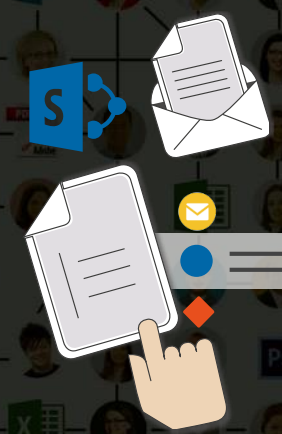


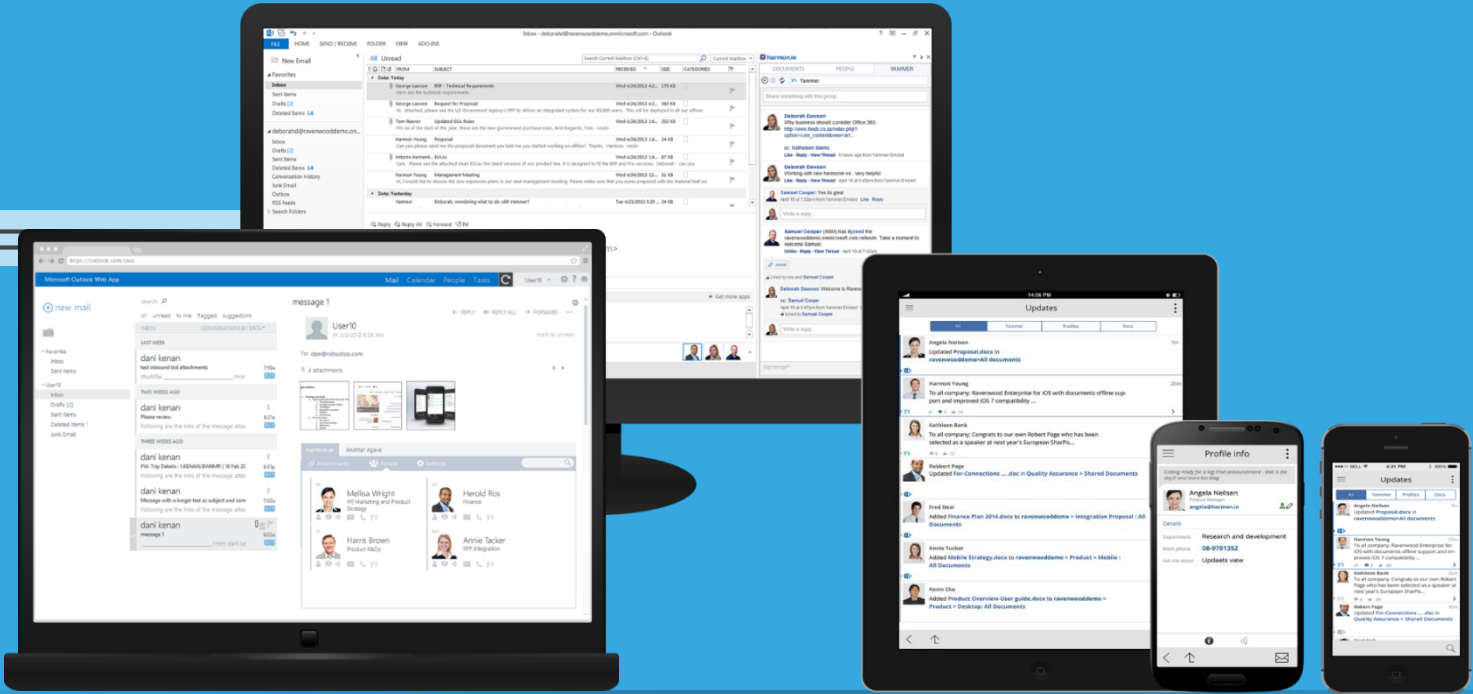
Seven Ways to Automate Information Compliance

The Keys to Capturing & Classifying Emails and Documents



Seven Ways to Automate Information Compliance

The Keys to Capturing & Classifying Emails and Documents





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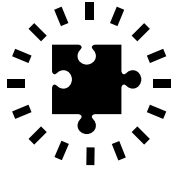
Going Beyond “Drag & Drop”



1. Get users to save e-mails
2. Get users to send links instead of document attachments
3. Automate e-mail capture
4. Automatically save entire conversations
5. Use ‘topics’ to connect related data
6. Automating where users store content in SharePoint
7. Automating completion of metadata

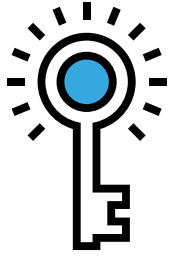
Get users to save e-mails





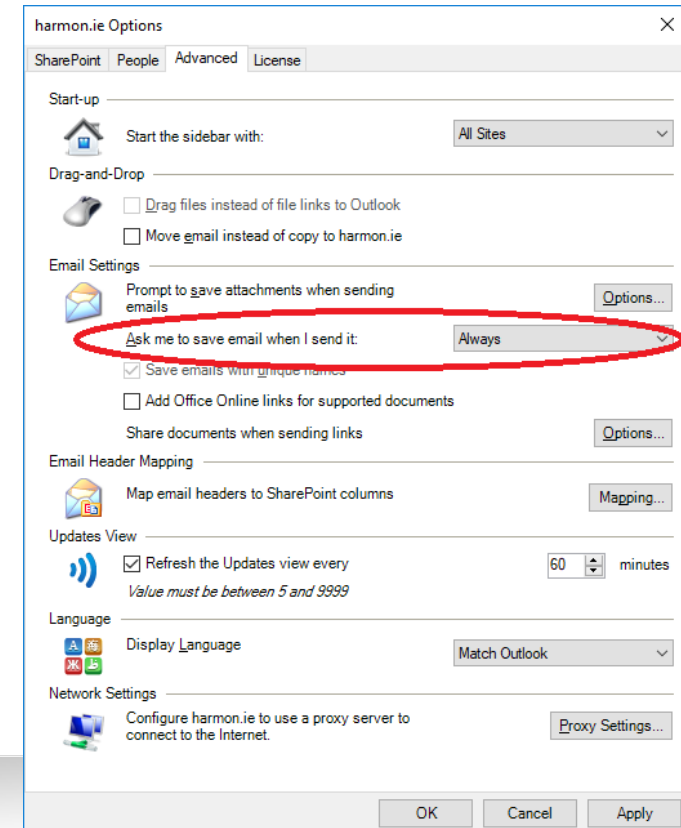
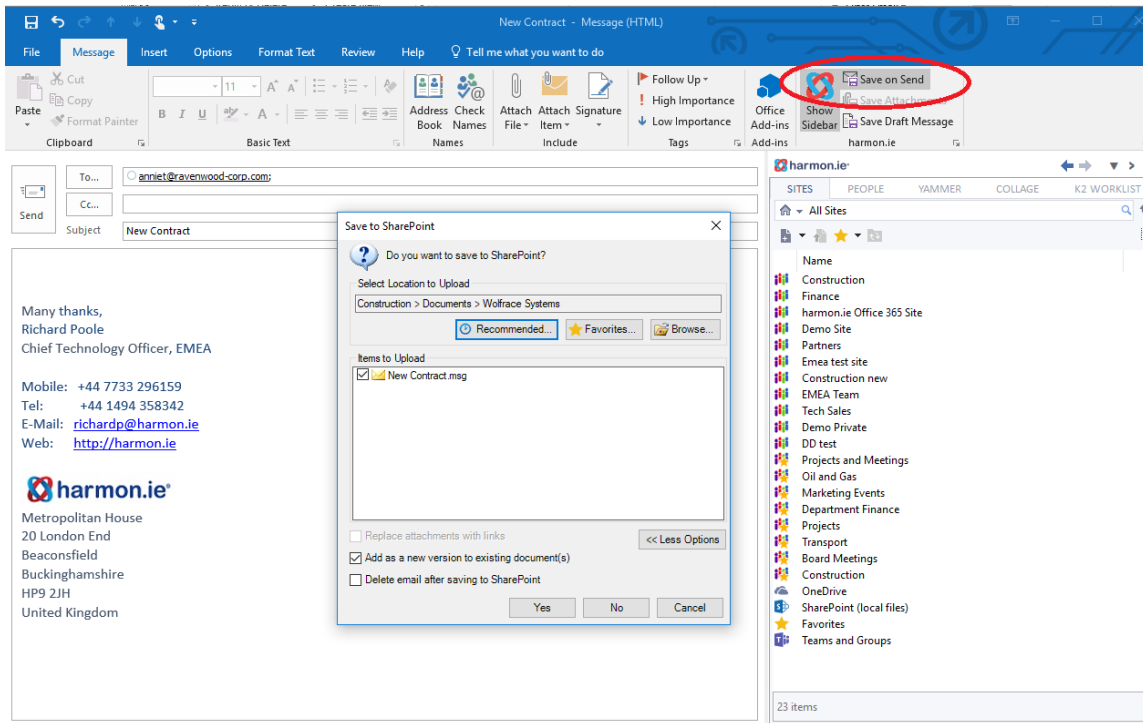
The Challenge

- You can't find what hasn't been captured
- It's difficult to change users habits

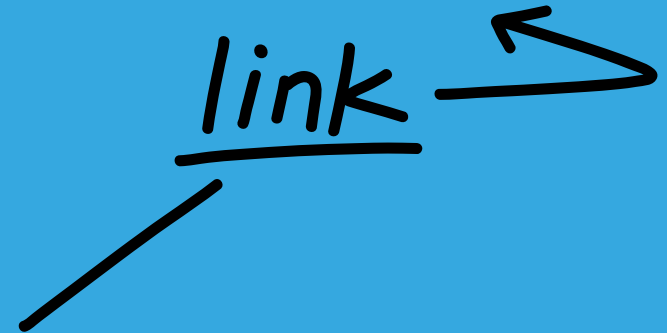


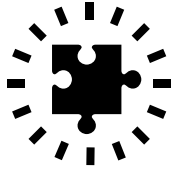
The Solution

Prompt users to save outgoing e-mails



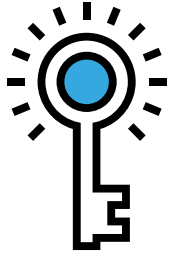
Get users to send links
instead of document attachments





The Challenge

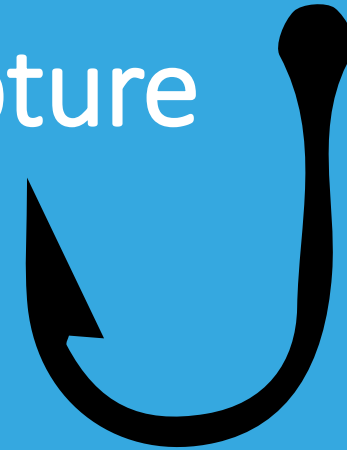
- Sending attachments creates chaos, delays, and potential mistakes
- Attachments are uncontrolled
- How do you ensure recipients have access to the documents they need?

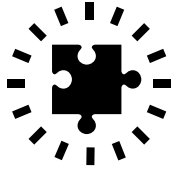


The Solution

- Prompt to Save Attachments and replace with links
- Check if recipients have access
- Grant view or edit capabilities

Automate e-mail capture





The Challenge

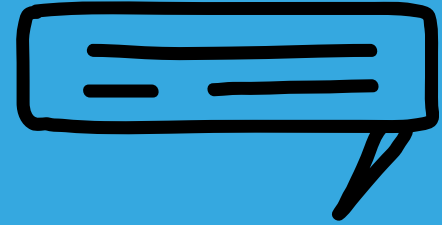
- Users don't like to continually repeat the same operations

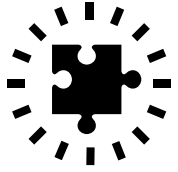


The Solution

- Favourite your frequently used SharePoint locations
- Configure Rules to automatically upload frequently received e-mails, e.g.
 - From certain contacts
 - Containing keywords

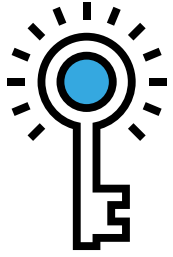
Automatically save entire conversations





The Challenge

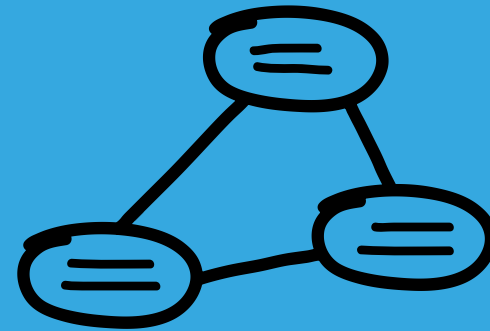
- If an important e-mail is saved to SharePoint, the subsequent conversation may need to be saved in the same location
- This requires all users to adopt the same working practice

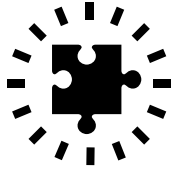


The Solution

- Enable the option to 'SaveConversationInSameLocation'
- The person who sends the initial e-mail selects the location to save the conversation
- The location is stored as a property of the outgoing e-mail
- All subsequent replies are automatically saved to the same location without prompting them

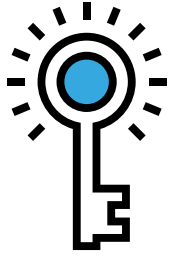
Use 'topics' to connect related data





The Challenge

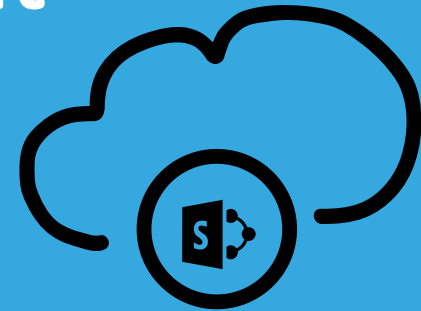
- E-mails, documents and other business data are all disconnected
- Business users need to use multiple systems to see the full picture

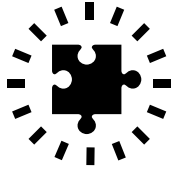


The Solution

- Harmon.ie can automatically identify topics from the e-mails you have received
- Topics can then be used to retrieve related information from other systems, e.g.
 - SharePoint
 - Exchange
 - CRM

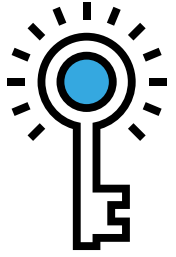
Automating where users store content in SharePoint





The Challenge

- Different people could store content in different locations
- Leading to duplication of data

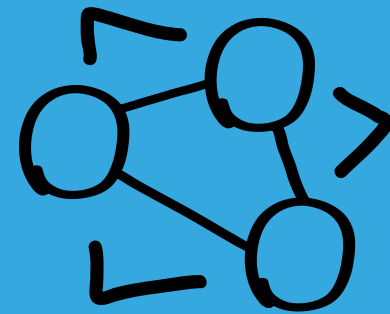


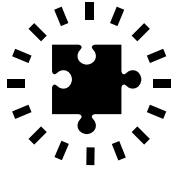
The Solution

Suggest locations based on:-

- Where the same metadata has been used
- Folder or Document Set names and hierarchy

Automating the completion of metadata





The Challenge

- Users don't like having to fill in metadata themselves
- Can become tedious and repetitive



The Solution

Use automatically-identified topics pre-fill metadata when e-mails are captured

Online Documentation and Videos

- User documentation

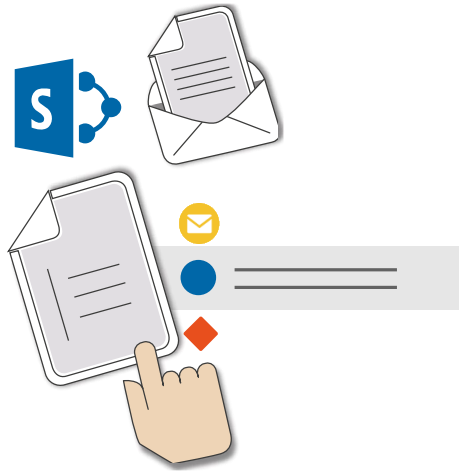
<http://harmon.ie/documentation/sharepoint/outlook/welcome>

- Training videos

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

- Try harmon.ie Enterprise yourself

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



Thank You