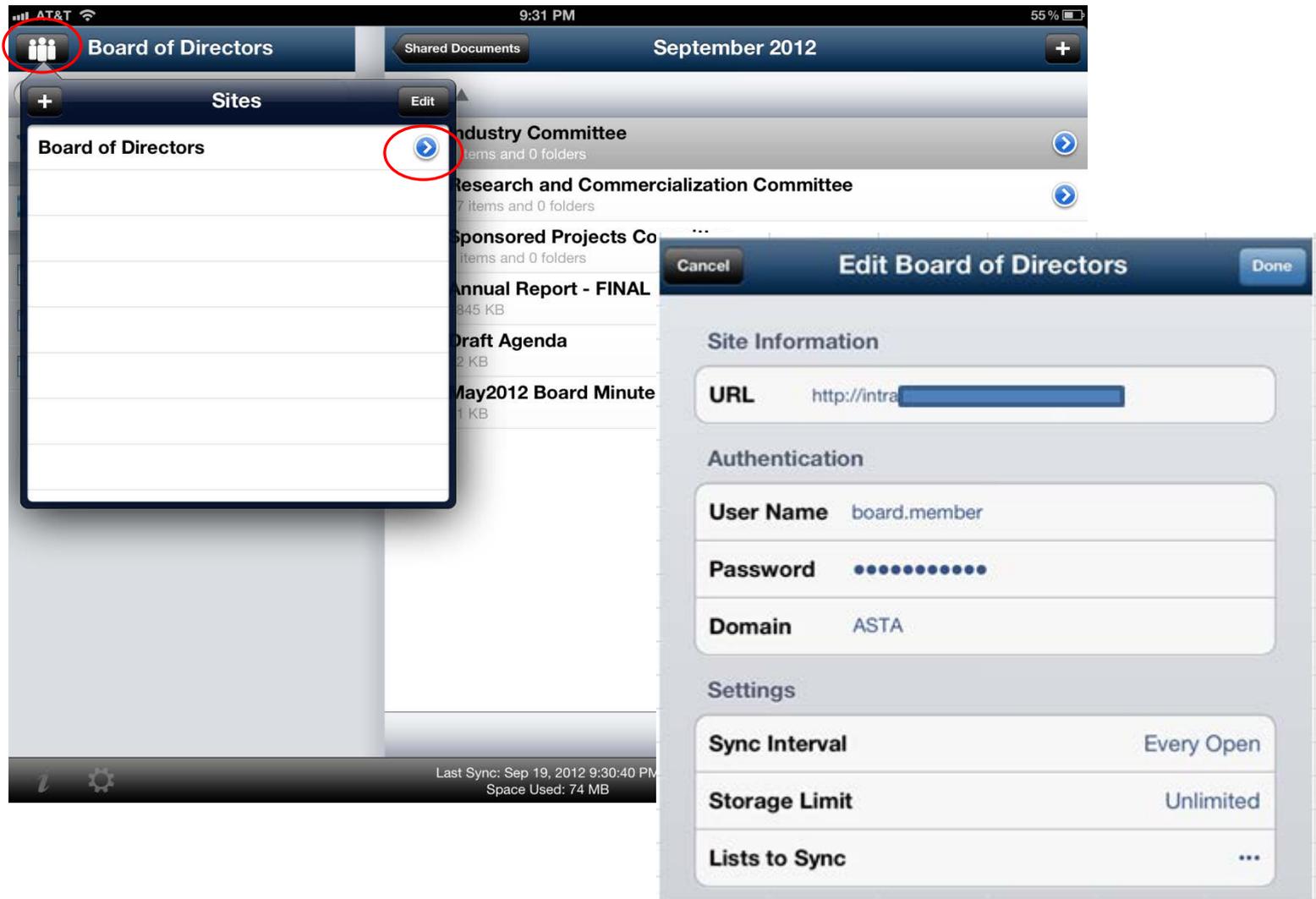
Tap “Back” button to return to previous screen

Tap a subfolder to open it.

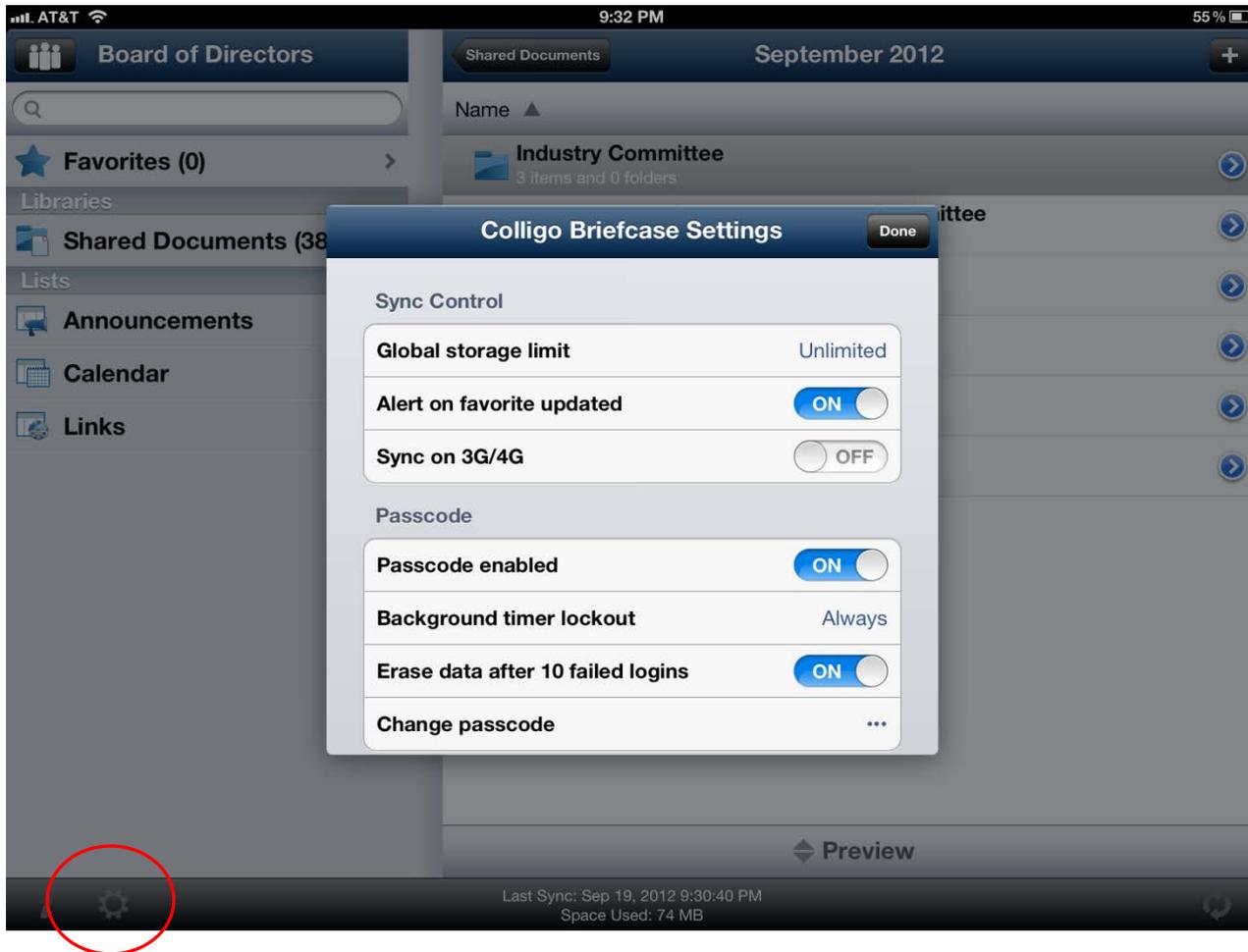
Tap the back button to return to the previous level.



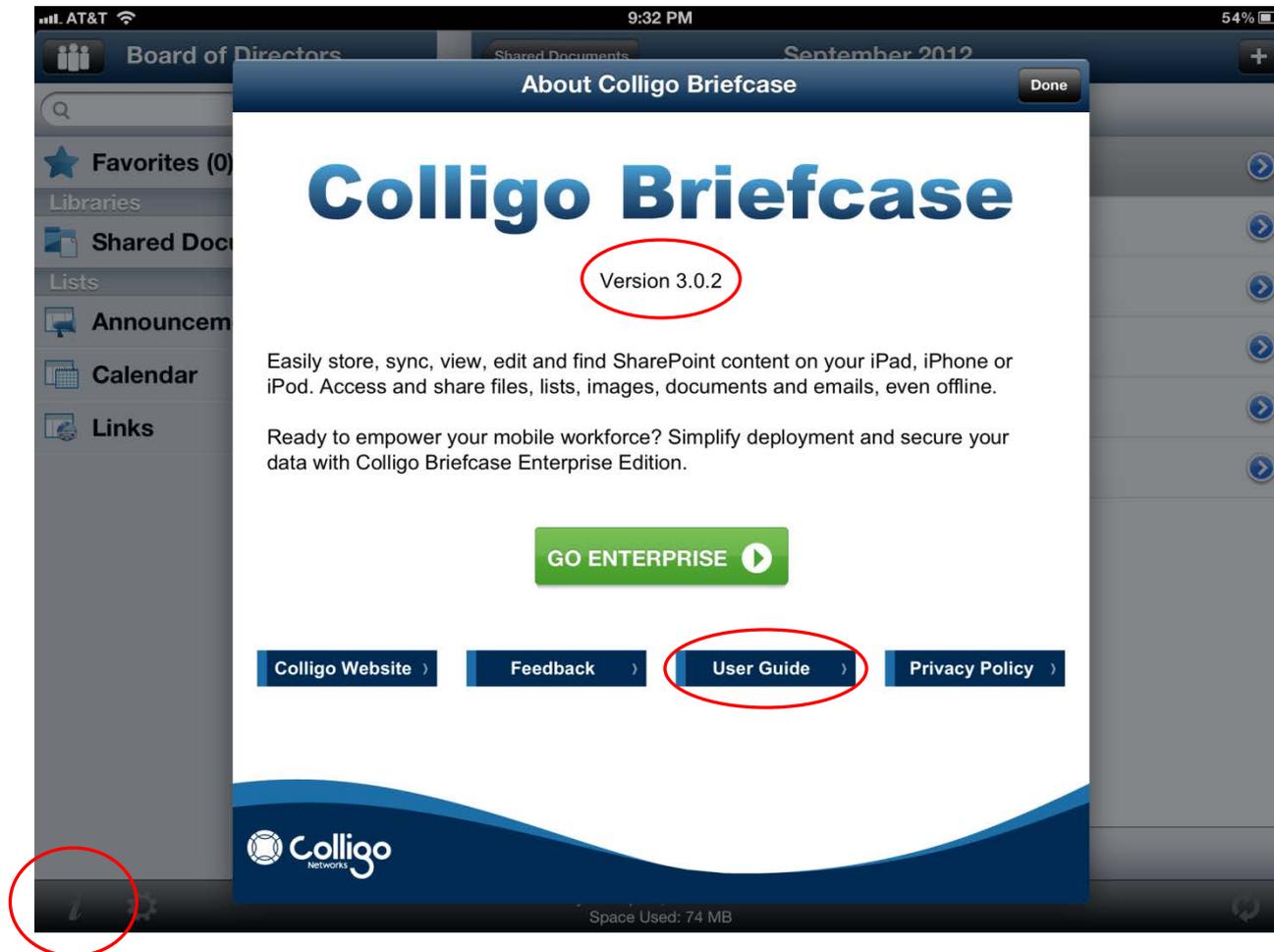
To Access Site-Level Settings: Tap 3 People Icon, then Blue Arrow



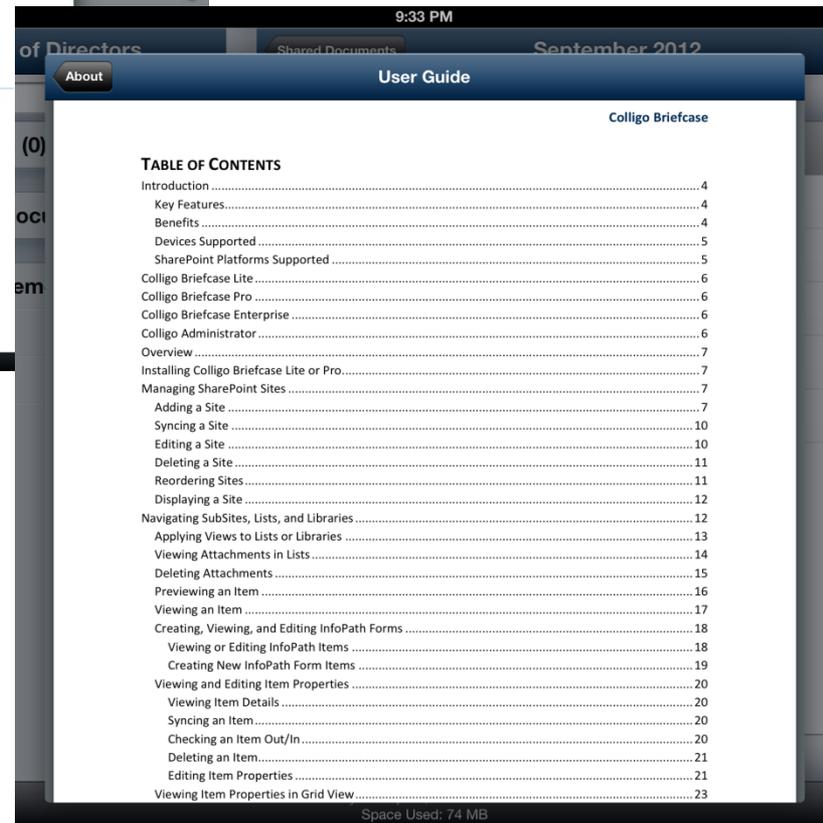
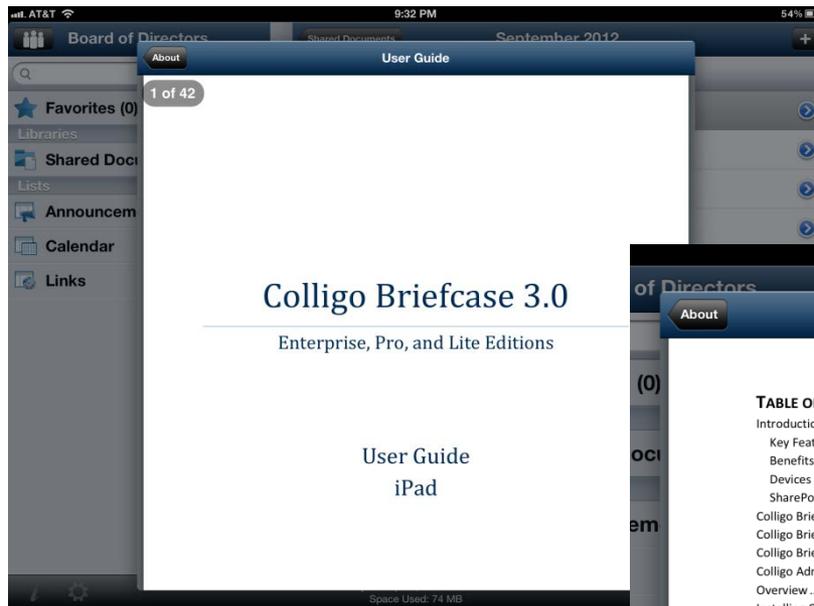
To Access Global App-Level Settings, Tap Gear Icon in Lower Left



To access the app's version number or the in-app user guide, tap the "i" Information icon in the lower left.



NOTE: The in-app user guide is extensive and contains some advanced features we do not use at this time.



LIVE DEMO OF BOARD APP

