ESDC - A CASE STUDY: MANAGING EMAIL WITH HARMON.IE IN M365

THURSDAY MAY 20TH |1:30 P.M. – 2:30 P.M.

harmon.ie

Orangutech

Employment and Social Development Canada

Canada

Increasing User Adoption of Microsoft Solutions

Software

Solutions

Services

Experts in the Federal Government

Thought leaders in the move to the M365 Cloud

Experts at navigating the procurement process

Canada

Value Focused

Microsoft Partner

Microsoft

Gold Application Development
Gold Collaboration and Content
Gold Cloud Productivity

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Agriculture and Agri-Food Canada

Library and Archives Canada

Bibliothèque et Archives Canada

“Doing **Information Management** Without Doing **Information Management**”

Alexandre Singh
Executive Director Business Solutions
and Information Management

Employment and Social Development Canada
Canada

Employment and Social Development Canada (ESDC)

ESDC has 32,000 employees across Canada

60-70% are regional employees
30-40% employees in Ottawa

Among its many services ESDC is responsible for:

Employment Insurance **(EI)**
Canada Pension Plan **(CPP)**
Old Age Security **(OAS)**
Guaranteed Income Supplement **(GIS)** benefits
Social Insurance Numbers **(SIN)**
Veterans Affairs Canada Services

ESDC is the GoC agency responsible for **developing**, **managing** and **delivering** social programs and services.

The Pandemic Accelerated Migration to Microsoft 365

Prior to the COVID-19 pandemic:

- Organization stored documents in ‘file shares’ and SharePoint 2010
- SharePoint 2010 was deployed, but adoption as a repository was voluntary – not centrally driven
- No implementation of GCDocs as an Enterprise Document & Records Management System (EDRMS)

COVID-19 pandemic accelerated the move to Microsoft 365

- 30,000 users moved to Microsoft 365 in just 3 months! (Teams, OneDrive, SharePoint Online)
- Outlook mailboxes were ‘exploding’ – emails and attachments were stored on Exchange ‘forever’
- Needed a way to migrate content to Microsoft 365
- Needed a way to capture, classify, and share important emails and document attachments
- Needed a way to eliminate ‘document chaos’ associated with widespread sharing of attachments
- Needed a way to verify people have access to a file before sharing with them

The Challenge

"How to Do IM Without Doing IM in a Post-COVID World"

- Help employees focus on work, collaborate effectively with IM happening effortlessly
  - Make it easy to upload and classify important emails and documents in a centralized location so others can access the latest version of an email/document
  - Make it easy to classify content using approximately 10 metadata fields
  - Make it easy to share document links instead of attachments
  - Make it easy to find important emails and documents
- Meet the organization's comprehensive accessibility requirements of WCAG2.1 and align with European standard EN 301 549

The harmon.ie Journey

- ESDC only had a small footprint for an attachment mgmt. solution to address immediate needs from Legal
- We reached out to other GoC agencies, they recommended harmon.ie
- harmon.ie was selected because it enables ESDC to *"Do IM Without Doing IM"*
  - harmon.ie makes it easy to capture and classify (using metadata) emails and document attachments in SharePoint 2010/Online
  - harmon.ie is tightly integrated with Microsoft 365 (Teams, SP Online, OneDrive) where employees do all their collaboration
  - The harmon.ie user experience mirrors the UX familiar to ESDC employees (from legacy systems)
  - harmon.ie enables employees to continue working in their comfort zone (Outlook)
  - harmon.ie enables employees to easily 'self-migrate' emails from Exchange on-premises to SharePoint Online (M365)
  - harmon.ie addressed ESDC's comprehensive accessibility requirements
  - Orangutech is a trusted partner

IM and harmon.ie Roadmap

- It's early days, but we are excited….
- Obtained approval from ESDC COO to proceed with harmon.ie project
- Performing project scope analysis, establishing key stakeholders, and collecting key metadata requirements (Sprint 0)
- Launch Agile POD in June to begin with Sprint 1, for deployment to pilot group by September

"harmon.ie enables our employees to do IM without knowing they are doing IM… And that makes all the difference."

Alexandre Singh

Executive Director Business Solutions and Information Management

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Futures

- Leverage harmon.ie to reduce mailbox sizes for better performance of Exchange servers
- Facilitate the “clean up” work on mailboxes for migration to Exchange Online
- Use as a “lever” for network share community to migrate to SP Online
- Use as an easy input for requirement metadata
- Address Business Process Reengineering of business process that are reliant on “attachments”

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Orangutech

ANNOUNCING

harmon.ie 365

Doing IM Without Doing IM…
With Microsoft 365

David Lavenda
Chief Product Officer, harmon.ie

Microsoft Co-Sell Ready Partner

Gold Microsoft Partner

Microsoft 365 App Certified

Microsoft Content Services Partner Program Charter Member

The Key to Effective IM

CAPTURE

emails and documents to SharePoint, OneDrive, Teams from Outlook

CLASSIFY

emails and documents with metadata

DISCOVER

emails and documents quickly, with unmatched Search and Discovery tools

SHARE

emails and documents with colleagues

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Doing IM Without Doing IM....With Microsoft 365

Finding and discovering important content in **emails & documents**

Getting help from **Colleagues** when working with clients

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INTRODUCING

harmon.ie 365

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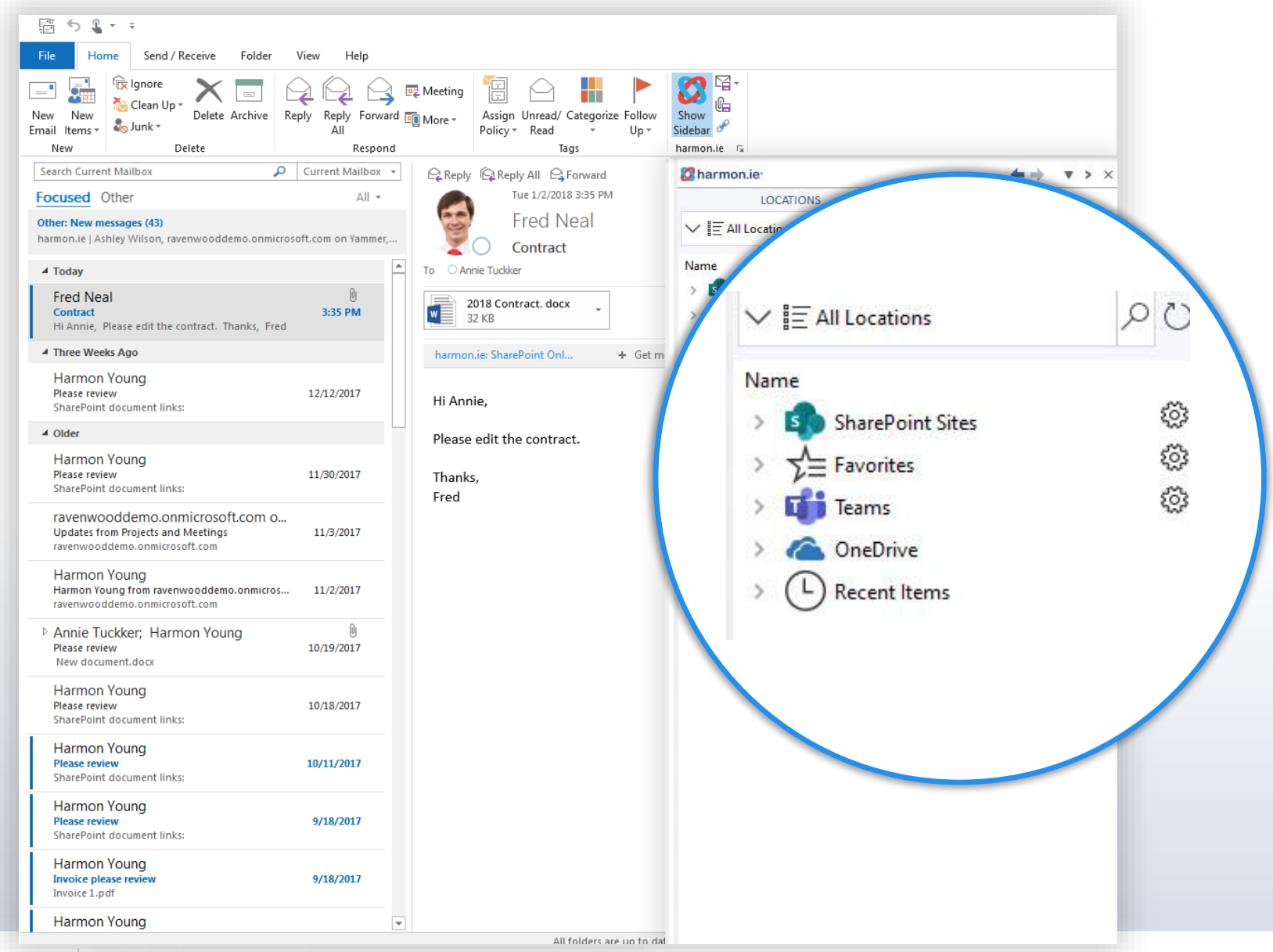
Access All Microsoft 365 Apps from Outlook

Staying in the Worker's "Comfort Zone" boosts Microsoft 365 Adoption



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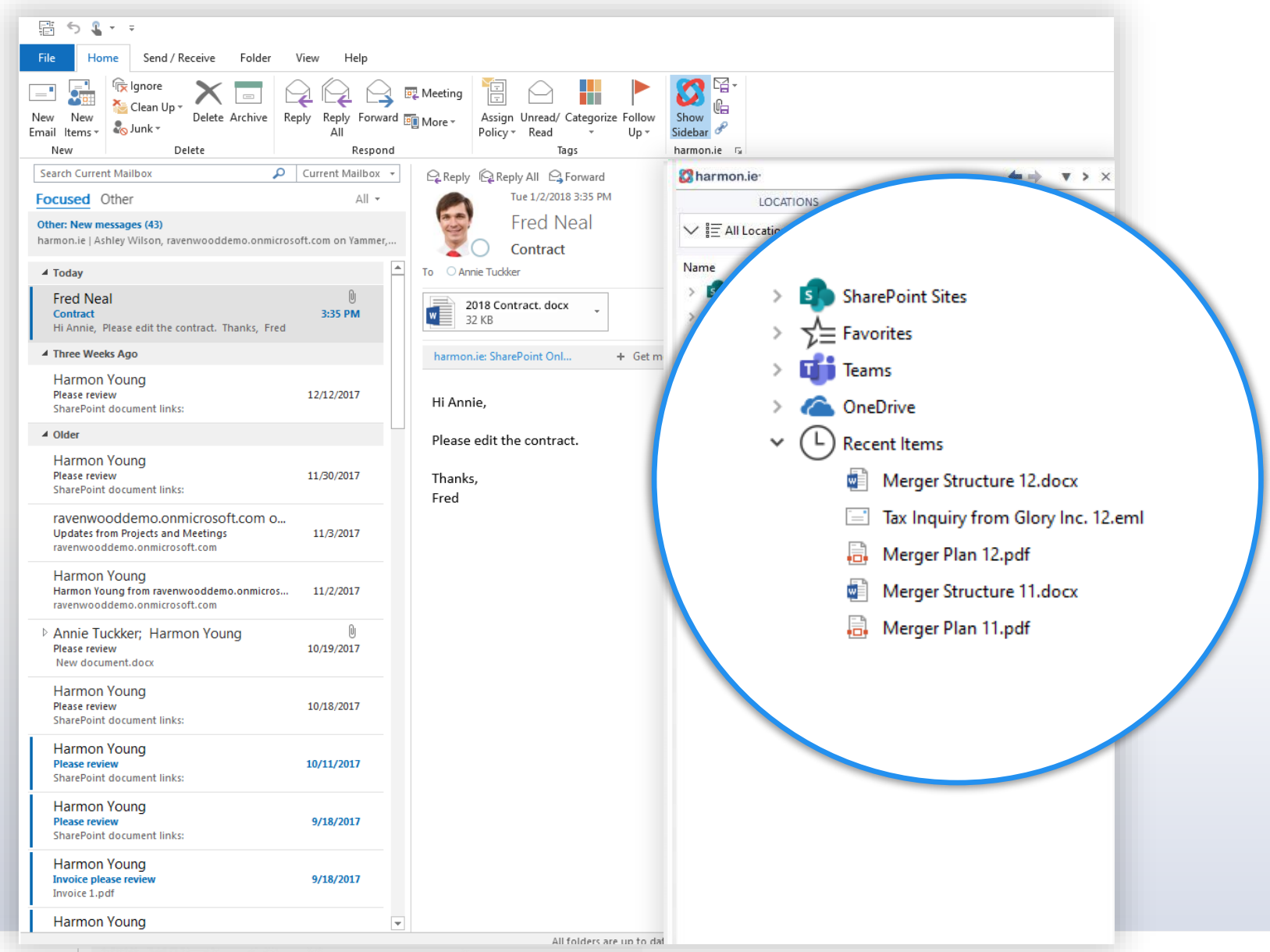
Recent Items

My most recent items from across Microsoft 365 apps



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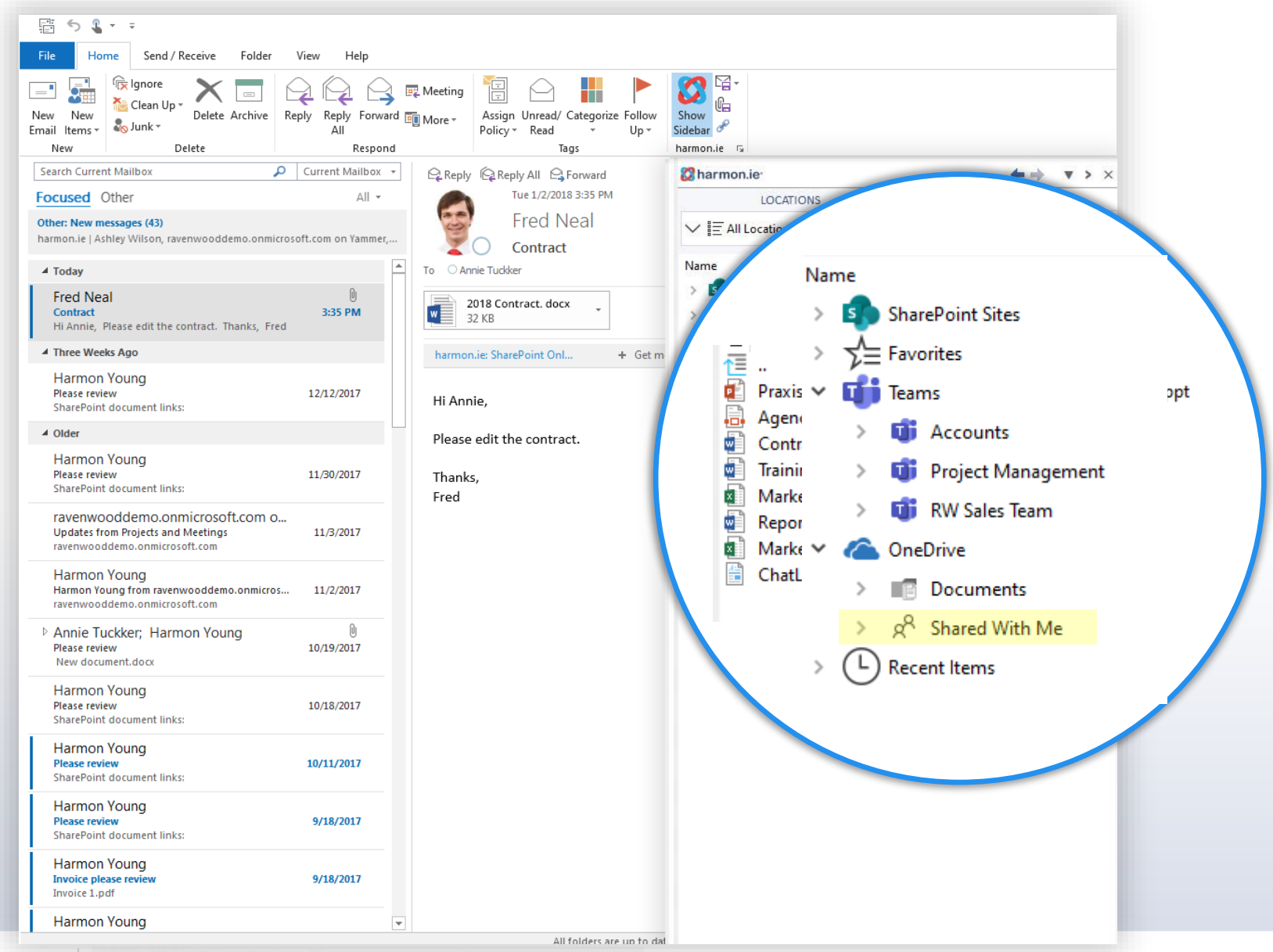
‘Shared With Me’ Items

Items shared with me from across Microsoft 365 apps



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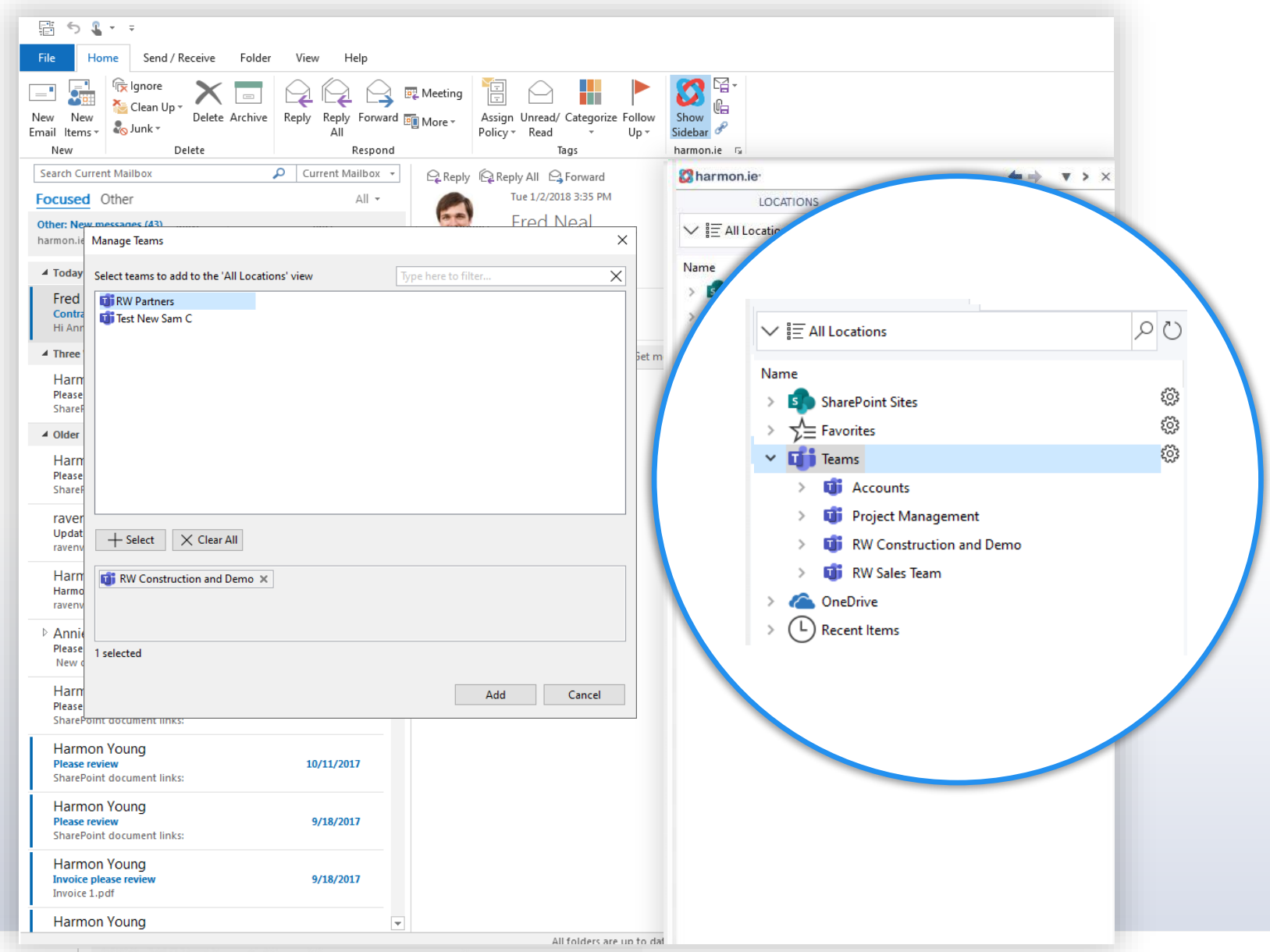
Discover & Favorite Teams

Access your most important Teams from Outlook



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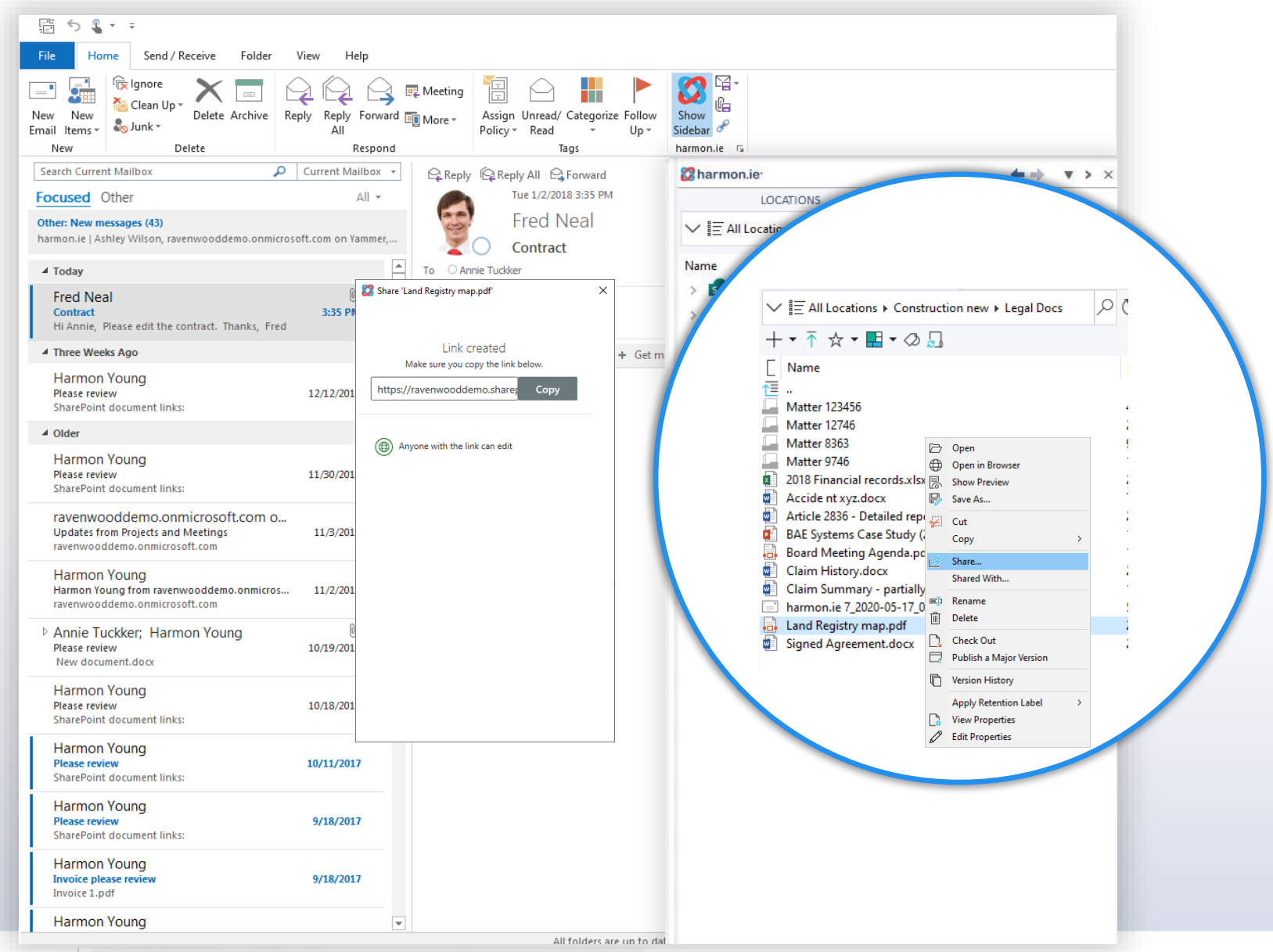
Modern Share Experience

Granular share capabilities
right from Outlook



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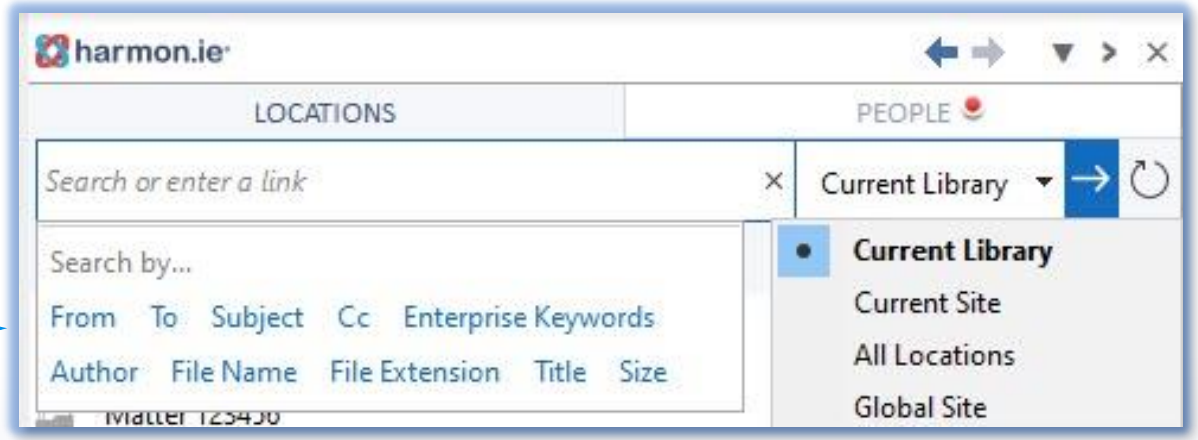
Search Across Microsoft 365 Apps

Type text to search or enter SharePoint link to navigate to location or document

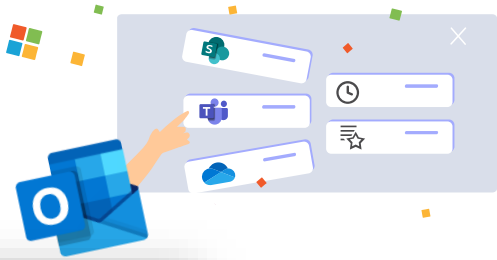


Search by Email Fields
Search by managed metadata
Set search scope

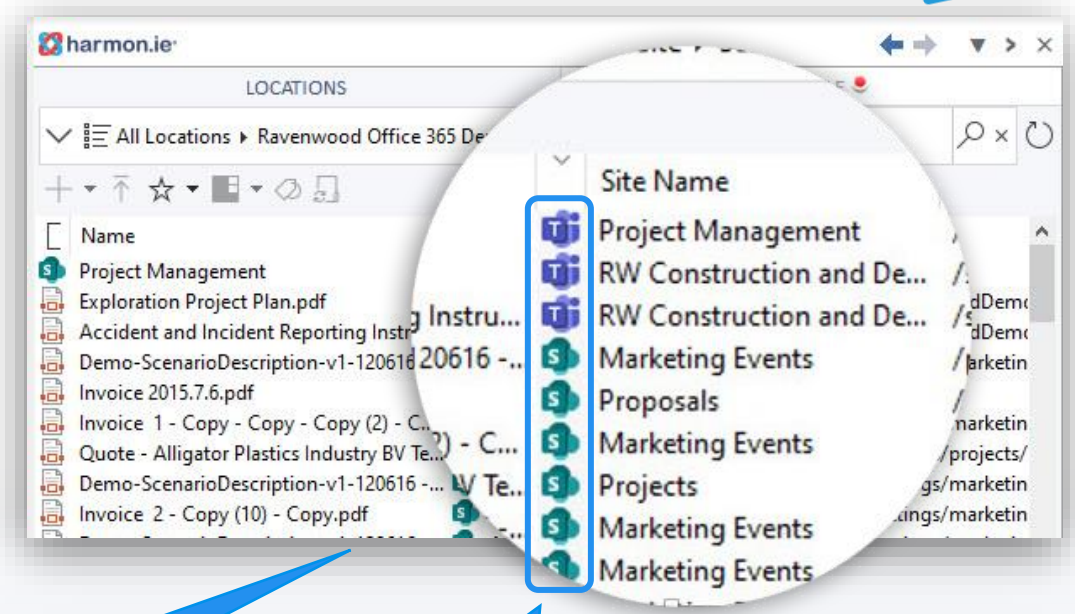
Search by column or metadata

Search scope

Search Across Microsoft 365 Apps



Filter/Sort by Microsoft 365 App
Filter/Sort by Site
Navigate directly to location



Filter Results by Microsoft 365 App

Filter results by Site Name

Navigate using “Open in location”

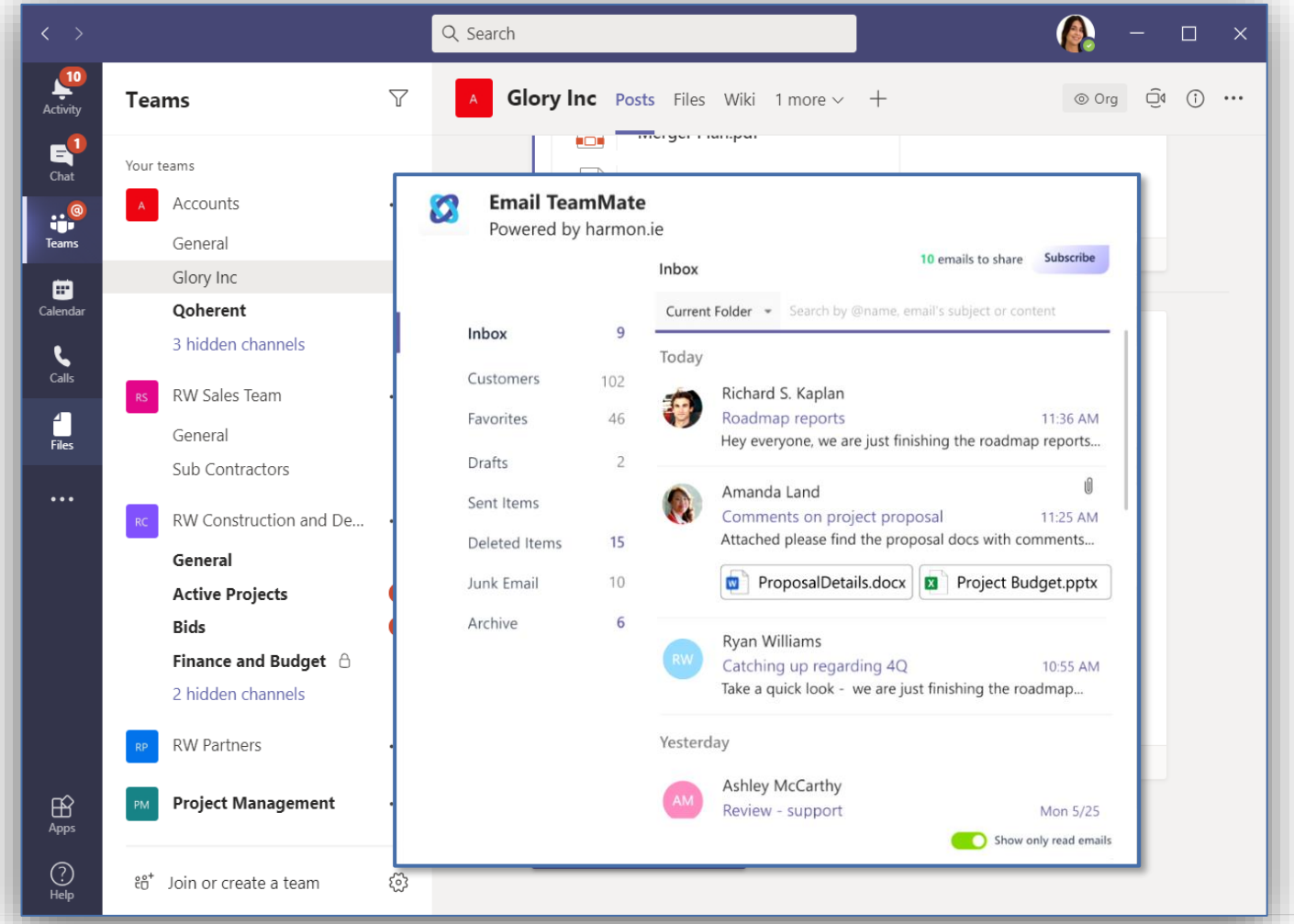
Email TeamMate™

Get Help from Colleagues When Working with Colleagues

Email TeamMate™

New harmon.ie App: Email TeamMate

Ask for help from colleagues by sharing emails, from inside Teams



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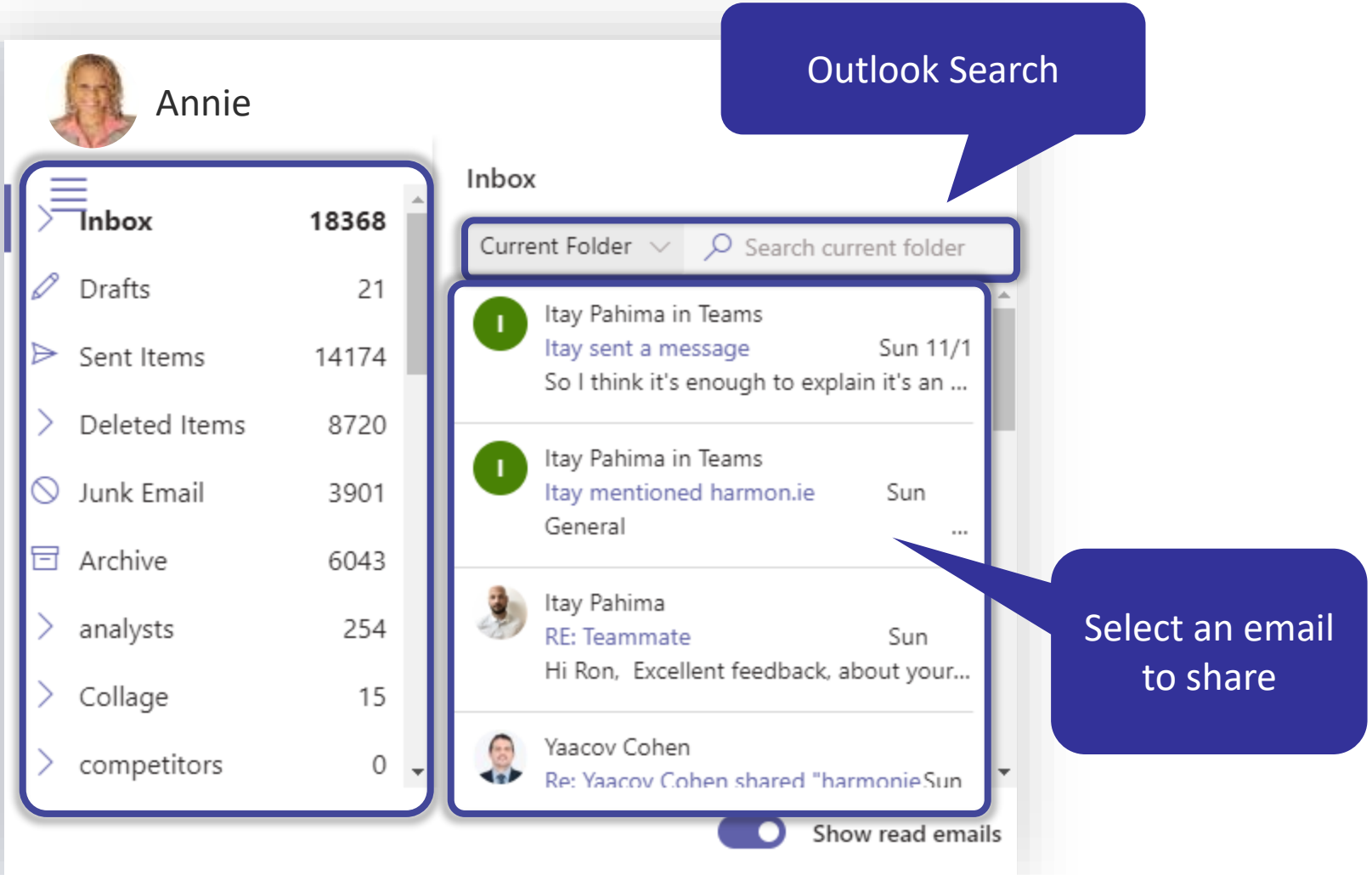
Email TeamMate™

Find the Right Email to Share

Outlook Folder access

Familiar Outlook interface in a Teams app



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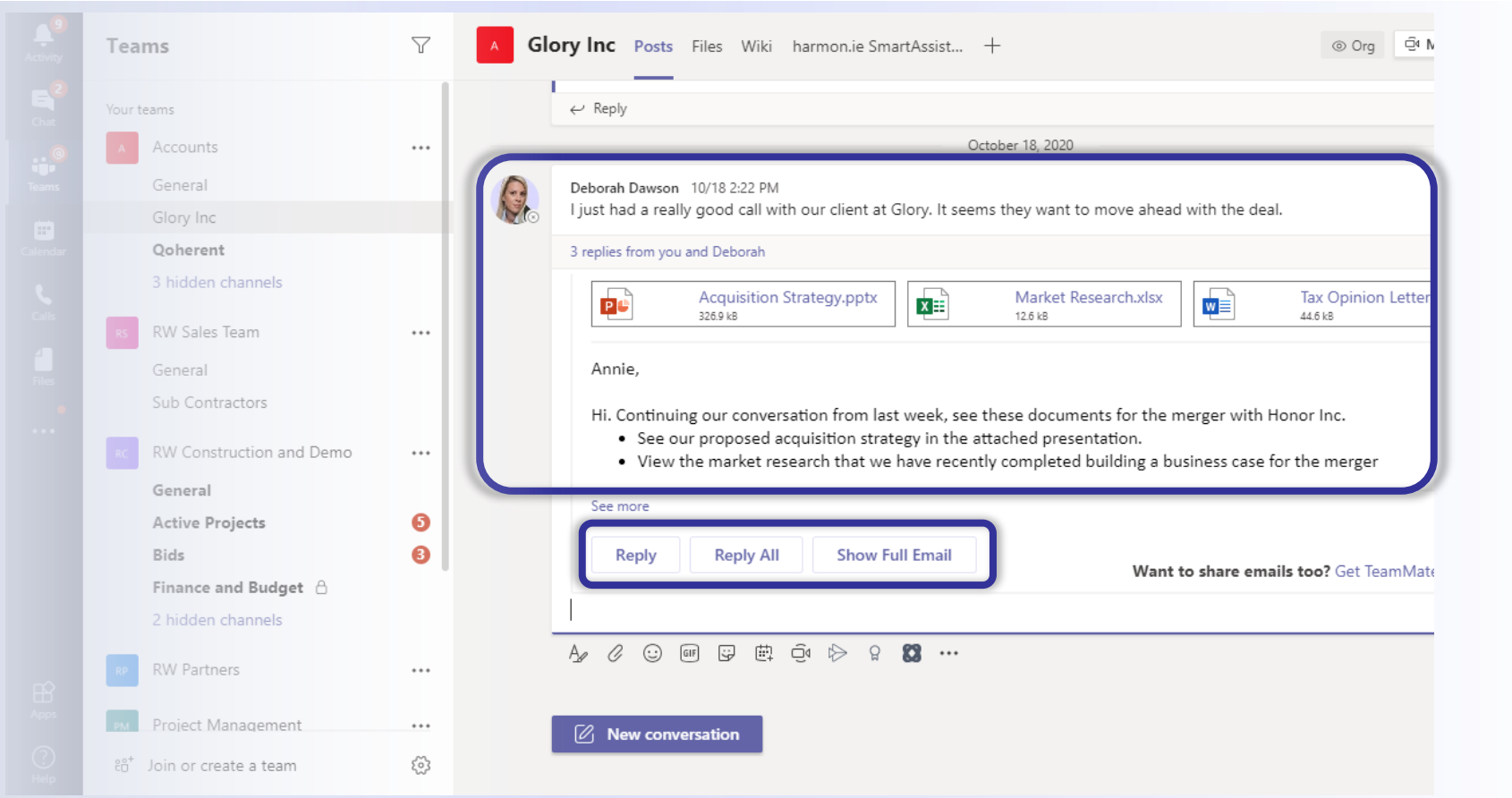
Email TeamMate™

Get Help From Colleagues in Real-Time



- Your colleagues can read emails and attachments that are embedded in a conversation
- Your team can then collaborate about the email
- Colleagues can even reply to emails *you* received, directly from the Teams conversation

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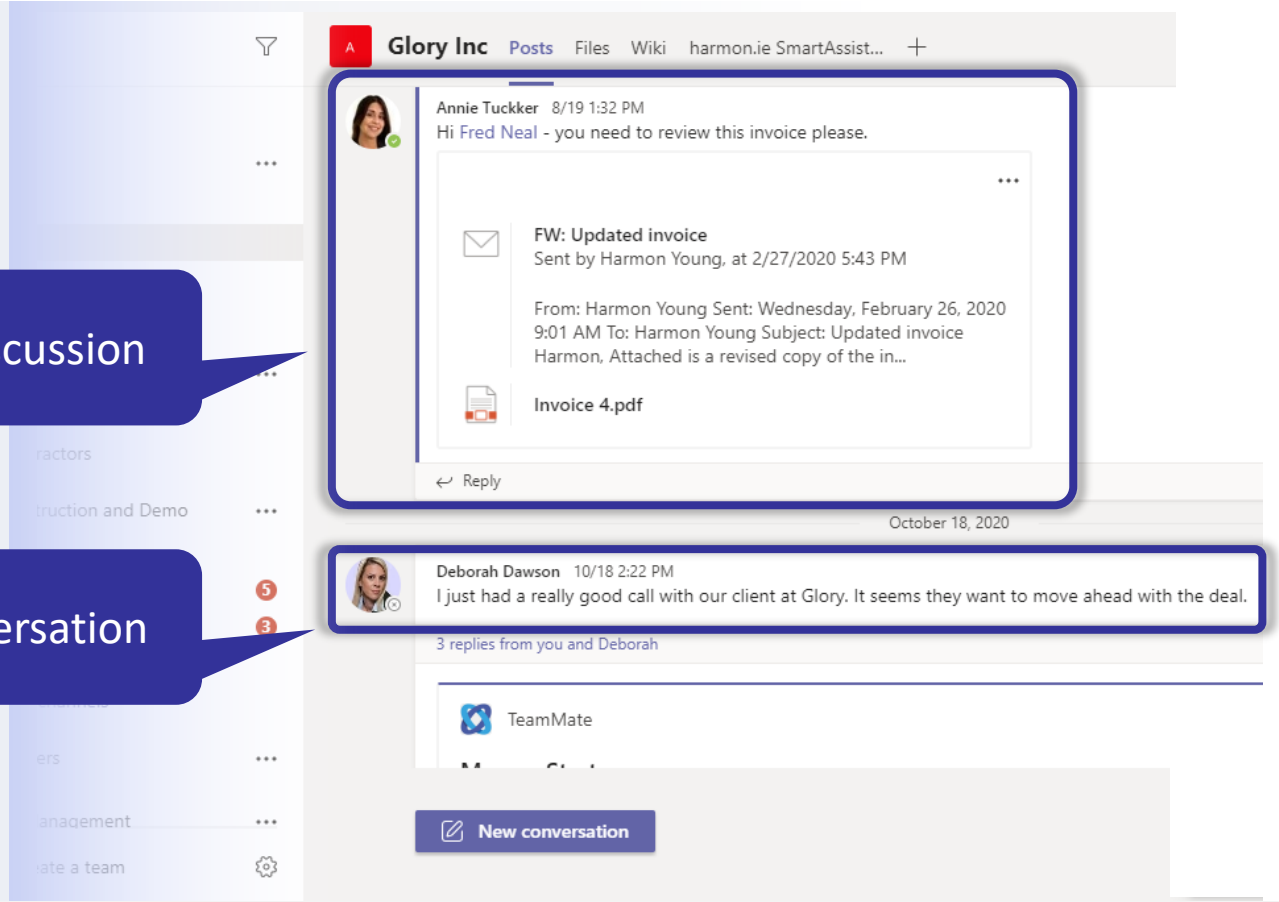
Email TeamMate™

The Complete Discussion in One Place – Microsoft Teams

The outside email discussion

The internal Teams conversation



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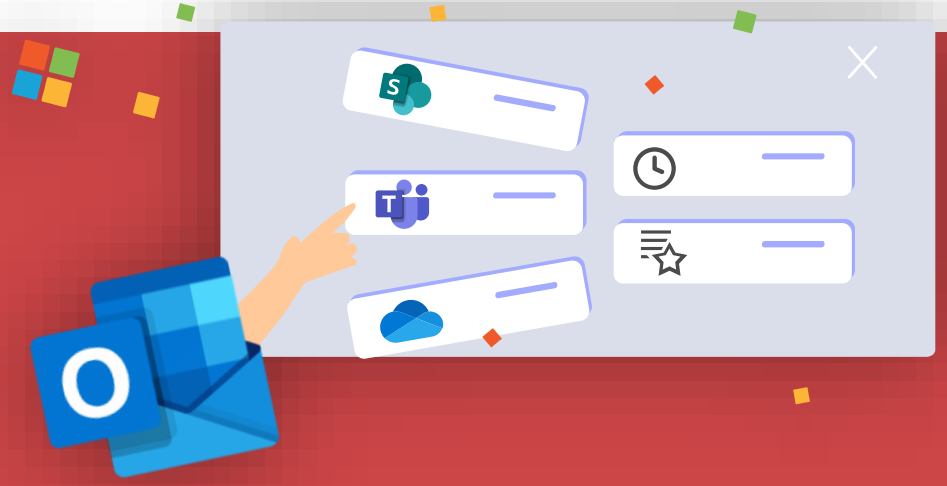

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Doing IM Without Doing IM

Get Early Access:

https://harmon.ie/get365

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