BETTER TOGETHER:

MOBILIZING YOUR ENTERPRISE WITH SHAREPOINT AND COLLIGO ENGAGE

Microsoft   colligo

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OPENING – MIKE HILTON

It is my pleasure to be asked to write the forward for this eBook. My name is Mike Hilton and I am a Director for Partner Business Evangelism here at Microsoft Canada. Microsoft is an amazing company for a few reasons. One of them is we are the leading productivity and platform company today, for a mobile first, cloud first world. While I admit I am a little biased, I am backed up by some industry giants. Aberdeen reports that 80% of Fortune 500 companies are using Microsoft cloud, while Gartner has Microsoft products listed in the leader's quadrant across almost every sector. When it comes to any business – from SMB through to Enterprise – it is hard not to find Microsoft at the core of how organizations use technology to transform their operations.

PARTNERS MAKE MICROSOFT BETTER

The other reason Microsoft is pretty awesome is that we have a global partner community – likely the largest partner eco-system of any technology company in the world. Why is this important? Because partners extend what Microsoft can do. Partners are building incredible business solutions that make Microsoft software even better. It is like having a global brain trust of authorities and subject matter experts who are collaborating to deliver cloud and on-premises solutions that enable you to choose from a vast array of applications, to take the right digital transformation journey for your organization.

Microsoft CEO Satya Nadella shares his vision for partners and customers in this short 1 minute video.

REINVEST IN YOURSELF – REINVEST IN YOUR SHAREPOINT

In this eBook, you are going to learn how one of our most widely adopted and accepted software technologies – SharePoint – can become even better by extending it with the award-winning capabilities of Colligo. If you need to share information more intelligently; if you want to improve governance and audit trails for the content your teams consume; if empowering your employees to be greater and do greater things is part of your vision; if you have standardized on Share-Point and now want to add rocket-fuel to its capabilities, then this eBook is for you.

SHAREPOINT FOR IT / SHAREPOINT FOR BUSINESS

SharePoint has long been loved by IT teams for its secure and robust capabilities as both a departmental or enterprise repository. Microsoft also developed Enterprise Mobility Suite (EMS) to help IT teams establish governance and best practice around management and access for devices, data and applications. However, while EMS solves some big governance and audit challenges for the IT teams, it does not extend that same capability into the governance and audit challenges needed by business units and line-of-business leaders, and to move beyond Mobile Device Management to also include Mobile Content Management.

COLLIGO AND MICROSOFT – BETTER TOGETHER

That is where Colligo comes in. Colligo makes SharePoint better by adding new governance, audit and reporting functionality to support various business scenarios. There are three use cases that we see over and over, where Colligo is helping companies transform their operations and empower their employees:

Mobile Collaboration – Colligo Engage provides mobile workers with single 'pane of glass' access to SharePoint, Office 365 and OneDrive for Business content – both online and offline – with super-easy-to-use apps that boost collaboration and productivity.

Document Distribution – Centralized administrative tools allow IT to push the right SharePoint content, metadata and policies across devices to improve information governance.

Email Management – Colligo Engage empowers information workers to view, tag and file emails and attachments in SharePoint, Office 365 and OneDrive for Business with apps for Outlook and iOS (now in alpha) that enable email records management.

Colligo also protects corporate IT policies because SharePoint admin rights aren't required by the business users to have these powerful SharePoint extensions. It also means a much better ROI story for your SharePoint investment because it can be implemented in just a few days, with very few resources needed from IT to make it all happen. In this eBook, we will share the top 7 Ways that Colligo takes your SharePoint to the next level.

And we'll tell you a couple of stories about customers that have learned that Colligo and Microsoft really are "better together". We include a short assessment quiz you can take to see if Colligo is right for you.

Finally, we provide you with a link to get "five free licences" and begin engaging with Colligo today.

Ready to go?

Enjoy the read.

MIKE HILTON
Director,
Partner Business Evangelist
Microsoft Canada

THE NEW WORLD OF MOBILITY

Jim Tofino has a problem. As the VP of Operations for a manufacturer of specialty foods, he relies on a global distribution network to package and resell his company's products in markets around the world. It means complying with strict regulatory food and safety requirements that vary from country to country.
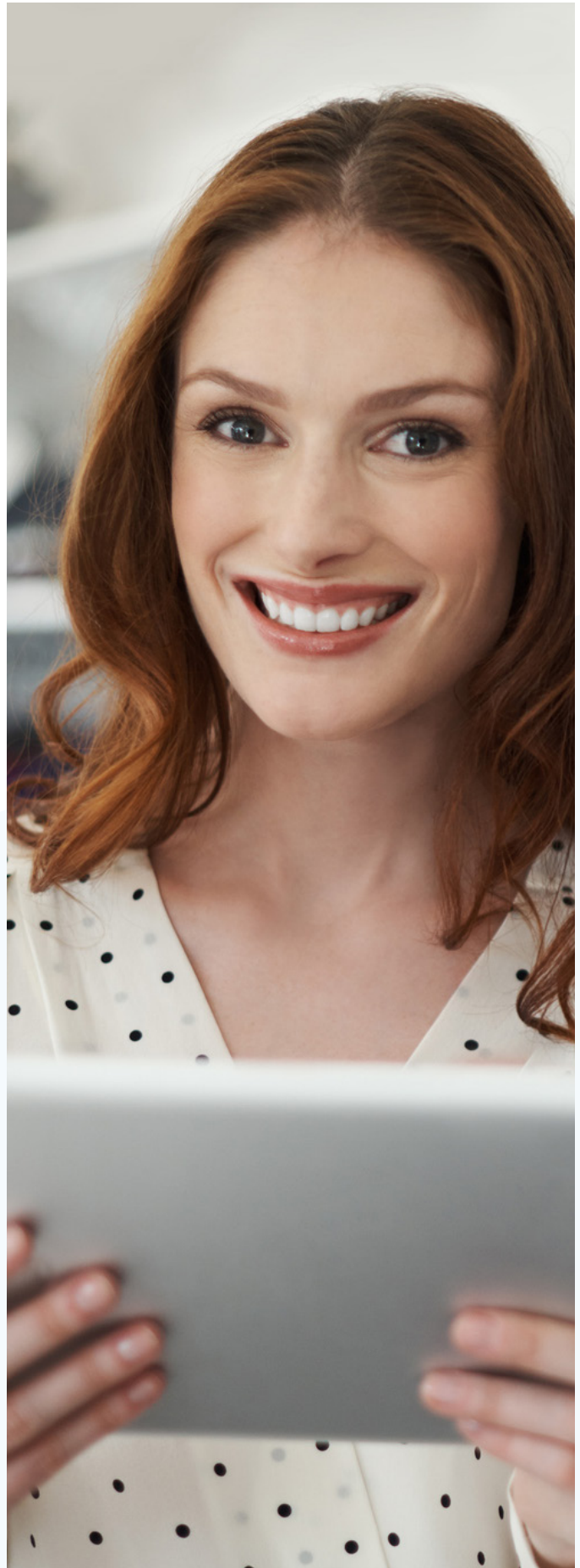
But his compliance mandates have to extend beyond the actual factories and local distribution outlets to include independent truckers and small stores. Penalties for non-compliance are stiff, and failure to meet specific food safety standards puts consumers at risk.

It means delivering the right information to the people who need it, when they need it.

A PERFECT OPPORTUNITY FOR MOBILITY

Smart phones and tablets are everywhere these days. Relying on mobile devices to support the distribution of information seems simple, but the solution is complex. Not only do the compliance requirements change frequently, there is also a need to provide regulators with reports and audit trails that confirm every individual along the supply chain is consuming the information.

It demands a sophisticated mobile solution that can accommodate change as it happens.

ENTERPRISE MOBILITY SPAWNS COMPLEXITY

While multiple forces have come together to make enterprise mobility a reality, they bring more complex challenges that are critical to business success. From supporting field teams to unlocking mobile productivity for entire organizations, today's collaborative enterprise leader must:

1. Provide governance across multiple technologies and workflow requirements;

2. Maintain security while managing risk; and,

3. Ensure that the shift to mobile delivers on productivity.

WHAT MOBILE WORKERS WANT

We all know that today every worker is mobile. A mobile strategy is no longer a nice-to-have, it's a must-have. Recent research provides insight into the needs of mobile workers:

- Workers want to be connected to work systems and their content no matter where they are.

- They also want **a unified view into their content** no matter which device they're on. So they don't want to have access to some content on their office desktop and different content on their iPhone.

- Workers also want to **use their own devices** because there's nothing new to learn and they can be immediately productive.

- This means there's more and more **pressure** on organizations **to support BYOD strategies.**

- Finally, users have no patience for complicated legacy software. They want and expect **simplicity**. Organizations need to provide **easy-to-use apps and processes** to promote user adoption.

MOBILE MANAGEMENT, COMPLIANCE AND DATA SECURITY

According to AIIM's latest SharePoint report, The Impact of SharePoint – 2016, 72% of survey respondents show no support for mobile device use with their SharePoint implementation. This represents a major opportunity for growth.

As report author Bob Larrivee (who's also Vice President and Chief Analyst of Market Intelligence at AIIM International) points out, "This is an area of great opportunity for business organizations to maximize the return and value of their SharePoint systems, by extending SharePoint capabilities and process engagement beyond corporate walls. Mobile device use will improve productivity and operational efficiency, enabling employees, partners, and suppliers to interact on an everywhere, anytime basis."

While anywhere-productivity benefits the enterprise, the demands of today's workforce also pose threats. Key enterprise considerations include:

- **Managing records on various mobile devices –** Not only is there a challenge to control content for each worker's particular device, but each worker uses multiple devices on any given day.

- **Preventing data loss –** More devices automatically means more risk for lost hardware, but also leakage of data by unauthorized access to content.

- **Meeting compliance –** Enforcing compliance to corporate policies on untethered devices is a bigger challenge than on devices always connected to the network. Plus, the ability to monitor and audit activity through those devices is critical for understanding if users are complying.

- Many organizations want to **keep content in place** on enterprise systems like **SharePoint** to maximize their utilization and leverage existing records management processes and security protocols.

EXTENDING THE VALUE OF SHAREPOINT

In our opening scenario, Jim Tofino was looking for a sophisticated solution to manage a complex problem.

He didn't have to look far.

Jim's organization had standardized on Share-Point as a document repository. Because most of the compliance documents were created, up-dated and stored in SharePoint, Jim simply had to find a way to deliver those documents out to a variety of mobile devices, in real time. He also had to ensure that he could manage workflows, monitor usage and report on compliance and consumption.

He also wanted to control the "push" of the documents. Relying on a busy trucker in a remote corner of the world to log-in and search for the latest update was not going to work. The right information had to be delivered to that trucker at the right time.

Because Jim's organization was using SharePoint with EMS, Jim didn't have to worry about user access, app or device management; IT had that covered. Jim simply had to set up policies, proce-dures and controls around the governance of his business content and compliance mandates. A perfect marriage of IT and business governance working together by leveraging the power of SharePoint with Colligo.

COLLIGO ENGAGE

For enterprises that have standardized on SharePoint, Colligo Engage is an ideal extension that provides line-of-business departments with powerful tools to automate, push, monitor, track and report on document access and usage.

It is all accomplished from the Colligo Engage console. Which means business users don't need SharePoint admin rights — a relief for both IT and the business.

Check out the seven reasons why Colligo Engage and SharePoint are better together.

SHAREPOINT WITH COLLIGO ENGAGE CAN MITIGATE MOBILITY RISK

In IDC's 2016 Mobile Enterprise Devices, Security, Services and Solutions Survey, they reported that 48% of enterprises are not seeing the expected cost savings with their mobility projects.

But that is not stopping mobility projects from moving forward — 65% of enterprise organizations plan to increase their mobility spending over the next year, with a heavy emphasis on purchasing mobile devices for employees, as well as application security and content security solutions.
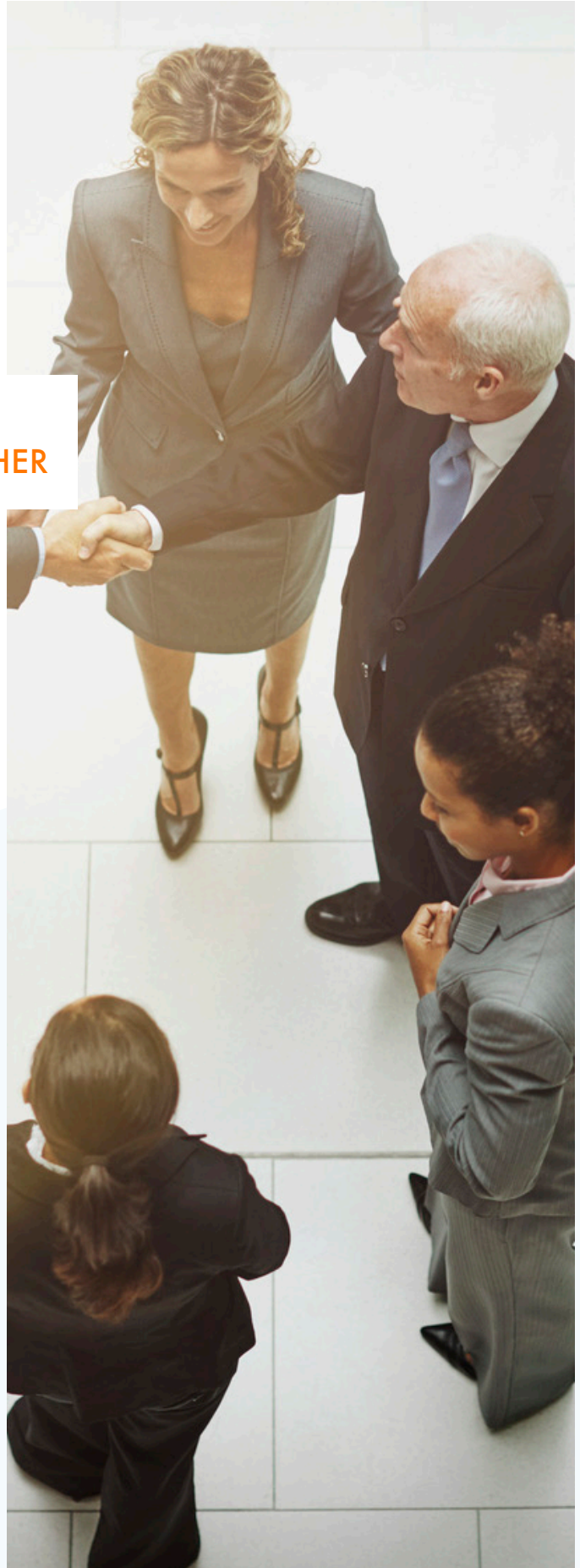
"Cost savings and security risk mitigation are the biggest drivers of mobile device deployment strategies," said Bryan Bassett, research analyst, Mobile Enterprise: Device Solutions at IDC. "But with 48% of enterprises not seeing improvement in their BYO cost savings and 30% citing security problems with mobile app deployments, IT management must inspect strategies for improvements."

Accordingly to Barry Jinks, Colligo President & CEO, one strategy proven to be successful is to leverage SharePoint. "For enterprises that have standardized on SharePoint, Colligo Engage is a natural extension. It can be implemented in only a few days, so the project investment is minimal, and it is governed by SharePoint's security and EMS policies. Colligo Engage then enables the business to implement sophisticated mobile solutions that add governance, workflows, auditing, compliance and reporting that line-of-business demands for operational excellence."

THE TOP 7 WAYS COLLIGO AND SHAREPOINT ARE BETTER TOGETHER

The following seven use cases illustrate how Colligo Engage can enhance your SharePoint platform and maximize your ROI. With a minimal investment of time and dollars to extend Share-Point, Colligo Engage is an ideal opportunity to drive business value by engaging employees and optimizing operations.

1.PUSH SHAREPOINT CONTENT TO USERS AND THEIR DEVICES

By extending the value of SharePoint as a content hub, Colligo enables the ability to push the right content and locations to devices for instant productivity:

- With user-specific content across all devices, workers see the same content from any device they log-in to

- Managers can configure Colligo Console to push content and/or locations to users

- Managers can also extend their existing provisioning process by using Colligo Console APIs; calls can come from other business applications, like Flow

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"We wanted to ensure that everything flight directors needed for their work was available in one place. Previously, we had to maintain paper copies of operational documents in airport crew lounges, on board aircraft and back at headquarters. If an aircraft manual was revised, updated pages or entire copies had to be physically replaced across our fleet. Today, Colligo Engage is a one-stop shop for all documents and manuals on tablets, empowering flight directors to create safe and pleasant flight experiences for the crew and passengers."
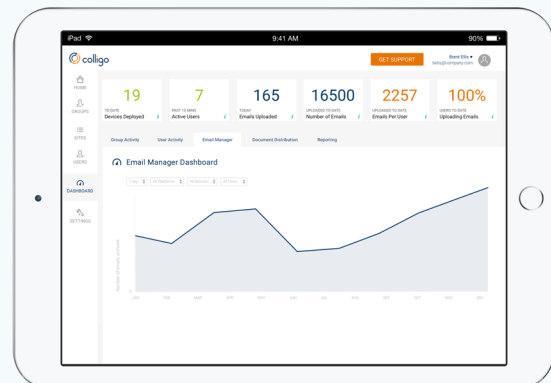
Martin Lachance,
Director, IT Solutions, Air Transat

2. TRACK CONTENT USAGE AND ADOPTION

Colligo Console delivers Departmental Managers with powerful centralized tools for administration and reporting:

- Managers can discover adoption by: Sites, users, devices, Mime-type – without any additional IT involvement

- Deep analysis and reporting on document compliance (i.e. which documents have been downloaded and read) without needing any IT involvement

- A unique ability to report on email filing (compliance) per user and location

3. CAPTURE MORE METADATA WHEN CONTENT IS SAVED TO SHAREPOINT

By making it easy to add metatags to content being uploaded to SharePoint, Colligo Engage significantly increases the volume of centrally classified information. Colligo Engage extends SharePoint's powerful ability to tag content with metadata by:

- Uploading/Adding files from devices and applying metadata, or editing metadata for existing content

- Configuring the automated capture of metadata

- Presenting metadata-based SharePoint views on mobile devices

- Capturing email metadata when filing an email to SharePoint

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National Grid Selects SharePoint with Colligo

"We looked at other document management systems specifically designed for the legal industry, but found that SharePoint could provide most of the functionality we required, and our IT department was keen on deploying SharePoint companywide. Therefore, we wanted to build a formal process around document management using SharePoint."

Adam Davidson,
Solicitor, Energy and Regulation at National Grid.

International energy company National Grid selected SharePoint to house all of their documents. But the legal team needed more. Specifically, a way to easily drag-and-drop emails into SharePoint document libraries, while automatically capturing email properties and mapping them to metadata columns in SharePoint.

"Since deploying Colligo, we've found the adoption of SharePoint for document management has improved and the amount of content stored in SharePoint has increased," said Davidson. "Case management has also improved because all legal matter, including email, is stored centrally in SharePoint. Before SharePoint and Colligo, staff had a lot of difficulty finding a document or email if the lawyer was away, and may have found it impossible if the email remained in the lawyer's personal folders in Outlook. As everything is now properly tagged with metadata, staff can find what they need much more easily."

Adam Davidson,
Solicitor, Energy and Regulation at National Grid.

Read the full case study

4. CAPTURE EMAILS AS RECORDS WITHIN SHAREPOINT

With email representing one of the broadest forms of corporate communication, there is often a need for emails to become part of a record.

Colligo apps simplify the process for users who need to capture and share emails as records within SharePoint by enabling users to easily:

- Archive emails and attachments from Outlook to SharePoint, with support of metadata

- Send files from SharePoint as links or attachments

- Search filed emails and documents using SharePoint metadata directly from the email client
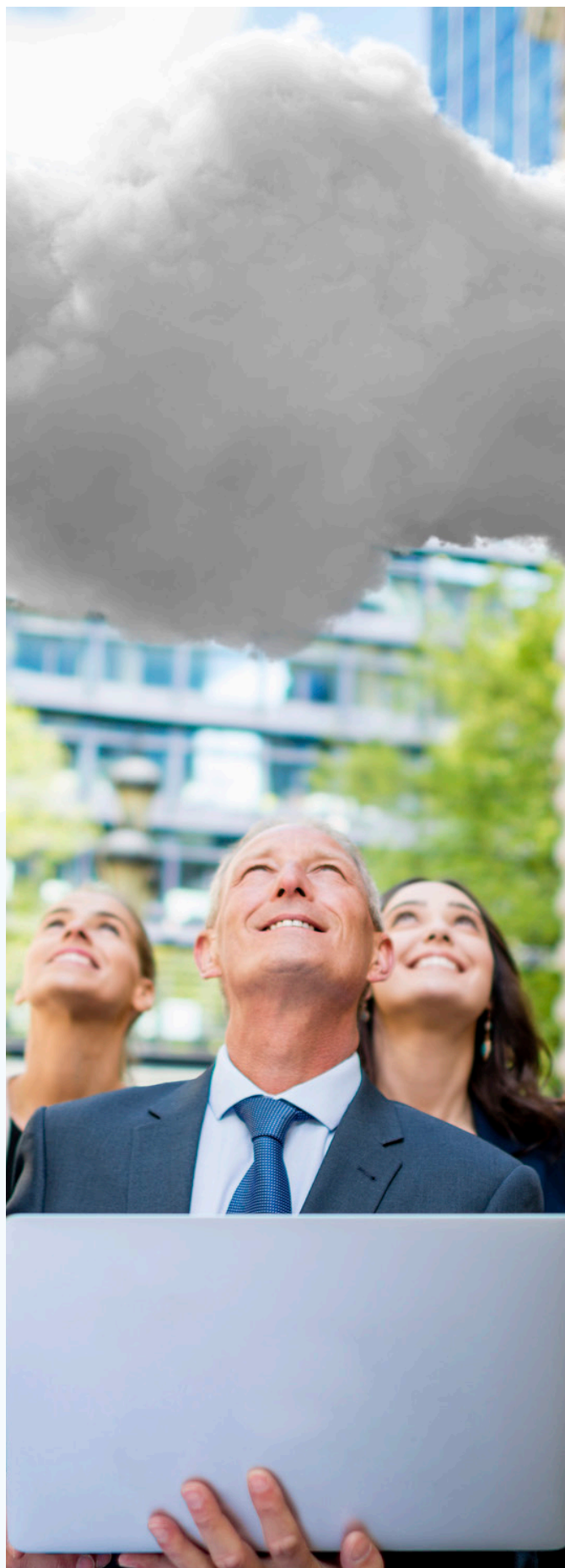
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"Colligo has enabled the National Grid legal department to leverage the power of SharePoint in a way that is familiar and seamless to our users."

Adam Davidson
Solicitor, Energy and Regulation

5. DEPLOY MOBILE CONTENT MANAGEMENT POLICIES CENTRALLY

While Microsoft enables mobile device management (MDM) using InTune to deploy governance policies, Colligo extends this to the business by enabling mobile content management (MCM) using Colligo Console. With Colligo Console, business departments can:

- Push app-specific policies from one place (Colligo Console) out to users

- Enable/disable sync on 3G, disable printing, disable open in other apps, limit size of storage on mobile devices, prompt on metadata, allow offline use

> ❝
>
> "Air Transat wanted to give flight directors the best tools possible. Six months after implementing Colligo Engage, our employee survey returned a 91% user satisfaction rate with the new app. We have received very positive feedback from users who report great efficiency gains. We are very, very impressed."
>
> **Martin Lachance,**
> Director, IT Solutions, Air Transat

Air Transat needed to ensure that their flight directors had accurate flight, safety and passenger information – especially when they were offline.

"With Colligo Engage, we invested in our flight directors. Now they have access to all the latest information," noted Martin Lachance. "With one click they quickly find the information they need to respond to a passenger question. This makes a big difference in terms of both customer service and employee satisfaction. Flight directors have the best information at their fingertips. It makes their life simple so they can spend more time where it counts: on passenger satisfaction."

Deploying the Colligo Engage platform has enabled Air Transat to:

- Eliminate paper-based processes as a green initiative

- Provide flight directors with a one-stop-shop for information

- Improve operations with easy, fast access to documents

- Deliver the best in-flight experiences with offline data access

- Optimize flight director productivity and employee satisfaction

- Improve central information governance and distribution

- Meet regulations more efficiently with electronic manuals

Read the full case study

6. ENRICH THE OFFLINE USER EXPERIENCE

Your users rely on Microsoft OneDrive to sync files for offline use. But controlling sensitive company data requires corporate governance. Colligo extends granular control over what content can be taken offline, ensuring you are mitigating risk while establishing corporate policies that protect everyone. With Colligo:

- Users can take files, folders and libraries offline

- Managers can designate specific content that will be pushed to groups of users who need it offline

- Managers can get offline usage analytics

- Workers can search on metadata while offline

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"Before we installed SharePoint with Colligo, our CEO would search and then print the most relevant information on a particular region. Piles of paperwork got packed into his briefcase and carried onboard the plane for him to review in flight. The challenge was that the local region might be looking at different reports, preparing for his arrival. It meant that time was wasted trying to get everyone on the same page,"

David Lepicier,
Business Intelligence Director,
Pernod Ricard

Read the full case study

7. ENRICH DISCOVERY AND COLLABORATION FOR USERS

- OneDrive enables users to auto-discover sites in SharePoint on-premises and Office 365, and to upload/add files from devices

- Colligo extends capabilities to on-premises, Hybrid, Office365, other cloud solutions

  - Users can add, access and share content between different SharePoint sites, regardless of platform (i.e. on-prem, O365)

  - SharePoint views support; if users have a lot of content in a library, they can filter based on metadata

  - Users can also search for content using metadata tags

  - Users can enable a push notification from documents they have identified as a favourite

Colligo Console

IS COLLIGO RIGHT FOR YOU?
TAKE THIS QUIZ AND DISCOVER
YOUR COLLIGO COMPATIBILITY

ANSWER THESE QUESTIONS	YES	NO
Does your organization use SharePoint as your main document repository?		
Do you want or are you going through changes to improve how you manage and share information?		
Do you want to transform how your employees work by pushing relevant content to mobile devices and laptops for instant productivity (one step beyond having them search for the content themselves)?		
Does your business view email as a critical document exchange and/or repository with content that needs to be shared?		
Do you have line-of-business (non IT) staff that need to administer and manage complex business processes with respect to document management, governance, process, reporting and analysis? (Note: In particular, these workers do not have administrative rights, nor want administrative rights to SharePoint)		
Would you solve a major business challenge if you could turn on a solution that incorporated business applications and a governance framework, and that could be deployed in a matter of days on top of your existing SharePoint platform with minimal IT support?		

If you answered "yes" to any of these questions, then you might be a perfect candidate for Colligo Engage. Colligo is a leading provider of mobile content management solutions for Microsoft SharePoint, Office 365, and OneDrive for Business. The company's award-winning, unified suite is used by over 5000 organizations every day for email management, document distribution, and mobile collaboration.

GET FIVE FOR FREE

For businesses that would like to try Colligo Engage, Colligo offers five free subscription licenses. Free licenses include user community support, and future software upgrades may not be included. Get your five today.

/ REFERENCES

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