HG TECHNOLOGY
Innovation & Transformation

CASE STUDY

shipleys LLP

> We were very impressed with HG Technology implementing our SharePoint project. It all ran on time and to budget which was especially impressive given all was done during remotely. They listened to our requirements and we are very pleased with the finished result
>
> *Robert Wood, Principal*

Shipleys work with a medium number of files, both customer related and internal, so our focus was building a structure to manage this in the Cloud. By creating a document management system on SharePoint we moved forward from their existing DMS while maintaining many of the existing workflow benefits.

Shipleys, being a large accountancy firm, not only needed effective document management, but a system that could be integrated with their existing time billing system – in this case, Practice Engine. We implemented an automated workflow that would bring through new information created in Practice Engine, add it to the information stored in SharePoint, and use it for automated folder creation. This process creates a standardised naming convention and also greatly reduces repetitive entry.

Throughout the discovery phase, we learnt that document population was a regular exercise at Shipleys, and therefore, we decided that an Automated-Templates function would be beneficial. Implementing this saves their users hours of valuable time. This feature takes names, addresses and other contact details from Practice Engine and populates a word document via a simple to use form.

Another feature was regular post and undirected email which needed to be filed. To avoid documents getting lost or being filed incorrectly, we provided a specialised In-Tray system. This allows documents to be store in the correct customer area but tagged to the relevant employee for action.

This project was an unusual challenge as Shipleys already had good processes within the current server-based document management system. What HG Technology provided was enhanced functionality based on the Microsoft SharePoint environment which saved considerable cost and improved performance.

For more information contact: HG Technology, Great West Road, Brentford, TW8 9AG
Telephone: +44 (0)845 366 5830 Email: enquiries@hgtechnology.co.uk Website: www.hgtechnology.co.uk