

Case Study

Company Profile

Originally founded in 1965, Endsleigh has since grown to become one of the UK's leading independent intermediaries.

Endsleigh aim to provide products and services that are for career professionals, offering a direct service which is designed to save time and money - via the internet and telephone.



Endsleigh Insurance deploy a SharePoint Document Management Solution, with advanced Outlook integration.

Challenge

Endsleigh required an add-on to provide a simple way to copy or move emails from Outlook 2007 to Sharepoint and also to enable document creation in Office applications and then save them directly to Sharepoint. Movement of documents between Sharepoint libraries was also a problem and they also required a simplified method of achieving this.

Summary

Endsleigh Insurance Services Ltd is a UK based insurance provider. They had deployed SharePoint 2007 across their organisation of 800+ employees and were seeking an add-on to enable advanced document and email management. This would be particularly beneficial in project management, where email with external partners was common and a way store emails in an accessible and centralised location essential.

Solution

ClearPeople worked with Endsleigh to provide a solution to extend SharePoint as a document and email management system. ClearPeople implemented MacroView DMF with integration to Microsoft Word, Excel, PowerPoint and Outlook.

Endsleigh have been provided with:

- Integrated document management on SharePoint from within Microsoft Office 2007.
- Highly efficient browsing and navigation of their large number of SharePoint document libraries.
- Drag and drop to upload files to SharePoint and move files between SharePoint Sites and Libraries
- Streamlined meta-data capture.
- Extended offline operation.
- Streamlined installation and deployment.
- Support for very large document libraries.
- Full .NET compliance.

Technical Description

ClearPeople achieved Endsleigh's requirements by building upon their existing SharePoint platform. They implemented the full MacroView Document Management Framework to take full advantage of functionality for document and outlook integration in their Microsoft Office applications. MacroView DMF is developed by Macroview Business Technology and forms part of ClearPeople's growing portfolio of Best-of-Breed add-ons for SharePoint.

Result

Endsleigh reports that the implementation of Macroview DMF has saved a substantial amount of time for those key users who need to manage emails as effectively as documents in Sharepoint. In addition, important emails which otherwise would have remained in Outlook folders can now be easily stored where they should be with proper metadata.