



# SharePoint Surgery

Top 10 harmon.ie Features



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CTO EMEA

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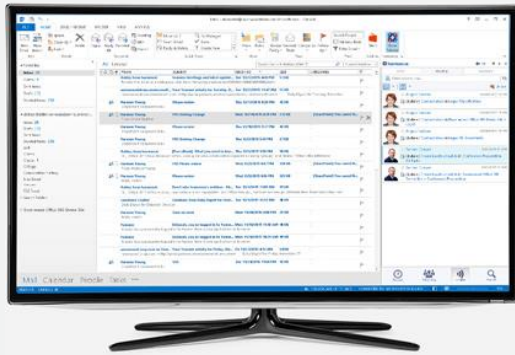
🐦 @rtpoole

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in <https://uk.linkedin.com/in/richard-poole-55a572>

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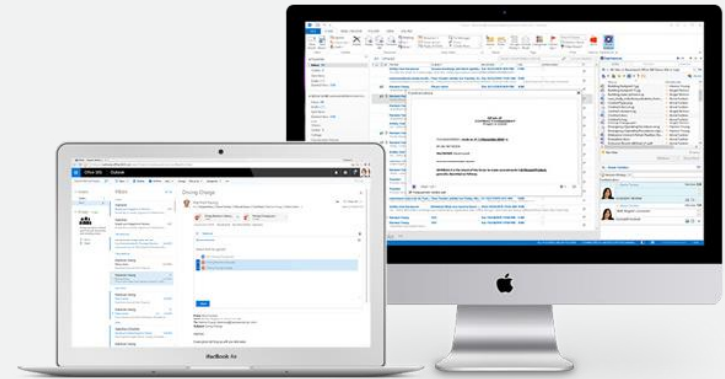
# harmon.ie Editions



Outlook



Mobile Apps



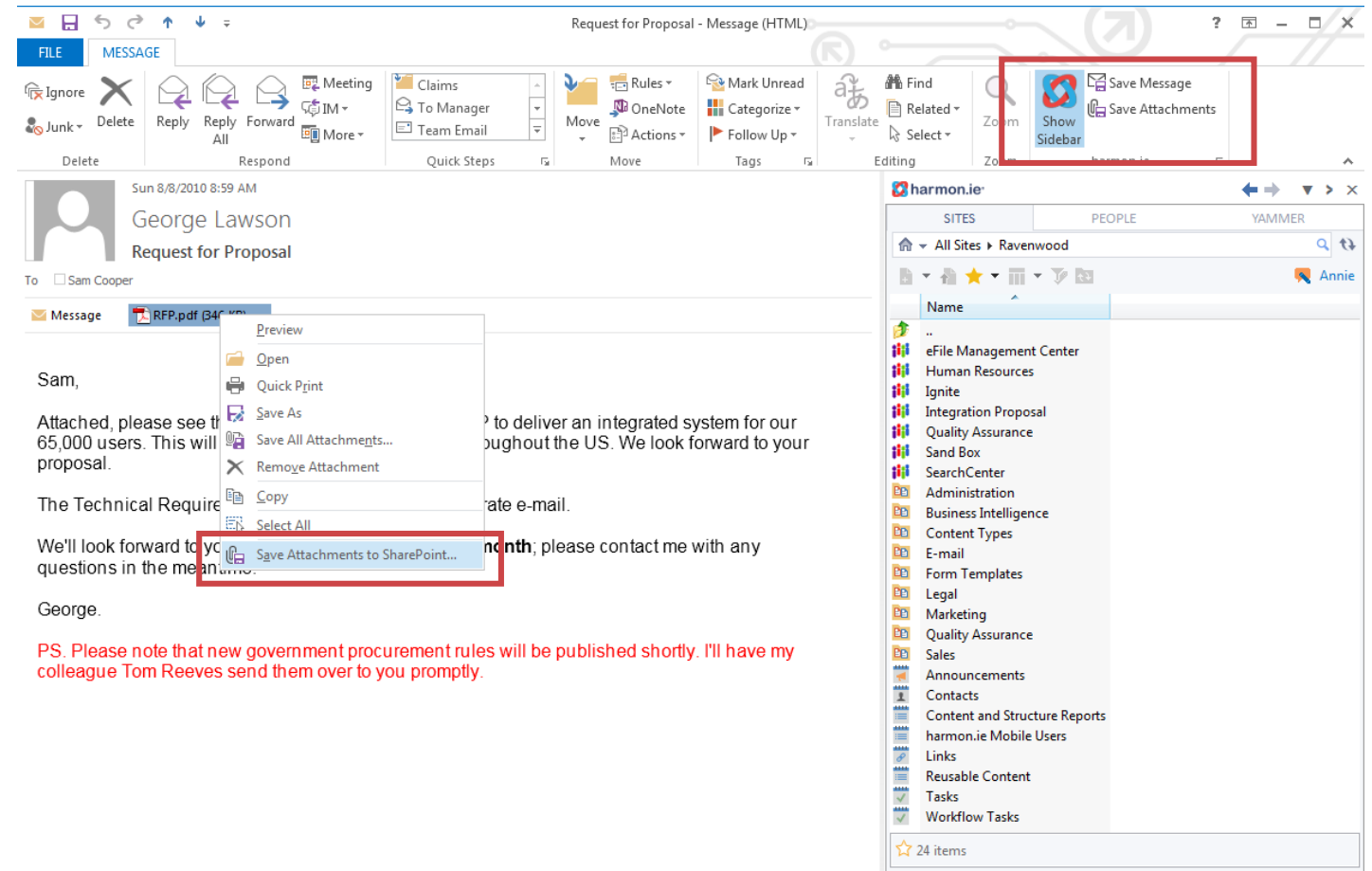
App For Office

# Going beyond “Drag & Drop”

1. Other ways to capture e-mails and documents
2. Be informed when new documents are added or updated
3. Sending and sharing documents
4. Capture updated documents
5. Organise content intuitively
6. Access content from Office
7. Work with other lists
8. Access content from multiple locations
9. Change your harmon.ie start-up view
10. At the end of the day...

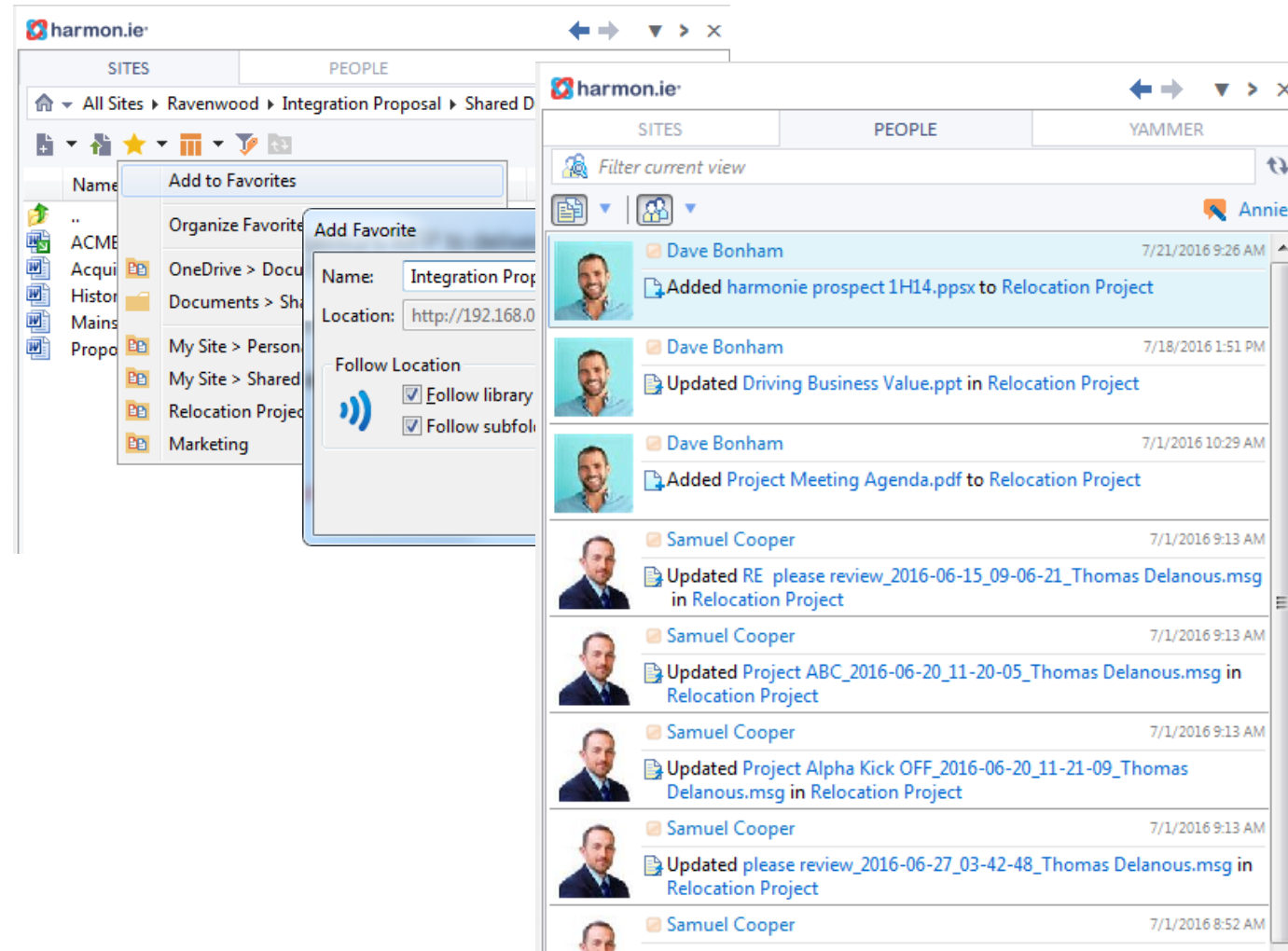
# 1. Other ways to capture e-mails and documents

- Drag & drop e-mails and attachments
- Save attachments to SharePoint
- Ribbon controls
- Drag and drop documents from Windows Explorer



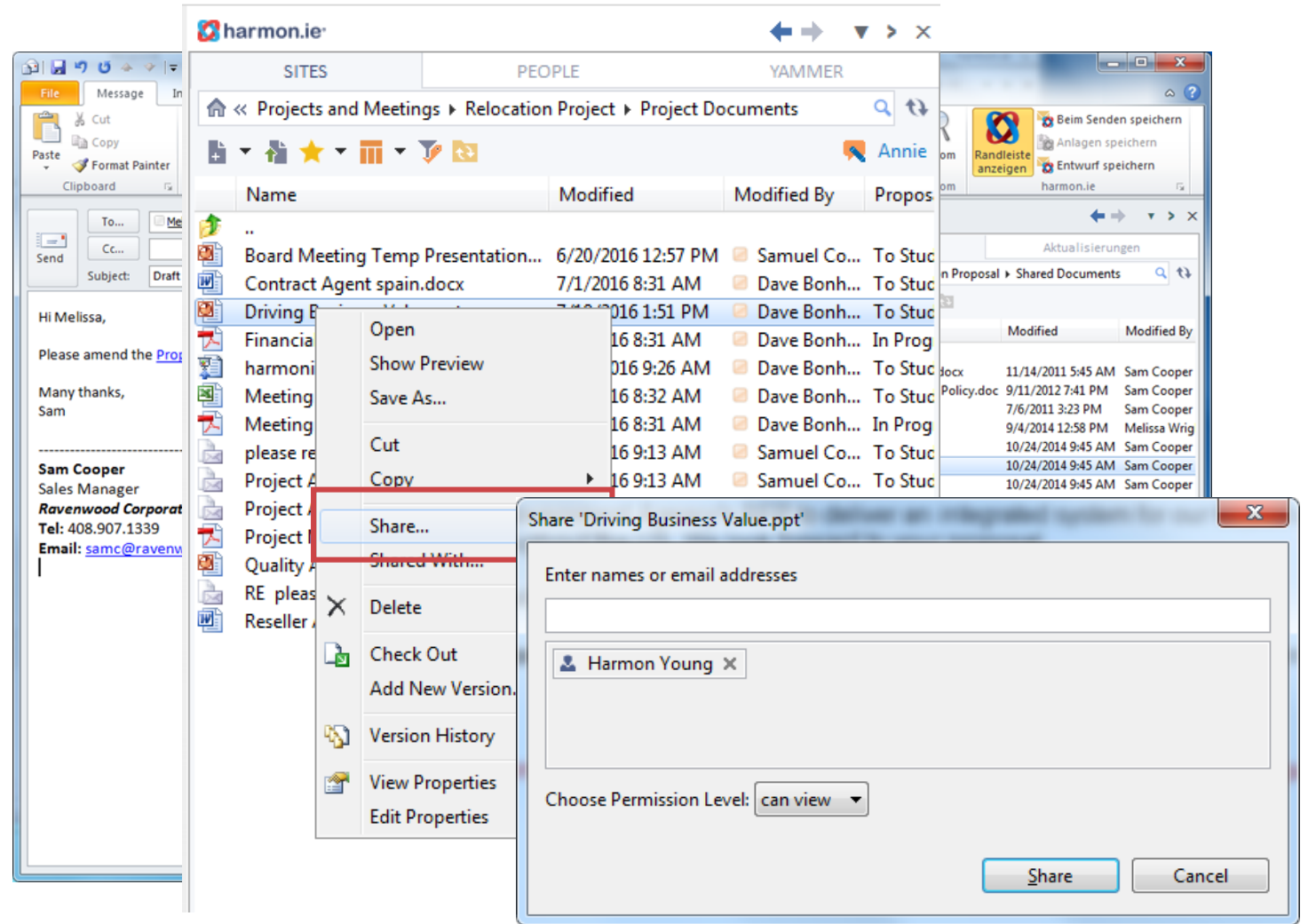
## 2. Be informed of new updates

- Add to Favourites
- Follow locations
- Filter activity
- View updated items



# 3. Sending and Sharing documents

- Send links
- Send attachments
- Share documents from OneDrive and SharePoint
- Check if recipients have access to links



# 4. Capture updated documents

- Receive updated documents as attachments
- Upload to SharePoint as new version

The screenshot displays an Outlook window titled "RFP - Technical Requirements - Message (HTML)". The email is from George Lawson, dated Sun 8/8/2010 9:03 AM, and is addressed to Sam Cooper. It contains two attachments: "RFP - Technical Req.pdf (148 KB)" and "Proposal - George comments added.docx (271 KB)". The email body text reads: "Sam, Here are the technical requirements. George".

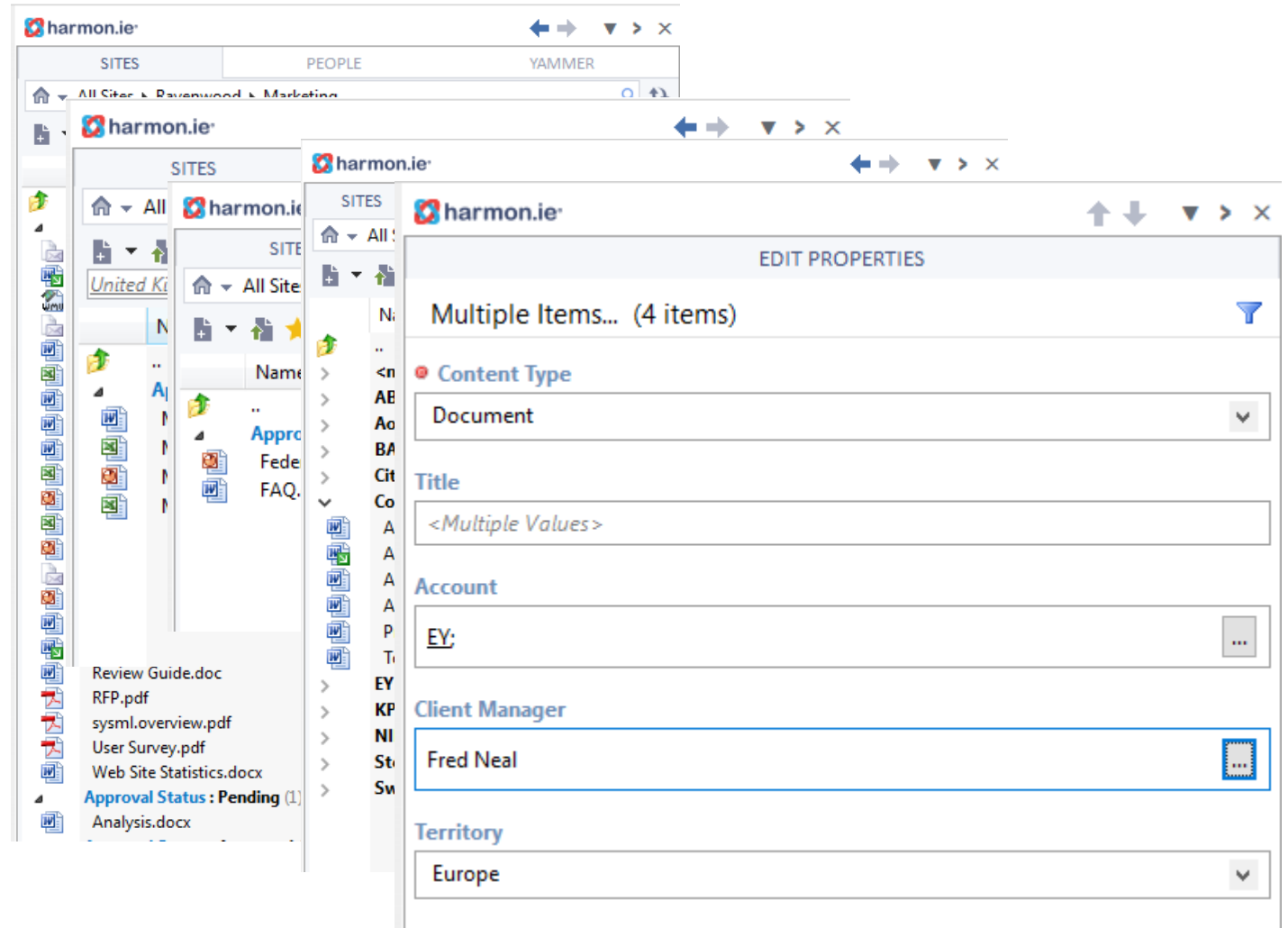
On the right side, a SharePoint sidebar for the "harmon.ie" site is visible. It shows a breadcrumb path: "Ravenwood > Integration Proposal > Shared Documents". A table lists documents with columns for Name, Modified, and Modified By. A red arrow points from the "Proposal - George comments added.docx" attachment in the email to the "Proposal.docx" entry in the sidebar. Below the "Proposal.docx" entry, a button is labeled "Add as a new version to Proposal.docx".

Name	Modified	Modified By
..		
ACME Quote-Word 2007.docx	11/14/2011 5:45 AM	Sam Co...
Acquisition Management Policy.docx	2/10/2014 12:41 PM	Melissa W.
History.docx	2/4/2013 9:54 PM	Sam Co...
Mainsoft Proposal Response.docx	2/4/2013 9:54 PM	Sam Co...
Proposal.docx	9/18/2015 6:53 AM	Melissa W.



# 5. Organise content intuitively

- Use SharePoint views
- Filter by tags and terms
- Filter by columns
- Automatically apply metadata
- Update metadata on multiple items at once



# 6. Access content from Office

- Word
- Excel
- PowerPoint
- Use harmon.ie favourites
- Office Apps

The screenshot displays the Microsoft Word interface. The main document is titled "Procurement Process.docx" and is in "Compatibility Mode". The ribbon shows the "Home" tab with various formatting options. The document content includes a section titled "Federal Procurement Process" with the following text:

Request for Proposal (RFP) -- required for purchases over \$100K or may also be used if product/service under consideration is highly technical in nature. In order to begin selling to the Federal gov't, you must first register your company at certain sites. Pre-requisites are

1. DUNS # (Dunn and Bradstreet)
2. TIN (Tax ID #)

**1) CCR (Central Contractors Registration)**

It is mandatory to register on CCR → all vendors must register at the CCR site in order to be awarded government contracts. Need your DUNS and TIN to start. [www.ccr.gov](http://www.ccr.gov)

**2) TPIN (Trading Partners Identification Number)**

Once registration on CCR is completed and submitted, you get a TPIN number. Keep this number safe. You'll need it in other sites.

**3) MPIN (Marketing Partners Identification Number)**

MPIN acts as a password and allows you to access many different sites. It is mandatory for all CCR registrations. Keep this number safe.

**4) CAGE CODE (Commerical and Government Entity)**

5 character identifier. Used extensively in the Federal government. Code is unique to a given company. **\*\* It must appear on every contract and every invoice. \*\*** It is used to identify your company for payment purposes.

The sidebar on the right, titled "harmon.ie for Office", shows a list of sites under "Documents". The "Sites" section includes:

- harmon.ie Office 365 Site
- Test Alex
- EMEA Team
- harmon.ie & Affecto
- Sales
- Marketing
- OneDrive

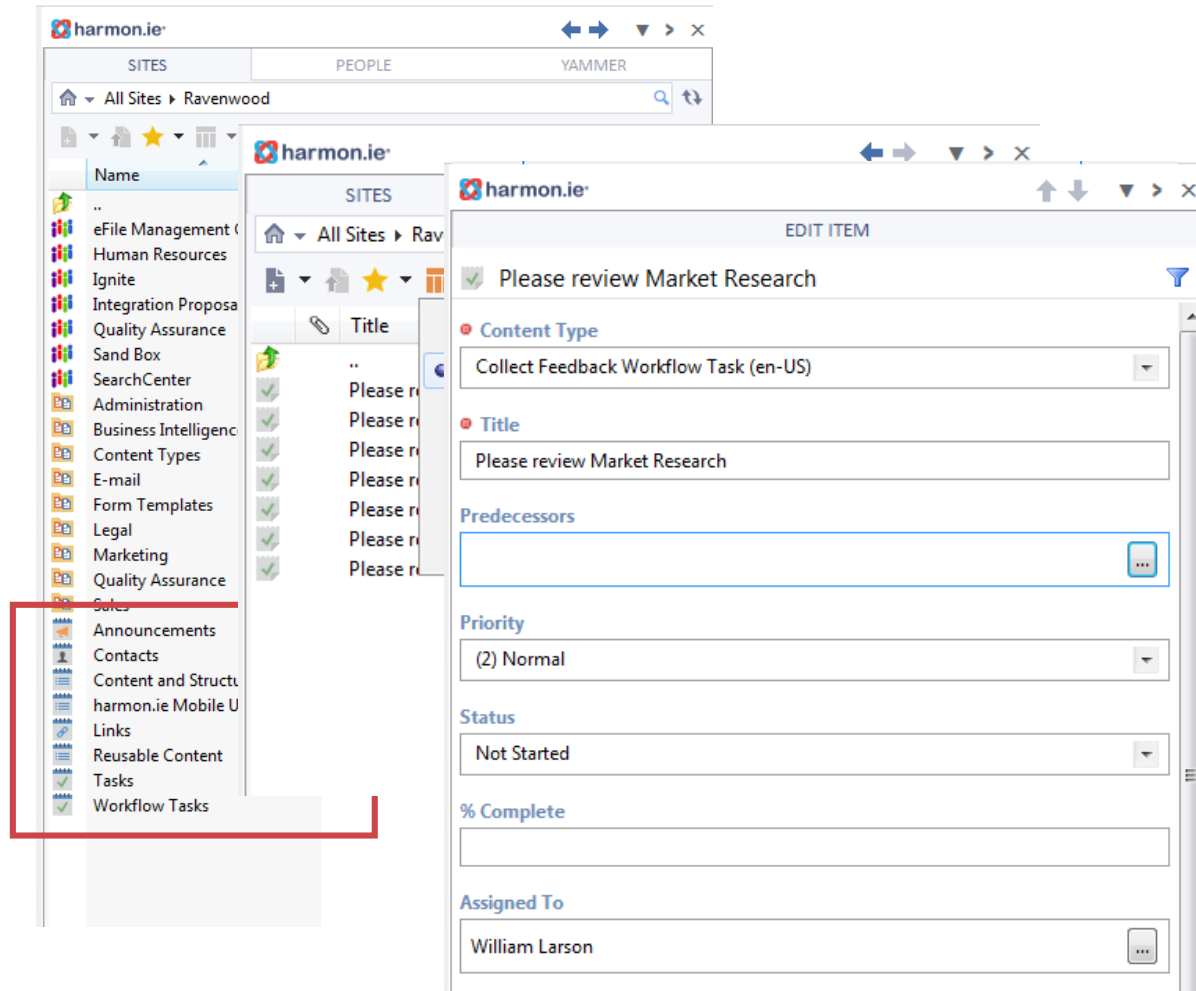
The "Sites I'm Following" section includes:

- DemoSite

The "Recent" section is currently empty.

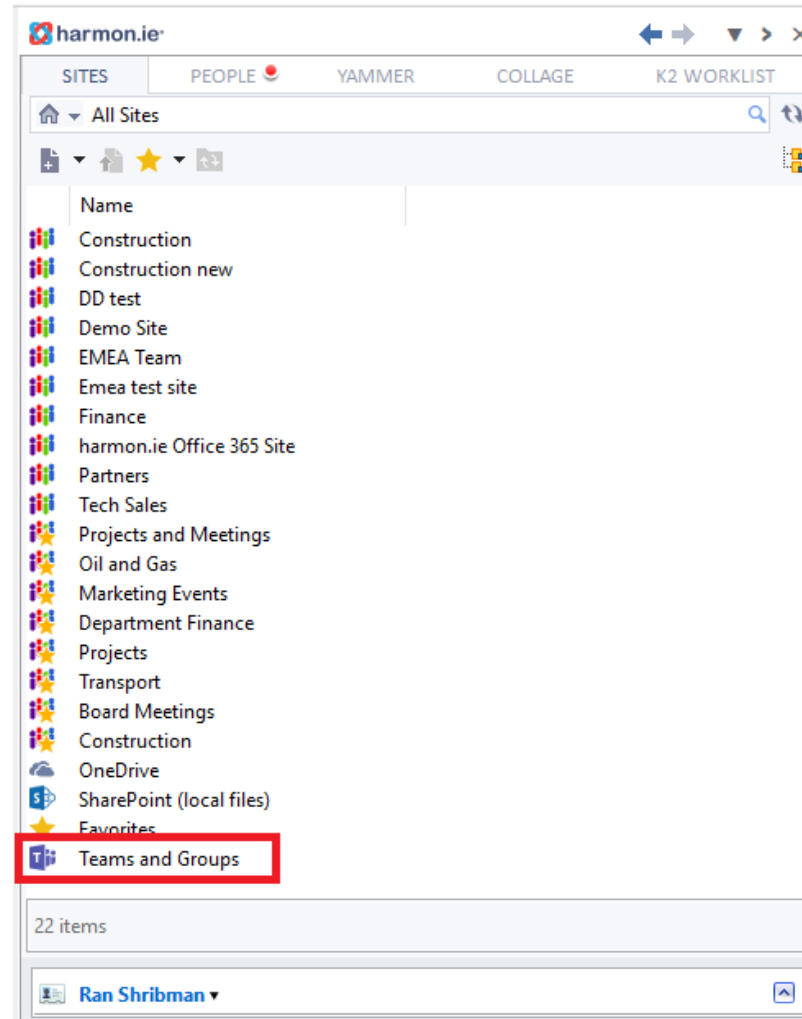
# 7. Work with other lists

- Task lists, Announcements, etc
- Views
- Edit properties
- Attach documents
- Follow for updates



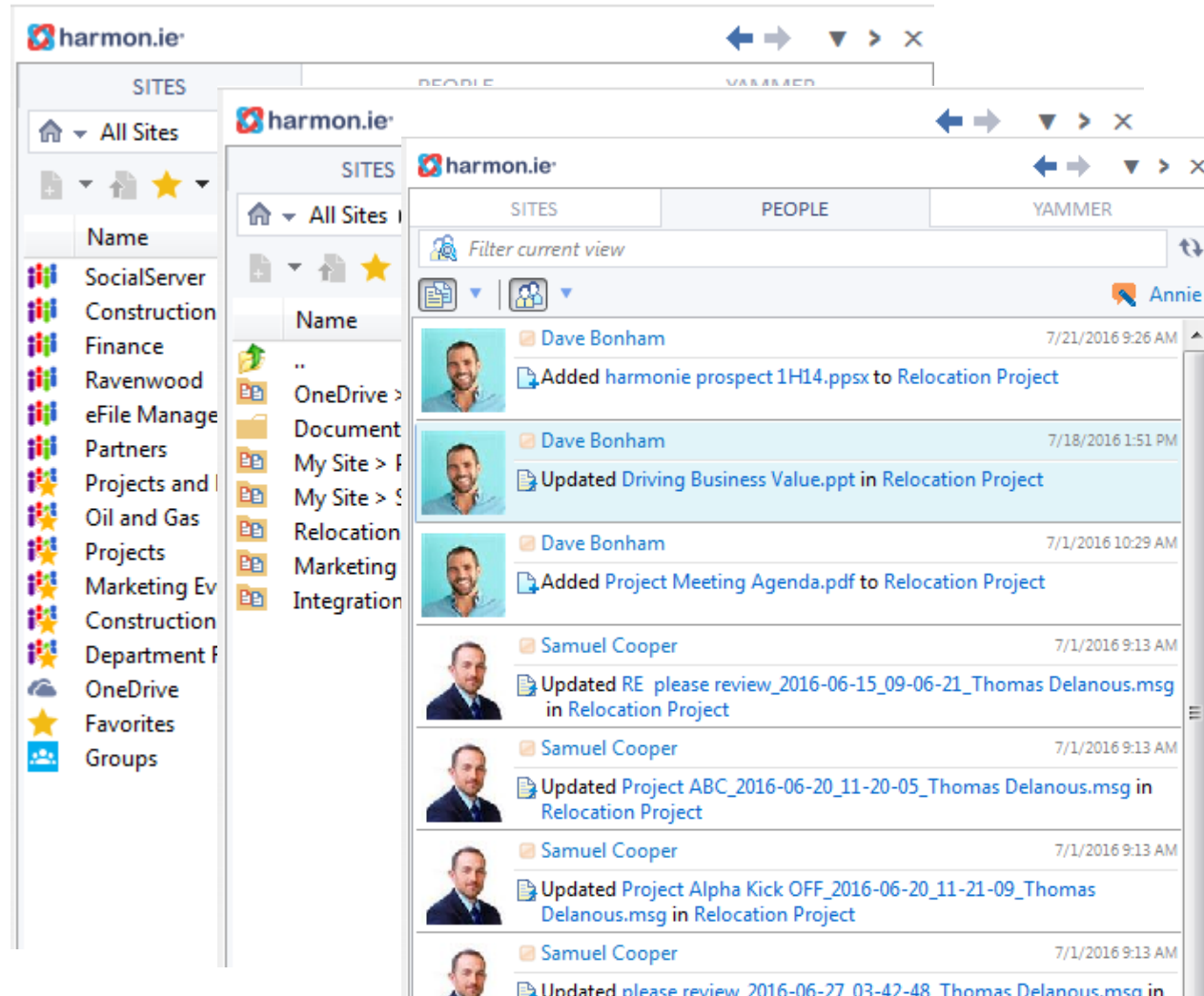
# 8. Access content from multiple locations

- Sites you're Following
- OneDrive
- Teams & Groups



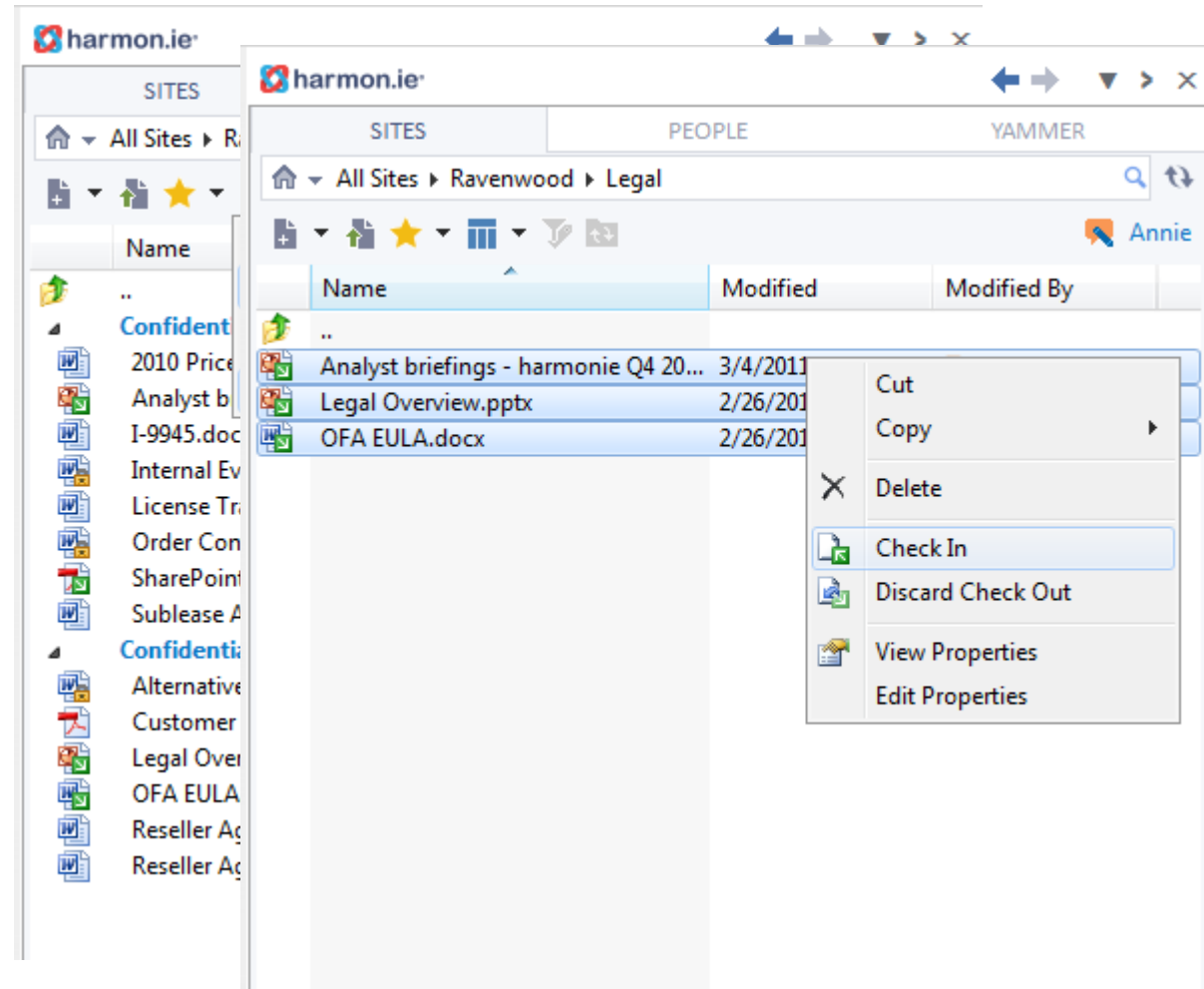
# 9. Change your harmon.ie start-up view

- Last used location
- All Sites
- Favourites
- Updates



# 10. At the end of the day...

- My Checked Out Documents view
- Check In to make available to other users



# Online documentation and videos

- User documentation

<http://harmon.ie/documentation/sharepoint/outlook/welcome>

- Training videos

<http://harmon.ie/SharePoint/Product/TrainingVideos>

Try harmon.ie Enterprise for yourself

<https://harmon.ie/enterprise-trial>

# Thank You