



June 2017 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



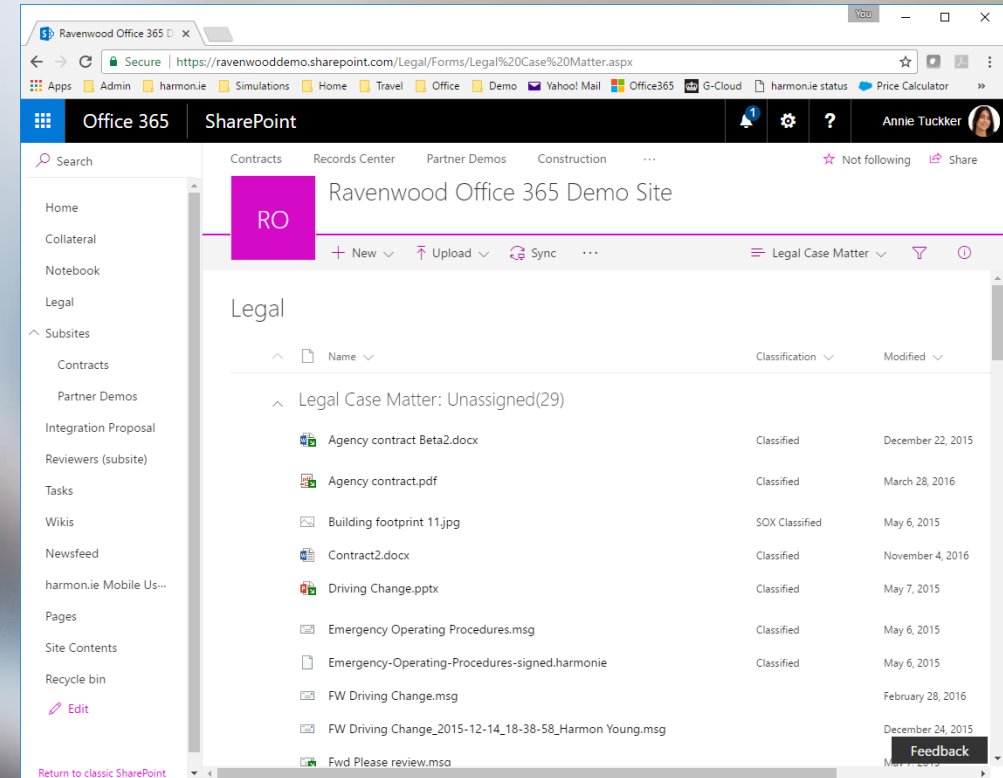
What are the challenges?

- 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

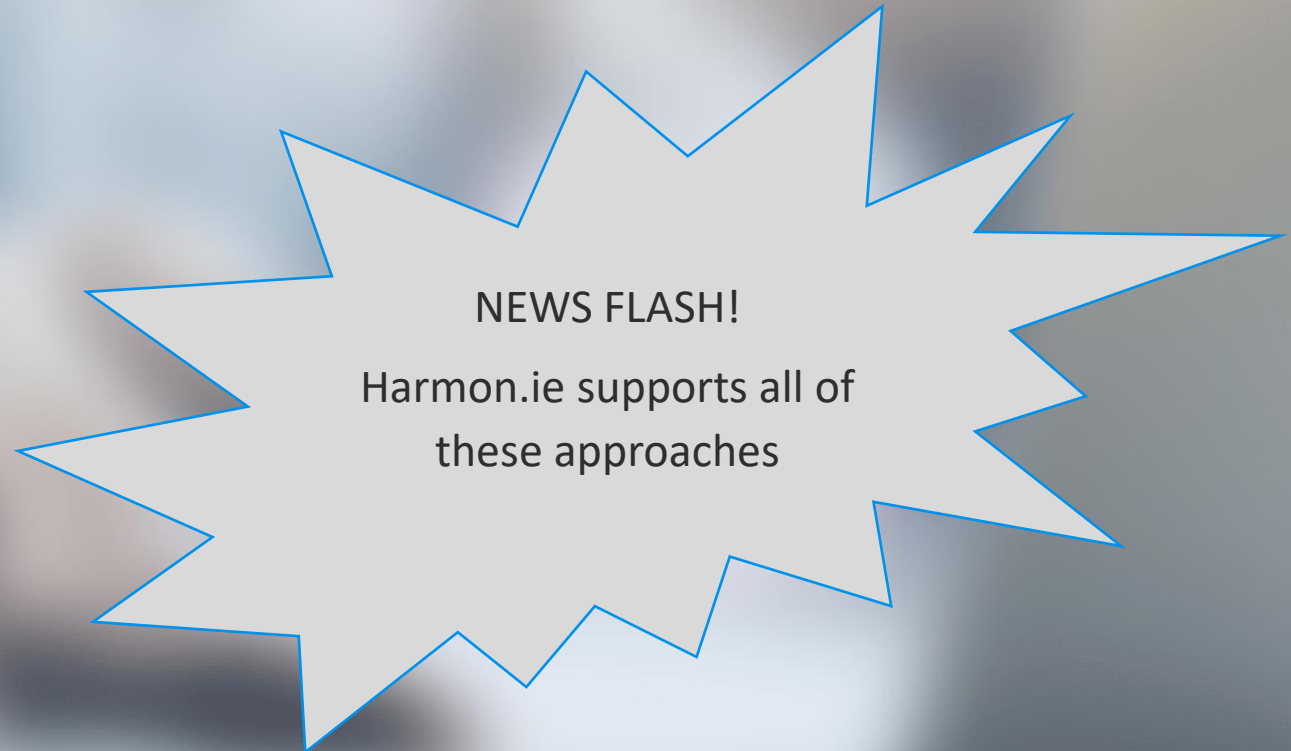
- Provides a complete, end to end solution



How can SharePoint be used?

There are many different approaches to structuring cases in SP

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



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

Create Rule

When I get email with all of the selected conditions

From mk

Subject contains harmon.ie blog

Sent to me only

Do the following

Display in the New Item Alert window

Play a selected sound: Windows Notify Em

Move the item to folder: Documents - Wolfra

OK Cancel Advanced Options...

What about automating metadata?

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

Headers

Topics

The screenshot shows a window titled "harmon.ie" with a subtitle "DOCUMENT PROPERTIES". The main content area displays the following fields:

- 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:** (empty)
- From:** Reshma Bhatt <Reshma.Bhatt@ey.com>
- HasAttachments:** No
- Topics:** Ernst & Young; EYOS

At the bottom, it shows "Created: 26/06/2017 16:39" and "Modified: 26/06/2017 16:39", both attributed to "Annie Tuckker". There are "Close" and "Edit" buttons at the bottom right.

Thank You