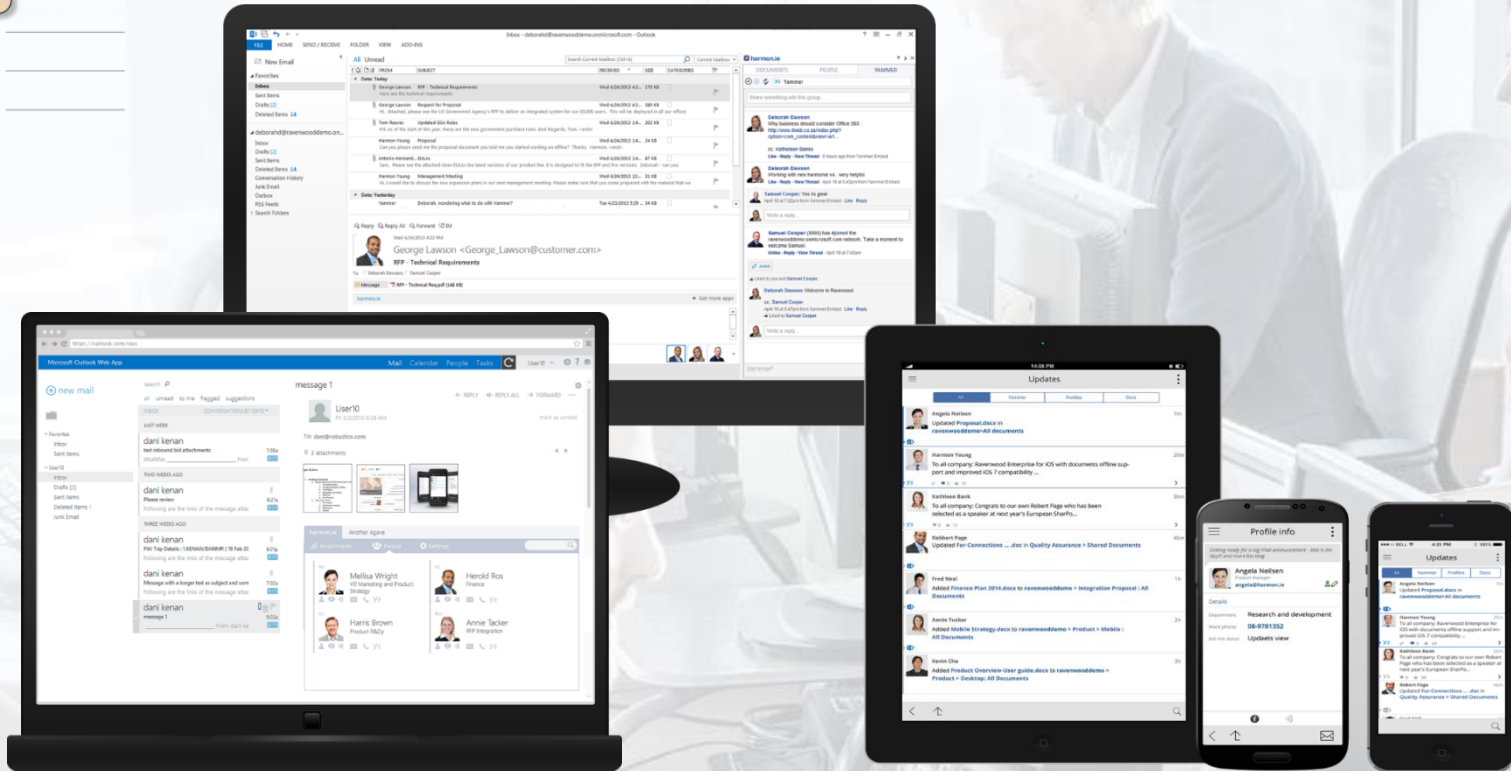




Focus on the UX

Key Strategies for SharePoint and Office 365






Richard Poole

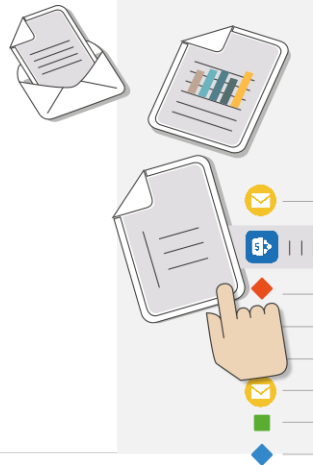
CTO EMEA

 richardp@harmon.ie

 +44 7733 296159

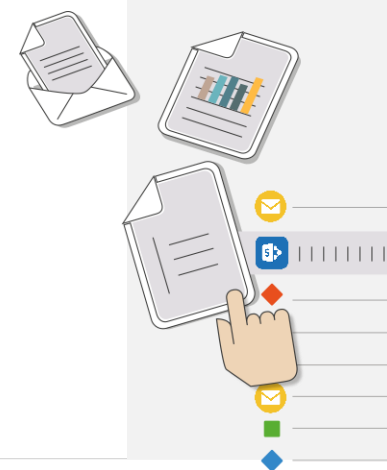
 @rtpoole

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

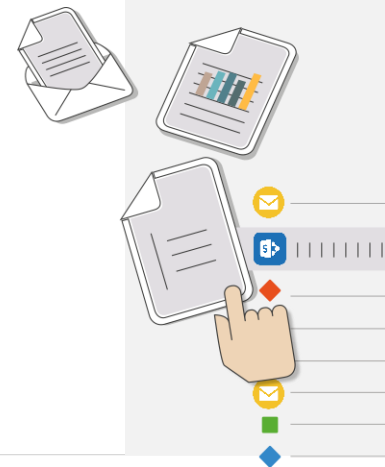


Fundamentals for Efficient Handling of Documents and Emails

1. Capture and store emails and documents together
2. Keep up to date with the correct information
3. Make it easy to share content with both colleagues and clients
4. Organise and categorise content so you can find it later
5. Differentiate and share personal, shared, and managed content
6. Re-use existing knowledge
7. Make sure other people can access your emails and documents



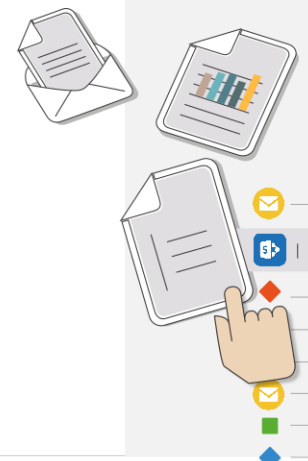
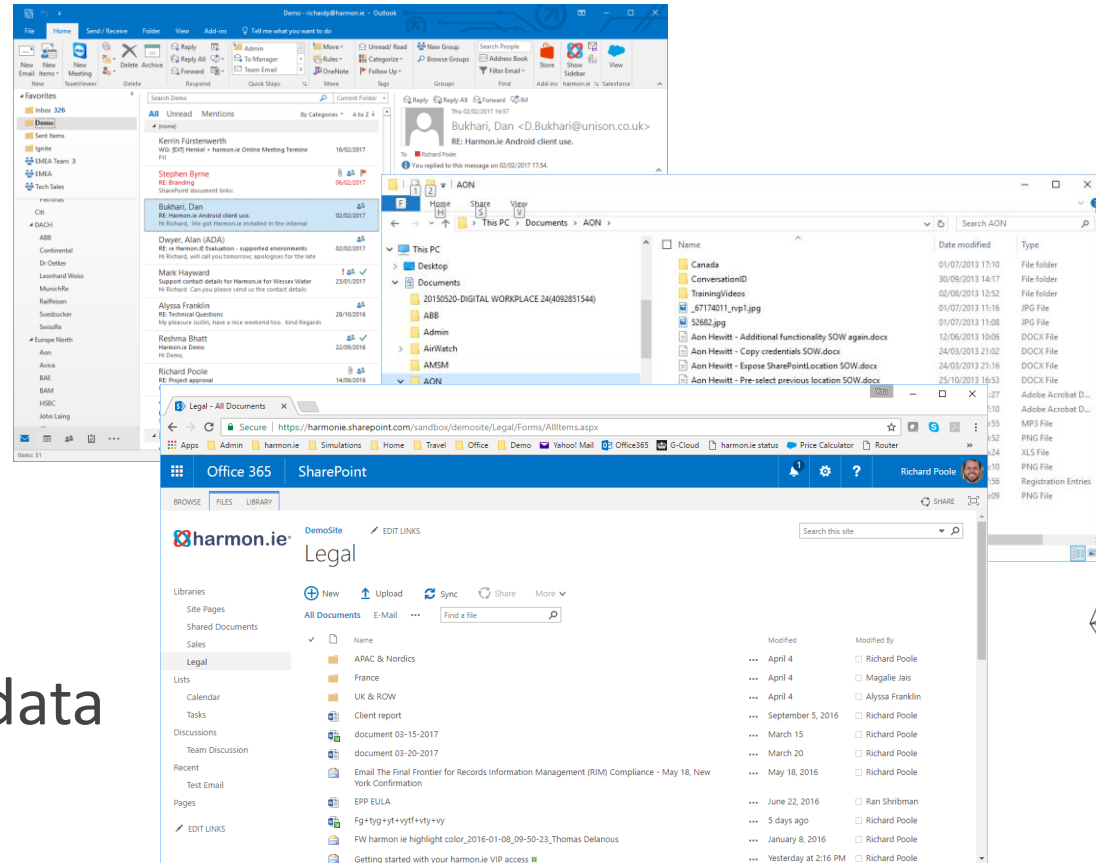
Capture and store emails and documents together



The Challenge

Disconnected Data

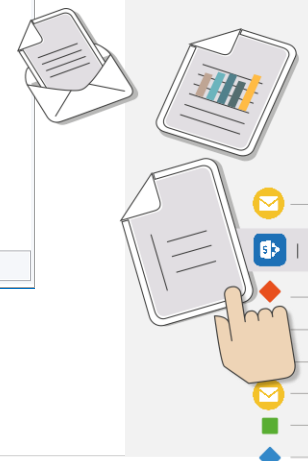
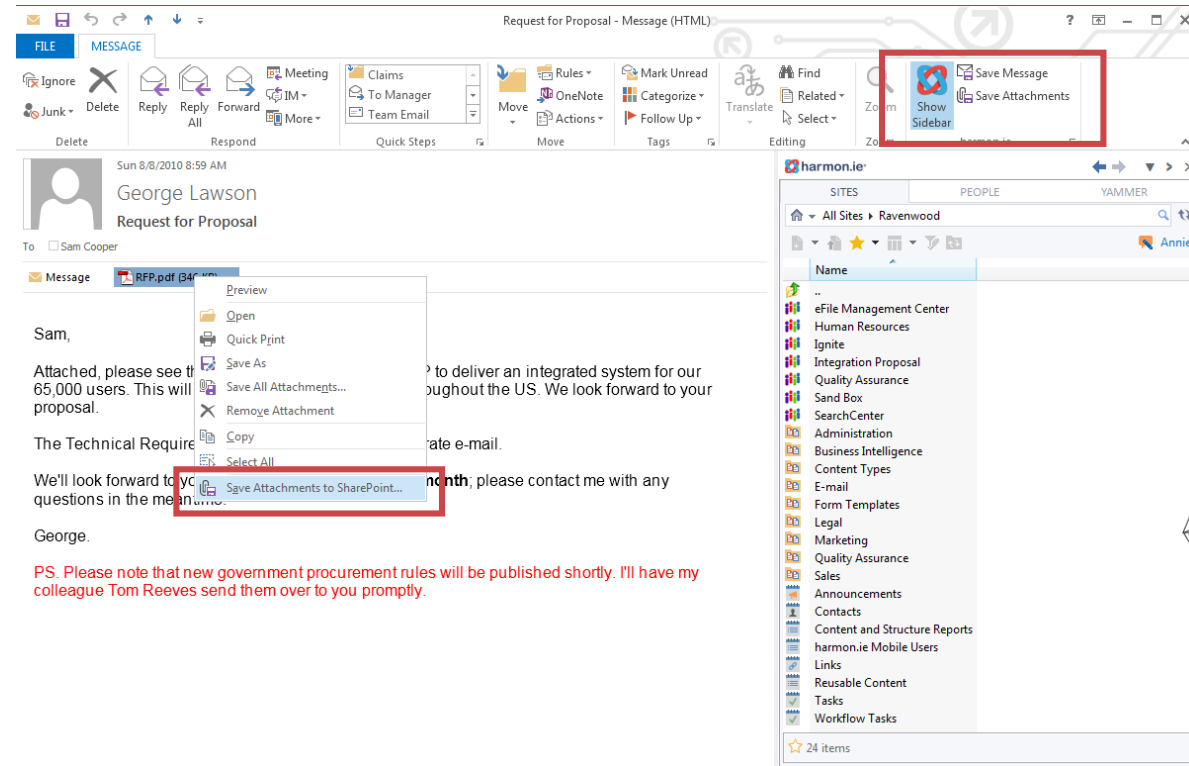
- E-mails in Exchange
 - Individual or shared mailboxes
 - Public folders
- Documents in silos
 - FileShares, SharePoint, etc.
- No consistent search, UI, metadata



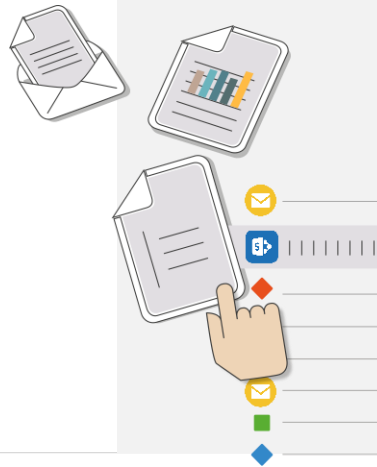
The Key

Manage Them Together

- Drag & drop e-mails and attachments
- Drag and drop documents from Windows Explorer
- Receive updated documents as attachments
- Upload to SharePoint as new version



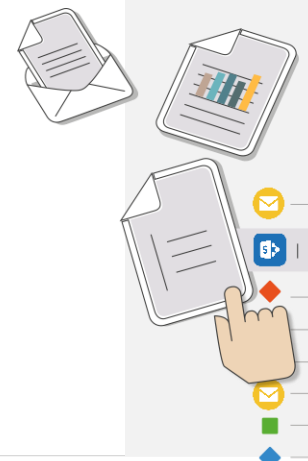
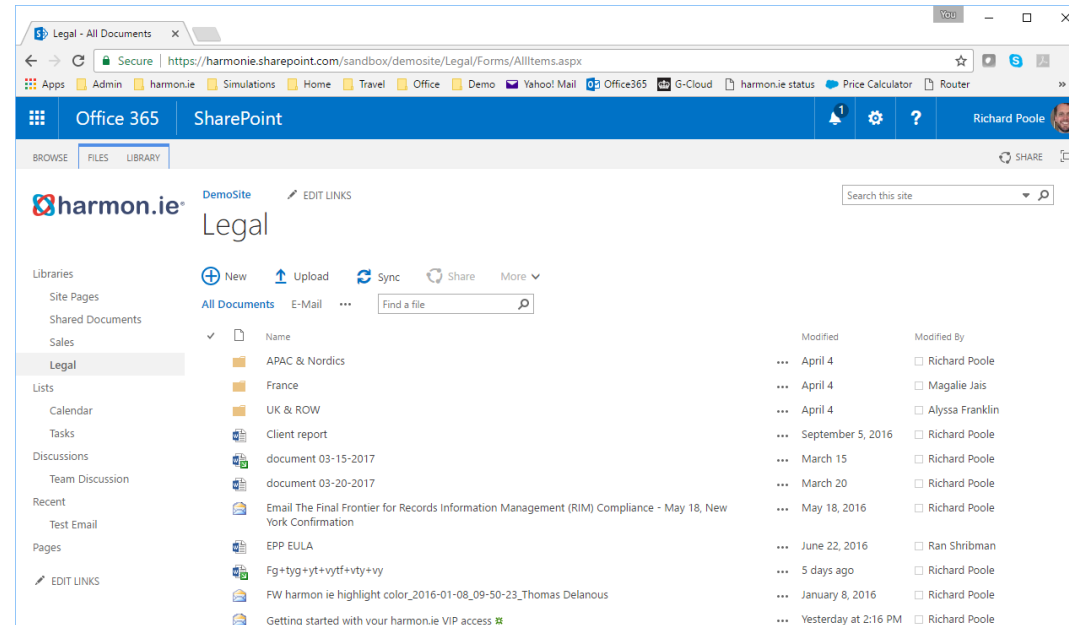
Keep up to date with the correct information



The Challenge

Know What You're Missing

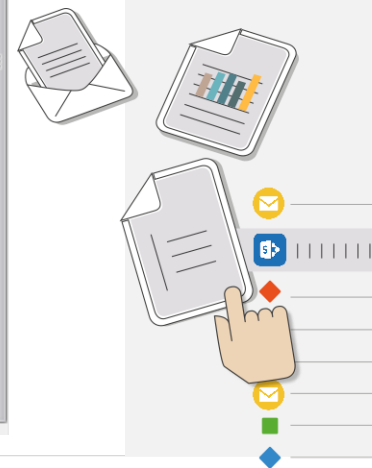
- Not knowing where to find what you are looking for
- Working with incorrect data
- No consistent search, UI, metadata



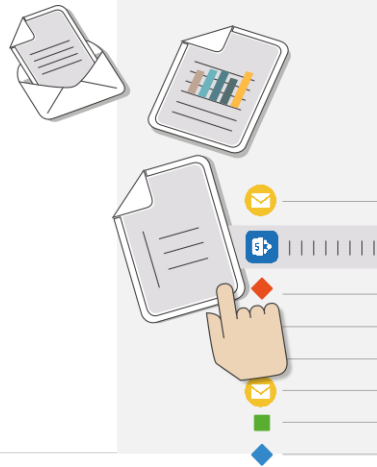
The Key Stay in the Loop

- Manage doc versions
- Follow content you are working on
- Be notified when important content is updated

The image displays two overlapping screenshots of the harmon.ie web application. The top-left screenshot shows a file browser interface with a 'SITES' tab. A dropdown menu is open, listing various locations such as 'OneDrive > Documents', 'Documents > Shared with Everyone', 'My Site > Personal documents', 'My Site > Shared Documents', 'Relocation Project', and 'Marketing'. The top-right screenshot shows a notification feed under the 'PEOPLE' tab. The feed lists updates from users like Dave Bonham and Samuel Cooper, including actions like 'Added harmonie prospect 1H14.ppsx to Relocation Project' and 'Updated Driving Business Value.ppt in Relocation Project'. The interface includes navigation arrows, a search bar, and a user profile for Annie.



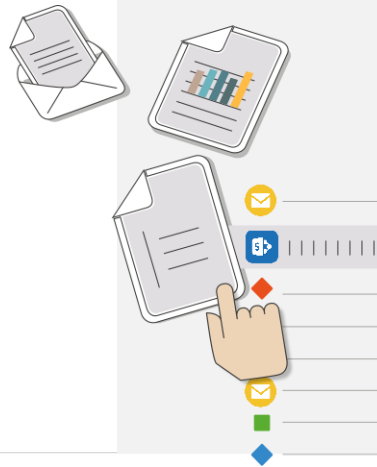
Make it easy to share
content with both
colleagues and clients



The Challenge

Getting Everyone on the Same Page

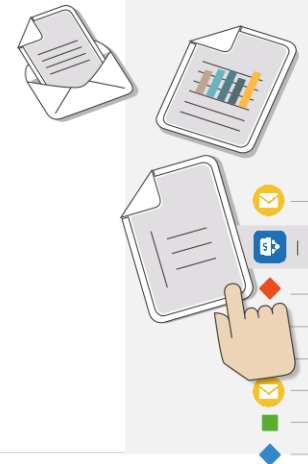
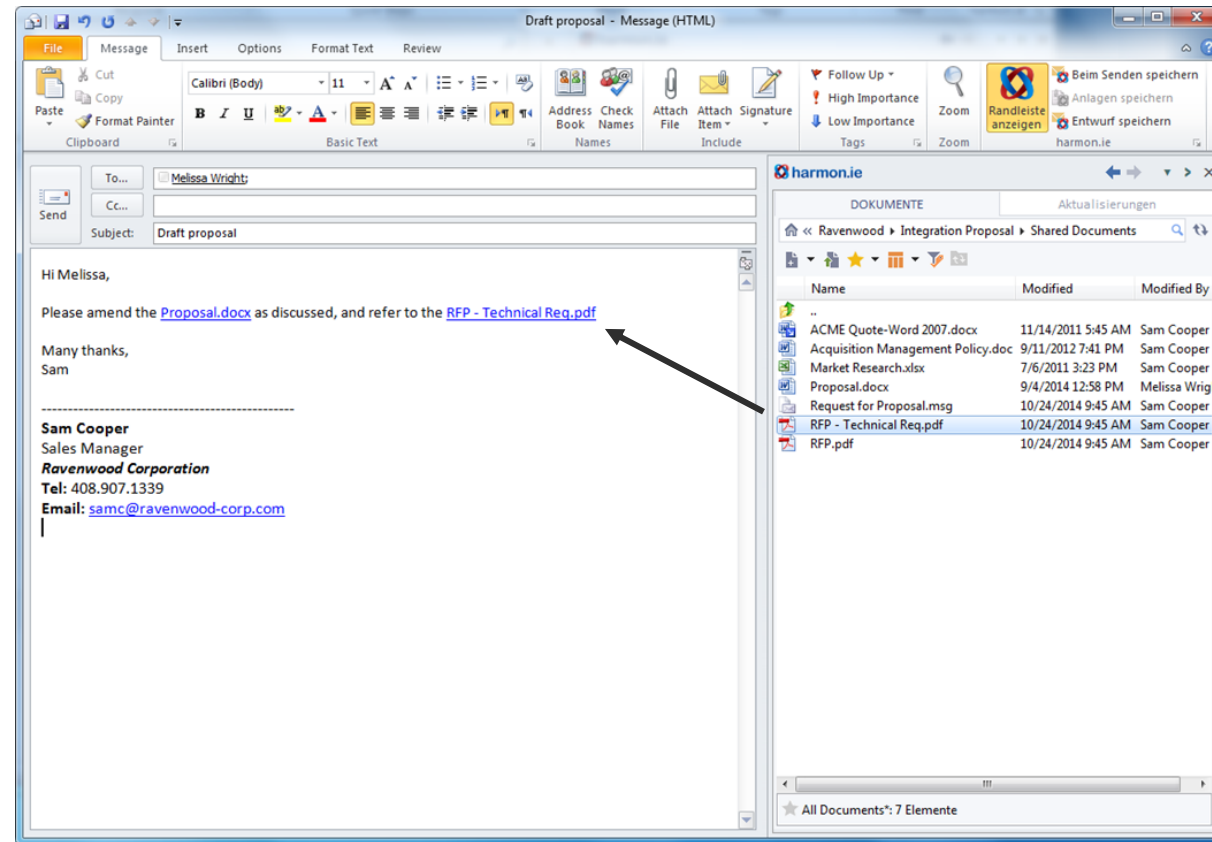
- Sharing content securely with internal colleagues
- What about external collaborators?
- And clients who have no access to your infrastructure?



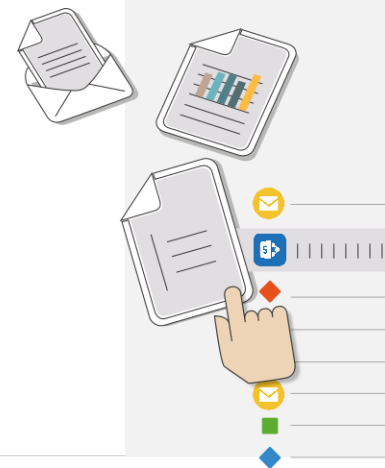
The Key

Grant Appropriate Access

- Send links
- Send attachments
- Share documents from OneDrive and Team Sites
- Check permissions



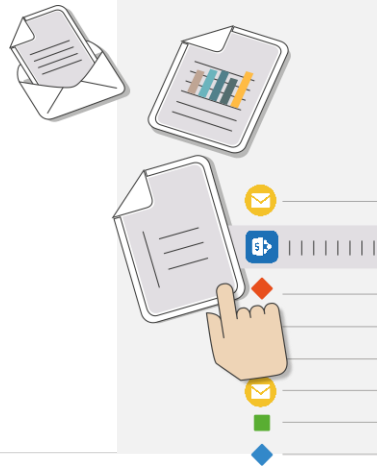
Organise and categorise content so you can find it later



The Challenge

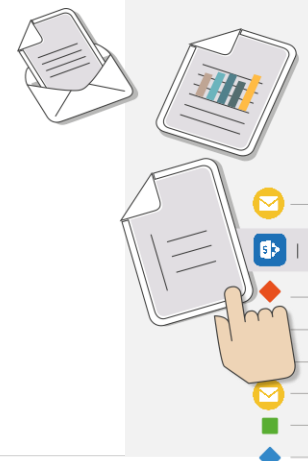
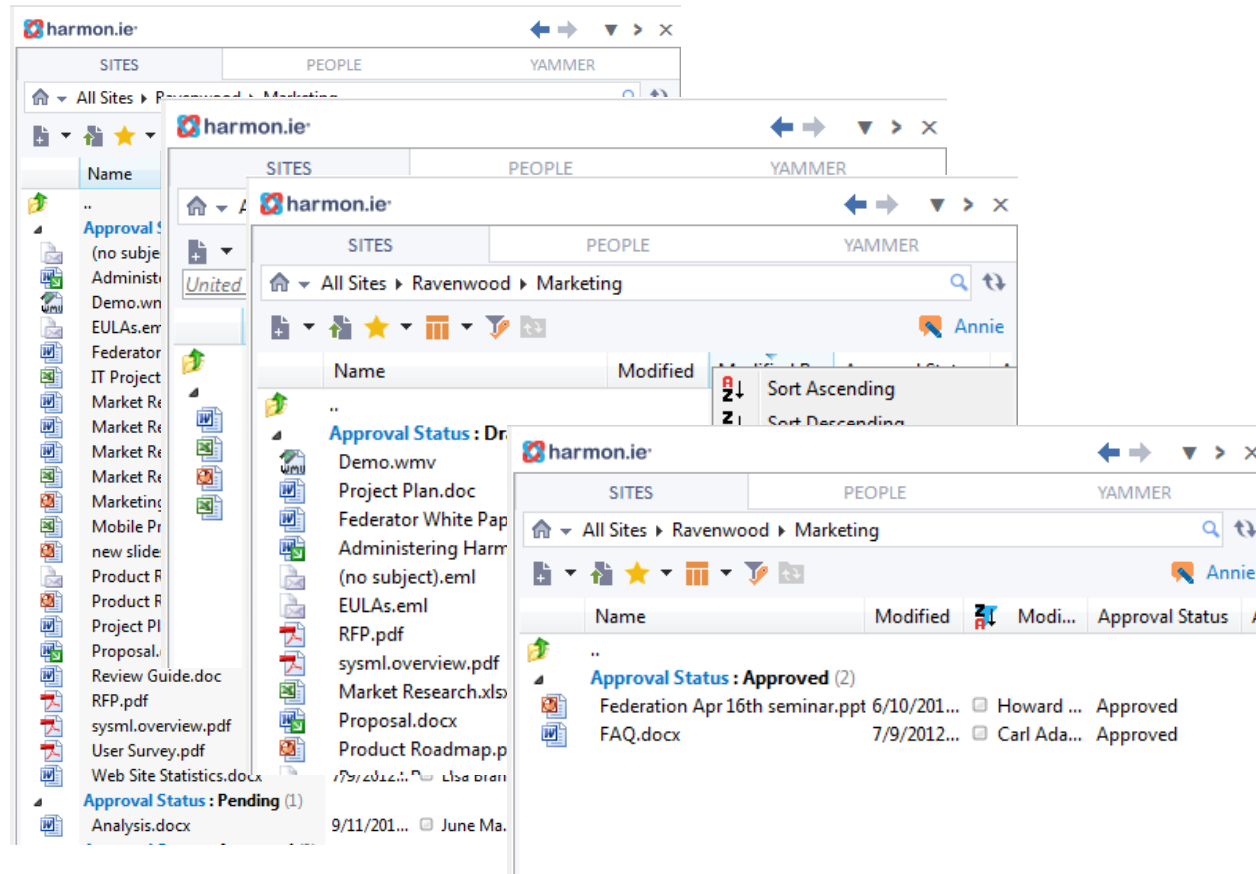
Too Many Barriers

- Users don't see value in metadata
- Users avoid entering metadata if it is at all challenging
- Updating metadata on multiple items is painful
- Users can't navigate and find content easily



The Key

- Automate metadata that already exists
- Make it as easy as possible
- Use SharePoint views
- Filter by tags and terms
- Filter by column



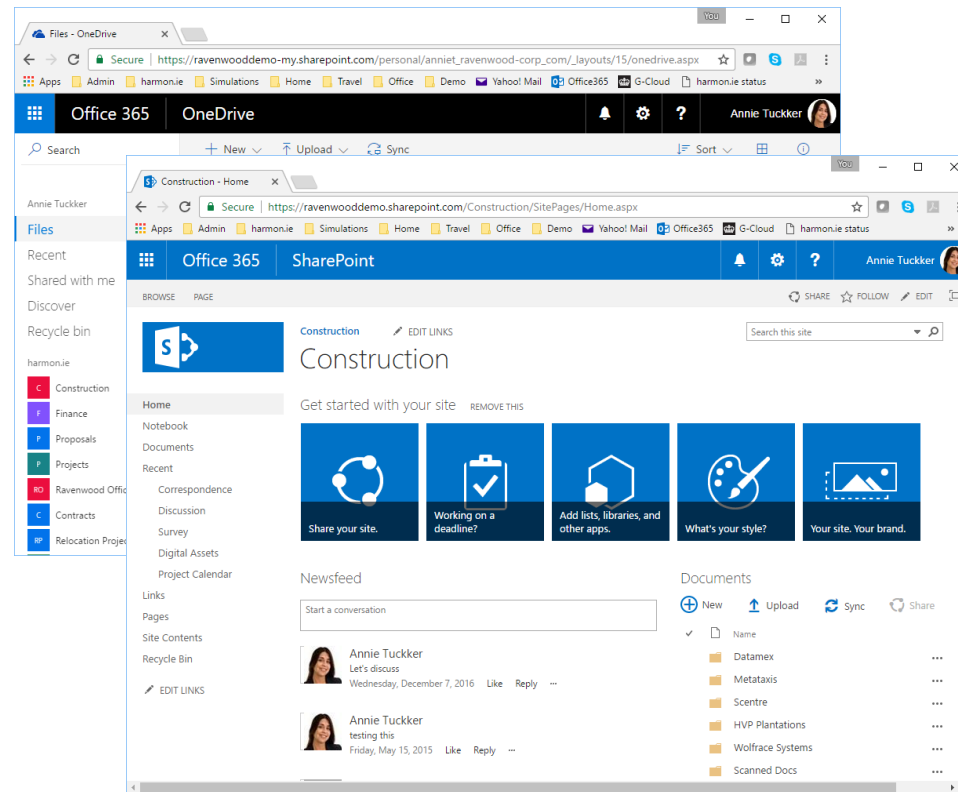
Differentiate between (and share) personal, shared, and managed content



The Challenge

When to use OneDrive, Groups, & Team Sites

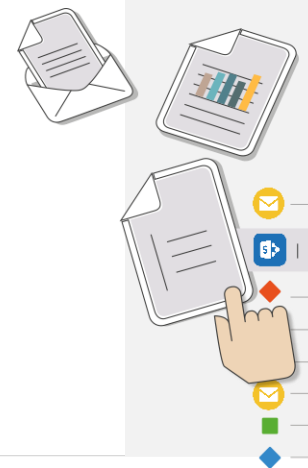
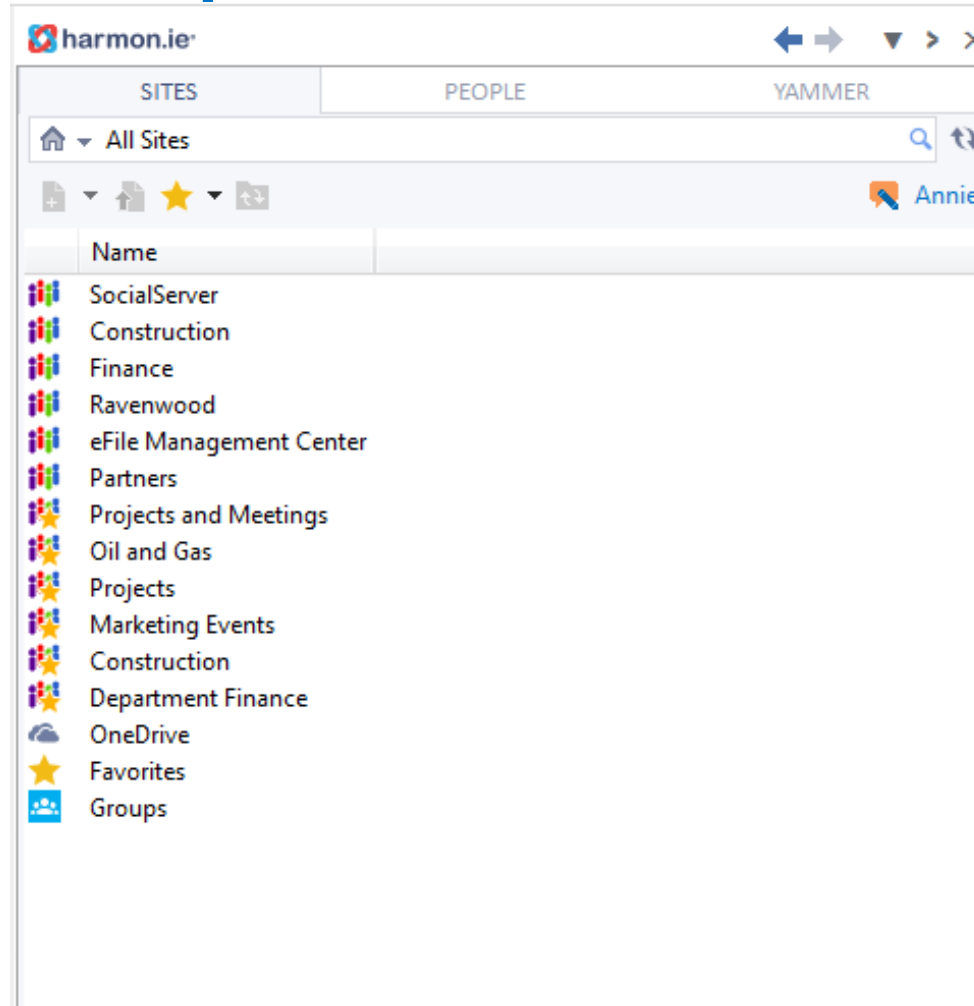
- Different interfaces
- No way to easily move content between each of them as documents evolve
- Conceptual ideas
- Brainstorming
- Formal document management



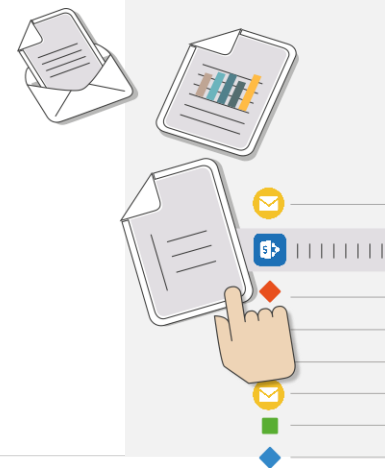
The Key

Focus on the User Experience

- Access all three with a consistent UX
- OneDrive
- Office Groups
- Followed Team Sites
- Move content as projects develop



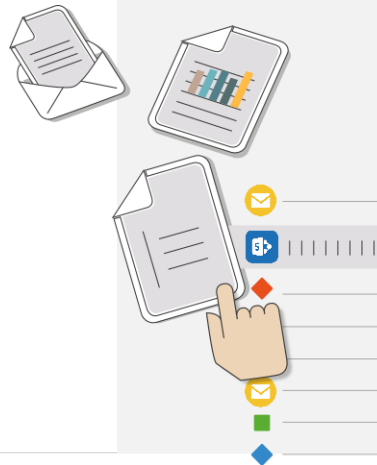
Re-use existing data and knowledge



The Challenge

Time Wasted and Experience Replicated

- Many new projects are started from scratch due to lack of shared knowledge
- Costly mistakes can be re-made
- Opportunity to streamline project timelines aren't realised

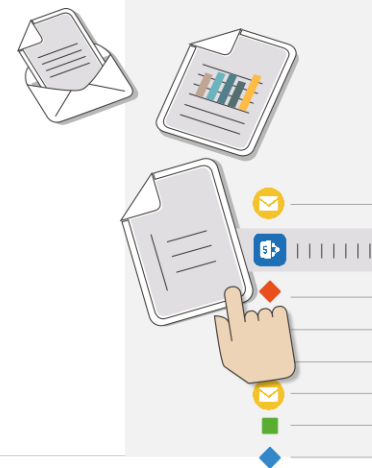


The Key Capitalise on Shared Knowledge

- Find relevant content
- Search
- Copy and paste
- Discover in Collage

The screenshot displays the harmon.ie web interface. The top navigation bar includes 'SITES', 'PEOPLE', and 'YAMMER'. The main content area shows a file browser for the path 'All Sites > Ravenwood > Marketing'. A list of files is visible, including 'Approval Status: Dr...', 'Demo.wmv', 'Project Plan.doc', 'Federator White Pap', 'Administering Harm (no subject).eml', 'EULAs.eml', 'RFP.pdf', 'sysml.overview.pdf', 'Market Research.xls', 'Proposal.docx', 'Product Roadmap.p', and 'Analysis.docx'. A table below the file list shows the 'Approval Status' for two documents: 'Federation Apr 16th seminar.ppt' (Approved by Howard ...) and 'FAQ.docx' (Approved by Carl Ada...).

Name	Modified	Modi...	Approval Status	A
Approval Status : Approved (2)				
Federation Apr 16th seminar.ppt	6/10/201...	Howard ...	Approved	
FAQ.docx	7/9/2012...	Carl Ada...	Approved	



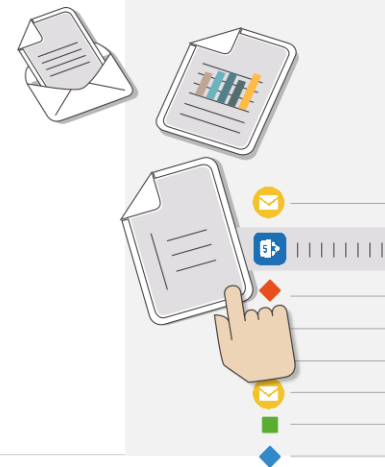
Make sure other people can access your emails and documents



The Challenge

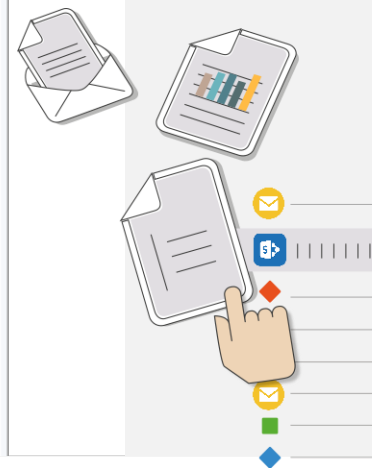
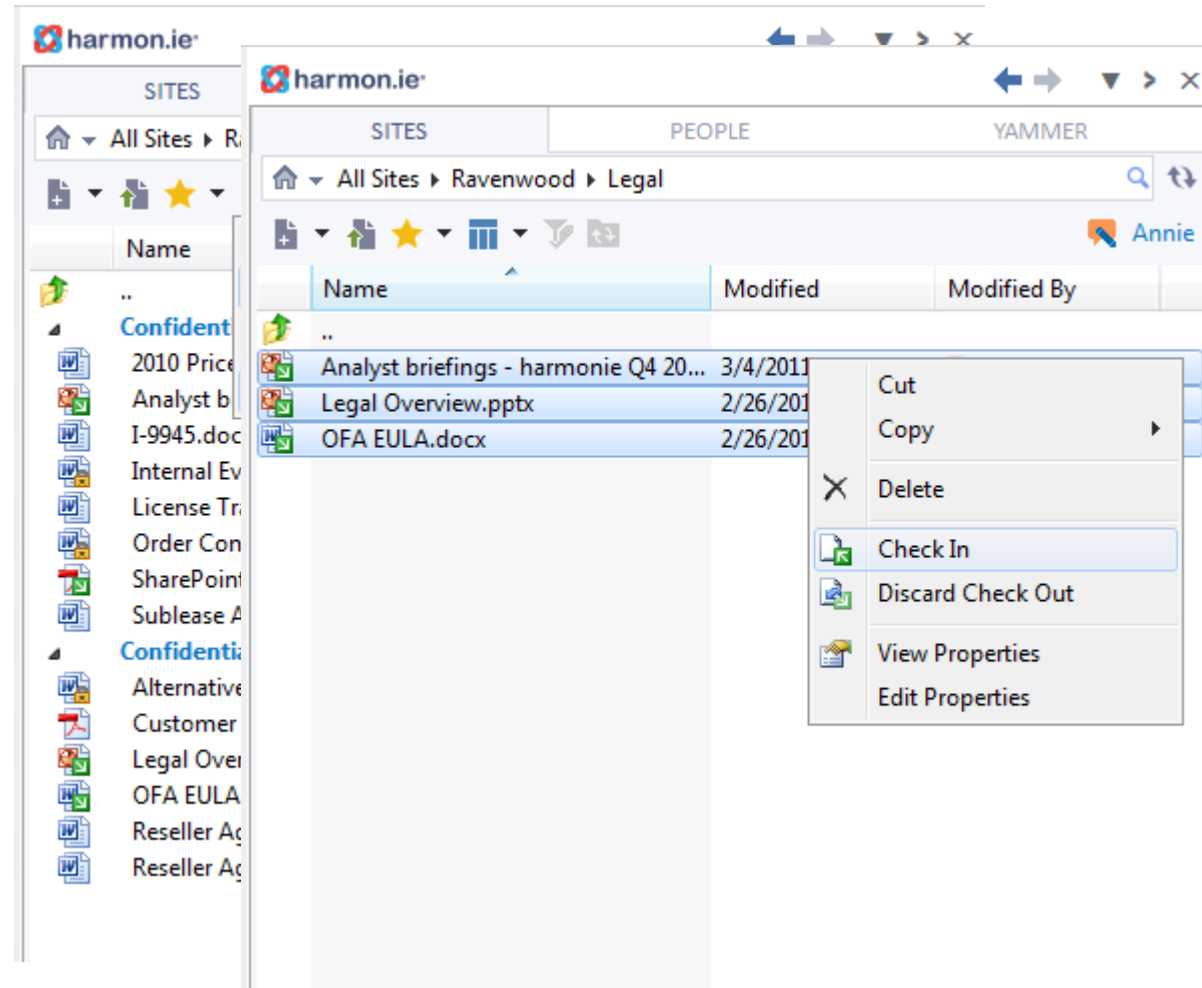
“Colleagues Can’t Access My Data”

Even early adopters and avid SharePoint users forget to ‘check-in’ documents



The Key Make It Easy

- Automatically Check In documents
- Use the 'My Checked Out' documents view
- 'Check-in' to make available to other users



Online Documentation and Videos

- User documentation

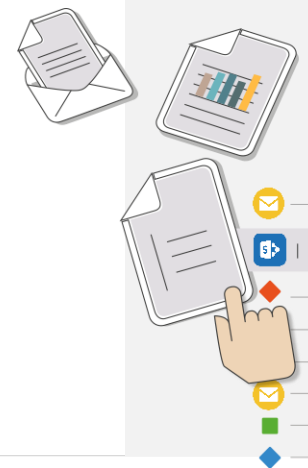
<http://harmon.ie/documentation/sharepoint/outlook/welcome>

- Training videos

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

- Try harmon.ie Enterprise yourself

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





Thank You