

ELO for SharePoint

ECM functionality for Microsoft SharePoint 2013



More functionality for greater effectiveness

ELO ECM for Microsoft SharePoint 2013

The ELO Enterprise Content Management (ECM) systems offer all necessary functions to effectively manage and control information throughout its entire lifecycle. ELO enables you to automate all of your corporate processes, ensure compliance, supply information across locations and provide for transparent business processes. The seamless integration of the Microsoft SharePoint Server 2013 with the scalable ELO ECM platform provides you with the full ECM and collaboration management power of both systems. By linking the SharePoint information portal with the ELO ECM platform, you can improve your data storage, optimize processes, increase transparency and thus generate real business advantages.



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Comprehensive information management

Solid information management achieves optimal economic results. Information is a crucial element in building customer relationships, creating innovation, and promoting teamwork. It is therefore all the more important that your IT investments in information management achieve the best possible results. Above all, business applications must be linked together seamlessly without this resulting in interface problems and media discontinuity.

The powerful information and document platform

Microsoft SharePoint 2013 is a sophisticated system platform to create business solutions, particularly in the areas of collaboration and teamwork management. This platform, however, is only one element of a complete system solution. It only becomes a complete solution for a comprehensive business process-oriented IT environment when it is combined with the ECM functions in ELO.

The ELO ECM system environment is seamlessly integrated into SharePoint through the use of Web Parts. The Web Parts ensure that users are able to access all ELO ECM functions through SharePoint, including managing workflows and the repository. The ELO repository acts as the central repository back end in which all corporate knowledge is consolidated. As a Web Part, ELO integrates easily via drag-and-drop into the familiar portal environment of SharePoint.



Each user may individually customize the Web Parts to see only the information relevant to that user. The following options are available:

- Access to and navigation through the repository structure
- Comprehensive and qualified document search
- Creating filtered lists of documents
- Listing all documents in use
- Monitoring ongoing workflow processes

Integration into heterogeneous IT landscapes

If SharePoint is already optimally integrated with other Microsoft products, ELO for SharePoint will provide a multitude of extensions to applications and functions. This includes interfaces to CAD or ERP systems, which is essential to effectively represent a process-oriented solution. ELO provides powerful interfaces to almost all important business applications, including SAP, BaaN, and Microsoft Dynamics. ELO for SharePoint provides a central and comprehensive business process platform.

DocLibrary filing

ELO for SharePoint is able to file all documents, easily and legally compliant, from the document libraries. The documents are filed from SharePoint based on rules for each document type, either manually or fully automated. The process takes document types and document versions into account, and depending on the configuration, is also able to remove documents from document libraries.

Transparency and control

There is no foreseeable end to legal regulation of business life in the near future. Indeed, it will only tend to increase with globalization. Despite the maze of regulations and legal clauses relating to information handling, data security and so on, they all boil down to transparency and control. Compliance requires secure and consistent information management, from its creation to processing, forwarding, analysis and storage, and finally to its potential deletion. For your company, the fulfillment of compliance requirements, entirely irrespective of legal constraints, make greater transparency and process reliability necessary in your business processes.

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Ensure compliance and increase process quality

The ELO ECM Suite provides all the functions required for legally compliant long-term filing. The right filing strategy takes the burden of long-term document storage off of SharePoint. Depending on the company requirements, ELO for SharePoint offers two filing options:

1. Direct filing

With direct filing, SharePoint writes directly to the ELO repository. Documents are stored exclusively in the ELO system with this method, rather than on the SQL server. Since both write and read operations are performed transparently from the SharePoint interface, the users are able to keep working as they are used to. The SharePoint SQL database remains small, ensuring better performance. This also achieves increased security, since the ELO repository system is also able to manage documents in special long-term storage.

2. Asynchronous filing

Asynchronous filing temporarily stores the documents in the SharePoint document libraries while they are being edited. After the editing process is complete, the documents can be imported to the central ELO repository based on rules. Afterwards, SharePoint provides transparent document access as usual.

ELO enables automatic conversion to long-term formats, as well as adding a digital bulk signature. ELO can also transfer entire folder and document libraries into the repository. During filing, metadata is imported as well, converting attributes in SharePoint into the format used by the repository. ELO for SharePoint provides you the greatest degree of legally compliant filing.



Global SharePoint search

The standard search in SharePoint is expanded to include the global search abilities of the ELO ECM system. This links the search results with the results list from SharePoint.

The ELO list entries are displayed as links, making them available to be retrieved directly. Integrating the repository as a content source into the SharePoint search is also a standard feature, just like the navigable repository structure display, as a Web Part.

Custom and targeted search

Custom settings can be saved for each user in the search, allowing relevant information to be filtered and displayed in a targeted way. Various search modes can be selected via the Web Part. This makes a targeted search within the ELO repository possible and opens up a wealth of additional information to each employee from the existing business process environment. Search by document type or form search requests from keywords in the full text database or a thesaurus.

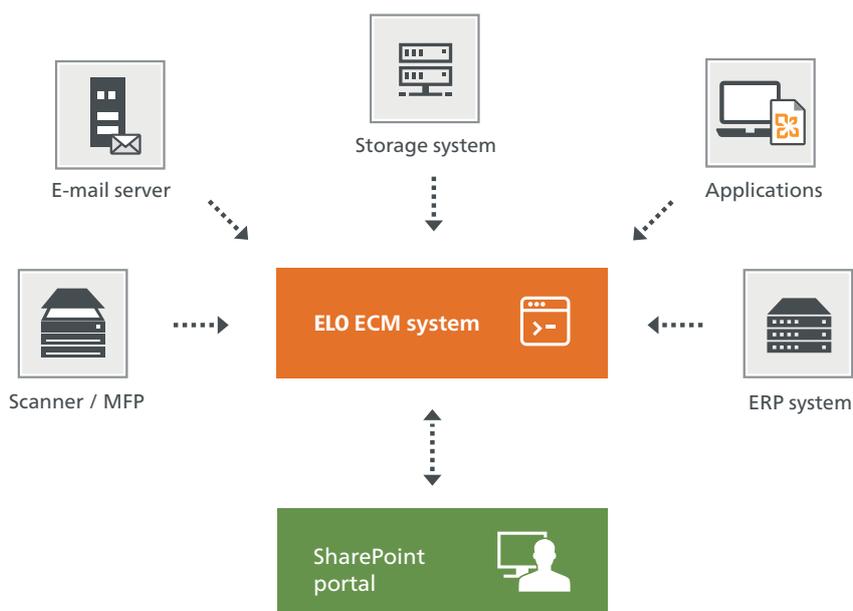


Figure: Information provision and data exchange between the ELO ECM system, SharePoint and other applications

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Integrated e-mail management: Reduce costs and save resources

The separation of Microsoft Exchange from SharePoint results in decentralized data storage. ELO for SharePoint enables the implementation of a global e-mail management strategy. This includes both server-based and client-based e-mail filing. Users are able to use SharePoint to access all of their e-mail messages in the ELO repository. ELO automatically links the contents of e-mails with their corresponding business processes.

This securely embeds e-mail management into the overall business process. Single instance filing in ELO also ensures that data is stored in a space-saving and efficient manner. Part of this means that attachments are only filed to the ELO repository once. Furthermore, the ELO repository functions ensure that e-mail messages are retained with legal compliance.

ELO workflow: represent complex processes and integrate them with SharePoint

The ELO ECM Suite also provides a high-performance workflow server that is integrated in the standard version. This complete workflow functionality allows specific enterprise processes to be used in SharePoint without extensive programming. A graphical designer interface allows complex business processes to be easily modeled and linked in productive operation with SharePoint. The ELO workflow functions display the current task list for a user and enable the workflows and reminders to be accepted, processed, and passed on. The document belonging to the workflow can be displayed and edited.

Graphic workflow monitoring also makes it possible to track each business process in detail. This guarantees transparency and control for your company.



Connectivity with mobile devices

Mobility plays an ever greater role in the ever faster-moving world of work. Therefore, ELO has provided users with the ability to access the repository via the Web Client or the "ELO for Mobile Devices" app (for Android and iOS), allowing them to take part in business processes on the go. These two mobile solutions allow ELO workflows to be initiated and processed. This also increases the relevance of the two mobile ECM access methods in connection with SharePoint. With close collaboration between SharePoint and the ELO ECM repository, these solutions are an important tool to successfully manage the interactions between ECM and SharePoint.

Advantages of ELO for SharePoint:

- Automatic, transparent content import and control
- Addition of legally compliant filing to SharePoint
- Filing with links in SharePoint for oversight and control
- ELO Backup protects critical information for business cooperation
- Retention and deletion automation in coordination with regulations and legal requirements
- Simultaneous use of collaboration and ECM functions
- Centralized data retention, work with ELO in the usual portal environment, ECM, filing and workflows
- Ability to index documents immediately while scanning
- Parallel access via portal and rich clients, replication between all locations, server-based e-mail filing, comprehensive integrated search

Increased process automation

ELO for SharePoint gives you the ability to automatically classify incoming mail. Hard copy documents are scanned directly in the mailroom and the electronic versions are directed to the corresponding department. This eliminates waiting times and enables immediate automated document processing. The ELO DocXtractor module makes automated document classification and data extraction possible. The data relevant to processing is extracted with an intelligent free-form recognition algorithm and automatically sent on to the next processing step.

SharePoint provides: Ad-hoc collaboration, web-based document storage and exchange, Office integration, live communication

The ELO ECM platform additionally provides: Legally compliant, rule-based, centralized filing, content outsourced and managed to various storage units, replication of repositories/partial repositories, mobile/offline client, a flexible representation of filing and organizational structures, workflows, scanning and classification, integration into heterogeneous IT landscapes, central business repository, integrated signatures

SharePoint and ELO provide: Ad-hoc communication, availability of all documents and information on all applications, platform independence, comprehensive ECM solution for your company

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