iomer | Herald

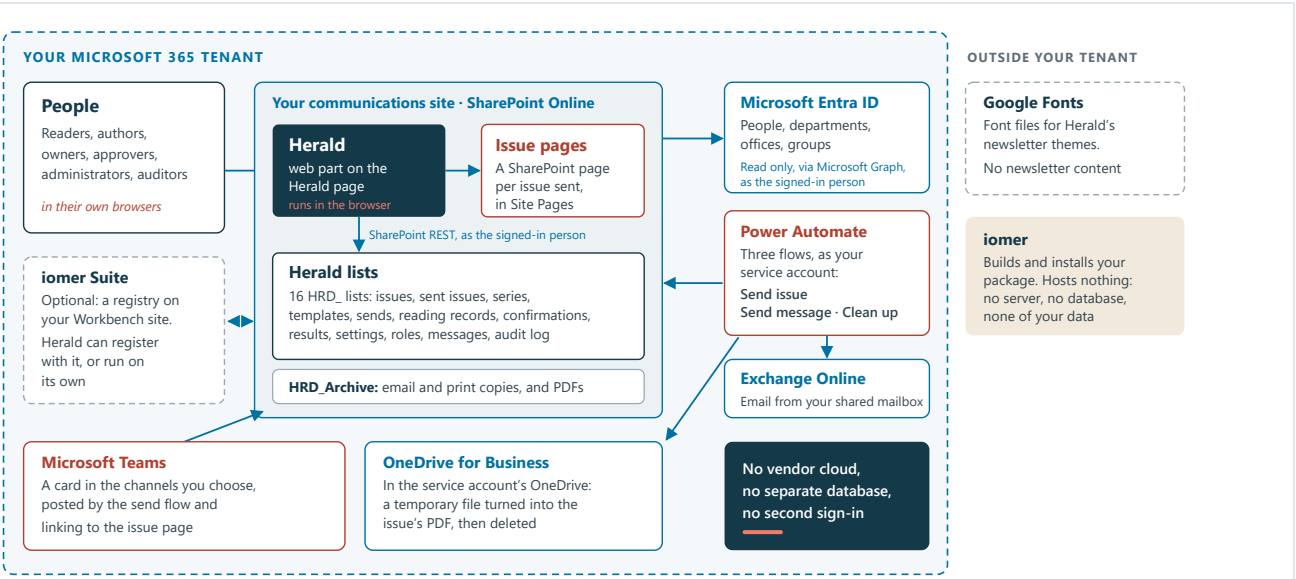
HERALD · IT OVERVIEW · NOVEMBER 2026

Herald for IT and Microsoft 365 admins

Herald is a newsletter studio for SharePoint. It's a solution accelerator: iomer builds it for your organization as a single deployment package and installs it in your own tenant. There is no vendor cloud, no second sign-in, and no new place for your content to live.

ARCHITECTURE

How Herald fits into Microsoft 365



Your administrators change series, audiences, templates, content sources and the newsletter brand in Herald. Changes to the web part come as a new version of your package, built and installed by iomer.

WHAT IOMER INSTALLS

One package, built for you

- ✓ One SharePoint Framework package in your app catalog, Herald by iomer, on a Herald page on your communications site
- ✓ Herald's lists on that site, set up with your series, audiences, templates, newsletter brand, content sources and roles
- ✓ Three Power Automate flows, Send issue, Send message and Clean up reading records, running as your service account and sending from your shared mailbox
- ✓ What differs between organizations is mostly configuration, not new code, so the foundation your security review looks at stays the same from build to build.

WHERE YOUR DATA LIVES

In your tenant, as SharePoint content

- ✓ Issues, settings, reading records and the audit log are list items, pages and files on one site, under your security, retention and data residency settings
- ✓ No separate database, server or vendor cloud. Nothing is hosted by iomer. Nothing is stored outside your tenant, and email goes only to your own email domain
- ✓ Everything Herald does in the browser runs as the signed-in person, so SharePoint permissions decide what each person can open; once permissions are applied, readers can't open drafts
- ✓ The one outside request: readers' browsers load the newsletter themes' fonts from Google Fonts, which sees their IP address; no newsletter content goes with it

WHERE EACH RECORD LIVES

Lists, a library and pages on your Herald site

WHERE	WHAT IT HOLDS
HRD_Issues	Drafts, issues in review and scheduled issues. Herald's roles only: authors and owners edit, approvers and auditors read
HRD_Editions, Site Pages	Each sent issue exactly as readers got it, and a SharePoint page per issue. Readable by everyone on the site, unless the issue was secured to its audience
HRD_Archive	Email and print copies and PDFs, in a folder per issue; a secured issue's folder takes its permissions
Series, campaigns, sources, settings, roles	HRD_Series, HRD_Campaigns, HRD_Sources, HRD_Settings and HRD_RoleAssignments. Everyone reads; owners or administrators edit
HRD_Templates, HRD_Deliveries, HRD_Approvals	Saved templates, each send the flow picks up, and approval decisions. Herald's roles only
HRD_Reads, HRD_Acknowledgements, HRD_Rollups	Reading records and confirmations: each reader sees only their own; owners, administrators and auditors read all. Results per issue, as totals
HRD_AuditLog, HRD_Notifications	Every change made in Herald, and the messages the Send message flow sends. People see their own; administrators and auditors see all

Sixteen HRD_ lists and the HRD_Archive library in all (with HRD_Preferences), plus one that records the setup version, created by the guided setup with their columns, indexes and views.

PERMISSIONS

What Herald asks for

PERMISSION	APPROVED BY	WHY
Microsoft Graph User.Read.All, delegated	A SharePoint administrator, once	Departments and offices for audiences, audience sizes and results by location; people search. Read only, as the signed-in person
Microsoft Graph GroupMember.Read.All, delegated	A SharePoint administrator, once	Finding and counting Entra groups, and knowing which groups a reader belongs to, for roles and targeted sections
SharePoint	Each person's own access	Everything else. Apply permissions gives each list its designed permissions; site owners keep Full Control

The demo package requests none. Without the Graph approvals, Herald still emails groups at their addresses, but can't count people or send to offices or departments.

AUTOMATION

Three flows

FLOW	WHAT IT DOES	IF IT'S OFF
Send issue	At the chosen time: checks it's still scheduled, publishes the page, secures it if asked, makes the PDF, emails it and posts to Teams	Nothing is sent; authors can still write and preview
Send message	Emails approvers and authors, and reminders to people who haven't confirmed, in blind copy	Approvals still show in Herald; reminders can't be sent
Clean up reading records	Nightly, deletes reading records after your retention period, once results exist	Reading records are kept

All three run as a licensed service account with Send As on the shared mailbox and Full Control on the Herald site, on standard connectors, and email only your one email domain.

LICENSING PREREQUISITES

Microsoft 365 plans Herald works with

MICROSOFT 365 PLAN	READING ISSUES ON THE INTRANET AND IN TEAMS	GETTING THE EMAIL	WRITING, APPROVING AND OWNING
E5	Included	Included	Included
E3	Included	Included	Included
Business Premium	Included	Included	Included
F3 (frontline)	Included	Included, in its kiosk mailbox	Ask your licensing partner
F1 (frontline)	Included	No mailbox	Ask your licensing partner

No add-on licence for readers or authors; people without a mailbox read on the intranet or in Teams. Microsoft changes plan contents, so check them before you buy.

BEFORE YOU START

What you need

- ✓ SharePoint Online, modern pages and a tenant app catalog
- ✓ A SharePoint admin to approve two delegated Graph permissions
- ✓ A site owner on the Herald site, and a shared mailbox for the newsletters
- ✓ A licensed service account for the flows, its four connectors in one DLP data group
- ✓ Departments and office locations recorded in Entra ID

DELIVERED BY IOMER

What we do

- ✓ Agree your series, audiences and templates with you
- ✓ Build your organization's deployment package
- ✓ Install it in your tenant and test it there, flows and test sends included
- ✓ Pilot it with one series and one audience
- ✓ Launch with training for authors, approvers and newsletter owners

MICROSOFT 365 UPDATES

Updates, rollback and removal

Updates and rollback

Fixes for Microsoft 365 changes come as a new version of your package from iomer. To roll back, upload the previous package and flows.

Removal

Turn off the flow settings and the flows, then remove the app. Lists, pages, PDFs and data stay until a site owner deletes them.

PLAIN FACTS TO PLAN AROUND

Exchange's limits

10,000 recipients a day per mailbox, about 4 MB a message. We size your largest sends with you.

Results

Worked out when an owner or administrator opens Analytics. Totals only; small groups merged.

Build status

Checked in iomer's automated tests, not yet on a tenant; version 1 sent an issue on iomer's tenant on 8 October 2026.

Residency

Stored where your SharePoint content is. Microsoft's ISO/IEC 27001 and SOC 2 reports cover Microsoft 365, not iomer.