

Mind the gap

A better way to manage
emails in SharePoint



The Exchange–SharePoint gap

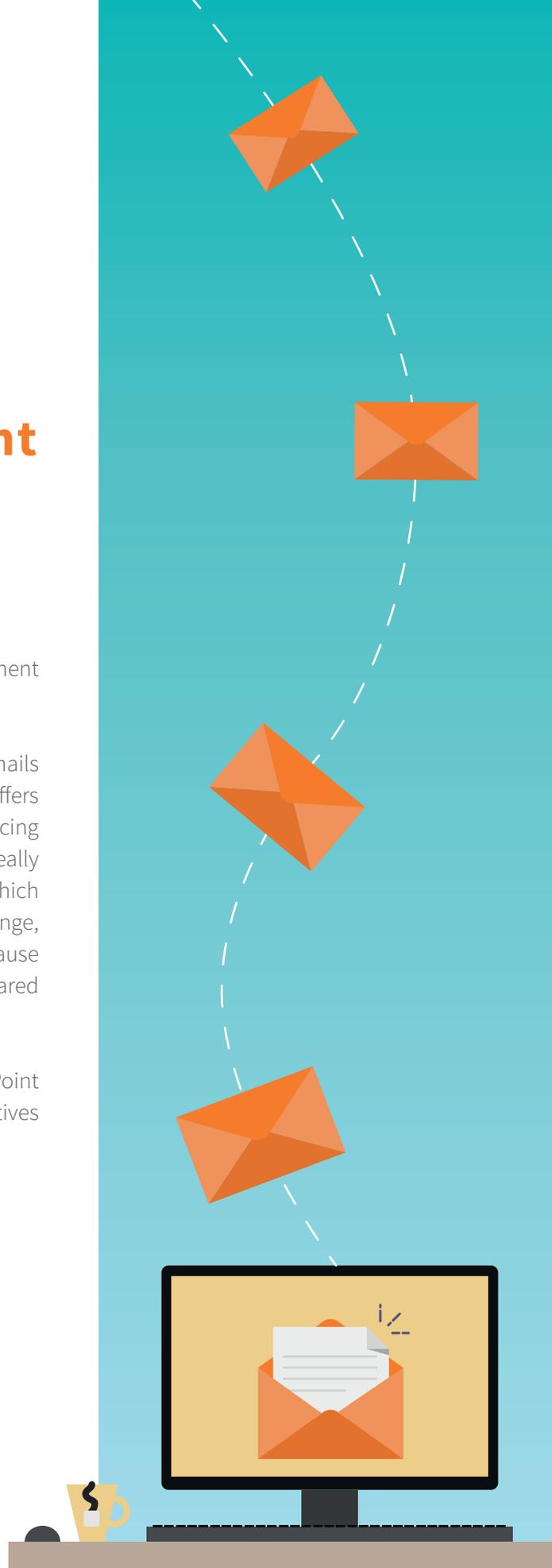
Email is as crucial as ever in the workplace. Yet email management remains a challenge for most organizations.

The Microsoft email offering is Exchange, which means that emails are stored on the Exchange Server. In contrast, Microsoft offers SharePoint for document management. A key issue facing businesses today is that many important emails are really organizational documents, like proposals and contracts, to which colleagues often need access. But, by storing emails in Exchange, important information is made inaccessible to colleagues because it is isolated in personal inboxes and disconnected from shared repositories.

This disconnected experience, caused by the ‘Exchange–SharePoint gap’, leads to work breaking down and to business-critical initiatives failing.

In this eBook, we will discuss:

- The role of email in the modern workplace
- The Exchange–SharePoint gap
- Why Microsoft’s ‘out of the box’ approach to managing emails fails to solve the problem
- Intuitive email management - the [harmon.ie](#) solution

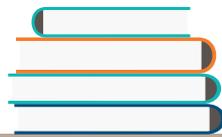
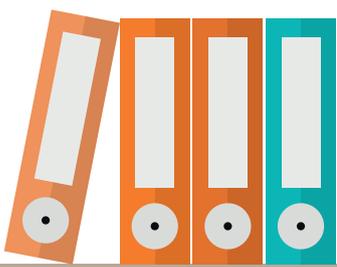


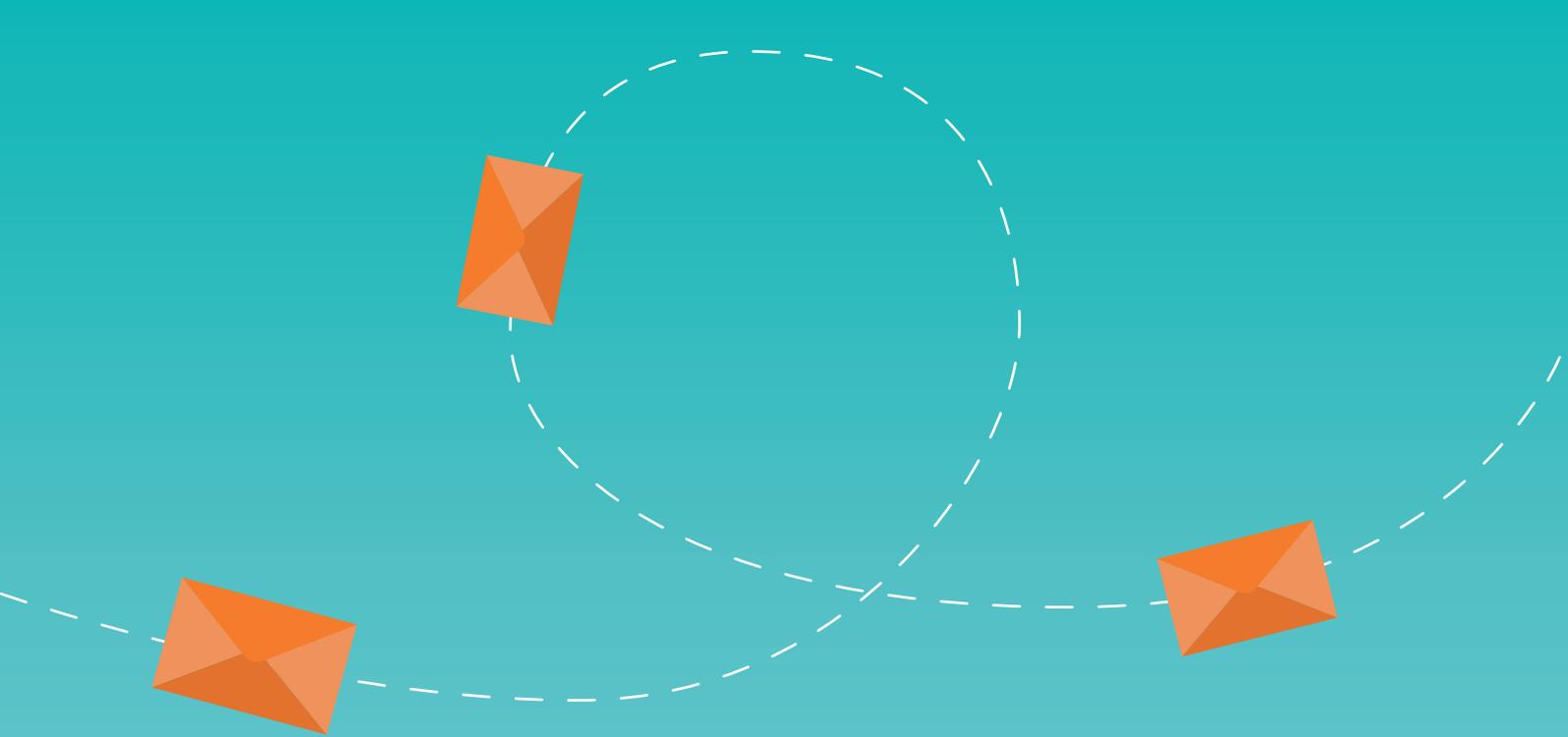
The role of email in the modern workplace

Email in the modern workplace

The modern workplace has brought in new communication and collaboration tools such as Microsoft Teams and Slack. Part of the Office 365 package, Microsoft Teams allows users to send instant messages, make video calls, and collaborate on documents in real-time. On the back of these new apps entering the workplace, people have begun to predict that email has finally had its day.

It may be true that these apps will have a significant part to play in the future, but it certainly isn't the case that their arrival will bring about the end of email. In fact, despite the adoption of the apps, we expect email to be around for many years to come.



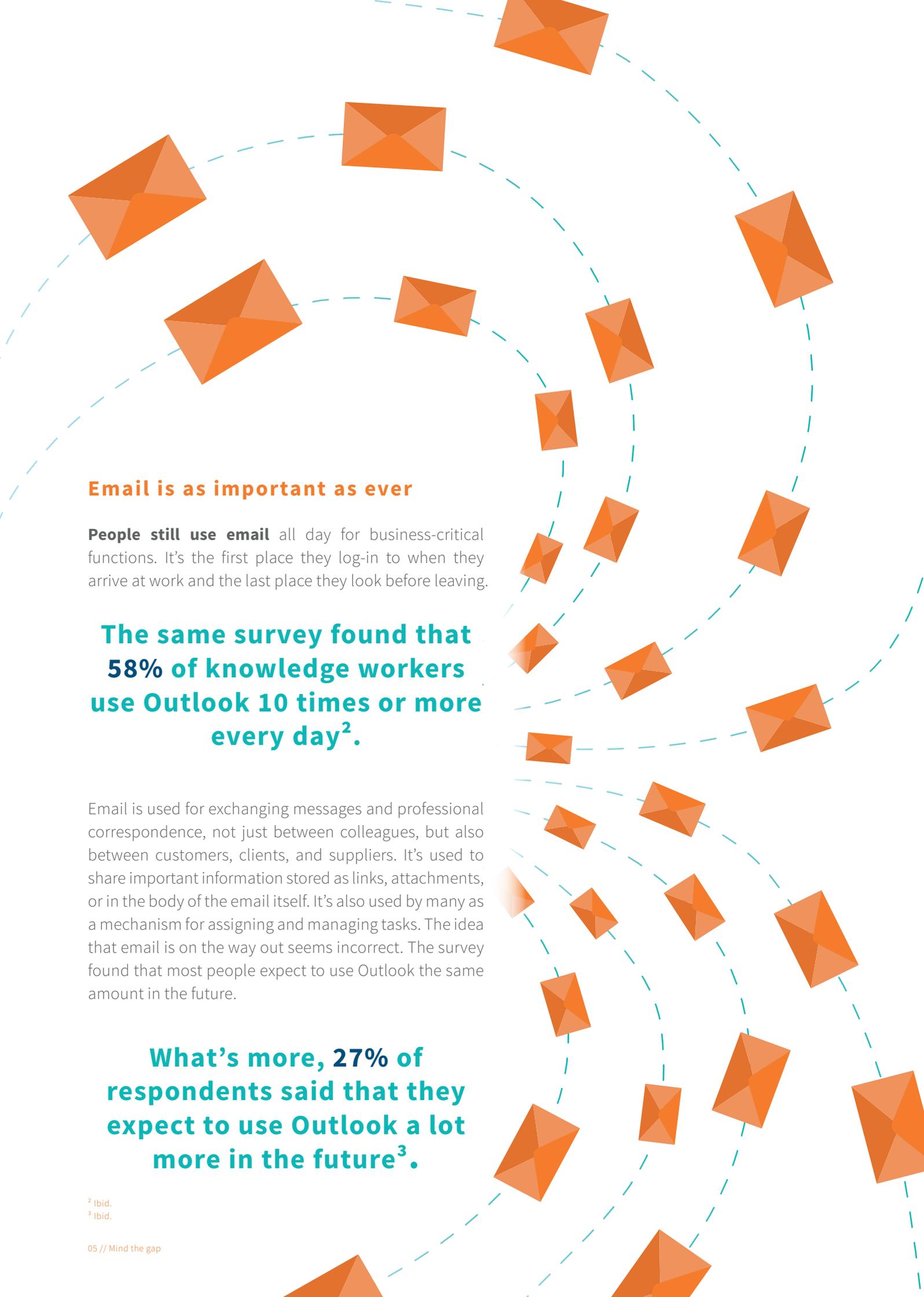


Microsoft Teams has a fairly low user adoption rate, with many organizations struggling to convince their employees to use the platform. This was supported by a recent survey conducted by harmon.ie, The Office 365 app usage report 2018. While **75%** of respondents said email was one of their top three most used apps, only **16%** selected Teams in their top three¹.

The report surveyed over 1,000 business professionals to find out which Office 365 apps were being used by knowledge workers. The results show just how important email (and Outlook, in particular) is for knowledge workers in the modern workplace... and how it will remain so for the foreseeable future.



¹ harmon.ie, 2018, The Office 365 app usage report 2018. Available at: <https://pages.harmon.ie/Office365-2018-survey-report-registration.html>



Email is as important as ever

People still use email all day for business-critical functions. It's the first place they log-in to when they arrive at work and the last place they look before leaving.

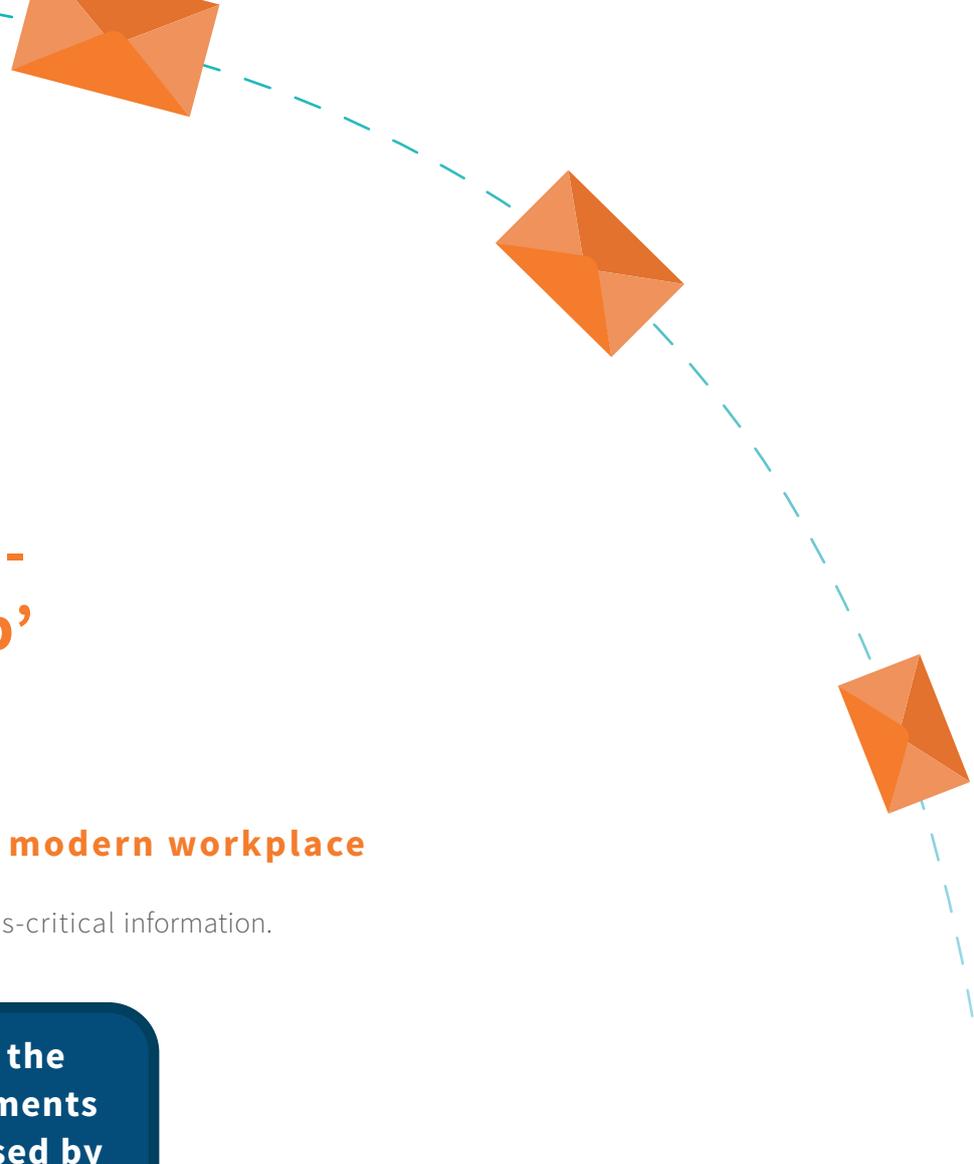
The same survey found that 58% of knowledge workers use Outlook 10 times or more every day².

Email is used for exchanging messages and professional correspondence, not just between colleagues, but also between customers, clients, and suppliers. It's used to share important information stored as links, attachments, or in the body of the email itself. It's also used by many as a mechanism for assigning and managing tasks. The idea that email is on the way out seems incorrect. The survey found that most people expect to use Outlook the same amount in the future.

What's more, 27% of respondents said that they expect to use Outlook a lot more in the future³.

² Ibid.

³ Ibid.

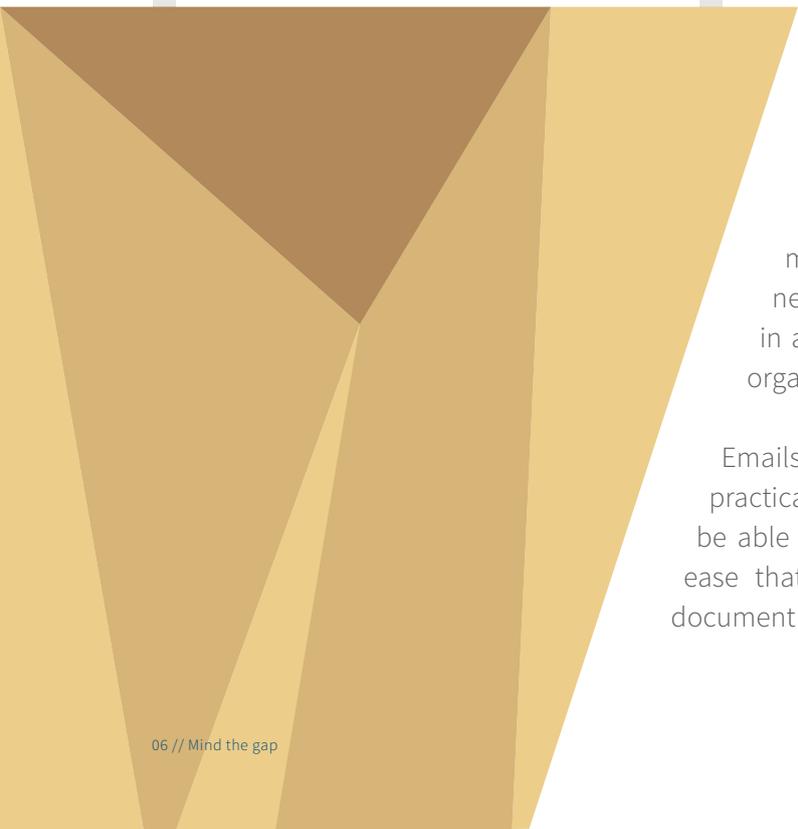


The ‘Exchange - Sharepoint gap’

The role of email in the modern workplace

Emails regularly contain business-critical information.

According to research, the majority (80%) of ‘documents of record’ created and used by organizations are emails, with only 15% being documents and 5% workflows⁴.



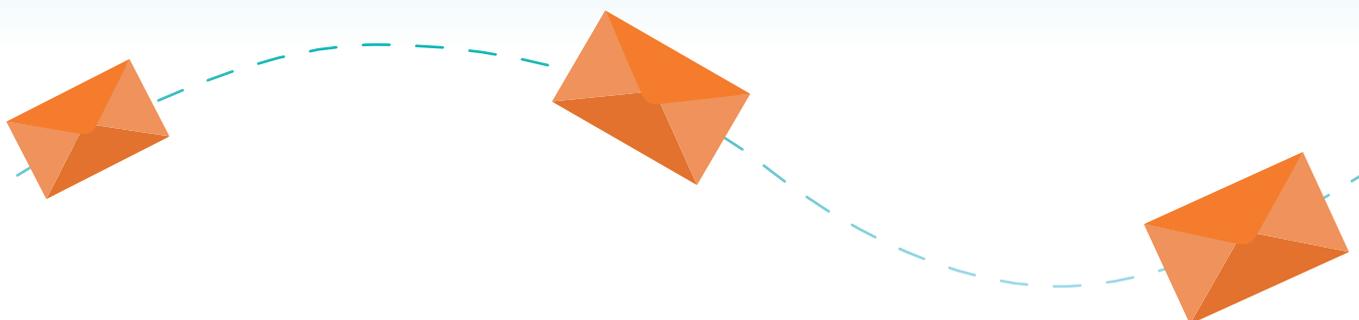
When emails are stored in Exchange, this important information is isolated in personal inboxes and inaccessible to the rest of the organization. This Exchange–SharePoint gap reduces email management into chaos. Whether it’s for knowledge retention, compliance, records management, auditing, or discovery, organizations need to be able to store, classify, and then access emails in a shared space (i.e. SharePoint) where the rest of the organization’s documents are kept.

Emails need to be treated just like documents – because, practically speaking, that’s what they are. Employees should be able to store, classify, and retrieve emails with the same ease that they have come to expect with other files and document types. Otherwise, life is made needlessly difficult.

The Exchange–SharePoint gap creates several barriers to productivity:

- It's difficult and time-consuming to find emails, including those that hold important information
- When colleagues are absent or leave the organization, important information can be lost forever
- Colleagues will find it hard to collaborate on documents that they cannot easily access
- When the only proof of correspondence is in email, there is an increased risk of falling short of compliance or regulatory requirements
- When the only copy of an email is stored in a personal inbox, without a backup copy being made, the danger of loss or deletion increases

Even in Office 365, where everything is accessible across the same platform, emails and documents are still siloed. With emails in Outlook and documents in SharePoint Online, there is still a gap that needs to be bridged.



⁴ RIMtech. 2016. The Role of Email in RIM Compliance.
Available at: <https://pages.harmon.ie/information-governance-EN-wpaper-registration.html>

Microsoft attempts to bridge the gap

Microsoft has made attempts to make email management easier. It offers four main capabilities ‘out of the box’ within Outlook to improve how emails are managed:

- **Archiving** – the archive and auto-archive functions allow Outlook users to move old items that they want to keep into a virtual archive.
- **Search** – search can be used to quickly locate information within emails and in attachments when it is required.
- **Outlook rules** – with rules, users can set up actions to be carried out on incoming or outgoing messages when certain predetermined criteria are met. The rules come in three different categories: ‘Stay Organized’, ‘Stay Up to Date’ and ‘Start from a Blank Rule’. These provide a degree of control over how emails are managed in your own personal inbox. A good example is that you could set a rule that automatically saves all emails that include the word ‘compliance’ in a specific folder of your choice.
- **Labels** – labels are a new way to identify different types of content as needing an action to take place. For instance, some documents received via email may need to be permanently deleted, others might need to be retained for a minimum period, and others may need to be marked as a record so that it is never edited or removed. Labels allow you to pre-configure these and automatically pull emails into label categories using Outlook rules.



‘Out of the box’ Microsoft doesn’t go far enough

Although these capabilities do offer users more control over their documents and data, the same problems with disconnected information persists. Important information in emails is still stuck in personal inboxes – it has not been put into SharePoint, so it cannot be used by other colleagues and the wider organization. Important emails will still be lost when employees leave the organization or are on leave. Compliance issues still exist if emails cannot be easily retrieved. And better and more intelligent search functionality needs to be extended across the organization and not just limited to personal inboxes.

Deep work – the ability to focus on core tasks without distraction – is essential for productivity in the modern workplace. Taking workers away from their core tasks to carry out Microsoft’s overly-complicated and time-consuming ways of classifying and searching for emails is not productive. Knowledge workers should be able to manage their email in a few clicks, without having to think too hard about it. It should be quick, easy, and intuitive to find the information they need whether it’s an email or any other type of document.

It’s for these reasons that ‘out of the box’ solutions offered by Microsoft don’t go far enough. As long as the Exchange-SharePoint gap exists, organizations will lose out.

“Important emails will still be lost when employees leave the organization or are on leave”

Making email management in SharePoint easy and intuitive

Knowledge workers need a solution that makes it easy to store emails in the right place. This way, emails are always accessible to those who need them, when they need them. Good information governance, effective collaboration, and successful case management all depend on information being accessible organization-wide.

If other documents are stored in SharePoint, organizations need a solution that makes it easy to manage emails in SharePoint. With one central location for email that is easy to access, manage, and store emails in, organizations can significantly reduce email chaos.

What's more, productivity is dependent on a worker being able to perform deep work. And deep work relies on knowledge workers being able to access information when they need it without obstacles. Instead of struggling to find important information and wasting valuable time, emails can be accessed quickly, enabling knowledge workers to concentrate on high-value work.

Making email management in SharePoint easy and intuitive

How harmon.ie bridges the gap

The harmon.ie add-in for Outlook brings the user's SharePoint experience into their Outlook interface where people already spend their work time, providing all the capabilities required for effective email management, while enabling colleagues to view and share important emails.

harmon.ie allows users to:

Drag and drop emails into SharePoint from the Outlook client

Auto-capture email messages from Outlook and move them directly into SharePoint

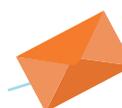
Auto-save emails in SharePoint from Outlook with "Save Draft" and "Save on Send" functionality

Collaborate with colleagues and/or clients using email messages and the information contained once it's stored in SharePoint

Classify email messages with metadata when uploading them to SharePoint – for instance, harmon.ie prompts the user for additional information and helps them tag information correctly

Discover documents and emails from SharePoint effortlessly, with the ability to find, re-use, and retrieve emails once they're saved in SharePoint

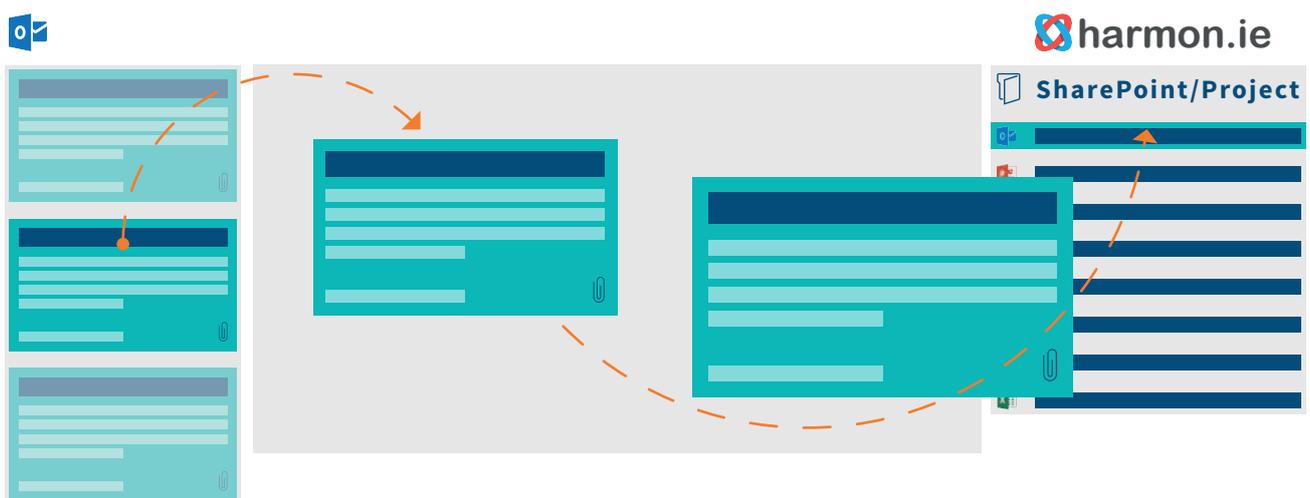
Intelligently recommend locations on SharePoint to store emails, based on other user behavior and based on topics extracted from the emails themselves



harmon.ie leverages the power of topic computing to provide a host of advanced features for email management in SharePoint. Topic computing uses artificial intelligence to process and organize information into topics – the way the brain normally does. When it comes to email, this means automatically recommending the right places to save emails and automatically filling in metadata, which makes it incredibly easy for knowledge workers to store emails in SharePoint with all the correct and relevant metadata.

For instance, if you receive an important email from a customer containing a contract, harmon.ie not only provides the ability to drag and drop the email into SharePoint, but it uses topic computing to automate the process of filling out the metadata required to store the email correctly. Based on the information contained in the email, harmon.ie understands what type of contract it is, that it is important, where it needs to be saved, and automates the process of filling in the relevant metadata for you (e.g. name, date, sender etc.), including providing a unique name for the email item in SharePoint. What would have taken a few minutes is completed instantly, and risk of human error is avoided.

harmon.ie now allows users to automate email capture using Outlook rules to store emails directly into SharePoint. Not only does harmon.ie identify the right emails and transfer them to the correct SharePoint folder, but it offers the option to delete the files in Outlook so work isn't duplicated.





harmon.ie – a better way to manage emails in SharePoint

When email is such an important part of the modern workplace, effective email management should be a given. With emails stored in Exchange and other documents in SharePoint, Microsoft leaves its users in email chaos. Organizations need a solution to bridge the Exchange–SharePoint gap.

harmon.ie helps knowledge workers manage emails more accurately and consistently by bringing SharePoint and Outlook together. harmon.ie uses innovative AI-powered technology to add contextual search, automatically-generated ‘topic’ metadata, and automatically-generated location recommendations for storing emails, to take email management to the next level.

For business users that spend all day working in Outlook, harmon.ie provides all the capabilities they need to bridge the information gap between Outlook and SharePoint and help get their work done efficiently.

To find out more about effective email management, get in contact with harmon.ie today.



+1 800-624-6946 – USA



+44 1494 358340 – UK



+49 715 2602 3001 – GER



www.harmon.ie