

A grayscale photograph of a man and a woman in an office setting. The man, wearing glasses and a sweater, is leaning over a desk and pointing at a computer monitor. The woman, also wearing glasses and a blazer, is sitting at the desk with her hands clasped, looking at the monitor with a smile. A red diagonal overlay covers the top half of the image, and the title text is centered within this red area.

**HOW SHAREPOINT CAN BE THE  
IDEAL SOLUTION FOR INTELLIGENT  
EMAIL MANAGEMENT**

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## PRECURSOR: PREVIOUSLY IN THE SERIES

This eBook is the final installment in harmon.ie's email management series. We suggest you read the previous eBooks in the series, which explain in detail the challenges of email management and your available options for overcoming them. This eBook provides the final piece of the puzzle; explaining how improving the user experience in SharePoint facilitates intelligent email management, making it easier and more effective.



# YOUR GUIDE TO EMAIL MANAGEMENT SUCCESS IN SHAREPOINT

Time will tell whether our ever-increasing appetite for data will have a negative effect on our personal wellbeing and interpersonal relationships in the future. In the enterprise, however, problems regarding 'data overload' and their respective solutions are plain to see. Workers must avoid being dragged under the waves of business information and keep their head above water, constantly fighting to ensure documents are stored and classified correctly so they can be accessed when needed.

At work, 'documents' are often in fact emails. 80% of important records in an organization are emails. **On the other hand, just 5% of business emails are documents of record.** How can you identify those critical emails? Without the proper level of attention, sensitive information held within email is at much greater risk of being mishandled.

*So what should you do?*

# YOUR ORGANIZATION HAS THREE BROAD OPTIONS FOR EMAIL MANAGEMENT. THEY ARE:

Using a dedicated email management solution

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Using a combination of various Microsoft email and document management applications

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Using SharePoint as the central repository for both email and document records





The second eBook in this series—*Three options for solving the email management problem*—discussed these options in detail. After weighing the possibilities for email management, the eBook demonstrates decisively that SharePoint is the best method for email management, since it provides a centralized repository where emails can be stored together with other documents of record.

However, it is not enough to simply have the infrastructure in place. Email management success with SharePoint can only happen when every individual in the business uses the platform in the right way. In this eBook, the final part in the series, we explain why the user experience is critical in implementing email management with SharePoint.

# THE IMPORTANCE OF THE USER EXPERIENCE

'User experience' (UX) is commonly known as how websites and applications function for the consumer. A good UX does not simply mean having an appealing visual design, smooth animations or the right site navigation. UX encompasses every aspect of an end-user's interaction with a product, whether customer-facing or employee-facing.

For enterprise solutions, the user experience dramatically affects whether an employee will complete a task in the 'right way'. If a task is too difficult to perform, employees will find ways to work around it or avoid it completely. A poor UX can be the reason for widescale problems like shadow IT, but it can also happen on a smaller scale, in seemingly simple processes like storing documents.

A hand is shown holding a white sticky note with the text "RESPONSIVE WEB DESIGN" written on it in black marker. The hand is positioned in the lower right quadrant of the image. In the background, several other sticky notes are visible, some with text like "SALES CUSTOMER RETENTION", "PEOPLE RESOURCE", "PLAN", "DEVELOP MARKETING", "PERFORMANCE", and "DETERMINED GOALS AND". The sticky notes are scattered across the page, with some overlapping. The overall scene suggests a brainstorming or planning session.

UX is most important during the 'last mile' of technology adoption. No matter how much technology does the legwork for you - if you cannot complete the last mile, you cannot get past the finish line. SharePoint is a prime example of this: no matter the capabilities of the infrastructure you put in place, if employees aren't able to use the platform 'as directed' - because the operations are too difficult, confusing, or unintuitive - then the business initiative fails, and your investment will be lost.

Out-of-the-box SharePoint has some flaws in the user experience that reduce user adoption. Fortunately, fixing these problems does not require a complete overhaul of the platform - merely some tweaks to how users manage emails in SharePoint.

## HOW UX IMPROVES THE 'LAST MILE' OF EMAIL MANAGEMENT

Email management requires knowledge workers to treat emails like other documents of records—storing them in the right location and applying metadata so they're easy to find when needed. Knowledge workers must sort through their many priorities during their day. They are focused on their main work responsibilities; they don't pay much attention to the location of where emails are stored or the metadata with which they are tagged. This causes email management to feel like a burden and lead workers to avoid the tasks necessary to capture and classify important emails.

This is why UX is crucial to email management in SharePoint – making the capturing and classifying of emails easier will make workers more likely to perform these tasks.

SharePoint offers a framework for managing emails and documents that is structured by Sites, Libraries, Folders, and Document Sets. Built-in permissions and uniform metadata practices further help the managing of information; however, the process of applying metadata is manual and menial.

Users must add metadata labels for each individual email and unless mandatory fields are set by the administrator, they must make the conscious effort to add labels themselves. This is a time-intensive task that is too convoluted for the average knowledge worker.

Applying metadata labels to content is just a small part of the email management process, yet ignoring it can cause the process to quickly unravel. While businesses are doing the right thing by treating emails as documents of record, if those emails cannot be found when necessary, the email management process is not complete. Yet in the current SharePoint setup, knowledge workers cannot be expected to consistently add metadata to emails as it is simply too time-consuming.

Thankfully, improving the UX behind SharePoint metadata is a simple fix.



# INTRODUCING INTELLIGENT EMAIL MANAGEMENT

Smoothing out the UX behind email management in SharePoint is crucial to a high-quality experience and a more productive workforce. [harmon.ie](#) is the solution that provides automated, intelligent metadata capabilities and integration with a user's Outlook window to make the capturing, classifying, and managing of emails in SharePoint easier and more effective.

**[harmon.ie](#) offers solutions for every place where people work: Outlook on the desktop, the Outlook Web App, Microsoft productivity apps - Word, Excel, and PowerPoint, as well as a mobile app for iOS and Android.**

*harmon.ie enables intelligent email management through five primary features:*



- **Auto-capture:**  
drag email messages and attachments from Outlook and drop them directly into SharePoint.
- **Auto-classification:**  
automatically map information as SharePoint metadata, like the 'To' and 'From' fields, as well as topics within the body of an email, or prompt users to add metadata tags whenever they upload files.
- **Faster discovery:**  
filter by metadata tags, views, columns, or use dedicated search to quickly find information in your SharePoint environment. Do so from within the harmon.ie sidebar in Outlook to save time and hassle when processing audits or fulfilling compliance needs.
- **Selective automation:**  
harmon.ie artificial intelligence (AI) uses topics to identify potential emails that need to be captured, reducing the steps for users to capture and classify important information.
- **Smart suggestions:**  
beyond simply bringing important information to the user's attention, harmon.ie will also offer suggestions on where to store it based on storage history.

The screenshot displays an Outlook interface with a ribbon at the top containing various actions like 'To Manager', 'Done', 'Create New', 'Move', 'Rules', 'Assign Policy', 'Unread/Read', 'Tags', 'Follow Up', 'New Group', 'Browse Groups', 'Search People', 'Address Book', 'Filter Email', 'Read Aloud', 'Show Sidebar', and 'Save to SharePoint'. The main pane shows an email from Angela Neilson to Fred Neal, dated Wednesday, 09/01/2019 at 13:25. The subject is 'Re: Marketing Budget template'. A notification bar indicates the message was saved in 'Bird Protection Team Site > Documents'. Below the email text, there is an 'Action Items' section. The right-hand sidebar, titled 'harmon.ie', shows a navigation tree with 'LOCATIONS' and 'PEOPLE'. Under 'LOCATIONS', it shows 'All Sites > Birds Protection Team Site > Documents'. A list of files is displayed with columns for 'Name' and 'Modified'. The files include various documents and spreadsheets such as 'Wash Reserve Board Emails', 'A World Richer in Nature.xlsx', 'Albatross.docx', 'Archaeological Study.docx', 'Audience Profiling.xlsx', 'Avocets and stilts overview.docx', 'Banner Ad - Visitor Experience.png', 'Birds without Borders Infographic.pdf', 'Conjura Attribution Modeling Primer\_v3.pptx', 'Contract Template.docx', 'Data analysis.xlsx', 'Data Management Plan.docx', 'Data Supply Contract.pdf', 'Digital Posters - Saving Nature Campaign.pdf', 'Digital Workplace Communications Materials.docx', 'Digital Workplace Communications Plan.docx.xlsx', 'Digital Workplace Contact List.docx.xlsx', 'Digital Workplace Release Notes 1.2.docx', and 'Digital Workplace Roadmap.pptx'.

## See how the harmon.ie Office sidebar works in more detail:

The harmon.ie sidebar is a bridge between a user's SharePoint environment and their Outlook inbox – the two places they spend most of the work day. From the sidebar, users can quickly access their SharePoint libraries and store both emails and documents together, treating the important information within them the same.

For example, a user may have received an email that discusses the marketing budget for the coming year. To capture this information, the user simply drags the email from their inbox into the harmon.ie sidebar. The email is automatically stored as an MSG file (the default mail message format used in Outlook and Exchange) and given a unique name.

## TOPICS



harmon.ie

LOCATIONS

PEOPLE

TOPICS



## VISITOR EXPERIENCE

ALL



## In your mailbox

Re Marketing Budget templet |

## Last Month

Birds without Borders Infographic |

Re Budget for the Digital Workplace Program |

Re Budget for the Digital Workplace Program |

Marketing budget for GBOP |

harmon.ie also automatically maps the key information from the email itself – subject, sender, recipient, date, etc. – as metadata labels. You can also add custom metadata properties like customer/client information, etc. to supply emails and documents with additional information. With basic metadata properties taken care of and the option to add more specific labels, emails and document classification is made easier for the end user.

harmon.ie does more than just bring the steps in the email management process together. Through AI-driven topics, harmon.ie will suggest information related to the email you are viewing. It will help you identify emails that need to be stored in SharePoint, based on the information they contain, and even suggest where to store them based on where you have stored similar emails.

## CHOOSE HARMON.IE FOR INTELLIGENT EMAIL MANAGEMENT

These eBooks have discussed the importance of email management and the reality of the situation for many businesses. Platforms like SharePoint provide a suitable, if not fully-formed, approach to the process, leaving users to fall at the final hurdle and cause platform adoption to suffer as a result.

The harmon.ie sidebar combines Outlook and SharePoint within a single application window, streamlining the email management process to make the experience much easier for workers to follow. More sophisticated features of harmon.ie can take the user experience further, proactively pushing information of importance to the user and providing suggestions for what to do with it.



To learn more about how harmon.ie can provide the final boost to your email management initiative by improving the user experience within SharePoint and Office 365, talk to us today.

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[www.harmon.ie](http://www.harmon.ie)

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*Find out more about why the best tech solutions for your employees should be the easiest ones to use. Visit our website to [view additional resources on email management](#) or [to speak with a harmon.ie email management expert](#).*

