

From Reactive to Proactive

Microsoft SharePoint based Document Management

Going from reactive to proactive by changing DMS

Staffan Hugemark

Contentworker
by Formpipe



Formpipe.



Formpipe.

Largest European ECM Vendor



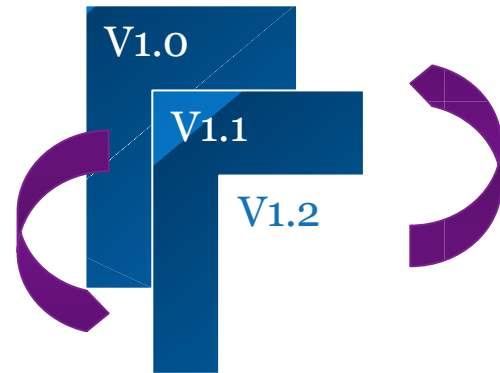
**+150.000 users in
+500 law firms /
corp legal**

**250 employees in
8 countries**

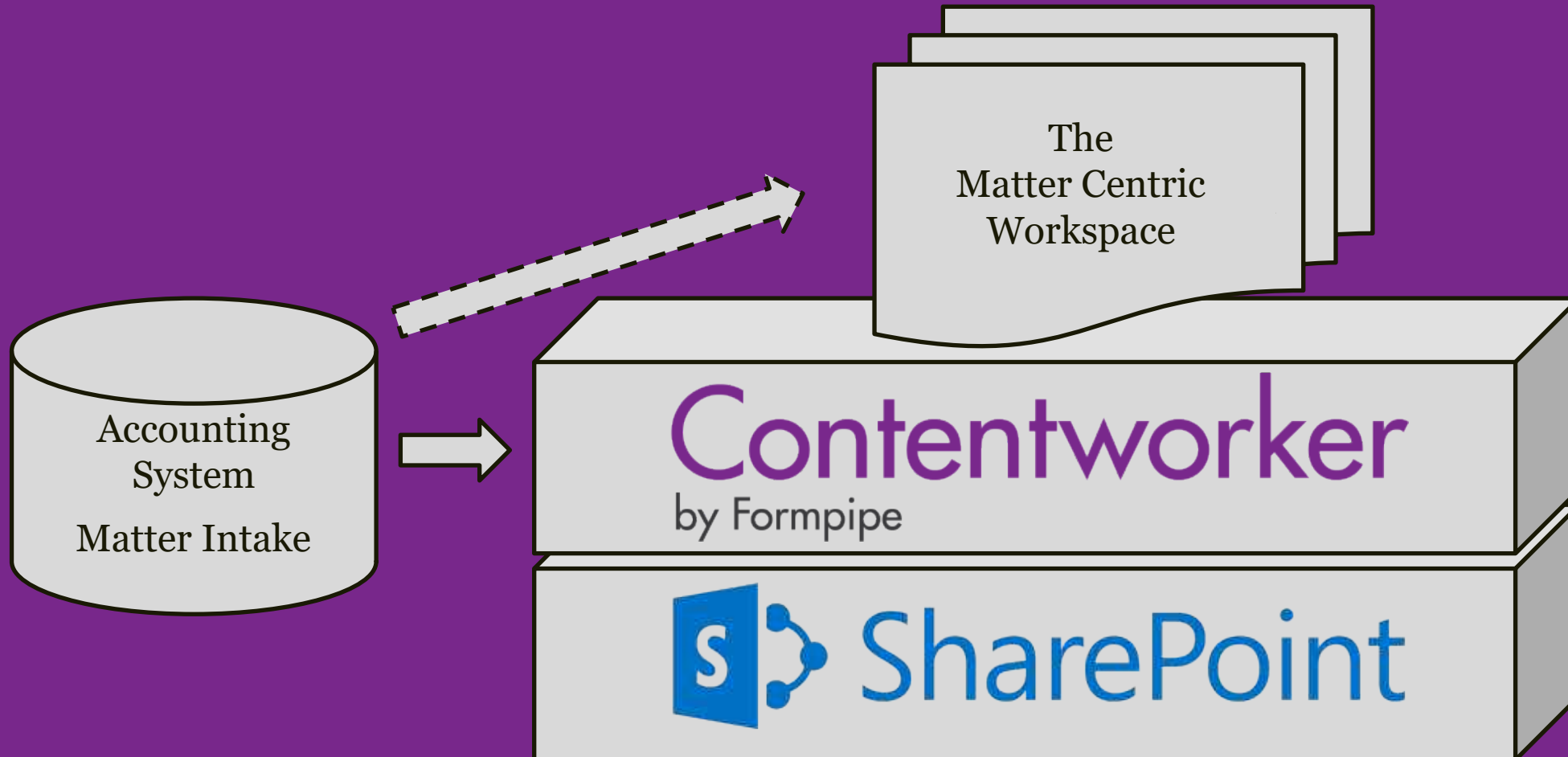


**€ 40 M
turnover**

SharePoint



0.41	2017-05-18 09:38	<input type="checkbox"/> Mikhail Pyramsky	477.4 KB
0.40	2017-05-17 11:06	<input checked="" type="checkbox"/> Staffan Hugemark	485.5 KB
0.39	2017-05-11 23:29	<input checked="" type="checkbox"/> Staffan Hugemark	484.3 KB
0.38	2017-05-08 11:31	<input type="checkbox"/> Mikhail Pyramsky	474.2 KB
0.37	2017-05-04 15:14	<input type="checkbox"/> Mikhail Pyramsky	473.1 KB
0.36	2017-05-03 17:17	<input type="checkbox"/> Mikhail Pyramsky	472.2 KB
0.35	2017-05-03 12:01	<input type="checkbox"/> Mikhail Pyramsky	471.4 KB
0.34	2017-04-28 07:45	<input checked="" type="checkbox"/> Artem Demianenko	470.8 KB
0.33	2017-04-24 15:04	<input type="checkbox"/> Mikhail Pyramsky	467.8 KB
0.32	2017-04-20 16:29	<input type="checkbox"/> ContentWorker Site Admin	466.3 KB
0.31	2017-04-18 16:00	<input checked="" type="checkbox"/> Artem Demianenko	462.4 KB
0.30	2017-04-12 08:38	<input type="checkbox"/> ContentWorker Site Admin	460.8 KB
0.29	2017-04-10 16:58	<input type="checkbox"/> ContentWorker Site Admin	459.1 KB
0.28	2017-04-10 09:55	<input type="checkbox"/> ContentWorker Site Admin	478.4 KB
0.27	2017-04-05 14:16	<input checked="" type="checkbox"/> Artem Demianenko	478.9 KB
0.26	2017-04-05 13:17	<input type="checkbox"/> ContentWorker Site Admin	478.6 KB
0.25	2017-04-03 14:48	<input type="checkbox"/> Mikhail Pyramsky	471.5 KB
0.24	2017-04-03 14:36	<input checked="" type="checkbox"/> Artem Demianenko	477.0 KB
0.23	2017-04-03 13:14	<input type="checkbox"/> Mikhail Pyramsky	472.7 KB
0.22	2017-04-03 11:44	<input checked="" type="checkbox"/> Artem Demianenko	481.1 KB











**MACHINE
LEARNING**



Contentworker
by Formpipe



The "Inbox Manager"

Inbox (996)



Drafts

996 unread emails

”One look at an email can rob
you of 15 minutes of focus.

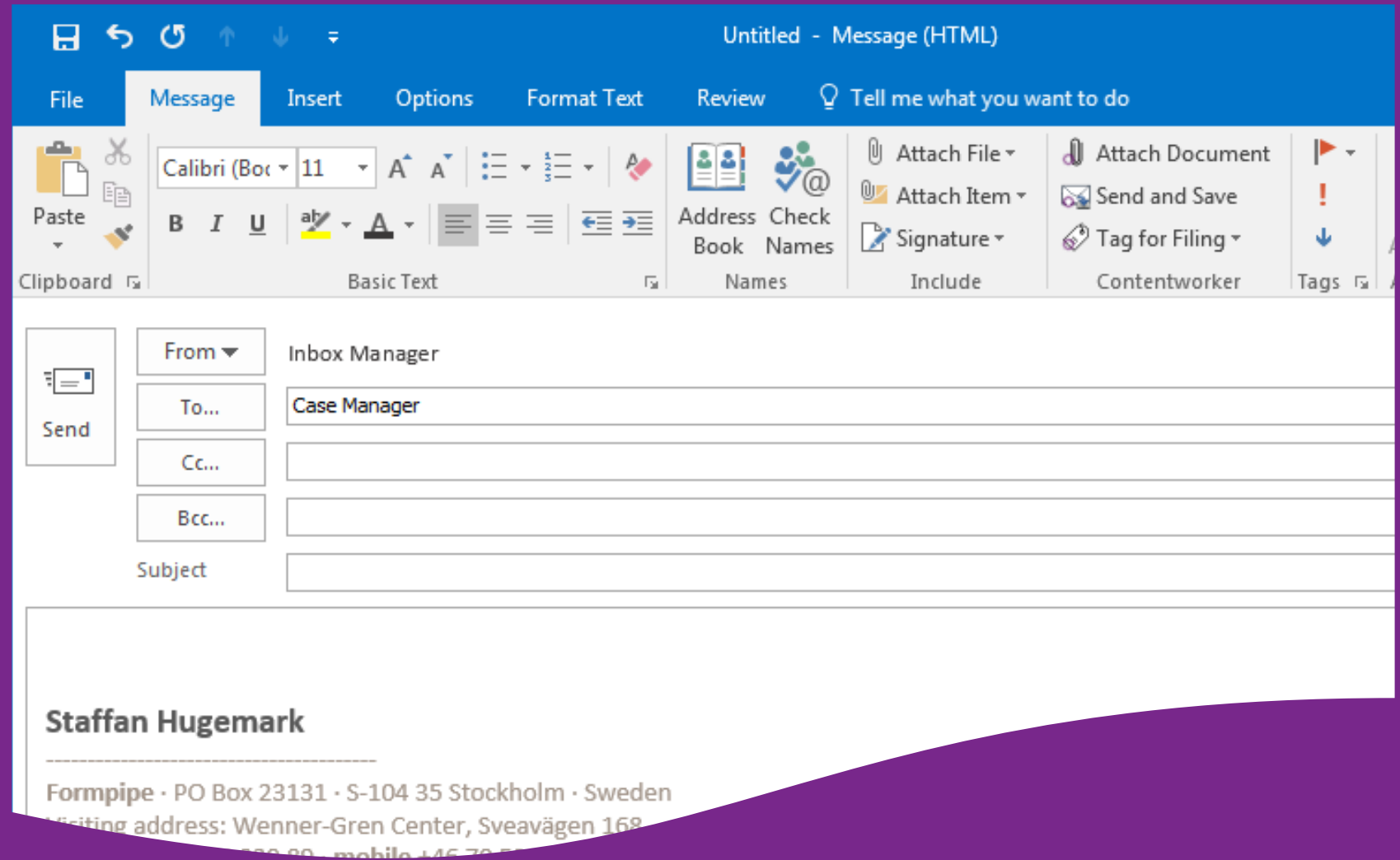
Jacqueline Leo
(Editor in Chief of The Fiscal Times)

”You can always find a distraction
if you are looking for one.”

Tom Kite
(Professional Golfer)



From Inbox Manager To Case Manager



Untitled - Message (HTML)

File Message Insert Options Format Text Review Tell me what you want to do

Paste

Clipboard

Calibri (Box) 11 A A

B I U

Basic Text

Address Book Check Names

Attach File Attach Document

Attach Item Send and Save

Signature Tag for Filing

Contentworker Tags

Send

From Inbox Manager

To... Case Manager

Cc...

Bcc...

Subject

Staffan Hugemark

Formpipe • PO Box 23131 • S-104 35 Stockholm • Sweden

Visiting address: Wenner-Gren Center, Sveavägen 168

020 89 146 79 51

”We love the peace and quite that it’s creating to work out of workspaces, instead of constantly looking at your inbox.”

Kneppelhout & Korthals
(Dutch Law firm)







▸ Matter Summary

Search all matters ▾ 🔍

Contentworker

AJAX NV
Client Overview Matt...BARLEY
Aquire HAPPY HOPSFORMPIPE
Client Overview Matt...INSURANCE CORP INC
Merger with Professi...

Go to matter...

Insurance Corp Inc (100016) / Merger with Professional Insurance Ltd (0002)

Menu Tree View

- ⚙ Saved Searches
- 🕒 My Recent Matters
 - 📁 BARLEY (100005)
 - 📁 Formpipe (INTERNAL)
 - 📁 Insurance Corp Inc (100016)
 - 📁 Merger with Professional Insurance
 - 📁 Agreement [28]
 - 📁 Correspondence [10]
 - 📁 DD [5]
 - 📁 E-mail [24]
 - 📁 Formality [2]
 - 📁 Meeting [1]
 - 📁 Memo [4]
 - 📁 Presentation [2]
 - 📁 Contracts that need to be reviewed
 - 📁 Matter Summary [9]
 - 📁 Externally Shared [3]
 - 📁 Calendar [5]

☐ Hide empty Document Types

Start Documents Details Externally Shared Contacts Calendar Tasks Notes Discussions

Recycle bin 🗑️ ☆ ✓

MATTER DOCUMENTS

Documents and e-mails Only documents Only e-mails

📄	Name	Doc ID	Version	Document Type	Modified↓	Last Modified By
✉	Payment confirmed (609726164).msg NEW	870	0.1	E-mail	4 hours ago	David Little
✉	Outstanding amounts (1894874520).msg NEW	869	0.1	E-mail	4 hours ago	David Little
📄	Agreement to buy a boat.docx	765	0.2	Agreement	4 days ago	Jonas Abrahamsson
📄	Demo nr 2.docx	862	0.1	Correspondence	4 days ago	Staffan Hugemark
📄	Contentworker Mobile Server Requirements.pdf	861	0.1	Agreement	4 days ago	Staffan Hugemark
📄	NDA for Professional Insurance - Draft.docx	852	0.4	Agreement	4 days ago	Staffan Hugemark
📄	Letter to John Doe.docx	858	1.0	Correspondence	5 days ago	Staffan Hugemark
📄	Letter Mrs D.docx	846	0.5	Correspondence	5 days ago	Staffan Hugemark
📄	Agreement to purchase licensing rights.docx	762	0.2	Agreement	6 days ago	SHAREPOINT\system
📄	agreement to buy a plane.docx	826	0.7	Agreement	September 8	Staffan Hugemark
📄	Letter to Mr X.docx	833	0.1	Correspondence	August 25	Staffan Hugemark
✉	RE DRAFT Key Criteria for a Successful SharePoint DMS Implementation	831	0.1	E-mail	August 24	Staffan Hugemark

MATTER SUMMARY

Owner: Staffan Hugemark

Insurance Corp to acquire Professional Insurance

Summary

Type↑	Last Update	Items
📅 Calendar	10/5/2017 3:40:48 PM	5
💬 Discussions	6/15/2017 2:50:36 PM	2
📁 Documents	10/9/2017 4:17:10 PM	76
📄 Notes	10/5/2017 3:41:33 PM	4
📅 Tasks	10/5/2017 3:41:40 PM	2
👤 Contacts	4/10/2017 7:32:38 AM	0

StartDocumentsDetailsExternally SharedContactsCalendarTasksNotesDiscussions

Saved Searches

My Recent Matters

BARLEY (100005)

Formpipe (INTERNAL)

Insurance Corp Inc (100016)

Merger with Professional Insurance

Agreement [28]

Correspondence [10]

DD [5]

E-mail [24]

Formality [2]

Meeting [1]

Memo [4]

Presentation [2]

Contracts that need to be reviewed

Matter Summary [9]

Externally Shared [3]

Calendar [5]

BARLEY

Require HAPPY HOPS

FORMPIPE

Client Overview Matt...

INSURANCE CORP INC

Merger with Professional Insurance

6164).msg	NEW	870	0.1	E-mail	4 hours ago	David Little
4874520).msg	NEW	869	0.1	E-mail	4 hours ago	David Little
ocx		765	0.2	Agreement	4 days ago	Jonas Abrahamsson
		862	0.1	Correspondence	4 days ago	Staffan Hugemark
er Requirements.pdf		861	0.1	Agreement	4 days ago	Staffan Hugemark
ance - Draft.docx		852	0.4	Agreement	4 days ago	Staffan Hugemark
		858	1.0	Correspondence	5 days ago	Staffan Hugemark
		846	0.5	Correspondence	5 days ago	Staffan Hugemark
ensing rights.docx		762	0.2	Agreement	6 days ago	SHAREPOINT\system
docx		826	0.7	Agreement	September 8	Staffan Hugemark
		833	0.1	Correspondence	August 25	Staffan Hugemark
Successful		831	0.1	E-mail	August 24	Staffan Hugemark
tation						

Hide empty Document Types

SharePoint DMS Implementation

Save Document(s) to Contentworker

Search matter... Find a document...

My Recent Matters

- BARLEY (100005)
- Fompipe (INTERNAL)
- Insurance Corp Inc (100016)
 - Merger with Professional Insurance Ltd (100017)
 - Agreement
 - Drafts
 - Final Agreement
 - Correspondence
 - DD
 - E-mail
 - Formality
 - Meeting
 - Memo
 - Presentation
- Wile E. Coyote (000100)

My Favourite Matters

- Matters that I am responsible of
- Matters that I own

Name	Document Id	Version	Modified	Modified By
AGREEMENT between both parties.d...	876	0.1	10/10/2017 3:27 PM	David
Agreement to shopping mall.docx	874	0.1	10/10/2017 3:25 PM	SHAR
Agreement to buy a boat.docx	765	0.2	10/5/2017 5:38 PM	Jonas
NDA for Professional Insurance - Draft....	852	0.4	10/5/2017 2:09 PM	Staffar
Agreement to purchase licensing rights...	762	0.2	10/3/2017 5:20 PM	SHAR
agreement to buy a plane.docx	826	0.7	9/8/2017 11:40 AM	Staffar
Agreement for trade mark.docx	766	1.3	8/24/2017 10:05 AM	Staffar
Agreement to merge company x and y....	758	0.5	8/21/2017 2:45 PM	Fredrik
a new agreement for today3.docx	767	0.2	6/27/2017 6:40 PM	David
Contract to buy medical equipment.docx	764	0.1	6/27/2017 2:51 PM	David
Agreement to buy a parking lot.docx	759	0.2	6/26/2017 3:56 PM	SHAR
Agreement for Employee Compensatio...	754	0.2	6/23/2017 7:42 PM	SHAR
Contract to buy a new building.docx	753	0.1	6/23/2017 5:15 PM	David
new doc for today.docx	721	0.2	6/23/2017 5:06 PM	David
Agreement regarding employees.docx	752	0.4	6/22/2017 9:00 PM	David

> Virtual Folders

- Contracts that need to be reviewed
- Matter Summary

Document name: SSG Mutual NDA 20170101_UK.docx

Save as type: Word Document (*.docx)

☐ Add as new version to existing document

Settings Save Cancel

Licensed to Intelligo, 100 users



Search

Contentwork

AJAX NV
Client Overview Matt...BARLEY
Aquire HAPPY HOPSFORMPIPE
Client Overview Matt...INSURANCE CORP INC
Merger with Professi...

Go to matter...

Menu Tree View

- Saved Searches
- My Recent Matters
- My Favourite Matters
- Matters I am responsible for
- Matters I own

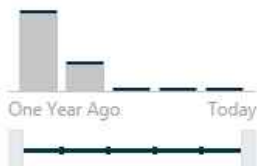
Result type

Email (1)

PDF (2)

Word (1)

Modified date



All

Author

Staffan Hugemark (3)

Jonas Abrahamsson (2)

jonas (1)

SHOW MORE

Client

Wile E. Coyote (2)

Insurance Corp Inc (1)

Zoobrocket (1)

Matter

Wile E Coyote vs Acme Inc.

Power of attorney

Preference for results in Swedish

Relevance

Power of Attorney

Video provides a powerful way to help you prove your point ... When you click Online Video, you can paste in the ... You can collapse parts of the document and focus on the text you want ...

Wile E. Coyote (000100) - Wile E Coyote vs Acme Inc. (0001) / Formality, Document ID: 184, Last modified: 4/20/2017

test (1845596605)

FormalitiesOfficial documents and **Power of attorney** Invoice ... (Note that users can add the ... X X Judgement X X **Power of Attorney** X X X Settlement X X ...

Wile E. Coyote (000100) - Wile E Coyote vs Acme Inc. (0001) / Correspondence, Document ID: 213, Last modified: 1/21/2015

Mutual NDA

Each of the parties agrees with respect to the Confidential Information of the other party: a. To hold Confidential Information of the Disclosing Party in strict confidence ...

Insurance Corp Inc (100016) - Merger with Professional Insurance Ltd (0002) / Agreement, Document ID: 153, Last modified: 4/28/2015

insider284

Jon Summers of Stickleback Technologies points out that OpenText recently issued details of continued support for both v.7 and v.9 of BPS ...

Zoobrocket (100003) - Acquisition of Idun Tools (0001) / Formality, Document ID: 67, Last modified: 7/2/2015

Power of Attorney

Microsoft Word

Power of Attorney

Video provides a powerful way to help you prove your point. When you click Online Video, you can paste in the embed code for the video you want to add. You can also type a keyword to search online for the video that best fits your document. To make your document look professionally produced, Word provides header, footer, cover page, and text box designs that complement each other. For example, you can add a matching cover page, header, and sidebar.

Click Insert and then choose the elements you want from the different galleries. Themes and styles also help keep your document coordinated. When you click Design and choose a new Theme, the pictures, charts, and SmartArt graphics change to match your new theme. When you apply styles, your headings change to match the new theme. Save time in Word with new buttons that show up where you need them.

To change the way a picture fits in your document, click it and a button for layout options appears next to it. When you work on a table, click where you want to add a row or a column, and then click the plus sign. Reading is easier, too, in the new Reading view. You can collapse parts of the document and focus on the text you want. If you need to stop reading before you reach the end, Word remembers where you left off - even on another device.

Video provides a powerful way to help you prove your point. When you click Online Video, you can paste in the embed code for the video you want to add. You can also type a keyword to search online for the video that best fits your document.

Changed by Staffan Hugemark on 4/20/2017 12:22 PM

EDIT VIEW LIBRARY VIEW PROPERTIES OPEN IN VIZIT ESSENTIAL



Search

Contentwork

AJAX NV
Client Overview Matt...BARLEY
Aquire HAPPY HOPSFORMPIPE
Client Overview Matt...INSURANCE CORP INC
Merger with Professi...

Go to matter...

Menu Tree View

- Saved Searches
- My Recent Matters
- My Favourite Matters
- Matters I am responsible for
- Matters I own

Result type

Email (1)

PDF (2)

Word (1)

Power of attorney

is in Swedish

Counterparties

Acme Inc (56)

Professional Insurance (45)

Idun Tools (30)

NANGILIMA BREWERY (14)

help you prove your point ... When you click
... You can collapse parts of the document and

Covote vs Acme Inc. (0001) / Formality, Document

Power of attorney Invoice ... (Note that users
Power of Attorney X X X Settlement X X ...
Covote vs Acme Inc. (0001) / Correspondence,
7/21/2015Subject to the Confidential Information of the
Information of the Disclosing Party in strictMerger with Professional Insurance Ltd (0002) /
Last modified: 4/28/2015Jon Summers of Stickleback Technologies points out that OpenText recently
issued details of continued support for both v.7 and v.9 of BPS ...Zoo bracket (100003) - Acquisition of Idun Tools (0001) / Formality, Document ID:
67, Last modified: 7/2/2015

Matter

Wile E Covote vs Acme Inc.

Power of Attorney

Microsoft Word

Power of Attorney

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Click Insert and then choose the elements you want from the different galleries. Themes and styles also help keep your document coordinated. When you click Design and choose a new Theme, the pictures, charts, and SmartArt graphics change to match your new theme. When you apply styles, your headings change to match the new theme. Save time in Word with new buttons that show up where you need them.

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Changed by Staffan Hugemark on 4/20/2017 12:22 PM

EDIT VIEW LIBRARY VIEW PROPERTIES OPEN IN VIZIT ESSENTIAL

Insurance Corp Inc-Merger with Professional Insurance Ltd [100016-0002]@ - shu@traen.se - Outlook

File Home Send / Receive Folder View Add-ins Tell me what you want to do

New Email New Items Meet Now Schedule Meeting Ignore Clean Up Junk Delete Archive Reply Reply All Forward Meeting IM More Move Rules OneNote Unread/Read Categorize Follow Up Search People Address Book Filter Email Filing Assistant Settings Contentworker

Contentworker Outlook Filing

Search matter... Save Create Folder

Favorites

- Inbox 3864 - shu@traen.se
- Inbox 22 - Staffan.Hugemark@formpipe.com
- Logins
- Sent Items
- Drafts [449]
- Inbox (Demo) 6
- Clutter 96

Monitored Folders

- Ajax NV-Client Overview Matter [1025-overview]@
- BARLEY-Aquire HAPPY HOPS [100005-20140045]@ 2
- DAHL International-Distribution contract [100004-0001]@ 1
- Formpipe-Client Overview Matter [INTERNAL-overview]@
- Insurance Corp Inc-Merger with Professional Insurance...**

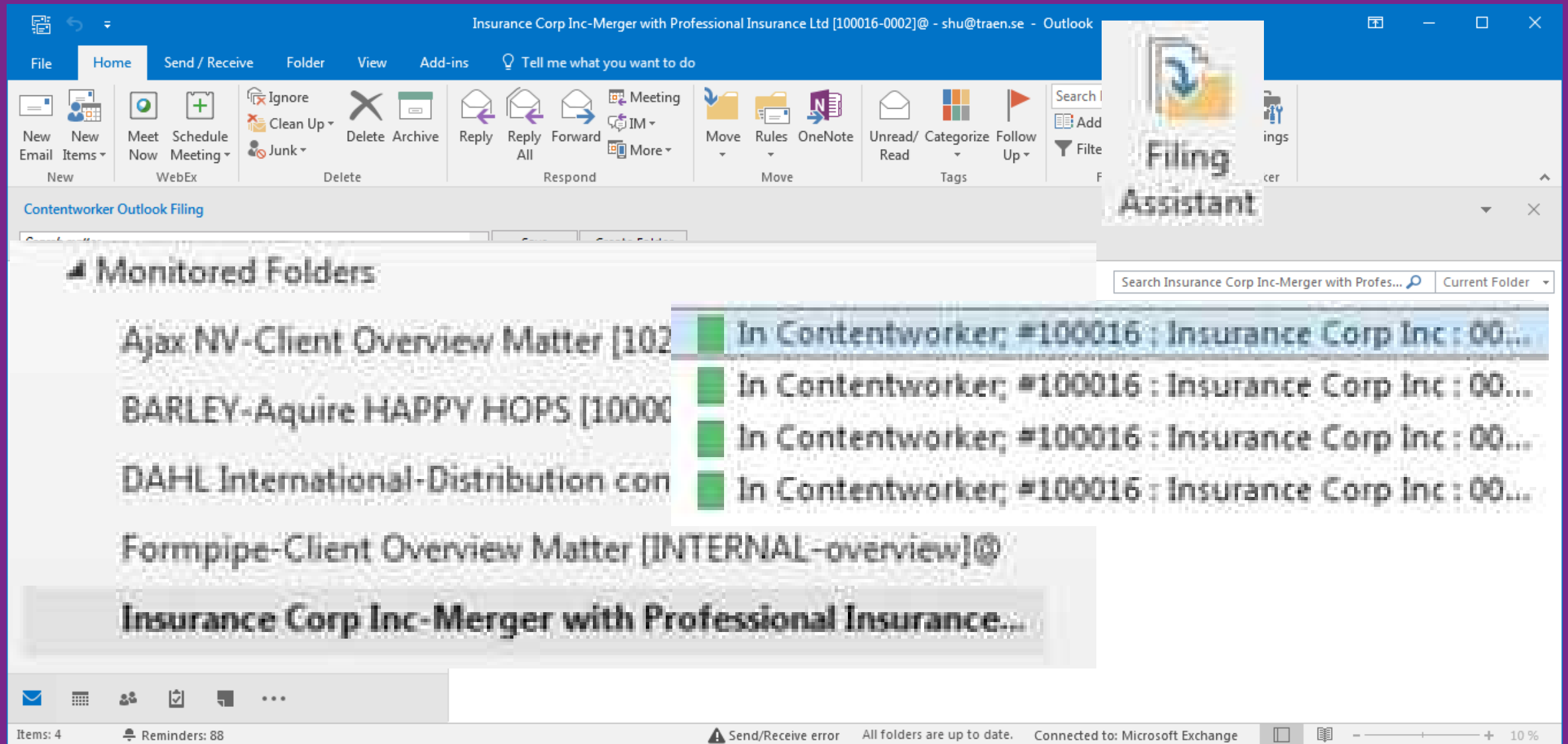
All Unread Mentions

Search Insurance Corp Inc-Merger with Profes... Current Folder

FROM	SUBJECT	SENT	RECEIVED	CATEGORIES
Date: Older				
David Little	RE: DRAFT: Key Criteria for a Succe...	må 2017-05-15 21:06	må 2017-05-15 21:06	In Contentworker; #100016 : Insurance Corp Inc : 00...
Jager, Scott	Re: DRAFT: Key Criteria for a Succe...	må 2017-05-15 19:10	må 2017-05-15 19:13	In Contentworker; #100016 : Insurance Corp Inc : 00...
Gail Persichilli	RE: DRAFT: Key Criteria for a Succe...	må 2017-05-15 16:56	må 2017-05-15 16:56	In Contentworker; #100016 : Insurance Corp Inc : 00...
Sally Vernon	*** LEXPO INFORMATION ***	to 2017-05-04 14:49	to 2017-05-04 14:49	In Contentworker; #100016 : Insurance Corp Inc : 00...

Items: 4 Reminders: 88

Send/Receive error All folders are up to date. Connected to: Microsoft Exchange 10 %



Insurance Corp Inc-Merger with Professional Insurance Ltd [100016-0002]@ - shu@traen.se - Outlook

File Home Send / Receive Folder View Add-ins Tell me what you want to do

New Email New Items Meet Now Schedule Meeting Ignore Clean Up Junk Delete Archive Reply Reply All Forward Meeting IM More Move Rules OneNote Unread/Read Categorize Follow Up Search Add Filter

Contentworker Outlook Filing

Monitored Folders

- Ajax NV-Client Overview Matter [102
- BARLEY-Aquire HAPPY HOPS [10000
- DAHL International-Distribution con
- Formpipe-Client Overview Matter [INTERNAL-overview]@
- Insurance Corp Inc-Merger with Professional Insurance...

In Contentworker; #100016 ; Insurance Corp Inc : 00...

In Contentworker; #100016 ; Insurance Corp Inc : 00...

In Contentworker; #100016 ; Insurance Corp Inc : 00...

In Contentworker; #100016 ; Insurance Corp Inc : 00...

Search Insurance Corp Inc-Merger with Profes... Current Folder

Items: 4 Reminders: 88 Send/Receive error All folders are up to date. Connected to: Microsoft Exchange 10 %

Financial Info 2011 and 2012 [100005-20140045] - Message (HTML)

File Message Insert Options Format Text Review Tell me what you want to do

Cut Copy Paste Format Painter Clipboard

Calibri 10 A^A B I U Address Book Check Names Attach File Attach Item Signature Attach Document Send Tag for Filing Follow Up High Importance Low Importance

To... John.Doe@HappyHops.com

Cc...

Subject Financial Info 2011 and 2012 [100005-20140045]

Dear John,

Please send over the financial information we discussed this morning by close of business today.

- P&L reports for FY 2011 and 2012
- Balance sheets for FY 2011 and 2012

Best regards
David Cheetum

D,C & G LLP
Notice: This electronic message contains information from D,C & H LLP which may be privileged or confidential. The information is intended to be received by the intended recipient. If you are not the intended recipient, please do not disseminate, distribute or copy this e-mail. Please notify the sender immediately if you have received this e-mail by mistake. Failure to act promptly may be deemed negligent as it could result in disclosure of confidential information. (If you are not the intended recipient, please do not disseminate, distribute or copy this e-mail. Please notify the sender immediately if you have received this e-mail by mistake. Failure to act promptly may be deemed negligent as it could result in disclosure of confidential information.)

My Recent Matters

- Insurance Corp Inc (100016) - Merger with Professional Insurance Ltd (0002)
- DAHL International (100004) - Distribution contract (0001)
- Ajax NV (1025) - Client Overview Matter (overview)
- BARLEY (100005) - Acquire HAPPY HOPS (20140045)**
- Wile E. Coyote (000100) - Wile E Coyote vs Acme Inc. (0001)
- Formpipe (INTERNAL) - Client Overview Matter (overview)
- Formpipe (INTERNAL) - ILTACON 2017 (0004)

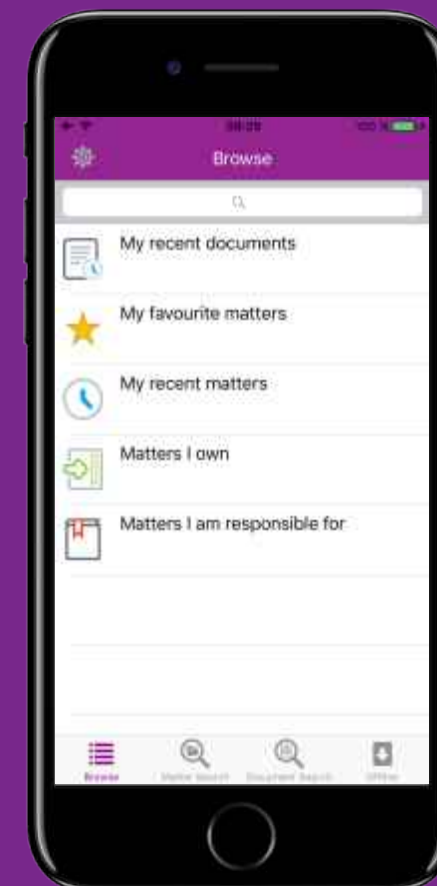
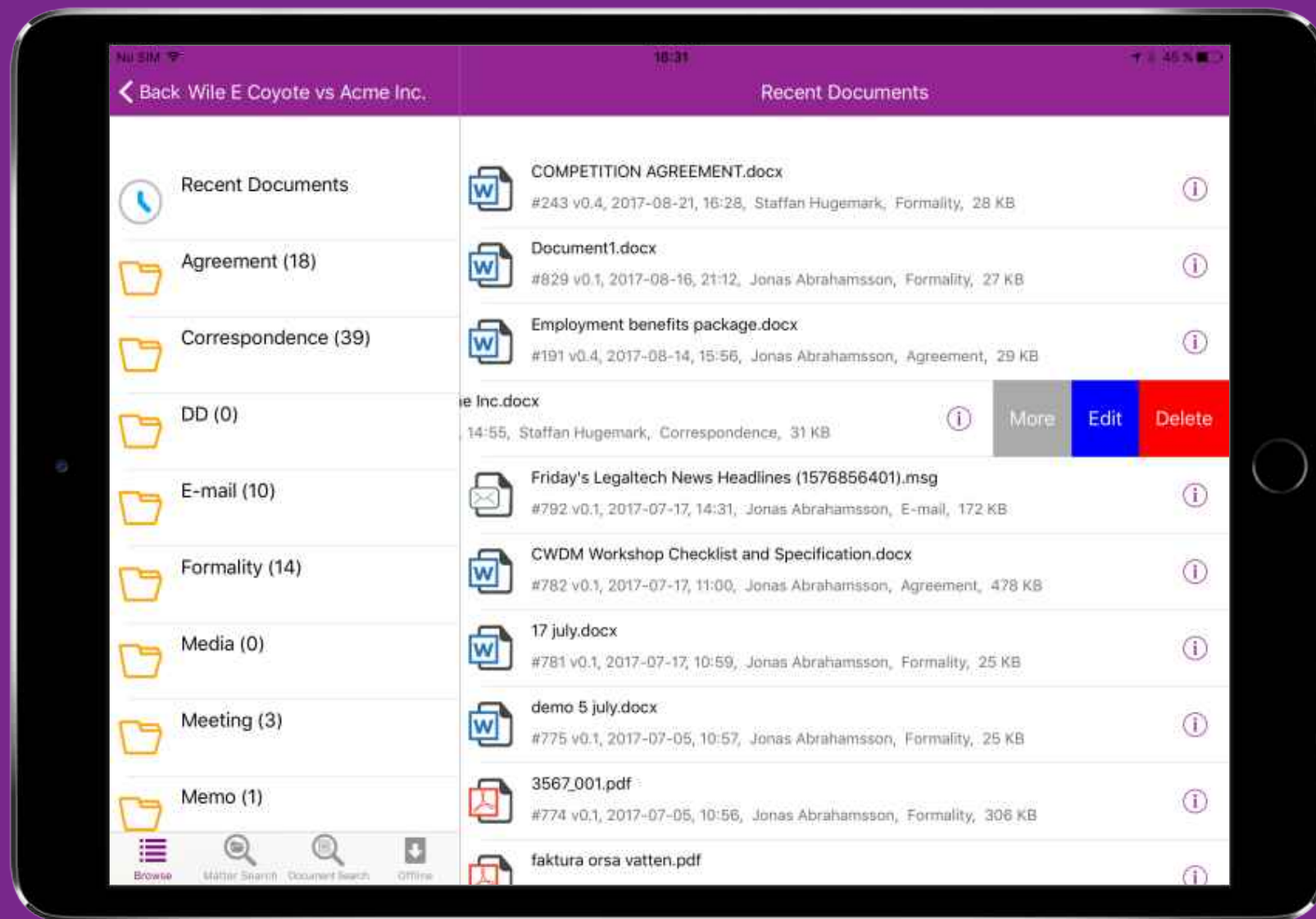
My Favourite Matters

- Insurance Corp Inc (100016) - Merger with Professional Insurance Ltd (0002)
- BARLEY (100005) - Acquire HAPPY HOPS (20140045)
- Zoobrocket (100003) - Acquisition of Idun Tools (0001)
- Formpipe (INTERNAL) - Lexpo 2017 (0002)
- Formpipe (INTERNAL) - Client Overview Matter (overview)
- Ajax NV (1025) - Client Overview Matter (overview)

More








- Search Matter...
- Refresh Matters





Contentworker















by Formpipe

Start Documents Details Externally Shared Contacts Calendar						
Find an item 						
<input type="checkbox"/>		Name	Doc ID	Version	Checked Out	Checked Out By
<input type="checkbox"/>		Internal memo April 19, 2017.pdf	147	0.2	About an hour ago	About an hour ago Henrik Svensson
<input type="checkbox"/>		Draft SPA Agreement.docx	152	0.2	Yesterday at 11:26 PM	About an hour ago Staffan Hugemark
<input type="checkbox"/>		SPA Appendix A.docx	154	0.2	5 days ago	Yesterday at 11:27 PM Sergey Borysenko
<input type="checkbox"/>		Quality Bonds Document.docx	639	0.5	About an hour ago	About an hour ago Henrik Svensson
<input type="checkbox"/>		SPA Appendix B.docx	155	0.2	5 days ago	5 days ago CW Admin



 Office 365



Documents		
	New	 Upload  Sync  Share More 
<input checked="" type="checkbox"/>	 Name	Modified
	 Internal memo April 19, 2017 	... About an hour ago
	 Quality Bonds Document 	... About an hour ago
	 Draft SPA Agreement 	... About an hour ago
	 SPA Appendix A	... Yesterday at 4:27 PM
	 SPA Appendix B	... 5 days ago



SharePoint

Office 365



- True Matter Centric:
 - In the browser
 - In Office and Outlook
 - On Mobile Device
- Everything Matter Related in One Place
- Office Speaks SharePoint – No lost edits!
- Evolve With Microsoft
- Benefit from a vast Ecosystem
- Low Cost of Ownership

Questions?

Thank You!