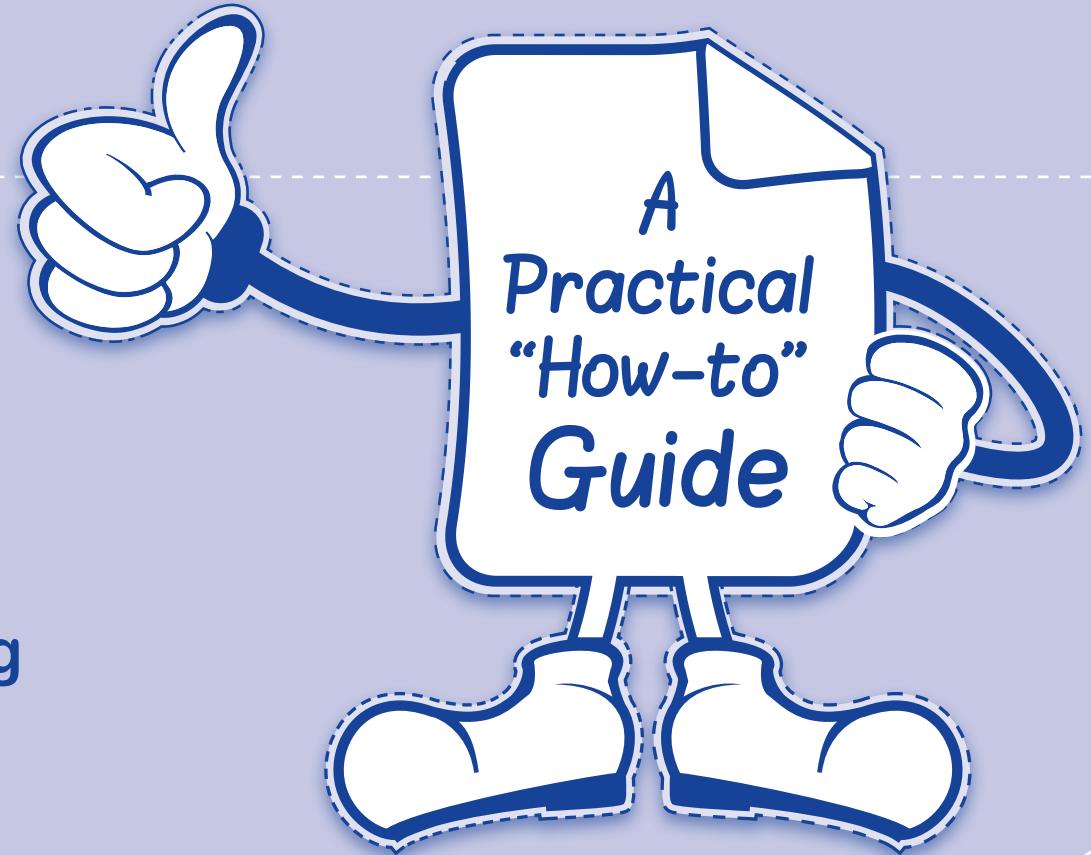




10 STEPS

To Streamlining Contract
Negotiations by Eliminating
Document Chaos



This ebook details step-by-step guidelines for exchanging contract documents using Microsoft® SharePoint®. harmon.ie simplifies each step by providing full-featured access to SharePoint from within Microsoft Outlook® or Lotus Notes®

Background

During contract negotiations, people waste considerable time searching for the most up to date document containing the latest revisions.

Trying to reconcile internal comments with those from the external negotiation partner is not easy.

This ebook details step-by-step guidelines for exchanging contract documents using Microsoft® SharePoint®.

A sidebar shows how harmon.ie® simplifies the process, for each step.



Did you know

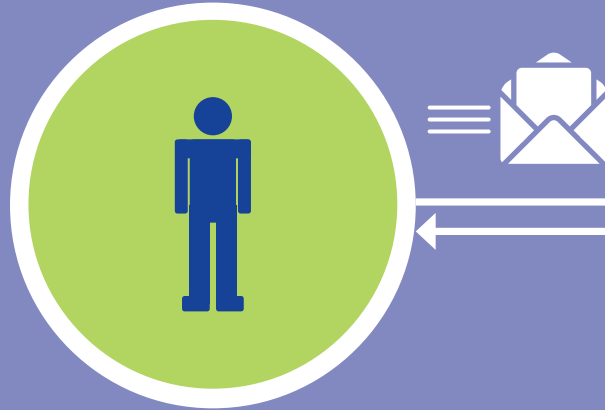
People waste an average 30 minutes a day (16 days a year!) searching for documents, primarily in their email Inbox, according to a recent industry surveyⁱ.

Sending attachments back and forth creates confusion and chaos.

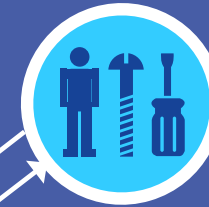
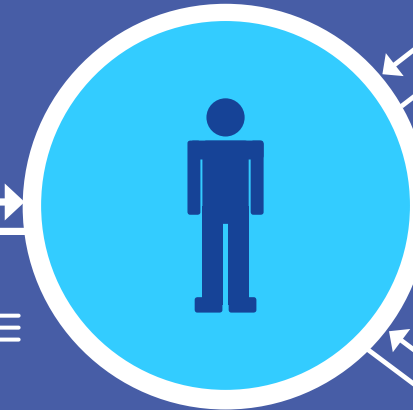
Source: March 2011 uSamp survey of 515 IT users commissioned by harmon.ie. Respondents work in US and global businesses of all sizes, in sales, marketing, human resources, or legal departments and are at least 20 years old. <http://harmon.ie/news/i-cant-get-my-work-done-enormous-impact-distractions-workplace>

Document Flow

BUYER



SALES



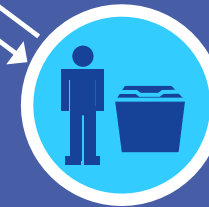
Professional Services



Finance



Legal



Product



Setup

1

Create a SharePoint subsite for the contract project. Give the site a meaningful name.

1. Assign the appropriate access rights.
2. Set up the site to prompt for major/minor version numbers when checking in documents.
3. Set up the site to allow 'in place record management.'

2

Install harmon.ie and add the project site.

3

Open email and launch harmon.ie.



What is harmon.ie?

harmon.ie (pronounced 'harmony') is a family of software products that brings enterprise collaboration to **EVERY** business user by transforming the email client into a collaboration and social workspace, called 'social email.'

With harmon.ie, business users can access, edit, and share SharePoint documents directly from Microsoft Outlook® or Lotus Notes®.

STEP
01

Goals

1. Create an initial contract draft and prepare to send it to project members for comments.

Instructions

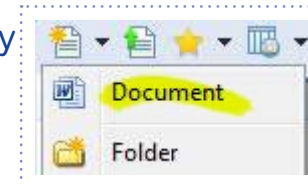
1. Write a Word® document and save it to a local drive.
2. Upload the document to the contract site on SharePoint.
3. Designate the document version “0.1.” – and add the comment **‘initial draft of contract.’** *

★
Use minor version numbers to denote internal edits.



How harmon.ie makes it simple

- New documents can be easily created in SharePoint by selecting “New document” in the harmon.ie sidebar.
- The entire document sharing operation is completed in the email window. There is no need to launch the SharePoint browser, navigate to a specific folder, and edit properties.
- Typical business users resist tedious operations such as writing a document in one application and saving it to another. harmon.ie eliminates these steps.
- Remaining within a single context greatly simplifies the document upload process, eliminating the inconvenience and distraction caused by toggling between multiple windows/applications.



STEP
02

Goals

1. Get feedback from colleagues from other departments, such as Legal, Professional Services, Finance, and Product.

Instructions

1. Send the document as a (SharePoint) link to the colleagues.
2. Make sure colleagues use track changes when working with the documents.
3. Make sure each colleague uses comments when 'checking in' the document, to highlight key changes.*
4. Have the colleagues update you when they are finished.



Version comments help track the document history.



How harmon.ie makes it simple

To send a document link instead of an attachment, do one of the following:

1. Drag and drop the document from the harmon.ie window into the email message.
2. Attach the document to the email message and let harmon.ie automatically upload the document to SharePoint and send a link in its place.

Sending a single document link instead of multiple files means:

- Everyone works on the same document – no multiple revisions to reconcile.
- Only one version of the document ever exists – which eliminates confusion about finding the copy with the latest set of comments.
- A single copy eliminates wasted storage space.

STEP
03

Goals

Accept/reject comments received from colleagues.

Instructions

Open the document and accept or reject each comment.



How harmon.ie makes it simple

The entire operation is completed within a single copy of the document; there is no need to reconcile comments made by multiple colleagues.

STEP
04

Goals

Create a clean copy of the document to send to the buyer.

Instructions

Save the document as a major version (i.e. 1.0).*



Use major version numbers to denote comments received from the buyer.



How harmon.ie makes it simple

Users are prompted for comments and version numbers automatically as part of the document 'save' process.

Goals

Send the document to the buyer.

Instructions

Email the document as an attachment to the buyer.



How harmon.ie makes it simple

Automatically create an attachment from SharePoint by pressing the ALT button while dragging the document into an email message.

Using a single window, with one context, makes the process effortless.



Goals

Review the buyer's comments.

Instructions

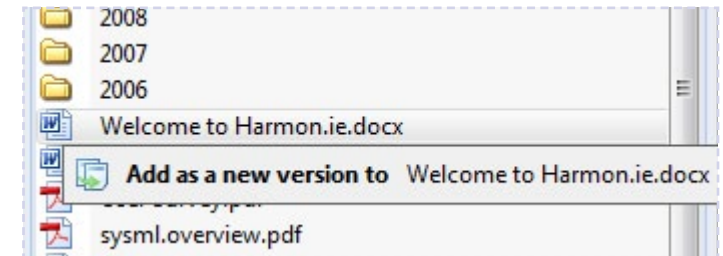
First, you will need to change the document name in SharePoint to match what the buyer calls it.*



Updating the original document name preserves the document history, even when the buyer alters the name.

How harmon.ie makes it simple

1. Drag the email attachment to the harmon.ie window over the document you want to overwrite and hold for 2 seconds. Tooltip is displayed: Add as a new version to <document name>.



2. Drop the document. The new document is renamed and added as a new version to the existing document.



Goals

Review the changes and repeat the contract review process until the contract is ready for signing.

Instructions

Repeat steps 2-6 until there are no more comments.





Goals

Send the document to the corporate 'approver' (e.g. CEO or CFO) for final approval.

Instructions

Email the document link to the approver.





Goals

Declare the final document 'ready for signatures.'

Instructions

The approver should:

- A. Declare the document a 'record'.*
- B. Publish the document as a major version.
- C. Send it back to the principal negotiator so they can collect signatures.



Use records to lock the document and prevent future editing.



Goals

1. Save the email from the corporate approver stating the document is final.
2. Send the document to the buyer for signatures.

Instructions

1. Save the email from the corporate approver that says the contract is final.*
2. Send the final contract document to the buyer for signatures.

★ Saving email messages together with related documents keeps negotiation history in a single place.



How harmon.ie makes it simple

- harmon.ie provides simple 'drag and drop' storage of email messages.
- Automatic mapping of email headers to SharePoint columns ensures that messages can be found using 'Search.'

Contact us

To find out how [harmon.ie](https://www.harmon.ie) can help your organization improve SharePoint adoption, save time and money, and get everyone on the same page, reach us at one of the following contact points:



In the US, call:

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