



## State Agency Streamlines Processes, Lowers Costs, with Consistent Desktop Environment

### Overview

**Country or Region:** United States

**Industry:** Government

### Customer Profile

The Illinois Department of Commerce and Economic Opportunity (DCEO) works to make Illinois businesses more competitive in the global economy. The agency employs 550 people.

### Business Situation

DCEO faced integration and collaboration challenges with respect to its mixed IT environment. The agency also struggled with an inefficient, paper-based approach to its grants process.

### Solution

DCEO deployed Microsoft® Office Professional Plus 2007 agencywide, developed an Office Business Application that automates grant administration, and has redefined its collaboration infrastructure with Microsoft Office SharePoint® Server 2007.

### Benefits

- Increased productivity and collaboration
- Greater accessibility and transparency
- More compelling presentations
- IT costs down U.S.\$1 million yearly
- Demonstration of technology leadership

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Terry Lutes, Chief Information Officer, State of Illinois Department of Commerce and Economic Opportunity

For years, the Illinois Department of Commerce and Economic Opportunity (DCEO) used a multivendor, partly mainframe-based IT environment. Seeking to improve productivity and streamline processes, the agency implemented the 2007 Microsoft® Office release, including Microsoft Office SharePoint® Server 2007. In addition, the agency deployed a simple, customized user interface and a powerful Office Business Application that provides access to a vital line-of-business solution. Now, office-based and mobile employees alike can access and track documents far more easily, the agency’s grant-approval process is more efficient and provides greater accountability and transparency, agency presentations are more professional and compelling, and IT costs are down by more than U.S.\$1 million yearly. Moreover, the agency is now viewed as a technology leader by other governmental entities.



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## Situation

The State of Illinois Department of Commerce and Economic Opportunity (DCEO) is responsible for improving the competitiveness of Illinois businesses in the global economy. Working with private companies, other government agencies, individuals, and families, DCEO administers economic and workforce development programs, services, and initiatives designed to create and retain high-quality jobs and build strong communities.

For some time, DCEO had relied on disconnected silos of technologies from different vendors to meet its IT needs, technologies that included several mainframe-based line-of-business applications. Eventually, however, collaboration challenges led the agency to consider simplifying and unifying the entire IT environment to facilitate not only collaboration but also process automation.

Specifically, agency executives wanted to improve business processes by modernizing the agency's core directory, server, and e-mail infrastructure, and by migrating key applications from the mainframe. The executives felt that providing employees with better access to information—and to one other—would boost productivity and morale, particularly for the more than half of all employees and associates who work in a mobile setting or at the agency's branch and remote offices. In addition, department heads wanted to automate the administration of small business grant programs, which are central to the agency's mission.

On a more day-to-day level, department heads and managers wanted to help employees build more compelling presentations, which are essential in securing funding. And, as in any other organization that depends on taxpayer dollars, these managers wanted to reduce IT costs wherever possible.

To do all this, DCEO enlisted more than a dozen contractors as well as new Chief Information Officer Terry Lutes, who acknowledged the scale and scope of the job before him. “Everyone said it couldn't be done,” he says. “But that didn't stop us.”

## Solution

Lutes and his team determined that the best technology for addressing these challenges was in the 2007 Microsoft® Office release, including Microsoft Office SharePoint® Server 2007. “For the agency in general and the grants process in particular, we wanted to reengineer basic business applications so as to create a fully integrated environment,” he says. “When we saw the way everything worked together in Office 2007 and SharePoint Server 2007, and the possibilities for automating the grants process through OBAs [Office Business Applications], we felt that Microsoft really got it right.”

### Phased Rollout Eases Transition

Prior to installing the new solution, DCEO IT executives put a lot of thought and energy into creating acceptance among employees, according to Deborah Fleming, Portal Administrator at DCEO. “It was very important for us to make a big splash with the Office 2007 introduction, to generate a lot of excitement,” she says.

In mid-2007, DCEO rolled out Microsoft Office Professional Plus 2007 to employees of the entire agency in just three weeks, and deployed Microsoft Office SharePoint Server 2007 immediately afterward on a bureau-by-bureau basis. As Fleming explains, the agency followed a two-phased approach to the Office 2007 deployment: delivering the product first to a 100-person pilot group of IT staff and other power users, and then to the agency's remaining 450 employees. “Because the Office 2007 user interface was so different from that of Office 2003, we

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Deborah Fleming, Portal Administrator,  
Illinois Department of Commerce and  
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Figure 1: DCEO created an Office Business Application by customizing the Fluent user interface in Office Outlook 2007 to give employees one-click access to the company's intranet, bureau site, office directory, eGrants solution, and several Office 2007 programs.

wanted to build momentum toward rapid acceptance,” Fleming explains. “So we deployed and trained the super-users first, with half-day classes on 2007 versions of the Office Outlook®, Word, and Excel® programs and the Office Fluent™ user interface. These super-users, in turn, eased the transition for other employees, whose desktops were upgraded with the help of Microsoft Systems Management Server 2003 while they attended a three-hour, high-level training session in our theater, where we answered questions about the Ribbon. Once everybody saw it, they ‘got it.’”

To further smooth the transition, Fleming and her colleagues created a SharePoint-based Help site that provided easy access to online tutorials from Microsoft. “Employees liked the Office 2007 tutorials so much that I would often hear them playing as I walked around the office,” she says. “The most popular by far was the interactive guide clarifying the command differences between Office 2003 and Office 2007. It was especially handy that the guide comes free of charge.”

#### **Built-in Tools Help Team Members Get Up to Speed Rapidly**

To help team members make the most of the productivity advantages offered by Office 2007, the agency installed the Get Started tab, also free of charge, in Word 2007 and Excel 2007 and customized the Office Fluent user interface in the Microsoft Office Outlook 2007 messaging and collaboration client for easy and direct access to all internal DCEO solutions, documents, and data. This unified and consistent user interface is available to all DCEO employees, whether they are

working on desktop or mobile systems, and whether they are working from one of the agency's main offices in Chicago and Springfield, Illinois; in one of its other offices in 11 cities throughout the United States; or out of Europe, Asia, or Africa.

In addition to building the customized user interface, DCEO developers created eGrants, an application for automating the agency's grants process. The application uses the Office 2007 Professional Plus suite, OBA Services, Microsoft Office InfoPath® 2007 information-gathering program, and Office SharePoint Server 2007. DCEO developers created the eGrants solution using the Microsoft Visual Studio® 2005 development system and Visual Studio 2005 Team Foundation Server, and installed it with the help of Microsoft Systems Management Server 2003, for a deployment that, according to Fleming, went smoother and faster than previous such projects.

#### **Benefits**

With some 550 seats deployed on 2007 Office for more than a year, DCEO is reporting significant benefits in terms of productivity, process improvement, and cost reduction. The highly integrated nature of the solution is also helping DCEO to set an example for other government agencies throughout the state. “I've done software rollouts for more than 30 years, and this was the first time I was able to achieve the vision of a fully integrated solution,” Lutes reports. “Microsoft really got it right with Office 2007 and SharePoint Server 2007.”

#### **Customized User Interface Increases Productivity**

With the customized interface in Office Outlook 2007, DCEO employees are accessing the solutions, documents, and data they need more conveniently than ever before. For example, employees can access Office 2007 programs, directories, portals,



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homegrown applications, and legacy applications from a single drop-down list. In addition, all files are automatically saved to individual My Site locations, an arrangement the agency established through the integration of Office 2007 and Office SharePoint Server 2007.

“No longer are employees wasting otherwise productive time searching for files or data,” Lutes says. “This boosts overall productivity and accountability and expedites decision making.”

### **Integrated Technologies Promote Collaboration**

Mobile employees at DCEO are among those benefiting the most from the Office 2007 and Office SharePoint Server 2007 deployment, thanks to the comprehensive integration between these technologies. The employees are taking advantage of shared calendaring and document workspaces to more easily collaborate with their office-based colleagues. For example, mobile employees can modify items offline and then have them automatically pushed back to the SharePoint site, eliminating the need for manual sharing of documents and calendar information.

Similarly, mobile employees are using Outlook shared contacts integrated with Office SharePoint Server 2007. With this capability, these employees can be confident that any edits they make to shared contacts will be automatically pushed to other team members the next time connectivity is established.

### **Slide Libraries, SmartArt Simplify, Enhance Presentations**

Microsoft Office PowerPoint® Slide Libraries are yet another capability that mobile and office-based DCEO employees are taking advantage of, thanks to the integration of Office 2007 with Office SharePoint Server 2007. As Lutes explains, the libraries are

becoming very popular at DCEO, which provides hundreds of such presentations yearly.

“As a public entity, we depend heavily on the power of persuasion, and so we deliver a lot of PowerPoint presentations to industry, community, and other constituent groups,” Lutes says. “The teams responsible for these presentations like the accessibility and convenience of the PowerPoint Slide Libraries so much that they have begun using them on their own, without the need for any IT involvement.”

DCEO employees responsible for presentations also are using the SmartArt® graphics in PowerPoint. “The employees who create these presentations fell in love with SmartArt the minute they saw it,” Fleming reports. “Now they are using SmartArt to create more professional and compelling presentations in almost no time whatsoever.”

### **Automated Solution Supports Accountability, Transparency**

According to Fleming, the greater productivity and accountability offered by Office 2007 is nowhere more apparent than in the eGrants solution. With this solution, the agency has incorporated 83 separate grant programs into a single InfoPath form that, through integration with Office SharePoint Server 2007, triggers a workflow including an e-mail broadcast to everyone involved with a given grant.

“The agency has moved a process that had been almost exclusively paper-based to one that is now fully automated using out-of-the-box workflow features in SharePoint Server 2007,” Fleming says. “The resulting advantages in efficiency are huge.”

For example, every business applying for a DCEO grant currently does so through a public eGrants portal, and once that

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Figure 2: DCEO integrated Office SharePoint Server 2007 workflow capabilities with Office Outlook 2007 to power its eGrants solution.

business’s application is approved, a private portal is created for it. From that point forward, the business interacts with DCEO solely through the private portal. Any documents that happen to come to the agency in paper form are scanned into a customized Xerox WorkCenter application that takes advantage of Office SharePoint Server 2007 workspaces.

“By having the entire set of relevant documents available through the workspaces, the grant process is easier and more transparent for all involved,” Fleming says. “It is also a lot more efficient, as about a dozen fewer staff members are now working directly on approvals, and yet the approvals are moving as fast, or faster, than before.” Lutes adds that executives who are responsible for grant approvals are particularly pleased with the thorough integration of eGrants with the various Office 2007 programs, including Office Outlook. “Everything executives need for grant approval is available through their Outlook inbox,” Lutes says. “DCEO executives based

overseas are granting approvals from offices in France or Ireland or wherever, without having to wait until returning to the home office, as they did before we deployed the eGrants solution. Consequently, the businesses involved can know whether their grant was approved weeks or even months faster than they did before.”

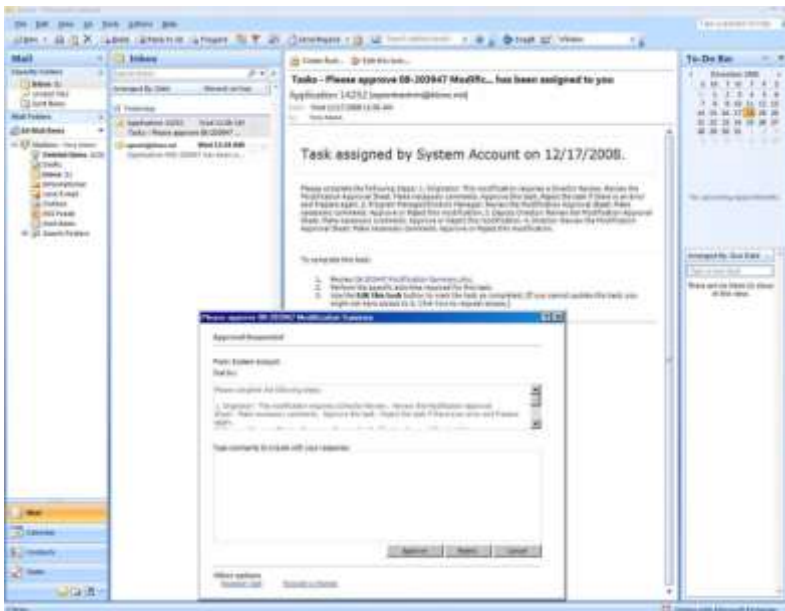
Even better, the grants process is fully transparent, which is vital for a public agency responsible for distributing taxpayer money and, therefore, subject to multiple document retention and archival compliance requirements.

“Now, on virtually a moment’s notice, the agency can turn over the contents of any given grant application or approval to auditors, and everything is there,” Lutes says. “Making the grant process faster, easier, and more transparent helps us to track the impact of grant funding on Illinois businesses. It also helps boost morale for employees, citizens, and all our constituents.”

### Uniform Environment Lowers IT Costs

On the IT side, DCEO is finding that a virtually 100 percent Microsoft environment is helping to reduce support requirements. For example, since deployment, DCEO has tracked a 35 percent reduction in help-desk calls as compared with the agency’s prior environment, for an annual savings of \$250,000.

IT maintenance costs are down too, by some U.S.\$800,000 per year, such that maintenance represents just 12 percent of the agency’s overall IT costs. “This is all the more impressive considering that other agencies are spending large sums on IT maintenance,” Lutes points out. “These savings enable us to devote more money to more impactful pursuits, such as developing solutions like eGrants.”



## For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: [www.microsoft.com](http://www.microsoft.com)

For more information about the State of Illinois Department of Commerce and Economic Opportunity, visit the Web site at: [www.ildceo.net](http://www.ildceo.net)

## Holistic Approach Demonstrates IT Leadership

Looking to the near future, Lutes, Fleming, and their colleagues are making increasing use of Office Excel 2007 report customization and conditional formatting, Excel Services, Office SharePoint Server 2007 presence awareness and offline files, and comprehensive forms automation. According to current plans, all these capabilities will be implemented agencywide by late 2009.

With these initiatives, on top of the implementation of Office 2007 and Office SharePoint Server 2007 and the development and deployment of the eGrants solution, DCEO is setting an example for other Illinois state agencies of how to use what Lutes calls “a holistic approach” to IT modernization.

“The top IT executive in the state government has spoken very favorably of what we’ve done, and we’re already preparing to help with similar projects at other state agencies, such as the Illinois Department of Transportation and the Illinois Department of Natural Resources,” Lutes says. “It seems that everyone who’s familiar with what we’ve done with Office 2007 and SharePoint Server 2007 wants to do the same thing.”

## Microsoft Office System

The Microsoft Office system is the business world’s chosen environment for information work, providing the programs, servers, and services that help you succeed by transforming information into impact.

For more information about the Microsoft Office system, go to: [www.microsoft.com/office](http://www.microsoft.com/office)

### Software and Services

- Microsoft Office
  - Microsoft Office Professional Plus 2007
  - Microsoft Office SharePoint Server 2007
- Microsoft Server Product Portfolio
  - Microsoft Systems Management Server 2003
- Microsoft Visual Studio
  - Microsoft Visual Studio 2005
  - Microsoft Visual Studio 2005 Team Foundation Server
- Technologies
  - OBA Services