ECM Connection executive opinion:

Maximizing Meaningful Use of Information with SharePoint and ECM

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Linking workers with information they need so they can access it quickly and easily – in an interface they understand – is vital to cost-efficient work. ECM is typically deployed to address this challenge, enabling access to diverse information from within existing applications and interfaces, including line-of-business applications, ERP systems, and portals end users know and understand. Adding buttons, menus, tabs, and interactive icons to screens within familiar underwriting applications, fundraising software, or other systems shortens the learning curve, giving employees information they need and making them productive quickly.

But what happens when workers use multiple applications and have no primary application they use for their daily tasks? Where is their central platform for collaboration? How can teams manage tasks effectively when members have no common interface for evaluating, reviewing, updating, and processing work?

By adding the robust workflow functionality of an ECM system to your SharePoint interface, you gain access to a sequential influx of work that requires your attention.

This is where SharePoint and ECM, working together, offer significant value. SharePoint offers these workers a common and familiar-looking (Microsoft) interface for accessing information, processing work, and collaborating. ECM adds time-saving tools and provides efficient access to work, external information, and archived files.

Let's examine a real-life application.

Scenario
Let's assume you're one of several employees on a team. You create and edit documentation, track financial figures, and handle periodic customer requests. Your work requires multiple software applications, and you typically find yourself manually pulling information from one application to the next, using your notes to ensure nothing is overlooked.

By creating an ECM-driven solution within SharePoint, your documents are visible on a team-shared desktop. Word processing, spreadsheets, documents stored within ECM, events, and lists are displayed in one place for convenient viewing and processing. Appropriate project transparency and automated task distribution eliminate work duplication among team members, making you and the team more efficient and productive.

By adding the robust workflow functionality of an ECM system to your SharePoint interface, you gain access to a sequential influx of work that requires your attention. Jobs arrive in your queue along with related documents, images, emails, attachments, and other information from the ECM repository that is needed for task completion. Without leaving SharePoint, you are able to access e-forms and other tools that

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are needed to complete tasks sequentially and efficiently. ECM's rules-based processing and thorough systems integration enables you to extract and re-use stored information in multiple places where it has value, eliminating data entry errors and saving considerable time. Everything you need is just a click away, making work quick – as well as convenient – and allowing you to accomplish more.

Transparency eradicates the need for team members to provide their supervisor and each other with constant project updates. Whenever documentation is ready for review, one click adds it to the appropriate queue, packaging and routing the files appropriately for action or archival. As customer requests surface, you click on the appropriate ECM online forms, complete them, and they are automatically and appropriately forwarded. No time is wasted evaluating what's next or where to find it; ECM ensures it's available within the SharePoint interface. Tasks are handled swiftly and accurately. More work is completed, more quickly and easily.

Designing efficiency
Are you ready to make efficiency real? Well-planned integration is vital for success. Help your employees collaborate efficiently and effectively and be more productive. Provide access to everything they need. ECM, SharePoint, and smart integration make it possible.

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