Connecting the Mobile Workforce

Building Business Critical Systems with Colligo and Microsoft SharePoint

Colligo
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One of the many demands placed upon a company's Chief Information Officer (CIO), or equivalent, is to ensure they are addressing the four main requirements stipulated by the modern workplace, with its many IT systems and often disparate workforce. These requirements include:

Knowledge management - *harness conversations within an organization*
An organization needs to do much more than simply serve up content and documents to its users. It needs to support individuals, their conversations, and the interactions with each other.

Collaborative working - *Including document collaboration*
In this context collaboration means the ability for multiple users to work together on documents, and to manage them securely using features like check in/out and version control.

The Consumerization of IT - *Mobile working with tablets and smartphones*
Users no longer rely on their IT departments to provide, often outdated, mobile phones or laptop devices. Instead they expect their own phones, tablets, and computers to work seamlessly with their organization's IT systems, no matter their location.

Security - *Offering data security and integrity 100% of the time*
An organization needs to know its data is secure, no matter how and where it is being used. It also need's to know how to remove its data should it need to.

Business critical systems offer a solution

A recent white paper, The ROI Benefits of Business Critical SharePoint authored by Microsoft and Pique Solutions, an independent research and analysis firm, defined a business critical system as one that:

"Extends and automates important business processes across, and even beyond, organizational boundaries by exposing line of business (LOB) data, and allowing it to be used across the organization."

The paper found that by providing wider, and more efficient, access to LOB data these systems become hugely important to the organizations that use them:

"Customers found that these solutions, rather than delivering savings in the marginal range (e.g., 10 to 20 percent), actually drove "transformational" savings as high as 80 to 90 percent. By employing BCSP as the path to these solutions rather than other IT approaches, companies also realized faster deployment, far less custom coding, and simplified ongoing administration and governance."

SharePoint has always been much more than a product to simply build websites or Intranets, it is a platform for building business solutions. But increasingly it is being used in conjunction with third party products, like the Colligo range of enterprise applications, to build *business critical solutions.*

Let us look at three specific examples where SharePoint and Colligo combine to offer a business critical system solving a specific problem:

Building a system of engagement
Projects often start out promising high levels of user adoption and interaction. Yet in reality both of these things can be extremely hard to achieve, especially in the long term. Building a system that moves on from being a 'system of record' (such as a typical Intranet with basic documents and static content) to a 'system of engagement' (where users are regularly collaborating on content and sharing insights with each other) needs careful consideration and planning in order to be successful.

One route to achieving a system of engagement is to bake email directly into the process. While it is easy to forget the humble messaging protocol in these days of social tools and apps, email is by far still one of the most popular ways users interact with each other.

Colligo Email Manager provides seamless integration between Outlook and SharePoint. Users can drag and drop files and messages directly into SharePoint from within the familiar Outlook interface. They can define rules to automate filing, declare SharePoint records, and take advantage of smart file naming.

Building a SharePoint system that takes advantage of a well-used and embedded technology like email gives a head start on user engagement, and could help support adoption across the rest of the system.

Connecting people
The modern workforce is no longer tied to the traditional office environment, or the standard desktop PC. Remote working grows in popularity every year, and with it people's expectations of being able to use any laptop, tablet, or even smartphone to access the tools and content they need for their day to day work.

As a result of these trends a successful business critical system needs to be mobile from the outset. SharePoint 2013 offers fantastic support for mobile devices and access. General markup and mobile page layouts have been improved, and are much more standards compliant than they were in the past. In addition SharePoint systems are built to target specific mobile devices with specific content.

Colligo Briefcase Enterprise (for iOS) takes this a step further, giving iOS users productive offline access to their SharePoint content. Users of the app can securely sync content, access it offline, and edit content and metadata on the move. InfoPath forms are also supported, helping to improve business efficiency by eliminating the need for paper out in the field.

Colligo Briefcase helps to take a business critical system outside of the traditional boundaries and puts it in the hands of users when they need it most - on mobile devices away from the office.

Connecting line of business systems

As we have seen a key feature of a business critical system is connecting to line of business systems, and providing a central view of disparate data. SharePoint has historically been very strong in this area, and the latest release offers a number of significant improvements.

'Business Connectivity Services' (BCS) is a specific SharePoint feature that allows it to connect to a wide number of external systems, and provide read/write access to their datasets. This could be as simple as pulling in SQL database information, or it could be as complex as full interaction with an externally hosted website. BCS can create 'external lists' which have all the power of standard SharePoint lists, put whose data is populated from an outside source. Once in a list this data can be manipulated in standard ways, including the use of SharePoint Views.

Colligo provides a different, but no less effective, means to help connect disparate systems. Email can be considered as just another LOB system, and Colligo Email Manager provides an easy way to integrate it with SharePoint. Colligo Briefcase provides a comprehensive solution to making SharePoint data mobile. Once data is in a SharePoint list, Briefcase allows users to interact with it on the move, or even offline.

Colligo in action

The Colligo website offers a number of case studies, demonstrating just how the products described in this piece have be used in conjunction with SharePoint to build business critical systems. These include:

- ITI Scotland Ltd - Using Contributor Pro for Outlook to give consultants offline access to vital company data. With the help of Colligo the company has been able to:

  - Drive 100% adoption of SharePoint among project teams and consultants
  - Increase the productivity of mobile workers with offline access to SharePoint content
  - Reduce the risk of loss, theft, and data corruption of intellectual property

- Benco Dental - Briefcase pro has empowered the Benco sales workforce, with the following results:

  - Improved sales productivity by 15%, by enabling them to respond on-site, cutting the need for follow-up time back at their desks.
  - Broadened SharePoint adoption by 20%, by enabling sales to access their sales collateral on the road and offline.
  - Increased customer satisfaction by responding more rapidly to dentists' questions.