

Managing Emails with SharePoint

A Practical 'How To' Guide



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Stay in Touch



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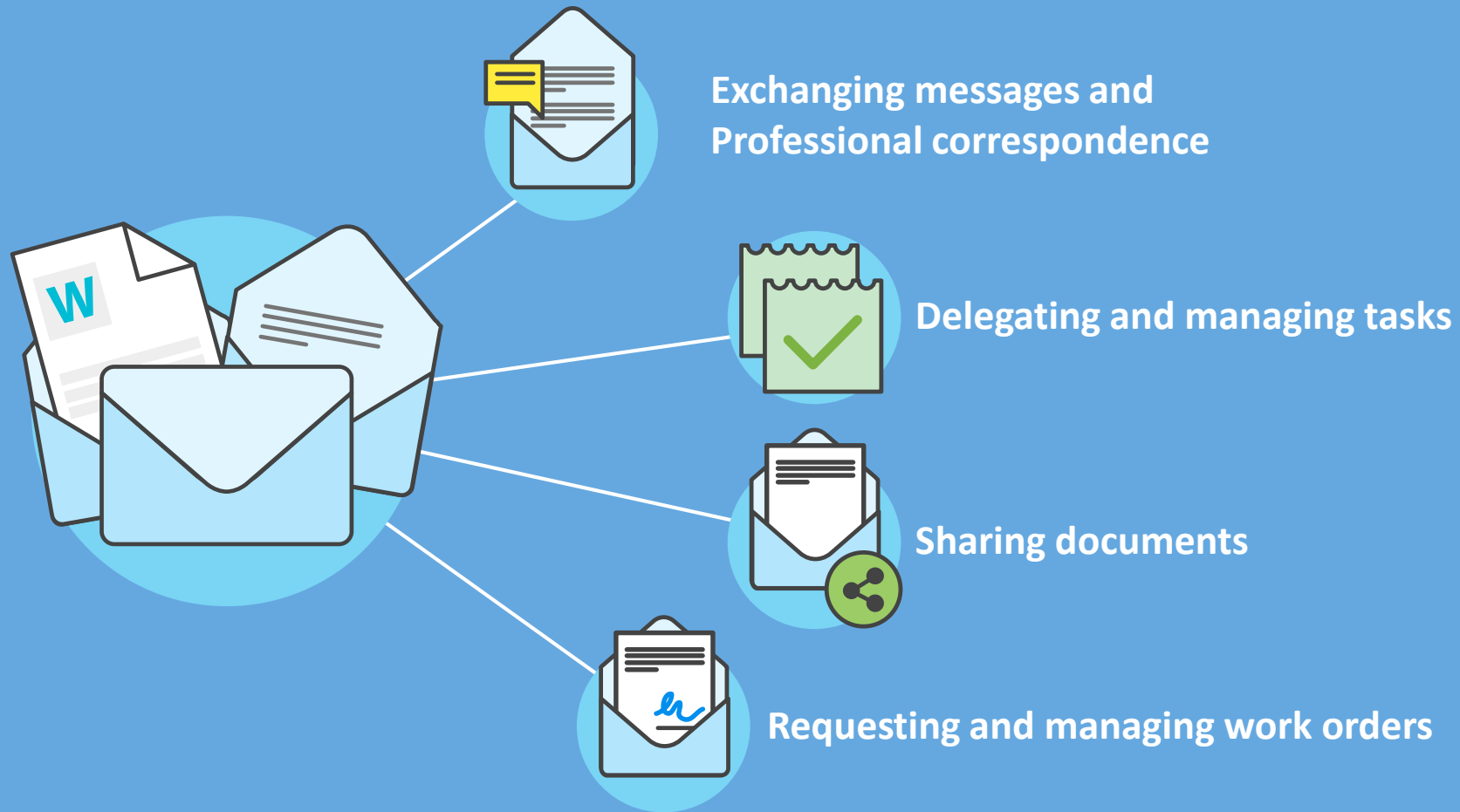


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There are currently 2.6 billion email users
That receive 88 emails per day



Email is widely used



Emails Are Documents



Emails are stored
in Exchange



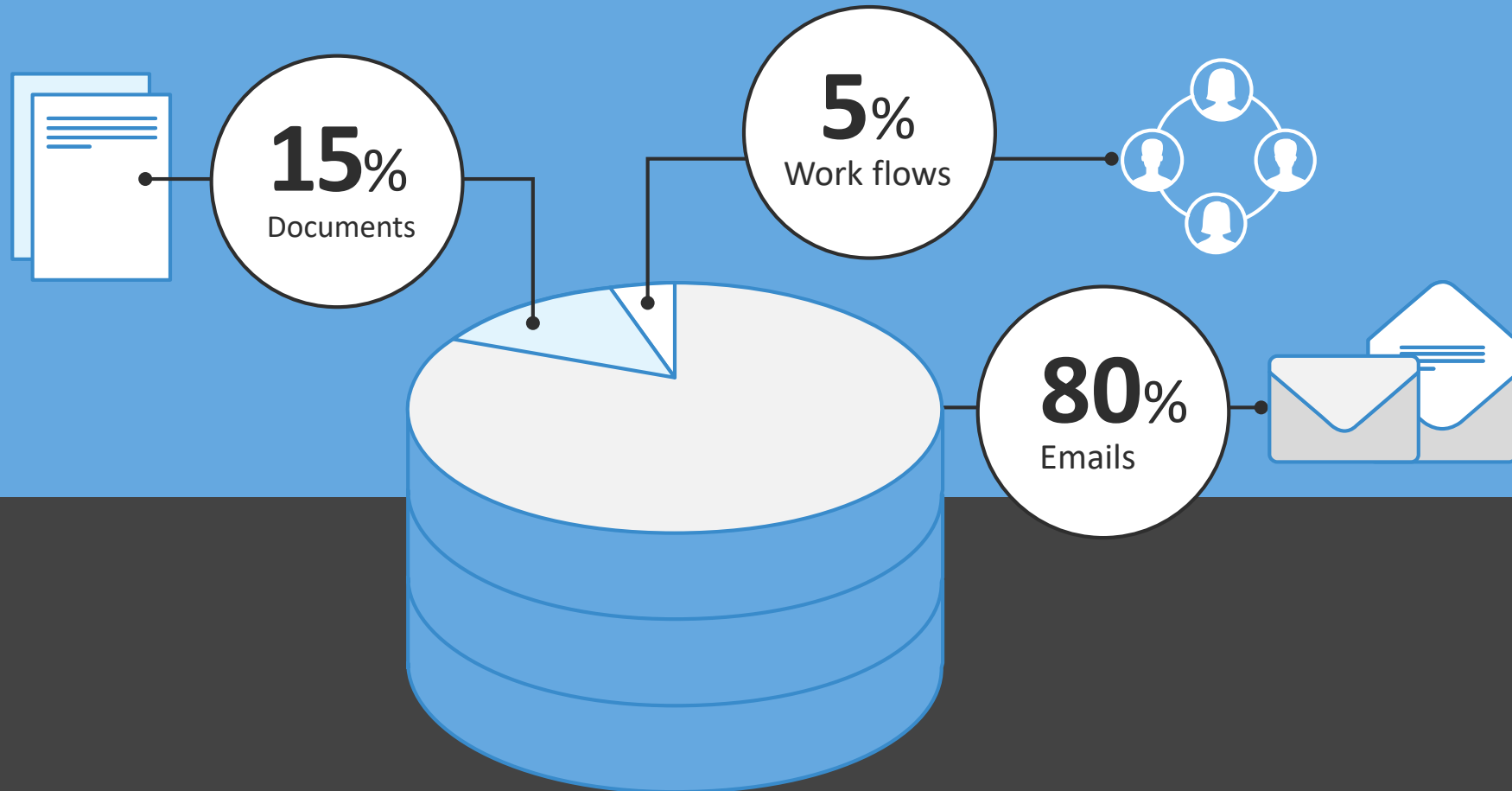
Documents are stored
in SharePoint

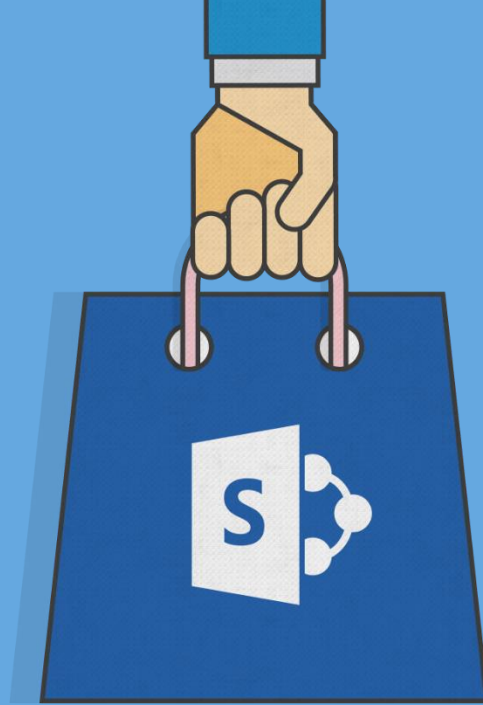
A screenshot of an email interface in Microsoft Exchange. The email is from Deborah Dawson to Karen Young. The body text reads: "Hi Deborah, I accept the terms of your proposal. Pls proceed. Best, Karen. On Tue, Sep 1, 2015 at 10:05 AM, <Deborahd@ravenwood-corp.com> wrote: Karen, Here are our engagement terms: \$120 / hr for consultation 10% additional fees for supplies and expenses Payment terms are Net + 30 days Estimated project length: 10 business days Deborah Deborah Dawson Tel: +1(201)555-1212 Email: deborahd@ravenwood-corp.com".

**THIS
Doesn't
Make Sense!**

A screenshot of a document in SharePoint. The document content is: "09.06.2015 TO: KAREN YOUNG Praxis Corp Subject: **ENGAGEMENT TERMS** Here are our engagement terms: \$120 / hr for consultation 10% additional fees for supplies and expenses Payment terms are Net + 30 days Estimated project length: 10 business days Deborah Dawson Ravenwood Corp".

80% of 'Documents of Record' Are Emails





You Bought SharePoint to Manage Documents

But, you can't manage emails in SharePoint



Office 365 Outlook

New

Search Mail and People

Folders

More

Groups New

Groups bring people together. Join a group or create one.

- Browse groups
- Create group

INBOX Conversations by Date

All Unread To me Flagged

Last week

Harmon Young Tue 6/30
 Please review
 SharePoint document links: Proposal Team, New pr...

Harmon Young Tue 6/30
 Please review new specs
 SharePoint document links: Proposal (2) Team,

Two weeks ago

Harmon Young 6/26/2015
 OneDrive sharing
 SharePoint document links: Market Research (2)

Harmon Young 6/26/2015
 Sharing with onedrive
 Alternative Financing.docx

Harmon Young 6/26/2015
 Please review
 SharePoint document links: Proposal Team, Please...

Please review

Harmon Young
 Fri 6/12/2015 3:10 PM

To: Angela Neilson; Annie Tucker; Deborah Dawson; Fred Neal; Harmon Young; Kathleen Banks;

harmon.ie

SharePoint document links:

[Market Research \(2\)](#)

Team,



Emails are stored in Exchange

Office 365 Sites

BROWSE FILES LIBRARY

Ravenwood Office 365 Demo Site Contracts Records Center Partner Demos Construction Projects and Meetings Finance Transport SandBox

Prospects

Home Collateral Notebook Recent

Prospects Customers Issue Tracker Team Calendar Key Contacts Legal Subsites Contracts Partner Demos

New Upload Sync Share More

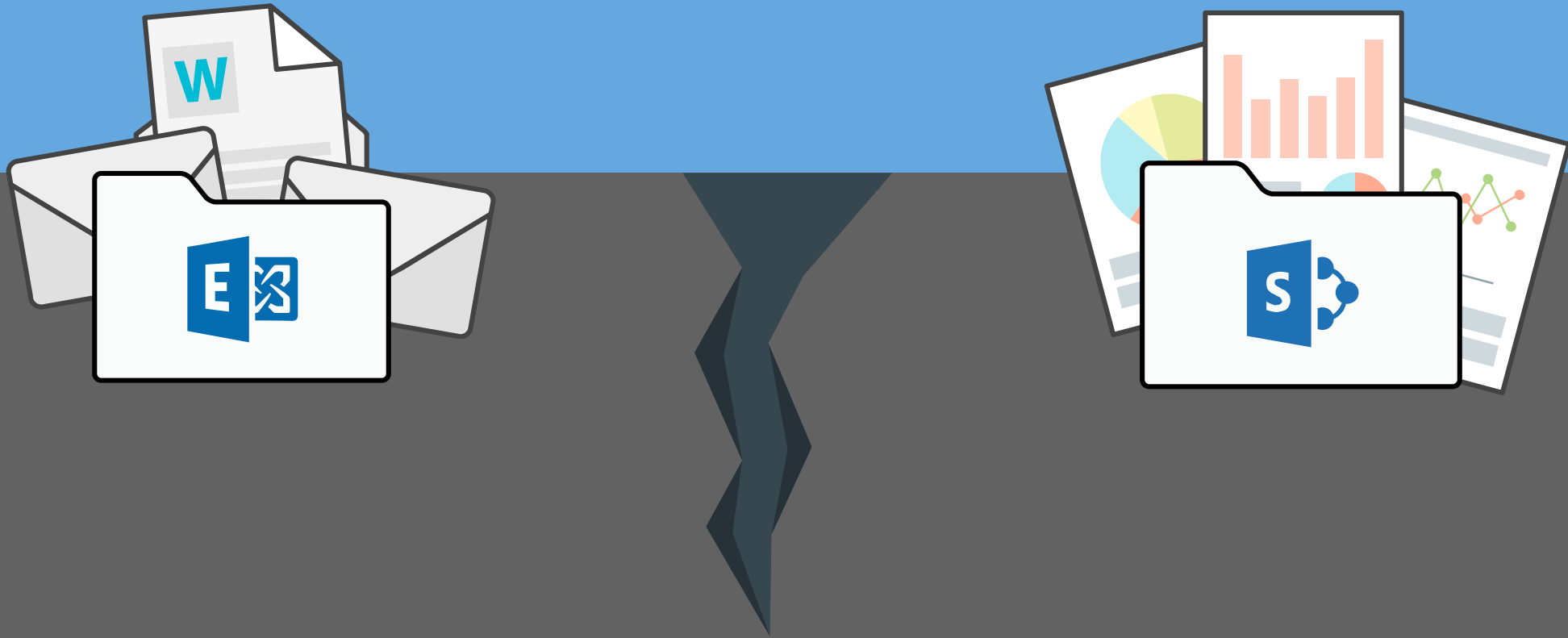
All Documents Find a file

Name	Modified	Modified By	Tags / Social Tags
Contract final Qoherent 2015	... December 1, 2014	<input type="checkbox"/> Angela Neilson	
Contract Standard Metals Mobile First Initiative	... April 29	<input type="checkbox"/> Harmon Young	
EPA Compliance Qoherent	... December 1, 2014	<input type="checkbox"/> Angela Neilson	
EPG Compliance	... November 25, 2014	<input type="checkbox"/> Annie Tucker	
Praxis Corporation , an overview of EPG Compliance	... April 27	<input type="checkbox"/> Harmon Young	
Praxis Product Requirements and enhanced feature requests	... November 25, 2014	<input type="checkbox"/> Annie Tucker	
Qoherent Mobile First RFE	... November 27, 2014	<input type="checkbox"/> Harmon Young	
Qoherent Building Plans	... November 27, 2014	<input type="checkbox"/> Harmon Young	
Qoherent Enterprise renewal contract	... March 31	<input type="checkbox"/> Ronald Fitzgerald Agan	



Documents are stored in SharePoint

There is an Exchange – SharePoint Gap



The Result? Initiatives Fail



Managing Records

FAILED



Retaining Knowledge



Managing Products

FAILED



Managing Cases

FAILED

FAILED



Managing Projects

FAILED



Managing Clients

FAILED

Mind The Gap

Solving the Last Mile Problem

Make The Right Thing The Easy Thing



Capture

Documents & emails in SharePoint



Classify

Documents & emails accurately in SharePoint



Discover

Find & retrieve documents & emails from SharePoint



Collaborate

Share documents & emails stored on SharePoint, with colleagues

harmon.ie Apps

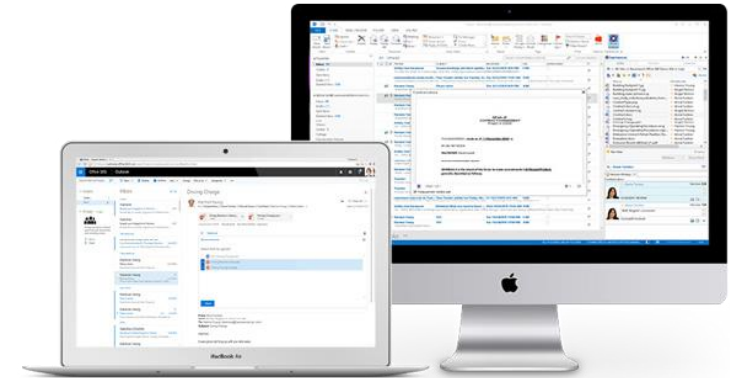
Office
APP
AWARDS
2017



Outlook



Mobile Apps



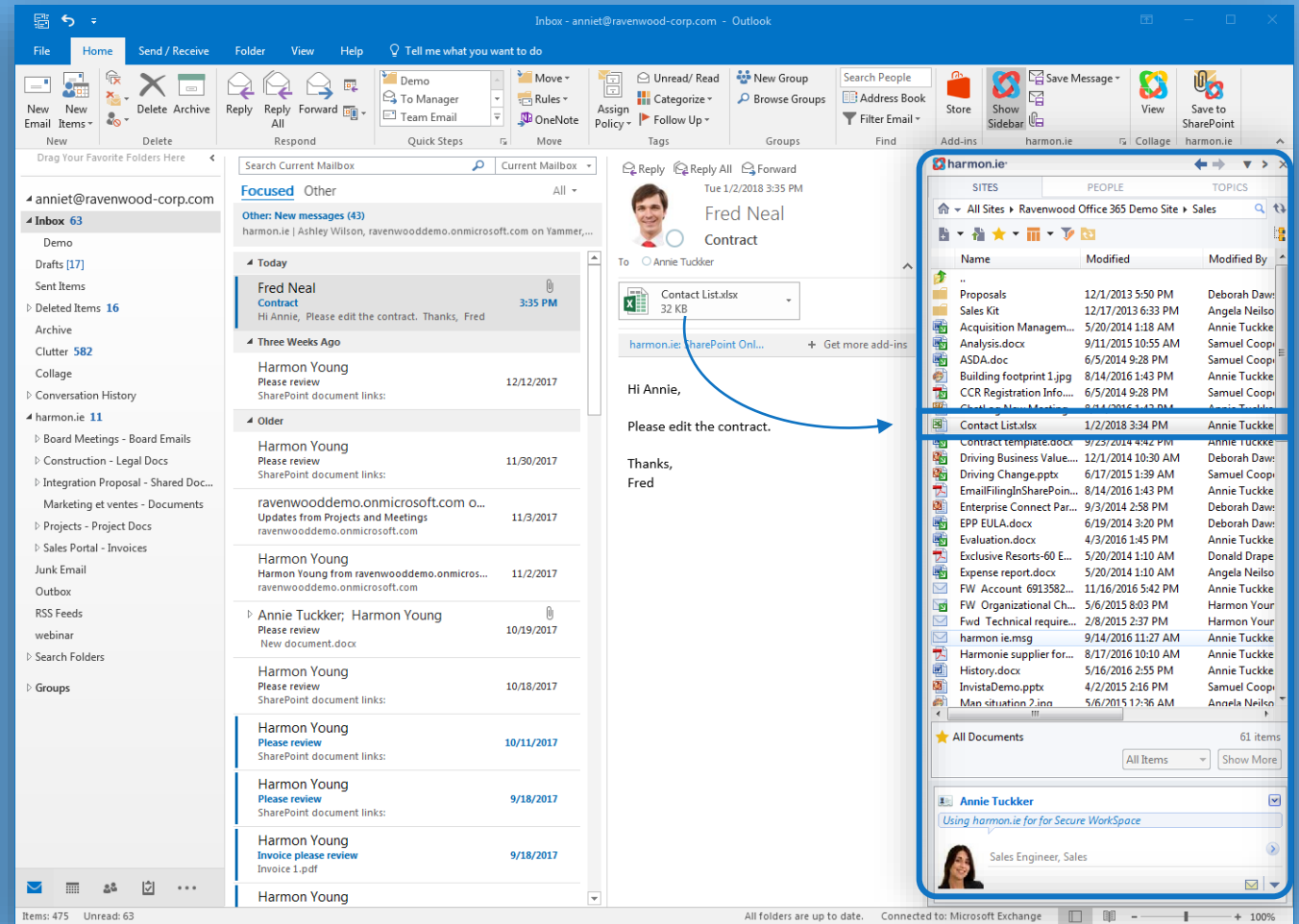
App for Office

Bring SharePoint to Outlook

A practical approach to email management

- Drag & drop emails (& documents) to SharePoint from Outlook
- Store, classify and organize email content in folders directly in SharePoint from Outlook
- Retrieve content from SharePoint that has been classified correctly and efficiently, from Outlook
- “Save Draft” & “Save on Send” emails to SharePoint, from Outlook
- Declare emails and documents as SharePoint records, from Outlook

Works with SharePoint on-premises and SharePoint Online



Smart Email Capture

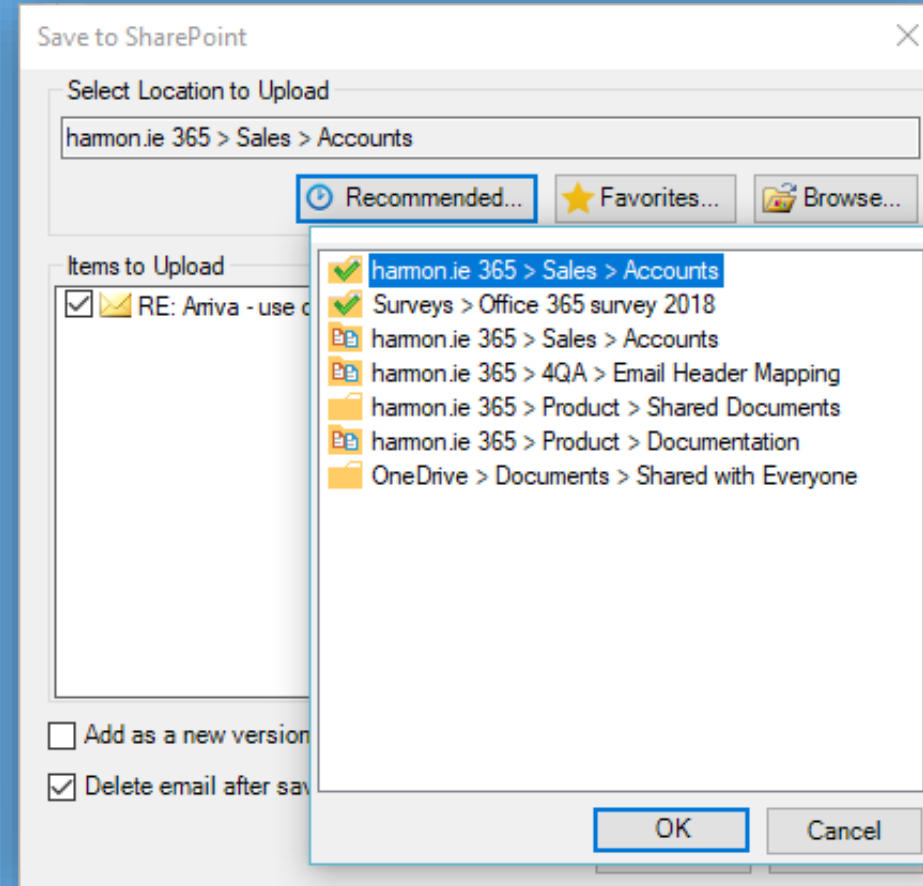
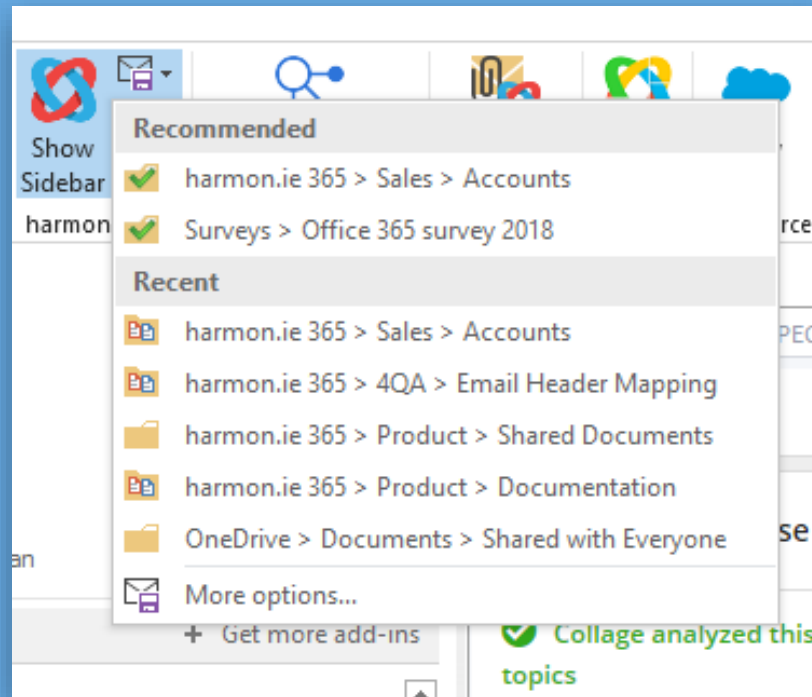
Artificial Intelligence-powered SharePoint Filing Recommendations

The screenshot displays a Microsoft Word interface with a message pane on the left and a harmon.ie sidebar on the right. The message pane shows an email from Richard Bonham to Ron Howard, dated 2/25/2017, with the subject 'Praxis Corp. - Omega Project pilot kickoff schedule'. The email body contains text about the Omega Project (XV0056) and a POC program. The harmon.ie sidebar features a 'Save Message' button, a 'POC Status Update' card, and a 'Collage analyzed this email and found these topics' section with buttons for 'Omega Project', 'Praxis Corp', 'POC', and 'EMR Team'. Below this is an 'IMPORTANT UPDATES' section with a card for Ron Howard from Praxis Corp, stating a change in stage from 5.0 to 6.0 proposal.

harmon.ie recommends locations on SharePoint to save emails

Smart Email Capture

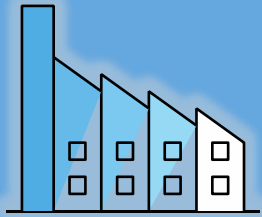
Artificial Intelligence-powered SharePoint Filing Recommendations



Demo



Email Management with SharePoint



Sample Customers



Key harmon.ie Functionality

- Drag emails to SharePoint from Outlook
- Auto-capture important emails
- Easy to classify emails with metadata
- Automatically-generate 'topic' metadata (with Office 365)
- Auto-generated location recommendations for storing emails (with Office 365)
- Easy to find emails
- Contextual search promotes governance



Why it Works

- It's a no-brainer; email record uploading is part of familiar workflow
- Enables one shared email to reduce email chaos
- Easy way to surface and preserve emails when colleagues are out of the office or leave the organization
- Emails are stored and classified in a central location



The Business Value

- Huge email storage saving
- Elimination of email chaos
- Enhanced compliance
- Effective E-discovery
- Improved (customer) service
- Reduced liability / Improved governance

harmon.ie Highlights



Over 1,000
Enterprise Customers



1.8M Users



2017 Partner of the Year Finalist
Collaboration and Content Award

Office
APP
AWARDS
2017



Microsoft Partner of the Year
2015 Finalist



Microsoft Partner
Gold Application Development

Over 1000 Enterprise Customers

Aerospace & Defense

GENERAL DYNAMICS

BAE SYSTEMS

Banking & Finance



Construction



Food & Beverage

GRUPE soufflet

LouisDreyfus Commodities

Energy



Government



Healthcare



Insurance



Manufacturing



Professional Services



Technology



Utilities



Thank You

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