

Manage Cases with SharePoint

Business Solution

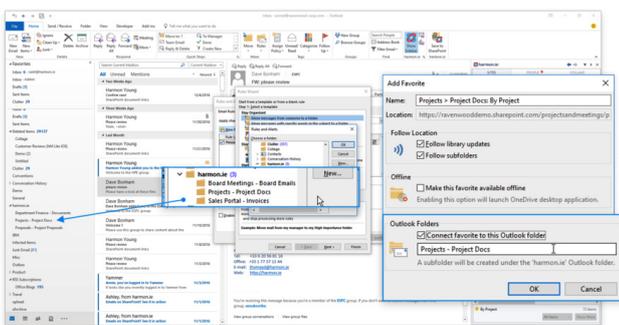
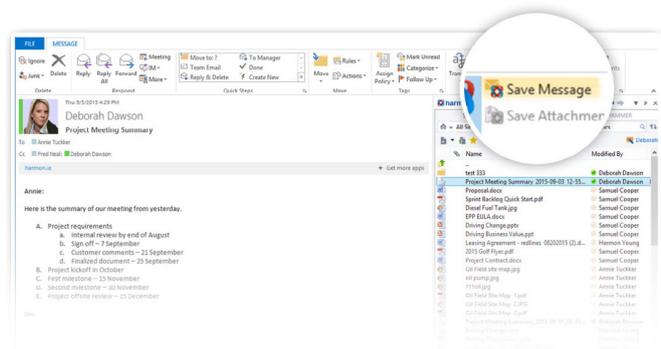
The Challenge:

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, SharePoint... and now Teams. These context switches are a distraction that creates confusion and leads to costly errors.

harmon.ie's Solution:

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

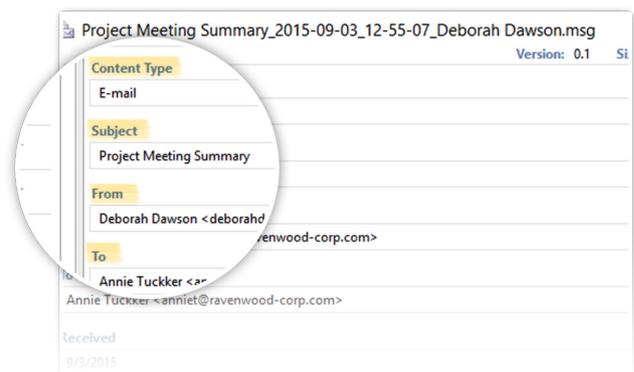
Store email messages and documents in SharePoint or Teams conversations by dragging and dropping them from your Inbox or from Windows Explorer to the harmon.ie sidebar in Outlook.



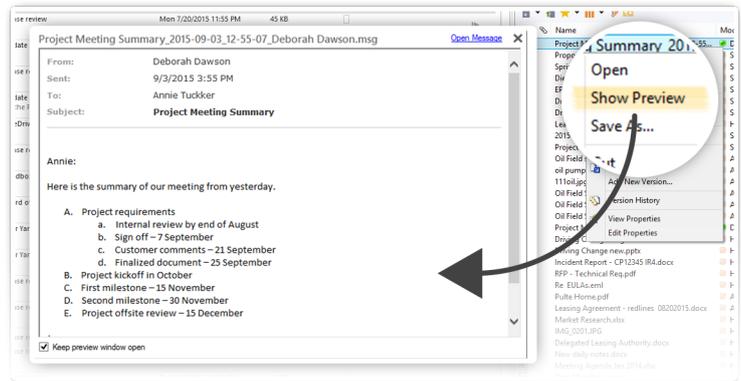
Auto-capture email messages: designate specific Outlook folders as **drop off folders** that map to SharePoint folders. You have the power to decide which emails to move to the drop off folders, to automatically capture and save them in SharePoint. Outlook rules can be set up to automate the upload process even more.

Classify email messages and documents in SharePoint or Teams.

- 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.

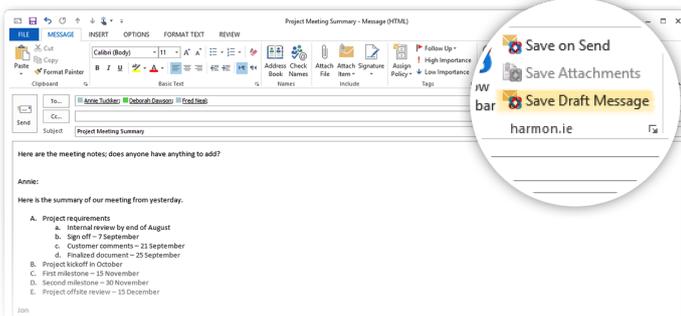


Retrieve email messages and documents from SharePoint or Teams easily: use Microsoft search, favorites, filter by tags, column filtering, and more, all from the harmon.ie sidebar in Outlook.



Collaborate with colleagues using email messages and documents stored in SharePoint. Realize the following harmon.ie benefits of working with SharePoint and Teams 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 or Teams, 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 favorites, search, filter by tags, column filters, and more, to easily retrieve documents, emails, and records from SharePoint and Teams.

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

About harmon.ie harmon.ie makes it easy for knowledge workers to capture and classify emails and documents to SharePoint and Teams directly from Outlook, the place they already spend their work time. By making it easy to do the right thing, harmon.ie increases SharePoint adoption, workplace productivity, as well as information governance and compliance. That is why thousands of enterprise customers count on harmon.ie's SharePoint and Office 365-based user experience products for email and records management, collaboration, knowledge retention, and SharePoint adoption. harmon.ie has won numerous Microsoft Best App awards and is a long time Microsoft Partner.

