

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

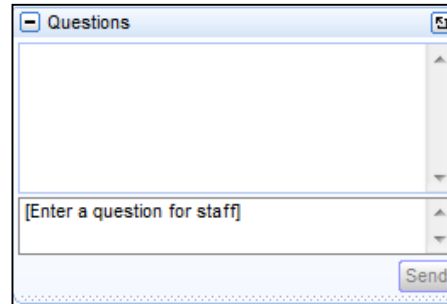
Webinar ID: 629512912

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 web interface element titled "Questions". It features a large, empty text input area for typing questions. Below the input area is a smaller text field containing the placeholder text "[Enter a question for staff]". To the right of the input area is a vertical scrollbar. At the bottom right of the panel is a "Send" button. An arrow from the text above points to the top-left corner of this panel.

Today's Presenters



Jeannie Huckstep
*Nonprofit Solutions
Practice Director*
Net@Work



Kyle Conquy
ECM 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)

ECM and SharePoint Practice

Enterprise Content Management (ECM)

- Document management
- Records management
- Workflow and process management

SharePoint (2003, 2007, 2010, 2013)

- Intranet, extranet and portal solutions
- Document and records management solutions
- Website and branding solutions
- Full custom development and consulting
- End to end support for SharePoint
 - On premise
 - In the **Cloud** with **Office 365** (SharePoint online)

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

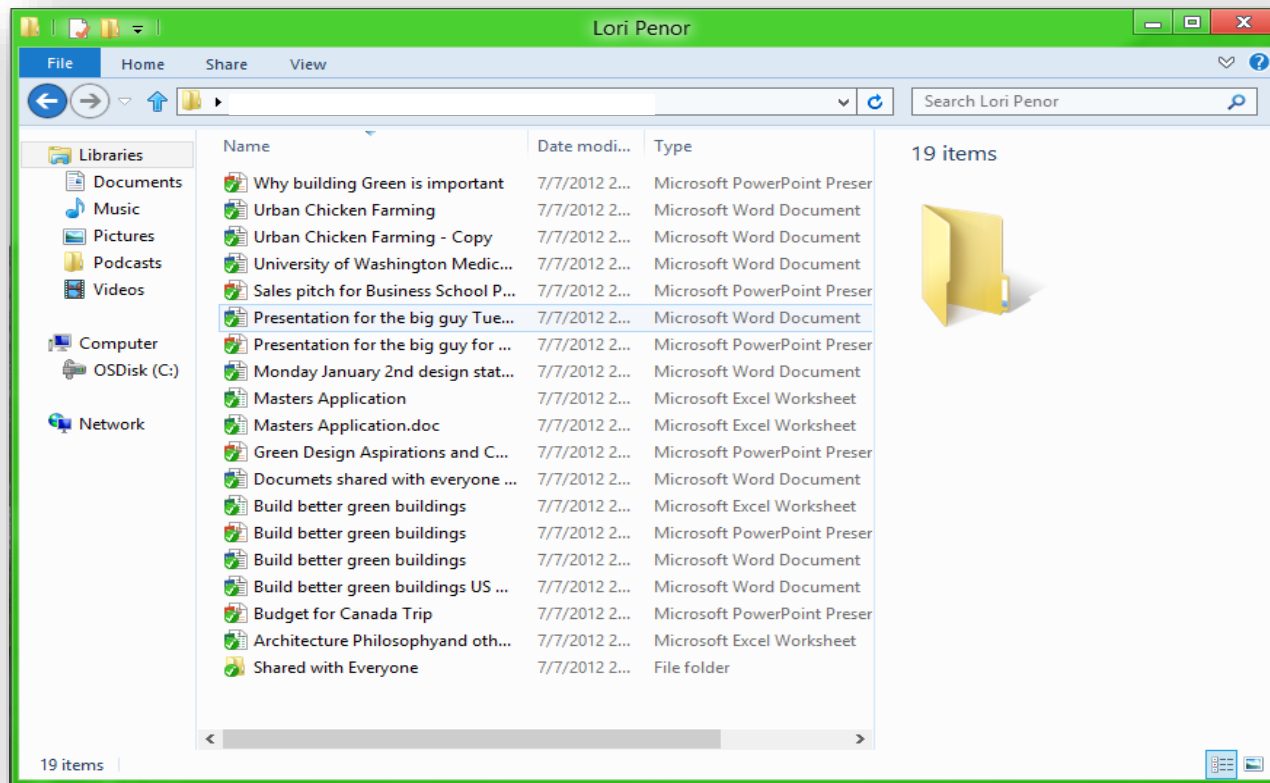
SharePoint...What and Why?

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.

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

Create simple document workflows

Organize all your team communications in one place

Secure content

The screenshot displays the Microsoft Office 365 interface. At the top, the navigation bar includes 'Office 365', 'Mail', 'Calendar', 'People', 'Newsfeed', 'Documents', and 'Sites'. The user's name 'Steven McQueen' is visible in the top right. Below the navigation bar, the 'BROWSE' tab is active, showing a list of documents under the heading 'Contoso Architecture'. A document titled 'Building Better Windmills' is selected. A dialog box titled 'Share 'Building Better Windmills'' is open, showing sharing options. The dialog includes a 'Shared with' section listing 'Yong Rhee, Tom Ham, Maria Cameron and 4 more', an 'Invite people' section with a text input field and a 'can Edit' dropdown menu, a 'Require sign-in' checkbox, and 'Share' and 'Cancel' buttons. Three blue callout boxes with white text and blue dots pointing to specific elements in the dialog box provide annotations: 'Share documents with people inside and outside your organization' points to the top of the dialog; 'Manage permissions' points to the 'can Edit' dropdown; and 'Enforce sign-in to comply with data governance and protection policies' points to the 'Require sign-in' checkbox.

Share documents with people inside and outside your organization

Share 'Building Better Windmills'

Shared with Yong Rhee, Tom Ham, Maria Cameron and 4 more View everyone

Invite people

Type names or email addresses can Edit

Include a personal message with this invitation (Optional)

Require sign-in

SHOW OPTIONS

Share Cancel

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

Case-Northwind Traders Home

Northwind Traders

Discovery Set Name * Northwind Traders

Discovery Sets
Queries
Sources
Exports
Documents
Site Contents

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

Manage content retention policies

Add mailboxes, SharePoint sites and file shares

Enterprise search

Office 365 | Mail | Calendar | People | Newsfeed | Documents | Sites | Steven McQueen

Green thermal

Everything | People | Videos | Conversations | Reports

Result type: Microsoft Word, Adobe PDF, Microsoft Excel, Microsoft PowerPoint, more...

Site: Environmental Engineering Conference.ppt, Conservation and Environmental Research.doc, Environmental Green Conference research part b_10552

Author: Looking for these again

Modified: 1 year ago, Today, All

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

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/EnvironmentallmagingForThermal/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.

Drill to the detail inside documents to help you find answers

Business intelligence

Customize and publish your reports to SharePoint

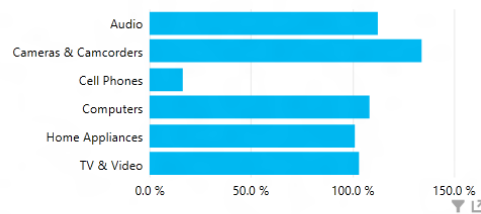
Sales Analysis Report

Average of SATScore by RegionCountry

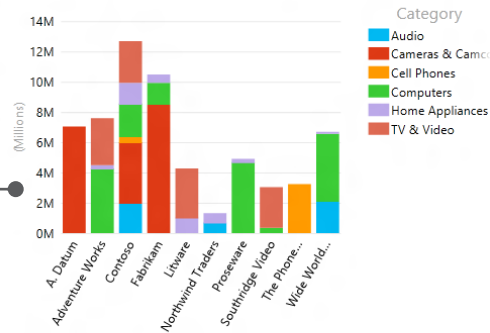


SalesAmount: \$61,177,141.72
SalesQuantity: 267827

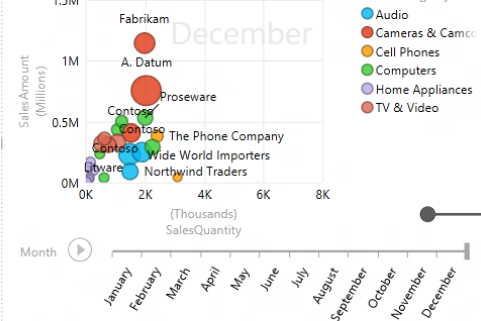
GrossMargin by Category



TotalSalesAmount by Brand, and Category



SalesQuantity, SalesAmount, and Margin by Brand, and Category



Filters

VIEW | CHART

Brand

(All)

Search...

- (All) 132
- A. Datum 192
- Adventure Works 665
- Contoso 267
- Fabrikam 264
- Litware 47
- Northwind Traders 244
- Proseware 125
- Southridge Video 152
- The Phone Company 173
- Wide World Importers

Category

(All)

Margin

(All)

Month

(All)

SalesAmount

(All)

SalesQuantity

(All)

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

Not available with play axis

Create interactive charts and reports

CSAT Analysis

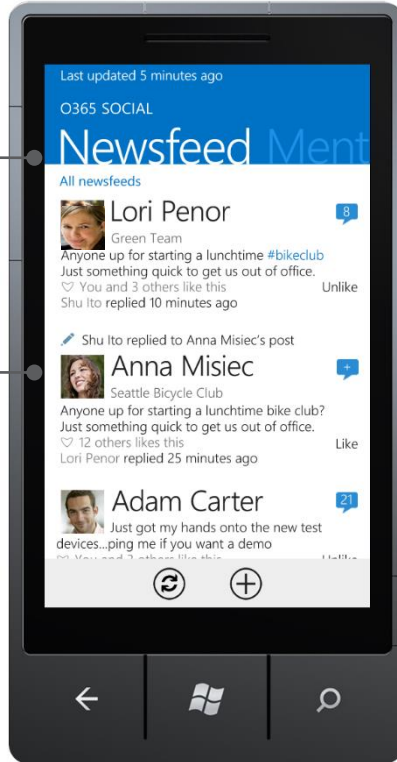
Sales Analysis

Customers

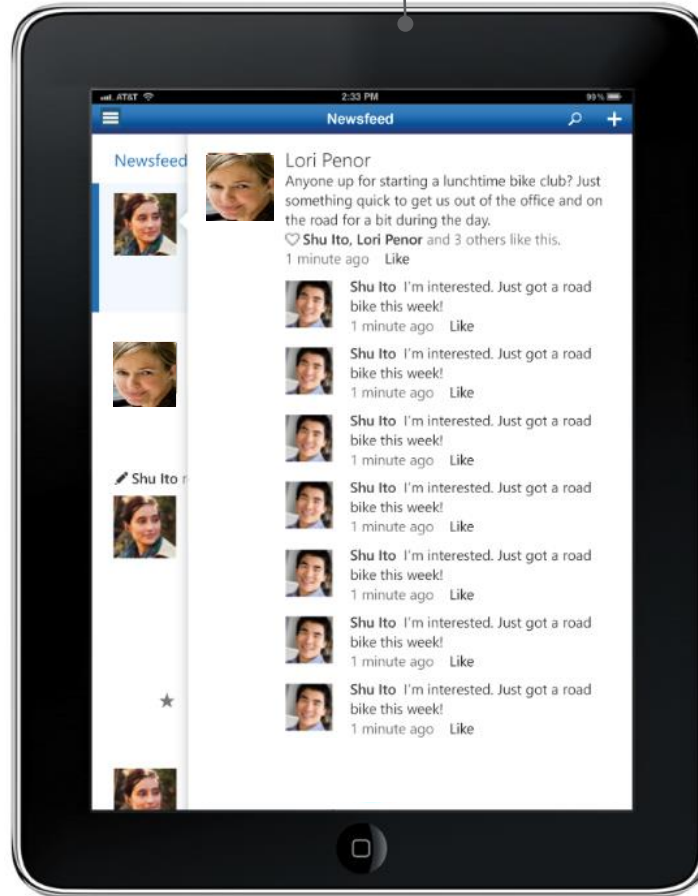
Mobile

Post updates to your newsfeed

Stay in sync with what's happening across the organization



Support for IOS devices



ECM and Abila...together

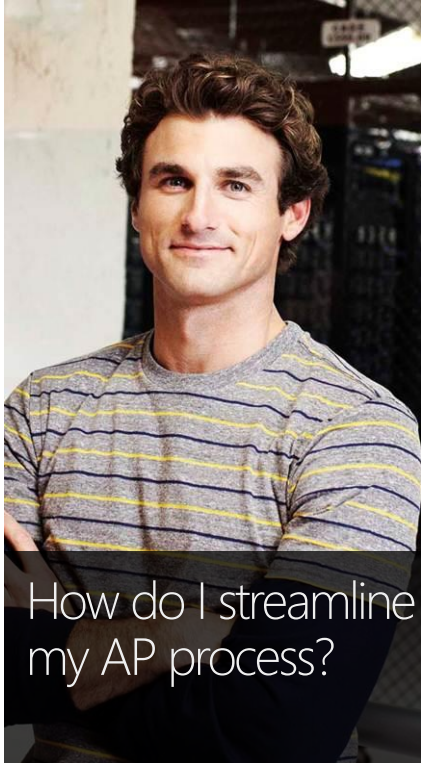


ConnectPoint is an integration tool designed to connect your **Abila MIP** software with Microsoft **SharePoint** Document Management.

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 Outlook Calendar People Yammer SkyDrive Sites John Doe

BROWSE PAGE FILES LIBRARY

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

Search this site

ConnectPoint Viewer

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

Net@Work

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

Office365 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

Result type

All

PDF

Author

Ben Walker

David Aronow

SHOW MORE

Modified date

One Year Ago Today

All

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

1 / 1 50.2%

Tools Sign Comment

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 recipient	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 upload dialog box open. The background shows a document viewer for 'Net@Work' dated 10.30.2013. The dialog box, titled 'Drop Off Library - Invoice 123.pdf', contains a metadata form for indexing the document.

Drop Off Library - Invoice 123.pdf

Content Organizer: This document will be automatically moved to the correct library and folder after required properties are filled out.

Form Fields:

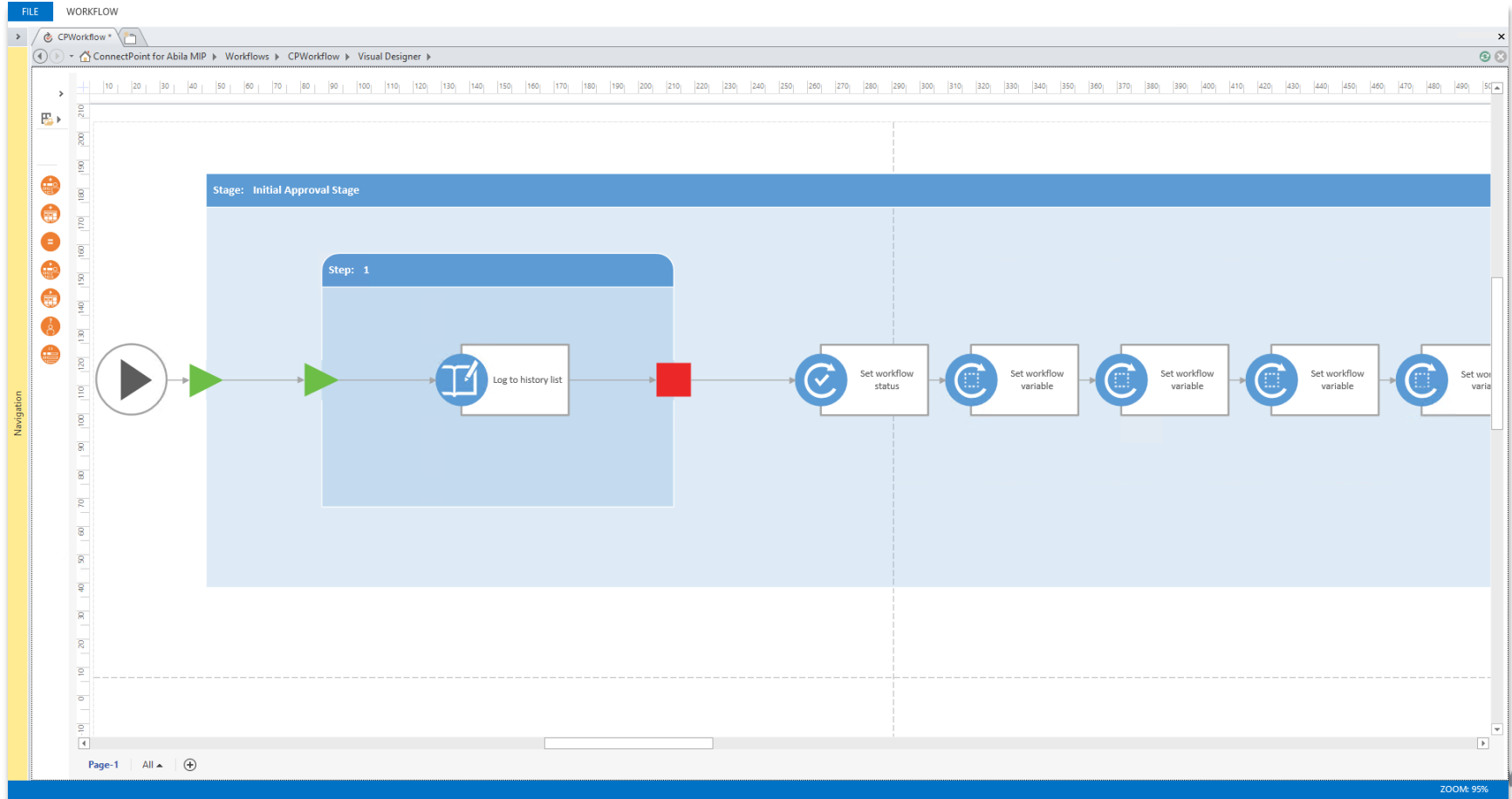
- Content Type:
- Name: .pdf
- Vendor:
- Invoice #:
- Invoice Date:
- Header Description:
- Received Date:
- Cost Type:
- Invoice Type:
- Invoice Amount:
- PO Number:
- Assigned To:

Created at 10/30/2013 11:48 AM
Last modified at 10/30/2013 1:14 PM by Workflow

Background Document Viewer:

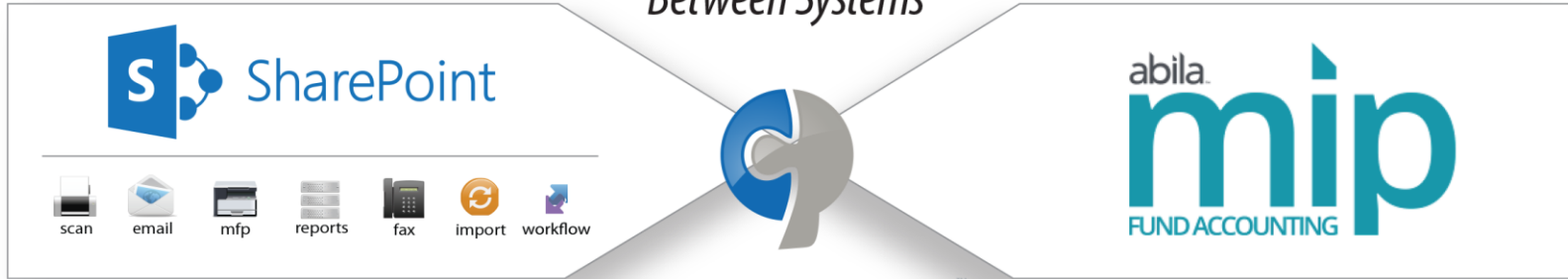
Net@Work
10.30.2013
INSTRUCTIONS
Workflow Status Invoice ▼
501 Finalized Invoice 123
501 Finalized Invoice 123
501 Finalized Invoice 123

ConnectPoint Workflow



Demo

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



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; ceating 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

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

ConnectPoint
ECM

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

Q & A

