Office 365 as a Knowledge Management Tool

And beyond to Project Cortex

There has been much talk about the new tools appearing in Office 365 and how they will support knowledge sharing in organisations. Microsoft has recently announced further developments via its Project Cortex which will provide even more interesting opportunities for knowledge management. However, Office 365 includes so many different components that it is easy to get confused. Our Knowledge Management Forum on 07 November 2019 discussed these topics, with the help of Gabriel Karawani from ClearPeople.

Gabriel's blog about Project Cortex can be found here.

Up in the clouds

Office 365 is of course cloud based. Many law firms have been hesitant about moving to the cloud, fearing a loss of control and in some cases because of cloud-averse stipulations from their clients. Over the last five years firms have become more comfortable, realising that the large cloud providers are far better able to manage security and resilience. Microsoft now offers a service in which you can specify where your data will reside, which helps organisations manage data protection compliance.

What tools do you get?

In addition to cloud versions of the traditional **Microsoft Office products** (Outlook, Word, PowerPoint, Excel), Office 365 offers a number of tools for storing and sharing content and for communication. This is where confusion can arise. For example, there are now potentially seven places where you could find a task list, although we understand that Microsoft is now looking to consolidate these into one – until then you have a marvellous excuse for not knowing about a task allocated to you, at least until your organisation defines the required policies and procedures.

Microsoft licensing packages are notoriously complicated and offer different combinations of tools. For knowledge managers, **SharePoint** (now in its online version) continues to offer a place to capture and publish content, supplemented by collaboration and communication tools including **Yammer** and **Teams**.

Delve, an AI enabled tool to surface content of relevance to the individual user, does not seem to have taken off and organisations have said that it is 'too much', no doubt with users wondering why certain content is being shown to them. Perhaps it is a case of too much too soon.

A key component of the Office 365 platform is **Flow**, a cloud-based service that makes it practical and simple for system administrators, and potentially users, to build workflows that automate business tasks and integration processes across applications and services. You can use Flow to connect email and IM alerts, synchronise files between applications, copy files from one service to another, collect data from one app and store it in another, and more. Many of the legal tech suppliers either already have, or are in the process of developing, a library of facilities for users of Flow to adopt.

Having a single ecosystem providing all these tools with a single login is an attractive proposition.

Is Teams the answer for knowledge management?

Teams is the new element for many. It combines file collaboration with chat. Skype for Business is now absorbed into **Teams** providing a facility for calls and online meetings. Teams also provides file sharing (with the files stored behind the scenes in SharePoint), messaging, wikis and task allocation. Within each Team site you can have multiple channels, each representing a project. At 3Kites we have found this useful for developing new ideas. In particular, if you were not involved in a project from the outset you can see the thread of conversations, unlike the situation where you come late to an email group.

However, helpful as this is, the concern is that Teams can just be yet another place where people communicate. Unless it is very clear what should be communicated where, people will revert to email (or indeed text or Whatsapp) and the benefit of having work collected in a Teams site will be lost. Further, unless you are on the Teams application regularly during the day you will not be aware of new conversations, documents and tasks (except by email notifications if you choose to have them, which rather defeats the object). For organisations that want to reduce email traffic this may seem attractive, but it will require a change of working practices which will need to be carefully managed. In the legal world at least it seems that users will live in Outlook for the foreseeable future particularly while clients are communicating by email.

We think it is unlikely that law firms will want to use Teams channels as their file management for client matters in the near future. They have invested in document management systems with robust versioning and security and the ability to store emails alongside other document types. Teams does not provide the same level of functionality although integration with DMS products may help to bridge the gap here. It should also be noted that some vendors are developing their own tools which could provide similar functionality alongside document management, adding to the options in an already crowded collaboration space.

Some licensing models offer the ability to extend Teams to external users, which may be a useful feature, but again is not an immediate answer to the need for a matter extranet.

What is the business need and what tool should you use for what?

This is the key question. Unless organisations put some structure around the way they use these tools, it will be a backward step for knowledge management, because more silos will be created.

ClearPeople's recommendation is to use Teams for communication within a project, with SharePoint as the repository for related content and Yammer to communicate with the wider organisation about it. It is worth mentioning that ClearPeople has created a product, Atlas, which makes it easy to do all this in Office 365 with a clean UI and easy processes.

Search

Microsoft is working on a consistent search experience across all its products. The company also has a vision for universal search not only across all of Office 365 but extending to other applications including the common document management systems. Perhaps one day you will be able to run a search across all your content from within Outlook. This sounds very good in theory, but the user experience and the ability to filter search results will be key. The fact that there are plans to modernise the SharePoint Term Store, so that you can use consistent tagging across all of Office 365 will make a big difference. But it will not take away the need to think carefully about taxonomies.

The future – Cortex

At the Ignite event (03 to 08 November2019), Microsoft announced Project Cortex (amongst other things) which sounds like a major step forward for knowledge management. It is badged as converting data into knowledge, although long term knowledge management professionals have heard that many times before. An expert evaluation can be found in Gabriel's blog[1] but it is based on the concept of knowledge networks of shared topics, with automatically created 'topic cards' which highlight key content and experts. It sounds as though automatic tagging will be supplemented by expert review and it will not be necessary to have a large training set of documentation to enable the machine to learn how to tag.

Cortex does sound exciting but it is not here yet. It will be interesting to see how it develops over the next couple of years and we at 3Kites will continue to monitor this area for developments.

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[1] See the link at the beginning of this article.