Workflow throughout the Enterprise for Legal Firms and Departments

The Webcast will begin at 1:00pm EST

www.Gig-Werks.com
Today’s Presentation:

• Introduction & About Gig Werks
• Gig Werks Experience with SharePoint and Legal
• SharePoint and Workflow
• About K2
• Demonstration
  • Workflow throughout the Enterprise for Legal Firms and Departments
• Q&A and Survey
  • When leaving the webcast you will be prompted with a survey, please fill out for access to the PowerPoint and Webcast Recording

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SharePoint Quick Start Offers

- SharePoint Planning
- SharePoint Advisory Services
- SharePoint Staging & Development Workshop
- SharePoint & Business Intelligence
- Power BI & Office 365
- SharePoint & Branding
- SharePoint & Line of Business Integration

Upcoming SharePoint Webcasts & Events

- Webcast – Wednesday, 09/03
  SharePoint 2013 vs. SharePoint Online: Workflow

- Webcast – Thursday, 09/04
  Power BI for SharePoint Online & Office 365

- Webcast – Friday, 09/05
  SharePoint 2013 vs. SharePoint Online: Search

- Webcast – Tuesday, 09/30
  Project Management Workflow in SharePoint

- Webcast – Wednesday, 10/01
  SharePoint 2013 vs. SharePoint Online: ECM

- Webcast – Thursday, 10/02
  SharePoint 2013 vs. SharePoint Online: Business Intelligence

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About Gig Werks

- **Company began and has been a Microsoft Gold Partner since 2002**
- **Deep relationship with Microsoft**
  - Virtual Technology Specialists for the Microsoft New York Enterprise Group
  - Various other Microsoft Awards and Tech Forum Award Winner 2008
  - Invited into the Partner Evidence Program for SharePoint 2007, 2010 & 2013
- **Market Focus**
  - From 100 seats to 150,000+ with clients across North America
- **Have focused on SharePoint since 2003**
- **Deep Industry Experience in:** Legal, Healthcare/Pharma, Financial Services, AEC & Professional Services
- **Expertise around Full Capabilities of SharePoint, Business Intelligence, Office 365 and Microsoft Stack**
- **Uniquely partner and offer expertise on the Best SharePoint ISV’s in the channel**

www.Gig-Werks.com
Gig Werks Legal Solution Expertise Includes:

- Unified Search Throughout Enterprise
- Secure File Transfer
- Document Comparison
- Reline, Redact & Markup Content
- Document Management
- e-Discovery
- Records Management
- Reporting & Business Intelligence
- Enterprise Workflow
- Intelligent Content Generation
- Compliance & Security
- Line of Business Integration

Legal Firms and Department Customers across North America

www.Gig-Werks.com
Microsoft SharePoint
The Business Collaboration Platform for the Enterprise and the Web

- Connect and Empower People
- Cut Costs with a Unified Infrastructure
- Rapidly Respond to Business Needs
Workflow in SharePoint

• Every Business has Processes
• Workflows help...
  • Automate and Manage Business Processes
  • Ensure Processes are Consistent and Repeatable
• SharePoint bridges the gap between knowledge and toolset
• Interacts with existing SharePoint technologies
  • Lists and Libraries (including External Lists)
  • Tasks
  • Email
  • InfoPath

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Architectural Changes in SharePoint 2013 Workflow

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**OOTB Predefined Workflows**

- Predefined
- Just fill in the blanks
- Most used within SharePoint
- Can be defined in the browser

**Types of OOTB Predefined Workflows**

- Collect Feedback
- Approval
- Disposition Approval
- Collect Signatures
- Three-States
- Publishing

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What’s New in SharePoint Designer 2013

• Ability to create workflow based off the new .Net 4.x Workflow Infrastructure
  • While at the same time still able to create and edit the old SharePoint 2010 Workflows

• Tight integration with Stages
  • Workflows no longer have to be serial
  • All 2013 Workflows are now state-based, and you can have your workflow jump to any stage you want, even to a previous stage

• The new Visual Designer
  • A brand new design surface that integrates the Visio canvas right inside SharePoint Designer
  • You can create workflows using click and drag
  • You can even set the properties of every action right within the Visual Designer. No need to jump back to the Text-Based Designer if you do not wish to

• Copy and Paste
  • You can now Copy, Cut, and Paste within the Text-Based Designer

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What’s New in SharePoint Designer 2013

• **Loops**
  • Loops are now a fully integrated action which you can use within all 2013 Workflows

• **Call Web Service Action**
  • You can now call Rest/HTTP web services right from within SharePoint 2013 workflows

• **Start Workflow Actions**
  • We now have an action that lets you spawn up old 2010 workflows right from within a 2013 workflow.
  • You can use this action to take advantage of any 2010 workflow functionality (e.g. your old custom actions)

• **Packaging**
  • You can now package individual workflows straight from within SPD

• **Dictionary Type Variables**
  • You can now create variables that can hold an array of values
  • Combining this with the new Loop action opens up a whole host of new scenario
About K2

K2 provides software products that enable businesses to rapidly compose, configure and deploy process centric application that solve previously expensive or impossible problems

- Started as a product company in 2001
- > 2500 customers in over 80 countries
- > 450 solution delivery partners globally
- Over 20000 community members
- Tier 1 Managed Microsoft Partner
- SAP Certified partner
- Highest growth of any Workflow/BPM vendor - Gartner and IDC - 2013

www.Gig-Werks.com
K2 software automates business processes to maximize efficiency, consistency, compliance and visibility at legal firms and organizations all over the world.

K2 for Legal Provides Solutions for

• Workflow Through Disparate Systems
• Case Management
• Client Billing
• Conflicts Processing
• Contract Management
• Data, Document and Image Management

• eDiscovery
• IP Portfolio Management
• Legal Process Management
• New-Matter Intake
• Time Reporting

www.Gig-Werks.com
Legal professionals face a heightened need for efficiency, but a decreasing ability
to manage workflow across internal and corporate client systems due to dated
CMS systems and a lack of system integration, resulting in the duplication of data
entry across multiple systems.

K2 Workflow Provides:
• A Flexible and scalable solution that allows processes to be easily changed or expanded as the needs of the business change.
• A great user interface and visual, no-code design tools that make the business apps easy to assemble and easy to use.
• Powerful workflows that span cloud and on-premises systems, and integration with many line-of-business and legacy systems make it easy to access legal information, wherever it might live, and deliver it into the hands of those that need it.
INTRODUCING K2 PRESENTER:

Mark McGovern
Technical Partner Account Manager, K2
MCTS – SharePoint ECM, CTT+
mark.mcgovern@K2.com
linkedin.com/in/markrmcGovern
Twitter: @mark__mcgovern
FIRMS TAKING ADVANTAGE OF THESE TRENDS
DATA
One truth. Multiple sources.

WORKFLOW
Deliver outcomes.

FORMS
Faster Forms. More Control.

REPORTS
Visibility matters.
One Truth Multiple Sources

![SmartObject Designer (Customers) > Define Properties](image)

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<th>Description</th>
<th>Type</th>
<th>Key</th>
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Faster Forms. More Control.

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Total: 300
LEVERAGE EXISTING DATA

With our proven SmartObject framework, tie together information from multiple line-of-business systems in a single form. Out of the box, K2 SmartForms supports SharePoint, Dynamics CRM, SQL Server, Oracle, SAP, Salesforce.com or your own.
CONTROLS
Deliver outcomes.
Flexible and adaptable business process
MOBILE CLIENTS

- IPHONE
- BLACKBERRY
- ANDROID
Visibility matters.
OOB REPORTS
LIVE DEMO

Workflow throughout the Enterprise for Legal Firms and Departments
Q & A

Go to the Question Tab on your GoToWebinar Control Panel and Type Your Questions to be Answered

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