



Using Sharepoint for the central Control of Input and Output

February 12th to 14th, 2007
Convention Center
Hotel Estrel, Berlin, Germany

 Microsoft®
**Office SharePoint®
Server 2007**

Beta Systems Software AG

- High-quality software products and solutions ensures the secure and efficient processing of large quantities of data in:
 - Information management at data centers
 - User management
 - Document management
- Turnover: 95.6 Mio. € (2005)
- Employees: > 680 worldwide
- Customers: > 1,300
- Headquarters: Berlin

We are proud of our customers

- 7 out of 10 of the largest European insurance groups
- 50 % of the largest European banks
- 6 out of 8 of the largest European automobile manufacturers
- 18 out of 30 DAX companies
- 50% of EUROSTOXX companies
- Our customers use our products to
 - Process more than 2.4 Million payment document per day at one banking organization in Croatia
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 - Process more than 110 Million documents as inbound mail per year in the insurance sector

More than 1,300 customers with more than 3,000 productive installations put their trust in Beta Systems

Banks

Credit Swiss | Barclays | Deutsche Bank | KfW Bankengruppe | ING Bank | Citi Group | Deutsche Bundesbank | Postbank | HypoVereinsbank | Dresdner Bank | Bundesamt für Finanzen | LBS | Bank Austria | HSBC Trinkhaus & Burkhardt | Commerzbank | Bank of Scotland | ABN Amro | DaimlerChrysler Bank | Hypo Vereinsbank | Fiducia | JPMorganChase | Central Bank of Nigeria | Nord LB | Chase | Lloyds TSB | BAWAG | West LB | Sparkassen Informatik | DZ Bank | UniCredit Group | Deutsche Apotheker- und Ärztebank | BBVA | Bank Śląski | FNB of South Afrika | Zagrebačka banka

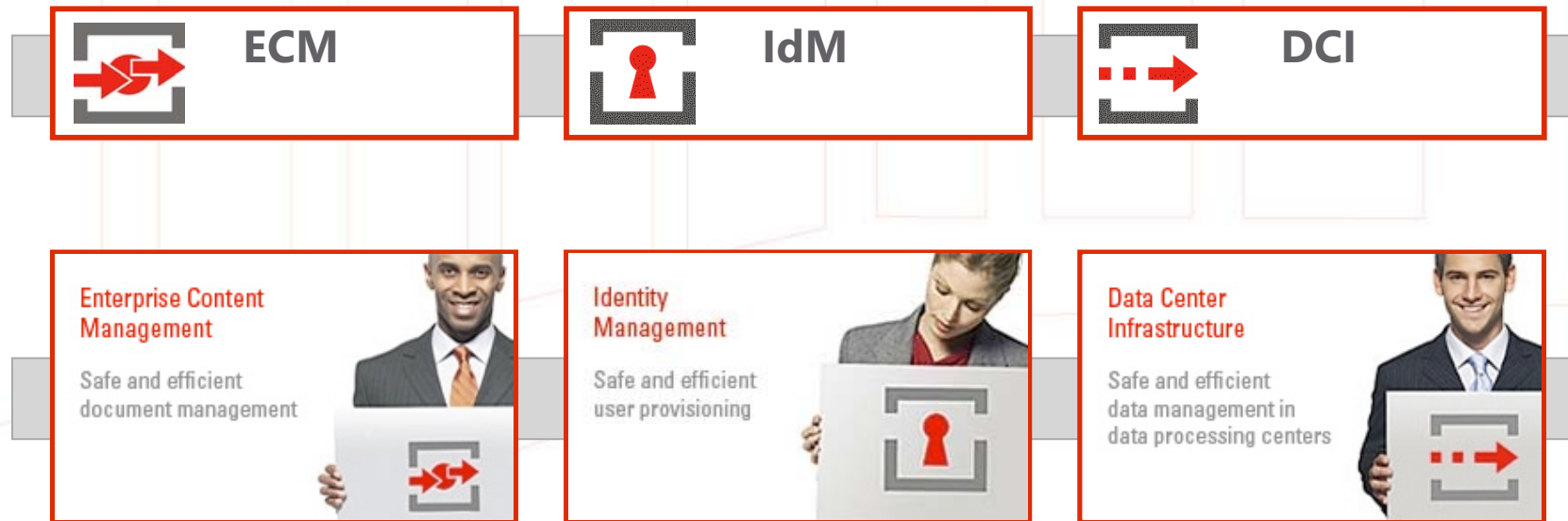
Insurance companies

Allianz Group | DEVK | AOK | AXA | Advocard | ZURICH | Cosmos Direkt | Versicherungskammer Bayern | Aurora | KKH | Securitas | Generali | LVM | Volksfürsorge | SIGNAL IDUNA | SECURA | Techniker Krankenkasse | ARAG | Aachener und Münchener | BHW | HUK Coburg | Volkswohl Bund | Concordia | Provinzial | Fortis | R+V Versicherungen | Partena | Principal Insurance Group | Groupama | Deutsche Angestellten Krankenkasse | GuideOne | Versicherungskammer Bayern | First American | DBV Winterthur | deGoudse | Sparkassen Versicherungen | VHV Versicherungen

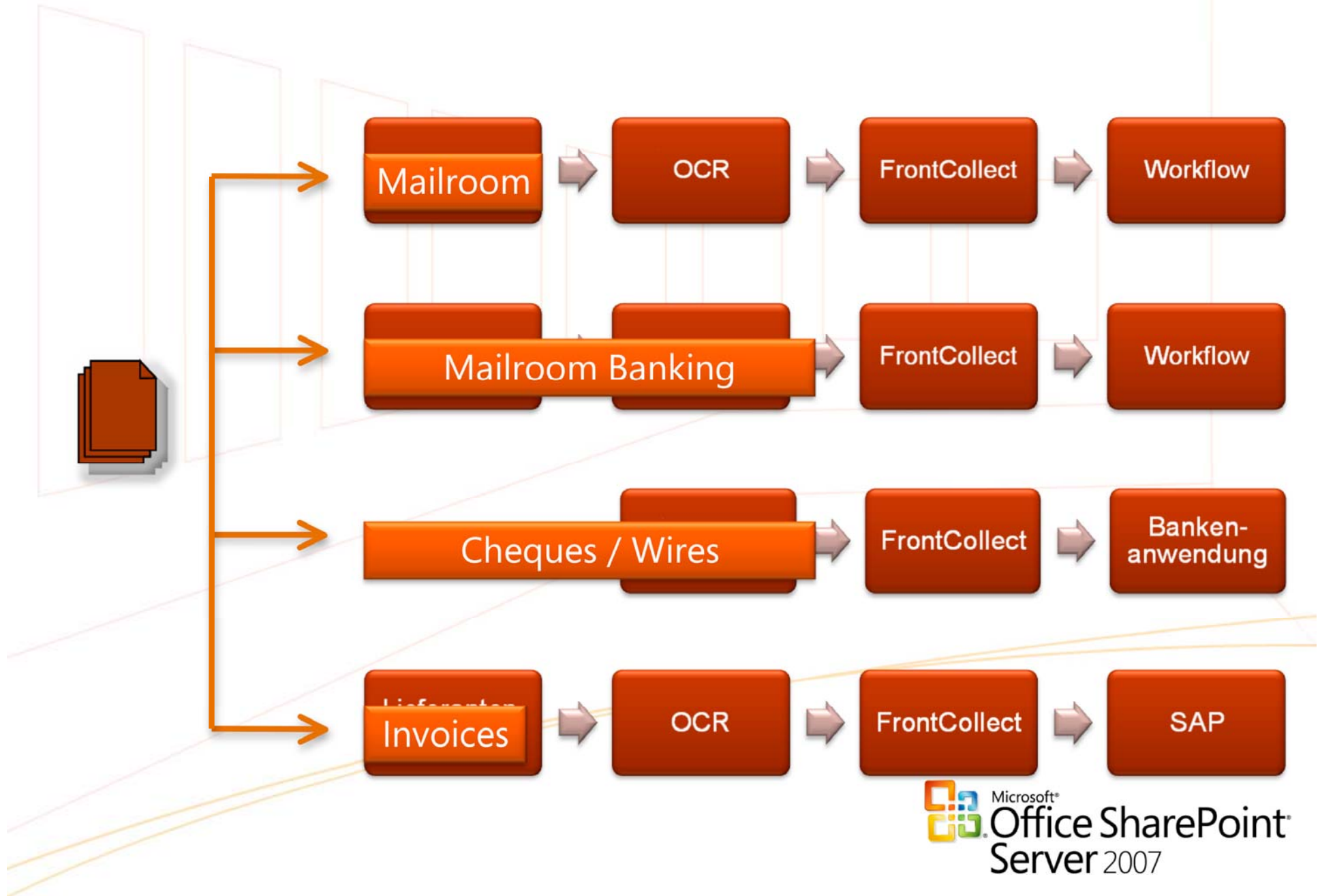
Industry

BMW | Volkswagen | ARAL | Shell | Airbus | FESTO | BASF | Mazda | Henkel | DEKRA | Porsche | Schering | Beiersdorf | ABB | DaimlerChrysler | Sony | Konica Minolta | Minol | Siemens | Audi | tyco Electronics | RWE | Ferrero | Nestlé | Linde | Vattenfall | Trumpf | Vaillant | EDS | WM-data | Exxon Mobil | Metzeler | Southwestwater CO UK | Lufthansa | Metro | ThyssenKrupp | TUI | Stinnes | Deutsche Bahn | Spar | IBM | T-Systems | REWE | IKEA | Finnair | Iberia | Swisscom | Telefonica | WAL*MART | Swarovski | DocMorris | KarstadtQuelle | Teledata | DATEV | Telekom Austria | Tesco | RAG Informatik

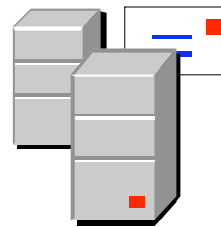
Our software solutions make a major contribution to the automation, security and auditability of business processes.



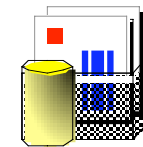
Generic View



Input Management from Email's point of view



Exchange Servers



Mailbox Store

Connector

FrontCollect

Classification

Document-Information

DocType: Proposal
Sender: Your Best Customer, Inc.
Attachment: No

Request for Proposal

Dear Sirs,
Please send an updated proposal.
Regards
Your Best Customer, Inc.

Functional Approach

- **Workload Separation**
 - Content independant tasks
 - Open Mail / Documents
 - Scan Mail / Documents
 - Classification / Recognition using FrontCollect
 - Correction / Validation
 - Content dependant tasks
 - Result of classification is:
 - Document Type and key content
 - Workflow / Business Process integration

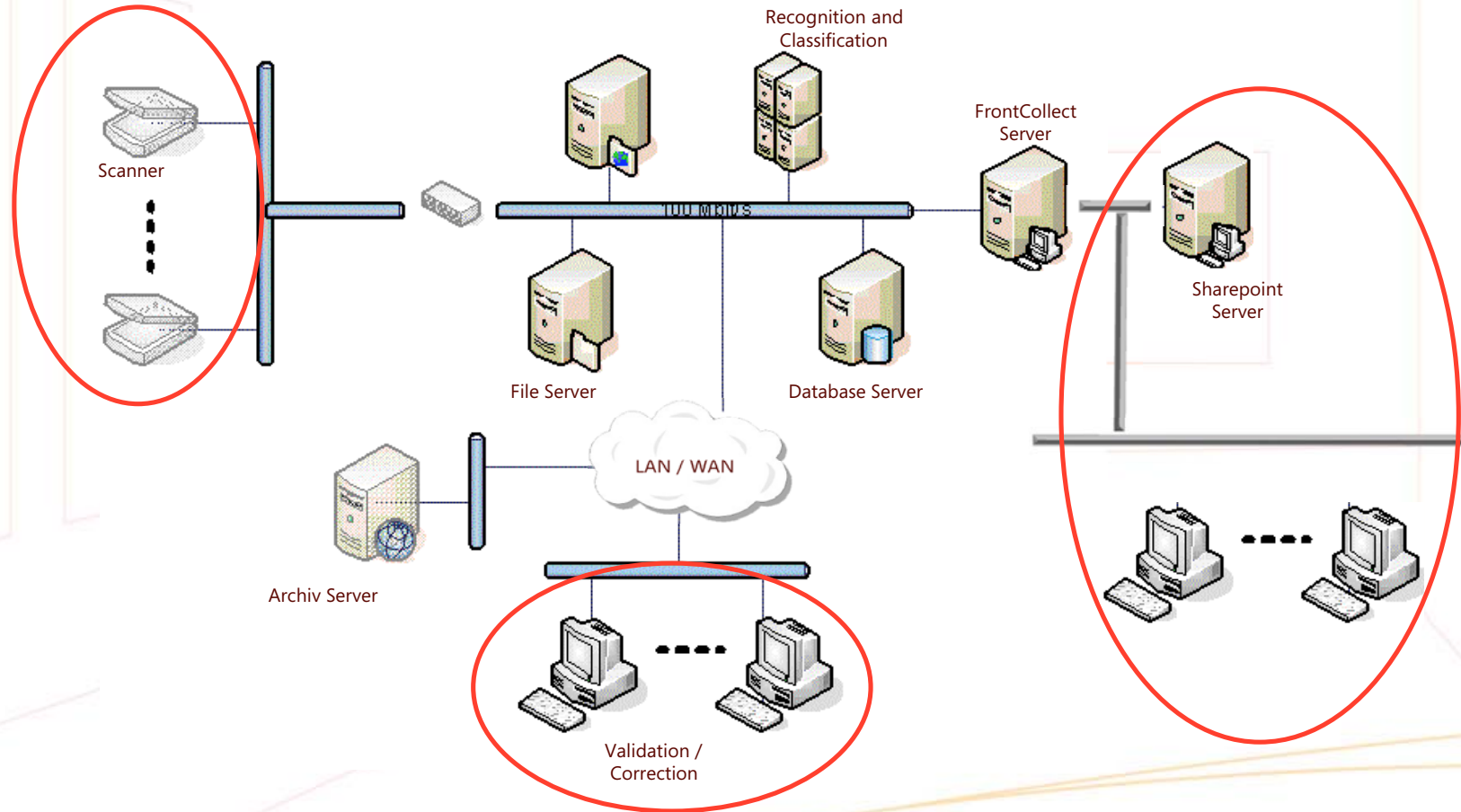
Power User versus infrequent User

- Document independent tasks are designed to meet high volume requirements
 - Throuput
 - User Interface and User Experience
 - Regardless of content
- Power User can be given almost any software and interface style
 - As long as the job gets done in an (also cost) efficient way
- Document services broaden the target group of document recipients
 - Department Heads
 - Cost Center Owners

Software and Services for the infrequent user

- Document processing needs to be integrated into Business Process
 - And must not require additional training on how to process the documents
 - Excellent User Experience required
- Using Sharepoint as central control and information center enables
 - Documents to be delivered to EVERY user in the organization
 - Documents to be processed by EVERY user in the organization
- Inbox informs about tasks
- User Interface guides the user through the task at hand
- Company Guidelines and Compliance Rules are embedded into the process
- Faster, better and higher quality of document processing

Technical Approach



Software Services

Inbox Reklamation

Type	Title	Edit	Modified	Modified By	Familienname	Strasse	Hausnummer	PLZ	Ort	Datum	Kundennummer	Lieferrnummer
Indizierstatus : erfasst (8)												
	Reklamation1		9/4/2006 1:53 PM	System Account	Schulenburg	Hohenrieder Weg	7d	85250	Altomünster	04.09.2006	4711	0815
	Reklamation_Peter_Perfekt.doc		9/8/2006 10:40 AM	System Account	Perfekt Peter	Normstraße	1	79111	Freiburg	11.09.2006	KD-00012-34	LS-0044422
	Reklamation_Susi_Sauer.doc		9/8/2006 10:40 AM	System Account	Sauer Susi	Murphy Weg	7	86368	Gersthofen		KD-01189-12	LS-0010201
	Reklamation_Tanja_Tauschfrau.doc		9/8/2006 10:41 AM	System Account	Tauschfrau Tanja	Second Hand Road	3	80123	Munich	9.9.06	KD-01189-12	LS-0003542
	Reklamation_Matze_Meckermann.doc		9/11/2006 5:14 PM	System Account	Meckermann Matze	Rue de la Doleance	89	10300	Berlin	15.09.06	KD-00489-88	LS-0320225
	Reklamation_Friedolin_Fruchtbar.doc		9/8/2006 10:41 AM	System Account	Fruchtbar Friedolin	Große Sippe Allee	4a	64331	Weiterstadt	12.09.2006	KD-00776-17	LS-0033405,
	Reklamation_Arnold_Achter.doc		9/8/2006 10:41 AM	System Account	Achter Arnold	Runde Gasse	7	D-70565	Stuttgart	12.09.2006	KD-00406-11	(LS-0002242)
	unbekannt.doc		9/11/2006 6:40 PM	System Account	Meckermann Matze	Rue de la Doleance	89	10300	Berlin	15.09.06	KD-00489-88	LS-0320225
Indizierstatus : korrigiert (1)												
	Reklamation_Norbert_Nimmerfroh.doc		9/11/2006 6:31 PM	System Account	Nimmerfroh Norbert	Triste Straße	13a	86150	Augsburg	10.09.2006	KD-00515-23	LS-0240475

Add new document

Links

There are currently no favorite links to display. To add a new link, click "Add new link" below.

Add new link

Inbox Bewerbung

Type	Title	Edit	Modified	Modified By	Familienname	Strasse	Hausnummer	PLZ	Ort	Stellenbezeichnung	DocID	Referenznummer
Indizierstatus : korrigiert (1)												
	Bewerbung1		9/11/2006 5:26 PM	System Account	Schulenburg	Hohenrieder Weg	7d	85250	Altomünster	Programmierer		0815

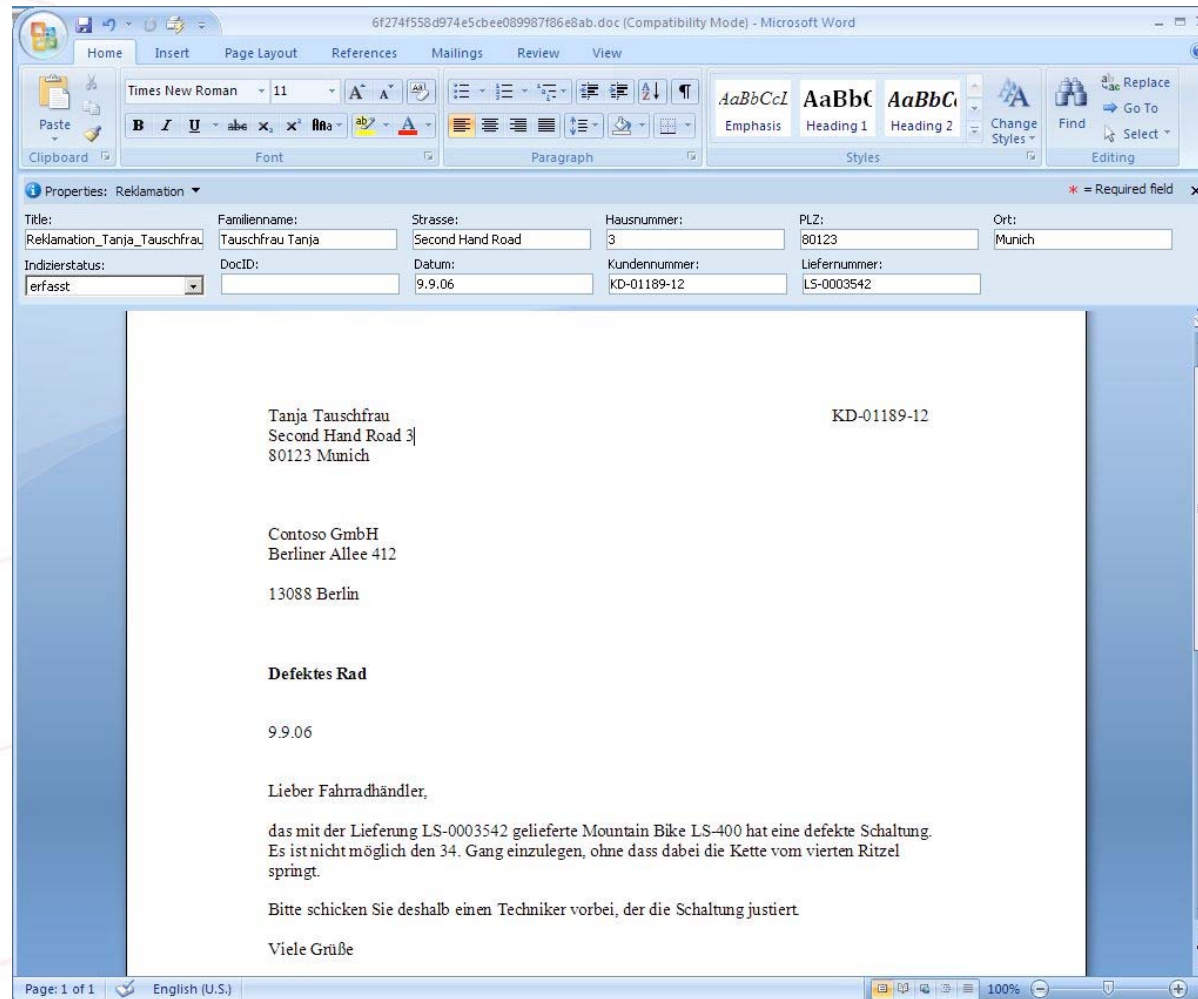
Add new document

InBox Korrektur

Type	Title	Edit	Modified	Modified By	Dokumentenklasse
There are no items to show in this view of the "Inbox" document library. To create a new item, click "New" or "Upload" above.					

Add new document

Software Services



Extension of Document Services into Application

The screenshot shows a web browser window titled "Homepage - STA1234567 - Microsoft Internet Explorer". The address bar shows the URL: `http://rgmoss/websites/aktenbestand/STA1234567/default.aspx`. The page content is organized into several sections:

- Navigation:** A top menu with "Datei", "Bearbeiten", "Ansicht", "Favoriten", and "Extras". A breadcrumb trail reads "APO Portal > RKS-Kundenakten".
- Page Header:** "STA1234567" with sub-navigators for "Homepage", "Akte_1234567", "Akte_0000001", "Akte_0987654", and "Sachbearbeiter".
- Left Sidebar:** A "Webseitehierarchie" (site hierarchy) with icons for "RKS-Dokumente", "RKS-Erfassung-InfoPat", "Aufgaben", "RKS Vorgang", and "RKS-Erfassung (Metadaten)". A "Papierkorb" (trash) icon is also visible.
- Main Content Area:**
 - RKS-Kundenakten > STA1234567**
 - RKS-Erfassung (Metadaten)**: A table with columns: Titel, Stammmnummer, Unterkonto, Arbeitsziffer, Dokumentenart, Dokumentlink, Register, Ordner, and Ur. It lists several entries under different registers:
 - Register : 0 A-Z Ablage (Filiale) (5)**
 - Register : 1 Schriftwechsel (5)**
 - Ordner : Bestehende Pfändungen (3)**

Titel	Stammmnummer	Unterkonto	Arbeitsziffer	Dokumentenart	Dokumentlink	Register	Ordner	Ur
1_a_Rückseite_Dokument_Pfändung	1234567	89	0	Pfändung	1_a_Rückseite_Dokument_Pfändung; 1_a_Vorderseite_Dokument_Pfändung	1	Schriftwechsel	Bestehende Pfändungen
1_b_Dokument_Pfändung	1234567	89	0	*** noch einzutragen! ***	1_b_Dokument_Pfändung	1	Schriftwechsel	Bestehende Pfändungen
1_c_Dokument_Pfändung	1234567	89	0	Pfändung	1_c_Dokument_Pfändung	1	Schriftwechsel	Bestehende Pfändungen
 - Ordner : Schriftverkehr (2)**
 - Register : 2 Protokolle (4)**
 - Register : 3 Kreditvereinbarungen (2)**
 - Register : 4 KWG § 18 (4)**
 - Register : 5 Allg. Unterlagen – Auskünfte (5)**
 - RKS-Dokumente**: A table with columns: Typ, Name, Bearbeiten, Geändert, Geändert von, and Titel.

Typ	Name	Bearbeiten	Geändert	Geändert von	Titel
	0_0_Microsoft Information Bridge Framework 1		22.08.2006 11:58	RGSOFT\Administrator	0_0_Information Bridge Framework 1
	0_a_Kundenauftrag-formlos		16.08.2006 15:34	RGSOFT\Administrator	0_a_Kundenauftrag-formlos
	0_b_Fremdbrief+Anmerkungen		16.08.2006 10:08	RGSOFT\Administrator	0_b_Fremdbrief+Anmerkungen
	0_c_Kundenanfrage-formlos		16.08.2006 10:09	RGSOFT\Administrator	0_c_Kundenanfrage-formlos
	0_d_Brief-apoBank		16.08.2006 10:09	RGSOFT\Administrator	0_d_Brief-apoBank

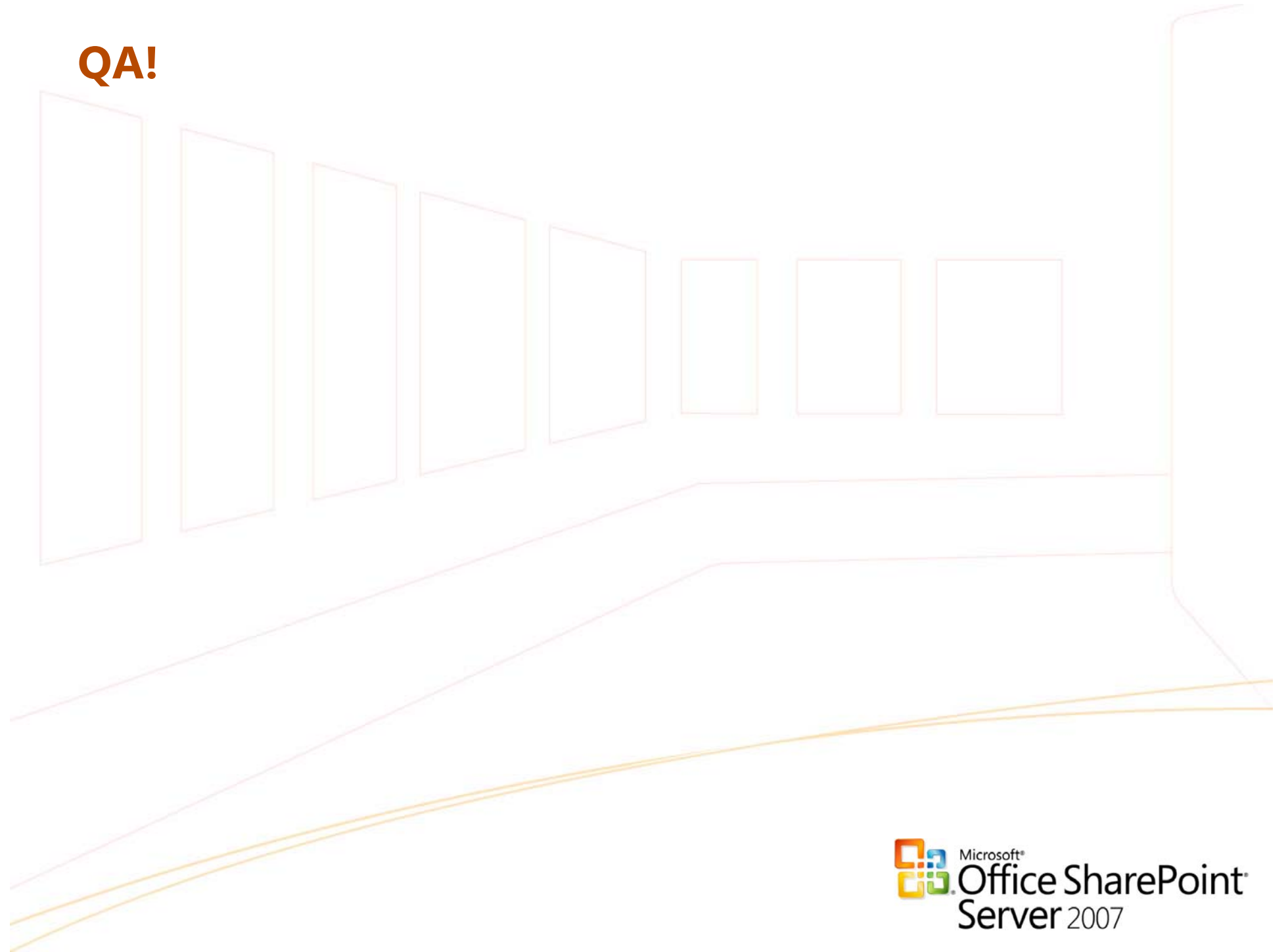
Challenges

- Create standard product
 - That is easily deploys
 - That is easily maintained for the individual implementation
- Hide complexity of Input Management Solution
- Rightsize information to recipient level
- Create functional compartments

Lessons learned

- Allow refactoring
- Understand and Maintain customer's requirements
- Avoid scope creep
 - Set project plan
 - Keep to project plan
 - Maintain and plan milestones

QA!



Sweepstake

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* English US version