



presents

Planning for Mobile SharePoint Success

A Deep Dive into Real Business Scenarios

sponsored by



Planning for Mobile SharePoint Success

A Deep Dive into Real Business Scenarios



Dan Holme
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CANVIZ



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Product Manager
Colligo



Going Mobile



FRUSTRATING

35%

UNDER THREAT

20%

2015 AIIM SharePoint Industry Watch Report

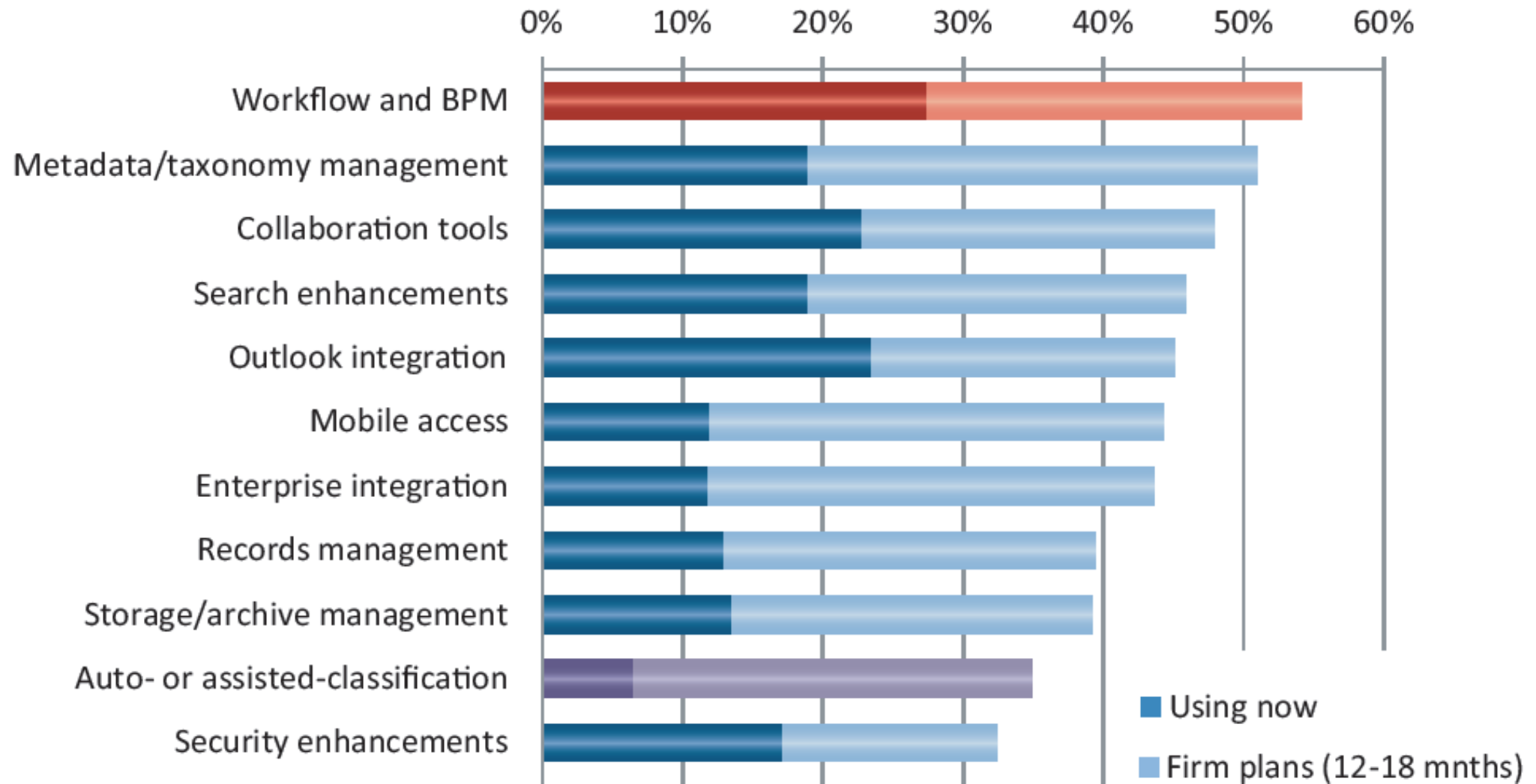


VPN

64%

Third-party
11.9% + 32.1%

Figure 17: Which of the following third party enhancement products for SharePoint have you implemented/plan to implement? (N=256)



Agenda

Explore four real mobile business scenarios



Information workers



Field sales executives



Field technicians



Professional services

Agenda

Explore four real mobile business scenarios

Mobile requirements checklist

Shortcut to evaluating and prioritizing your needs

Mobile success matrix

Configure, build, buy

Discussion, debate, and direction

Live Q&A

Mobile Requirements Checklist

- Mobility**
 - When needed
 - Across devices
 - Where needed
 - Low speed/latency
 - Offline
 - Secure
- User Experience**
 - Easy: "discoverable"
 - Integrated: "native"
- Content Requirements**
 - Documents
 - Contacts
 - Calendars
 - Tasks
 - Lists
 - Forms
 - Media
 - Business data
 - Business intelligence
 - Conversations
- Enterprise Content**
 - Information architecture
 - Findability
- Adoption & Usage**
 - Measurable
- Governance**
 - Access control
 - Rights management
 - Records management
 - Auditing
 - Reporting
 - E-Discovery
 - Supportability



Mobile Business Scenarios



Information workers



Field sales executives

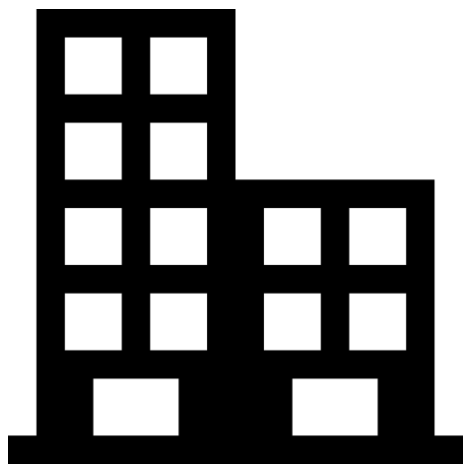


Field technicians



Professional services

Work



Home



Anywhere



Scenario 1: Information Workers





Information Workers

Enterprise platform

User adoption

Available anywhere

Multiple devices

User experience

Offline access

Information governance (security)



Information Workers

- Enterprise platform
- User adoption
- Available anywhere
- Multiple devices
- User experience
- Offline access
- Information governance (security)

SharePoint & Office 365

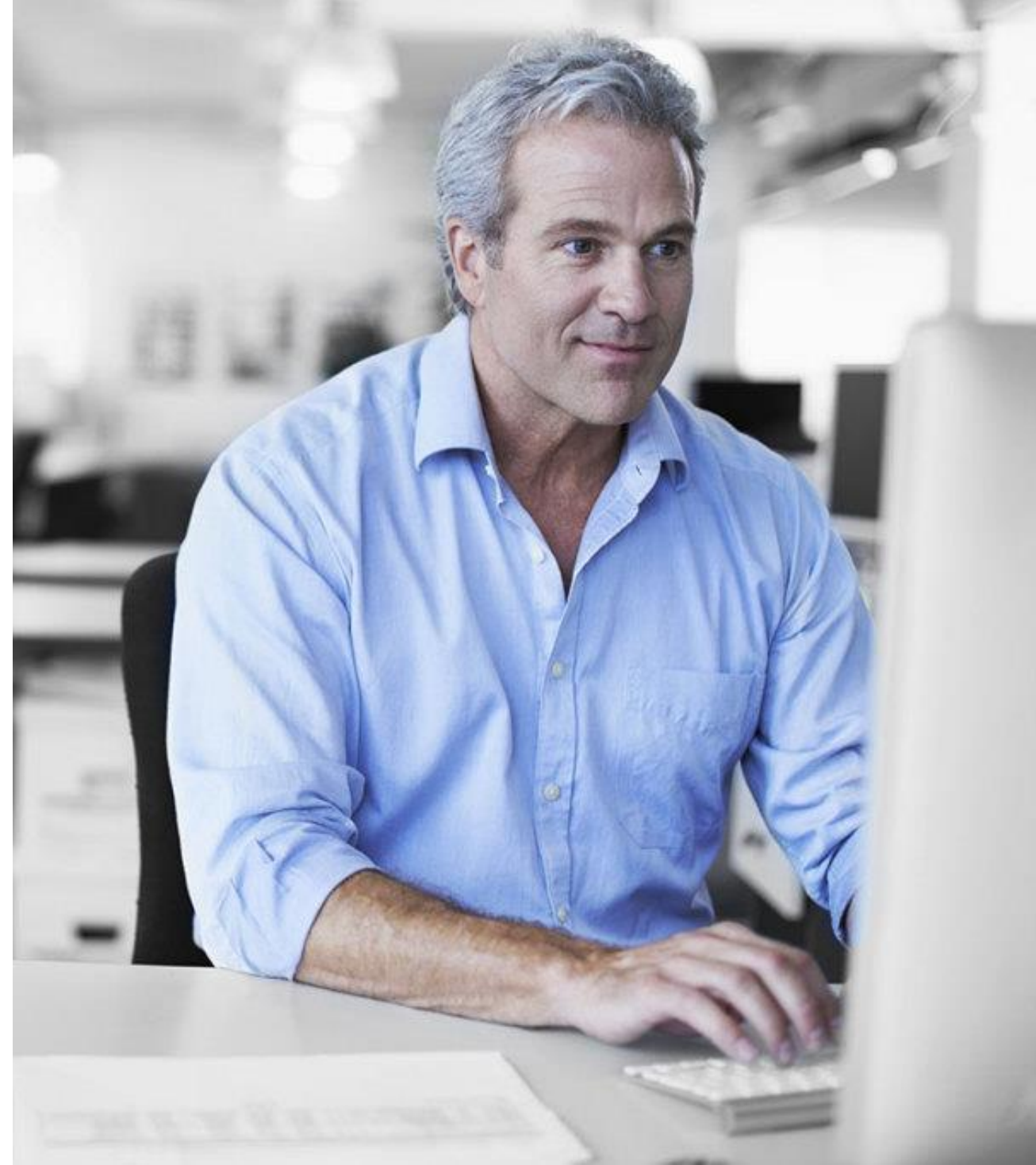
- OneDrive for Business
- SharePoint sites
- Office 365 Groups

KWELA

LEADERSHIP & TALENT MANAGEMENT

“Colligo has given us a 30-40% boost in productivity. We couldn’t go back to the old way, it would be far too painful.”

Russel Horwitz, Principal



Scenario 2: Field Sales Executives





Field Sales Executives

Contacts: Customers

Business intelligence: Customer

Content: Sales collateral

Data: Inventory and pricing

Forms: Orders

Offline access



Field Sales Executives

Contacts: Customers

Business intelligence: Customer

Content: Sales collateral

Data: Inventory and pricing

Forms: Orders

Offline access

SharePoint & Office 365

Contacts: Office 365

BI: Excel web application

Content: OneDrive for Business

Share: Office Mobile & Web Apps

Data: SharePoint lists

Forms: SharePoint lists, Office docs



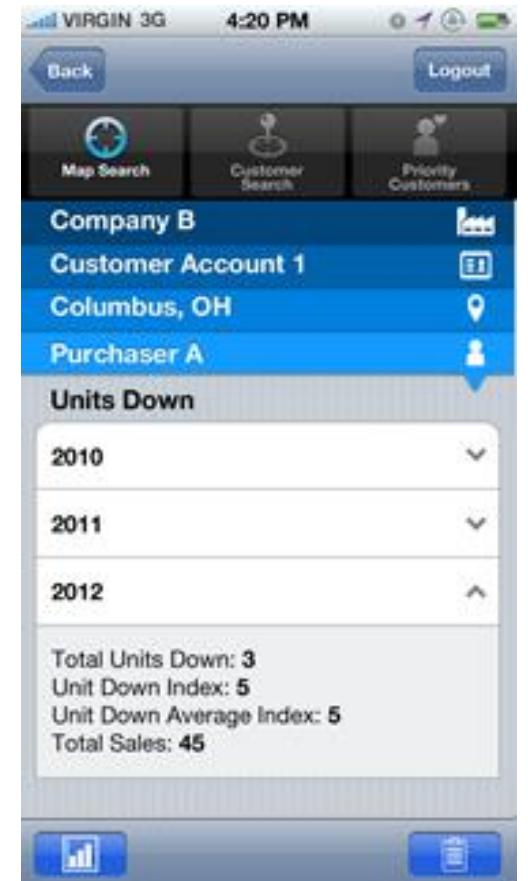
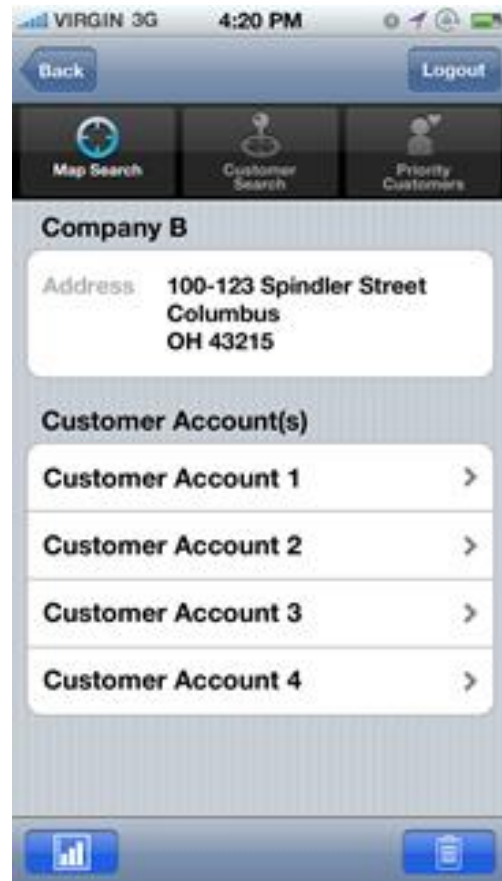
We deliver success **smile after smile.**

"Colligo met all our criteria in an easy to use iPad app. With Colligo, our sales people are much more responsive, and also more productive, since they respond to each dentist's questions on-site and don't need office time later to catch up."

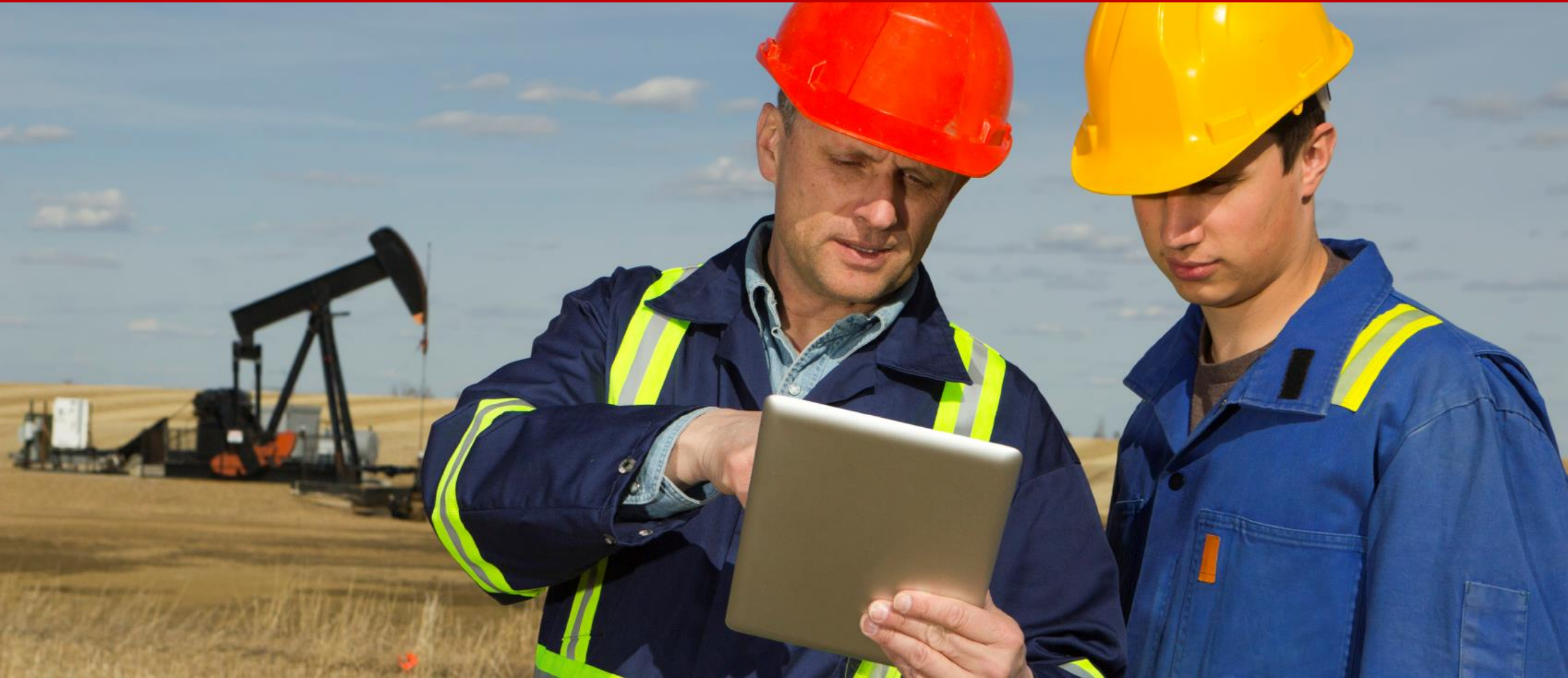
Terry Barrett
VP of Information Technology



Custom mobile sales application with BI



Scenario 3: Field Engineers & Technicians





Field Engineers & Technicians

Contacts: Team, vendors, clients

Data Access: Projects & schedules

Content: Safety, procedures

Forms: Regulatory

Rich media

Offline access

Insight: Auditing & reporting

A photograph of two men in blue work jackets and hard hats (one red, one yellow) looking at a tablet. The background is a blurred outdoor setting.

Field Engineers & Technicians

Contacts: Team, vendors, clients

Data Access: Projects & schedules

Content: Safety, procedures

Forms: Regulatory

Rich media

Offline access

Insight: Auditing & reporting

SharePoint & Office 365

Contacts: Groups members

Schedules: SharePoint, Exchange, Groups

Content: OneDrive for Business

Forms: Records management

Media: Libraries, Office 365 Video

Insight: SharePoint auditing



“We needed a solution that would ensure our field workers have the latest content – even when in remote areas where there is no connectivity. Colligo is fast, easy to work with, and content is available offline. Importantly, it is allowing our technicians to work more safely.”

Mike Wright
Business Systems Analyst



Property Management O365 Web Application

Office

Contoso
Property Management

Hi Toddb@cd1.onmicrosoft.com [Sign out](#)

Maintenance

0 Upcoming inspections

17 Past inspections

6 **Need repair**

10 Repair complete

Need repair



Au Residence

Room: Kitchen
Property owned by Margaret Au

Not Scheduled

Inspector: Rob Barker



Wright Residence

Room: Lower Bathroom
Property owned by Steven Wright

Not Scheduled

Inspector: Rob Barker



Jump Residence

Room: Bathroom 2
Property owned by Dan Jump

Scheduled

6/26/2015

Inspector: Rob Barker



Au Residence

Room: Kitchen
Property owned by Margaret Au

Scheduled

6/30/2015

Inspector: Rob Barker


◀ 1 2 ▶

Office

Contoso
Property Management

Hi katie@techdairif04.ccscpt.net [Sign out](#)

Inspection Details



Au Residence
2002 Noo-Hill Ave N
Owned by Margaret Au

Inspector: Rob Barker
rob@techdairif04.ccscpt.net

Property Members

- Ron Gabel
- Katie Jordan
- Tenant Admin
- Allia Lawyer

[See More](#)

Conversations

Event Created in DNA
The new Au Residence group is ready

[See More](#)

Recent Documents

- Inspection Report 3.docx
- Inspection Report 4.docx

[See More](#)

Notes

Incident[17]

[See More](#)

Dispatcher Email

Inspection Report - <Au Residence> -
<06/15/15>

[See More](#)

Property Files

- Inspection Report.docx
- Inspection Report 2.docx
- Inspection Report 3.docx
- Inspection Report 4.docx


[See More](#)

[Choose File](#) no file selected

[Upload](#)


Schedule a repair

Inspection



[Annotate Images](#)

Videos



See inspection comments See incident details

Dispatcher comments

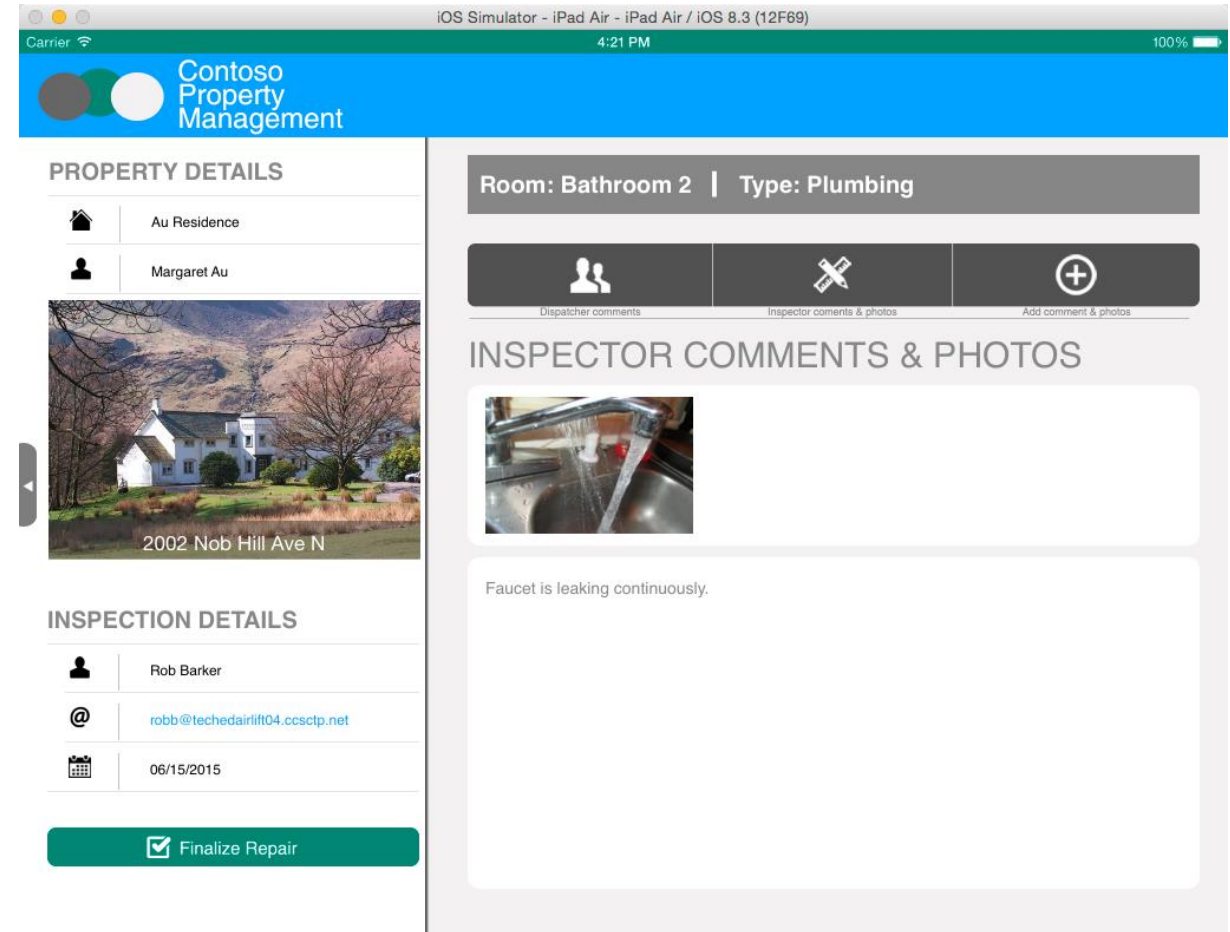
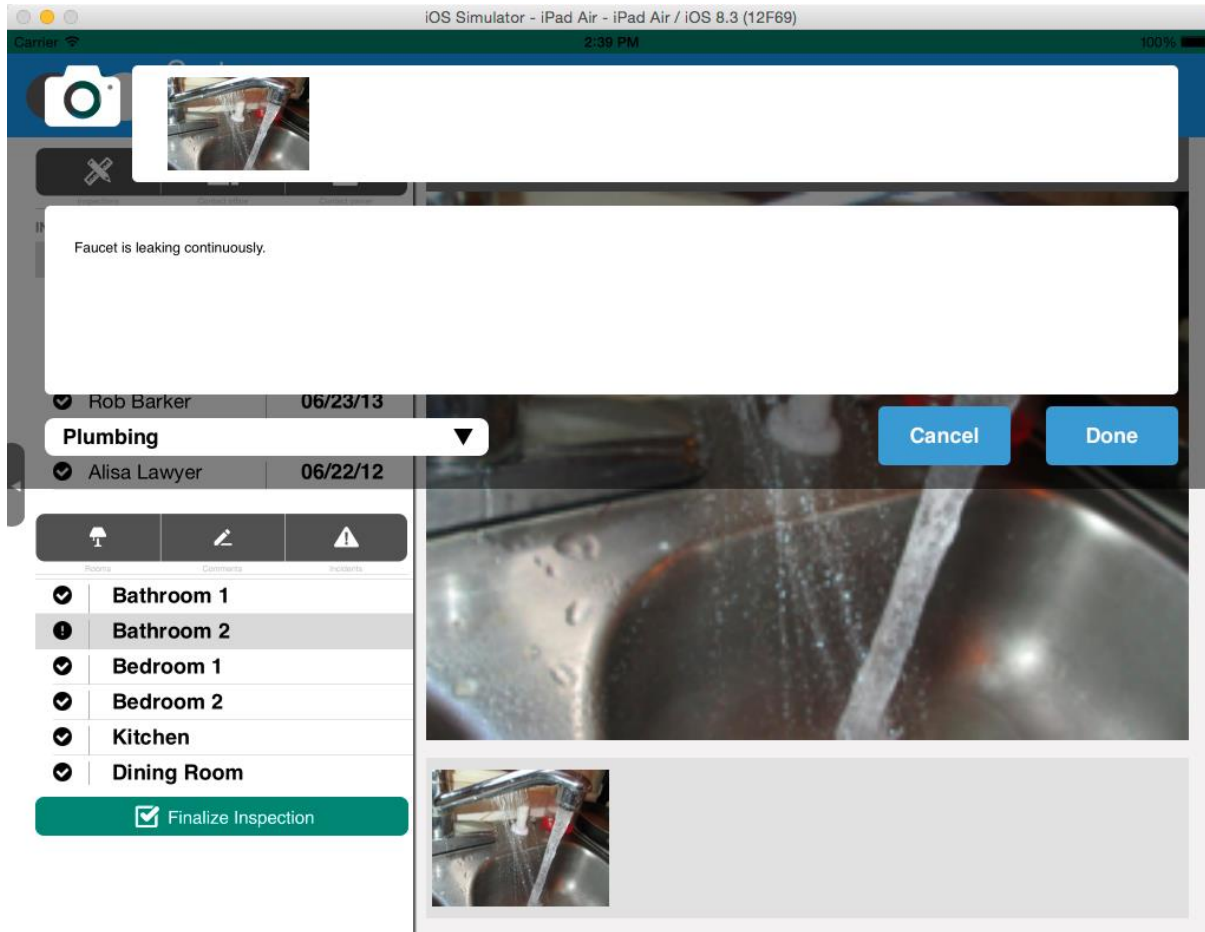
Repair person: Ron Gabel

Date: 6/16/2015

Time: Available Time Slots

[Schedule Repair](#)

Property Management Mobile Applications



Scenario 4: Professional Services





Professional Services

Offline access

Collaboration

Knowledge management

Findability

Email management

Records management

E-Discovery



Professional Services

Offline access

Collaboration

Knowledge management

Findability

Email management

Records management

E-Discovery

SharePoint & Office 365

Collaboration: Office & web apps

Information architecture: Taxonomy

Repositories: OD4B, sites, groups

Findability: Search, Delve, InfoPedia

Email management: Outlook, groups

Records management: Sites

E-Discovery: Office 365



“Colligo allowed customer-facing users to access files on the road, making it easy to stay up-to-date. With Colligo, they can work on their email and collaborate on documents at the same time, all from within the Outlook interface.”

Nishan DeSilva
Director of Information Management &
Corporate Records Compliance



Microsoft "Matter Center"

The screenshot displays the Microsoft Outlook interface. At the top, there is a ribbon with various action buttons like 'Delete', 'Reply', 'Forward', 'Meeting', 'IM', 'More', 'Quick Steps', 'Move', 'Rules', 'OneNote', 'Assign Policy', 'Unread/Read', 'Categorize', 'Follow Up', 'Search People', 'Address Book', and 'Filter Email'. Below the ribbon, the left pane shows a list of emails. The selected email is from Thomas Evans, dated Thu 8/14/2014 12:35 PM, with the subject 'Documents for Merger Matter'. The main pane shows the email content, including a 'Message' section with an attachment 'Northwind Traders Merger.docx (12 KB)'. Below the message, the 'Matter Center Beta' feature is visible, which includes a search bar and a list of 'Pinned Matters'.

Search Current Mailbox (Ctrl+E) | Current Mailbox

All Unread By Date Newest

Today

Thomas Evans
Documents for Merger Matter 12:35 PM
As discussed, I've attached the initial merger documents for your

Neva Case
RE: Draft Acquisition Agreement 12:33 PM
I took a look at that draft agreement. It looks good to pass on to

Thomas Evans
Commercial Property Lease in WA 12:31 PM
I'm ready to go ahead with signing the commercial property lease

Sanford Bowler
Fabrikam Financials 12:29 PM
The client sent over the financials today. From what I understand

Sanford Bowler
Coho Winery Draft 12:27 PM
I've done another round of edits on that draft. Let me know what

Nicole Hopkins
In-Person Negotiations 12:15 PM
It looks good to go ahead and sit down with opposing counsel. I

Nicole Hopkins
Tailspin Toys Acquisition 12:13 PM
Let's have a call at 10am tomorrow to discuss my latest thoughts.

Neva Case

Reply Reply All Forward IM

Thu 8/14/2014 12:35 PM

Thomas Evans <thomas.evans.nw@outlook.com>

Documents for Merger Matter

To Laura Chapman

Message Northwind Traders Merger.docx (12 KB)

Matter Center Beta

Search (e.g. matter name, matter id, keyword)

Pin this search | Pinned Searches

Pinned Matters Recent Matters Clients Sort by: None

Northwind Traders Merger 1000724.00055	Alpine Logo Trademark a... 1007945.00007	Blue Yonder Acquisition o... 1009142.00042
S Merritt Professional Ser... 1001231.00032	Adventure Works Acquisit... 1006788.00025	Benson Property Lease A... 1006788.00039
First Up Acquisition of LHC 1001231.00009	Coho Winery and Vineyar... 1008007.00018	A Datum Contracting Dis... 1001231.00030

1 - 9

Mobile Requirements Checklist

Mobility

- When needed
- Across devices
- Where needed
- Low speed/latency
- Offline
- Secure

User Experience

- Easy: "discoverable"
- Integrated: "native"

Content Requirements

- Documents
- Contacts
- Calendars
- Tasks
- Lists
- Forms
- Media
- Business data
- Business intelligence
- Conversations

Enterprise Content

- Information architecture
- Findability

Adoption & Usage

- Measurable

Governance

- Access control
- Rights management
- Records management
- Auditing
- Reporting
- E-Discovery
- Supportability

Configure, Build, Buy Matrix

	Mobility	When needed	Across devices	Where needed	Low speed/latency	Offline	Secure	User Experience	Easy: "discoverable"	Integrated: "native"	Enterprise Content	Information architecture	Findability	Adoption & Usage	Measurable	Information Governance	Access control	Rights management	Records management	Auditing	Reporting	E-Discovery
Content Requirements	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Documents																						
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<input type="checkbox"/> Business intelligence																						
<input type="checkbox"/> Conversations																						

Configure, Build, Buy
Importance, Cost, Risk

Words of Wisdom

UNDERSTAND

what SharePoint & Office 365 offers

ALIGN

your business requirements with the capabilities of the services

CONFIGURE, BUY or BUILD

the solution, mixing and matching experiences & services

OPTIMIZE

the solution because it cannot be ideal or perfect

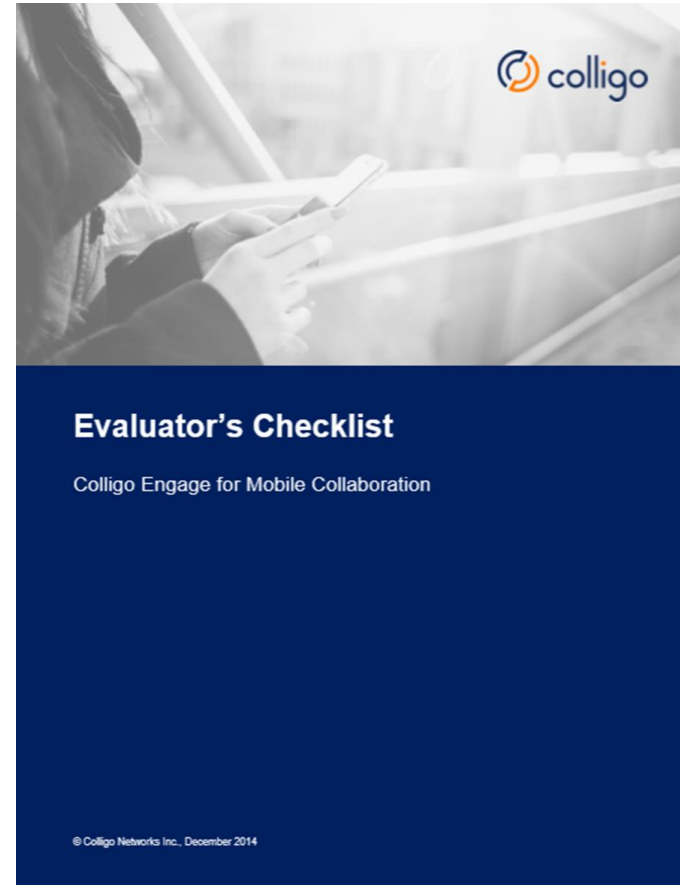
ACCOUNT

for total cost: build, support, evolve

MEASURE

your success

Next Steps ... FREE Tools for Success



FREE TRIAL

www.colligo.com

Next Steps ... Resources from Canviz

O365 / SharePoint Mobile Services

iOS
Android
Windows Phone
Cordova
Xamarin

<http://bit.ly/canvizmobile>



Code Samples & Training Sessions

Property Management Code
Sample

<http://bit.ly/propman>

iOS and Android Apps with
Office 365

<http://bit.ly/o365mobileapps>



A **mobile enabled** robust and extensible menu and navigation solution for your O365 SharePoint tenancy or your on-premises SharePoint installation.

FREE TRIAL

<http://bit.ly/one-nav>

Next Steps ... Resources from IT Unity

ITUNITY.COM

Great articles from Dan, Todd & others

ITUNITY.COM/UNITYVISION

Webinars and web shows

ITUNITY.COM/NEWSLETTERS

Expertly curated content, news, and guidance

UNITYCONNECT.COM

SharePoint & Office 365 conferences
in person and online



Innovation. Technology. Community.

