

Microsoft®

Organization Size: 89,000 employees

Vertical Industries: Software and Services

Country/Region: United States

Organization Profile

Microsoft is the worldwide leader in software, services and solutions that help people and businesses realize their full potential.

Business Situation

After consolidating various document management systems to SharePoint 2010, Microsoft Legal and Corporate Affairs (LCA) wanted to provide its staff with effective email integration and an easy way to view both documents and emails in SharePoint.

Solution

To provide seamless integration between SharePoint and Outlook and a single view into SharePoint email and document repositories, Microsoft LCA deployed Colligo Contributor Pro.

Benefits

- Improved Outlook to SharePoint integration
- Single view into SharePoint
- Better search, eDiscovery and compliance

Software and Services

- Microsoft SharePoint 2010
- Colligo Contributor Pro

Microsoft Legal and Corporate Affairs Group Improves Document and Records Management with SharePoint 2010 and Colligo Contributor Pro

“Colligo’s easy-to-use interface allowed for swift training times and quick adoption.”

Microsoft is the worldwide leader in software, services, and solutions that help people and businesses realize their full potential. The Microsoft Legal and Corporate Affairs Group (LCA) works on the cutting edge of business and regulatory issues around the world, and supports Microsoft by pioneering solutions. In 2010, the LCA Information Management team undertook a major project to consolidate its existing document and records management systems to SharePoint 2010. LCA deployed Colligo Contributor Pro to integrate SharePoint and Outlook. Colligo Contributor helps LCA professionals easily move email and attachments from Outlook to SharePoint, and to accurately tag them with metadata. It also enables attorneys and legal staff to access SharePoint content from inside of Outlook.

About Microsoft Legal and Corporate Affairs Group

The Microsoft Legal and Corporate Affairs Group is a diverse and multi-disciplinary team of approximately 1000 attorneys, paralegals, and business professionals. The group operates from 88 cities in 45 regions worldwide. Microsoft LCA was named “Best Legal Department for 2010” by Corporate Counsel Magazine.

Application

Using Colligo Contributor Pro, Microsoft LCA professionals now enjoy extended features within their Outlook and SharePoint tools. These include “Drag & Drop” and “Send & File” capabilities from Outlook to SharePoint, automatic email metadata capture, enterprise metadata tagging, and accessing email and documents stored in SharePoint from within the Outlook interface.

Business Challenge

In early 2010, LCA set out to improve the consistency, predictability, and efficiency with which information assets are created, shared, secured, reused, and retained. At the time, several document management systems were being used, creating confusion and disorganization. One in particular contained 85,000 valuable documents that practitioners were unable to access due to compatibility issues.

“Our goal in the project was to consolidate all our various document management systems to SharePoint 2010 in order to take advantage of the new 2010 features for records management, enterprise-managed metadata, integration to Office applications, and search,” said Nishan DeSilva, Director of Information Management & Corporate Records Compliance in LCA. “Our aim was to utilize SharePoint 2010 to deliver a compliance-driven document, records and contract management solution that contains flexible taxonomies which corresponds to practice-level work.”

A priority requirement for LCA was to provide professionals with a single view into both the documents and email to be stored in SharePoint. Since email is an important part of the information assets being managed, integrating SharePoint with the Outlook 2010 interface to provide email drag-and-drop and automatic metadata capture capabilities was essential.

“Colligo allowed customer-facing users to access files on the road, making it easy to stay up-to-date.”

Solution: Colligo Contributor Pro for SharePoint

LCA chose Colligo Contributor Pro to provide the necessary Outlook to SharePoint integration. “Email management is an extremely important part of LCA’s SharePoint implementation, since the bulk of the information being communicated both within the department and externally comes in the form of email, or as attachments to email,” said DeSilva. “This email needed to be stored along with the other documents in a single view inside SharePoint, so getting email into SharePoint in an effective and efficient manner was critical to the success of the project.”

With Colligo Contributor, LCA’s legal and support staff are now able to drag-and-drop email from their Outlook inboxes into SharePoint document libraries. “Dragging and dropping from the inbox to a folder is a very natural process for our staff and the preferred method of moving content from Outlook into SharePoint,” said DeSilva.

The ability to easily tag email with accurate and consistent metadata was another important requirement for LCA. When moving email to SharePoint, Colligo Contributor automatically captures metadata and provides the ability for users to specify the content type. It also allows users to add enterprise-managed metadata from a term store. This metadata functionality helps to drive compliance, facilitate retention policies, enable better enterprise search, and reduce eDiscovery costs.

“One of the great benefits of Colligo Contributor is that you can access your entire SharePoint repository from inside of Outlook,” continued DeSilva. “This is a very powerful capability for our attorneys who live in the world of Outlook. With Colligo Contributor, they can work on their email and collaborate on documents at the same time, all from within the Outlook interface. There is no context shifting or need to change from one interface to another in order to access SharePoint.”

The now streamlined document management process has increased efficiency and improved collaboration at LCA offices.

Results

Deploying Colligo Contributor Pro has enabled Microsoft’s LCA to:

- Drive regulatory and corporate compliance, and reduce ediscovery costs
- Improve productivity, collaboration, and efficiency in the department
- Tag email as records from within Outlook to facilitate retention policies
- Access SharePoint repositories from Outlook, whether online or offline

Next Steps

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