



Harmon.ie

An Outlook extension game changer for SharePoint and Collaboration

Prepared By

Grant Margison
Director

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Harmon.ie – making work better

As information and knowledge management experts we are supposed to be good at behaviours like putting emails into our SharePoint system. And yet, until recently, our performance has been patchy at best. Like everyone else, we are busy, distracted and trying to just get through our ‘to do’ lists.

A client introduced us to Harmon.ie a few months ago and we have not looked back. This has made a huge difference to how we effectively work in Outlook (for email) AND SharePoint for documents and collaboration AT THE SAME TIME.

This reinforces learnings we have had from recently assignments. Increasingly, to try to get to the heart of how to make work better, we are running observational studies. This means that we observe, in a structured way, a cross-set of people inside an organisation to find out how their tools are helping or hindering them in getting their work done. What we have been seeing is striking. When equipped with Outlook, Windows Explorer, SharePoint, and CRM, without these tools knitted together in any meaningful ways, peoples work was harder not easier.

The default behaviour, universally, was that people reverted to everyone’s favourite document management system – Outlook. Yes, they defaulted to their “email cockpit” – doing pretty well everything in Outlook via email – including sending emails of important content to themselves for future reference.

Harmon.ie offers the modern knowledge worker a better way of working by streamlining the process of filing and finding content in SharePoint using the Outlook toolset that is highly familiar and already adopted by 99% of users. In the diagram below we show a screenshot some of which you may well recognise. This is a standard view of an Outlook inbox except for the right hand pane which brings SharePoint directly to the user *where they work*.

The screenshot shows an Outlook window with the following components:

- Outlook Interface:**
 - Top bar: FILE, HOME, SEND / RECEIVE, FOLDER, VIEW
 - Search: Search Current Mailbox (Ctrl-E)
 - Left pane: Favorites (Inbox 1257, Sent Items 196, etc.), Current Mailbox (Date: Today, Yesterday, etc.)
 - Bottom bar: Mail, Calendar, People, Tasks
- Harmon.ie Sidebar:**
 - Navigation: All Sites, Knowledge Base, EVENTS, Conferences, Workshops, Seminars, iLabs
 - Table of Documents:

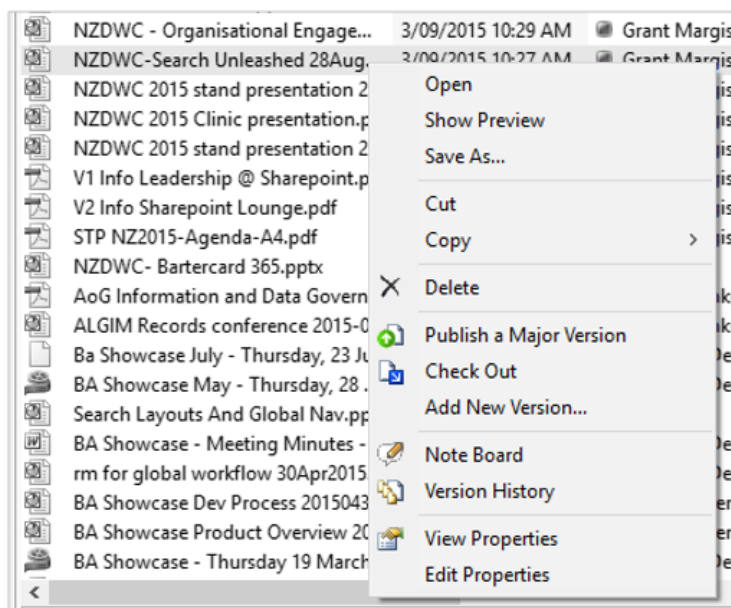
Name	Modified	Modified By	Docume...
RE Greg work plan update_2015-0...	15/09/2015 6:09 AM	Grant Margis...	
Notebooks - answers_2015-09-14...	15/09/2015 6:09 AM	Grant Margis...	
BA Showcase Search.pptx	10/09/2015 11:21 AM	Ian Morrish	
NZDWC - Organisational Engage...	3/09/2015 10:29 AM	Grant Margis... PRESEN	
NZDWC-Search Unleashed 28Aug...	3/09/2015 10:27 AM	Grant Margis... PRESEN	
NZDWC 2015 stand presentation 2...	1/09/2015 8:24 AM	Grant Margis... PRESEN	
NZDWC 2015 Clinic presentation 2...	30/08/2015 11:31 AM	Grant Margis... PRESEN	
NZDWC 2015 stand presentation 2...	26/08/2015 3:02 PM	Grant Margis... PRESEN	
V1 Info Leadership @ Sharepoint.pdf	24/08/2015 5:16 PM	Grant Margis... MODEL	
V2 Info Sharepoint Lounge.pdf	24/08/2015 5:16 PM	Grant Margis... MODEL	
STP NZ2015-Agenda-A4.pdf	24/08/2015 5:12 PM	Grant Margis... PRESEN	
NZDWC - Bartercard 365.pptx	21/08/2015 5:02 PM	David Seel	PRESEN
AoG Information and Data Govern...	28/07/2015 2:19 PM	Paddy Plunket	PRESEN
ALGIM Records conference 2015-0...	28/07/2015 1:48 PM	Paddy Plunket	PRESEN
Ba Showcase July - Thursday, 23 Ju...	23/07/2015 2:40 PM	Katherine De...	PHOTO
BA Showcase May - Thursday, 28 ...	28/05/2015 2:38 PM	Katherine De...	
Search Layouts And Global Nav.pptx	28/05/2015 2:31 PM	Ivan Peters	PRESEN
BA Showcase - Meeting Minutes - ...	1/05/2015 8:57 AM	Katherine De...	MEETIN
rm for global workFlow 30Apr2015...	1/05/2015 8:34 AM	Katherine De...	PRESEN
BA Showcase Dev Process 2015043...	30/04/2015 10:35 AM	Kristy Archer	PRESEN
BA Showcase Product Overview 20...	30/04/2015 10:35 AM	Kristy Archer	PRESEN
BA Showcase - Thursday 19 March...	22/03/2015 4:21 PM	Katherine De...	PRESEN
BA Showcase 2015-03-19 - Smart B...	19/03/2015 12:31 PM	Helen Bennett	PRESEN
BA Showcase Product Overview 20...	19/03/2015 11:51 AM	Anita Rapson	PRESEN

Why it's different

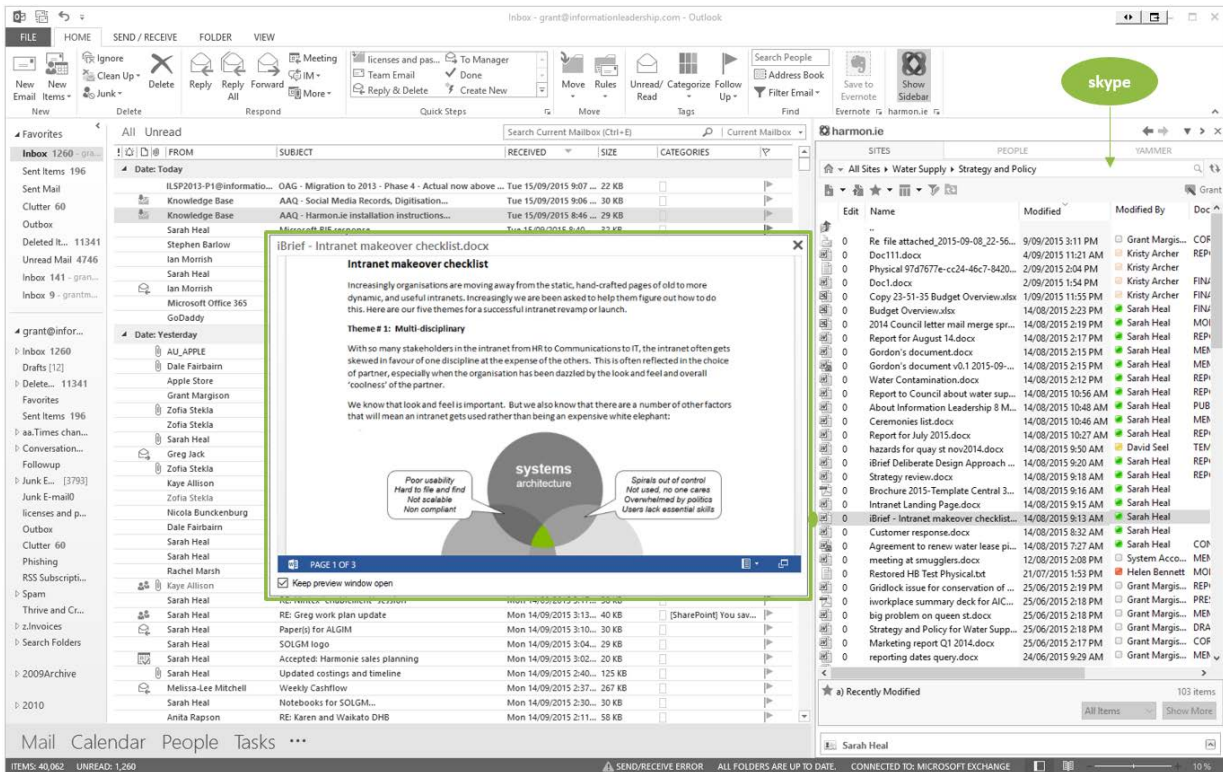
The secret sauce here is not just displaying both content environments (Outlook and SharePoint) at the same time, but how they have avoided the irritations of other Outlook add-ins. Significant improvements include:

- **Almost instant adding of new sites and libraries** – usually 5-10 seconds to add and see them
- **Giving SharePoint the screen real estate it needs.** Not using the left hand column of Outlook for SharePoint drag/drop folders that is already too busy, meaning that most SharePoint folders (in other Outlook add-ins) are below the fold of the page so users have to scroll down to drag and drop.
- **Libraries, Lists and folder views.** Being able to be selective about what libraries and folders are available plus allowing for favourites quick selection
- **Easy Centralised provisioning.** The various set up options can be chosen by the user through an options menu or centrally managed via registry settings pushed out to client PCs. This includes pre-populating the libraries, lists and folder views that will be available to users (and then they can add more if they wish)
- **Fast to load and stable** – because the integration with Outlook has a small footprint

This includes a full range of SharePoint functionality within the Outlook interface (and a 'quick load' show review file option)



This includes **file preview** within Outlook, and Skype access to authors for instant collaboration, by right clicking on the colour coded icon by their name:



Helping us all “do the right thing”

The increased adoption also comes from **catching the user at the right moment** in their email related process.

Both from Outlook to SharePoint and vice versa.

YOUR DIGITAL WORKPLACE

Outlook

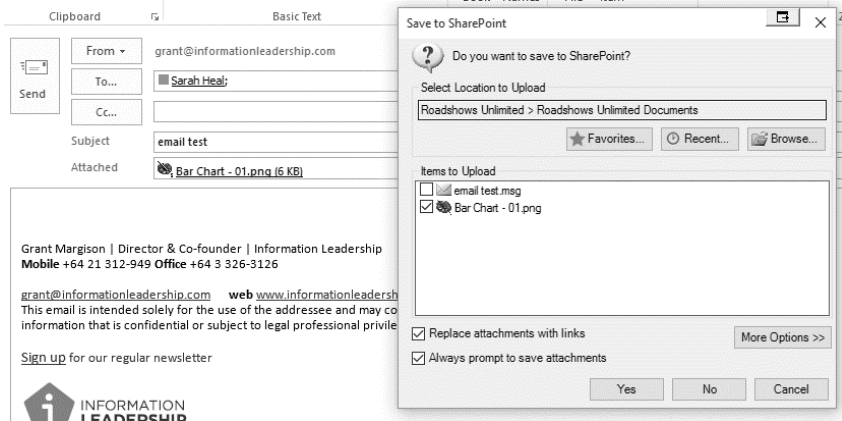
Mail; Calendar; People; Tasks...

Harmon.ie

SharePoint; Skype for Business; Document Collaboration; Yammer

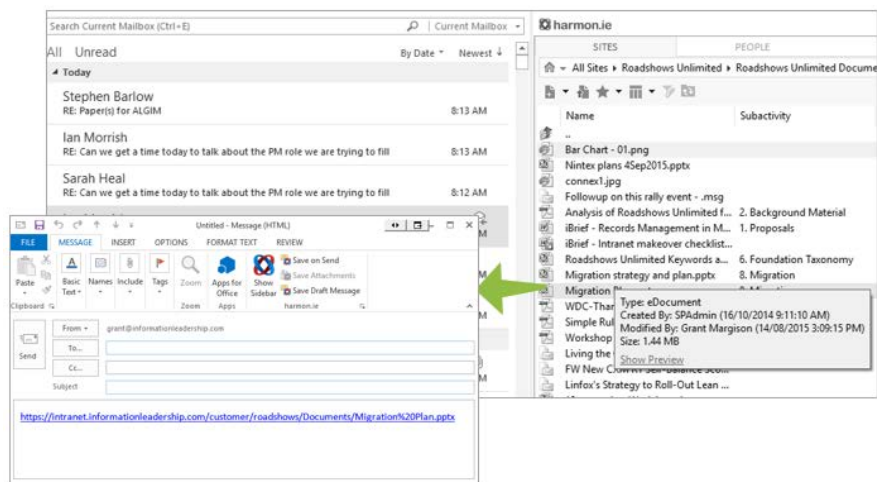
Adds an attachment(s) from file share to an email

Harmon.ie asks whether this (or these) should be saved in SharePoint. If so, it saves it in the chosen library and allows the user to add metadata. The user can also tick a box to now send the attached file as a link.

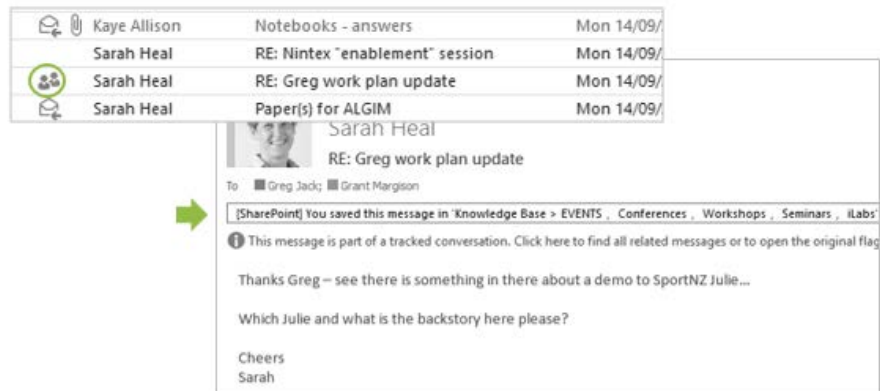


Drag file(s) from a library to the Outlook pane

New email box pops up with a SharePoint link to the file. An ALT drag would add the file as an attachment instead (for outside people). The ALT behaviour can be switched to adding a link, as part of the setup options for the user.

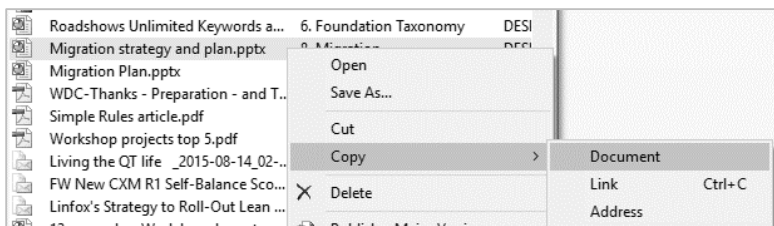


Shows what emails have already been saved, who did this & where they are stored in SharePoint



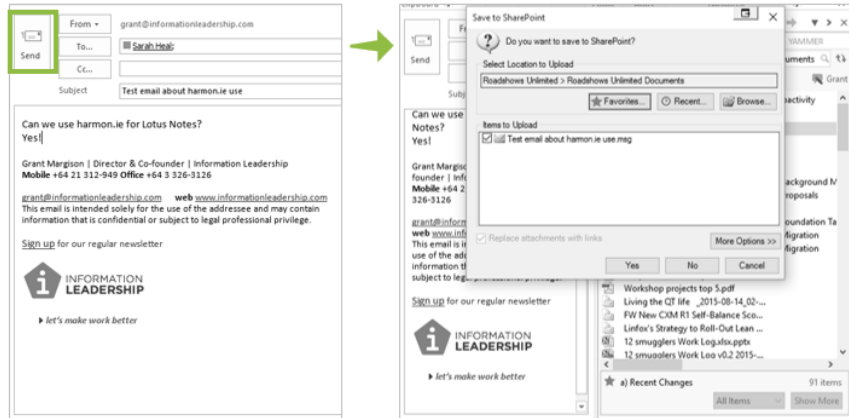
Copy documents between libraries

One or more files to be "copy" and "pasted" from one document library to another.



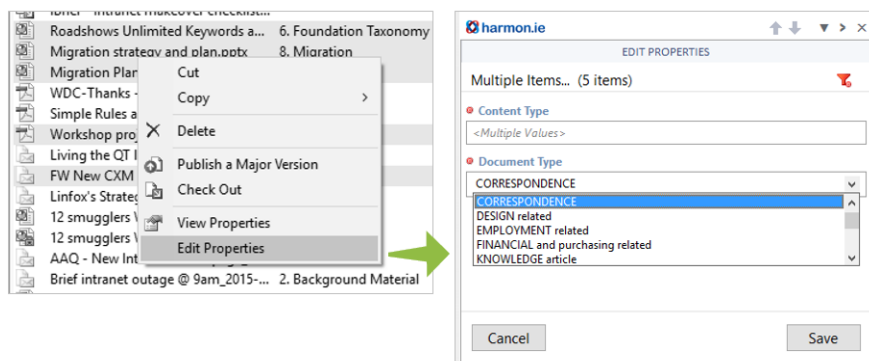
Prompts to save emails & attachments in SharePoint on "Send"

User can quickly navigate to the right library via browse, favourites or recent.



Metadata can be updated for files in bulk, just by multi-selecting them

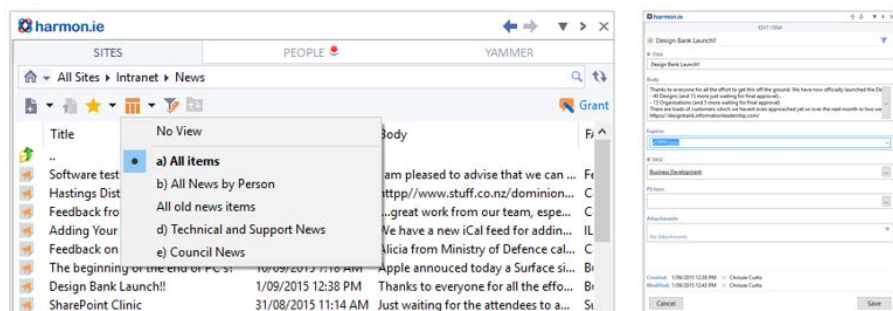
This is great for emails with attachments, but also for quick updates of metadata for existing SharePoint files.



This is also great for ad-hoc file share migration by drag/dropping into Harmon.ie pane from Windows Explorer

Lists as well as libraries

Users can access list items, edit them & add new entries.



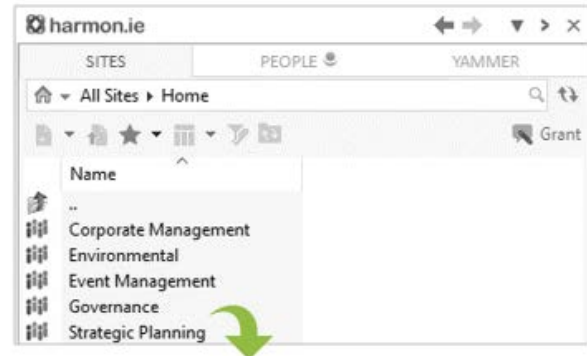
It can become your default way of working with SharePoint...

As the SharePoint location is exposed as a breadcrumb, users can navigate between sites, lists and libraries within a site collection. All common file, find and edit actions can be accomplished quickly and easily. This really opens up EDRMS and SharePoint for all users...

Browse and pick favourites

Users can browse through the organisation's content, as it is held in site collections, sites, libraries, lists and folders. In the example to the right, there is a site collection for each of the functions of the organisation.

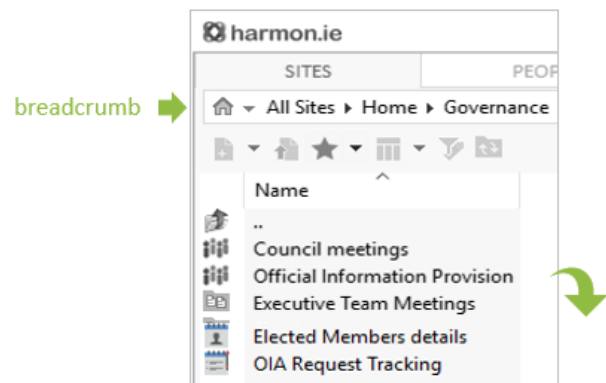
A user can pick any of these assets to add to their personal favourites list, for quick access.



Access Governance activities and lists

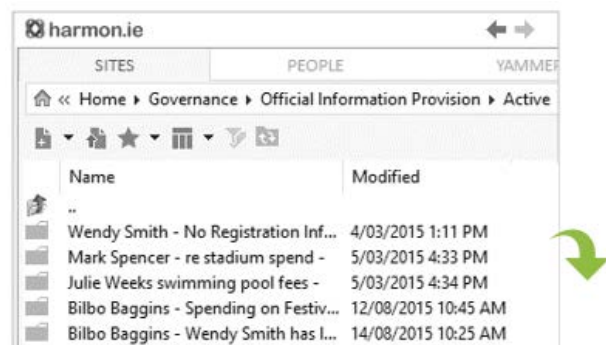
Clicking on Governance then shows the sites that are activities of this function as well as some lists that are used to help manage it. Notice how the breadcrumb now shows you where you are in the hierarchy and you can click up the chain as needed.

You could then open say the Elected Members Details list or OIA Tracking list or one of the shown document libraries.



Access case files

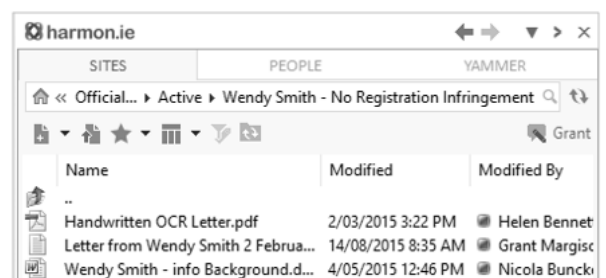
If we go into Official Information Provision library we see the case files that are underway. Clicking on any of these would then show the documents within each case file folder. Notice how the breadcrumb updates to make it clear where we are and to give us easy navigation back up the chain...



Access content

Here we are seeing the documents for this case file. We can preview them, read or edit them, update version, theme etc from here.

If we were working on this case file, we could set this location as a favourite, so it would be quick to come back to, or send documents or add emails etc

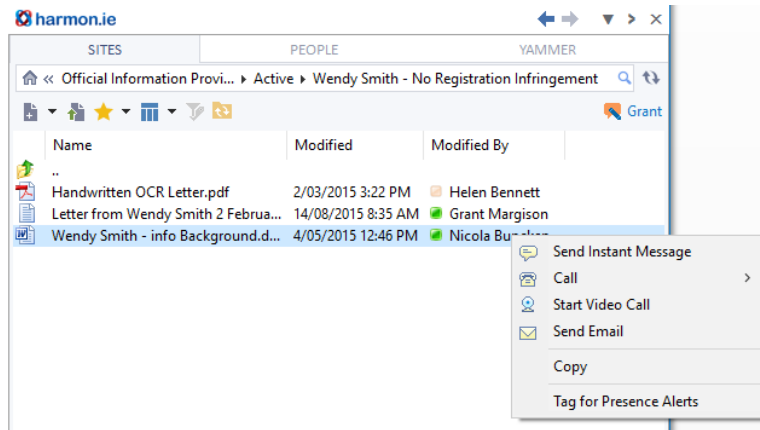


There's more – Skype, Document Collaboration and Yammer

Harmon.ie brings in the informal side of creating documents – how we work together. Instead of the “work together” bit being extra and using yet another set of tools, the Harmon.ie tabs include this:

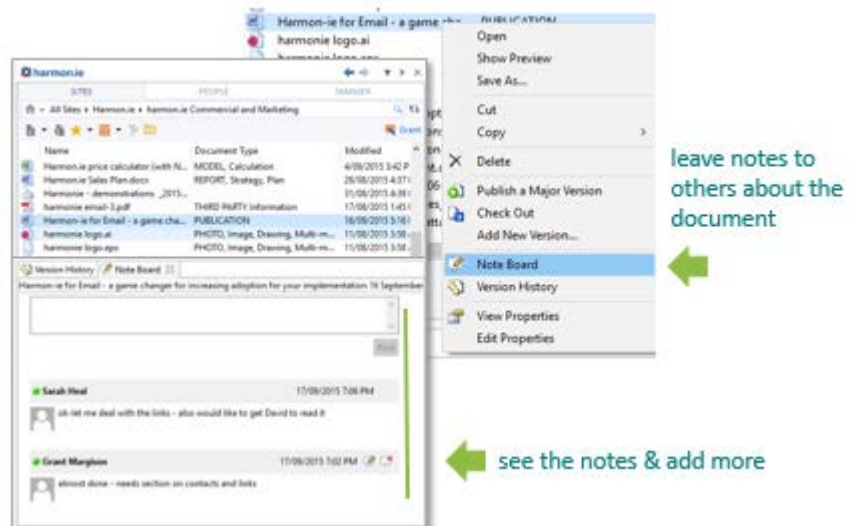
Skype for Business

While viewing document details, allows you to contact authors such as Helen, Grant or Nicola immediately, using IM, audio or video calls.



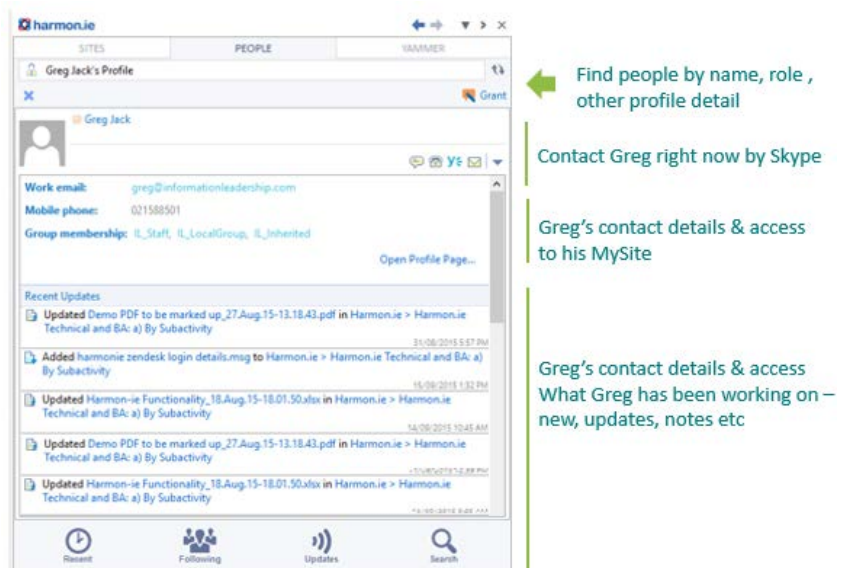
Document Level Collaboration

Allows anyone working on the document to leave instant message style notes for others. As the panel remains open in outlook, you can see updates and add your own in real time. Notes are then saved and available for review.



Find & interact with people

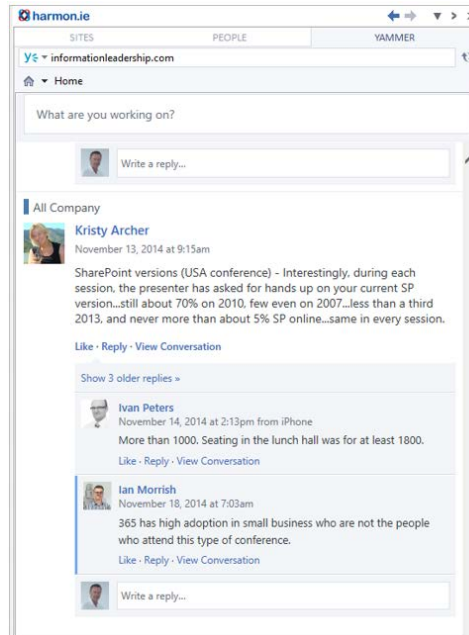
Via the “People” tag you can search for people, access them by Skype for Business and see what they are working on



Yammer

Brings together all your Yammer feeds. This is great for collaboration that may include or be centric on people outside of your organisation.

It is also particularly useful in exploring a topic that is not necessarily bound or about one document.



the Yammer domain

start a new conversation

conversation in a group

how I can immediately reply

Harmon.ie – who are they?

Harmon.ie is well established in Europe and USA, with major implementations across many sectors, with its Outlook and tablet solutions for SharePoint and Lotus Notes.

See <https://harmon.ie/customers>

Information Leadership is now a Harmon.ie partner for New Zealand and Australia and we have upskilled to learn about how the technology works and how to tune it for different use cases.

Special pricing till 31/12/2015

We have negotiated special New Zealand discounts that are locked into \$NZ pricing so you don't need to worry about currency fluctuations. This includes a swap out offer for those with Open Place Mail and Colligo licenses.

Find out more, try it out?

**Let's talk and/or
arrange a demo**



Kaye Allison
Customer
Advocate

Talk to our Customer Advocate, Kaye about what is of interest to you and the discounts and swap out deals that are on offer. She can arrange for technical calls or visits from our Directors or consultants.



Greg Jack
Consultant and
Harmon.ie
specialist

Greg has recently joined us from Antarctica NZ, where he lead over a number of years their iWorkplace SharePoint compliance grade document management and ERP implementations.

With Information Leadership he is the lead on understanding and deploying Harmon.ie. He has excellent contacts into Harmon.ie itself so is the right person to contact for any questions on the technical, integration or functionality.

Time to try it out?



There is no better way that to get Harmon.ie installed on your PC and try it out. Kaye can arrange trial license for you that Greg or others can support and walk you through the options.

More resources



Harmonie have a wide range of resources you can access via their website (<https://harmon.ie/>)

Their blog of interesting and varied articles on SharePoint, Lotus Notes and collaboration
<https://harmon.ie/blog>

Short Videos at <https://harmon.ie/videos> including:

Working with Documents

<https://harmon.ie/videos/harmonie-email>

Harmon.ie for Notes video

<https://harmon.ie/videos/harmonie-email-notes-edition-rfp-demo?full>

Short Videos on their tablet/smart phone product

<https://harmon.ie/videos/harmonie-mobile>

The last word

The last word has to be from Brendon Pilott, our leader of technical support and operations.

Those that know Brendon see him as technically very competent and a person with a real pragmatic bias – for him to use a tool, it's got to be better than what he uses today. Here is his experience of harmon.ie for Outlook:



Brendon Pilott
Technical Consultant

BSc Software
Engineering

MCITP
MCTS

I am personally using harmon.ie constantly throughout the day to upload emails to open support requests, as the does the support team in general. Overall dozens of emails every week are being added to the support site. Instead of 'binge' uploading a lot of emails at once because it has to be done, or only uploading the important ones, emails are being uploaded on the fly.

Key benefits over what we were previously using:

- 1. Fast and does not cause issues with Outlook add-ins*
- 2. Having harmon.ie open does not lockup outlook, I can still do other things*
- 3. Harmon.ie exposes real SharePoint library views so I only see the content I want to see*
- 4. Harmon.ie is intelligent and offers to add favourites for places I visit often*
- 5. The interface is intuitive*
- 6. The space it uses on the right hand side is not overbearing, I just leave it open, but if I want to close it I can do so with a single click.*