

Live Publish - Customer Case Study

Wealth Management, Stockbroking and Financial Services

Name	Patersons Securities Limited
Website	psl.com.au
Region	Perth (WA), Australia

Patersons Securities Limited is an Australia-wide Wealth Management and Stockbroking firm that has been helping clients invest their money wisely for 114 years. With 11 offices across Australia and regional WA, Patersons is a trusted provider of Wealth Management and Stock Investment advice to thousands of clients.

Situation:

Patersons use SharePoint 2013 as their intranet platform; this is a critical system for the whole business to communicate news and information to staff on a daily basis. Staff rely on the intranet to keep them abreast of internal events, breaking news, new and updated business-related knowledge.

The Patersons Research department uses Live Publish to generate HTML research reports for internal consumption. The latest research information can be accessed by the wealth management team from the intranet. Live Publish makes the process of publishing these reports very simple, with little training required.

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Solution:


Patersons chose Qualitem Live Publish to assist the communication and research teams simplify their content creation and publishing processes.

Both teams create their content using Microsoft Word. They include images, attachments and URLs to reference sites to support the news articles and research reports. With the click of a button, Live Publish manages the conversion from Word to a HTML publishing page. During the content creation process, images and attachments embedded within the MS Word document are stripped out, uploaded to SharePoint and the links to these attachments are inserted in to the HTML content and associated via related reference links.

For Patersons, Qualitem Live Publish makes the process of creating SharePoint publishing pages (and wikis) simple and eliminates the need for content creators to learn HTML; they simply build your web page in Microsoft Word and publish it to SharePoint.

Benefits:

- One step process, Microsoft Word -> SharePoint
- Attachments and images automatically handled by Live Publish
- Easy to use publishing of web content using Live Publish
- A quick and efficient content creation process requiring little training



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