

“Ease of use once again tops the list of satisfaction factors for ECM systems...”

2009 AIIM State of the ECM Industry Report



“Just because an ECM system is deployed doesn’t ensure user participation – the system must be convenient, useful, and able to integrate with daily processes and tasks.”

Microsoft White Paper: “The Business Value of Microsoft SharePoint 2010”



“Email management is still the biggest content issue within ECM, and even those with well-developed ECM systems are failing to bring it under control.”

2009 AIIM State of the ECM Industry Report



Why Client Technology is Important to Organizations that Have Deployed SharePoint

SharePoint 2010 is Ready for Enterprise Content Management

With the 2010 release, SharePoint has become a powerful platform for enterprise content management (ECM). A 2010 AIIM report indicated that over 72% of organizations have either deployed or plan to deploy SharePoint in the near future. Microsoft’s tag line for SharePoint 2010 is “ECM for the Masses” since it integrates social networking and collaboration tools with traditional content management capabilities to deliver ease of use, flexible compliance and cost effectiveness. With all this potential on tap, why is SharePoint client technology important to organizations that have deployed SharePoint?

The Importance of User Adoption to a Successful ECM Deployment

In a 2009 AIIM survey, ease of use was cited as the most important consideration when choosing an ECM solution. Making ECM easy to use increases user participation, which has been shown to increase the quality and quantity of content being managed. It also increases staff productivity and improves knowledge sharing and management.

Obtaining high user adoption requires careful planning. In a white paper entitled “The Business Value of SharePoint 2010”, Microsoft states “Just because an ECM system is deployed doesn’t ensure user participation – the system must be convenient, useful, and able to integrate with daily processes and tasks.”

While SharePoint 2010 is a step forward in ease of use, the out-of-the-box interface may not be enough to overcome some user adoption issues. For example, many users are resistant to adopting new tools into their daily routine. They may prefer to stay in Microsoft Outlook or work through Windows Explorer, rather than switching to a browser to manage their content. In other cases, users who work outside the office over slow or intermittent connections may require offline access to their ECM system.

Increasing User Adoption with Colligo Contributor

Colligo’s SharePoint client solutions drive user adoption and help organizations grow the value of their information assets while improving workforce productivity by enabling people to access, capture, and classify information from popular desktop applications, when and where they need it. These industry leading client solutions help organizations meet their ECM goals by offering alternative interfaces that encourage all users to participate in the storage, tagging, and retrieval of content. The deployment of Colligo solutions can also improve adherence to compliance requirements, and can lead to more relevant content being captured, tagged, and managed.

Colligo offers a family of products that seamlessly integrate SharePoint into common desktop interfaces, such as Microsoft Outlook, Windows Explorer, and any application that uses the Windows Open/Save dialog. In addition to making it easier to get documents, files and emails into SharePoint, Colligo’s client solutions provide advanced metadata capture and management capabilities to ensure that content moved to SharePoint is properly tagged for better classification

Benefits of Deploying Colligo's SharePoint Client Solutions:

- Increased user participation
- More relevant content captured
- Increased collaboration and content sharing
- Improved quality of classification and better searches
- Improved compliance
- Reduced training costs and duration
- More control over proliferation of SharePoint content

“Colligo Contributor has significantly increased the number of emails that our staff are managing in SharePoint... Now professionals can simply drag-and-drop emails to SharePoint document libraries and at the same time, add custom process metadata – all within Outlook.”

Susan Nordfoss, Chief Knowledge Officer



“Colligo Contributor has driven better collaboration within our legal team because it ensures that all case-related emails and documents are easily uploaded to SharePoint, tagged with accurate metadata, and available both online or offline”

Adam Davidson,
Solicitor - Energy & Regulation



and findability. Colligo products also provide offline access to SharePoint with the industry's most advanced cache and synch technology built into all products.

Colligo and Office 2010

Integration between Office applications and SharePoint has improved in Microsoft's 2010 offerings, however, some organizations are looking to extend these capabilities by providing support for emails and non-Office file types in SharePoint. For example, all Colligo's client solutions extend Office 2010 by providing advanced metadata capture and editing capabilities for all file types including pdfs, media, and graphics files in their native format, whether online or offline.

For organizations wishing to manage emails in SharePoint, Colligo offers seamless integration between Outlook and SharePoint. Colligo's integration with Windows Explorer delivers the ability to Open, Save, and Tag SharePoint files from virtually any application. The following table summarizes the ways Colligo Contributor extends Office and SharePoint 2010.

SharePoint Client	Office 2010 Alone	Colligo Contributor Add-In for Outlook
Drag and drop emails to SharePoint in Outlook		✓
Send & File to move emails to SharePoint		✓
Extract email metadata automatically		✓
Select Content Type when moving emails to SharePoint		✓
Apply custom metadata, including managed metadata to emails		✓
Manage email attachments in SharePoint		✓
Access SharePoint metadata and views offline in Outlook		✓

Colligo's SharePoint client solutions have been designed to address the following scenarios:

Email Management

Emails and attachments form a large portion of enterprise information that needs to be managed. Colligo's client solutions provide seamless integration to SharePoint from within the Outlook interface. These solutions give users the ability to easily drag-and-drop emails and attachments from Outlook directly into SharePoint document libraries while automatically capturing email properties (To, From, Sent, etc.) and saving them as metadata. The Send & File feature saves time and ensures critical emails are saved to SharePoint when sending from Outlook. Attachments can also be automatically uploaded to SharePoint and replaced with links in emails, for improved collaboration, content tagging and revision management.

Collaboration

SharePoint has proven its value as a collaboration platform in thousands of organizations worldwide. Colligo's client solutions help knowledge workers leverage the power of SharePoint with easy to use desktop tools and extensions that significantly improve the efficiency of moving email and files

“The Colligo Contributor Add-In provides an excellent solution for email management in SharePoint... It enables us to fully utilize SharePoint to centralize case data and because it’s so easy to add emails and files to SharePoint, our Practice Center is growing with well-indexed documents that are easy to find and share.”

Israel Fischer, Partner



“By making SharePoint easy to use and with its email drag-and-drop and metadata capture capabilities, Colligo Contributor helped drive adoption of SharePoint within our firm, ultimately enhancing customer service while improving regulatory compliance.”

Michael W. Morris, MS, PE, Founder



“Using Colligo Contributor Client, updated SharePoint folders are automatically synched to the sales reps laptop when they connect in the morning so they always have access to the most up-to-date files when they are at a customer site.”

Michael Marzano, Business Process Manager



“Colligo Contributor has made it easier for our project teams to work with SharePoint and it has really helped drive adoption of SharePoint for email records management at Webcor... It wouldn’t be an exaggeration to say that Colligo Contributor has been central to the success of our SharePoint project”

Richard Grove,
Senior Project Manager, Technology



into SharePoint and tagging it with relevant metadata. Whether the content originally resides on the desktop, on file shares, in the “cloud” or inside an Outlook email, Colligo’s client solutions help ensure that all the necessary content is stored in SharePoint, tagged for findability and accessible to everyone that needs it.

Document Management

A successful document management deployment depends on high user acceptance so that critical content becomes easy to find and share. SharePoint is ideal for document management and Colligo’s client solutions make it as easy for users to save files and emails to SharePoint as it is to save them to their desktop. Standard document management functions, such as document capture, metadata editing, selection of content type, offline access and check-in/check-out are available through Colligo’s rich desktop interfaces. Whether an email, Office document, or any other file type, Colligo allows users to easily save/move content to SharePoint and capture/edit metadata, increasing both the quantity and quality of the content managed.

Compliance

Regulatory/legal compliance and risk management is the driving force behind many SharePoint ECM deployments. Colligo’s client solutions empower users so that they are able to easily move required content into SharePoint, set content type, and capture accurate and relevant metadata, so that organizations can implement a full governance policy on important information. By ensuring that all documents, emails or files can be easily added to SharePoint, classified, and tagged with metadata, organizations are able to save time and cost in tracking down documents for legal or compliance requirements.

Offline Access

In many environments, network access to important SharePoint information is limited or not available at all. Colligo’s client solutions enable users to cache SharePoint content locally and allow them to instantly access, modify, and create SharePoint documents, list items, and metadata without having to worry about being connected to the network, nor the quality of the connection. Changes made while offline are automatically synched when online and are managed by a conflict resolution engine that ensures the right version is preserved. Colligo’s Outlook solutions securely cache SharePoint content and emails locally (not in a PST file), making this content accessible offline within the Outlook interface. File, email or document metadata is also available offline for viewing, sorting and editing with any changes made offline automatically synched when back online.

Exchange Public Folder Migration

Exchange Public Folders (EPFs) are being replaced by SharePoint in many organizations, because it is a better choice for document sharing and collaboration applications. To ensure high user adoption and a successful EPF migration project, replicating the EPF experience in SharePoint is essential. Colligo’s client solutions provide the same Outlook folder tree integration, drag-and-drop capabilities, and automatic email metadata capture that users expect, minimizing training and maximizing their use of SharePoint for email management.

Project / Engagement Management

As a user-centric enterprise content management platform, SharePoint has been deployed

“Colligo Contributor makes SharePoint easy to use with quick drag-and-drop capabilities, metadata capture, and email management. It has helped improve enterprise records management, while making regulatory compliance more efficient.”

Nishan DeSilva, Global Director, Records & Content Management



“The development of our offline viewer went very well and we attribute this to two key areas: the first and most important is that the SDK actually works. The second key to our smooth development effort was the excellent support that we received for Colligo’s technical staff.”

IT Director, Global Professional Services Firm

extensively for project / engagement management. Colligo’s client solutions facilitate project management in SharePoint by ensuring that all documents, files, and emails related to a project are easily stored in one location, tagged with metadata and made accessible to anyone that needs them. With its offline capabilities, Colligo’s client solutions are often utilized by organizations with mobile or off-site workers, such as construction companies or consulting firms, whose staff need to access, modify, and tag SharePoint content while away from the office.

Records Management

SharePoint provides an ideal platform for records management and even more so with the new functionality available in SharePoint 2010. To meet regulatory compliance, many organizations are required to store both emails and documents as records in SharePoint and apply a consistent content type and metadata taxonomy. Colligo’s client solutions give users a way to easily move files and emails into SharePoint, classify with a content type and tag with accurate metadata. Colligo also enables users to interact with SharePoint beyond the browser, using the interface that makes most sense for the task at hand, whether it’s via Microsoft Outlook, Windows Explorer, an application’s Open/Save As dialog, or the standalone client interface. Colligo Contributor supports several of the advanced records management features in SharePoint 2010, such as in-place records management.

Custom Application Development

Customers and partners recognize the power of SharePoint and Colligo’s client solutions, however some need to go beyond the standard capabilities. For example, organizations may need deeper integration with their desktop software environment or extensions to meet specific business needs. To meet these requirements, the Colligo Contributor software development kit (SDK) is available and enables organizations to quickly and easily build connectors to SharePoint from any custom or standard application.

For more information on how Colligo’s award-winning SharePoint client solutions can help your organization, please email us at sales@colligo.com or call us at +1 (866) 685-7962.



The Ultimate Desktop Integration to SharePoint Colligo Contributor Pro combines three interfaces:

- Add-In for Outlook
- File Manager
- Standalone Client for SharePoint



Integrate SharePoint with Outlook

- Drag-and-drop & “Send & File” emails & attachments to SharePoint
- Automatically capture email & file metadata
- Manage attachments in SharePoint
- Online-only version available (Uploader)



Integrate SharePoint with Windows Explorer

- Open/Save to SharePoint from desktop applications
- Manage metadata via Windows Explorer
- Drag-and-drop files & folders to SharePoint



Take SharePoint Offline

- Automatically cache & synch SharePoint content to laptop
- View & edit metadata while offline
- Check in/check out & conflict resolution support