



*Full Service
Knowledge Management.*

- Canada's Leading KM Solution Provider
- Knowledge Management "boutique" since 1992
- Professional Services & Repeatable Solutions
- 20+ Knowledge Management Professionals
- Our clients: **Law Firms** (Stikeman, McCarthy) **Financial** (RBC, JP Morgan Chase) **Health** (GSK, Cancer Care Ontario)



- Outlook is fast becoming a central productivity tool for a growing number of knowledge workers
- As such, Outlook is competing with other information, knowledge and collaboration tools for mind share as well as virtual “desktop share”
- We believe that a KM strategy should leverage ubiquitous tools and established behaviors
- This Webinar is meant to stimulate a debate. There’s no ‘right’ or ‘wrong’ answers to the issues. Whatever you do, do not ignore the dominance of a tool like Outlook.



1

In generic terms: we work hard to make high impact institutional knowledge more readily available to staff – this to substantially improve work efficiencies, quality of output and business decisions

If that is so....

2

Sharing, finding or using knowledge are more effective when tightly integrated to work practices and key business processes



...and thus:

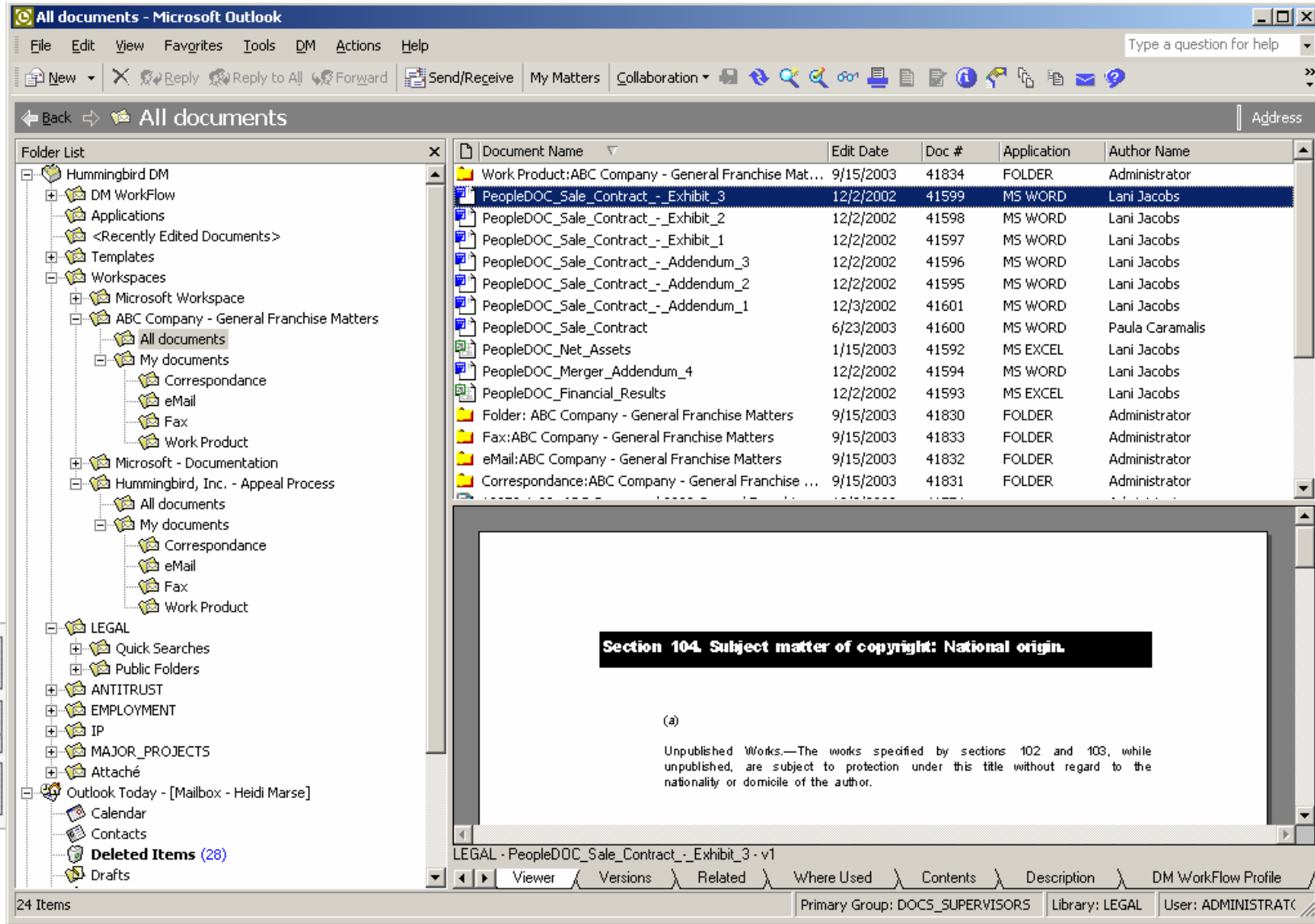
3

Whenever possible, leverage and integrate access, sharing and capture of knowledge with existing business processes and tools



- Make better use of Outlook and its paired repository MS Exchange
 - Implement public folders
 - Tie email with collaboration and archiving
- Use Outlook to access information and other knowledge repositories
 - Access Document Management systems or other repositories in the enterprise
- Outlook and Exchange are leveraged “behind the scenes” – calendaring tasks and emails
 - External collaboration tools and portals use email as a communications method or even calendaring and tasks that appear in Outlook





All documents - Microsoft Outlook

File Edit View Favorites Tools DM Actions Help

New Reply Reply to All Forward Send/Receive My Matters Collaboration

Back All documents Address

Folder List	Document Name	Edit Date	Doc #	Application	Author Name
Hummingbird DM	Work Product:ABC Company - General Franchise Mat...	9/15/2003	41834	FOLDER	Administrator
DM WorkFlow	PeopleDOC_Sale_Contract_-_Exhibit_3	12/2/2002	41599	MS WORD	Lani Jacobs
Applications	PeopleDOC_Sale_Contract_-_Exhibit_2	12/2/2002	41598	MS WORD	Lani Jacobs
<Recently Edited Documents>	PeopleDOC_Sale_Contract_-_Exhibit_1	12/2/2002	41597	MS WORD	Lani Jacobs
Templates	PeopleDOC_Sale_Contract_-_Addendum_3	12/2/2002	41596	MS WORD	Lani Jacobs
Workspaces	PeopleDOC_Sale_Contract_-_Addendum_2	12/2/2002	41595	MS WORD	Lani Jacobs
Microsoft Workspace	PeopleDOC_Sale_Contract_-_Addendum_1	12/3/2002	41601	MS WORD	Lani Jacobs
ABC Company - General Franchise Matters	PeopleDOC_Sale_Contract	6/23/2003	41600	MS WORD	Paula Caramalis
All documents	PeopleDOC_Net_Assets	1/15/2003	41592	MS EXCEL	Lani Jacobs
My documents	PeopleDOC_Merger_Addendum_4	12/2/2002	41594	MS WORD	Lani Jacobs
Correspondance	PeopleDOC_Financial_Results	12/2/2002	41593	MS EXCEL	Lani Jacobs
eMail	Folder: ABC Company - General Franchise Matters	9/15/2003	41830	FOLDER	Administrator
Fax	Fax:ABC Company - General Franchise Matters	9/15/2003	41833	FOLDER	Administrator
Work Product	eMail:ABC Company - General Franchise Matters	9/15/2003	41832	FOLDER	Administrator
Microsoft - Documentation	Correspondance:ABC Company - General Franchise ...	9/15/2003	41831	FOLDER	Administrator
Hummingbird, Inc. - Appeal Process					
All documents					
My documents					
Correspondance					
eMail					
Fax					
Work Product					
LEGAL					
Quick Searches					
Public Folders					
ANTITRUST					
EMPLOYMENT					
IP					
MAJOR_PROJECTS					
Attaché					
Outlook Today - [Mailbox - Heidi Marse]					
Calendar					
Contacts					
Deleted Items (28)					
Drafts					

24 Items

Primary Group: DOCS_SUPERVISORS Library: LEGAL User: ADMINISTRATC

Section 104. Subject matter of copyright: National origin.

(a)

Unpublished Works.—The works specified by sections 102 and 103, while unpublished, are subject to protection under this title without regard to the nationality or domicile of the author.

LEGAL - PeopleDOC_Sale_Contract_-_Exhibit_3 - v1

Viewer Versions Related Where Used Contents Description DM WorkFlow Profile

Inbox - Microsoft Outlook

File Edit View Favorites Tools Actions Help AdvanceKnowledge

AdvanceKnowledge Search: asset purchase; asset supp Select Keyword

Back AdvanceKnowledge

Folder List

- Archive Folders
- Outlook Today - [Hugh Ranalli]
 - Calendar
 - Contacts
 - Deleted Items
 - Drafts
 - Inbox
 - Journal
 - Junk E-mail
 - Notes
 - Outbox
 - Sent Items
 - Tasks
- Public Folders
- AdvanceKnowledge**
 - Corporate Finance/M&A
 - Business organizations
 - Contract building blocks
 - Corporate Finance/M&A
 - Distributions
 - Managed investments
 - Mergers, acquisitions & reorganizations
 - Acquisitions
 - Asset sales**
 - Share sales
 - Issuer bids
 - Mergers
 - Related party transactions
 - Reorganizations
 - Shareholder rights plans
 - Special committees
 - Takeover bids
 - Public issuers & shareholders
 - Registration & registrants
 - Secondary markets
 - Securities regulation
 - Securitization
 - Employment and Labour
 - Financial Services
 - Litigation
 - Real Property
 - Taxation
 - Technology

Sheet Type

WIP Title

- Sheet Type : Advice Sheet [4]
- Sheet Type : Precedents Document [6]
 - ABC Co. Confidentiality Agreement | A-4669

Confidentiality agreement for financial restructuring when the company was not financially healthy at other strategic alternative transaction.

Asset purchase - Bulk Sales Act affidavit of purchaser

Affidavit of purchaser of assets that are the object of application to a court under the Bulk Sales Act

Asset purchase checklist | A-4662

Summary of important points to cover for an asset purchase, Negotiating the agreement, Ancillary documents
 - Share purchase - indemnity from vendor | A-4666

Confidentiality agreement for financial restructuring when the company was not financially healthy and was strategic alternative transaction.

Share purchase - release by officers and directors

Release by officers and directors of any claims that may be asserted against the purchaser of shares in a share purchase transaction, the purchaser of whose shares are being purchased. One source
 - Share purchase - share purchase agreement | A-4669

Agreement for the sale of the designated shares
- Sheet Type : Professional Contacts [3]
- Sheet Type : Reference Document [5]
- Sheet Type : Skills Matrix [8]
- Sheet Type : Transaction Sheet [5]

Keyword Assistant

Search Keywords: as

Available Keywords:

- ASC
- ASC Executive Director
- ASP
- asset acquisition
- asset backed loan
- asset checklist
- asset freeze
- asset purchase
- asset purchase agreement
- asset support
- asset transfer
- asset-based lending
- assets checklist
- assignability

Selected Keywords: asset purchase; asset support; asset transfer

Done Cancel Suggest New Keyword...

From: Precedents Committee
Subject: ABC Co. Confidentiality Agreement | A-4669
To:
Cc:

Precedent Sheet

ABC Co. Confidentiality Agreement

Reference number: A-4669

Contributed by: French

General Information

Summary

English: Confidentiality agreement for financial restructuring of public company

French

In Progress

19 Items, 3 Unread

Should (and could) Outlook become a more focused platform for KM?

- Your users are "married" to this tool; you believe that by adding KM functionality to Outlook you will dramatically increase your chances of success
- You can see the value of integrating its inherent functions with KM practices
- You can identify vendors that have "off the shelf" plug in solutions, such as Hummingbird and Entopia, and Interwoven just to name a few
- You have a strong development team or a trusted outsourcing organization



Outlook presents substantial challenges:

- Some of Outlook's functions have already shifted into a platform (e.g. enterprise or thematic portals)
- You are convinced that other business applications are as critical to your users and therefore more appropriate for delivery of KM processes and functionality
- You find that Outlook solutions are too complex to develop on your own and none of the 3rd party solutions suit your needs



Complex, broad and powerful – MAPI (Messaging API)

- Good understanding of how your information can fit within the Outlook interface - Screen mockups, functional specifications, etc. are important to understanding if the Outlook UI is amenable to your data
- Good understanding of what functions (searching, sorting, grouping, forwarding, etc.) will be most valuable to your users
- Good understanding of the MAPI (Messaging API) protocol - this is the only way to expose data through Outlook
- Development experience with COM and C++ (MAPI applications must be developed in C++)
- Persistence, especially for your first project - MAPI development is complex and support for it is hard to find
- These steps are iterative - Without some understanding of MAPI you can't visualize what can and can't be done with Outlook



Faster, and more focused “document” based solutions – Microsoft IBF (Information Bridge Framework)

- .net based solutions that are applicable not only to Outlook but right across MS Office
- Will allow contextual access to information and knowledge that may reside in other systems, directly from “documents” like MS Word or email messages, usually through a “task pane” – a feature of Office 2003



Screen | Microsoft IBF – MS Word document with a task pane

The screenshot displays the Microsoft Word 2007 interface. The main window shows a document titled "Document1 - Microsoft Word" with a menu bar (File, Edit, View, Insert, Format, Tools, Table, Window, Help) and a ribbon with various icons. The document content includes a header for "Litware, Inc." with address "1234 Baker Blvd. Eugene, OR 97403 USA", a "CUSTOMER QUALITY" logo, and a "Notification of Change in Service" section. The notification details include "RE: Service Request Ticket #SR161478", "Valued Customer: Contoso", and "Dedicated Care Professional". Below this is a table with columns for "Date of your request", "Your request priority level", and "How we resolved your request". The date is 1/9/2004, the priority is Moderate, and the resolution is Automated. A section titled "The details of your request:" contains the text: "Venting column has moisture built up in the discharge gasket; unit is post-inspection and in compliance with OSHA testing for safety". The document ends with "Dear Customer," and "Document Body Section".

On the right side, the "Document Actions" task pane is open, displaying information for "Employee: François Ajenstat". It includes a "Back" button, "Employee Details" section with fields for Title (Account Executive), Role (Staff), Department (Account Management), Region (US-West), and Phone ((555) 555-0123), and an "Assigned Accounts" section listing Adventure Works, Alpine Ski House, Coho Winery, Contoso, and Lucerne Publishing. Navigation buttons "Previous" and "Next" are also present.

At the bottom of the Word window, the status bar shows "Page 1", "Sec 1", "1/1", "At 0.7\"", "Ln 1", "Col 1", and various view and print icons.

