



2019

SharePoint Surgery Case Management



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What is “Case Management”?

Here are a few examples:-

- Legal Matters
- Insurance (risk assessment, policies, claims, etc)
- Financial services
- Tax advice





What are the challenges?

- Lots of communication – mostly by e-mail
- Traceability of who said what/when etc
- Maintaining many iterations of documentation
- Need to have a single system that users “live and breathe” in
- Each user could be working on a handful of cases at any time

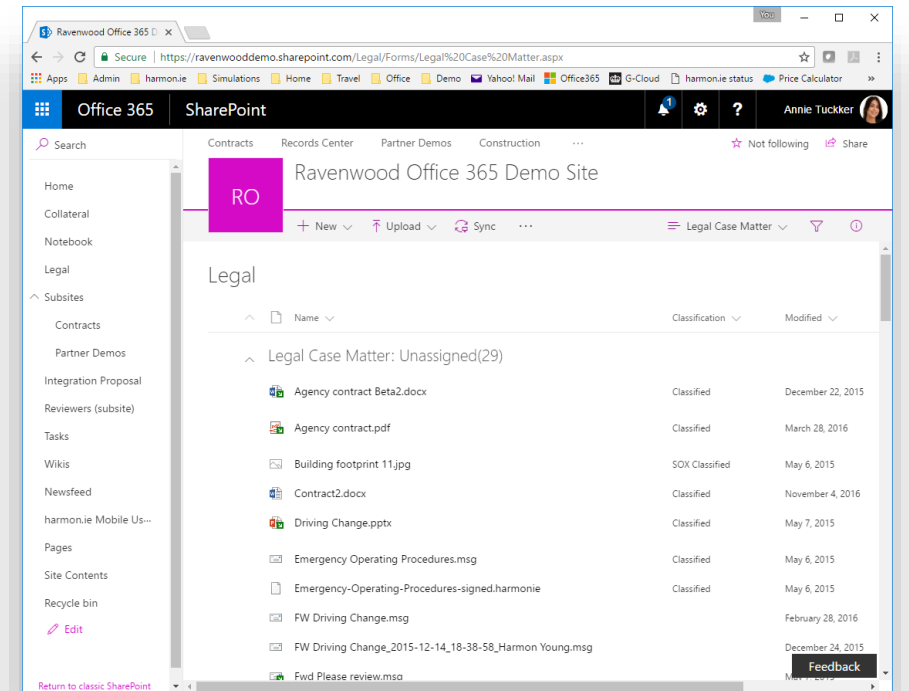
Poll Question #1

How do you currently manage cases?

Is SharePoint the best solution?

Yes, but.....

- Users may have come from a bespoke system, that meets specific needs
- Those systems typically have a tight e-mail integration
- On its own, SharePoint isn't the single interface that business users need / like / want to use



Is SharePoint the best solution?

Yes – it's the ideal **single platform**

- Manage e-mail communication and documentation together – in context
- Metadata can be utilized to organize and categorize
- Search all data together



Is SharePoint the best solution?

Yes – with Outlook and harmon.ie



Provides a complete, end to end solution

How can SharePoint be used?

There are many different approaches to structuring cases in SP

- Folders
- Libraries
- Sites
- Site Collections
- Document Sets

NEWS FLASH!

Harmon.ie supports
all of these
approaches

Poll Question #2

If you are using SharePoint already,
how are you organizing documents
today?



How should you categorise data?

- Capture metadata
- Use Views to represent data in different ways
- Bulk update multiple items at once

How do you collaborate?

With clients

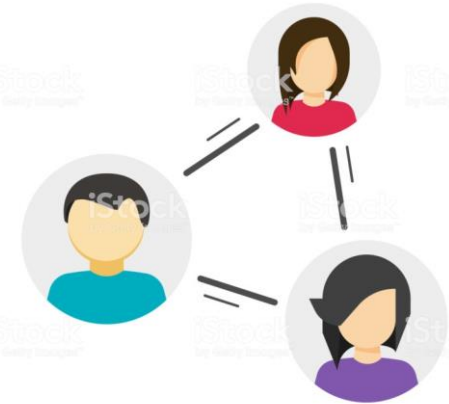
- Capturing documents and e-mails
- Sending and receiving documentation
- Maintaining document versions



How do you collaborate?

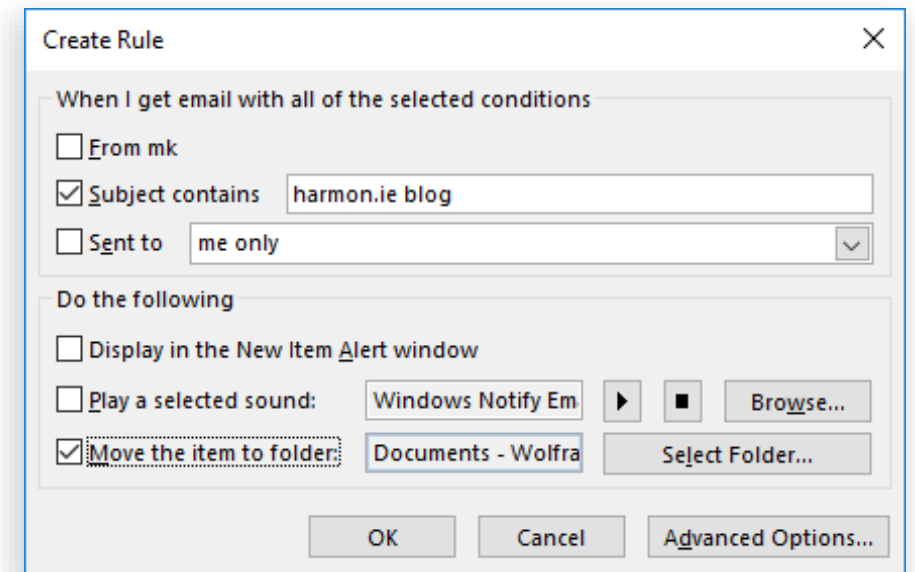
With colleagues

- Sending and receiving links
- Identifying duplicates
- Updates
- How do I know if someone else has already filed this e-mail?



Can you automate capturing data?

- Business users have the knowledge to build logic
- They need to save time
- Outlook rules are often used to file e-mails in folders



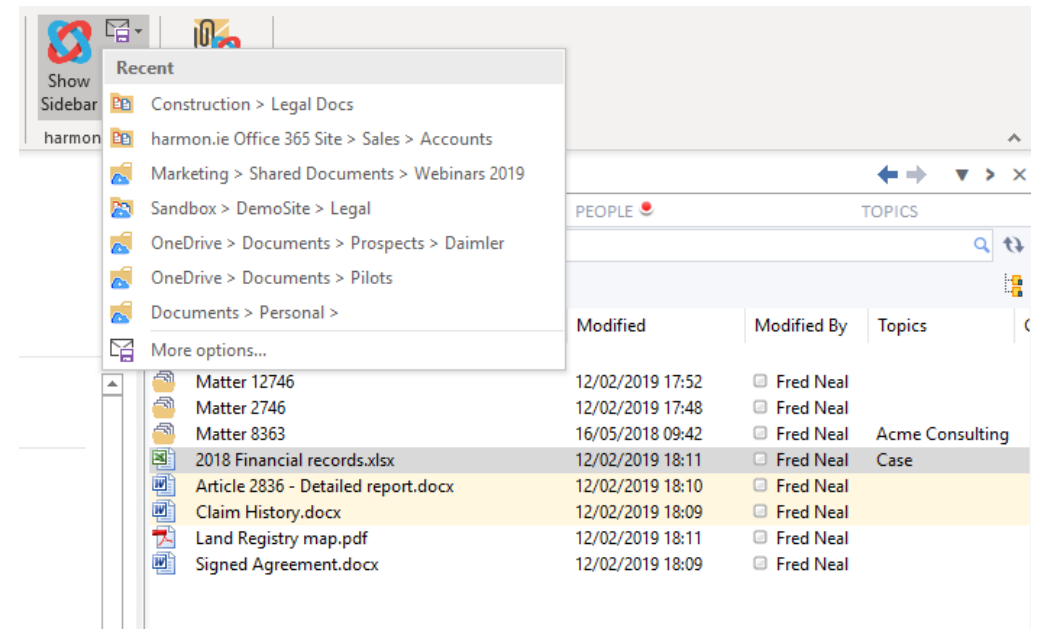
How do you know what content should be saved?

- Identify relevant Topics from e-mails you receive
- Use Topics to find related content
- Identify other content to save

The screenshot shows the Outlook interface for a user named 'harmon.ie'. The 'TOPICS' tab is active, displaying a topic named 'ELECTRIC MOBILITY'. Underneath, a sub-topic 'AUTOMATED DRIVING' is highlighted. A list of emails is shown, including 'Automated driving competition', 'Innovations_2019-01-09', and 'Automated driving Planning 2019_'. Below this, a section titled 'Saved to SharePoint' lists several documents and files, such as 'Fly by wire_2019-01-09...', 'Robotics in Automated driving_2019-...', 'Assisted driving concept...', 'Assisted driving framework...', 'Driving Safety instructions...', 'Driving Safety guidelines...', 'Automated driving program...', 'Automated driving competition...', and 'Automated driving components...'. A blue callout bubble with the text 'Potential emails to save to SharePoint' is positioned over the 'Open & Save' buttons of the first three emails in the list.

How do you know where the content should be saved?

- Suggest locations based on:-
 - Where related content has already been stored
 - Where you have recently been working



Poll Question #3

Would you like to be contacted by a
harmon.ie representative?

