repstor
inspiring ECM adoption

Maximize your Microsoft® investment to provide Case, Email & Document Management

custodian
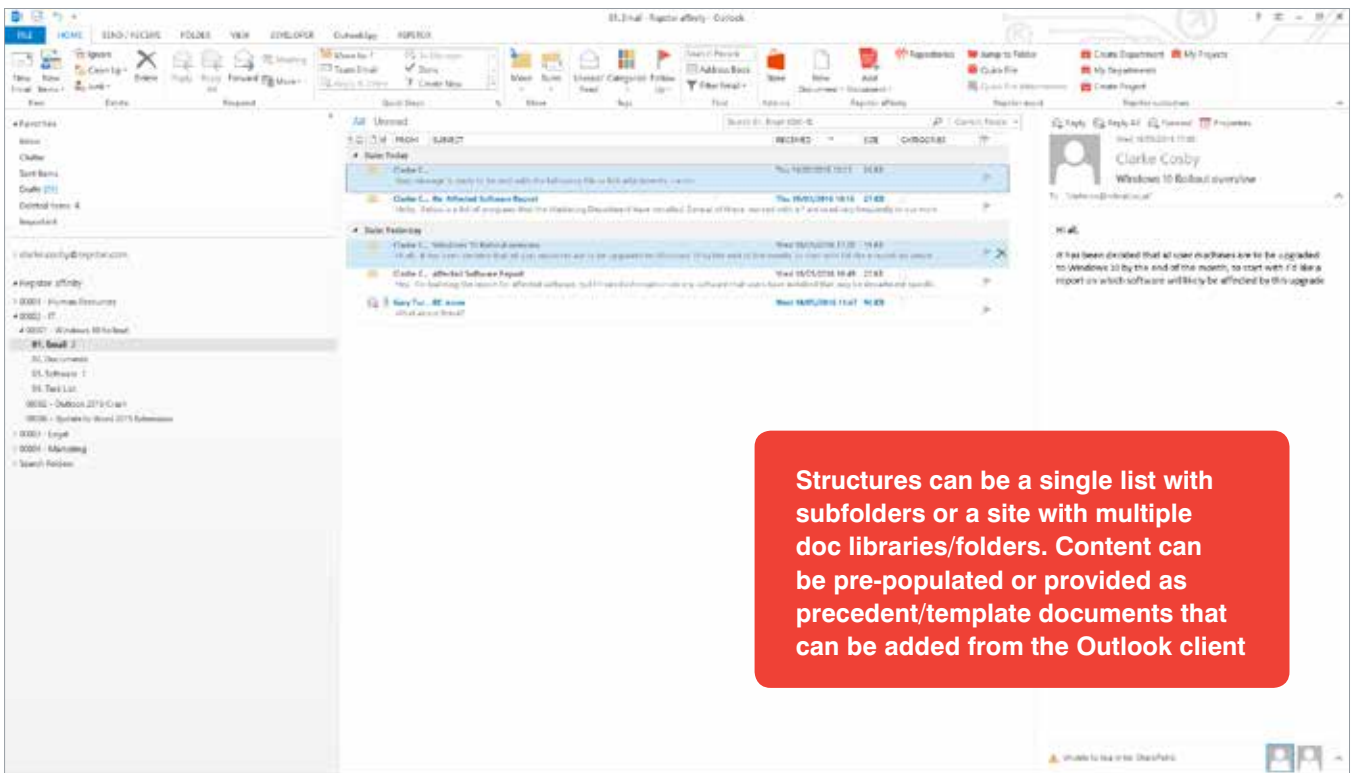the intuitive CASE manager for Office 365

Repstor custodian™ turns Microsoft® Office 365™ / SharePoint® into an effective case, email and document management system helping organizations to further capitalize on their Microsoft investment.

Custodian™ extends the powerful document management capabilities of Microsoft Office 365™ / SharePoint® to deliver case-centric collaboration, document and email management solutions to meet the many different departmental needs within enterprises such as HR, Legal, PMO, logistics, procurement and other lines of business.

Custodian utilizes the powerful and familiar interface of Microsoft Outlook® and other Office® applications to ensure the highest level of user-adoption and replace complex and costly legacy systems. Business analysts can quickly and easily configure solutions reflecting the needs of departments or enterprise wide applications.

Repstor custodian's deep integration with Outlook enables users to work on cases directly from Outlook/Office increasing productivity while maintaining compliance and security. Users can work on or offline and access content from the many different sources that may be required in addition to the case management system (e.g. File Shares/ EFS services/corporate records stores).

custodian enables organizations to take advantage of the broader Microsoft platform of products including capabilities such as analytics, compliance, workflow and Data Loss Prevention (DLP). Additionally, custodian has been developed to integrate seamlessly with other professional applications such as Practice Management Systems (PMS), HR Systems, on-boarding applications, client-engagement systems, time and billing applications, and other workflow management applications.

**Structures can be a single list with subfolders or a site with multiple doc libraries/folders. Content can be pre-populated or provided as precedent/template documents that can be added from the Outlook client**

▶ Figure 1 - Cases and Content within Outlook

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the intuitive CASE manager for Office 365

LIFE GUARD

Key Benefits

Powerful Case Management Functionality

Extending the capabilities of Microsoft Office 365 / SharePoint to provide a user friendly document-centric case management solution.

– Provides a highly performant, intuitive user experience for professionals.

– Rich Case Templating functionality to support different case types.

– Apply structure, property sets, security, document types and associated processes to cases.

– Automatically 'push out' cases to relevant parties and make them ccessible immediately through Outlook.

– Secure offline access to case content.

– Create different types of cases based on region, department, practice areas, project type, sensitivity etc.

– Apply security consistently across cases.

– Inherited metadata, security and retention policies means sensitive data is protected.

▶ Figure 2 - Create Case from Template

Maximizing your Microsoft Investment

Organizations can quickly and economically deploy case management solutions without the need for custom development.

– Works with SharePoint on-premise, Office 365 Cloud or Hybrid – there is nocustomization of the Office 365/SharePoint systems.

– Seamlessly integrates with Microsoft Outlook, Windows® Explorer and other Office Applications.

– Extends the capabilities of Microsoft Office 365 and SharePoint to provide case-centric collaboration, document and email management.

– Automatic creation of cases, workspace structures, metadata, and permissions using the custodian provisioning engine and API.

– Easy integration with other Microsoft applications, for example analytics to generate management reports.

– Minimizes the need for change management as Cases are surfaced through the familiar Outlook user interface.

Secure Email & Document Management

Email is the most utilized collaboration tool for professionals. Custodian enables users to manage case related emails and documents together, avoiding the issue of isolated email content and applying consistent structures for managing case based content.

– High performance Outlook integration.

– Case centric DMS functionality accessible through Outlook or SharePoint.

– One familiar search interface across all content (online and offline).

– Ensures that the correct metadata, security and other attributes are applied consistently.

– Provision of content to Outlook in a consistent structure to make it easy for users to find and file content.

– Full version management with comparison between versions.

– Assisted filing based on the content and context of the email/document being filed.

– Improves accuracy of filing for compliance and leverages SharePoint compliance features (Records Management/Legal Discovery/Digital Rights Management and others).

▶ Figure 3 - Intelligent Filing

Multi-Repository Support

custodian supports access to multiple repositories in parallel and integrates seamlessly with the most commonly used Office applications.

– From Outlook users can manage, file and access their email, cases and documents tomultiple repositories in parallel including SharePoint / Ofiice365, HP Records Manager® /TRIM, File Shares, Meridio® and Dropbox® as well as accessing external collaborative environments such as HighQ® collaborate, Box®.

– Secure collaboration with external parties.

– Users have a single view of cases.

– New item notifications in Outlook highlighting recent changes across all repositories.

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Microsoft Partner
Gold Collaboration and Content

Key Benefits

Easy Integration to Professional Applications

Repstor custodian has been developed to integrate seamlessly with other professional applications, avoiding the need for users to switch between applications. These include:

- CRM Systems
- Practice Management Systems (PMS)
- On-boarding applications
- Time and billing applications
- Document and Records Managemen
- Repositories
- Project Management applications
- Workflow Management
- Mobile Content Management
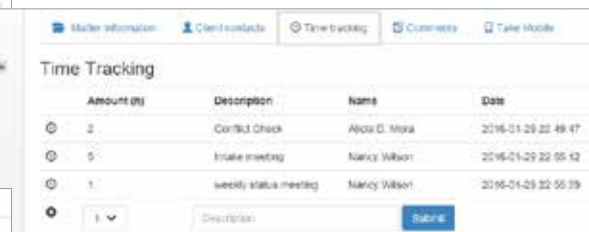
Example use cases:

- HR departments (Case Management)
- Legal departments (Matter and Case Management)
- Commercial departments
- Logistics Management
- Sales departments (Opportunity Management)
- PMO and IT (Project Document Management)
- Engagement Management in Professional Services

Summary of Product Features

✓ Exploits Office 365 or SharePoint On-Premise

✓ Maintains the Outlook way of working

✓ Document Templates that exploit case metadata to produce pre-filled standard

✓ Full offline working

✓ Automated Case IDs

✓ Flexible Naming and Logical Filing Structures

For a detailed list of product features please see:

www.repstor.com/custodian-features.