

June 2017 SharePoint Surgery Case Management

INDIALA



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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

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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

+ SharePoint



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

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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 emails in folders

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Subject contains harmon.ie blog						
Sent to me only		~				
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What about automating metadata?

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

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Thank You

