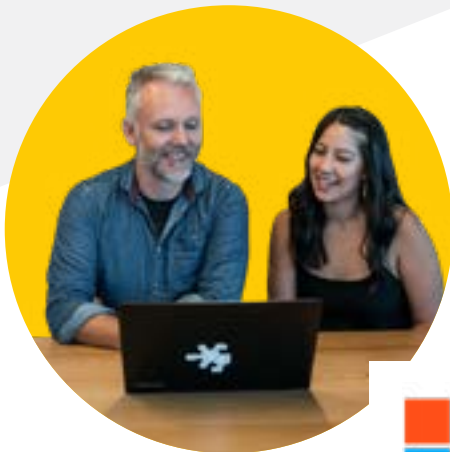




Is SharePoint right for your accounting practice?



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SharePoint considerations

Accountants and Excel go together like Bill Gates and billions. But what about another Microsoft offering – SharePoint?

If you're thinking about moving to SharePoint, here's what's to consider:

- 1 The differences between OneDrive, OneDrive for Business, and SharePoint
- 2 SharePoint governance
- 3 How SuiteFiles builds on top of SharePoint



The differences between OneDrive, OneDrive for Business & SharePoint

We talk to people every day about the virtues of Office 365 and SharePoint. We've been working with SharePoint for years, both as end users and as developers. Over that time, one of the most common questions we get about Office 365 is what're the differences between OneDrive, OneDrive for Business, and SharePoint? A close second is why would I use one over the other, or can I use more than one?

It's fair to say that the file management options you have in Office 365 can be confusing. We'll do our best to explain the differences between OneDrive, OneDrive for Business, and SharePoint, and who each option is best suited for.

What's Office 365?

There're a lot of misconceptions about Office 365, but at its core, it's a collection of cloud-based apps and services that Microsoft have bundled together for individuals and businesses. There're different bundles, or plans, that you can choose from, each supplying varying apps and services that best suit what you need, all paid for through a monthly subscription.

What's OneDrive / OneDrive for Business / SharePoint?

OneDrive is a cloud-based consumer product that you can use for your personal file storage needs. OneDrive for Business and SharePoint are cloud-based file storage options in Office 365. Each of them gives you the ability to store, exchange and revise files.

OneDrive

OneDrive is a personal cloud space for you to securely store your folders and files with the ability to access them from any device, from anywhere. The free plan gives you 5GB of free storage. For a small cost, you can purchase additional storage space and services, including the Microsoft Office suite and features like expiring links, scanning, and offline access.

OneDrive is essentially a direct competitor for Dropbox and is great for accessing your files and photos from multiple devices.

There are three ways to access OneDrive:

- 1 The web app through onedrive.com
- 2 The mobile app
- 3 The desktop app that sits in Windows Explorer (on PC), allowing you to sync your files in OneDrive with your computer

From the OneDrive dashboard in onedrive.com, you can also quickly access your calendar, contacts, and emails.

Who should use OneDrive?

OneDrive is for individual, personal use, most likely home users.

Can you share files?

Yes, you can. OneDrive is designed to be a repository for your information and you can give people access to your files when you want to.

OneDrive for Business

Here's where it gets a bit confusing. Despite having similar names, OneDrive and OneDrive for Business are very different to each other, at least technically speaking. OneDrive is for personal, home use and functions similarly to Dropbox. Whereas OneDrive for Business is part of SharePoint Online and Office 365, a cloud-based collaboration platform for organisations.

OneDrive for Business is a personal storage location for individuals within an organization to store files in that organization's Office 365 account. It's built into SharePoint in a special area called a 'My Site' and is locked down for each individual. This means you must share files to give others access to them.

You can access OneDrive for Business through a web and mobile app. There's also a desktop app to sync your files from Office 365 to your desktop.

Who should use OneDrive for Business?

Individuals within a business or organization. You can get OneDrive for Business stand-alone or with SharePoint and an Office 365 license.

Can you share files?

Yes, you can. Other employees or team members won't have access to your files in your OneDrive for Business. So, just like OneDrive, you'll have to share them with others.

What else should I know?

There's a limit to the number of files that you can sync to your desktop.

Remember that the sync limit is not the same as the storage capacity for OneDrive for Business.

SharePoint

SharePoint Online is one of the key components in an Office 365 subscription. It's an awesome collaboration platform that provides businesses with a huge variety of options to help them be productive, including a range of document libraries, task lists, calendars, dashboards, intranets, workflows, and wikis. It can be customized heavily to suit individual organizations. It's this flexibility to build whatever's required that's a great strength, but also a weakness, particularly for businesses with under 500 team members. Customizations can be time-consuming, complicated, and expensive since you need to employ someone to build it for you. We don't recommend doing it yourself unless you have adequate experience.

It's possible to use SharePoint straight out-of-the-box, but team members who aren't tech-savvy may find it difficult to navigate.

Who should use SharePoint Online?

Practices who want to be able to access their files from any device, at any time, and who want to build their own productivity systems. Generally, SharePoint is best suited to practices who have the time and money to invest in the platform.

Can you share files?

Yes. You can have OneDrive for Business for each team member, who can share files from their individual repositories, or you can create Team Sites, which all team members can access unless they've been specifically locked out.

Can I sync my desktop to SharePoint?

Yes, you can. The OneDrive for Business desktop app will allow you to sync files to a SharePoint Online Team Site. However, it's still constrained with the maximum number of files it can sync.

Given that it's a business file system, you will likely have tens or hundreds of thousands of files in here, and you probably don't want your team syncing all of these to their desktops.

SuiteFiles

SuiteFiles is a powerful – yet simple – cloud-based document management app built on top of SharePoint Online. It essentially acts as a customized SharePoint interface that we designed for teams of 10 to 500 accountants with the comprehensive features and functionality they need to grow along with their clients.

By being built on SharePoint Online, all your files in SuiteFiles are stored in a Team Site, so that they're available to everyone. You can adjust permissions for files and folders to only give team members access to what they need.

SuiteFiles acts as your accounting practice's central file system and is available through a monthly subscription (separate to your Office 365 plan). It allows you to ditch the server and move your files to the cloud in a quick, complete migration. Being cloud-based means that SuiteFiles is always up-to-date. Any changes and enhancements to the app are automatically available to everyone immediately.

Who should use SuiteFiles?

Accounting practices that want the security and ease of having their files in SharePoint, but don't want the work required to customize SharePoint from scratch. We've configured SharePoint's standard document storage so you can pull in your own client data via our integrations, have document generation and approval workflows, and offer an optimized client experience.

Can you share files?

Yes, you can easily share files from SuiteFiles with internal and external contacts.

To see this in action, take up our **free trial** offer. You can get a trial of Microsoft 365 Business including SharePoint at the same time.

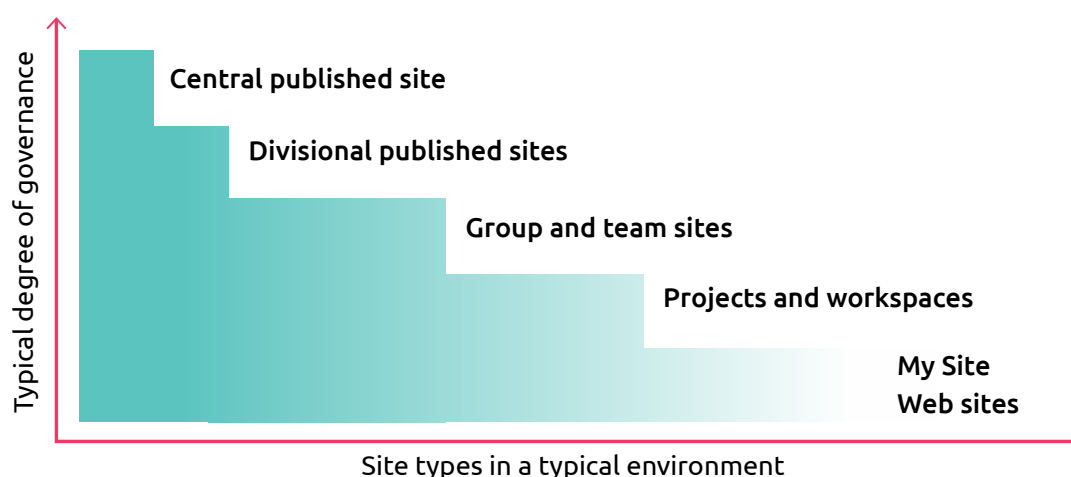


SharePoint Governance

Assuming you choose SharePoint, when deploying, there will probably be a huge focus on the project itself. Particularly the stages that must be completed to deploy the system – planning, analysis, design, build, and testing. Plus, all the tasks that make up these activities. There’s also a great build-up of expectations from stakeholders around outcomes that’ll be achieved and a general expectation that their lives will be made easier in some way.

Analysis

The analysis phase of the project identifies the business needs that the intranet or document management system (DMS) is going to address, and the SharePoint features that will support these. What many practices lose sight of though is that the operative word here’s “support”.



There’s always an underlying excitement when a practice is undertaking a project that’ll result in a new system. Who doesn’t like getting new stuff? If SharePoint is the answer to a long-standing or onerous problem, then it can almost feel as though your management team is giving you a present! However, by themselves, systems don’t solve problems.

Systems are just a cog in a productivity mechanism that also involves people and processes. The only thing that varies is the ratio; some processes will tend towards a greater degree of automation; others require more manual intervention. There are few business processes that don’t require a team member to provide some form of input or consume an output. A good fit-for-purpose system will facilitate this as much as possible, but there’s still an onus on the team member to play their part, and governance is the tool that helps them do it.

Defining governance

So, what exactly do we mean when we say governance? There're lots of interpretations of what this means in a SharePoint context, but we think of it as a guide to "how we do things around here". There's a tendency for people to think of governance in terms of just a hierarchy of site permissions, but there's much more to it than that. Governance, often communicated in the form of a set of policies and procedures, provides the team member with the actions they need to carry out, a context for their actions, and a guide to how and when to complete tasks.

Governance planning should involve posing questions to the business and using the answers to form the basis of the policies and procedures that control the solution. These can include, but are not limited to, publishing policies, maintenance procedures, help processes, workflows and approvals, document storage and retention policies, and collaboration guidelines.

The reason governance gets overlooked is that it isn't terribly "sexy", nor is it particularly easy to get right. It's often sacrificed to the project mindset mentioned above, where all the energy is focussed on getting a new solution up and running, and ongoing investment and incremental improvements are overlooked. This applies to governance also, as policies and procedures are not updated over time to account for changes in business processes, regulatory or statutory obligations or advances in technology.

Planning for governance


Right from the beginning of any project, you need to be planning for governance. It's likely that you'll have some roles identified as part of managing the project – somebody who can provide input and make decisions on behalf of your practice. This person is often the business owner of the solution under development, or their representative. It's common, particularly in larger practices, for someone with subject matter expertise to act on behalf of a business owner who has a more general focus (usually senior management responsibilities). Straight away this creates a potential pitfall, as the person with the best knowledge of what the solution requires is not likely to be the budget holder. There's also the possibility that project roles won't necessarily have continuity through to business-as-usual operations, depending on how projects are run in your practice.

Governance committee

In order to ensure that the broadest spectrum of business needs are met across the organization from the system, decisions should be made with input from a range of stakeholders. Creating a governance committee is the best way to ensure that decisions include input from the business units that they will affect. Getting this committee set up as early as possible is a sensible move. Certainly, membership should be established prior to the system going live. If possible, one or more initial meetings of the group should be held before then as well. Your governance committee will also be valuable in change management activities, more so if they've had input into project decisions and gained an early understanding of how the system is to be used.

Membership

The membership of the governance committee is one of the first decisions that needs to be made. Membership will most likely be driven by the person who will have ultimate responsibility for overseeing the solution. This's usually a subject matter expert reporting to the business owner. Let's call them the Solution Manager. They'll need the backing of an executive level sponsor to be able to effectively negotiate for resources.



The membership of the governance committee will depend on the organisation. There're no hard and fast rules, but the make-up of the committee should ensure that all areas of the business feel that they have a voice, which'll help to drive a sense of ownership – a real benefit in promoting uptake among staff. It makes sense that the business owner, Solution Manager, and a senior representative from IT should all be on the committee. Representatives from Communications (internal comms) and Human Resources are also popular choices for Intranet governance committees. Other members should come from throughout the business. You may want to have someone from every business unit, or just try to make sure that the different roles in your organization are represented.

You can have as few or as many people as you think appropriate, but just remember that it's a working group that needs to be able to make decisions, and that can get harder with large groups.

If you're a smaller accounting practice, governance doesn't need to be as complex. Membership of your governance committee might just be the owner and a representative from your external IT provider.

Decisions, decisions

So, what are the decisions that need to be made? We've discussed the probable membership of the governance committee, but we also need to establish what's within their remit. What're their inputs, processes and outputs?

In a nutshell, the committee should receive statistics on how the solution is being used by team members, how it's performing technically and the results of any user surveys or user testing that has been conducted. They should then take that information and discuss it to establish what it means for the organization, and what action should be taken. Once decisions have been made, tasks should be assigned to committee members or other staff, and in some cases may need to be communicated to all users. This can range from assigning quick, simple tasks to system administrators through to starting a formal project to manage a major change.

To sum up

It's a rare system that meets business objectives over time without requiring changes. A program of continuous review and improvement is the best way to ensure you maximize your investment and minimize costly overhauls. A functioning governance committee will go a long way to ensuring you achieve this.

SuiteFiles – what it is beyond SharePoint

Ok, so now you've chosen SharePoint and you've sorted your governance. The next step is document management – using software to organise, manage, and track your accounting practice's files.

How does SuiteFiles extend beyond SharePoint?

You could pay a developer and then wait for them to configure SharePoint just for you. Or, you could benefit from us already having configured SharePoint to fit the needs of small-medium accounting practices.

We've developed a document management system built on top of SharePoint with an easy-to-navigate interface crafted by some of the best visual designers around. As you create and store files, you can be assured that they're safe under Microsoft's renowned security. This includes access to multi factor authentication and data loss prevention as well as auditing and logging security measures. Not to mention, you'll be able to enjoy seamless integration between SuiteFiles and Microsoft applications like Office and Outlook. For example, creating email templates and auto-saving your emails in a shared folder.

What makes SuiteFiles unique?

We have a lightning bolt in our logo. Also, we've built features in-house in accordance with the needs of accounting practices.

Signing

SuiteFiles has set itself apart with features like document signing which replaces the laborious manual process of printing, signing yourself, scanning, posting to your client, then physically filing the client signed version.

SuiteFiles also improves on the inefficient digital process of creating a PDF, digitally signing, emailing to your client, then saving the client signed version in the correct folder.

Our signing process all happens within SuiteFiles from creating and signing the PDF, setting automated reminders to sign for your client, and having the client signed version be automatically filed into the right folder.

PDF tools

Let's get into our PDF features! Within SuiteFiles (i.e. without having to open yet another app), you can use all of our PDF tools. Want to call attention to particular areas of your PDF so readers don't miss them? You can add 'sticky notes' and 'stick' them anywhere you like. You can also add stamps, highlight, draw, and overlay shapes. SuiteFiles also allows you to merge PDF files, reorder pages within a PDF, and rotate pages.

Collaboration

Tired of enormous email threads? We've created a task feature which allows you to set tasks with clients and colleagues and chat back and forth without the formality of email. We've even created the Connect feature which allows you to send and receive sensitive documents from your clients without an external portal.

Integrations

In addition to our in-house features, SuiteFiles has built integrations with some game-changing apps like Xero Practice Manager and Karbon. Our partnerships with AccountKit, ATO Smart Docs, ATOMate, CAS 360, FuseWorks and more allow you to shed inefficiencies by automating time-consuming tasks.

On top of providing simple document management, the SuiteFiles team is always looking for ways to make accountants' lives easier and their practices more productive.

The short answer

SuiteFiles builds on SharePoint to provide small-medium accounting practices with a fully integrated document management system supported by a bevy of time-saving features.



About us

We're on a mission to give not-yet-enterprise sized accounting practices enterprise-grade solutions and service. The result? A user-friendly, scalable, robust platform that your team and clients will actually enjoy using. Our product development and customer support teams are responsive – meaning you have people invested in you getting the most out of SuiteFiles. With SuiteFiles, your document management needs are taken care of and your IT burden is lifted allowing you to increase billable hours and strengthen relationships with your clients.

SuiteFiles co-founder and CEO Andrew Sims says, "When we founded SuiteFiles, our first challenge was to create a superb document management system that would allow our customers to confidently navigate through their files. Recognizing that some practices were going to the trouble and expense of configuring SharePoint into their own bespoke document management system, we saw an opportunity to step in. After enlisting some brilliant visual designers, we got to work creating an easily navigable interface suited to the needs of accountants and accounting practices."



▲▲ **Soon enough, we had a document management system which fully integrated with Microsoft applications like Word, Excel and Outlook. We've given businesses the assurance they needed to turn off their servers!**

"As we've developed, we've paid close attention to the needs of our customers and have released features like document signing to keep their businesses humming. Along the way, we've made sure not to lose sight of what our customers love about SuiteFiles the most. We've made SuiteFiles into something that you can pick up and use from the get-go."

Get in touch with our friendly team today to chat about what SuiteFiles is beyond SharePoint then see it for yourself with our free trial. **Request a trial today.** You can get a trial of Microsoft 365 Business including SharePoint at the same time.





SuiteFiles

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