

Managing Cases with SharePoint

harmon.ie Solution

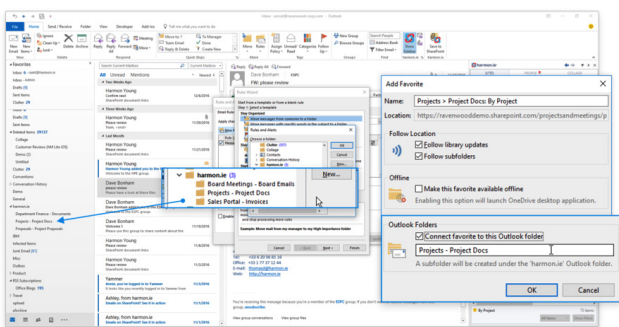
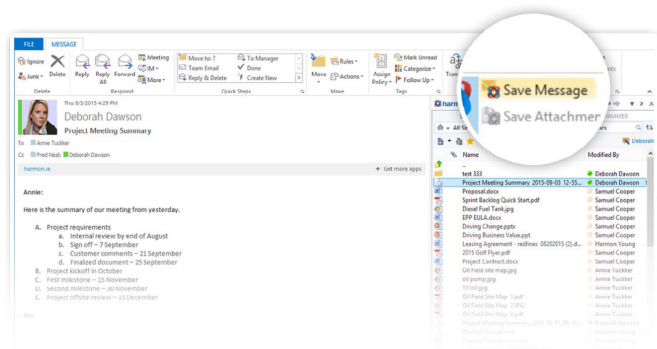
The Challenge:

Businesses often struggle to implement efficient case management solutions. SharePoint lets users store all case information, including email, in one place. Yet, SharePoint doesn't provide an interface where they can complete all their tasks—such as checking in documents and communicating via email. Users who spend much of their day working in email have to toggle back and forth between Outlook and SharePoint. This change of context is a distraction that creates confusion and leads to costly errors.

harmon.ie's Solution:

harmon.ie integrates with SharePoint to bring all your case information directly into your Outlook window. With the harmon.ie sidebar, users can instantly connect to SharePoint sites, lists, and libraries, both on-premises and SharePoint Online, without having to leave their email client. Here's how it works:

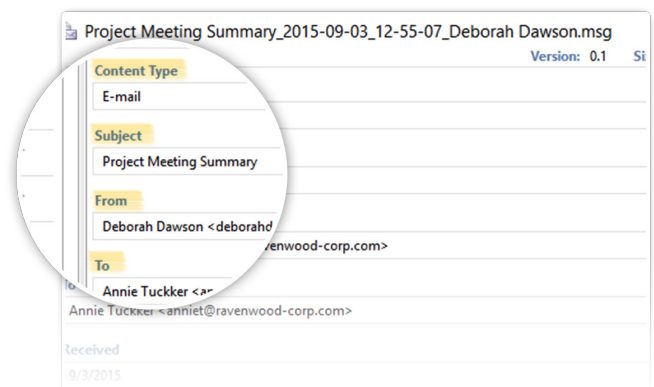
Store email messages and documents in SharePoint by dragging and dropping them from your Inbox or from Windows Explorer to the harmon.ie sidebar in Outlook.



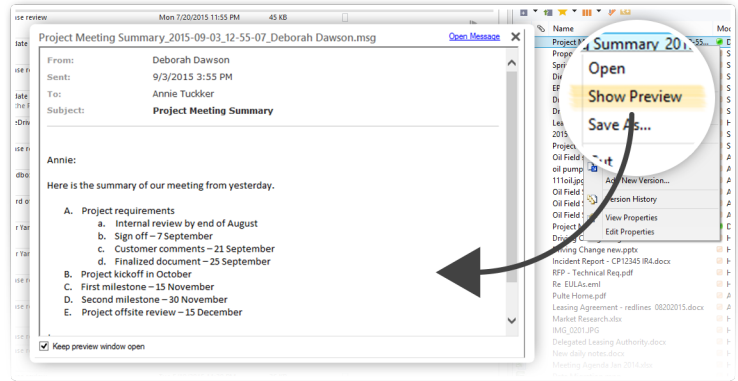
Auto-capture email messages: designate specific Outlook folders as **drop off folders** that map to SharePoint folders. You have the power to decide which emails to move to the drop off folders, to automatically capture and save them in SharePoint. Outlook rules can be set up to automate the upload process even more. For Office 365 users, harmon.ie can also provide smart recommendations about where to store each email in SharePoint.

Classify email messages and documents in SharePoint.

- harmon.ie automatically prompts you to fill-in required metadata, so you can be assured that documents and email messages are classified accurately and completely.
- harmon.ie automatically maps email headers such as **To**, **From**, **Subject**, and **Received**, to SharePoint metadata, making it effortless to comply with email retention policies.
- If you are using Office 365, harmon.ie can automatically add topics extracted from email content as SharePoint metadata.



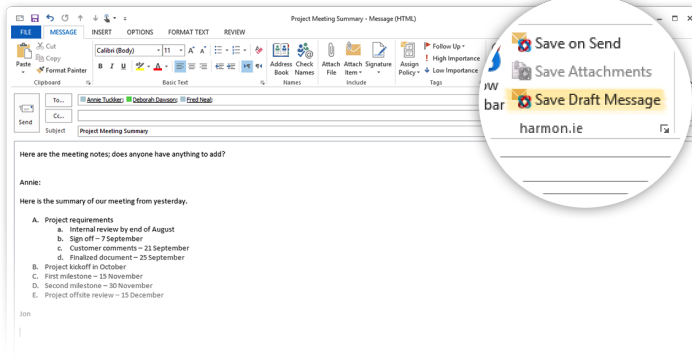
Retrieve email messages and documents from SharePoint easily: use SharePoint search, filter by tags, column filtering, and more, all from the harmon.ie sidebar in Outlook.



Collaborate with colleagues using email messages and documents stored in SharePoint.

Realize the following harmon.ie benefits of working with SharePoint from within Outlook to manage cases:

- Eliminate document and email chaos by maintaining one copy of the truth
- Preserve accurate version history of email exchanges and documents
- Use draft emails to collaborate internally
- Prevent data leakage by sharing secured links instead of attachments



harmon.ie Benefits

Easily Upload and Classify Emails and Documents: harmon.ie offers a host of methods to effortlessly upload documents and emails to SharePoint, and to intelligently classify them using SharePoint metadata.

Collaboration: Many people contribute to a case during its life cycle. harmon.ie maintains accurate version history of emails and documents to make sure you are working with the latest copy. In addition, harmon.ie provides a real-time activity stream that helps you stay on track when managing a case.

Findability: Use search, filter by tags, column filters, and more, to easily retrieve documents, emails, and records from SharePoint.

Communication: Case management involves a considerable amount of communication. harmon.ie integrates with Skype for Business and with Yammer to facilitate 'in context' communication with colleagues. Also, harmon.ie helps you to communicate with customers easily - maintaining a record of correspondence, directly within SharePoint.

About harmon.ie

harmon.ie (www.harmon.ie) makes user experience tools for the digital workspace, built to deliver information the way you think. harmon.ie empowers thousands of enterprise customers to realize the full business value of their existing Microsoft investments. The company is the recipient of a Microsoft Best App Award 2017, is a Microsoft Partner of the Year Finalist, and is an IBM global partner.

