MacroView

AEGIS Insurance Services: Getting to Success with SharePoint Document Management

Specialist insurance provider AEGIS moved its document management to a solution based on Microsoft SharePoint® and MacroView DMF®. In this case study we look at key aspects of the project and why AEGIS users, management and the IT Department all feel that the move was a success.

Background

Associated Electric & Gas Insurance Services Limited (AEGIS) began operations in 1975. Today AEGIS offers a full range of sophisticated insurance and risk management products and services to member companies of the utility and related energy industry. AEGIS offers its members general liability, directors and officers liability and property coverage. Headquartered in East Rutherford, NJ, AEGIS also has international capabilities through Syndicate 1225 at Lloyd's of London. Total user count is approximately 300.

In mid-2011 AEGIS started a project to replace an existing document management system with a solution based on SharePoint 2010. The objective for the project was to reduce IT operational costs by rationalizing onto the SharePoint platform.

The legacy system provided a number of features that were popular with users. One such feature was the ability to drag and drop to save emails and attachments while working in Microsoft Outlook®. Another was the ability to associate each document with a number of related Policies and Claims. The legacy system was also integrated with existing Line-of-Business systems and was managing a reasonably large volume of documents.

Finding the Right SharePoint Add-On

The project was led by Himanshu Pandya, Senior Manager, Office of the CIO, who states:

"From the outset we were conscious that a new SharePoint-based solution for document management would need to provide our users with an experience that was at least equivalent to that they were familiar with from the legacy system."

The Project Team identified numerous critical weaknesses with the OOB DM capabilities of SharePoint, so started looking for add-on software that would address these weaknesses. The first add-on that they installed fell well short, with the result that the project was in a critical state until they found MacroView DMF. Himanshu Pandya again:
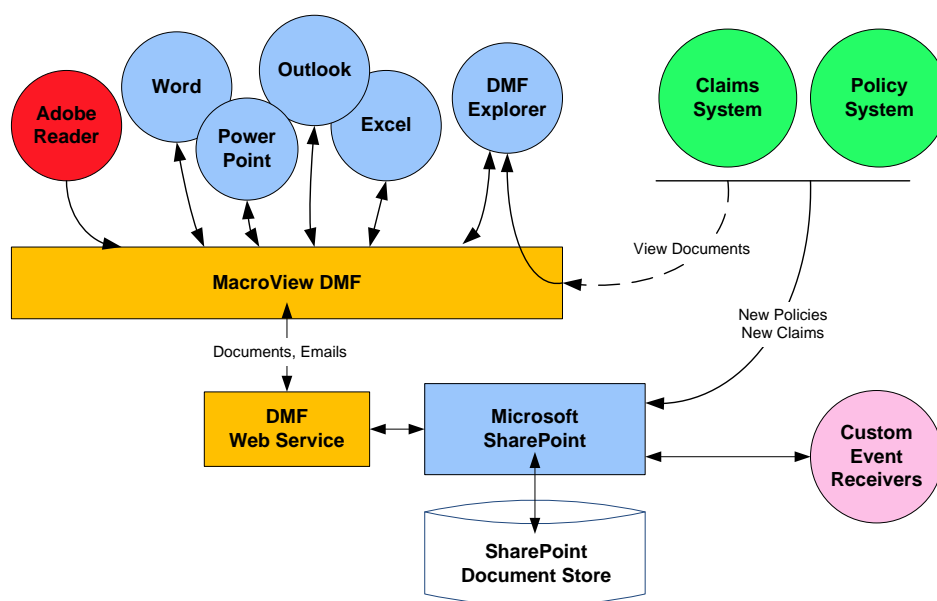
"We determined that MacroView DMF was the only SharePoint add-on that could provide the usability, functionality and volume handling that we required. In the end, by combining SharePoint with MacroView DMF and our own integrations we were able to provide our users with a number of additional features compared to the legacy system."

Advantages of MacroView DMF

Himanshu Pandya lists the following key value adds of MacroView DMF:

- **Drag and drop** – *"This is the Number One feature that business users look for, and still not well supported in OOB SharePoint, even SharePoint 2013."*

- **Navigation** – *"MacroView DMF enables easy, intuitive navigation of even a large SharePoint document environment, a task which users find almost impossible with the native SharePoint web browser UI."*

■ **Right-click options** – *"The rich right-click menu provided in MacroView DMF makes tasks such as sending a document as an attachment much simpler than when you are using SharePoint via its web browser UI."*

■ **Searching** – *"FAST™ Search is powerful, but the OOB interface is not appealing to a business user who needs to search by Policy Number or Claim Number. MacroView DMF enables the search UI we need, while still using FAST behind the scenes."*

■ **Pushed Favorites/Subscriptions** – *"The ability to automatically push a Policy folder that an Underwriter is managing to their MacroView Favorites is a key feature for our users. The same applies to our Claims Professionals."*

■ **Integration with Microsoft Office® and Adobe® PDF's** – *"Users now can directly save a document right from within Word / Excel / PowerPoint and also Adobe Reader into SharePoint via MacroView."*

Architecture of the new SharePoint-based DM solution

Design, Integration and Customization

AEGIS designed a site / library / folder structure that was broadly similar to the structure available in the legacy system. They built integration with the AEGIS *Next Generation* Policy and Claims administration systems so that corresponding sites, document libraries and folders were automatically provisioned in SharePoint as new Members, Policies and Claims were registered in those systems. AEGIS IT also worked closely with MacroView to develop a number of customizations to MacroView DMF software and to the SharePoint environment. These customizations included:

■ **Shadow Documents** – as a document was saved or deleted, Link-To-Document type entries were automatically created in the folders corresponding to related claims – thereby retaining a key feature of the legacy system for AEGIS users.

■ **Metadata-based security** – custom event receivers were used to set document-level permissions based on the value of metadata columns.

■ **Sticky Views** – MacroView DMF already remembered the library view that you used most recently in Microsoft Outlook. AEGIS had this extended to other applications.

Implementation and Migration

The SharePoint server farm installed to run the new document management environment had 24GB main memory, 8 CPUs and separate SQL Server and FAST server. Native FileStream Remote Blob Storage was configured so that almost all documents were stored on external file servers. For the users, AEGIS provisioned a virtual desktop that runs Microsoft Windows® XP and Microsoft Office 2010.
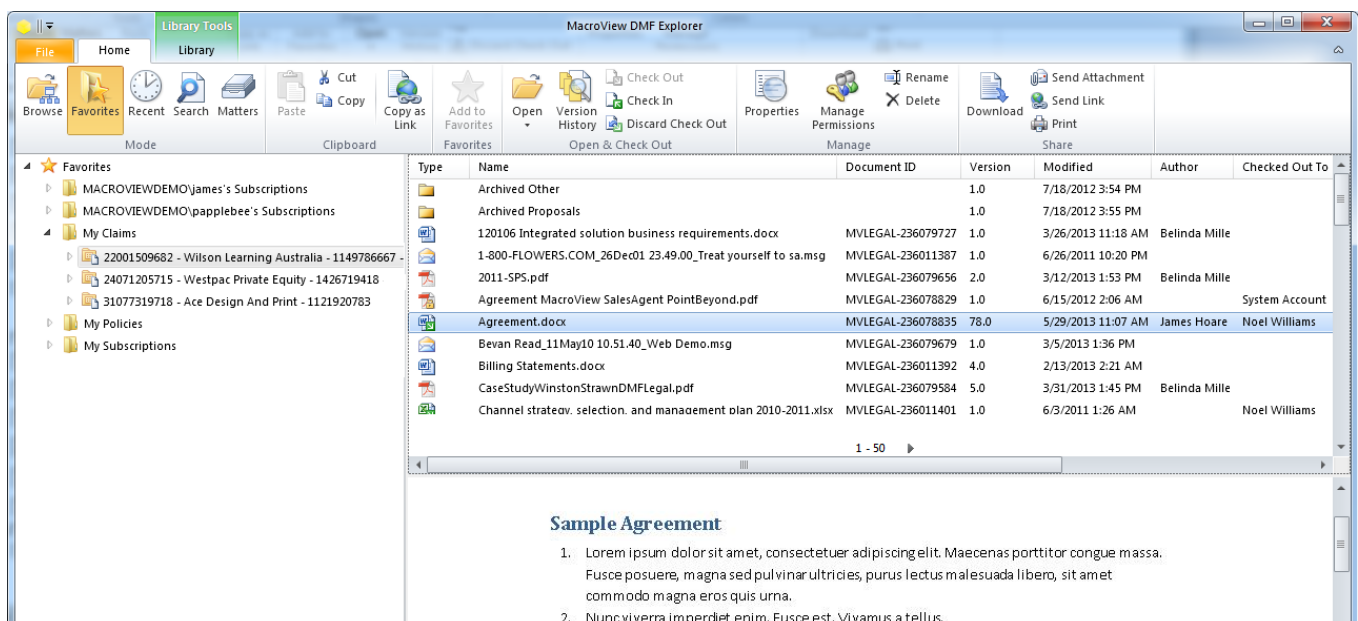
The migration was staged by department. AEGIS used a combination of third-party and in-house code to perform an initial bulk migration, followed by a period of parallel operation, with subsequent migration of deltas. In all, around 800GB of documents and metadata was migrated. A significant aspect of this migration was the mapping of the legacy system's metadata to the metadata supported by SharePoint. Folder-level defaults were used extensively to implement automatic metadata.

User Reaction – We Like the New SharePoint Way of Managing Documents

Reaction from AEGIS users to the new SharePoint + MacroView DMF document management solution has been positive. The new solution continues to provide the DM functionality and security features that they relied on in the previous DM environment. Importantly, the new SharePoint-based solution has good performance – on average less than two seconds to perform a search or to save a document. And thanks to MacroView DMF the business users can still save, search for and retrieve documents and emails while they work in familiar applications such as Outlook, Word and Excel.

Users particularly like the **Favorites** feature of MacroView DMF. This enables one-click navigation to frequently-used areas of the SharePoint environment. For example, a user can drag and drop to a Favorite folder to save emails or attachments for a Policy or Claim that they are administering. AEGIS commissioned MacroView to configure the **Push Favorites** mechanism of MacroView DMF, which automatically creates Favorites for each user, based on the Policies and Claims that they (or their selected colleagues) are associated with in the line-of-business Policy and Claims administration systems.

Another popular aspect of the new solution is the way a user can click on a hyperlink in the Claims system and be jumped into MacroView DMF, located on the document library corresponding to the Claim. They can then drag and drop to that library to save emails and attachments from Outlook, or to upload files from any Windows folder.
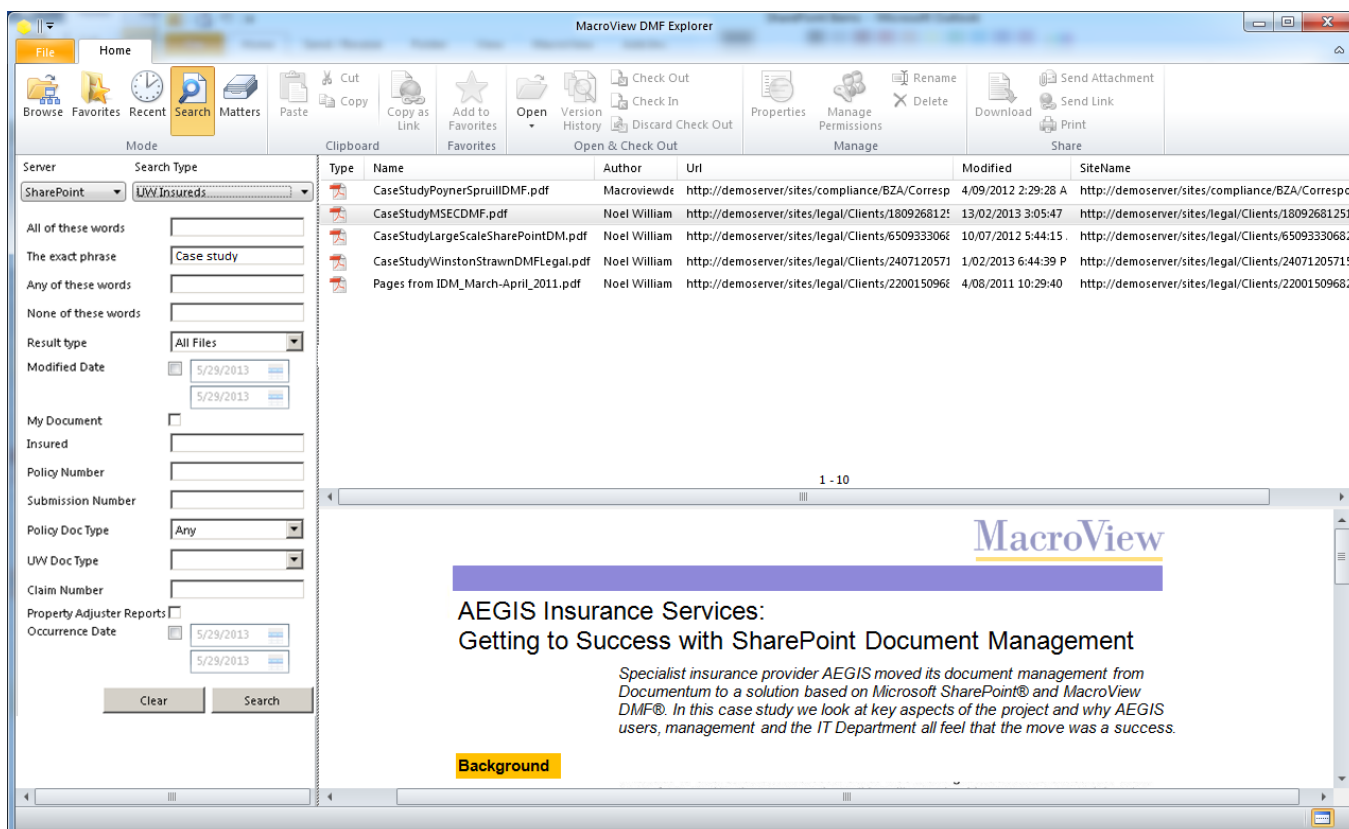

MacroView DMF Explorer running in *Favorites* mode. Note groups for *My Claims* and *My Policies.*

Management Perspective – Successful Project

From the perspective of AEGIS Management, the move to SharePoint-based document management has been a real success. The project enabled the retirement of an old platform and reduced the number of applications, which provided a major saving in terms of software license fees and operational costs.

In addition, the staged migration to the new DM facilities went smoothly – there was minimal disruption to ongoing business operations. The way the new solution maintained functionality and provided a broadly similar look and feel were vital in this regard, because they minimized the amount of user re-training that was required.

Best of all, the project to move DM to SharePoint was completed on-schedule and ahead of budget.

Searching in MacroView DMF Explorer using custom AEGIS *Underwriting Search* panel.
Note formatted preview of selected search result.

The View from IT – Many Challenges Overcome to Achieve a Good Result

AEGIS IT is also pleased with the way the new SharePoint-based document management solution is running. The move to SharePoint has made document management available to a much broader range of users within AEGIS. Where previously DM was rolled out to only a handful of divisions, it is now being used by a number of additional divisions. As Himanshu Pandya notes:

"While there are plenty of challenges associated with using SharePoint for serious-scale document management, our experience shows that with the right add-on software like MacroView DMF you certainly can achieve a very satisfactory result."

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