

# Advanced Content Services for 0365



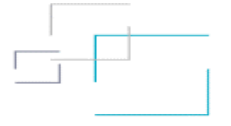
*Transform the way you store, find, govern, and use enterprise content*



October 2020

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# Presenters: Advanced Content Services for O365



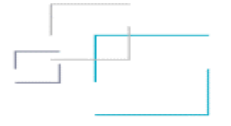
- **Konstantin Ekht**  
Solution Architect



- **David Kruglov**  
Managing Director

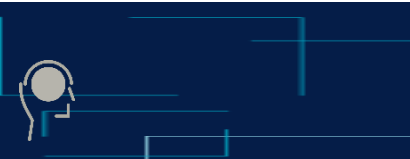


# Intention: Intention for the Webinar



- Teach and Share vs. Sell or Present “the answer”
- Complete our 2020 Webinar Series
- Foster a community of people who endeavor to improve technology systems and their efficacy
- Answer any questions you may have
- **Enroll you into being in action!**

***Be of Service to You***



# Agenda: Advanced Content Services for O365



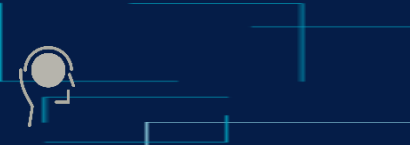
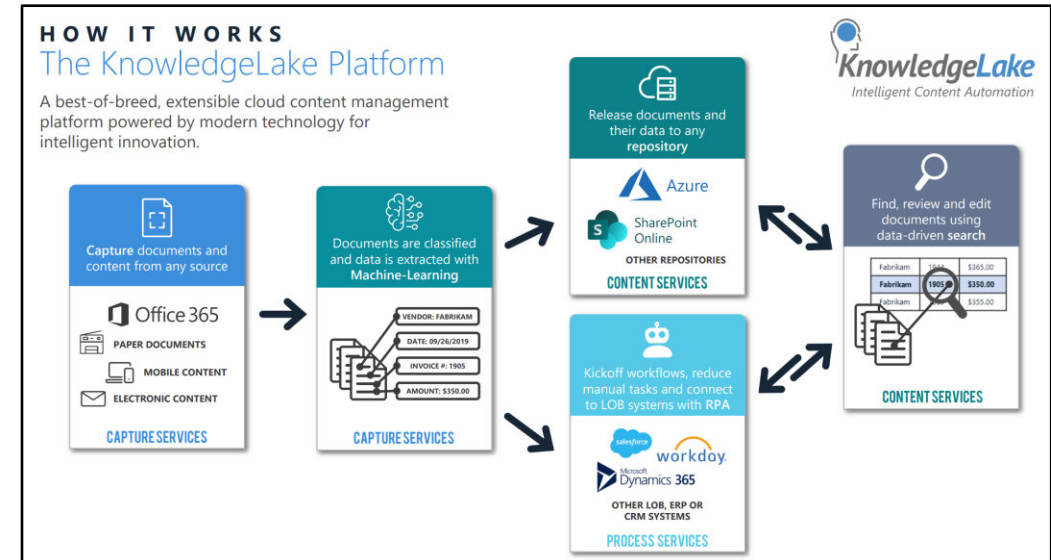
## Overview

- ECM/Records Management System Components

## Demos of the following:

- Machine learning document capture
- Intelligent routing
- Document storage and retrieval

## Closing and *Extended QA*



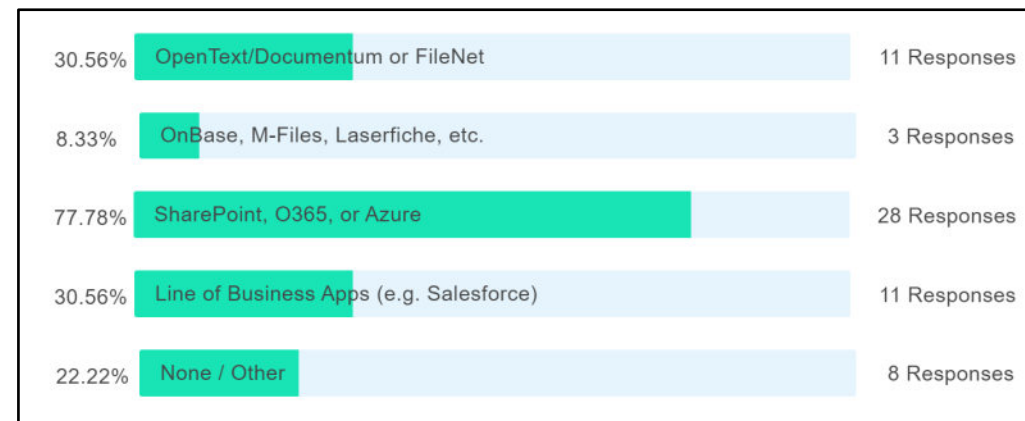
# Poll: What ECM/EDRMS system do you use?



## Select all that Apply:

- OpenText/Documentum or FileNet
- OnBase, M-Files, Laserfiche, etc.
- SharePoint, O365, or Azure
- Line of Business Apps (e.g. Salesforce)
- None / Other

## Survey Results

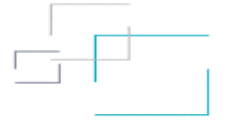


### Next Up:

➤ *ECM/EDRMS Overview*



# Overview: ECM/EDRMS System Components



## AIMM Definition

“The strategies, methods and tools used to capture, manage, store, preserve, and deliver content and documents related to organizational processes”

## Components

- Centralized Repository
- Taxonomy (Minimum Effective Dose)
- Document Capture and Indexing
- Workflow (e.g. Document Approval)
- Retention and Disposition
- Optionally:
  - Integration
  - Email Management
  - Digital Signatures
  - Auto-Classification
  - Annotation and Redaction
  - Analytics



# ECM/EDRMS: Trajectory



## Centralization

## Governance/Compliance

## Automation/Analytics

### Portals and Collaboration

- Departmental Portals
- Collaboration
- Content Publishing and Management

### Document Management

- Taxonomy
- Access from any location on any device
- Managed document processes
- File Share Migration

### ECM and Records Management

- Support legal or regulatory requirements
- Mature Taxonomy
- Declare and manage records
- Automate retention and disposition
- Document Capture

### System Integration

- Connect to back-office systems such as ERP and CRM
- Expose LOB data (e.g. in picklists)
- Document Archiving
- Bidirectional Integration

### Process Automation

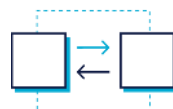
- Electronic forms and workflow to automate business processes
- Replace manual processes and one-off productivity applications
- Process / Task Orchestration

### RPA, BI, and BPM

- Task Automation
- Dashboards and Scorecards
- Automated Business Reporting
- Process Analysis and Improvement



**Unify**  
Your Infrastructure



**Manage**  
People and Teams



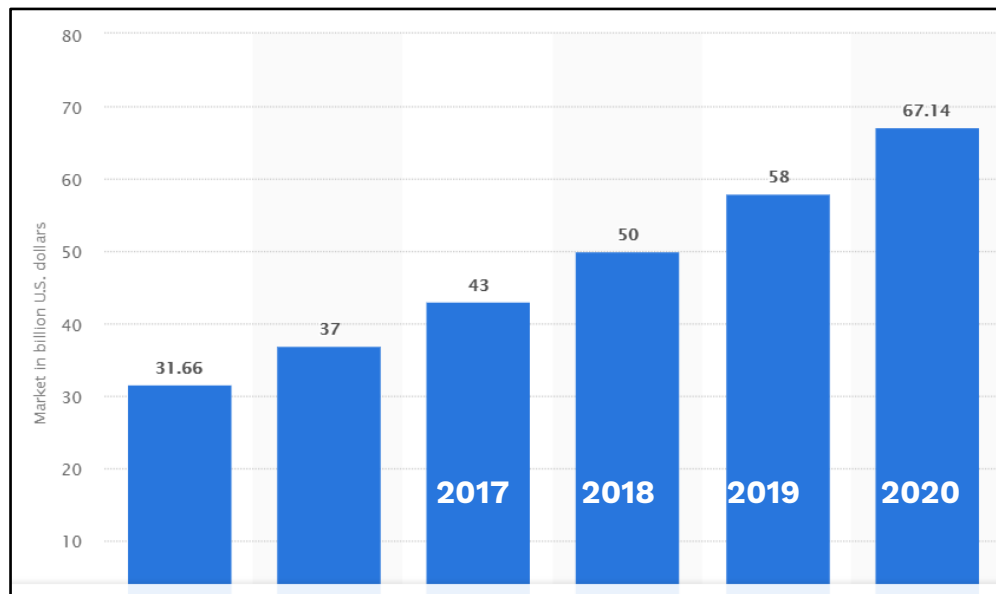
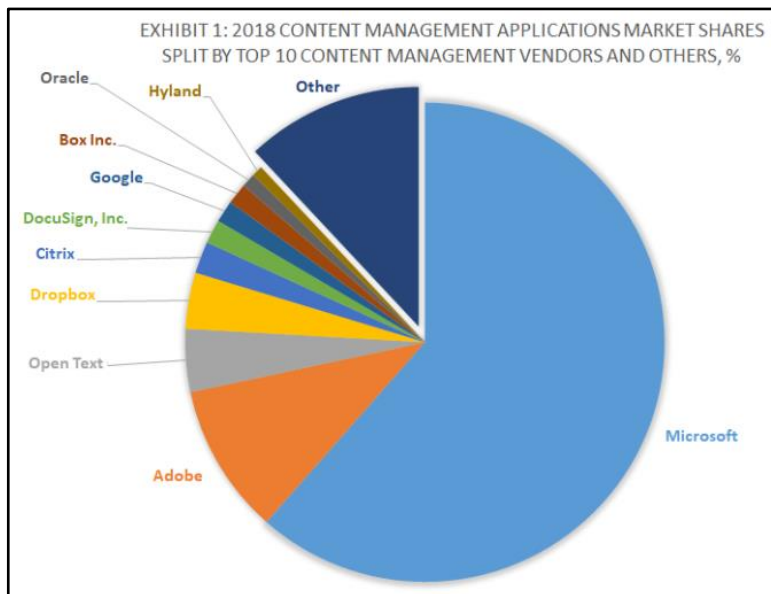
**Modernize**  
Business Solutions



# ECM/EDRMS: State of the Market



- The ECM market is expected to reach \$94.12 billion by 2026, with a compound annual growth rate of 15.8%
- Microsoft's market share growth continues at a significant rate
- Consolidation continues (e.g. OpenText/Documentum, Micro Focus/HP, Hyland/Perceptive)
- Market share of "big three" eroding: IBM FileNet in decline, OpenText acquired DELL EMC and Documentum, HP Autonomy sold to Micro Focus





# ECM/EDRMS: Office 365



## Gartner Says:

- “SharePoint reflects a **continuum of services across the entire content life cycle**, encompassing individual productivity, team collaboration, content management, process automation and workflow. It is enabled by a unified cloud-based platform that includes AI capabilities for content insight and process automation”
- “Reference customers **scored SharePoint highly** for its document handling functionality, metadata options and search, citing these as key features in developing corporate intranets”
- The Microsoft Graph **adds intelligence to content stored in OneDrive and other Office 365 data applications**. It enables deep insight into content that can enhance the user experience through smarter interactions. Microsoft Flow, by using the Microsoft Graph, can help automate content management and processing tasks.

Component	Provider	Technology
Repository	Microsoft	Office 365
Capture	KnowledgeLake	ML-Based Capture and Content Services
Workflow	Microsoft	Power Automate
Records Mgmt.	Gimmel	RIM Add-on
Signatures	DocuSign	Digital Signatures
Email Mgmt.	Harmon.ie	Outlook/O365 Integration
Identification	Netwrix	Auto-classification
Migration	ShareGate or SkySync	Content Migration

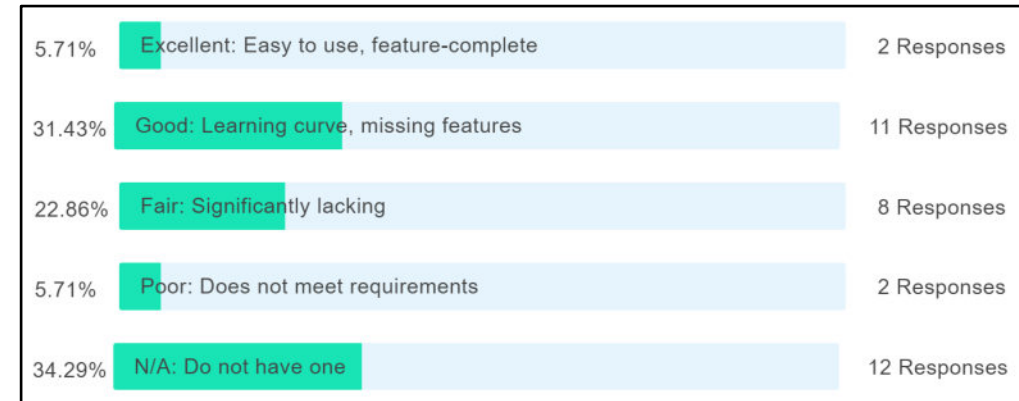


# Poll: Rate your Document Capture Product



- **Excellent:** Easy to use, feature-complete
- **Good:** Learning curve, missing features
- **Fair:** Significantly lacking
- **Poor:** Does not meet requirements
- **N/A:** Do not have one

## Survey Results



### Next Up:

- *Content Services Overview and Demos*





# AT A GLANCE

ESTABLISHED IN 1999

HEADQUARTERED IN ST. LOUIS, MO

TRANSACTIONAL CONTENT EXPERTS

FOCUSED ON REPLACING LEGACY ECM

2,000,000 USERS IN 35 COUNTRIES

PREFERRED PARTNER



FOUR TIME  
PARTNER OF THE YEAR

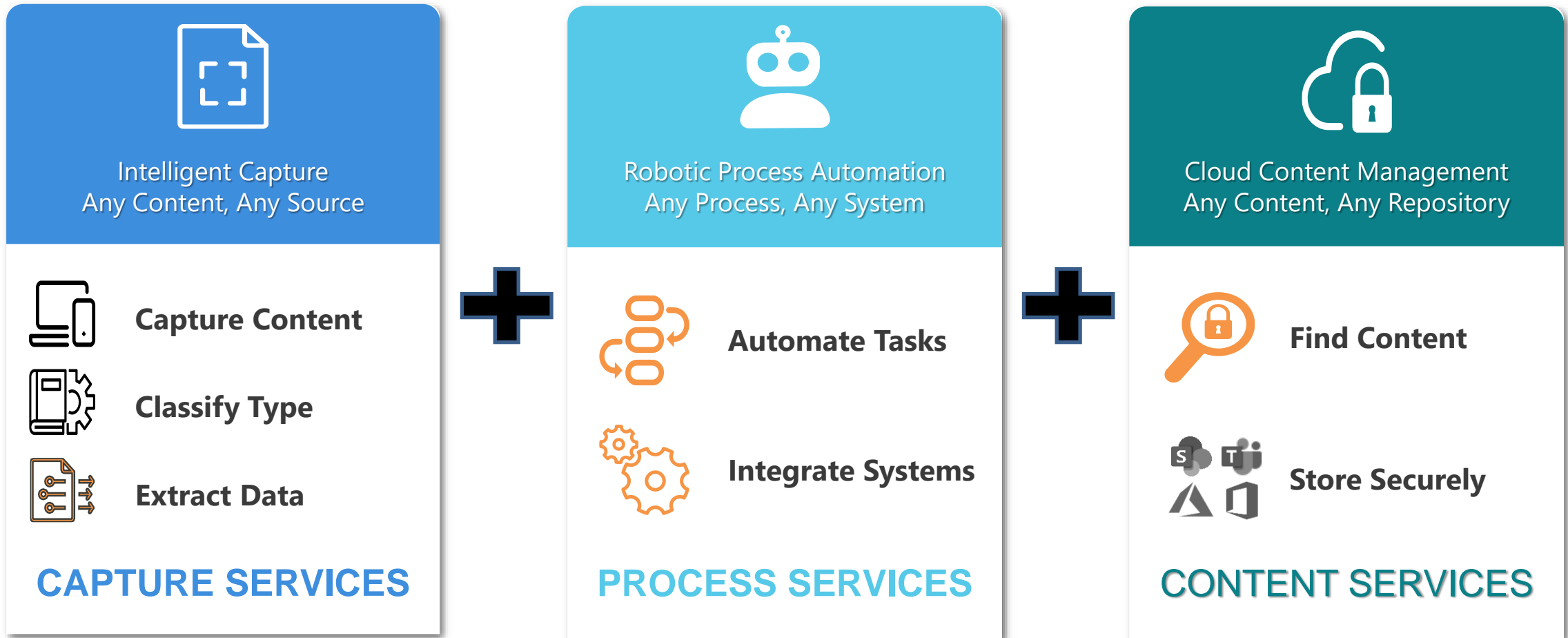


Gold Application Development  
Gold Cloud Platform  
Gold ISV

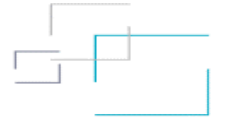
CAPTURE WORKFLOW REVISION



# KnowledgeLake: Product Overview



# KnowledgeLake: Demos



- Machine learning document capture
- Intelligent routing
- Document storage and retrieval

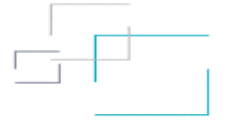


**Next Up:**

➤ *Closing and QA*



# Poll: How can we assist?



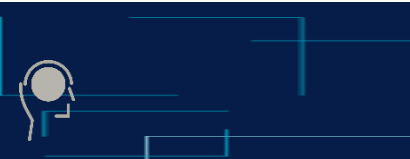
## Select all that Apply:

- Brainstorm / Answer Questions
- Schedule a Demo
- Project / Product Estimate
- Proof of Concept
- Sample RFP or Project Reference



### Next Up:

➤ *Closing and Extended QA*



# Resources: Webinars and Links



## Upcoming Webinars

- **New Webinar Series:** *Anatomy of an O365 Project from Inception to Production Launch - Begins in the New Year!*
- Inside look at our approach including:
  - The “Cookbook” for Project Estimation
  - Project Online, O365 Project Portals
  - Workflow for Status Report Generation, Meeting Curation, Change Request, etc.
  - Taxonomy Design and Development
  - Portal Deployment
  - Branding
  - Content Migration
  - Third-party applications (e.g. KnowledgeLake Gimmel, VisualSP, Plumsail, AquaForest, etc.)

## On the Web

- [KnowledgeLake Intelligent Content Automation](#)
- [Past Webinar Presentations and Recordings](#)
- [Managing Records in SharePoint and Office 365](#)



# Closing: Call to Action and *Extended* QA



## Contact us to:

- Brainstorm about your project/initiative
- Schedule an in-depth demo
- Get an estimate for a project
- Get pricing for a product we resell (e.g. VisualSP)
- Discuss a Proof of Concept
- Get a sample RFP solicitation
- Get information about successful O365 projects

## Contact Info:

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share<sup>2</sup>