

Whitepaper

Confused About SharePoint?

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Confused About SharePoint?

It's a pity isn't it? A great technology like SharePoint comes along and the biggest effect it has is one of utter confusion. We all know that many businesses "use" SharePoint even now, but so few of them can actually say *how* or, worse, *why* they use it.

It doesn't help that there are two very different versions of SharePoint – WSS (a free component of Windows Server) and MOSS (a much more expensive box of tricks with more capabilities). In this paper we'll concentrate on WSS since this is what most SMEs, departments and mid market organizations will be implementing.

The reasons for the confusion are two-fold. Firstly, Microsoft has not been very precise with how SharePoint is positioned. In one paper it is a platform that enables enterprise content management (ECM) solutions to be built, and the next week at a conference somewhere, it is an office application you can install and use to solve all your content problems overnight. No wonder we're all lost.

Secondly, the technology has most often been rolled out by IS departments as a panacea for business information needs. As is often the case, the "needs" were not always well described and real solutions were not necessarily delivered. I doubt anyone reading this can say they do not have a solution from the IS team that just sits there and doesn't get used. You can hear the grumbles now – "*They didn't ask me if I wanted it*"...."*It doesn't actually do anything for my team*" and so on. Most businesses end up with one big messy and expensive file share. This is a case where the technology has simply not been rolled out to real users and applied to real business solutions.

Let's see if we can make the picture clearer.

SharePoint is a Collaboration Platform

SharePoint today is a platform for collaboration. Its focus is on sharing and dialogue with the wider set of people and teams beyond users of discrete systems such as accounting or CRM; in short intranets, extranets and more.

To this end, SharePoint provides some basic content sharing features like Workspaces, Wikis and blogs. It also provides for shared diaries and document libraries to enable shared views of important projects or events. This much you get for relatively little effort. The result: people can interact by sharing content in a free and easy manner.

With a little more effort, SharePoint can be used as a window on internal data and processes. It can host "dashboards" on systems that are otherwise black boxes to the rest of the business – opening up key data and management information to the wider business. Enterprise Search is a special case of this, and SharePoint can be the host to a federated search into those systems able to cooperate. For systems that do not cooperate, special connectors can often be developed by software integrators.

SharePoint has some rudimentary document management and workflow features: folders, simple meta-data and versioning. It does not, however, deal with any of the key aspects of document and records

management that we discuss below. In addition there are many smaller omissions in the out-of-the-box SharePoint system that becomes important very quickly. For example

- No system or world unique document numbering
- No versioning and audit history with a document as it is moved around libraries
- Poor meta-data searching

The user interface is not ideal for large numbers of documents and secured folders and soon requires augmentation. This list is not exhaustive, but does show the lack of focus that SharePoint has on real world document management.

In short, SharePoint is a great portal into your business systems and extending their reach beyond the existing users.

Let's talk about aspects of ECM that SharePoint simply doesn't do.

Document and Records Management

Whilst SharePoint does offer a basic document library function its primary focus is on collaboration. It therefore lacks many of the features of those specialist document management solutions designed to really support your business. For example, SharePoint does not provide features for specific file formats, TIFF, PDF, DWG and so on such as image processing (redaction, de-speckle, de-skew...) or format conversions (such as PDF/A for long term archiving).

Document viewing in SharePoint is often slow since files are pulled over the network in one go – take the case of a 1000 page TIFF; the user must wait for page 1000 to arrive before they can see page one. For an efficient office the barriers to finding and accessing these documents must be very low. In short, performance must be “snappy”.

Routing and workflow: document and information management involves capturing key information and passing it onto people or processes that can action that information. Slick and traceable routing of documents is key to an effective team. SharePoint is much more static – sure, you can cut and paste a link into an email, but there are much more efficient ways of handling this.

Good information governance goes hand in hand with a business manager's peace of mind: knowing what type of information is kept where and for how long; knowing that the information can be discovered and recovered quickly; knowing that sensitive data is being properly handled. This is “records management” for mainstream businesses and is an essential practice for any business administration that wants to, or needs to demonstrate quality assurance.

Email Capture

SharePoint would seem the obvious central store for email messages. However, there is a slew of frustrations with handling emails via SharePoint (storing emails in non-native format, splitting off attachments separately and therefore out of context, lack of prompts for metadata on saving).

Consider the volume of traffic which your organization faces - in today's world, the majority of business documents and information arrives via email. As a primary source of data, email requires serious management and needs to be discoverable. In the email environment the information is both hidden and vulnerable. Hidden, because only the recipients can see the information and vulnerable because it is probably stored in a personal folder on a PC and not backed up. Here SharePoint offers no real solution.

“Sheer overload” is reported as the biggest problem with email as a business tool, followed closely by “finding and recovering past emails” and “keeping track of actions.” (AIIM 2009)

Following this through, an effective email capture strategy becomes essential. One element to consider is managing content in emails by pulling key emails and their attachments out of the email system and making them business records to be properly stored and lifecycle managed. Given the volumes involved this needs to be slick and automated.

From a competitive standpoint, it's amazing how few businesses have policies and systems in place. *“Only 19% of those surveyed capture important emails to a dedicated email management system or to a general purpose ECM system. 18% print emails and file as paper, and a worrying 45% file in non-shared personal Outlook folders.” (AIIM 2009)*

For systematic capture, policy-driven solutions can select emails to store automatically based on simple rules.

For more selective control the sender or receiver of the emails needs to play a role. The challenge here is to make the user experience as intuitive and efficient as possible to move data from emails into a document store – a power assisted filing system.

When considering an email management policy, is it the email itself that is important? Or is it the attachment? Should I file this with other content from the same sender or from this email thread? These are the important minute by minute capabilities a business of today needs to cope with incoming and outgoing information. Here, you'll find that SharePoint is not at its strongest.

Paper Capture

Technologists will have us believe that physical documents are anachronisms that have no place in the digital age. Real life doesn't yet marry up with this vision for the majority of organisations. It is an important fact that paper documents make up a significant portion of business information today and it's a genuine nuisance for those of us yearning for the brave new world. It's this world into which SharePoint fits – something to be celebrated. However, paper handling is an Achilles heel for SharePoint and requires dedicated add-on specialist tools.

The shame of it is that dealing with paper documents is inefficient and costly – a key win to be tackled early on for many businesses; extracting information for analysis and processing is a chore often left unstarted and it's here where many document management systems have successfully focused. Very, very few organizations can consider themselves immune from the problem. Even for those businesses that do not rely on paper internally, it still turns up on the doorstep from outside. From an ROI perspective, establishing a mechanism for dealing with paper is often an obvious choice.

The technology available for automating data extraction from paper is finally reaching maturity. At the same time, most paper documents are actually printed ones, which are much more reliably read than hand written ones. The result of these factors is that paper data capture is not only viable but cost effective.

What is important is that a business makes sure it takes paper data *to its systems* and does not build its solutions *around paper*. Systems that make this transition easy will bring significant benefit.

Content Automation

For good reasons, most businesses buy systems by focusing on the key task in hand and choosing the best (best of breed). What is frequently ignored at purchase time but soon becomes apparent is the challenge of moving, changing and merging content between these systems. Perhaps the output from one application needs enriching with legal content, or perhaps print output is now needed to be posted to a SharePoint portal. Maybe a new initiative to advertise on outbound invoice emails has been asked for but the “legacy” system cannot be touched.

The reality for many businesses today is that this is being done manually at great expense and occasionally with embarrassing errors. Worse still these are normally hidden costs which are simply absorbed by the business – the costs are both financial and opportunity.

Importantly, Content Automation is not deep integration. Integration using vendors proprietary APIs is expensive to create and can be fragile to maintain. Considerable development skills and investment are required and all too often the result does not bring true business benefit – but it always comes with ongoing ties that bind.

Content Automation takes the existing inputs and outputs from systems. Using powerful authoring tools the designer defines a “pipeline” of actions to change and deliver the content in different ways. Instead of working with an applications API’s, Content Automation works with the out data (e.g. XML) or documents (e.g. PDFs or print output).

This business need first approach to creating solutions is lighter, easier and more cost effective than API based integration, which means it can be used to automate more business activities and further improves ROI.

Business Process Automation (Workflow)

Business process automation or Workflow enables businesses to systemize the key processes that drive their business. The benefits of this are transparency, efficiency and ability to audit (governance and compliance). It is difficult to imagine the typical business of tomorrow not operating this way.

All workflow products provide some capabilities in common that address workflow process design, operation and reporting. Many ERP and CRM products also offer a Workflow Module that provide the same basic features, but focus on their own data. Some workflow products have been developed on top of SharePoint (including MOSS) since they recognize the business need for more than SharePoint provides.

The key question to ask when purchasing a workflow solution is to understand who creates and manages the process templates. If you as a business cannot control this in a cost effective manner then implementing change, small or large can be prohibitively expensive, and will create a barrier to business improvements.

Desktop Application Integration

A key approach taken by businesses is to associate documents with transactions in their line of business systems – this is called “transactional document management”. It could be about scanning paper copies of purchase orders or about the capture and processing of email delivered invoices.

It is vital that users of these systems can now save and search for information associated with a given purchase order or opportunity or other entity. To make this effective, users need access to these features *directly from their application*, so that document information and collaboration becomes a natural extension to their current working style and applications.

There are literally thousands of desktop applications that help run businesses today and linking with their information is a key part any information strategy.

SharePoint is a browser based application and not best suited to integration with “rich client” ERP applications such as Sage 200 or SAP Business One. Desktop Application Integration is a small but important addition to the ECM requirements of nearly all business projects.

Summary

Enterprise Content Management for your business is not simply about collaboration, dashboards and portals but also good governance and super efficiency.

Not all businesses will require every aspect of office automation described in this paper, but by focusing on the true business needs, the right components can be identified and deployed with a healthy ROI.

If you have already deployed SharePoint you can use these tools to leverage the investment and drive activity through it, as it is the daily business activities that will make the SharePoint system an invaluable business tool and not just a sleeping burden.

If you are considering deploying SharePoint look harder at the real content problems you need to solve and make sure that you have those solved and in a manner which SharePoint can easily leverage.

About the Author

Stuart Evans is the Chief Technical Officer at Invu and has held the role for two years. Stuart has overseen the development of Series 6, taking the Invu product portfolio from a simple document management solution to a suite of products that can automate processes, provide real-time information and offer security and compliance of critical data.

Prior to Invu, Stuart was a lead Architect for Sage where he oversaw products for the accountants' marketplace and also established the Sage SAAS provisioning team. He co-founded U.S. Start-ups in both the business and mobile software sectors. The first was Diffusion Inc. which went on to be acquired by Vignette, where Stuart worked on their wireless and digital TV opportunities in EMEA, including Egg TV banking. He then went on to co-found Solomio Inc. which created an innovative solution for mobile operators before being acquired by Openwave. Stuart has 20 years of experience in the software industry, largely in development but also in Sales and Professional Services.

About Invu

Invu develops software that incorporates document management, content management, workflow, automation and collaboration. Also known as the paperless office, Invu typically gives a Return on Investment in under six months, allowing companies to see efficiency savings in terms of both money and time. Invu specialises in solutions for the mid market and smaller businesses.

Invu's Open Search integration allows SharePoint users to fully utilise the benefits of WSS or MOSS whilst retaining the functions of specialist document and content management.

Invu's solutions enable automated scan, capture and management, processing and output transformation. Invu also integrates with all major accounting systems including Sage and IRIS, as well as ERP and CRM systems.

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