

Can't Find What You are Looking For?

Overcoming Document Chaos in Microsoft 365



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Chief Product Officer
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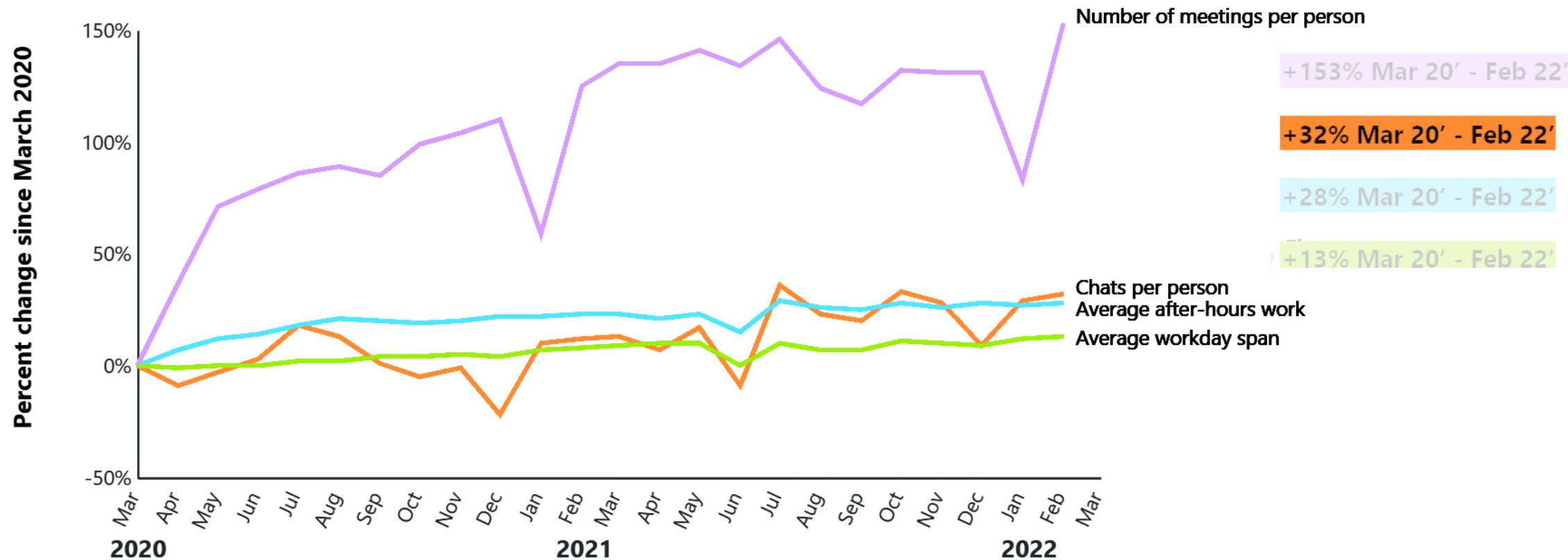
Microsoft Teams

- 270 million monthly active users
- 16% Office 365 Commercial seat growth (y/y) (Q2 2022)
- Used in over 500K organizations as the default messaging platform
- Over 183,000 educational institutions are using Microsoft Teams
- Used in 181 countries, 44 languages
- Marquee Customers: Accenture, Continental AG, EY, Pfizer and SAP are among the companies with more than 100,000 active users



poll

Microsoft Collaboration Stats 2020-2022



Storing Documents in



Where Can You Store Documents in M365?



FORMAL
COMMUNICATIONS



CENTRALIZED
FILES



COLLABORATION



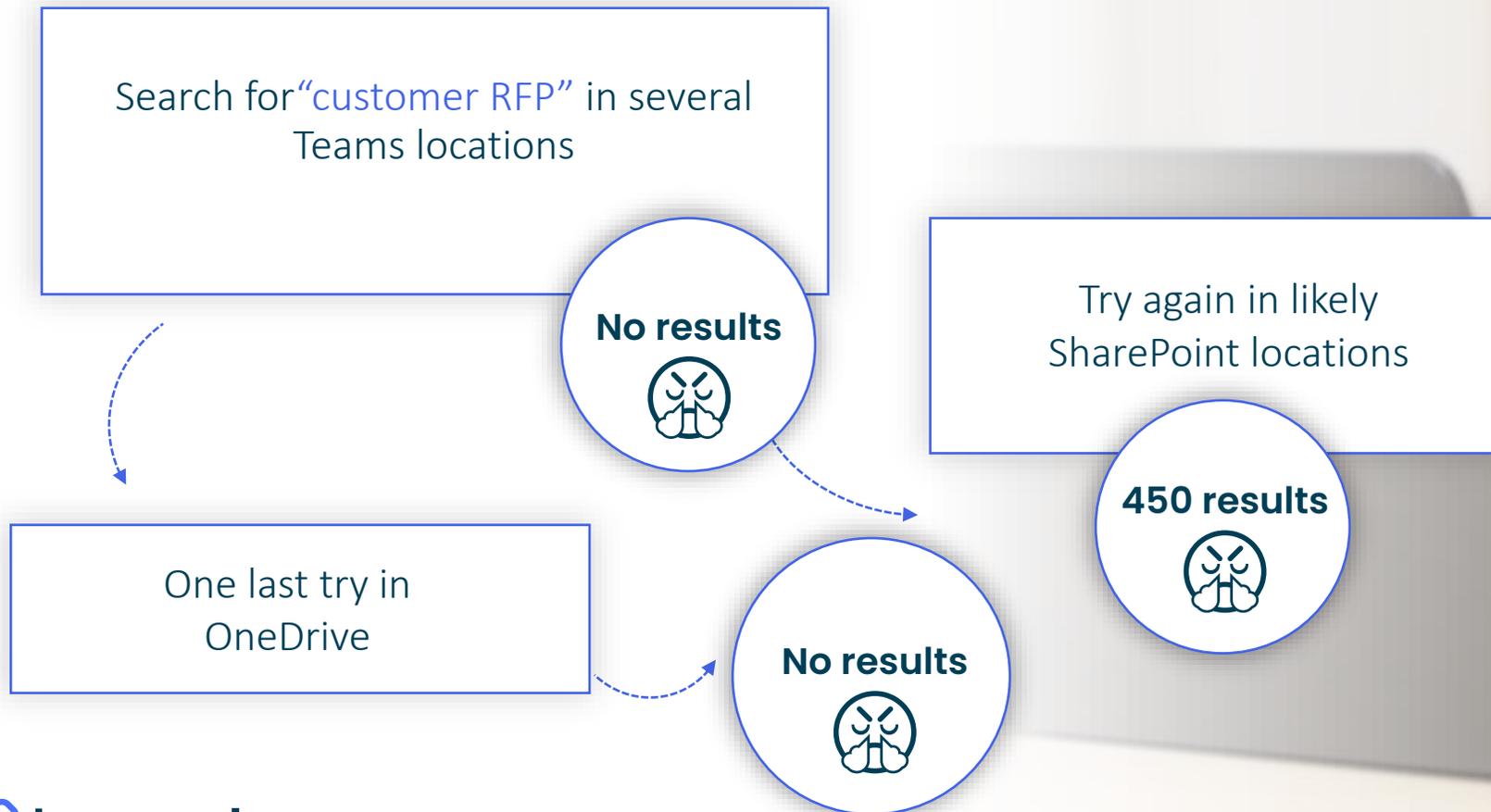
SHARED WITH
ME FILES



PERSONAL CLOUD
STORAGE

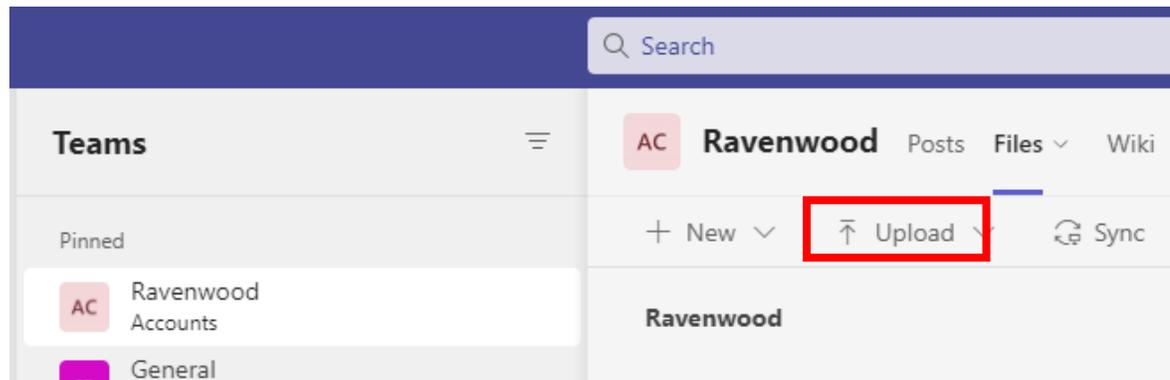


Why Is It Hard to Find Documents in Microsoft 365?

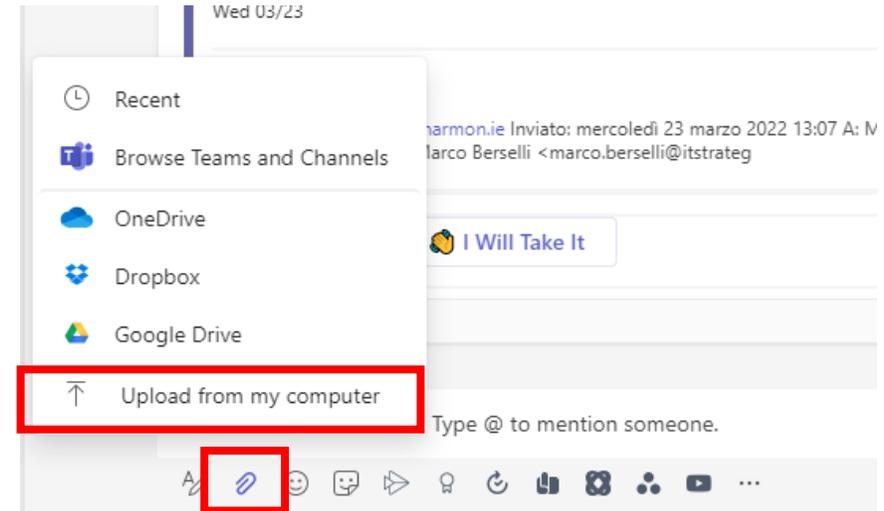


Storing Documents in Microsoft Teams

Storing a Document (File) in Teams



Upload a document to a channel



Add a document to a chat
Add a document to a meeting chat

Where are Teams Files Stored?

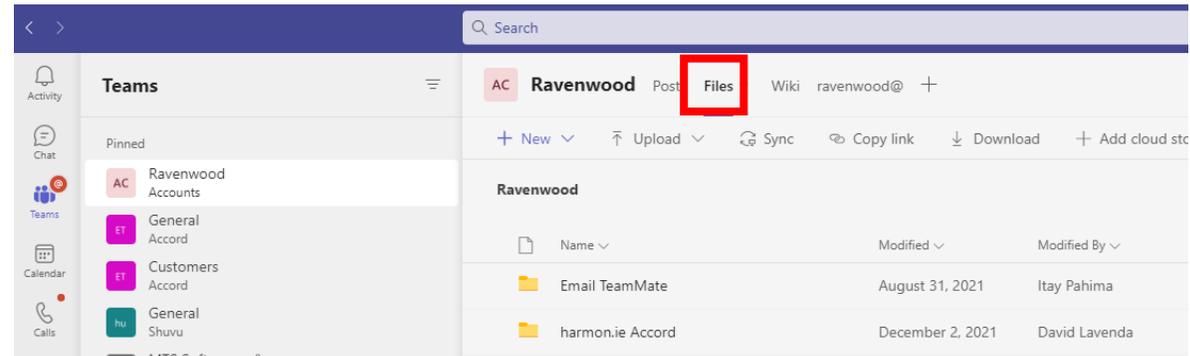
The screenshot shows the Microsoft Teams interface. On the left, the 'Teams' sidebar is visible with a list of teams. The main area shows a channel named 'Ravenwood' with a 'Files' tab selected. The 'Files' tab displays a list of files and folders. The 'Files' tab is highlighted with a red box. The list of files and folders is as follows:

Name	Modified	Modified By
Email TeamMate	August 31, 2021	Itay Pahima
harmon.ie Accord	December 2, 2021	David Lavenda
Document.docx	3 hours ago	Itay Pahima
Presentation.pptx	3 hours ago	Itay Pahima
Your daily briefing_900293598.eml	April 4	SharePoint App

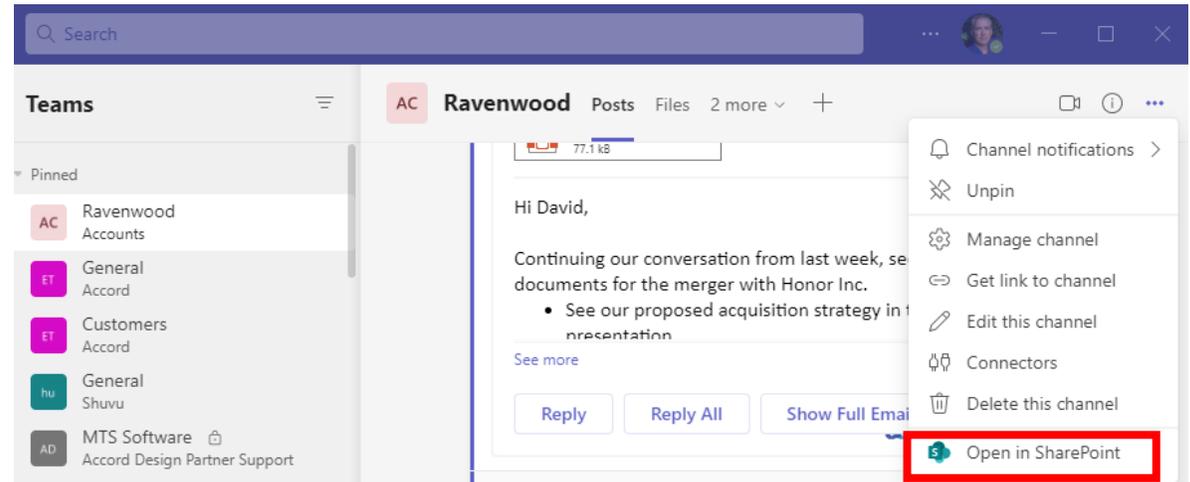
Files are shared in the Teams channel "File" location in SharePoint

How Do You Access Teams Files?

- Navigate to the Teams channel and click on the 'files' tab



- Open the site directly. Click on the ellipsis (...) and select "Open in SharePoint"



- Go directly to the SharePoint URL:
<https://<tenantname>.sharepoint.com/sites/<Teamname>/Shared%20Documents/<channel-name>>

Where Should You Store Files in Microsoft 365?

Best Practices

Microsoft Guidelines for Storing Files in Microsoft 365



If you are working on file by yourself,
save it to OneDrive.



If you're already working as a team —
in Microsoft Teams, SharePoint, or Outlook—you
should save your files where your team works

Strategy #1

Store Files in Where You Work (Teams)

For functional teams (like sales or marketing), share working documents/files where the team collaborates.

Advantage



- Easy to access 'working documents'
- Easy to update and work together on a document

Challenges



- Viewing old versions of the document requires several steps
- Hard to find the file after the collaboration is over
 - Where did I store it?
 - Hard to use metadata to classify content
- Documents are disconnected from related email messages (e.g., from customers)
- Governance is (still) a challenge

Strategy #2

Store Files in the Official Repository (SharePoint)

Advantage



- Easy to know where to store documents
- Easy to classify documents with metadata so they can be found
- Easy to view old document versions (preserve 'work history')
- Governance is straightforward
- Easy to find documents

Challenges



- Adoption is challenging (too many apps)
- Working documents are disconnected from ongoing collaboration work
- Documents are disconnected from related email messages (e.g., from customers)

Strategy #3

Store Documents in Teams/SharePoint – Hybrid Approach

Store working documents in Teams

Store final official 'records' in SharePoint

Advantage



- Easy to access and work together on 'working documents'
- Easy to view old document versions (preserve 'work history')
- Final documents can be stored as 'records' in SharePoint
- Governance is straightforward

Challenges



- Adoption is most challenging (flow is complicated; too many apps)
- Documents are disconnected from related email messages (e.g., from customers)
- Finding the 'right' file is most difficult

The Key to Finding Documents

Make the Right Thing the Easy Thing

Make it Easy to Find Documents in Microsoft 365

Search for “RFP” across all Microsoft 365 location - SharePoint, Teams, and OneDrive

3 results



Customer RFP.pdf



Customers Support

4/20/2022



RFP1.docx



Customer Success

3/21/2022



My_RFP.pptx

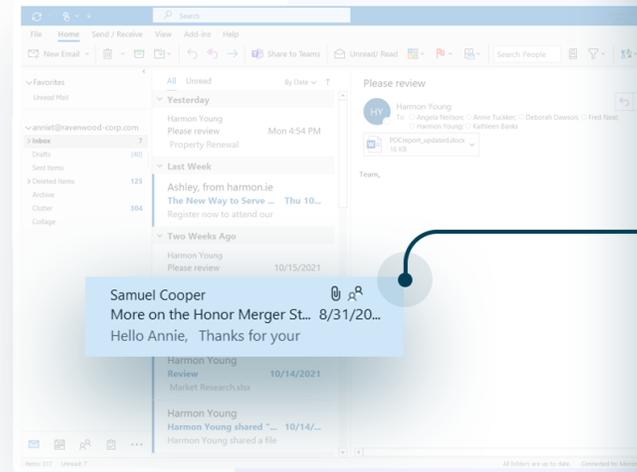


Bradley Jackson

3/21/2022

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Access All Microsoft 365 Apps
from Outlook



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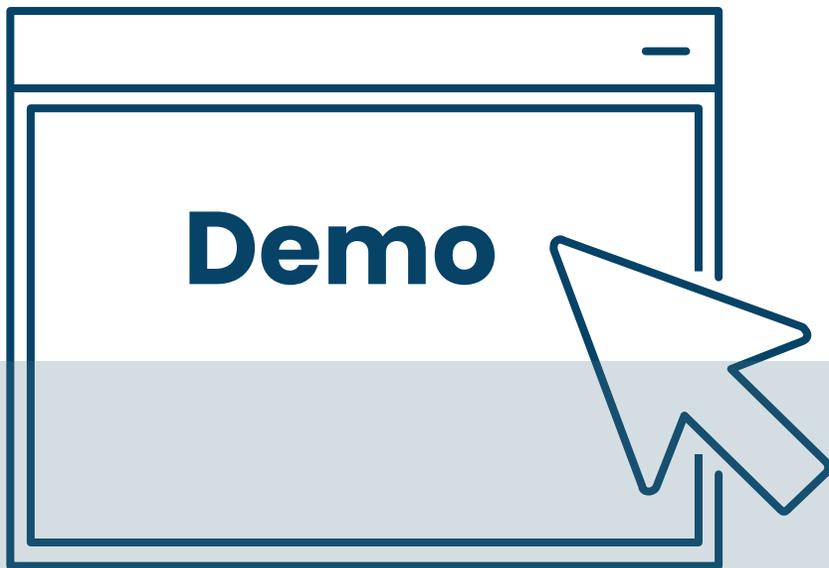
LOCATIONS

▼ All Locations 🔍

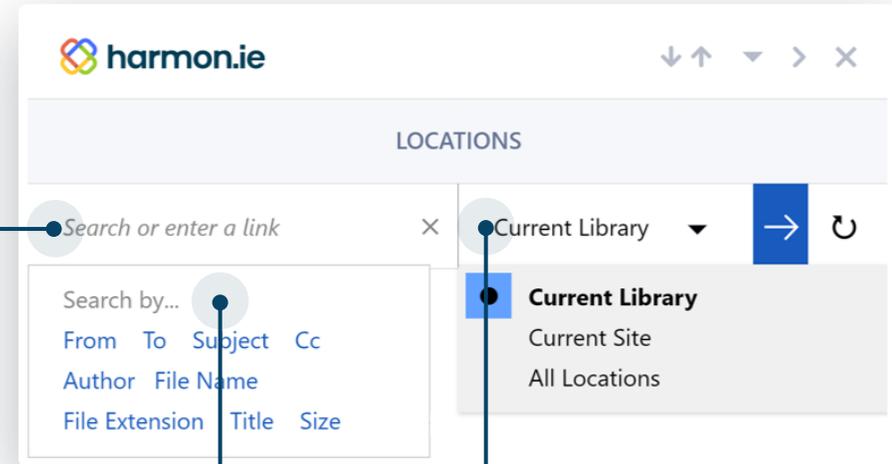
- Favorites
- SharePoint
- Recent
- Teams
- Accounts
 - General
 - ABC Corp
 - Glory Inc
 - 📁 Email TeamMate
 - Honor
 - Qoherent
- RW Construction and Demo
- RW Contracts
- OneDrive
 - Shared With Me
 - 📁 Documents

Uploading document to SharePoint

Uploading "Please review.msg" to "Glory Inc"



Search Across Microsoft 365 Apps



Type text to search or enter SharePoint link to navigate to location or document

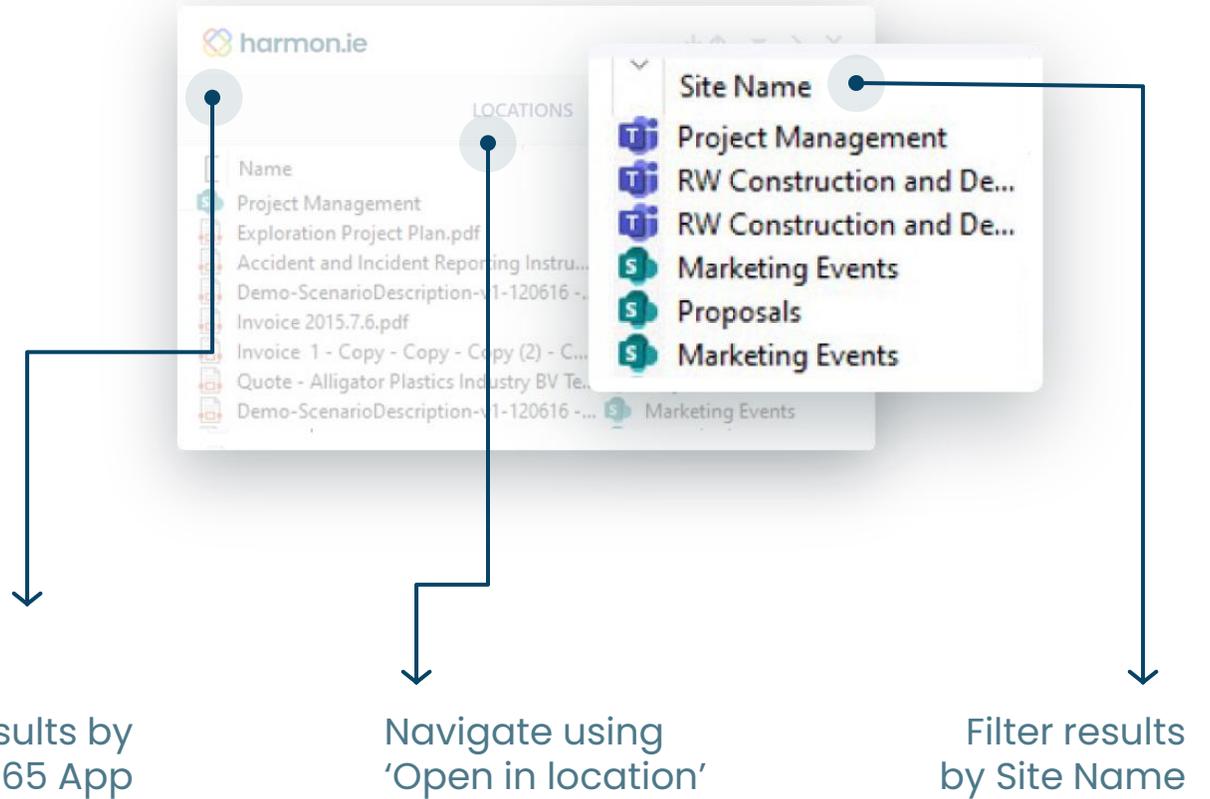
Search by column or metadata

Search scope

Search Across Microsoft 365 Apps



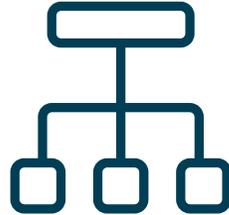
- Filter/Sort by Microsoft 365 App
- Filter/Sort by Site
- Navigate directly to location



The 3 Keys to Finding Documents in Microsoft 365



CAPTURE



CLASSIFY



DISCOVER

Capture

Capture Important Emails and Documents Quickly

Dragging & dropping emails & documents to SharePoint boosts information governance

The screenshot shows an email client interface on the left and a SharePoint document library on the right. The email client displays an email from Samuel Cooper with attachments 'Company profile.pdf' and 'Capitalization table.xlsx'. The SharePoint document library shows a list of documents organized by project name. Two documents are highlighted with red boxes: '2018 Contract.docx' and 'Contract_2015-08-19_09-06'. Arrows indicate the process of dragging the email and its attachments to the SharePoint document library.

Name	Modified	Modified By	Project Name	Re
Project Name : Alpha (9)				
Commercial Report.docx	5/2/2018...	Annie Tuck	Alpha	AF
Draft proposal_2015-08-19_09-06-1	7/16/201...	Fred Neal	Alpha	EN
EULAs_2010-08-08_07-52-25_Ange	7/16/201...	Fred Neal	Alpha	EN
Integration Project - Requirement	5/30/201...	Fred Neal	Alpha	EN
2018 Contract.docx	5/30/201...	Fred Neal	Alpha	
On the Road_2010-08-08_07-44-45	7/16/201...	Fred Neal	Alpha	EN
Procurement Process.docx	7/10/201...	Fred Neal	Alpha	EN
Standard Affiliate Partner Agree	5/30/201...	Fred Neal	Alpha	EN
Technical Documentation.docx	6/15/201...	Annie Tuck	Alpha	EN
Project Name : BearingPoint (2)				
Contract_2015-08-19_09-06	7/16/201...	Fred Neal	Alpha	
collage_zendes_k_auth.PNG	5/2/2018...	Annie Tuck	Citi	US
Customer Support Datasheet 2006	5/3/2018...	Annie Tuck	Citi	US
Dexus.docx	5/2/2018...	Annie Tuck	Citi	US
Project Name : CononoPhillps (3)				
55694_001.pdf	5/2/2018...	Annie Tuck	CononoPhillps	US
Accide nt xyz.docx	5/2/2018...	Annie Tuck	CononoPhillps	US
Agency contract Beta2.docx	5/2/2018...	Annie Tuck	CononoPhillps	US
Project Name : Continental (2)				
Contact List.xlsx	5/16/201...	Fred Neal	Continental	US
Continue pilot notes.JPG	5/3/2018...	Annie Tuck	Continental	EN
Project Name : EY (6)				
Agency contract.pdf	5/8/2018...	Annie Tuck	EY	EN
andy1.JPG	5/2/2018...	Annie Tuck	EY	EN
andy2.JPG	5/2/2018...	Annie Tuck	EY	EN
Community Initiative_2010-08-08	7/16/201...	Fred Neal	EY	EN
Customized Environment_2010-08	7/16/201...	Fred Neal	EY	EN
printable-brochure.pdf	6/20/201...	Fred Neal	EY	EN
Project Name : SwissRe (10)				

Classify

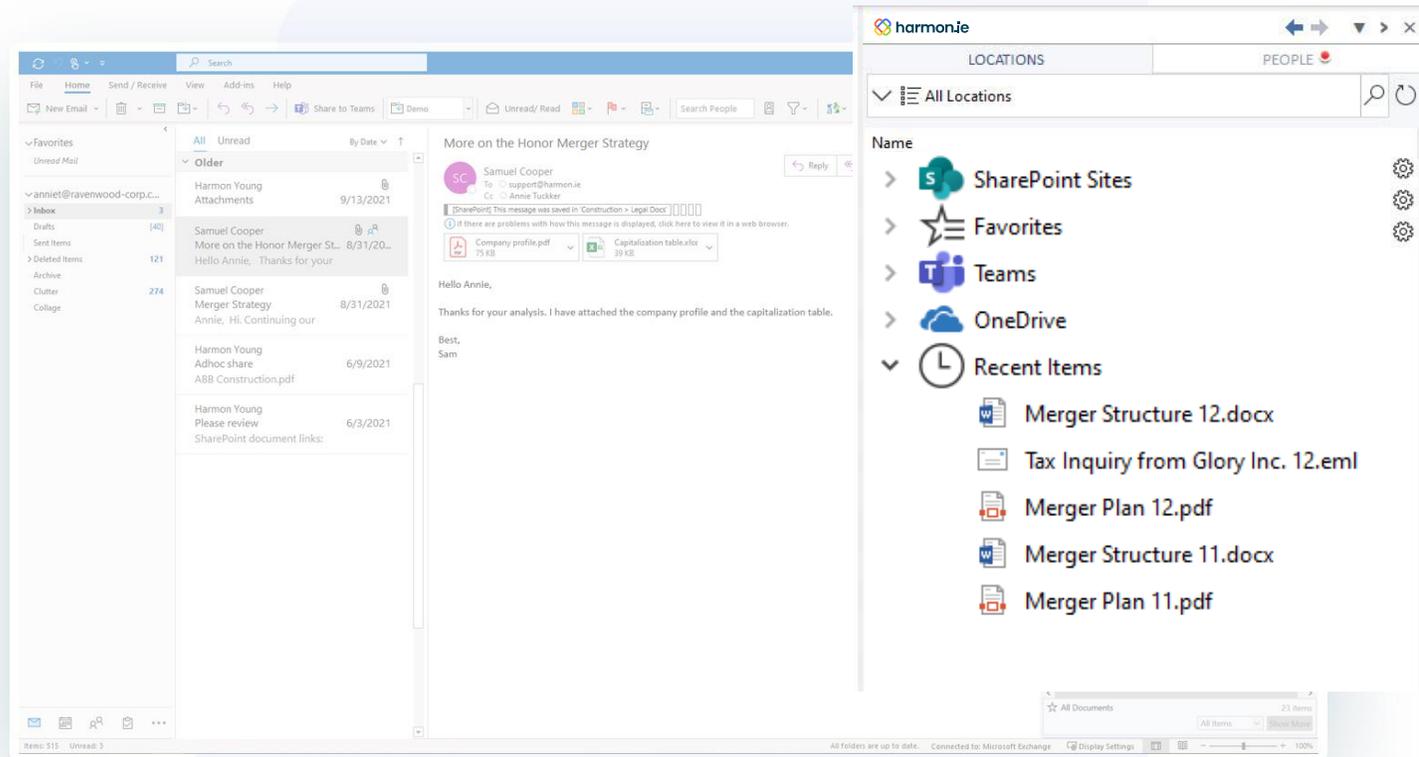
Emails and Documents
to SharePoint/Office 365,
using metadata

The screenshot shows an Outlook interface with an email open. The email is from Samuel Cooper to Annie Tuckker, dated 8/31/2018. It contains two attachments: 'Company profile.pdf' (75 KB) and 'Capitalization table.xlsx' (39 KB). The email body includes a SharePoint link and a message: 'Hello Annie, Thanks for your analysis. I have attached the company profile and the capitalization table. Best, Sam'. A 'harmonie' dialog box is overlaid on the right side of the screen, titled 'EDIT UPLOADED DOCUMENT(S)'. The dialog box has a 'Contract' header and a prompt: 'Please fill the properties of the uploaded document(s)'. It contains several fields: 'Content Type' (set to 'E-mail'), 'Name' (set to 'Contract'), and 'Title' (set to 'Contract'). Below these fields is a 'Projects' section with a dropdown menu currently showing 'Visitor Experience;'. At the bottom of the dialog box, there are 'Created' and 'Modified' dates and times, both set to 8/29/2018 7:25 AM, with 'Annie Tuckker' listed as the user. 'Cancel' and 'Save' buttons are at the bottom.

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Recent Items

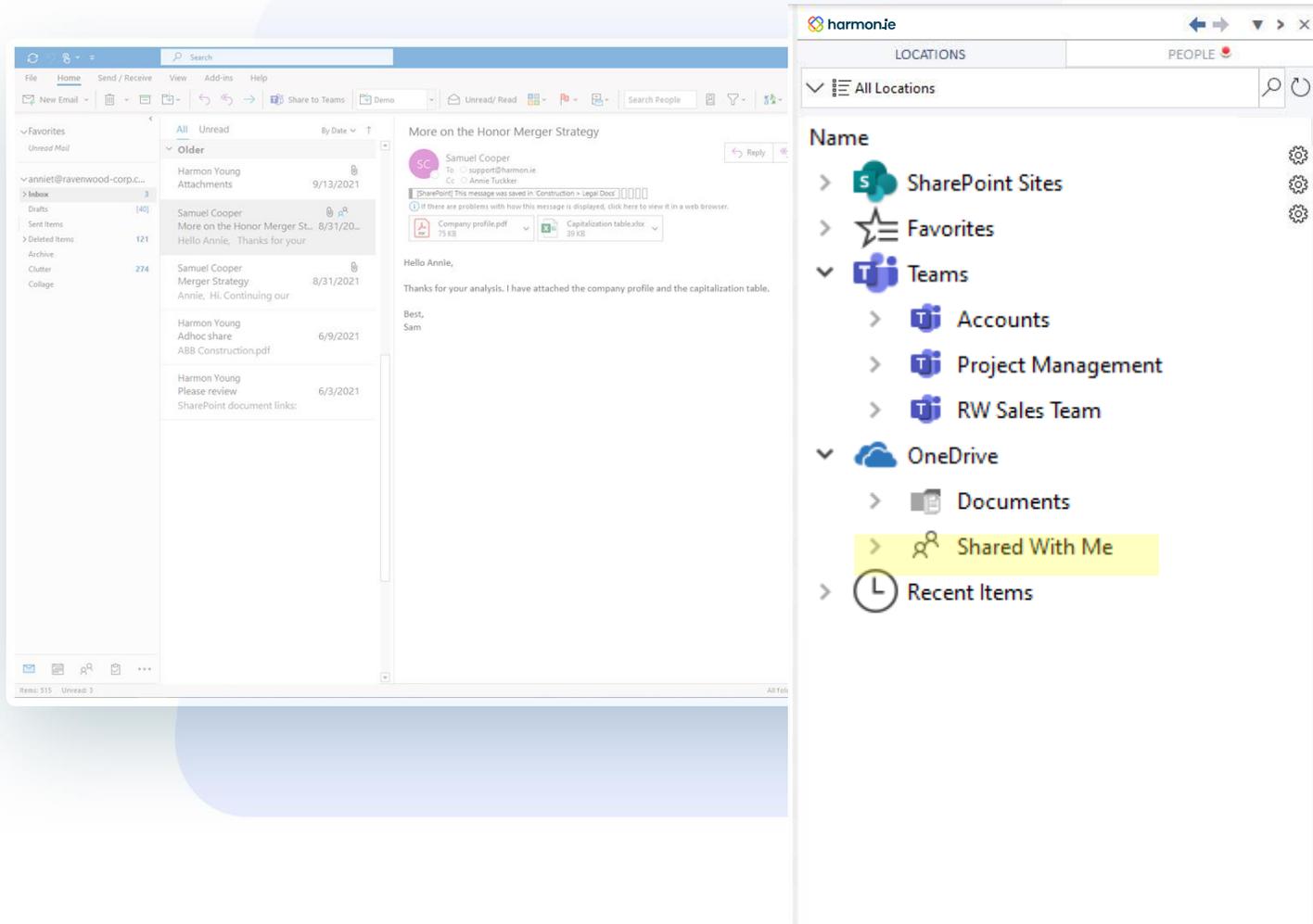
My most recent items
from across Microsoft 365
apps



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'Shared With Me' Items

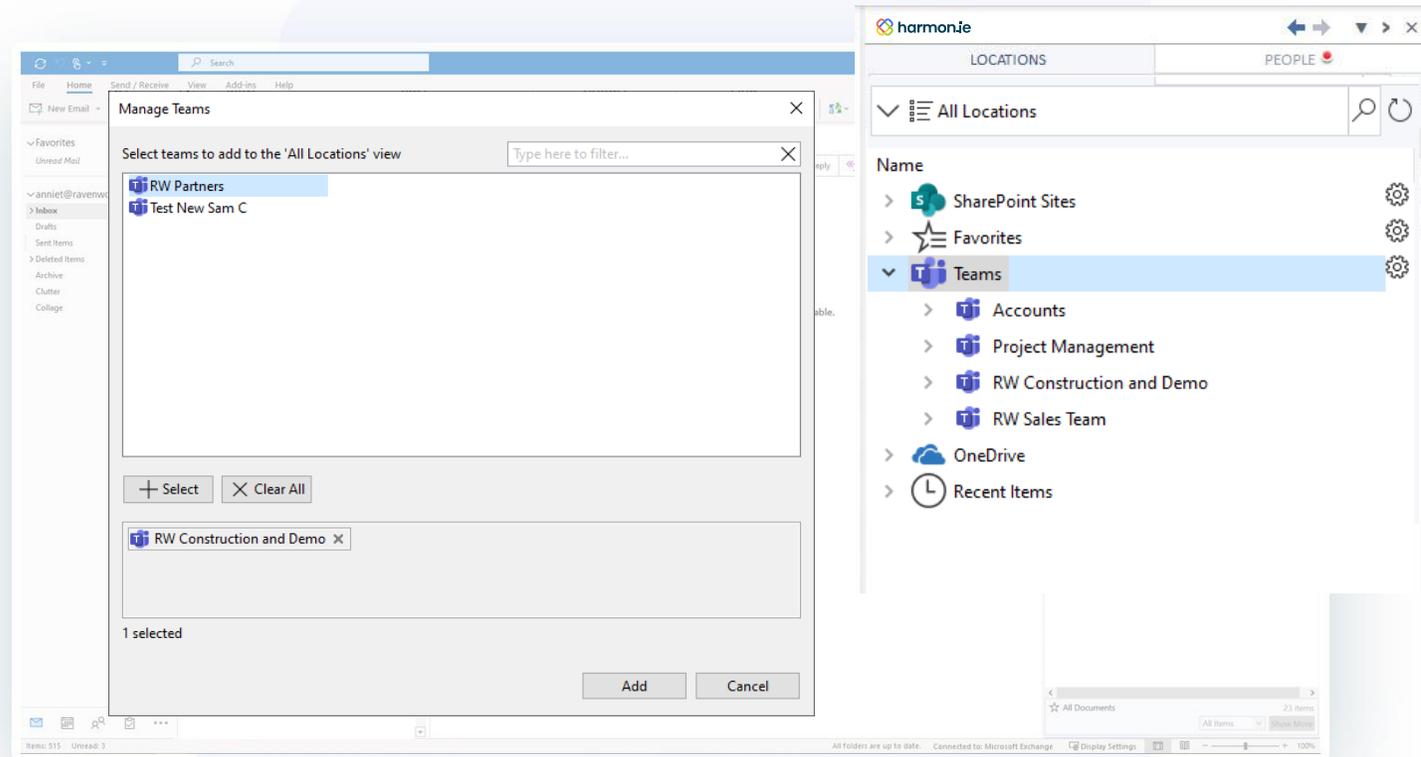
Items shared with me
from across Microsoft 365
apps



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Discover & Favorite Teams

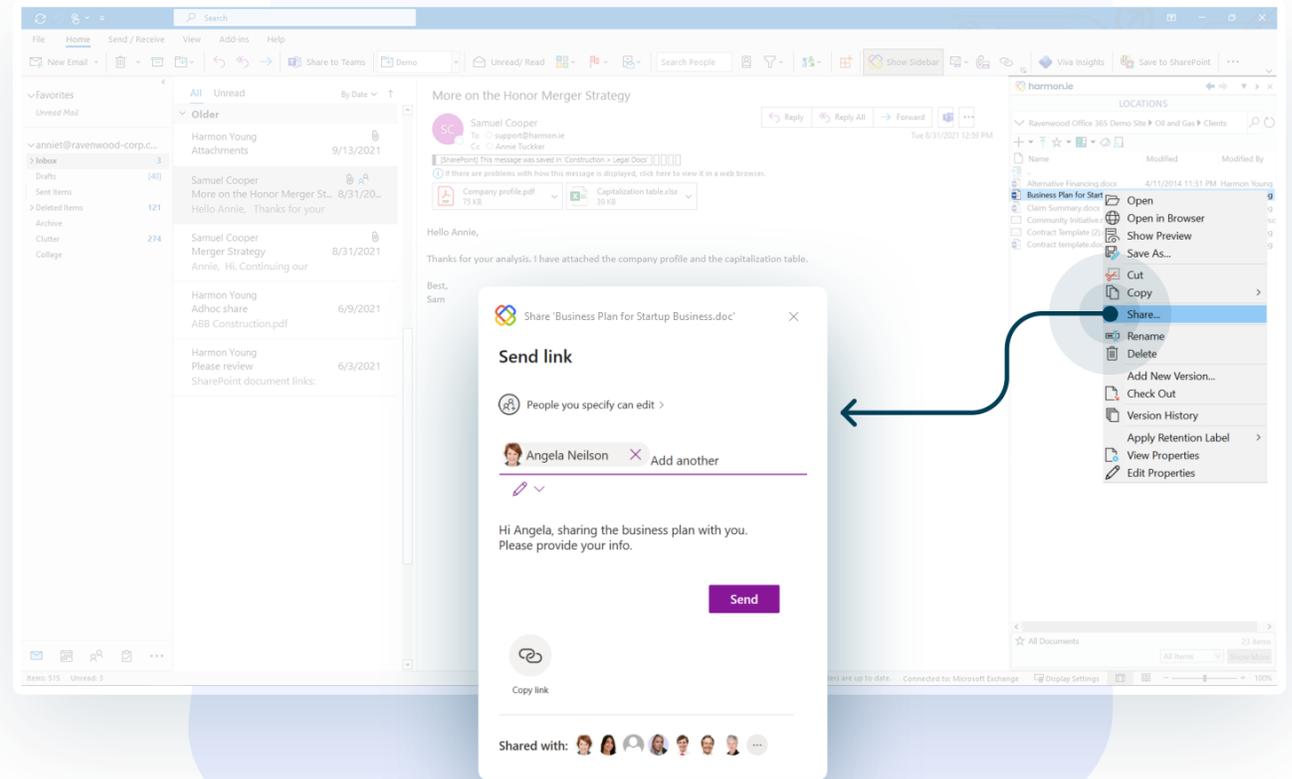
Access your most important Teams from Outlook



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Modern Share Experience

Granular share capabilities right from Outlook



Microsoft Trusted Partner

 Microsoft
Co-Sell Ready
Partner

Gold
Microsoft Partner
 Microsoft

 Get it from
Microsoft
AppSource

 Microsoft
Content Services
Partner Program
Charter Member



Why You Need to Upgrade to 9.3.2

- Microsoft dropped Internet Explorer (IE), including services provided to apps (9.3.2)
- Save S/MIME encrypted emails to SP unencrypted (9.3)
- Property editing enhancements (9.3)
- Accessibility (9.2)
 - WCAG 2.1 Keyboard Support
 - JAWS Narration Support
- Private channel support (9.1)
- External Share of folders & document sets (9.1)

Check out [“What’s New in harmon.ie”](#)



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Thank you!