

MICROSOFT 365 AS YOUR DOCUMENT MANAGEMENT PLATFORM



epona



SUMMARY

By combining Microsoft 365 with Epona DMSforOffice you can use it as a fully functioning DMS platform, and combine it with the power of the rest of the Microsoft 365 software suite. This allows you to cut out obsolete software and simplify your IT landscape. This will reduce costs, save time, and improve your information management and security capabilities at only a fraction of the costs of buying single purpose tools.

STOP SEARCHING, START FINDING: AT HOME, AT WORK, ON YOUR MOBILE DEVICE

For modern businesses, having access to your critical information in a timely way is the key to success. You need to have all of the information, any e-mail, any document, any kind of data regarding your current project easily accessible at any time, from any place and from any device.

Your team wants to be able to collaborate on documents, discuss by way of various means (chat, video, phone, e-mail) the state of the project, and management requires cost effective spending on technology. You want to find a way to tie it all together, management does not want duplicative tech solutions that are not integrated, and they definitely do not want to have three ways to do the same thing – especially if two of them end up being unused. Couple these needs with the fact that the knowledge/know-how and information that your company stores grows exponentially every year.

Finding useful ways of structuring and being able to find the information you need becomes harder and harder over time. Especially when it comes to unstructured data like PDF's, images

(pictures) or Word, Excel and PowerPoint documents. The increase of data also means increased spending in data storage, additional information management software, the time and resources to manage these services. And yet, there is no calculator to determine the costs of companywide inefficiencies since people lose a lot of time searching for information they often cannot find.

MANAGING THE IT LANDSCAPE

Over time companies invest in a patchwork-like solution. Multiple solutions with overlapping capabilities are purchased as different vendors have different vertical focuses and can speak the language of each department. This creates the proverbial IT support nightmare where internal IT resources require multiple external service providers to meet the needs of the firm/company in a sort of departmental confederacy of IT Solutions.

This results in, aside from data being stored in all sorts of places, in a nearly unmanageable IT-landscape. You are most likely spending money on overlapping services or paying for things that you do not need. So now you are losing both time and money on IT, while the answer is most likely already present within your own company. The one size fits all approach has never worked for dynamic businesses, but neither has the any solution for any need paradigm.

MICROSOFT 365 WITH DMSFOROFFICE: THE PLATFORM CONFIGURED FOR YOUR BUSINESS REQUIREMENTS

In 2017, Microsoft Office 365, a cloud based infrastructure solution for many of the ubiquitous solutions, like Microsoft Exchange, was launched to great fanfare. By 2020, many of the worries and concerns about entrusting Microsoft to be the keeper of your data on their servers in the cloud has been laid to rest. Hundreds of thousands of companies and firms use Microsoft 365 services.

These same firms and companies are already familiar and have many years of time and investment in the desktop solutions of Word, Excel, Outlook, and PowerPoint. What if your company or firm could use take advantage of the tools and capabilities that are already existent in your monthly Microsoft 365 cloud subscription and continue to use as you always have, the familiar Microsoft Office suite of Word, Excel, Outlook, and PowerPoint?



Microsoft 365 can be used as a fully functioning Document and E-mail Management System. By using Epona's DMSforOffice in combination with your already available Microsoft 365 licenses you can set up a fully searchable information store for all your unstructured data sources like e-mail, documents, PDF's, images, spreadsheets, videos and other content.

What does this mean for your infrastructure costs, monthly spend on IT, and your ongoing needs and future growth? It means savings and simplicity. It means unified technology solutions and best of all, the largest support infrastructure on the planet.

Less tangibly, but more importantly perhaps, it means cutting out all sorts of unnecessary management or search related software, since the Epona configured Microsoft platform DMS makes every e-mail or document accessible. Moreover, newly created information can be stored in the DMS easily, by the people who created the documents and e-mails. And since the Epona DMS is a turn-key solution, there is only one provider you need to call to take advantage of your already deep investment in Microsoft 365.

DMSFOROFFICE: DOCUMENT AND E-MAIL MANAGEMENT MADE EASY

Epona DMSforOffice takes the hassle out of finding information. All your information is stored in Microsoft 365/SharePoint Online, in discrete 'virtual buckets' that can have tags (metadata) associated with each bucket, along with security (who can see its contents), records management (when to archive or destroy it), OneDrive (offline and local synchronization), OneNote (Pen based Note taking), Teams (Collaboration), Workflow (step by step programmed processes), and so much more.

What this means is that now all the firm/company data is backed up, secure, and accessible through your iPhone, iPad, Android Device, and Computers. It means your teams can collaborate, and all the content is stored in one place, based on the organizational requirements for your data.



But most importantly, now everyone can find everything (that they are authorized to see) by searching for a single word, and drilling down through useful categories and refiners to find what they are looking for. Or if they know more, starting there. The advanced search functions of DMSforOffice allow for your search to reach beyond basic metadata, but even look for content within documents. You will no longer have to remember 'where' you put the document, or where you saved the e-mail, it will only matter if you saved it to the Epona DMSforOffice location.

You can save e-mails and documents directly to the DMS, straight from your inbox, Word document, Excel spreadsheet, PowerPoint presentation, PDF or while working in a browser in Office.com. No more saving and dragging/dropping to separate locations. Now you can save information directly where it needs to be stored, and by doing so, automatically adding document id's, metadata tags, and more. This way you prevent duplication of content and saving to insecure locations. When filing your work product (documents and e-mails) with DMSforOffice to your DMS, not only are the correct tags added to your files, but the correct security settings are also added, so it can be found by only the right people.

COLLABORATE ANYWHERE, ANY TIME WITH MICROSOFT TEAMS

The Microsoft 365 suite allows you to use a variety of collaboration and sharing tools that otherwise would need to be purchased separately. Your co-workers can now collaborate on documents directly in your DMS while inside of Microsoft Teams.

Because of the excellent mobile apps for multiple devices they can also work on any file or chat with anyone regardless of their location, device, or time. So what does this mean in your daily office routines? It means, you will be using standard, native, Microsoft Teams that has a correctly configured backend which is designed to function as a Document Management System for your enterprise, by your enterprise, with Epona's help.



SECURITY AND MANAGEMENT

Information security should be one of the main concerns of any company. Your information is stored in a private Microsoft 365 tenant on the Microsoft Azure cloud platform. There is no safer place. The infrastructure and software are constantly monitored, updated, and audited by Microsoft and independent security teams.

The tenant can also be located in almost any geographic region you chose (local regulations may apply to your available options). Since reliability and safety are at the heart of Microsoft services you can rest assured that your data is safe. You are using the global standard of security, Microsoft. Epona is the service provider that configures your tenant to work as you prescribed, for document management. Your tenancy at Microsoft, your security model, at Microsoft.

DISCOVER NEW POSSIBILITIES

The Microsoft 365 license gives organizations access to often undiscovered tools. It covers much more than just your regular text and spreadsheet editor. As stated earlier, you can get access to the online collaboration and meeting tool Microsoft Teams. And the possibilities become endless when you look at other tools that are now often purchased from separate vendors: SharePoint gives you a fully functioning intranet for internal communications and is the basis for the Epona DMSforOffice system. OneDrive gives you safe online file sharing and storing over multiple devices. Stream allows for easy online video sharing, Power BI gives you powerful Business Intelligence and Analytics functions, Power Automate adds multiple workflow and task management tools giving you more efficiency than ever before.

When choosing Microsoft 365 (depending on your license type) you also get access to security features often only available to large enterprises. Mobile Device Management gives you the possibility to remotely lock or wipe any connected device in case of theft or loss. You can also remotely deploy and manage apps to devices so you can ensure that everyone in your organization

has the correct software available to do their work (Intune). The intelligent monitoring and reporting tools allow for easy compliance with advanced security dashboards and overviews over all your connected devices, software and other cloud solutions.

STOP SPENDING YOUR MONEY TWICE WHEN BUYING SINGLE PURPOSE TOOLS

When we began this article we started by discussing how enterprises will invest in solutions for each department (Vertical Solutions) wherein each vertical solution has overlapping capabilities with each department's other solution set. Businesses are overpaying for solutions and underutilizing their capabilities. Along with this also fully invested in Microsoft 365, and have made the full investment in 100% adoption of Microsoft Exchange, but have yet to make the second and most important step, which is to deploy SharePoint as their document management system.

Once you do that, the rest of the Microsoft 365 solution offering becomes significantly more important because now all the other tools become vibrantly more useful and interconnected. Companies and Firms are beginning to understand that they can now use the Microsoft 365 platform to end the myriad of departmentally based vertical solutions and deploy 'on top' of the Microsoft 365 a single DMS solution set, that is vastly more cost effective, takes advantage of a single platform, and can be managed more easily and centrally.

CONSTANTLY DEVELOPING

The Epona DMS and Microsoft 365 are constantly developing and gathering customer feedback to improve our services. Already commercially available from Epona using the Microsoft platform is Teams oriented workflow solutions, contract management tools, and Machine Learning based improvements like Automatic E-mail (Predictive) Filing, and Dashboard technology which provides timely and instant reporting to assist management teams in their reporting requirements.

START SIMPLIFYING, START FINDING WITH EPONA

Do you want to stop wasting time searching for information, and start finding it? Do you want to simplify your IT-landscape and lower your IT-spending at the same time? Contact Epona now for a personal consult. Go to www.epona.com/contact or e-mail sales@epona.com.



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Take the next step

