

You Can't Always Find What You Want

Why Just Storing Emails and Documents in SharePoint is No Longer Enough

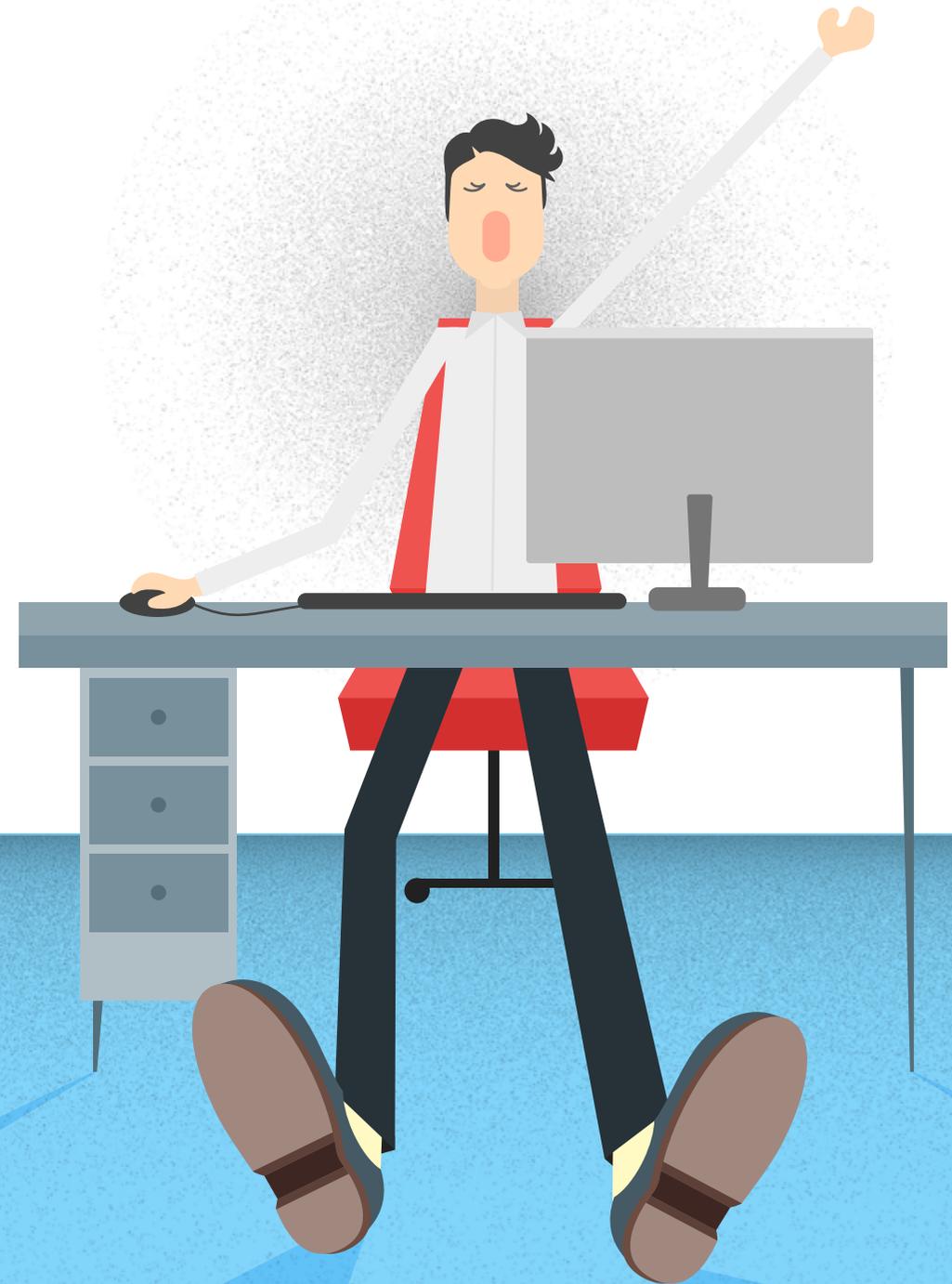


When working with SharePoint, who doesn't lean towards the 'principle of least effort?'

With SharePoint, users often have to complete unnecessarily complicated, multi-step tasks, such as storing documents in the right place and tagging them with the correct metadata. As a consequence, processes and procedures are almost always ignored.

However, due to increasingly strict information compliance rules that carry fines (and worse), corporate management is insisting you comply with information governance policies by classifying documents and emails accurately in SharePoint.

This eBook provides guidance on how to get on board with record keeping in SharePoint without having to change your work habits.

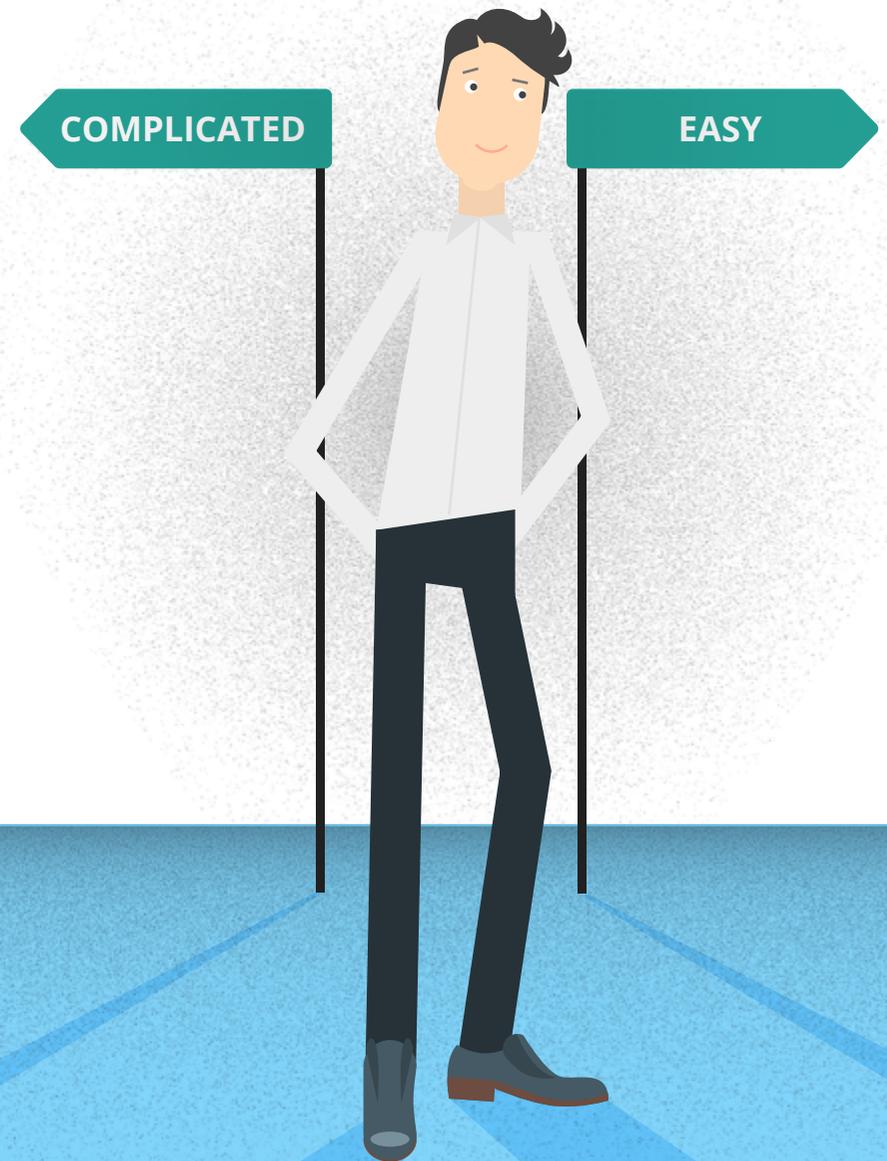


A gap in modern workplace IT

The principle of least effort can be defined as follows:

“ *The proposition that, in striving for a goal, an organism generally seeks a method involving the minimum expenditure of energy.*”

From information seeking to workplace tasks, this very basic principle underlies a wide range of behaviors. In the context of users in a SharePoint environment, this principle also stands. Users, as a rule, will naturally tend towards the easiest possible behavior. Therefore, if you can find a way of storing documents and emails which work for you, yet is less challenging than using SharePoint, it only makes sense to do this.



As you know, the standard method of storing documents in SharePoint is not particularly straightforward.

It requires opening new windows, manually adding metadata and applying company-defined rules. So, when you can simply store documents and emails in your own C: Drive, the principal of least effort means you will naturally do this.



There is a real conflict between how users want to interact with documents and what regulation requires you to do.

Besides the principles of good document management, IT leaders are aware that a range of regulatory requirements insist that organizations store their data in an environment that is shared, auditable and accessible to all. Companies are being pressed into getting their information governance into order, and so, it is becoming more important than ever to become more conscientious with your documents...and your emails of record. If you do not store information correctly, the business faces a range of risks, including:



Data leakage, which can lead to difficult situations for your business and potentially even dismissal of employees.



Document chaos through duplication and proliferation of many versions.



Lengthy email threads that clog inboxes and frustrate users, who in turn complain.



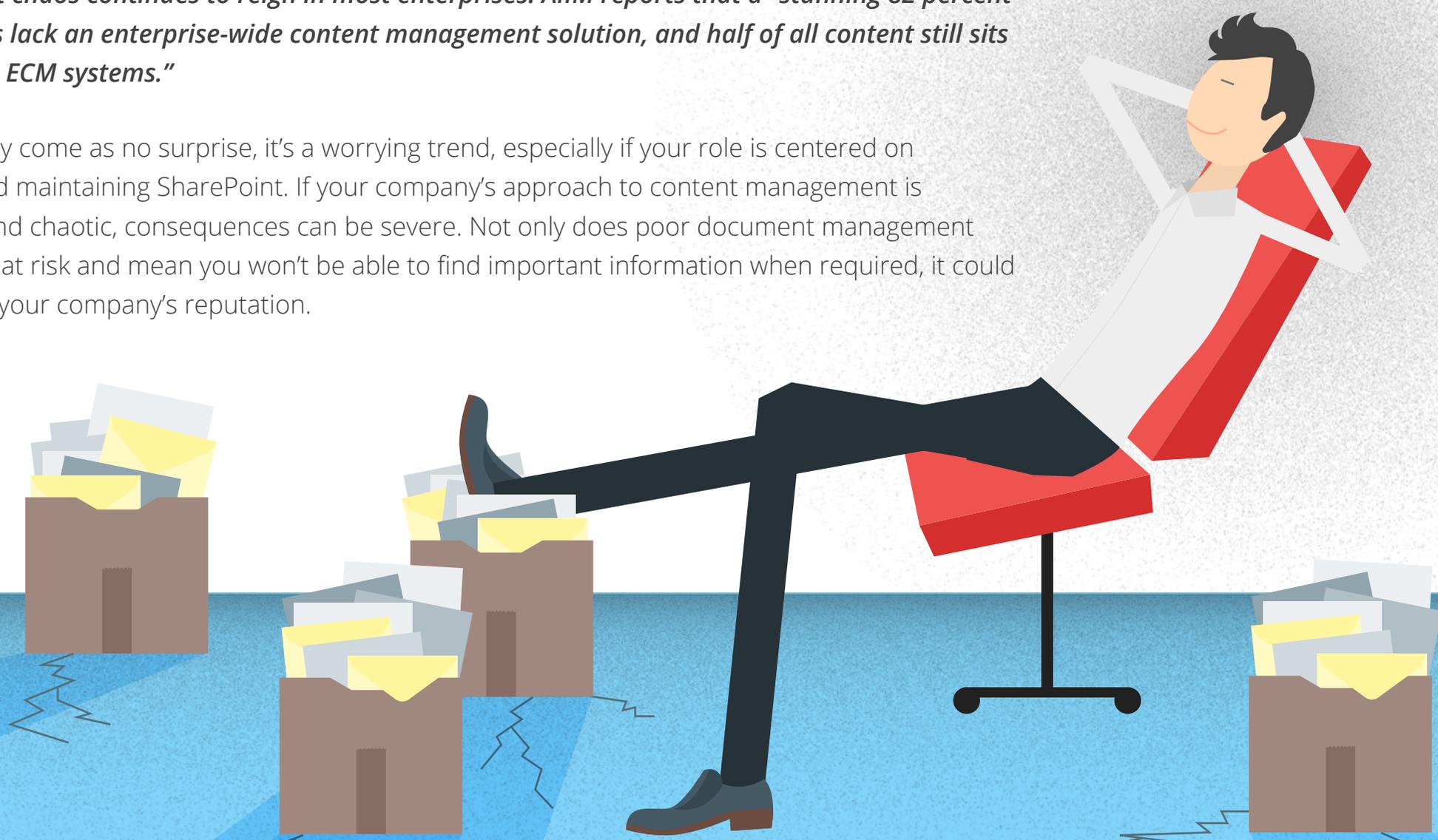
Non-compliance with company rules and **failure to implement best practices**.

The risks of being passive

Research by AIIM - the 'global community for information professionals' – confirms what most SharePoint users already know:

“ *Content chaos continues to reign in most enterprises. AIIM reports that a “stunning 82 percent of firms lack an enterprise-wide content management solution, and half of all content still sits outside ECM systems.”* ”

While this may come as no surprise, it's a worrying trend, especially if your role is centered on managing and maintaining SharePoint. If your company's approach to content management is disordered and chaotic, consequences can be severe. Not only does poor document management put your role at risk and mean you won't be able to find important information when required, it could also damage your company's reputation.

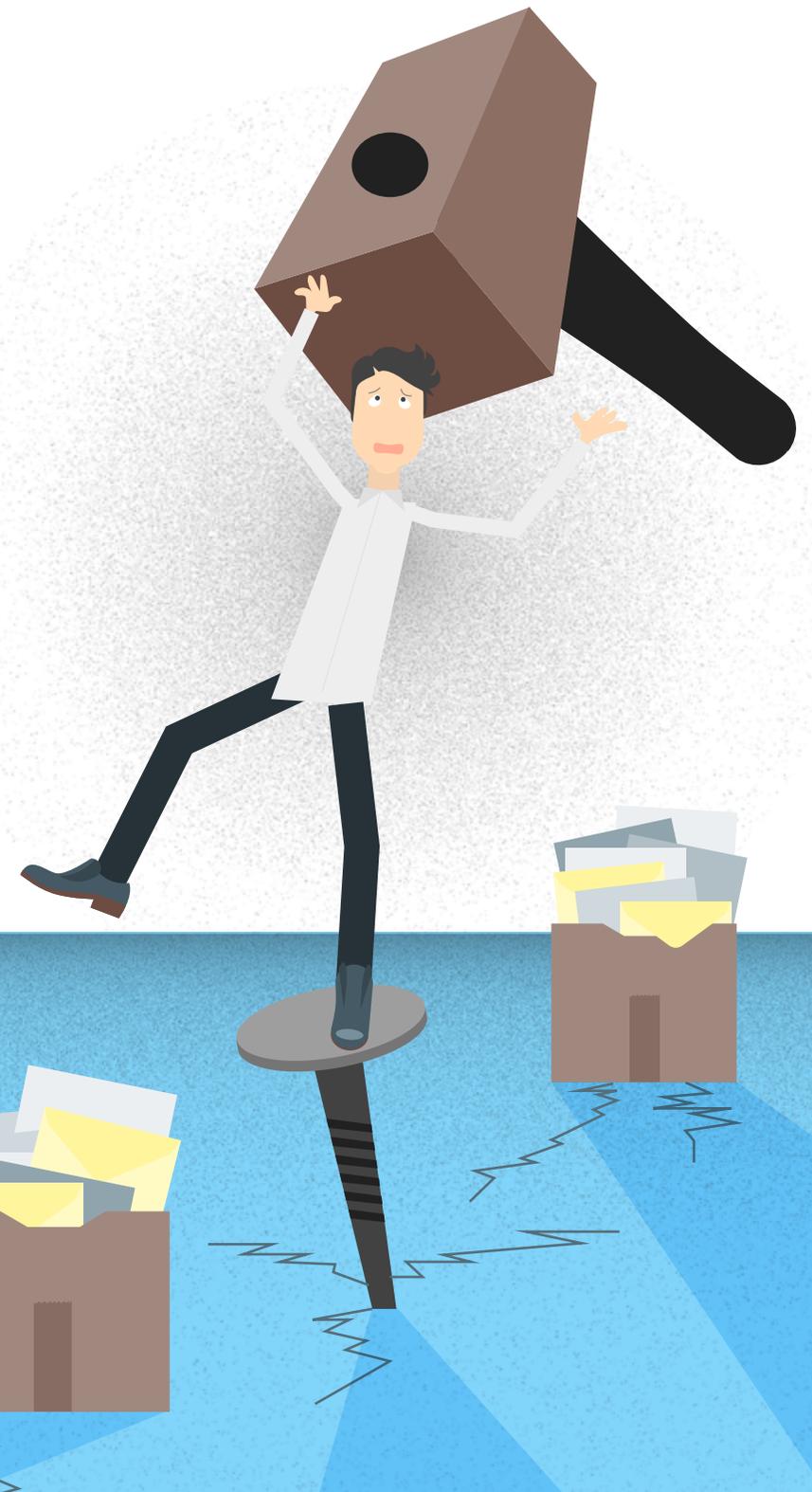


If your role involves storing information in SharePoint to any degree, you are likely to hear common complaints from colleagues about how the platform is hard to use, how documents are lost or inaccessible and how confusing it can be to retrieve emails.

All too often, IT personnel are unable to change this mess alone. Besides recommending colleagues follow document management best practices (which are constantly ignored) there is little you can really do to enforce change. This then leads to colleagues unfairly seeing you as ineffective.

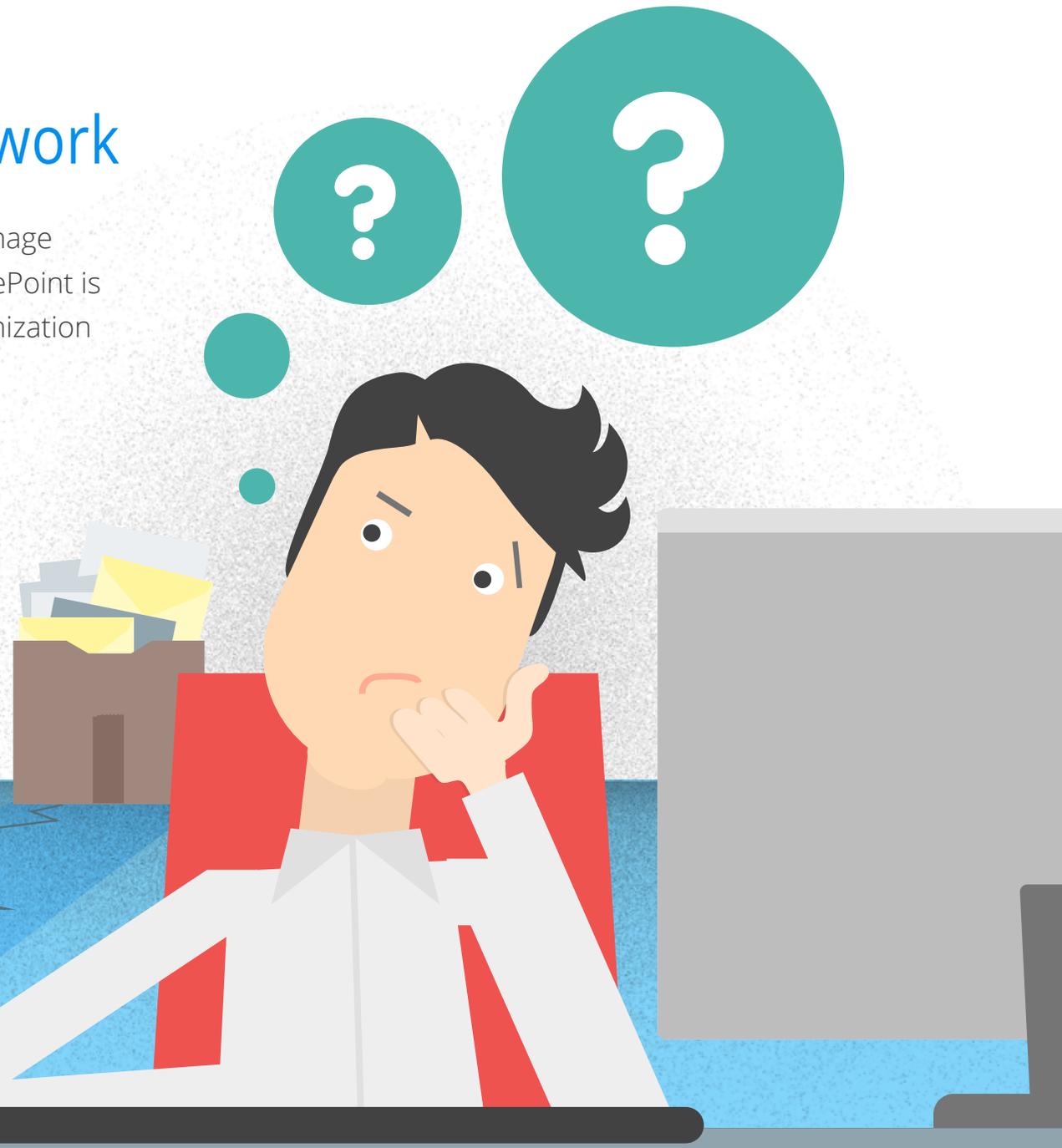
While these issues are important, far more severe are the consequences of non-compliance. For instance, if a financial audit discovers a company has been non-compliant with the US' Sarbanes-Oxley Act, it can face serious fines. Most significantly, the internal actors responsible for a failed audit can expect dismissal and, in extreme cases, prison sentences.

It is, therefore, crucial to act now and ensure your organization is compliant both in theory and in practice. So, how can you bridge this gap?



Making records management work

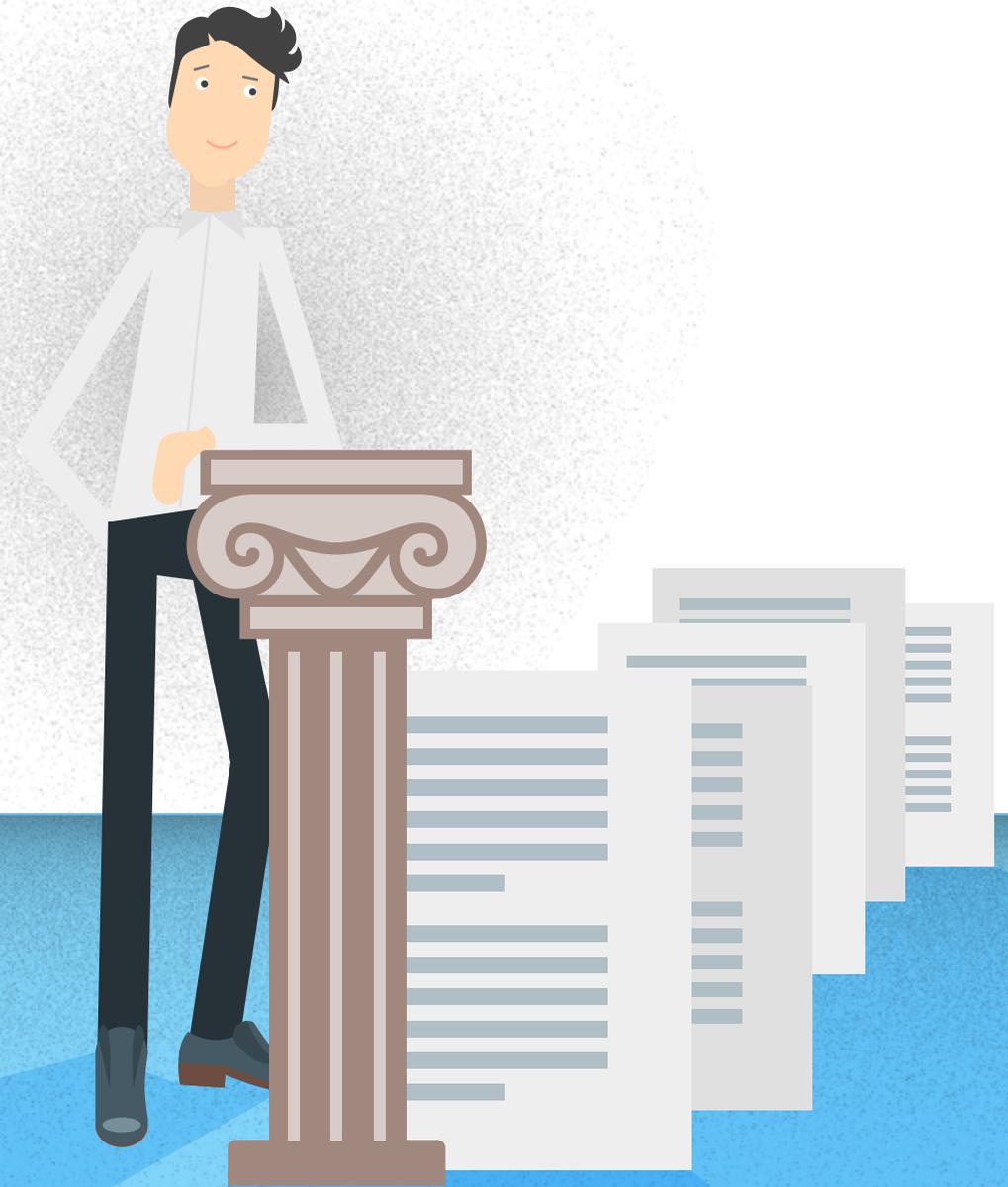
So, what can you do to make it easier and more efficient to manage SharePoint and reduce risk of error? How can you ensure SharePoint is used effectively by your colleagues, avoid damage to your organization and, ultimately, advance your career?



1

Use SharePoint *version history* to have only one copy of every document

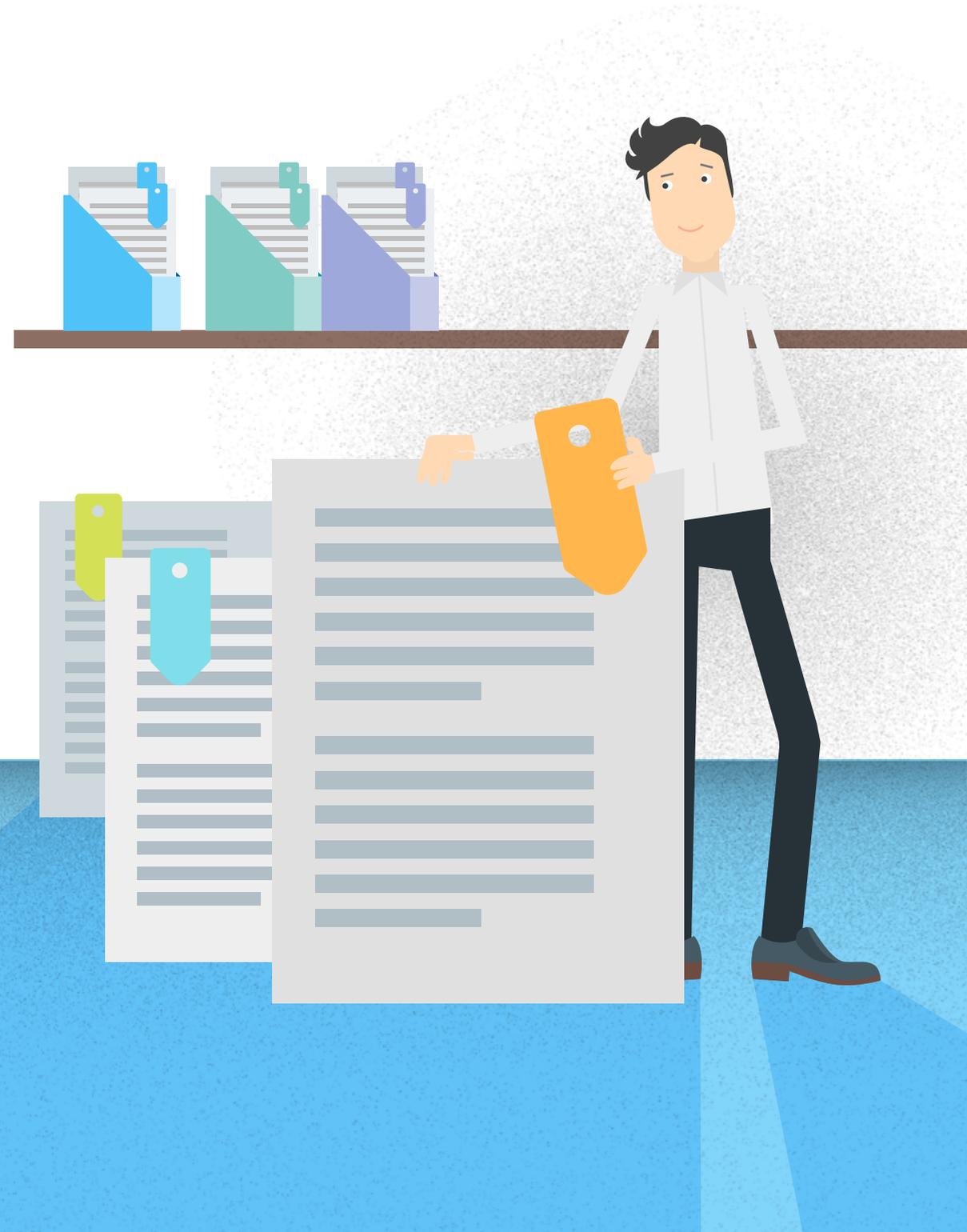
SharePoint's versioning tools offer a powerful way of managing your documents, so changes to a single document are recorded without making multiple copies of its contents. This means only one copy of a document is ever available at one time, and it cuts the risk of document duplication.



2

Use *metadata* more effectively

SharePoint allows you to tag documents and folders with specific descriptions – including owner, date of creation, and title, as well as more complex metadata such as key words that describe the document’s content, subject matter and format. This metadata makes it much easier for your colleagues to find files with SharePoint’s search tools and will also make it easier to surface documents during an audit .



3

***Differentiate* between email records and disposable emails**

A major problem with most email services, including Outlook, is that they force users to mix 'every day', standard emails with those that should be treated as records. When your colleagues receive crucial documents and messages via email – including work orders, invoices and receipts – these are stored in inboxes just the same as emails from colleagues asking them if they want to grab lunch. While best practice would encourage them to store the important emails in SharePoint, the fact is they can often end up in a folder in an individual's Outlook client. And, if she or he leaves the company, you will struggle to ever find and retrieve those records.

It is, therefore, essential to differentiate between these two types of email and make it easier for colleagues to store records where they can be accessed later.

harmon.ie can help. It is embedded within Outlook with access to SharePoint where they can simply drag and drop important emails into the correct locations.



4

Focus on *user experience*

Best UX design concentrates on making complex tasks as easy as possible to complete. At present, SharePoint's UX for managing documents includes too many steps and stages, which tends to dissuade most users from managing emails and documents as they should.

harmon.ie can help. By using harmon.ie within your Outlook window, you can simply drag and drop emails and attachments between your inbox and SharePoint libraries. You are even prompted to add required metadata, so you can find information later on.

Every organization's document and email management rules and requirements are different. However, by implementing the steps outlined, you can create an environment where it becomes far easier to store documents correctly, thus avoiding the risks of poor information and document management and failed audits.



Use harmon.ie to build bridges

As this eBook has highlighted, it is no longer possible to simply treat document and email management as an afterthought. Besides email chaos and document confusion, your organization also faces financial risk by failing to manage its environment correctly.

 **harmon.ie** Designed to overcome the complexity of correctly storing documents and emails in SharePoint, harmon.ie turns a process, which previously involved downloading files, uploading them to SharePoint in a new window, adding metadata, and following other rules, to a single-step process.

Once harmon.ie is installed in your Outlook client, it is actually harder to break your document management rules by not doing the right thing.

At harmon.ie, we like to say, “We make the right thing the easy thing.”

harmon.ie offers a quick and easy way to stay compliant and efficient. And now, harmon.ie is available for Outlook on Mac, and OWA on mobile devices and in the browser.

Try harmon.ie, it's free

