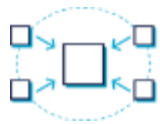
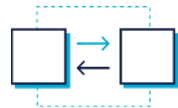


Manage Records in Email and Microsoft Teams as part of a Holistic Records Management Solution



Unify
Your Infrastructure



Manage
People and Teams



Modernize
Business Solutions

Presenters: Manage Records in Email and Microsoft Teams

- **Ron Johnsen**

Vice President, Customer Success



- **Jim Duncan**

Chief Architect, ShareSquared
Microsoft Certified Master



- **David Kruglov**

Managing Director



Agenda: Manage Records in Email and Microsoft Teams

Overview

- Introduction
- Webinar Recap

Capstone, Taxonomy, and Teams Demos

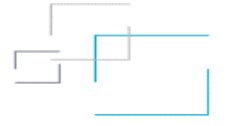
- Implementing Capstone using Exchange-based Policies
- Functional and Topical based Taxonomy
- Microsoft Teams: *Organizational Change Management Use Case*

Records Management for Email and Microsoft Teams

- Harmon.ie Overview
- SmartAssistant Demo

Closing and *Extended QA*

Intention: Intention for the Webinar



- Further explore an O365-based EDRMS solution
- Get people excited about using Microsoft Teams beyond a replacement for Skype
- Present ideas and solutions for managing email and Microsoft Teams-based records
- Foster a community of people who endeavor to improve collaboration and records management
- Answer any questions you may have

Be of Service to You!

ShareSquared: Who We Are



- Solution provider specializing in SharePoint/O365 for 15 years
- Collab/Intranet, EDRMS, Workflow, Migration, etc. Solutions
- Reseller and Implementation Partner for products such as:



EDRMS: Webinar Series



Previous Webinars

- Develop an Effective RIM Program and Retention Schedule
- Managing Records in SharePoint and O365; What Works and What's Missing!
- Implement a Full-Featured EDRMS Solution Across Multiple Repositories
- *Manage Records in Email and Microsoft Teams as part of a Holistic Records Management Solution*

Upcoming Webinars

- Using Auto-Classification to Identify Document/Record Types **July 22nd**
- Maximizing O365 User Adoption **August 19th**
- Electronic Forms, Workflow, and Robotic Process Automation **September 23rd**
- Advanced Content Services for O365 including Document Capture, Indexing, and OCR **October 21st**

Poll: How are you using Microsoft Teams?



Select all that Apply:

- Virtual Meetings and Calls
- Chat / Instant Messaging
- Content Organization
- Navigation for related applications
- Not using Teams

Next Up:

➤ *Capstone, Taxonomy, and
Microsoft Teams Demos*

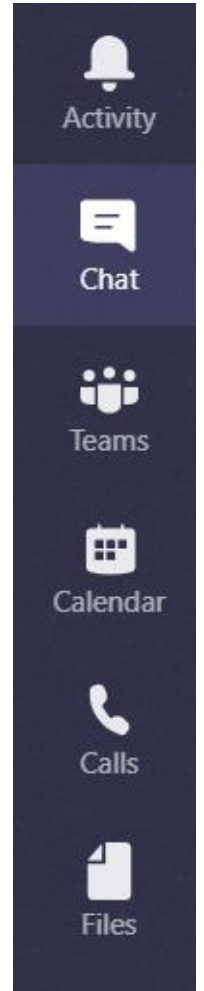
Microsoft Teams: Overview

Replacement for Skype

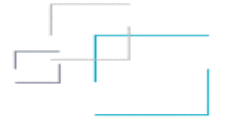
- Virtual Meetings/Recordings, Calls/Voicemail, and Chat
- [Skype End of Life](#): July 31, 2021

What is a “Team”

- User Experience that *aggregates and contextualizes* several content types and sources (e.g. chat)
- Teams can be subdivided into Channels
- Each Channel can have navigation to related apps/info
- Includes Activity Alerts (e.g. Planner Tasks), Calendars, and Documents
- Extends/Overlays an O365 Group



Strategy: Capstone



Background

- [Emerged from NARA in August 2013](#) with an implementation deadline of 12/31/16
- Primary goal is to ensure that “email records appraised as permanent are preserved by agencies and transferred to NARA”
- Big bucket policies based on organizational role (e.g. Board Members, Officers, etc.)

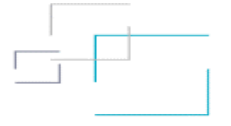
Pros

- Works well for broad-based “Retention Management”
- Easy to implement
- Implemented server-side and does not require end-user involvement

Cons

- For email only, not tied to specific Record Categories
- Metadata is limited to typical email information (e.g. sender, recipients, date, etc.)
- Email body and attachments are unstructured content
- Does not address findability or capabilities such as workflow

Strategy: Functional / Topical Taxonomy



Functional Taxonomy

- Based on the function the record performs
- Aligns with Record Categories
- Typically implemented using a Content Type

Examples:

- **Contract:** a written or spoken agreement, especially one concerning employment, sales, or tenancy, that is intended to be enforceable by law
- **Invoice:** an itemized bill for goods sold or services provided, containing individual prices, the total charge, and the terms

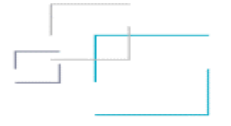
Topical Taxonomy

- Refers to the metadata that describes a specific record
- Metadata is stored in the fields of a Content Type

Examples:

- **Contract:** Type, Effective and End Dates, Parties, etc.
- **Invoice:** Vendor, Due Date, Amount, etc.

Demos: Capstone, Taxonomy, and Microsoft Teams



- Implementing Capstone using Microsoft Exchange-based Policies
- Functional and Topical Taxonomy
- Using Microsoft Teams
 - *OCM Portal Use Case*



Poll: Do you Save, Access or Share Content Using Teams?

- Never
- Rarely
- Occasionally
- Frequently
- All the time

Next Up:

➤ *Harmon.ie Overview and Demo*

Harmon.ie: What Information Do You Need to Save?



Email 80%

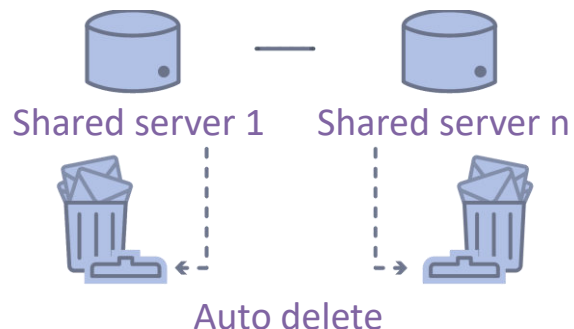


X

- 1000 Users
- 100 Emails/day
- 5% Business records
- 220 Working days/year

1,100,00 Records/year

Documents 15%

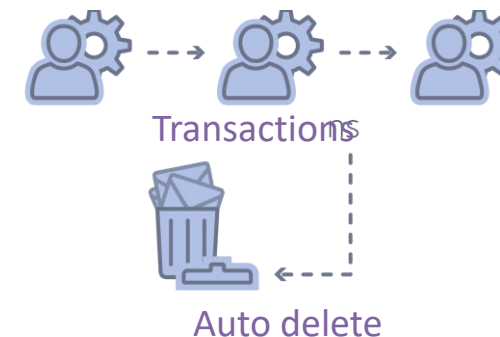


X

- 1000 Users
- 1 Document/day
- 95% Business records
- 220 working days/year

209,00 records/year

Workflow 5%



X

- 2 Custom work flow/year
- 100 Work flow users
- 1 Transaction/day
- 220 working days/year

44,00 records/year

Source: Rimtech, "[The Role of Email in RIM Compliance](#)"

Harmon.ie: Top 4 Email Management Challenges

1. Inconsistent email capture and classification

- Insufficient capture
- Business operations losses
- Liability

2. Inconsistent retention schedules

- Non-compliance
- Over-retention
- Information security breaches

3. Non-standard and ineffective search

- Complicated event/document correlation
- High eDiscovery costs

4. Lack of end-to-end governance

- Inability to effect organization changes

Harmon.ie: The Key to Successful Email Management



CAPTURE

&



CLASSIFY

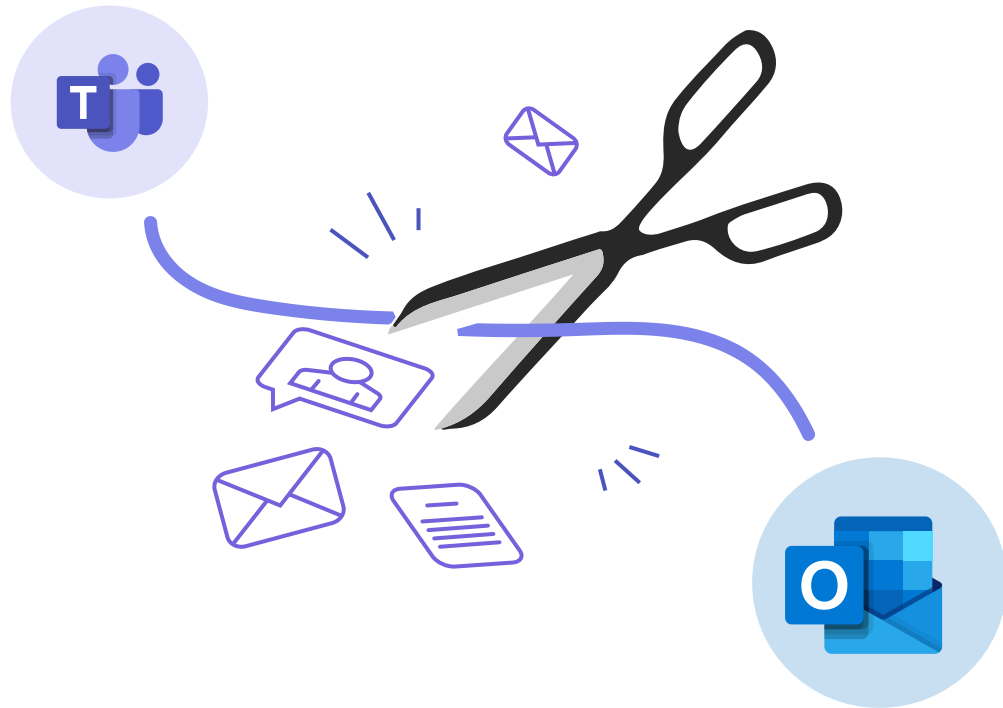


DISCOVER

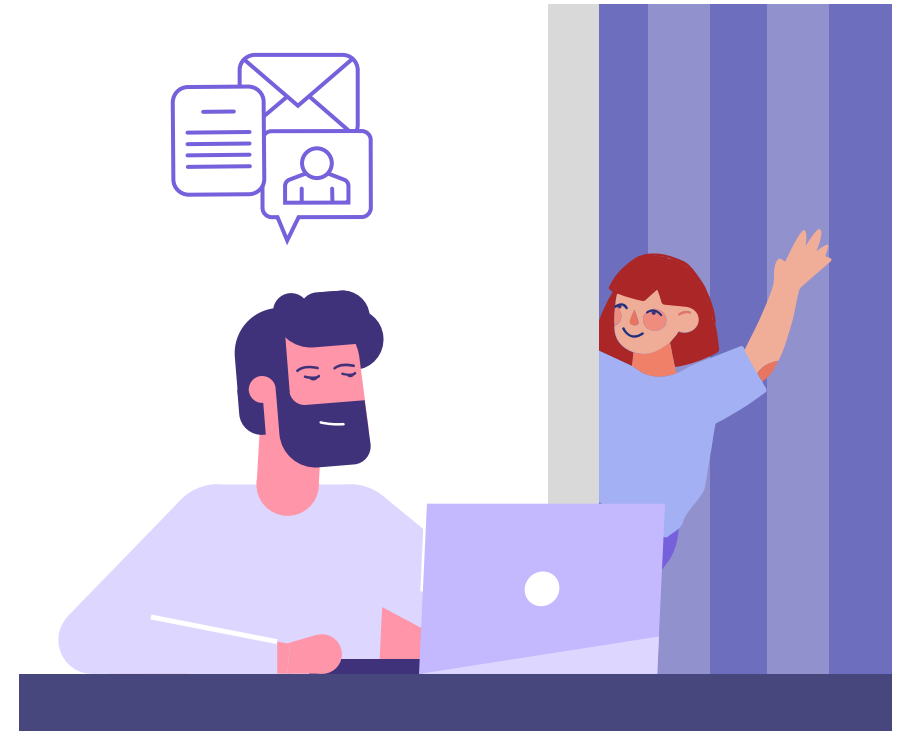
Harmon.ie: The Challenge



Disconnected Business Conversations



People need to be self-sufficient



Harmon.ie: Working Remote

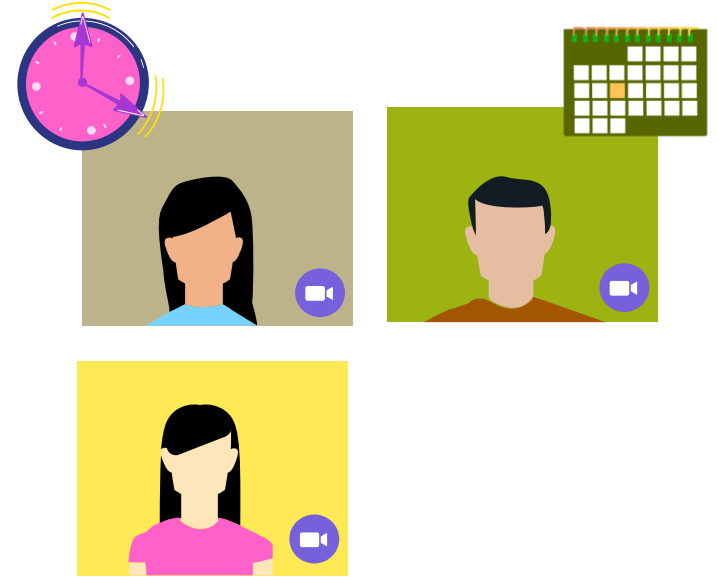


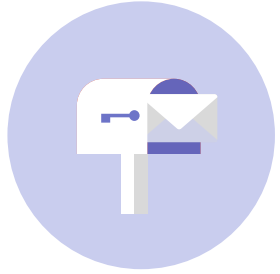
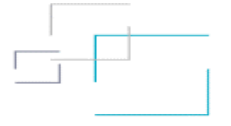
Make the Right Thing the Easy Thing



Help People Be More Self-Sufficient

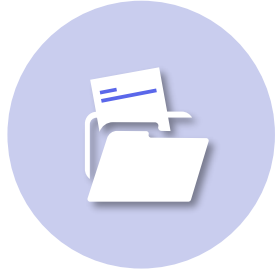
Make capture, classify, search easier





Stay in the comfort zone - people are already using Outlook

- Make it easy
- Promote self-sufficiency
- Use an integration solution



Simplify Capture and Classify

Store content in a centralized place – SharePoint/Teams



Enhance Findability

Search is critical

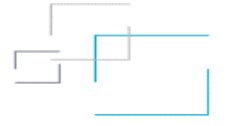
Demos: [Harmon.ie](https://www.harmon.ie)



- Email Management
- Managing Microsoft Teams Content



Poll: Would you like us to follow up with you?



Select all that Apply:

- Yes, to discuss a project
- Yes, to see a demo
- Yes, to get an estimate
- Yes, regarding a Proof of Concept
- Not at this time

Next Up:

➤ *Closing and Extended QA*

Resources: Webinars and Links



Upcoming Webinars

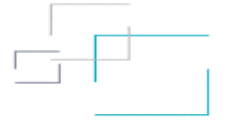
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- **October 21st:** *Advanced Content Services for Office 365 including Document Capture, Indexing, and OCR*

On the Web

- [Harmon.ie 30-Day Eval](#)
- [Microsoft Teams Overview](#)
- [Webinar Presentations and Recordings](#)

The screenshot shows the Harmon.ie 8.1 trial download page. At the top, the Harmon.ie logo is displayed in red and blue, followed by the text "harmon.ie 8.1" in red. Below this, a blue banner contains the text "Download a 30-day eval here" in white, with a white downward arrow pointing to the URL "<https://harmon.ie/enterprise-trial>" in white. At the bottom of the banner, the text "Contact information: Sales@harmon.ie" is displayed in white.

Closing: Call to Action and *Extended* QA



Contact us to:

- Brainstorm about your project/initiative
- Schedule an in-depth demo
- Get an estimate for a project
- Get pricing for a product we resell (e.g. Gimmel or Harmonie)
- Discuss a Proof of Concept
- Get a sample RFP solicitation
- Get information about successful O365 projects

Contact Info:

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David Kruglov

David@ShareSquared.com

share²