



DOCUMENT EXTRACTOR ENABLES BETTER DOCUMENT MANAGEMENT FOR UK'S GOVERNMENTAL ORGANIZATION

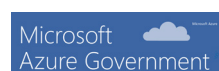


SUCCESS STORY

Chris Lynch IT Consulting



Gold DevOps
Gold Data Analytics
Gold Data Platform
Gold Application Development
Gold Windows and Devices





Partner

Chris Lynch IT Consulting



End Customer Activity

Governmental organization



Headquarters

UK



Products and Services

Document Extractor



“When we first found Document Extractor, we thought that if it did what it said on the tin, it would tick all our boxes. And it did: just basic configuration, and it worked first time!”

– Chris Lynch, Director of Chris Lynch IT Consulting

Not everyone can say they have 40 years of experience in the IT industry bringing solutions to both the private and public sectors. But Chris Lynch can!

He had been working for two years on a UK governmental agency project when a new challenge arose.

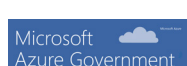
The Challenge - Getting Documents from Salesforce to SharePoint Automatically

“The Document Management Solution at the end customer was SharePoint.”, Chris Lynch explains. As the general strategic objective for UK government agencies is “cloud is first”, this is SharePoint Online. “It was all well-established.”, he concludes.

Nonetheless, the end-users were struggling because they also needed the documents in Salesforce. This was

a challenge because they wanted the documents there, but they wanted to keep using the SharePoint functionalities they were used to (SharePoint being the established Enterprise Document Management Solution there). As Chris Lynch puts it, “Salesforce, by their own definition, are not document management providers.”.

Many of the documents the government agency handles need to be kept for several years for legal reasons. The end-users had to have access to these documents in Salesforce, but without having to move all the documents there. At this point, Chris Lynch thought, “We need to find a solution that enables us to upload documents relating to the funding projects programs so we can hold it all on SharePoint”. That’s when the search for such a solution began.



The First Approach – Files Connect Didn't Cut It

The first thing they did was get Files Connect from Salesforce. After struggling a bit with its deployment, they were not happy when they finally tried it out. "We found you can't upload documents with it. For us that meant it was unusable, it was just not fit for purpose, given our requirements.", he points out.

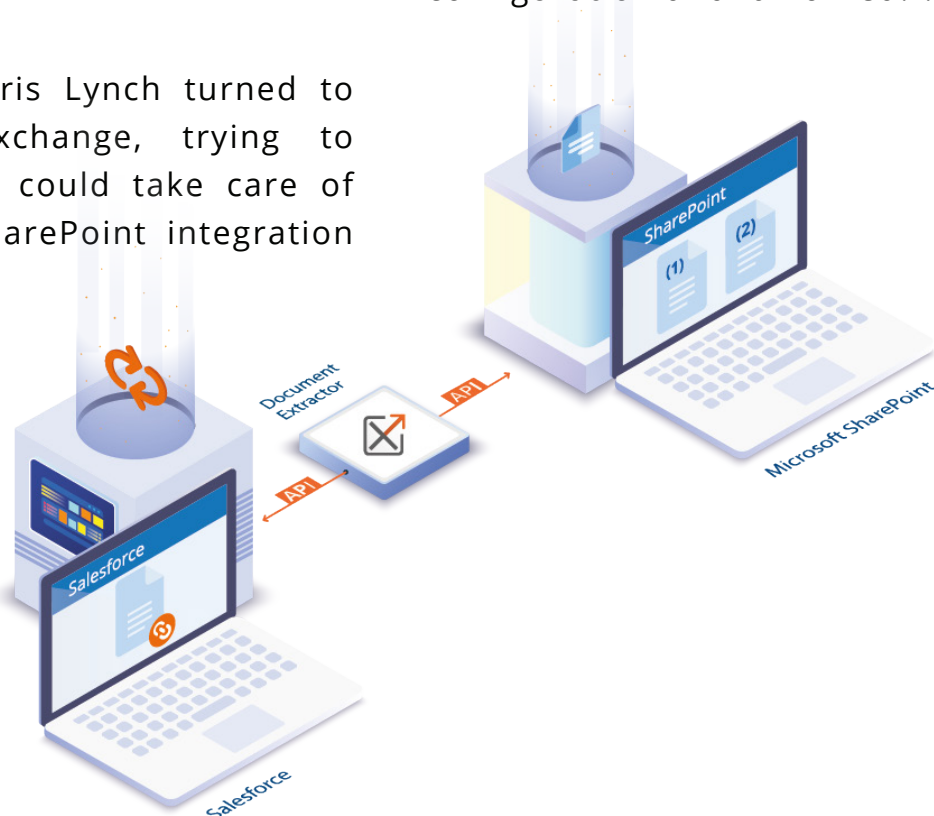
"With Files Connect, you've got the URL to the document in SharePoint. But Files Connect falls down because you cannot actually upload the document to SharePoint, it has to be there already.", he summarizes.

The Solution – Getting the Salesforce SharePoint Integration with Document Extractor

At this point, Chris Lynch turned to Salesforce AppExchange, trying to find an app that could take care of the Salesforce SharePoint integration

the way they wanted it. "When we first found Document Extractor, we thought that if it did what it said on the tin, it would tick all our boxes. And it did: just basic configuration, and it worked first time!" he notes.

Nonetheless, the first step was a Proof of Concept. This worked rather well and took a couple of weeks. From the Proof of Concept to the final deployment, it was a smooth process. All in all, it was a matter of having an out-of-the-box solution that met their Salesforce SharePoint integration requirements. "Document Extractor does what we need, and it works first time. It integrates well both with our backend and frontend portal. Job done!", and he then adds, "It was a Vanilla project" – no customizations or bespoke development – "just basic configuration and it worked."



The Details and the Future

Taking it all around, this project has a core of about 150 internal active users. This will potentially grow to double that number soon. Plus, many community users are also involved. Those come through a web portal the project implemented using FormTitan. Given that this government agency handles the documents for around 5000 funding programs per year, even though not all users will access the documents, the project still has a high number of community users, very easily over 2000.

The only remaining challenge is the upload of historical documents. "These programs can run for 10+ years, and whilst that is going, you keep all the records and documents. So, we are now developing a way of doing mass uploads for these documents so that Document Extractor can then have the links for them within Salesforce.", he explains. Chris Lynch IT Consulting is working on that together with Connecting Software. "Connecting Software's team has been very attentive throughout the whole process. In terms of how Connecting Software behaved as a supplier or as a potential supplier, it was all positive ticks in the box", he concludes.



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