

Extending SharePoint 2013 for Email Management

Enhance baseline SharePoint Site Mailbox functionalities and broaden the enterprise content management (ECM) capability of SharePoint

SharePoint 2013 has positioned as ECM platform much stronger than previous releases with the introduction of Discovery Center, eDiscovery, Team Folders, Site Mailboxes, and SkyDrive Pro. Managing Emails in SharePoint becomes relevant when contents of emails must be retained as business records. In this scenario, Emails must be viewed in content of Records management and email records management must align with corporate records management strategy. Integration of Outlook and SharePoint was always a missing functionality and Microsoft has relied on vendors to provide email management on SharePoint platform.

SharePoint 2013 has introduced Site Mailboxes allowing direct integration of Outlook and SharePoint. Email messages now can be managed within SharePoint, addressing the organizational governance requirements for contents and to define the retention requirements of Exchange contents on site level.

We will review the benefits of Site Mailboxes and highlight the areas in which PageLight delivers business value over out of box SharePoint 2013

Site Mailboxes - A primer

From user perspective Site Mailbox is a central email and document sharing location that is accessed from a SharePoint site. Team can store the email conversations and documents relevant a project in a single repository. Site Mailboxes are Apps (Site Mailbox App) to integrate and surface Exchange Mailbox in a SharePoint site. Site Mailbox will bring SharePoint 2013 and Exchange 2013 within Microsoft Outlook 2013 Client.

Since the contents are managed within SharePoint, governance and regulatory standards are applied automatically for Exchange inbox.

Organizations must understand SharePoint 'Foundational ECM Features' and adopt third party add-ons to fulfill the requirements of specific business and industry vertical needs.

Integrating SharePoint and Exchange Inbox offers following benefits

- End users can interact with both SharePoint and Microsoft Exchange without leaving Outlook. Emails can be kept in context of the project the users are working on. Users can add contents (emails and attachments) to SharePoint with familiar drag and drop
- A common retention policies can be applied to both SharePoint and Exchange mail boxes contents guaranteeing content compliance requirements
- Contents stored in Site Mailboxes will be part of eDiscovery process and can be put on legal hold as required
- Documents from Site Mailboxes can be sent as a link in Email, thereby avoiding duplicate storage and decreasing the mail box sizes

Extending SharePoint with PageLight

PageLight enables Site Mailboxes to be Metadata and Content Type aware. Email properties can be extracted as Metadata and contents tagged when filed in SharePoint. Also Contents of Site Mailboxes and other SharePoint document libraries can be searched from Outlook using PageLight extensions.

Site Mailbox feature requires SharePoint 2013, Outlook 2013, and Exchange 2013. PageLight email management apps support Outlook 2013/2010/2007, all versions of Exchange, and SharePoint 2013/2010/2007.

Effective ECM implementation is not possible without support for Metadata. This limitation of Site Mailbox is addressed by PageLight and extends SharePoint 2013 as an effective Email Management platform

Feature	SharePoint 2013 Out-of-box Mailboxes	PageLight Extensions
Automatic Email Metadata Extraction	Email attributes such as To, From, Received Date etc. are not captured and promoted as SharePoint columns	Capture and promote email attributes when saving emails and attachments. Contents are tagged automatically with Email Metadata when saving Emails and Attachments
Metadata Support	No support to tag contents with custom Metadata when uploading emails or documents	PageLight allows users to enter Metadata for contents
Content Type Support	Mailboxes does not support Content Type selection in the destination document library.	Full support for Content Type selection and promoting users to tag content appropriately when filing to SharePoint
Metadata Validation	Column and list validations are not enforced when using Site Mailboxes natively	PageLight enforces validation of Metadata when saving to SharePoint
Send and File	Emails can be Cc'd to Site Mail boxes but saved emails does not contains Metadata	PageLight supports 'Send and File' to simultaneously send an email and file it to SharePoint. Users can select SharePoint destination and tag the contents with custom Metadata
Duplicate Email Filing Support	Emails are stored with filename which is the subject of email. This will result in false duplicates when multiple emails are filed using same subject	PageLight file naming convention can be customized which overcomes the issues and also prevents users from filing duplicate emails to same SharePoint destination
Rename file when saving to SharePoint	Emails are saved with file name automatically using subject of email	PageLight extends Site Mailboxes to rename files or email attachments when saving to SharePoint libraries

Limitation of Document Library	Only 10 Site Mailboxes are supported in Outlook 2013	PageLight supports large Folder hierarchies and also grouping of folders based on business requirements
Integrated Search	Contents of SharePoint and Outlook cannot be searched based on Metadata.	PageLight allows searching of contents across single and multiple SharePoint sites for contents and by Metadata
Categorize Emails	Emails saved in SharePoint cannot be identified easily	PageLight allows emails to be categorized when filed in SharePoint. Users can see emails in a glance which are saved in SharePoint
Intelligent saving of contents	N/A	PageLight allows automatic save of contents to SharePoint with user prompt. Email metadata or computed formula can be used to set the column values in SharePoint
Windows File Explorer Support	Site Mailboxes destination are not available from Windows File Explorer	Users can move contents from file share to Site Mailbox destinations using familiar drag/drop
Central Management	No support for auto configuration of SharePoint libraries across different types of users	PageLight allows SharePoint destinations like document libraries, and folders to be pushed to users based on business rules



Download PageLight

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About SAI Innovations

SAI Innovations provides business technology services for Enterprise Content Management and CRM consulting. SAI specializes in Microsoft SharePoint and Dynamics CRM technologies to develop Cloud or On-premises solutions. Companies can achieve regulatory compliance and reduce risk with use of PageLight, our award winning Document Management solution for SharePoint.

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