

## 1. The Challenge

Shipleys, a large accountancy firm, needed to move their document management system (DMS) to the cloud while maintaining the benefits of their existing workflow. With a medium volume of both customer-related and internal files, they required a solution that could integrate with their time-billing system, Practice Engine, and improve operational efficiency.

## 2. The Approach

HG Technology created a cloud-based document management system on SharePoint, which retained many of Shipleys' previous workflow benefits. An automated workflow was implemented to integrate Practice Engine with SharePoint, allowing automatic folder creation and standardised naming conventions. Additionally, an Automated-Templates function was introduced to save time by populating documents with customer details from Practice Engine. A specialised In-Tray system was also created to ensure accurate filing of post and undirected emails.

## 4. The Feedback

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

## 3. The Outcome

The migration to SharePoint streamlined Shipleys' document management processes, saving significant time and reducing repetitive data entry. The automated features and integrated systems improved efficiency, making the management of files and client information simpler and more accurate.