



2018

SharePoint Surgery

Case Management



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What is “Case Management”?

Here are a few examples:-

- Legal Matters
- Insurance (risk assessment, policies, claims, etc)
- Financial services
- Tax advice





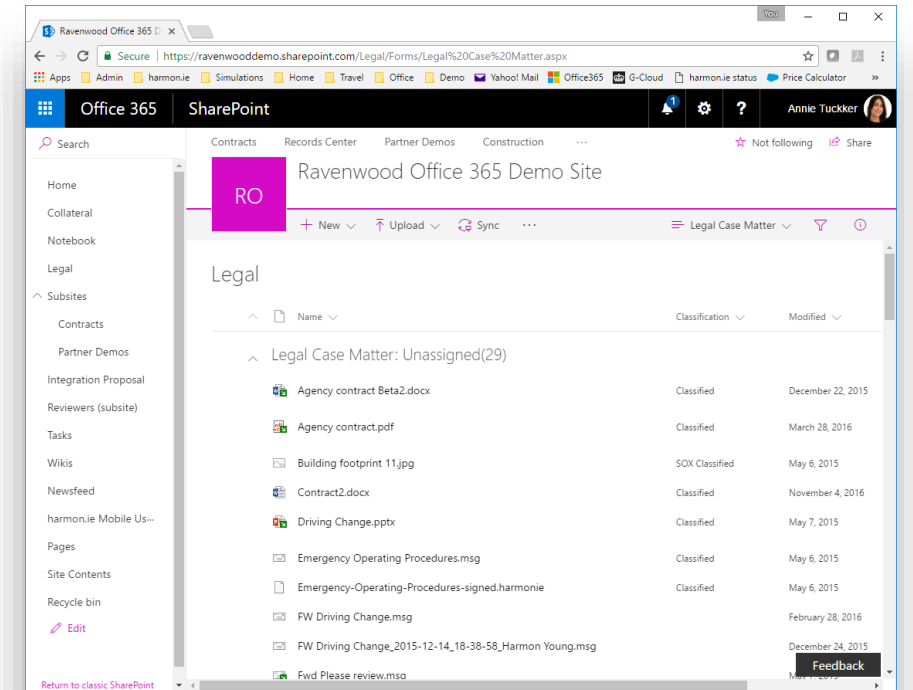
What are the challenges?

- Lots of communication – mostly by e-mail
- Traceability of who said what/when etc
- Maintaining many iterations of documentation
- Need to have a single system that users “live and breathe” in
- Each user could be working on a handful of cases at any time

Is SharePoint the best solution?

Yes, but.....

- Users may have come from a bespoke system, that meets specific needs
- Those systems typically have a tight e-mail integration
- On it's own SharePoint isn't the single interface that business users need / like / want to use



Is SharePoint the best solution?

Yes – it's the ideal **single platform**

- Manage e-mail communication and documentation together – in context
- Metadata can be utilized to organize and categorize
- Search all data together



Is SharePoint the best solution?

Yes – with Outlook and harmon.ie

Provides a complete, end to end solution



How can SharePoint be used?

There are many different approaches to structuring cases in SP

- Folders
- Libraries
- Sites
- Site Collections
- Document Sets

NEWS FLASH!

Harmon.ie supports
all of these
approaches



How should you categorise data?

- Capture metadata
- Use Views to represent data in different ways
- Bulk update multiple items at once

How do you collaborate?

With clients

- Capturing documents and e-mails
- Sending and receiving documentation
- Maintaining document versions



How do you collaborate?

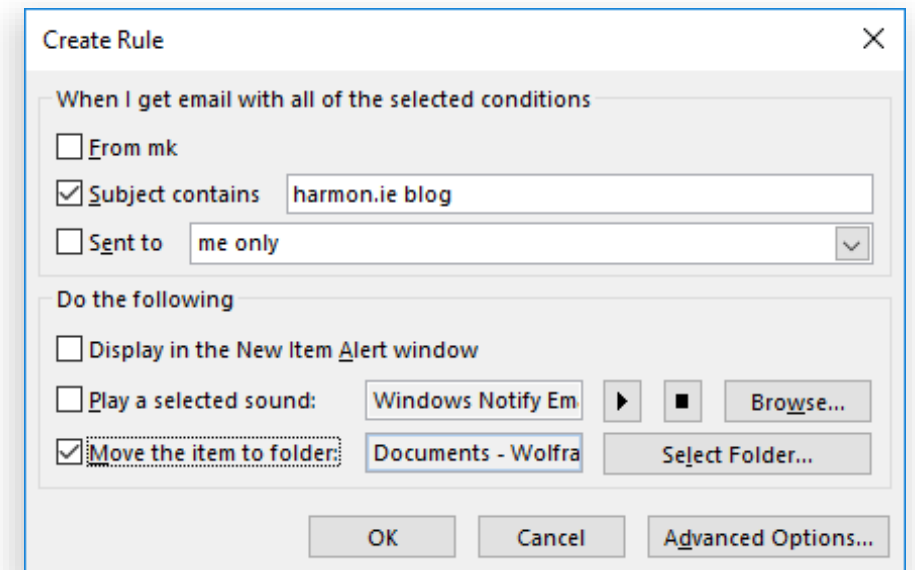
With colleagues

- Sending and receiving links
- Identifying duplicates
- Updates
- How do I know if someone else has already filed this e-mail?



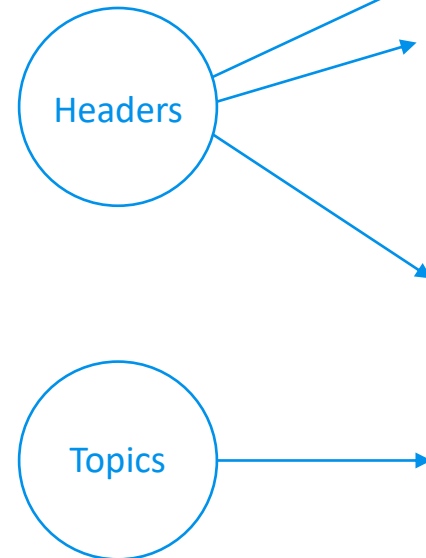
Can you automate capturing data?

- Business users have the knowledge to build logic
- They need to save time
- Outlook rules are often used to file e-mails in folders



What about automating metadata?

- Automatically map e-mail headers
- Identify relevant Topics from e-mails you receive
- Map those Topics to metadata in SharePoint



The screenshot shows a 'DOCUMENT PROPERTIES' window for a document named 'Harmon ie Demo_2016-09-22_22-01-10_Reshma Bhatt.msg'. The document is 131 KB and version 0.1. The properties are as follows:

Property	Value
Content Type	E-mail
Name	Harmon ie Demo_2016-09-22_22-01-10_Reshma Bhatt.msg
Title	Harmon ie Demo_2016-09-22_22-01-10_Reshma Bhatt
Subject	Harmon.ie Demo
To	Richard Poole <richardp@harmon.ie>
Document ID	JV7ZZVKXNDS2-307505988-899
Cc	
From	Reshma Bhatt <Reshma.Bhatt@ey.com>
HasAttachments	No
Topics	Ernst & Young; EYOS
Created	26/06/2017 16:39 Annie Tuckker
Modified	26/06/2017 16:39 Annie Tuckker

Buttons: Close, Edit

Thank You