

DOCUMENT REVIEW AND SHAREPOINT DOCUMENT COLLABORATION

- A WHITEPAPER

This whitepaper records the results of a survey of Microsoft SharePoint customers, conducted in October, 2011.

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Introduction

Almost every department in an organization produces documents of one type or another. Business users create technical documentation, brochures, reports, marketing material, contracts, proposals and much more. On the other hand, IT departments are tasked with the job of implementing the right software to produce and manage this huge array of content.

Whilst document creation and review is a critical business process, few recognise that it is one that is fraught with inefficiency and frustration. As such, most continue to work with manual processes or other workarounds, learning to live with the chaos of managing email attachments, copying and pasting edits into the original document, multiple review cycles, working with several versions of the same document, long review meetings and more.

However, there are solutions specifically designed to deal with this process. Software solutions support rather than hinder the collaboration process in document production, especially when this requires working with others outside the immediate area such as other departments, offices or third parties.

Microsoft SharePoint is widely acknowledged as a key player in the document management arena, and is marketed as a business collaboration platform for the storing, management and sharing of content. As such it is used to promote the controlled sharing of documents which can be downloaded for authoring and review. In addition, SharePoint 2010 used in conjunction with Office 2010, has co-authoring functionality.

Many SharePoint customers are therefore intrinsically involved in document production and through them we can learn more about their attitude towards the document review process. This includes understanding their position when considering third party applications within the SharePoint context and gaining a viewpoint on SharePoint's collaboration capabilities.

The survey

During October 2011, Microsoft hosted its international conference in Anaheim, California USA, whilst the leading independent SharePoint event in Europe took place the same month in Berlin, Germany. Both provided a forum for SharePoint customers and IT professionals to learn more about SharePoint 2010, to network and hear from key Industry speakers.

PleaseTech Ltd attended these events as an exhibitor, conducting an attendee survey at both. With over 7000 attendees in the USA and nearly 1000 in Europe, we were able to reach a wide cross section of SharePoint enthusiasts from various industries. It should be noted that there was a significantly higher proportion of USA respondents vs. European.

This whitepaper documents the results of this survey both from a business user¹ and IT professional standpoint, from which we were able to draw conclusions. Far removed from the marketing hype and assumptions that usually provide the backdrop to software purchasing decisions, this whitepaper provides concrete evidence to help influence future purchasing decisions and ensure a realistic view of Microsoft's collaborative capabilities.

About PleaseTech

PleaseTech Ltd is a technology company specializing in software solutions for the collaborative review and authoring of documents.

PleaseTech is a Microsoft partner and its review and co-authoring solution, PleaseReview, is integrated with both SharePoint 2007 and 2010.

¹ Please note that the term 'business user' refers to participants who classified themselves as business users.

Key findings

Identical surveys were carried out in the USA and Europe, so making it possible to compare data across geographies. Where applicable, respondents could select multiple answers.

- Nearly 80% state that document creation and review plays either a significant or a part of their job.
- 9 out of 10 experience issues with their current document review process and nearly all would consider an alternative review solution.
- A third of US respondents use an alternative document system in addition to SharePoint, whereas most Europeans use only SharePoint.
- Integration with the SharePoint system is a key factor when considering 3rd party applications.
- Two thirds of business users state that SharePoint is widely accepted and used, whereas IT professionals are more critical, stating that user adoption of SharePoint is an issue within their organization.
- IT professionals agree that user adoption is an important factor when researching alternative document collaboration systems, closely followed by the system's ROI.
- Most agree or remain neutral on the statement that SharePoint provides the collaborative capabilities needed when working with others within or outside the organization.
- Participants (particularly business users) have a surprisingly simplistic view as to what constitutes collaboration.
- Nearly three quarters of business users stated they would use SharePoint more if it had the functionality to help with specific business issues.
- The majority of those attending these conferences are SharePoint advocates, as they are involved in either the decision to implement SharePoint or are involved in its roll-out across the organization. As such, one may have expected a more enthusiastic endorsement of its capabilities and therefore we conclude that there is a good opportunity for 3rd party applications that provide specific advanced functionality.

Results

Profile

83% of respondents are from an IT background - the remaining 17% are SharePoint analysts/customers.

Participants who classified themselves as business users are thought, given the nature of the conferences, to be business analysts, business representatives or those involved directly in SharePoint projects rather than line of business managers.

Of those surveyed, only 6% did not know/do not use SharePoint. The remainder mostly use either SharePoint 2010 or a mix of both SharePoint 2010 and 2007 across their organization.

Two thirds of respondents do not use any other document system in addition to SharePoint. Of those that do, most cited EMC Documentum and OpenText Livelink as their alternative system.

It is interesting to note that one respondent in the USA asked if we wanted the 'politically correct answers' or the 'real answers' and, if the latter, responses would have to be anonymous.

Document review

The majority of respondents stated that they were involved in document review and whilst satisfaction is high with their existing document review solution, nearly all business users (95.5%) experience issues when working in collaboration with others on the review (fig 1).

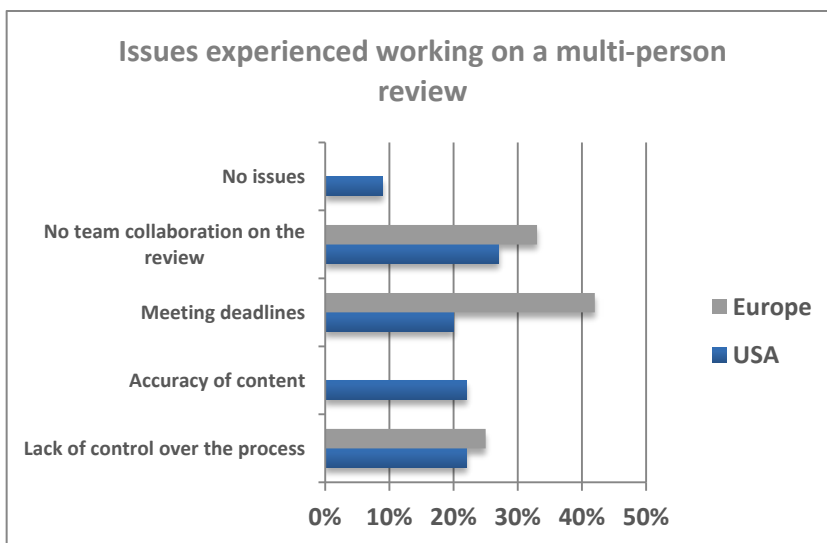


Figure 1: when multiple people are involved in a document review, what issues do you experience? (Respondents could make multiple selections)

As such, nearly all would consider an alternative review solution. Improved collaboration, improvements to their existing process, ease of use and time savings were the most important considerations (fig.2).

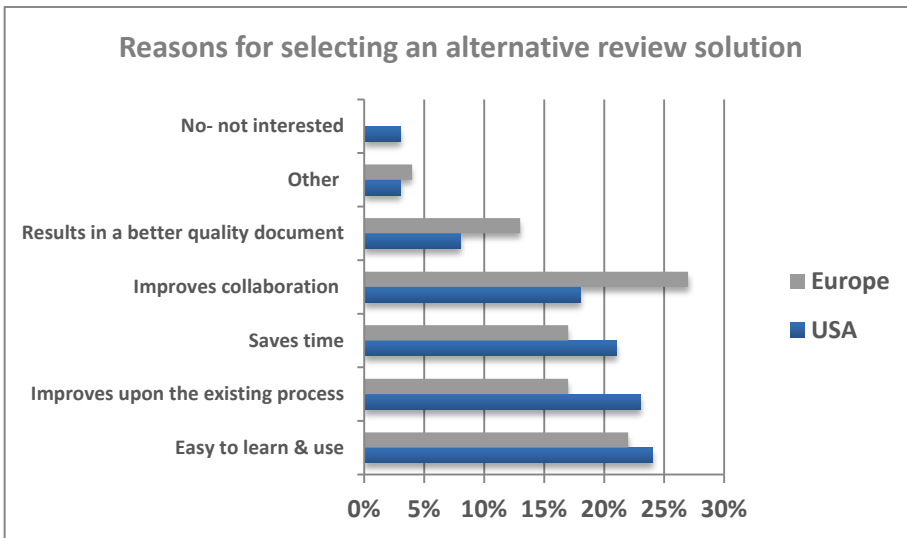


Figure 2: would you consider an alternative document review solution if it...? (Respondents could make multiple selections)

Unsurprisingly, according to IT users, maintenance and administration overheads and ability to integrate with other document systems were the priority when considering third party applications to improve document collaboration (fig. 4).

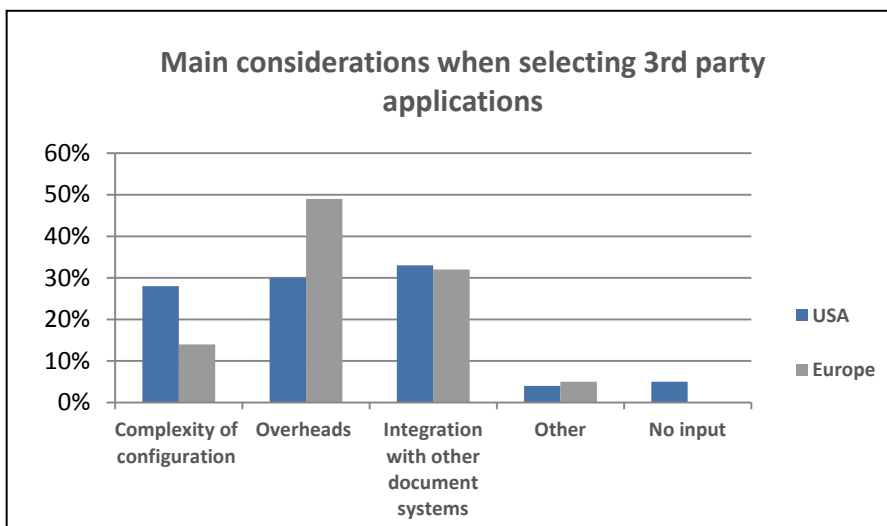


Figure 4: what are the main considerations when selecting 3rd party applications to improve document collaboration? (Respondents could make multiple selections)

Please note the full choices were:

- Complexity of configuration
- Maintenance/administration overheads
- Integration with SharePoint & other legacy document systems
- Other
- No input from respondent.

The two key reasons for organizations to research an alternative document collaboration system, according to IT professionals, were potential user adoption of the new system and its return on investment (fig. 5).

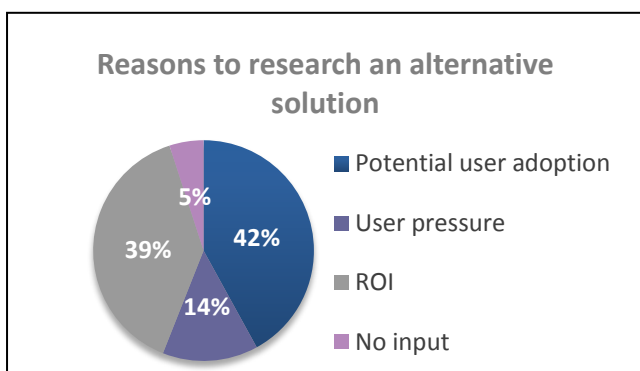


Figure 5: what reasons influence the decision to research an alternative document collaboration?

SharePoint collaboration

Amongst business users of the system, it was agreed that SharePoint is widely accepted and used across their organization (fig. 6).

In contrast, nearly half the IT professionals stated that SharePoint adoption is an issue within their organization (fig. 7).

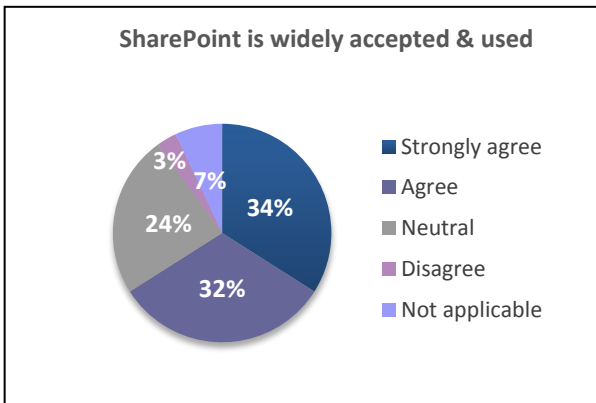


Figure 6: SharePoint is widely accepted and used within our organization. (Business users)

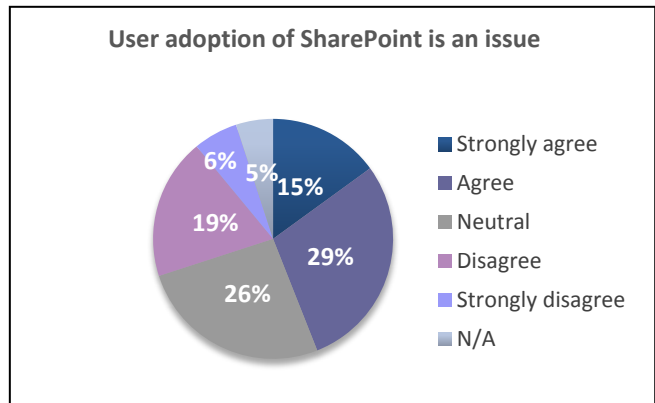


Figure 7: user adoption of SharePoint is an issue within our organization. (IT professionals)

As a generic collaboration tool, SharePoint does provide the collaborative capabilities required when working with others, both within and outside the organization (fig. 8 & 9).

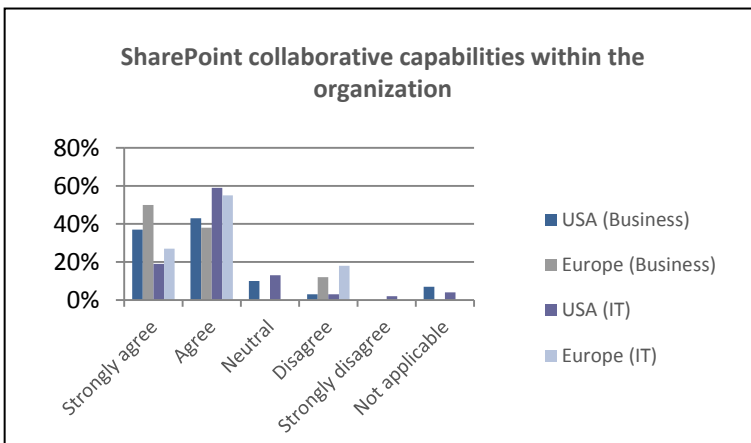


Figure 8: SharePoint provides the collaborative capabilities we need within the organization.

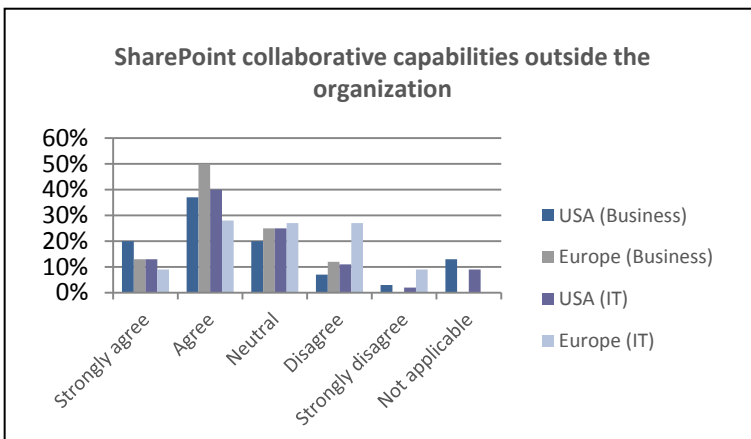


Figure 9: SharePoint provides the collaborative capabilities we need when working with others outside the organization.

Until SharePoint 2010, sequential access to a document was the only way to collaborate. IT professionals were divided on whether this could be called 'collaboration' with most remaining neutral or in disagreement (fig. 10). As sequential viewing is a very rudimentary form of collaboration, anything beyond this would surely be considered advanced.

SharePoint 2010 introduced a co-authoring functionality, allowing multiple users to simultaneously co-author Word documents. Over half the business users like this functionality, although many felt it was not applicable to their role (fig. 11).

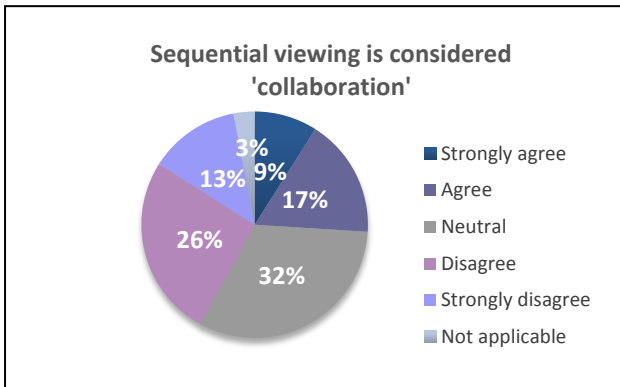


Figure 10: IT professionals - Sequential viewing of a document is considered to be 'collaboration'.

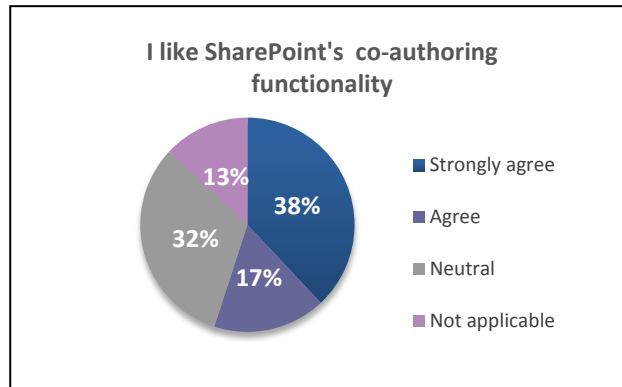


Figure 11: Business users - I like the document co-authoring functionality in SharePoint 2010.

Four out of five respondents did state that they would use SharePoint more if it had the functionality to help with specific business issues (fig. 12).

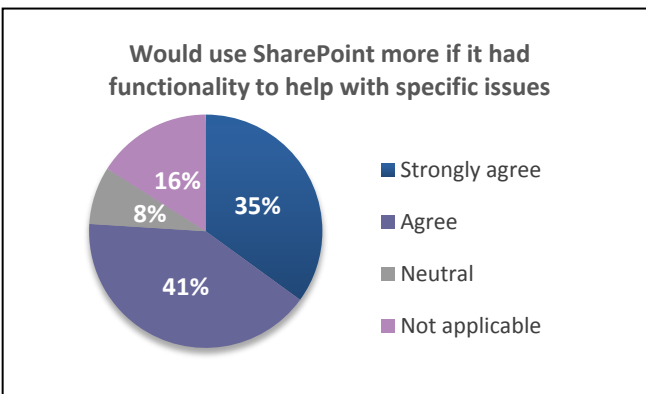


Figure 12: I would use SharePoint more if it had the functionality to help me with specific business issues.

Conclusion

The results from the survey highlighted some interesting issues:

Despite perceived satisfaction with their document review solution, the majority still experience issues. This leads us to conclude that participants currently accept these issues as a necessary evil, without being aware that the process could be markedly improved.

Conference attendees could be considered SharePoint advocates. As such, one may have expected a more enthusiastic endorsement of its capabilities although it is refreshing that an honest assessment is being made in the industry.

Lack of team collaboration and meeting deadlines received the highest accumulated scores for issues experienced when working on a multi-person review. This leads us to conclude that whilst SharePoint does provide general collaborative capabilities, this is not the case for document review, resulting in more time spent on the review (and therefore making it harder to meet deadlines).

Most would consider an alternative review solution, indicating that there is dissatisfaction with their current process. Taking into account issues currently experienced and reasons for selecting an alternative solution, time savings, ease of use, greater control and improved collaboration are all important considerations.

IT professionals are more concerned with cost savings and integration capabilities when selecting a third party application, although user adoption is a key factor to consider when actually making the selection for an alternative document collaboration system. Therefore, whilst responsible for sourcing alternative solutions, the IT department acknowledges that it must consider how the solution meets their user needs in addition to their own internal requirements. As such, 3rd party organizations should address solution benefits to both line of business end users and IT communities.

Whilst the term 'collaboration' is widely used, these survey results indicate respondents' expectations are low with regard to collaboration. Over 25% at least agreeing that sequential viewing (and thus sequential review) of a document is collaboration and a further 32% remaining neutral on the subject. Whilst 39% disagree that sequential viewing/reviewing can be termed 'collaboration', we conclude that a considerable amount of education is still required in the SharePoint community as to the benefits of simultaneous and interactive collaboration on a document. An advanced collaborative review solution goes a long way beyond sequential review and would certainly resolve many of the document review issues recorded in this whitepaper.

In conclusion, although SharePoint is acknowledged as a collaboration platform, by facilitating collaboration with specialist third party applications, specific business processes such as document creation and review can be transformed. Such a process enhancement would demonstrably save the organization time and money, users would have access to extensive, easy-to-use functionality and the IT department would have a scalable enterprise solution which would help drive adoption of the SharePoint system.

As a result of this survey's results, PleaseTech intends to further develop the discussion and will conduct a survey at Microsoft's upcoming SharePoint conferences to benchmark the maturity of various collaboration tools and further understand the importance of collaboration and how it impacts our business processes.

About PleaseReview

PleaseReview enables the simultaneous review and collaborative authoring by multiple individuals of Microsoft Word, Excel, PowerPoint, PDF, images and other document types. It facilitates the review and co-authoring of documents within an organization (inside or outside the corporate firewall) and/or with external parties such as customers, partners and suppliers.

In addition to PleaseReview's unique collaborative review environment, it offers full management and control, comment and change reconciliation, comprehensive reporting and is available integrated with leading Document & Content Management Systems, including Microsoft SharePoint.

The co-authoring feature allows a document to be edited simultaneously by different contributors, who can edit sections of the document whilst the review is under way. In this manner, an edited section can be made available for review, and edited again taking into consideration reviewers' comments and changes.

PleaseReview is a proven solution which can reduce review cycles by up to 65% and provides a significant ROI by delivering typical savings of 35% in review costs. Its success is based on several key benefits:

- It is simple and intuitive to use, promoting rapid user adoption
- Reviewers can truly collaborate on the review, avoiding duplication and generating ideas
- All users have access to the same copy of the document, thus avoiding version control issues
- Staff spend less time on the review, resulting in greater productivity
- It is quick for authors to review and consolidate reviewer comments and changes
- By offering secure access to the document, PleaseReview ensures document confidentiality
- Document integrity is maintained thanks to PleaseReview's reporting capabilities which capture all activity on the review.

Customers agree that PleaseReview has dramatically improved their review and co-authoring process, with some reviews, which previously took days, being completed in a matter of hours. They also testify that their users have an 'instant love of the product' thanks to its ease of use and collaborative features.

For more information, please visit: www.pleasetech.com or email: info@pleasetech.com