# harmon.ie helps RSPB soar above information management

## Summary

Since being founded in 1889, the Royal Society for the Protection of Birds (RSPB) has witnessed a growing threat to wildlife and aimed to combat that threat by growing themselves. Now the largest nature conservation charity in the United Kingdom, RSPB continually strives to improve work both internally and with external organizations to give nature the home it deserves.

To forge strong relationships inside and outside the workplace, the secure and timely management of information as it flows through the organization is paramount. By using harmon.ie for Outlook, RSPB has improved the document management capabilities of SharePoint to maximize information management across the business.

> "Using harmon.ie is helping us better manage our information, especially the really important stuff. The documents we need to keep, like our records and any corporate information, are easier to access and more secure."
>
> *Jenny Sinclair, Lead Information Manager, RSPB*

## A bridge between email and SharePoint

Email is still the leading tool for communication across the enterprise. But when dealing with information in the form of file attachments, it can get confusing trying to follow the volume of emails that come in every day. Jenny Sinclair, Lead Information Manager at RSPB, often works in close conjunction with the IT department to make sure information management is handled efficiently.

*"As a lead information manager in the Knowledge and Information Services team, I'm tasked with producing policies, guidelines, and instructions on how we should work better with information. Because we're conservationists, we deal with numerous contracts that contain personal information. We're commonly dealing with supplier contracts, business administration documents, land management documents, legal documents…that kind of thing. And I obviously can't keep track of such a range of document types without understanding the IT behind it. That's how I cross over into the IT department: helping people understand how they can use tools to better their information management."*
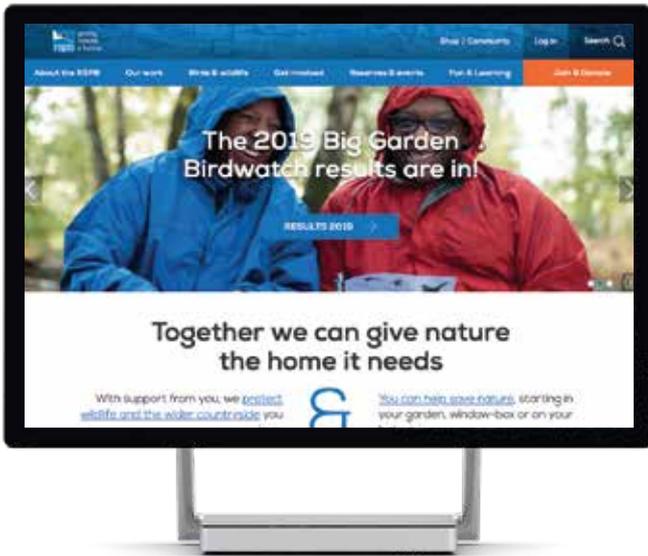
Acting as the bridge to carry information from email to SharePoint, harmon.ie creates a single window for both Outlook and SharePoint. This has allowed RSPB to improve their information management company-wide.

## A global problem

Information management doesn't have to be non-existent to be in need of improvement. For many companies, email can disguise many underlying problems and bottlenecks around information management:

*"I don't think our problem is unique. Everyone lives in their email inbox—this is a problem affecting the whole world. Information is flying around the organization, from company records, to corporate memory, to archived information. Some of it's important, some informal. We need to capture all that information, but the job is much harder when everyone's keeping it to themselves."*

RSPB employees use the company intranet for things central to the organization, but they aren't aware that the information stored in their own email folder structures is only good for them, and not for their colleagues. This also increases the likelihood of duplicated information, making information altogether harder for workers to find and access.

## Evolving processes with harmon.ie

When it comes to information stored in email, however, and getting it into a company intranet, SharePoint and Microsoft Outlook are disconnected. Information from email has one way of being transferred to SharePoint — through manually copying down information or manually pasting attachments in the correct file destination. The harmon.ie Outlook sidebar changes that. Creating a seamless transition of information between email and SharePoint (using links, not attachments), it has been one of the driving forces behind RSPB's change in information management practices and culture:

*"Using harmon.ie is helping us better manage our information, especially the really important stuff. The documents we need to keep, like our records and any corporate information, are easier to access and more secure."*

At the heart of that change has been the switch from document attachments to links. The traditional way RSPB had been sharing information from email was convoluted: a proliferation of attachments were flying around the organization. So, if someone sent around a document for feedback via an attachment, every response would come back as a separate document with individual changes.

By using links with harmon.ie, that feedback is accumulated in a single location within SharePoint. This is a gamechanger for RSPB—helping get workers out of their email and instead sharing and collaborating on documents together. harmon.ie has enabled RSPB to capture corporate information in a more streamlined and holistic manner, and has encouraged the best practice of information management in the process.

## The traditional approach to document management

SharePoint has been viewed as the solution to creating structured document management. Sophisticated document storage, sharing, and collaboration features allow documents to move freely between coworkers while remaining easy to locate and access when needed and secure. The implementation of SharePoint Server at RSPB enables collaboration and instills standardized processes for document management.

RSPB organized information in SharePoint through document libraries, using a certain amount of default metadata with them. Single metadata tags were used to decide the document type: from briefs to proposals to land management documents. Based on the metadata tags, information was split into two distinct document libraries: one for standard corporate documents—people, health and safety guidelines, research, project management, etc.—and one for the conservation side of things—digging ditches, building predator fences, etc. For RSPB, document sets have been the core method of grouping information within the organization.



## A system that works so you can too

As more workers at RSPB are witnessing how a streamlined approach to information management can take them out of the confines of their email inbox and make their day-to-day work easier, RSPB is excited to see how far harmon.ie can take them. As RSPB makes the move from SharePoint Server 2010 to SharePoint Online and the cloud, they are also looking to implement more harmon.ie solutions in the future.

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