

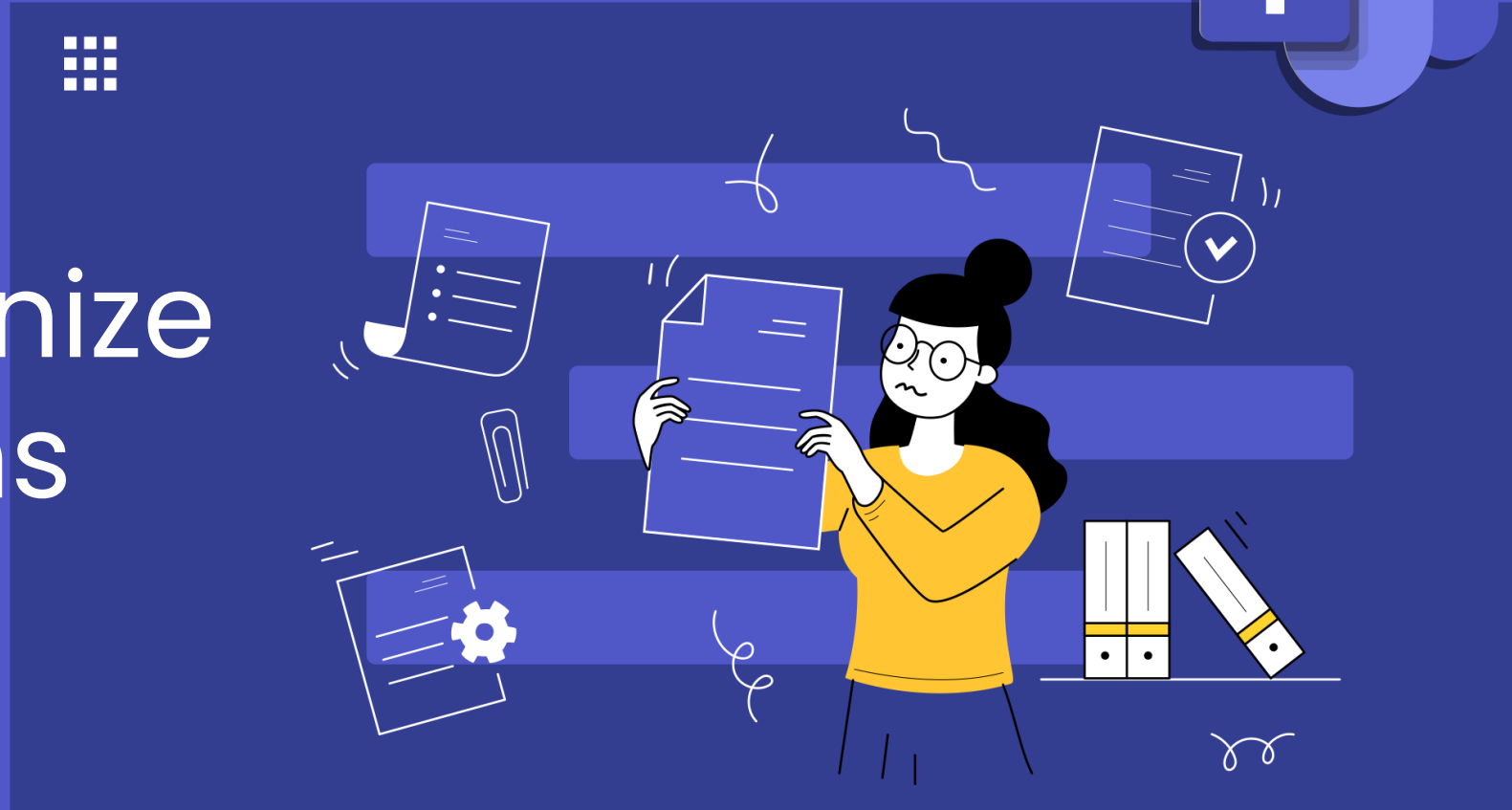
# How to Organize Files in Teams



**Yaacov Cohen**  
CEO & Founder



**Corey Tinianov**  
Product Manager



# Microsoft Teams Files Explosion





# Risks & Liabilities

- Document leaks
- GDPR breach
- Legal liability
- Information loss



# Manage Content – Mitigate Risks

- Document Classification Policy
- Document Retention/Disposition Policy
- Simplify compliance





# Adding Metadata in Microsoft Teams Files Tab

The screenshot shows the Microsoft Teams interface with the 'Files' tab selected in the 'General' channel. A table of documents is displayed with the following columns: Name, Modified, Modified By, Status, and Document Owner. The 'Status' column contains custom metadata values like 'In Progress' and 'Backlog'. A red box highlights the 'Document Owner' cell for 'Project Plan.xlsx', which contains the name 'Adele Vance'.

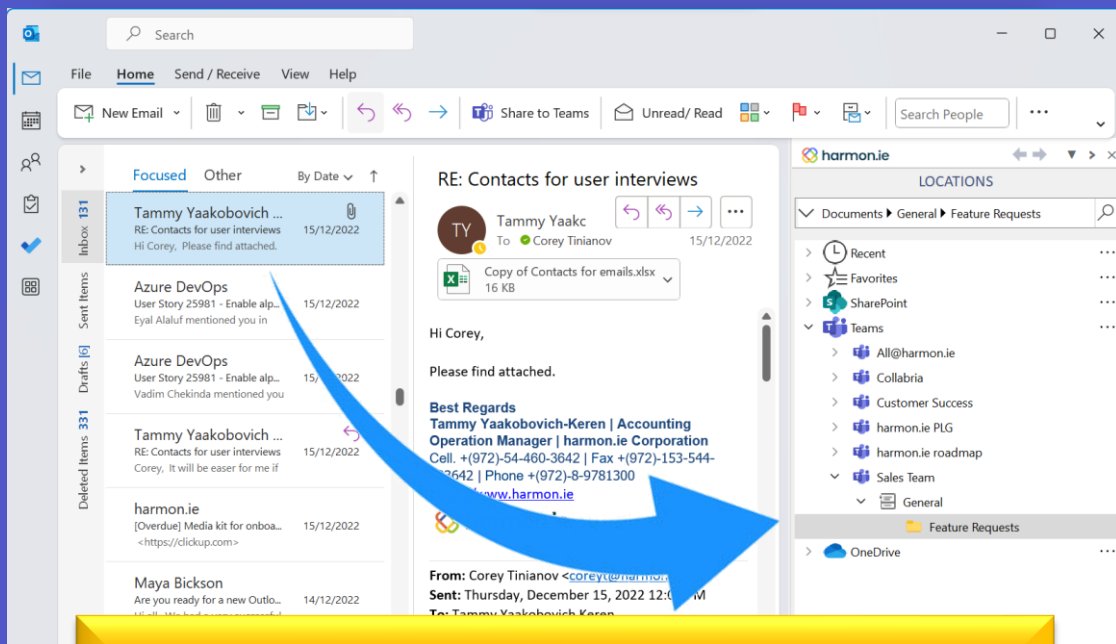
Name	Modified	Modified By	Status	Document Owner
Business Case.docx	9 minutes ago	Luigi Iacobellis		Alex Wilber
Project Budget.xlsx	About a minute ago	Luigi Iacobellis	In Progress	Johanna Lorenz
Project Charter.docx	About a minute ago	Luigi Iacobellis	In Progress	Adele Vance
Project Overview.pptx	About a minute ago	Luigi Iacobellis	Backlog	Alex Wilber
Project Plan.xlsx	About a minute ago	Luigi Iacobellis	In Progress	Adele Vance



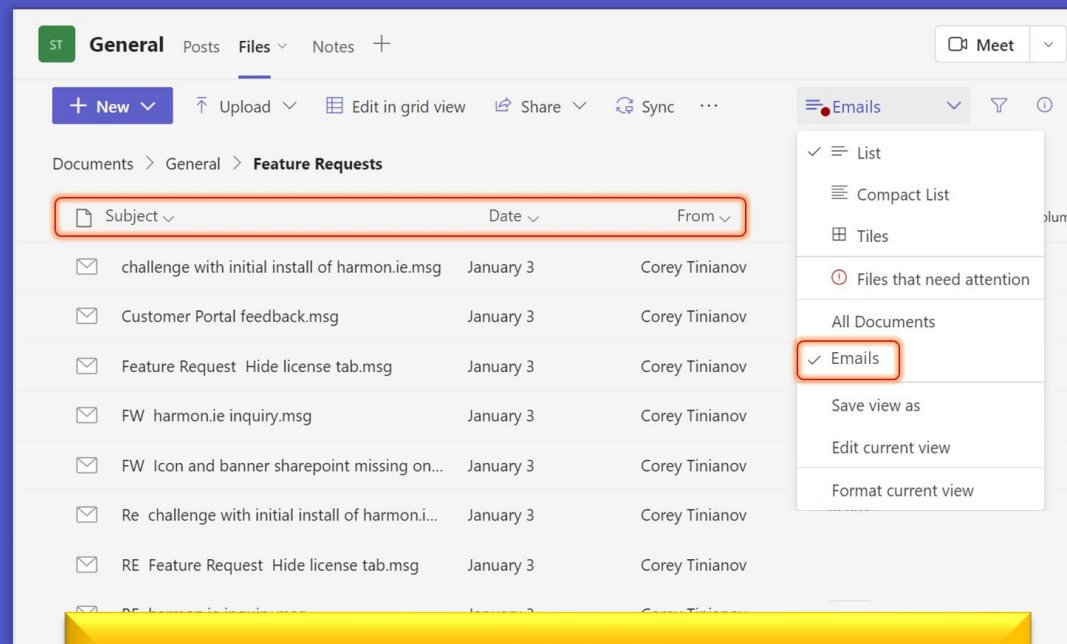
# Saving emails in Teams

Save emails to Teams from Outlook with harmon.ie

Email view automatically created with metadata



Drag and drop **email** to a channel



Select email view in channel files

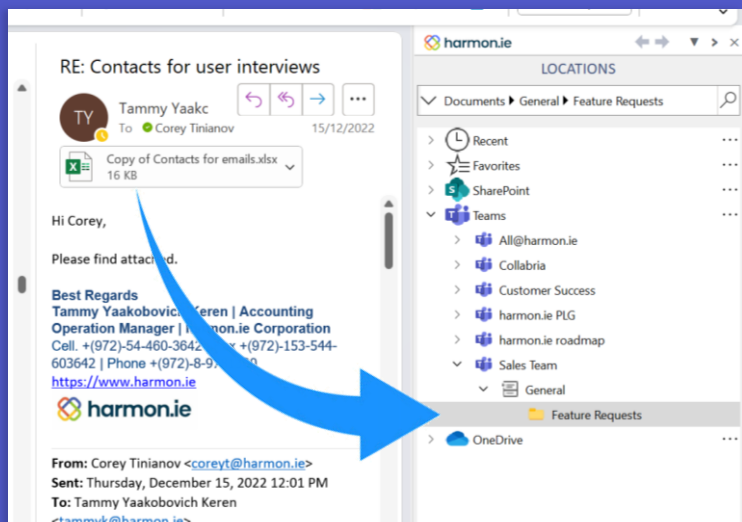


# Attachment metadata in Teams

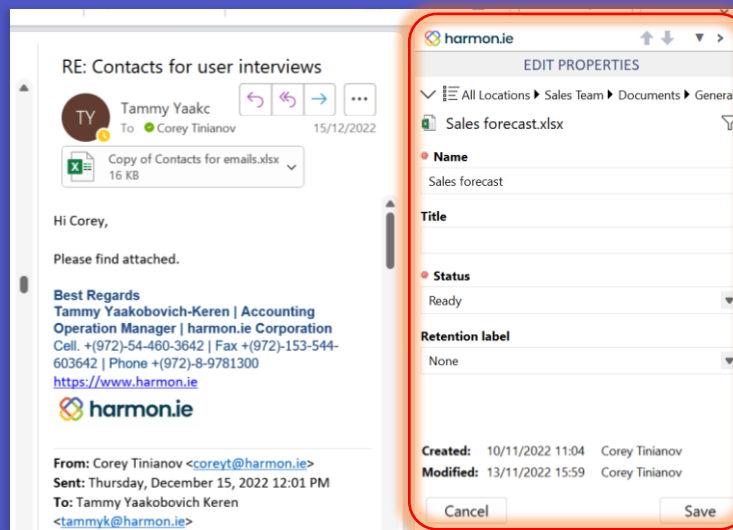
Save files to Teams from Outlook with harmon.ie

Edit metadata directly through harmon.ie

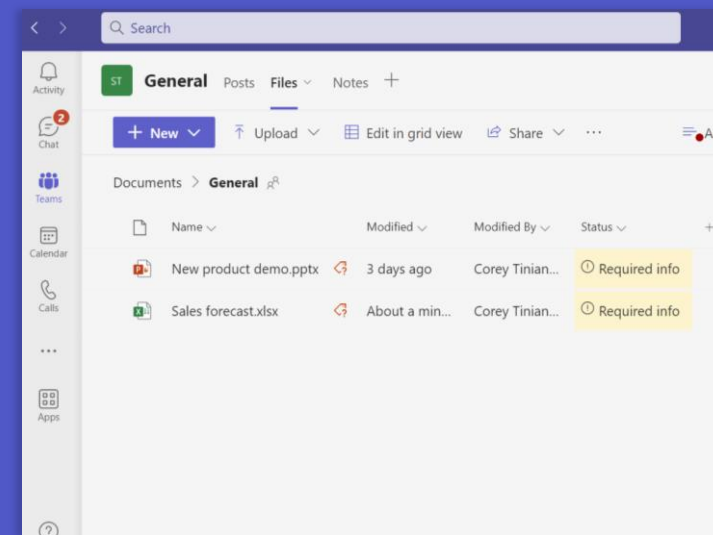
View in Teams files tab



Drag and drop **file** to a channel



Open property editor



Metadata applies in Teams

# The new harmon.ie for the new Teams challenge

Joint announcement on Dec 13<sup>th</sup>, 2022

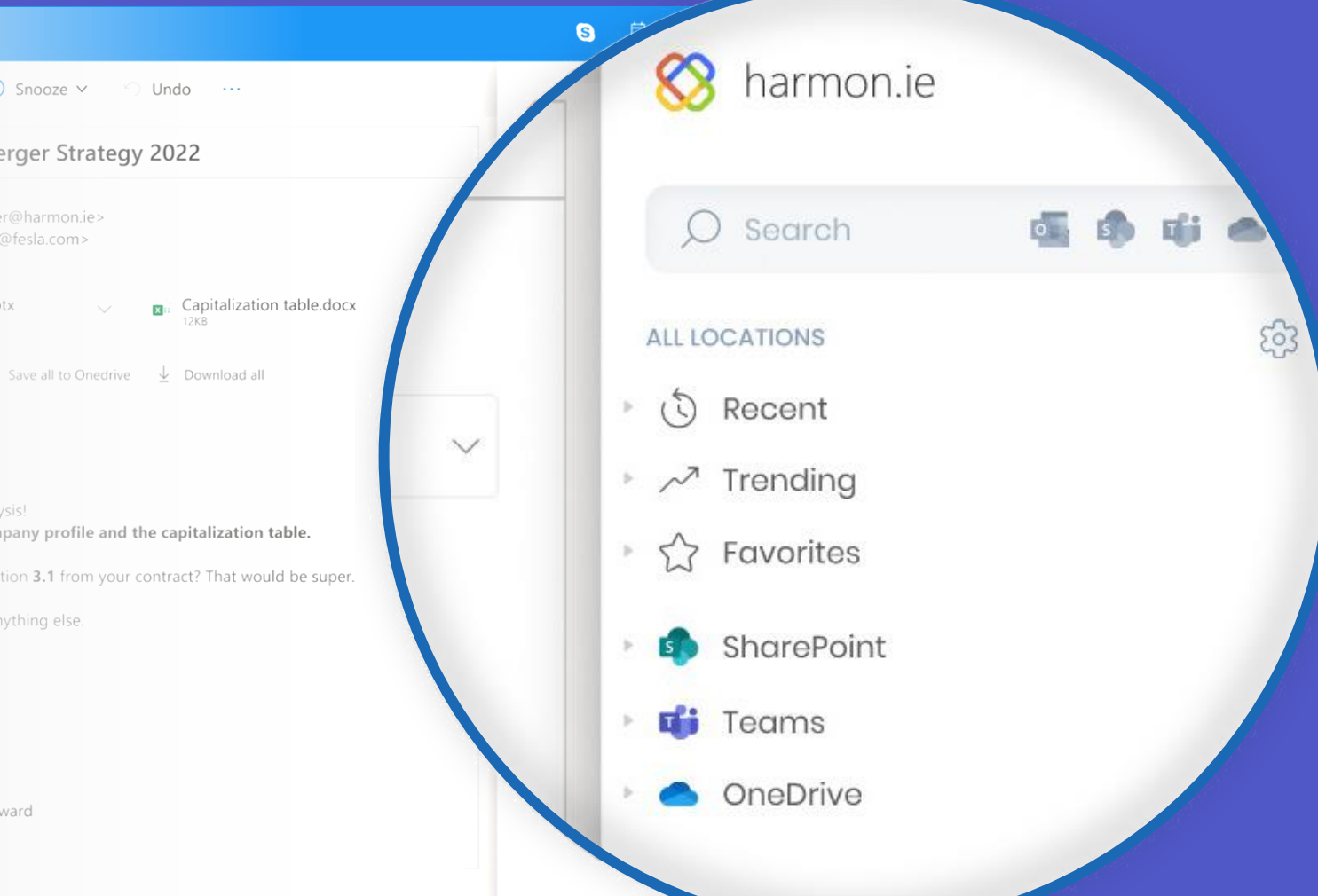


**“We are working with the  
most successful ISVs’ in  
the COM model like  
**harmon.ie**”**



JUAN BALMORI  
MICROSOFT PRINCIPAL





# Work faster, see everything in one place

**Search** across apps

**Recent** across apps

**Shared with Me** across apps

**Favorites** across apps



# Chat & Meetings Files

The screenshot displays the Microsoft Outlook application interface. The top navigation bar includes 'Home', 'View', and 'Help' tabs, along with a search bar and various action icons. The main content area is divided into three panes:

- Left Pane (Navigation):** Shows a list of folders and items, including 'Favorites (yaacovc@harmonie)', 'Inbox (35447)', 'MyInbox (1)', 'Drafts (44)', 'Sent Items (7)', 'Scheduled', 'Deleted Items (28445)', 'Junk Email (34305)', 'Archive (17)', 'Notes (147)', 'Clutter (23)', 'Conversation History', 'Inbox Low (8681)', 'Junk', 'RSS Subscriptions', 'ToDo (1)', and 'Groups'. There is also an 'Add account' button.
- Center Pane (Email Thread):** Displays an email conversation. The selected email is from 'Tal Shalom' with the subject 'Teams or SharePoint.pptx'. The thread includes messages from Ole Morten Støbbak, Zachary Mootz, Figma, Ravenwood Sales Team, Tal Shalom, Corey Tinianov, Lachlan Henderson, Jean-Michel Piat, and Sarah Jacob. The current email body contains the text: 'Please see the attached' and 'Start reply with: Thank you! Received, thank you.' with a 'Got it, thanks!' button.
- Right Pane (Navigation):** Shows 'ALL LOCATIONS' and 'Favorites' (with a message: 'No favorites yet. Click the star icon next to any file or location and it will show up here.'). Below this are sections for 'Recent', 'Shared with me', and 'Teams'. Under 'Teams', there are several chat and meeting entries: 'Organize Files in Teams\_3', 'SWOOP-Great-Digital-Teams', 'harmonie Advantage 2023', 'Joshua\_Polsky\_Head\_of\_B2...', 'manifest.outlook.staging', 'A/P Approval Team', 'All@harmonie', 'Collabria', 'Customer Success', 'harmonie & Orangutech', 'harmonie Management Team', and 'harmonie PLG'.

The bottom of the screenshot shows the Windows taskbar with the system tray displaying '7°C מעון רב היום' and the date '15/02/2023'.



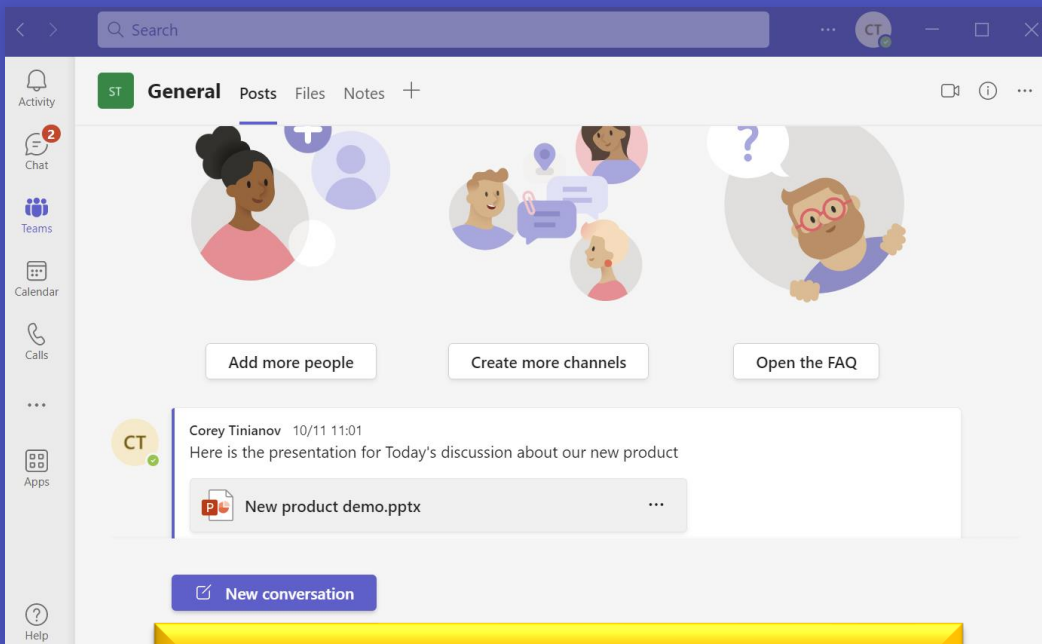
# On-hover Preview

The screenshot displays the Outlook application interface. The top navigation bar includes 'Home', 'View', and 'Help' tabs, along with a search bar and a 'New Outlook' toggle. The left sidebar shows the 'MyInbox' folder selected, with a list of sub-folders and their respective counts. The main email list shows several messages, with the selected message from 'Tal Shalom' highlighted. The preview pane on the right shows the email content, including the subject 'Teams or SharePoint.pptx', the sender 'Tal Shalom', and the body text. An on-hover preview is visible over the email content, showing a preview of a Teams meeting titled 'Organize Files in Teams...' with a thumbnail image and a timestamp of 'Wed Feb 15 2023 10:07:44'. The bottom of the screen shows the Windows taskbar with various application icons and the system tray.



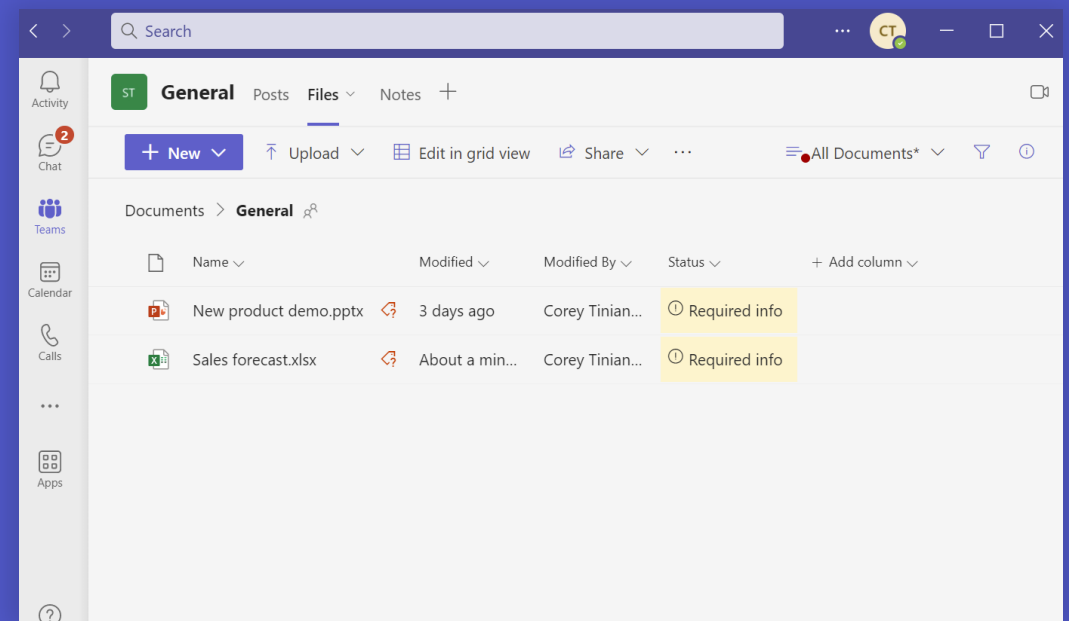
# The Teams dilemma: Collaborate or Classify

## Posts Tab



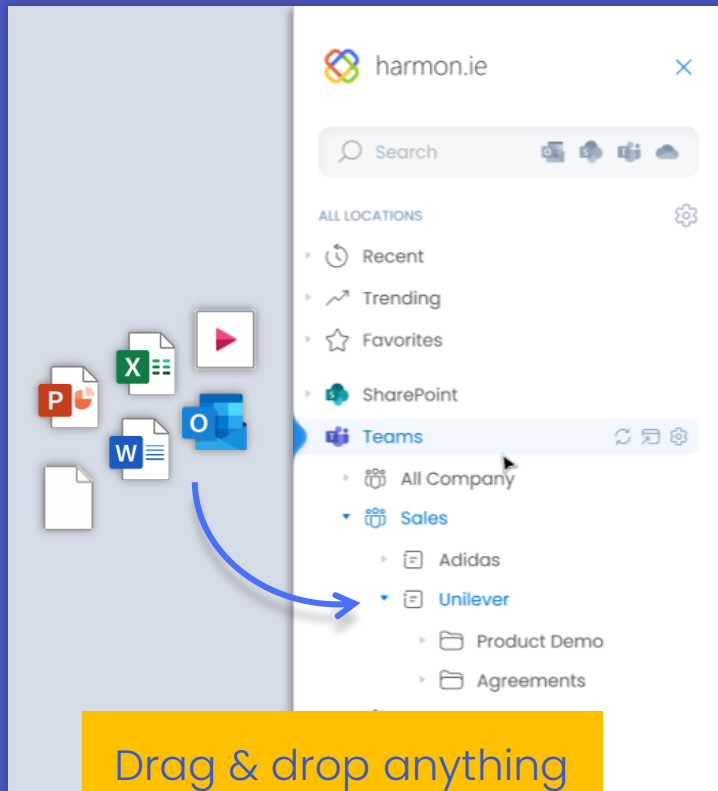
Share, organize later

## Files Tab

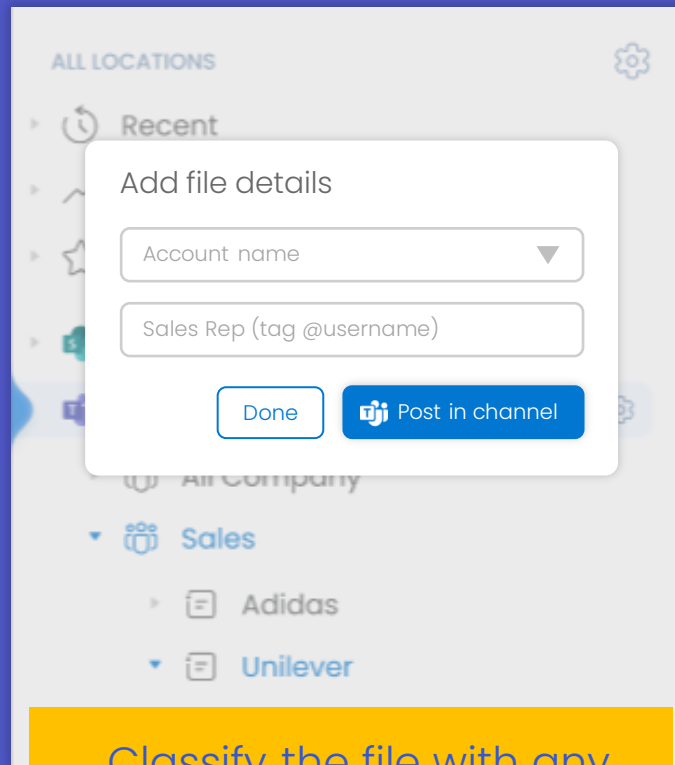


Classify, share later

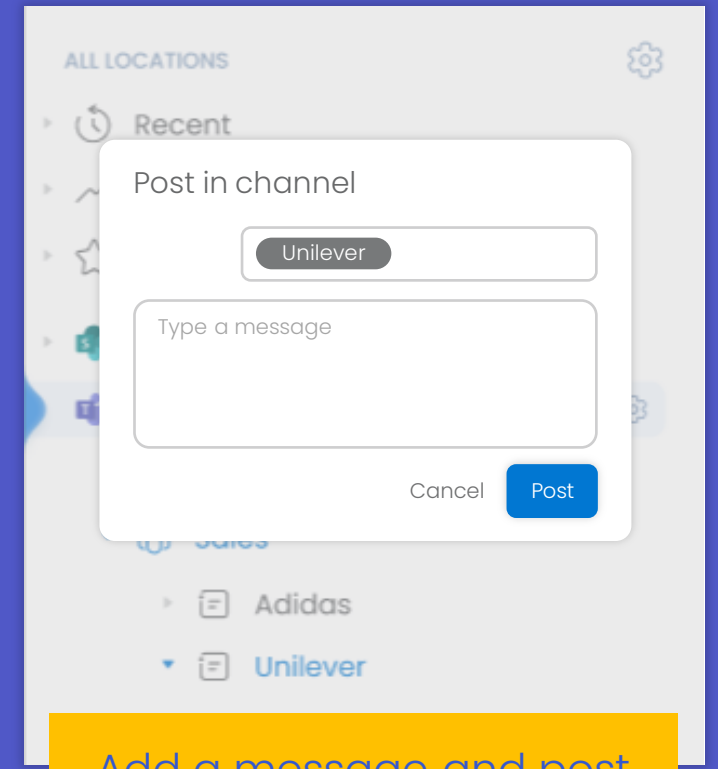
# Classify & share in Teams from one place



Drag & drop anything to a Teams Channel



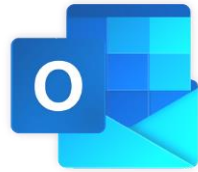
Classify the file with any metadata



Add a message and post to your Teams channel



# Easy to manage and provision



## **One harmon.ie for all Outlook apps**

The same add-in will work with One Outlook, desktop, web, mobile and mac apps.



## **Easy to install, provision and update**

Fast & secure installation and provisioning through Microsoft AppSource. Automatic updates.



# Single Page Architecture

## Security and Privacy

Organization data never leaves the organization MS 365 tenant

## Performance

Minimize round trips with server, most of the logic in client

## Ease of installation

Provisioning through Microsoft App Source or through organization tenant

## Ease of maintenance

Automatic update according to organization policy

## Portable architecture

Run on Teams, Outlook Mobile, Outlook Web, Outlook Desktop and One Outlook



# Information Management for Microsoft Teams



**Outlook** | Outside communicate tool

**MS Teams** | Drives better collaboration

**Harmon.ie** | Brings them together





