



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

Microsoft Legal and Corporate Affairs Group (LCA)

"With Colligo Contributor, it is so easy to drag and drop email from Outlook to SharePoint and tag them with consistent metadata. The ability to access SharePoint from inside Outlook and the 'Send & File' feature are two capabilities our attorneys absolutely love. Colligo Contributor was critical to the success of the LCA Group's SharePoint 2010 project."

Nishan DeSilva

*Director of Information Management &
Corporate Records Compliance
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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. To provide seamless integration between SharePoint and Outlook and a single view into SharePoint email and document repositories, LCA deployed Colligo Contributor Pro. Colligo Contributor provides LCA professionals with a way to easily move email and attachments from Outlook to SharePoint and to tag them with accurate and consistent 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 and operates from 88 cities in 45 countries/regions worldwide. Microsoft LCA was named "Best Legal Department for 2010" by Corporate Counsel Magazine.

Application

Microsoft LCA employees utilize Colligo Contributor Pro for "Drag & Drop" and "Send & File" capabilities from Outlook to SharePoint, automatic email metadata capture and enterprise metadata tagging, and to access 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. Several document management systems in use were a major contributing factor to the challenge that LCA faced. One in particular, Autonomy's iManage WorkSite, contained 85,000 documents that were still of business value, even though practitioners were unable to access the system since 2008 due to compatibility issues.

"Our iManage solution was complex, highly customized, and expensive to support," said Nishan DeSilva, Director of Information Management & Corporate Records Compliance in LCA. "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. 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 business 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.



Solution: Colligo Contributor Pro for SharePoint

To provide the necessary Outlook to SharePoint integration for the project, LCA chose Colligo Contributor Pro. "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. "These 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 able to drag and drop email from their Outlook inboxes into SharePoint document libraries that are linked inside the Outlook folder tree. "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. "Whether it's moving an email itself or an email along with an attachment, the drag-and-drop process is simple, fast, and effective."

In addition to efficiently moving email into SharePoint, the ability to easily tag these email with accurate and consistent metadata was another important requirement for LCA. When moving email to SharePoint, Colligo Contributor automatically captures email properties as metadata and through its metadata editor, provides the ability for users to specify the content type and 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."

"Another important capability of Colligo Contributor is the 'Send & File' feature that provides the ability to automatically save email to SharePoint while sending from Outlook. Suggested filing locations based on recently used folders or recent email threads, along with automatic metadata capture, makes it really easy to use. This is an extremely powerful feature that saves both time and keystrokes and one that our attorneys absolutely love."

"Colligo Contributor provides LCA with the seamless integration of Outlook to SharePoint that we required for a successful project. Its 'Drag & Drop' and 'Send & File' features make it easy for our staff to get email into SharePoint and its advanced metadata capabilities ensure consistent tagging and the integrity of the email. The ability to access SharePoint from Outlook is a huge benefit as our attorneys can move an email into SharePoint, tag it with metadata, and declare it as a record, all without leaving Outlook."

Results

Deploying Colligo Contributor Pro has enabled Microsoft's LCA professionals to:

- "Drag & Drop" and "Send & File" email and attachments directly from Outlook to SharePoint
- Automatically capture email metadata for better search, eDiscovery, and compliance
- Easily add additional enterprise managed metadata via the metadata editor
- Move email and tag them as records from within the Outlook interface
- Access SharePoint repositories from Outlook, whether online or offline
- Improve productivity, collaboration, and compliance in the department