



Global Product and Services Provider Expands Business Opportunities with OBA

Overview

Country or Region: Australia
Industry: Software – Records Management Systems

Partner Profile

i5 Software is a subsidiary of the global software company the OBS Group, an experienced software developer in Australia. i5 Software markets a records management solution built using Office Business Application (OBA) components.

Business Situation

i5 Software recognized an opportunity to provide SharePoint customers with a robust records management framework and affordable alternative to stand-alone records management systems for organizational compliance with continually changing government regulations.

Solution

In response to customer demand, i5 Software developed i5 Records Management for SharePoint, a solution integrated with Microsoft® Office SharePoint® Server 2007 and the 2007 Microsoft® Office System.

Benefits

- Enhance sales
- Grow addressable market
- Reduce customer costs by 50%

“i5 Software enables SharePoint to deliver Records Management for Everyone.”

Desmond Russell, General Manager, i5 Software

i5 Software, based in Australia is a software development firm that markets a records compliance and management solution. The solution, called i5 Software, Records Management for SharePoint, is based entirely on Microsoft® Office SharePoint® Server 2007. Because i5 Software is built using SharePoint technology, the system can be quickly and inexpensively deployed on existing SharePoint Server 2007 installations, immediately providing organizations with a secure and efficient way to manage their electronic and physical records. According to management at i5 Software, the solution is able to generate a 50 percent reduction in total cost of ownership for i5 Software customers. Additionally, by leveraging Microsoft SharePoint technology as a development platform, i5 Software was able to reduce its time to market by 40 percent and its software development investment by nearly 50 percent.



Situation

The regulatory environment in Australia, as in other nations, is complex and dynamic. Organizations must maintain a system to manage records that not only meets the needs of the business, but is also compliant with current legislative requirements and is adaptable to future legislation changes.

Many organizations rely on stand-alone electronic document and records management systems (eDRMS) that are expensive to purchase, operate, and maintain. These eDRMS solutions are typically built using proprietary databases and user interfaces, and have little or no integration with the software packages that generate most electronic records, such as the 2007 Microsoft® Office system. In the midst of the global economic downturn, organizations are seeking less expensive eDRMS alternatives that require little or no extra IT support.

The founding members of i5 Software recognized an opportunity to fill an important market need for an eDRMS solution that is compliant, inexpensive and easy to manage and easy to use.

Solution

Soon after the release of Microsoft Office SharePoint Server 2007, OBS a systems integrator and software developer with deep SharePoint development experience and an extensive background and domains skills in records management, announced the creation of i5 Software. The goal of i5 Software was to develop a packaged software application around a recurring customer request for SharePoint Server 2007 based eDRMS solutions.

Frequently, organizations with existing SharePoint Server 2007 deployments sought to extend the capabilities of the SharePoint

technology to create custom eDRMS solutions that worked the way their businesses worked, rather than purchasing expensive third-party eDRMS applications. In addition to reduced software license costs, the custom SharePoint based eDRMS alternatives are easier and less expensive to deploy, manage, and use.

i5 Software was released in 2008 and is a combination of SharePoint components and plug-ins for the 2007 Microsoft Office system clients that work together to manage the complete record lifecycle, from creation to disposal.

i5 Software provides multiple templates for different record and file types that automatically apply metadata, rather than requiring the end-user to manually input metadata within records. This approach ensures that metadata rules are systematically applied across the organization, and enables consistent and transparent management of records throughout their life cycle. i5 Software also includes capabilities to capture and classify physical records using an integrated barcode scanning system.

Once records have been classified and stored within the system, i5 Software leverages the document management and workflow capabilities of SharePoint Server 2007 to centrally manage records over their lifespan. Managers use a SharePoint Server 2007 web interface to manage records, review performance dashboards, and manage records management workflows. The automated workflow components of the i5 solution uses an extensible SharePoint based workflow design and management tool that allows managers and information workers from across the organization to streamline common records management processes, including requests for additional information from document creators,

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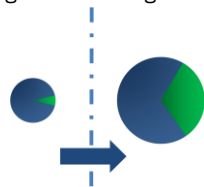
escalation and approval processes, and record retention and disposal processes. Close integration between i5 Software and Microsoft® Office Outlook® 2007 enables seamless communication between stakeholders participating in automated workflows.

Benefits

By adopting an Office Business Application (OBA) product development strategy, i5 Software was able to capture market share in Australia while dramatically reducing its product development investment and time to market.

Expanding Business Opportunities

By aligning their product with Microsoft technologies, i5 Software has been able to generate a great deal of demand among customers with existing SharePoint Server 2007 and the 2007 Office system deployments. As a result, i5 Software expects to grow sales of its eDRMS solution by 30 to 40 percent over the next three years. A large portion of that growth is expected to come from small to mid-sized public sector organizations in Australia. “Smaller government organizations have limited



resources and limited staff,” says Desmond Russell, General Manager at i5 Software. “We’re seeing a lot of

demand for i5 Software from this market segment. We already have around US \$500,000 worth of deals lined up for this year.”

In addition to their target market, i5 Software plans to aggressively pursue opportunities in other markets and geographies as well. “In the United States—the biggest SharePoint market worldwide—we are beginning to target customers who have already made the

investment in the 2007 Microsoft Office system and SharePoint Server 2007,” says Russell. “We expect demand from small to midsize businesses in the private sector, as well as from local municipal government organizations in the United States. Sarbanes Oxley, eDiscovery, and a number of other regulatory initiatives in the US have created a lot of potential demand for our solution.”

Better Meeting Customer Requirements

According to Russell, i5 Software’s product competes on cost and product differentiation simultaneously—because the i5 eDRMS solution leverages a customer’s existing SharePoint Server 2007 investment, i5 Software is able to undercut competitors on cost while delivering a mature, Enterprise ready feature set. “We are a ‘destabilizer,’” says Russell. “Because of our OBA strategy, we can offer a better eDRMS solution for half of the cost of our competition.”

Management at i5 Software has adopted a total cost of ownership (TCO) approach to formulating their customer value proposition, beginning with license fees. “Our competitors charge large license fees on top of what the organization



has already invested in SharePoint

licenses. With our solution, customers end up spending only a quarter of the license cost for a better SharePoint based records management product.”

Once i5 Software is deployed on a customer’s IT infrastructure, the customer enjoys additional savings from reduced employee training and support costs. “Training and support are areas where our customers save a great deal of money over competing products,” says Russell. “Because we heavily leverage SharePoint Server and the Microsoft Office system, we’re already operating in a

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user environment that end-users are familiar with, and we use technology that the IT staff are already comfortable with and can easily support. The net effect is a 40 percent reduction in training and support costs for our customers.”

Change management is another TCO component where i5 Software customers experience large savings. “Change management is typically a costly endeavor for competing products that sit outside of end-users’ everyday productivity tools,” says Russell. “They typically require an organization to hire a consultant to come in and modify their software. Our approach to change management is user-driven and user-customizable, just like SharePoint Server itself.”

Finally, i5 Software emphasizes productivity improvements as a result of high user adoption rates. “To the user, there’s no difference between using the i5 eDRMS solution and using SharePoint Server 2007 or the 2007 Office system. Since we use a familiar user environment, more users will actually use the tools that we provide across an organization. Extending adoption of the solution beyond eDRMS specialists to regular information workers amplifies the productivity benefits of the system. That’s why we say we offer ‘Records Management for Everyone.’”

Leveraging the Microsoft R&D Effort

During development of the i5 Records Management System, the development team



at i5 Software heavily leveraged existing 2007 Microsoft Office system and SharePoint Server 2007 technologies. Of the array of enabling

technologies developed by Microsoft and incorporated into the i5 Software OBA solution, perhaps the most important are the SharePoint Web Parts, SharePoint Document

Libraries, Windows Workflow Foundation, and the Open XML document file format.

SharePoint technologies provided i5 Software with the means to quickly develop both the front end and back end of their product offering. “SharePoint gave us a solid development platform out of the box. We didn’t have to build a management console, a security model, or user interfaces—it was largely there already” says Russell. “SharePoint allowed us to focus on the capabilities and differentiators of our product, and gave us a 30 to 40 percent head start in terms of the development cycle.”

The i5 Software user interface was built using custom Web Parts that provide access to all of the central records management and administration components. The solution also features reporting dashboards and a toolkit for extending the functionality of the system with additional workflows and management tasks. SharePoint document libraries make up a large portion of the backbone of the product and handle document retention and security. The i5 Software workflow toolset built on Windows Workflow Foundation gives i5 Software the ability to automate records management processes and provides managers with a real-time view of the status of each process related to records management.

The Open XML file format—the format for all 2007 Microsoft Office system documents—allowed i5 Software developers to easily extract metadata from each document within the eDRMS solution. The i5 Software uses this metadata to determine when records expire, and to identify the owner of the record to document destruction processes.

For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: www.microsoft.com

For more information about i5 Software products and services, call +61 7 3333 7600 or visit the Web site at: www.i5-software.com

Leveraging the Microsoft Partner Program

The company is currently teaming up with large solution partners in Australia, and has identified a partner base in the United States for its anticipated move into the global marketplace. “We’re working with some big names in Australia,” says Russell. “And we’re working with a number of Microsoft-focused partners in the US to explore opportunities in that market. We target partners that are Microsoft oriented and understand the value of the Microsoft solution stack.”



The company has received a great deal of support from local Microsoft field representatives in Australia as well. “We’ve worked very closely with Microsoft technical solutions and sales solutions professionals in Australia to promote our solution,” says Russell. “We’ve also had considerable support from industry practice managers, especially from the public sector practice, and we’ve begun to focus our local partnership with Microsoft within the Information Worker team. There’s a lot of opportunity for an ISV like us to get support from Microsoft.”

Microsoft Office System

The Microsoft Office system is the business world’s chosen environment for information work, providing the programs, servers, and services that help you succeed by transforming information into impact.

For more information about the Microsoft Office system, go to: www.microsoft.com/office

Software and Services

■ Products

– Microsoft Office 2007