

# Document Management for Abila MIP

## The SharePoint Integration

### For Telephone Audio

Dial: (646) 307-1706

Access Code: 110-062-900

Audio PIN: Shown on your  
Webinar Panel

### Technical Difficulties

Dial: (805) 617-7000 (Option 1)

Other Inquiries email:

[egolant@netatwork.com](mailto:egolant@netatwork.com)

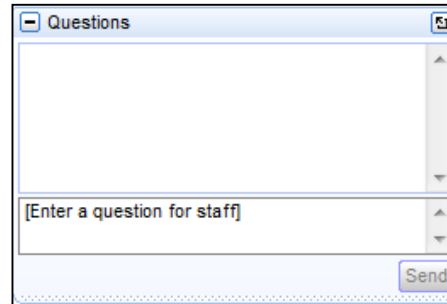
Webinar ID: 629512912

# Webinar Details

Presentation is roughly 1 hour and will be recorded

All phone lines are muted

If anyone has any questions during this webcast – please type them in your question box located at the bottom of your webinar panel



A screenshot of a 'Questions' panel. The panel has a title bar with a minus sign, the word 'Questions', and a maximize icon. Below the title bar is a large, empty text area for typing questions. At the bottom of the panel is a smaller text input field containing the placeholder text '[Enter a question for staff]'. To the right of this input field is a 'Send' button. An arrow points from the text 'your webinar panel' in the previous block to the 'Questions' panel.

# Today's Presenters



Kyle Conquy  
*ECM Practice Director*  
Net@Work



Jeannie Huckstep  
*Nonprofit Solutions  
Practice Director*  
Net@Work

# Agenda

Who is Net@Work?

The reality of  
information management

Why SharePoint?

SharePoint and Abila...together

ConnectPoint demo

Closing - Q&A

# Who is Net@Work?

Founded On A Dedication  
To Customer Satisfaction



- Founded in 1996

- A Top **Abila**  
Certified Partner



- A **Microsoft** Gold  
Competency Partner

**Microsoft Partner**  
Gold Server Platform  
Silver Collaboration and Content  
Cloud Accelerate

- Full range of IT services and solutions
- National offices - NY (HQ), NJ, CT, MA, MI, MO, NC, TX, WA, WI, ON-Canada

# Net@Work Solutions



## ERP/Accounting Implementations

(Sage ERP X3, Sage 500, Sage 300,  
Sage 100 Sage PFW, Sage Pro)



## CRM Implementations

(Sage CRM, SalesLogix, Act!)



## HRMS/Employer Implementations

(Sage HRMS)



## Web Development & eCommerce

(Magento, Joomla)



## Mobile Application Development

(Windows 8, Android, iOS)



## ECM Implementations

(Microsoft SharePoint, FileBound, Altec doc-  
link, Kofax Capture, PSIGEN PSI:Capture)



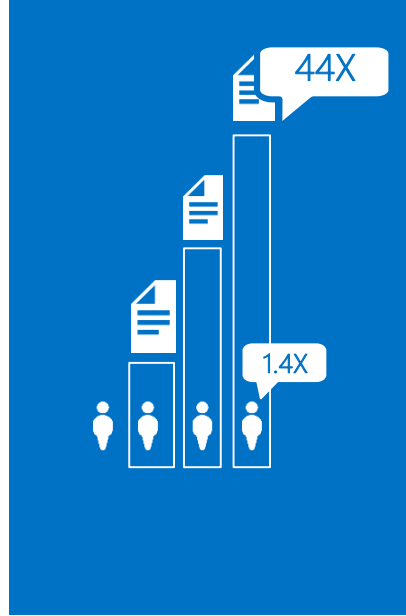
## Business Intelligence, Analytics & Reporting



## IT Infrastructure & Managed Services

(Office 365, Virtualization,  
Windows/Server)

# Communication Challenges



# Challenges of Managing Documents



Multiple tools and systems



Difficult to track versions



Obtain proper reporting



Maintain consistent security



Many types of content



Users perform tasks differently



Accurate auditing

Managing Documents

Business Processes



# SharePoint...What and Why?

SharePoint is a strategic **PLATFORM** that increases organizational knowledge through highly secure and compliant collaboration and information-sharing.

Using SharePoint →

- You can easily share information with others.
- Relevant information and content can be centrally stored and maintained.
- Manage documents from start to finish.
- Access data from other applications.
- Publish reports and dashboards to make better decisions.
- Seamlessly integrates with Windows and MS Office.

# Streamline common tasks

The screenshot displays the Microsoft Office 365 SharePoint interface. At the top, the navigation bar includes 'Office 365', 'Mail', 'Calendar', 'People', 'Newsfeed', 'Documents', and 'Sites'. The user profile 'Steven McQueen' is visible on the right. Below the navigation bar, the 'FILES' tab is selected, showing a document library for 'Contoso Architecture'. The library contains a list of documents, with 'Building Better Windmills' selected. A preview of this document is shown on the right, displaying a page titled 'Building Better Windmills' with placeholder text. The preview includes a 'Shared with' section listing 'Mary Smith', 'Don Johnson', and 'Shawn Ruger', and a 'Last modified' section showing 'by Mary Smith, Today at 2:30 pm'. A callout box points to the 'EDIT SHARE FOLLOW' buttons at the bottom of the preview, indicating that these actions can be performed with one click. Another callout box points to the document preview itself, indicating that it is a 'Live document preview'. A third callout box points to the 'new document or drag files here' button, indicating that content can be dragged and dropped into the library. A fourth callout box points to the 'EDIT LINKS' button in the left sidebar, indicating that links can be edited.

Office 365

Mail Calendar People Newsfeed Documents Sites ... Steven McQueen

BROWSE FILES LIBRARY

Contoso Inc. Fabrikam Team McQueen Industries

Contoso Architecture

+ new document or drag files here

All Recent Changed by me ... Find file

Name

Air Source & Energy

Modelling Energy

Building Better Windmills

Examples of Building Better Windmills

Sustainability

Green Vendors

Green Architecture and Design

Tips and Tricks when building green

8 ways to build beter green buildings

Building Green Initiative

Green Building Incentives That Work: A Look at How Loc...

Meetings and Notes on Green Design

EDIT LINKS

Building Better Windmills

Page 1 of 1

Shared with

Mary Smith, Don Johnson, Shawn Ruger, and 5 others Full List

Last modified

by Mary Smith, Today at 2:30 pm Undo changes

Location

http://my/mansharma/buildingbetterwindmills/folderone...

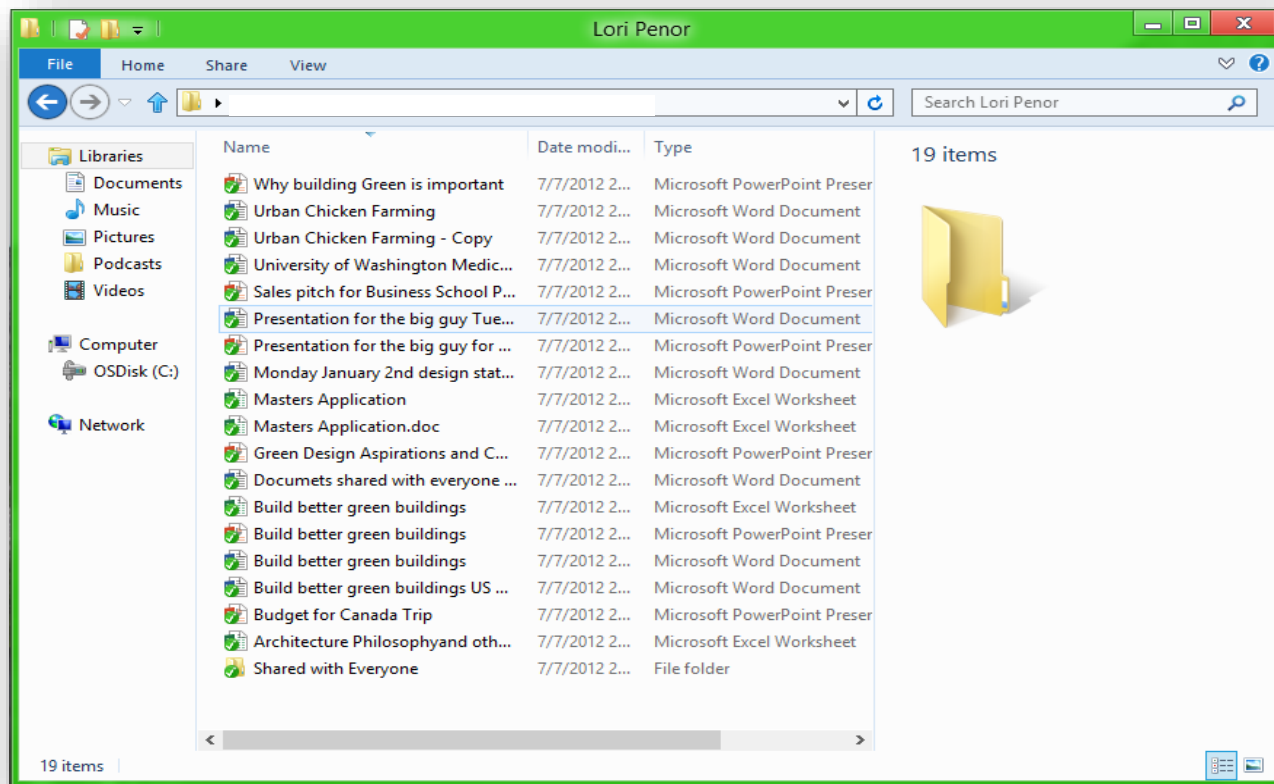
Drag and drop content into SharePoint

Live document previews

Edit, share or follow documents with one click

Track who you're sharing with

# Store, sync and share



# Organize content and process

Office 365

Outlook Calendar People SocBrand Documents Sites ...

Lori Penor

BROWSE FILES LIBRARY

Contoso Inc. Fabrikam Team McQueen Industries

Contoso Architecture

Home

Notebook

Documents

Recent

Calendar

Tasks

Team mailbox

More apps

EDIT LINKS

new document or drag files here

All Recent Changed by me ... Find file

Name	Modified	Modified by	Status
Air Source & Energy	10/21/2011	Frank Martinez	Pending Review
Modelling Energy	10/22/2011	Ellen Adams	Pending Review
Building Better Windmills	10/22/2010	Mark Hanson	Approved
Examples of Building Better Windmills	10/23/2011	Armando Pinto	Approved
Sustainability	10/24/2010	Mark Hanson	Pending Review
Green Vendors	10/18/2010	Ellen Adams	Pending Review
Green Architecture and Design	5/16/2010	Frank Martinez	Approved
Tips and Tricks when building green	12/21/2009	Armando Pinto	Pending Review
8 ways to build beter green buildings	12/18/2009	Mark Hanson	Approved
Building Green Initiative	10/9/2010	Ellen Adams	Approved
Green Building Incentives That Work: A Look at How Loc...	8/6/2010	Ellen Adams	Approved
Meetings and Notes on Green Design	8/4/2011	Frank Martinez	Approved

Organize all your team communications in one place

Create simple document workflows

# Secure content

The screenshot displays the Microsoft Office 365 interface. At the top, the navigation bar includes links for Mail, Calendar, People, Newsfeed, Documents, and Sites. The user's name, Steven McQueen, is in the top right corner. Below the navigation bar, the left sidebar shows a list of documents, with 'Building Better Windmills' selected. The main content area shows a list of documents under the heading 'Contoso Architecture'. A dialog box titled 'Share 'Building Better Windmills'' is open in the center. The dialog box has a close button (X) in the top right corner. It shows the document is shared with 'Yong Rhee, Tom Ham, Maria Cameron and 4 more' and a 'View everyone' link. Below this, there is a section 'Invite people' with a text input field 'Type names or email addresses' and a dropdown menu 'can Edit'. A mouse cursor is pointing at the text input field. Below the input field is a text area 'Include a personal message with this invitation (Optional)'. At the bottom of the dialog box, there is a checkbox 'Require sign-in' which is checked, and a 'SHOW OPTIONS' link. There are 'Share' and 'Cancel' buttons at the bottom right of the dialog box. Three blue callout boxes with white text and blue dots pointing to specific elements are overlaid on the image: one pointing to the 'Share' button, one pointing to the 'can Edit' dropdown, and one pointing to the 'Require sign-in' checkbox.

Share documents with people inside and outside your organization

Manage permissions

Enforce sign-in to comply with data governance and protection policies

# e-Discovery

Office 365 Preview

Outlook Calendar People Newsfeed SkyDrive Sites ... Diane Forsyth

SHARE

Case-Northwind Traders Home

## Northwind Traders

Discovery Sets  
Queries  
Sources  
Exports  
Documents  
Site Contents

Discovery Set Name \* Northwind Traders

### Sources (Add & Manage Sources)

Name	Source Type
Katie Jordan	Exchange Mailbox
Northwind Traders	SharePoint
Sara Davis	Exchange Mailbox
Alex Darrow	Exchange Mailbox
Denis Dehenne	Exchange Mailbox
Molly Dempsey	Exchange Mailbox

Filter

Enter free-text query terms

Search syntax and tips

### In-Place Hold

Certain sources such as SharePoint and Exchange can be preserved in place. This will protect content in its original location so if it is modified or deleted it will be retained in a secure location. If a source does not support in-place hold, you can export the content and place it in a secure location to protect it.



☒ Enable In-Place Hold  
☐ Disable In-Place Hold

Preview Results Save Cancel

### Add & Manage Sources

Mailboxes  
Specify Exchange mailboxes using names or email addresses.



- ☒ Katie Jordan
- ☒ Sara Davis
- ☒ Alex Darrow
- ☒ Denis Dehenne
- ☒ Molly Dempsey



 

[Add an additional mailbox](#)

Locations  
Enter URLs to specify SharePoint sites & file shares that are indexed by Search. SharePoint site sources will include all sub sites. File share sources will include all folders underneath the specified folder.

- ☒ Northwind Traders

[Add an additional location](#)

OK Cancel

Support for e-discovery across Exchange, Lync and SharePoint

Add mailboxes, SharePoint sites and file shares

Manage content retention policies

# Enterprise search

Office 365

Mail Calendar People Newsfeed Documents Sites ... Steven McQueen ▾

🔍

Result type

Microsoft Word

Adobe PDF

Microsoft Excel

Microsoft PowerPoint

more...

Site

Author

Modified

1 year ago

Today

All

Green thermal

Everything People Videos Conversations Reports

Recommendations

Get recommendations based on your search query

Infrared thermal scanning

With computer/tech problems, furniture, facility **thermal** issues cabling.

portals/itweb/ ... /archive/B85 Heating Packet.doc

CRITICAL IMAGING

Thermographic



Re-find information based on your historical search behavior

Looking for these again

Environmental Engineering Conference.ppt

www.portals/itweb/.../Environmental\_Engagement/twotimesthefun/Thermalunderm..

Conservation and Environmental Research.doc

www.Conservation and Environment/color/studyofthermallimaging/research

Environmental Green Conference research part b\_10552


www.portals/technology/greenpeaceEnvironmentalThermalImaging/solvesplanemso...

📄

Green spectrum analysis

Turbine systems, furniture, facility **thermal** issues cabling. Your not suppo...

www.turbine sys/ ... /largerThanLife\_archive/B85 Heating Packet.doc



Thermal Engineering Conference.ppt

Walker started at Vanderbilt in 2001 and has built a research group to study small-scale energy transport phenomena and novel heat flux...

www.portals/itweb/EnvironmentalImagingForThermal/Environmental...

Green spectrum analysis

Microsoft Word 153K

Page 1 of 1

Take a look inside

Thermal Figures for Q2

Lead Management Systems

RF&F Thermal Sustainability

Urban Conservation

Popularity

See 1,867 times, 256 in the last two weeks

Last modified

10:30 AM Today

Contributors include

Mandar Naik, Belinda Karasec

OPEN VIEW LIBRARY SEND ...

Drill to the detail inside documents to help you find answers

# Business intelligence

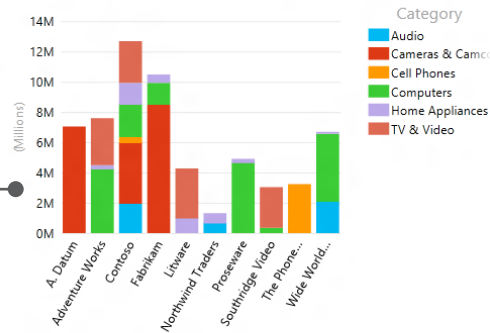
Customize and publish your reports to SharePoint

## Sales Analysis Report

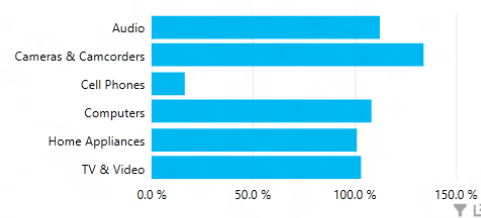
Average of SATScore by RegionCountry



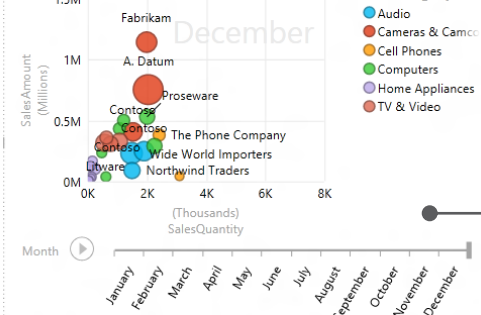
TotalSalesAmount by Brand, and Category



GrossMargin by Category



SalesQuantity, SalesAmount, and Margin by Brand, and Category



### Filters

VIEW | CHART

Brand

- (All)
- A. Datum
- Adventure Works
- Contoso
- Fabrikam
- Litware
- Northwind Traders
- Proseware
- Southridge Video
- The Phone Company
- Wide World Importers

Category

Margin

Month

SalesAmount

SalesQuantity

Analyze trends

### Power View Fields

ACTIVE | ALL

- Time
  - Date
  - Datekey
  - DayOfWeek
  - Mon
  - ☒ Month
  - MonthNum
  - Quarter
  - Week
  - WeekNum
  - Year

Drag fields between areas below:

TILE BY

Not available with play axis

Σ X VALUE

SalesQuantity

Σ Y VALUE

SalesAmount

Σ SIZE

Margin

DETAILS

Brand

COLOR

Category

PLAY AXIS

Month

VERTICAL MULTIPLES

A track scrollable with values menu

Create interactive charts and reports

CSAT Analysis

Sales Analysis

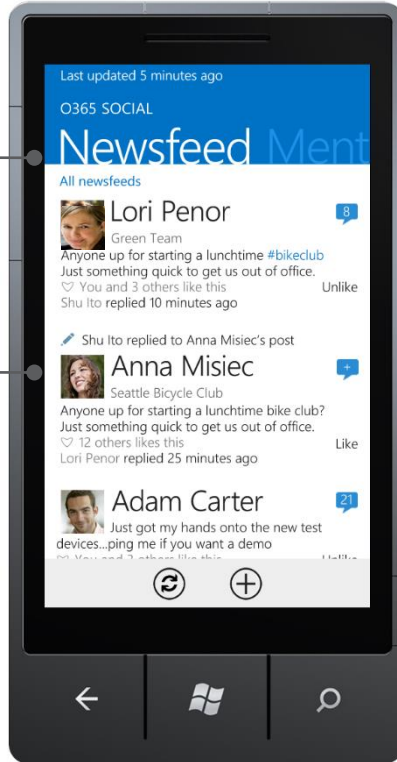
Customers



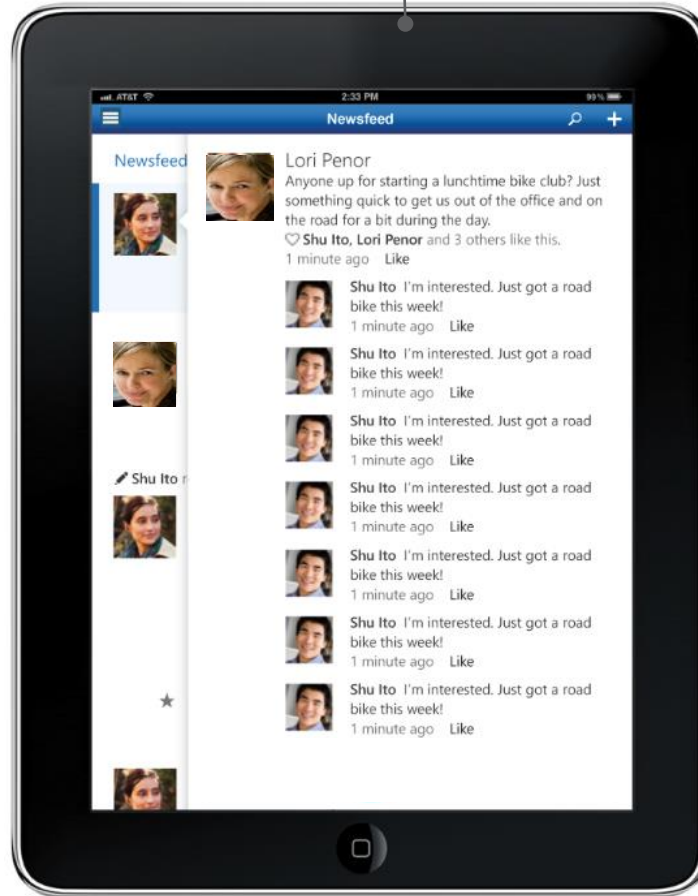
# Mobile

Post updates to your newsfeed

Stay in sync with what's happening across the organization



Support for IOS devices



# ECM and Abila...together

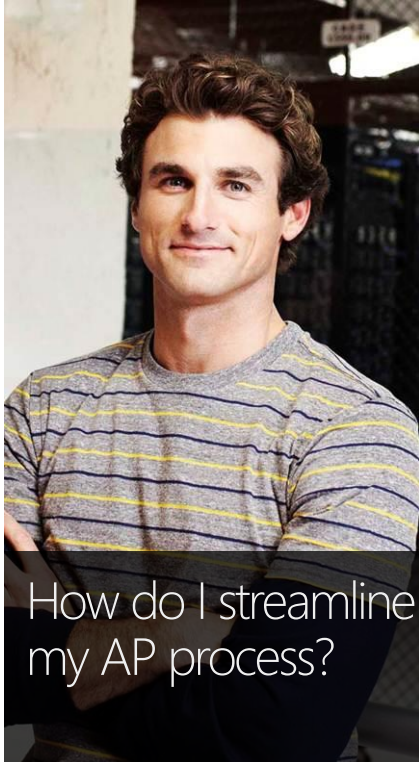


**ConnectPoint** is an integration tool designed to connect your **Abila MIP** software with Microsoft **SharePoint** Document Management.

Integration with **Abila MIP** ↔ **ConnectPoint**

- Automatically pass data between systems.
  - Push appropriate data into Abila MIP
  - Pull appropriate data into SharePoint
- Validate metadata (index) fields.
  - Reduce human error
- Leverage data for workflows, approvals, alerts and reporting.
  - Pre-approve data before it's created in Abila MIP

# ConnectPoint Process



## Seamless AP Processing

- Reduce the amount of paper & storage
  - Capture the electronic document & index
  - Store the documents in a repository
- Faster response times with improved efficiency
  - Automate the approval process
  - Review, approve & push to SharePoint
- New invoices are automatically created in Abila MIP Fund Accounting
- Access invoices & related documents

# ConnectPoint Viewer

Office365

OutlookCalendarPeopleYammerSkyDriveSites...

John Doe

BROWSEPAGEFILESLIBRARY

ConnectPoint for Abila MIPConnectPoint ViewerEDIT LINKS

Search this site

My Queue

Search

new document or drag files here

	Name	Content Type	Modified	ConnectPoint Approval
	Bell.pdf	ConnectPoint_AP_Invoice	2 minutes ago	Initial Approval
	Invoice 123.pdf	ConnectPoint_AP_Invoice	3 minutes ago	Initial Approval
	UPS.pdf	ConnectPoint_AP_Invoice	About a minute ago	Initial Approval
	UPS-10001.pdf	ConnectPoint_AP_Invoice	About a minute ago	Initial Approval

Document

Net@Work

575 8th Ave New York, NY 10001  
Tel 555-555-5555 Fax 555-555-5555

INVOICE 123

10.30.2013

BILL TO	SHIP TO	INSTRUCTIONS
ABC Company 123 Street New York, NY 10001	Same as recipient	N/A

Line Items

new item or edit this list

Line Item Description	Effective Date	Amount	Cost Center	Fund	Department	GLAccount	Workflow Status	Invoice
Office Supplies	10/30/2013	\$495.00	208	90	308	13501	Finalized	Invoice 123
Software Licenses	10/30/2013	\$2,000.00	208	90	308	13501	Finalized	Invoice 123
Blade Server	10/30/2013	\$6,000.00	208	90	308	13501	Finalized	Invoice 123

Metadata

Related Documents

Name	Invoice 123.pdf
Vendor	NAW
Invoice #	123
Invoice Date	10/30/2013
Header Description	Invoice 123
Received Date	10/30/2013
Cost Type	Capital Purchase
Invoice Type	Standard
Invoice Amount	\$9,348.93
PO Number	
Document ID	FZ74SQCTXHH7-3-13
Assigned To	

# ConnectPoint Search

Office 365 Outlook Calendar People Yammer SkyDrive Sites John Doe

BROWSE PAGE FILES LIBRARY

ConnectPoint for Abila MIP [ConnectPoint Viewer](#) EDIT LINKS

## ConnectPoint Viewer

My Queue Search

invoice 123

Result type

All

PDF

Author

Ben Walker

David Aronow

SHOW MORE

Modified date

One Year Ago Today

Preference for results in English

**Invoice 123**  
123 Street ...  
[netatwork212.sharepoint.com/sites/\\_/DropOffLibrary/Invoice 123.pdf](#)

1 result

Preferences Advanced Search

### Invoice 123

PDF

Tools Sign Comment

1 / 1 50.2%

Net@Work

Net@Work  
525 4th Ave New York, NY 10001  
Tel 555-555-5555 Fax 555-555-5555

**INVOICE 123** 10.30.2013

BILL TO	SHIP TO	INSTRUCTIONS
ABC Company 123 Street New York, NY 10001	Same as Bill/Ship	N/A

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL
1	Office Supplies	495.00	495.00
100	Software Licenses	20.00	2000.00
1	Blade Server	6000.00	6000.00

Results from this site

**Invoice 123**

OPEN FOLLOW SEND

# ConnectPoint Indexing

The screenshot displays the Office 365 interface with a document library and a 'Drop Off Library' form for 'Invoice 123.pdf'.

**Office 365 Interface:**

- Navigation:** BROWSE, PAGE, FILES, LIBRARY.
- Actions:** New Document, Upload Document, New Folder, Edit Document, Check Out, Check In, Discard Check Out, Open & Check Out, View Properties, Edit Properties, Shared With, Delete Document, Manage, Share.
- My Queue:** Search, new document or drag files here.
- Document List:**

Name	Content Type	Modified	ConnectPoint Approval
Bell.pdf	ConnectPoint_AP_Invoice	2 minutes ago	Initial Approval
Invoice 123.pdf	ConnectPoint_AP_Invoice	3 minutes ago	Initial Approval
UPS.pdf	ConnectPoint_AP_Invoice	About a minute ago	Initial Approval
UPS-10001.pdf	ConnectPoint_AP_Invoice	About a minute ago	Initial Approval

- Metadata:**

Name	Value
Name	Invoice 123.pdf
Vendor	NAW
Invoice #	123
Invoice Date	10/30/2013
Header Description	Invoice 123
Received Date	10/30/2013
Cost Type	Capital Purchase
Invoice Type	Standard
Invoice Amount	\$9,348.93
PO Number	
Document ID	FZ74SQCTXH7-3-13
Assigned To	

**Drop Off Library - Invoice 123.pdf:**

- Actions:** Save, Cancel, Paste, Copy, Delete Item, Commit, Clipboard, Actions.
- Content Organizer:** This document will be automatically moved to the correct library and folder after required properties are filled out.
- Form Fields:**

Field	Value
Content Type	ConnectPoint_AP_Invoice
Name	Invoice 123.pdf
Vendor	NAW
Invoice #	123
Invoice Date	10/30/2013
Header Description	Invoice 123
Received Date	10/30/2013
Cost Type	Capital Purchase
Invoice Type	Standard
Invoice Amount	9,348.93
PO Number	
Assigned To	John Doe

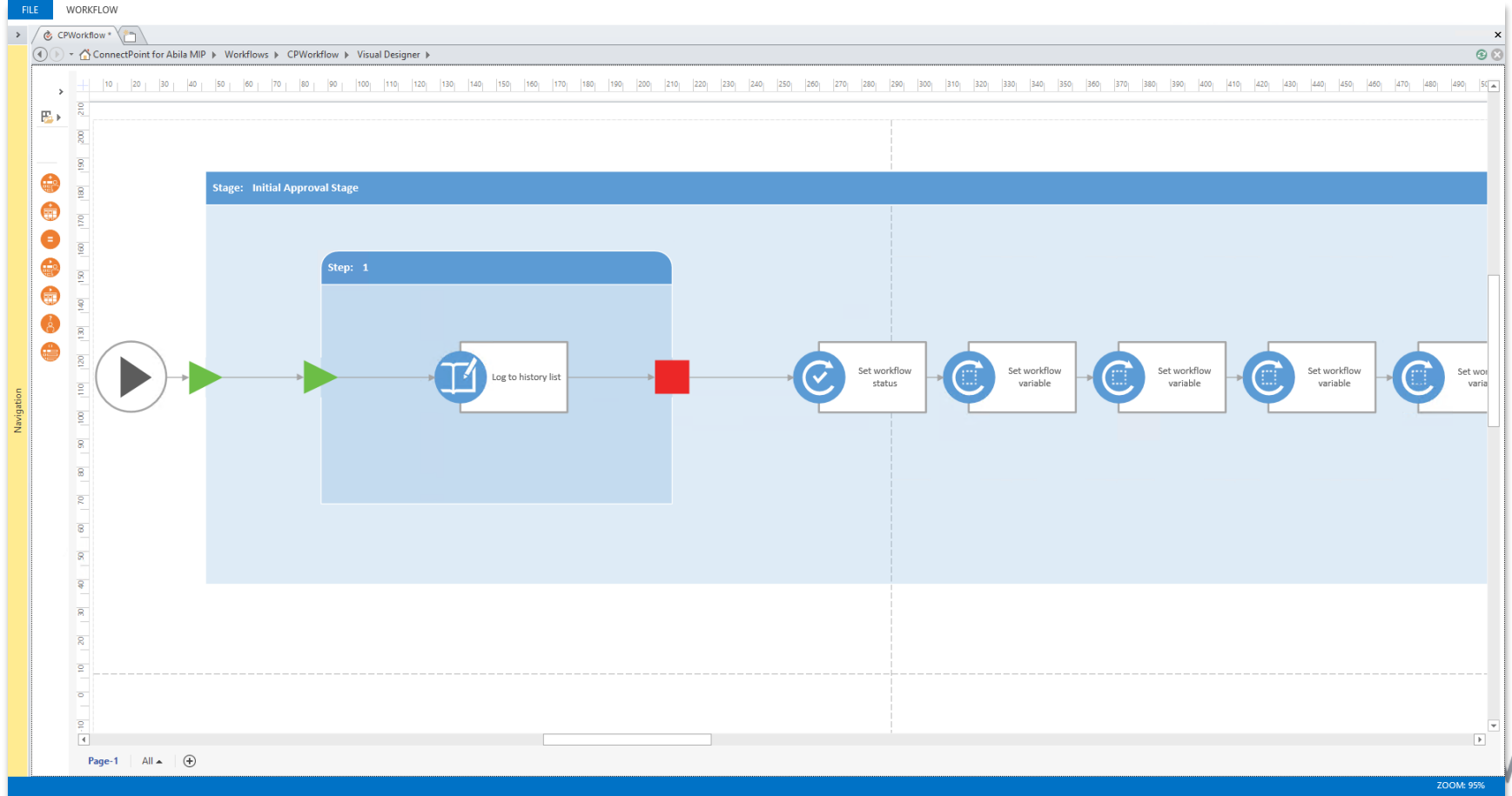
- Footer:** Created at 10/30/2013 11:48 AM, Last modified at 10/30/2013 1:14 PM by Workflow.

**Net@Work:**

- Workflow Status:**

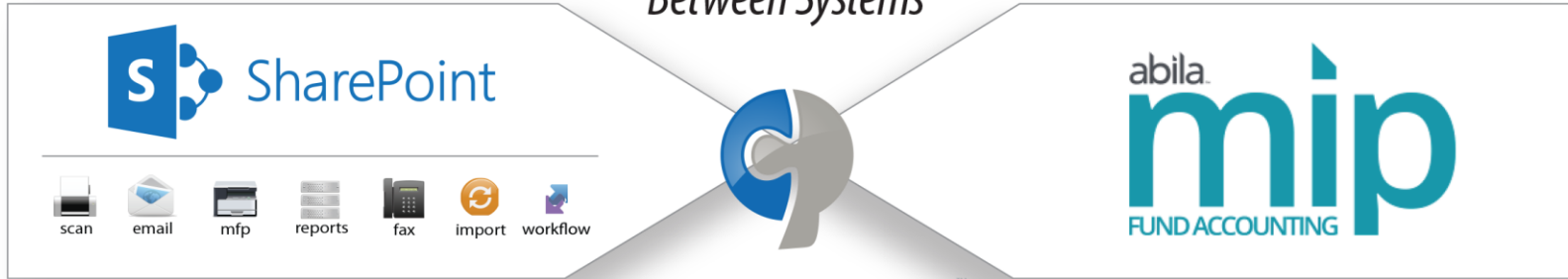
Workflow Status	Invoice
501 Finalized	Invoice 123
501 Finalized	Invoice 123
501 Finalized	Invoice 123

# ConnectPoint Workflow



# Demo

*Capture and Index* ↔ *Automatically Pass Data Between Systems* ↔ *Search and Retrieve*



**ConnectPoint™**

Microsoft SharePoint® is the most popular document management solution in the world, facilitating data sharing across organizations of all sizes.

ConnectPoint™ brings these two powerhouses together; creating a seamless, intuitive integration that supports, promotes, and enforces your organization's workflows.

Abila MIP Fund Accounting is the solution you use for the tools and functionality your organization needs to manage operations and grow success.



# ConnectPoint Solution Summary

## Document Management

Reduce paper – centrally store and manage documents with full lifecycles

Documents are accessible through any web browser

TRUE document management – version control, retention, disposition

Facilitate structured document authoring and collaboration

Archive or dispose of documents with full rules/routing management

## Automate Business Processes

Approve invoices, purchase orders, proposals, etc.

Automated document routing to appropriate people and departments

Automatic notifications and alerts

Move content through the defined lifecycle

Full workflow history and auditing

ConnectPoint  
ECM

## Integration with Systems

Pull information from a system – validated metadata

Push information to a system – reduce data entry

Automate document indexing

Leverage data to automate processes

Preserve system security

## Enterprise Search

Easily search and retrieve relevant documents

Configurable search scopes to target specific departments

Proactive feed updates for your documents

Full security trimming on all searchable content

Web analytics to understand what your employees are looking for

# Thanks for attending

*For additional information, please contact:*

Kyle Conquy, Net@Work

ECM Practice Director

[kconquy@netatwork.com](mailto:kconquy@netatwork.com)

# Q&A

