

# What's the right email management solution for your organization?

Why SharePoint might be your best option



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# Weighing the options for email management

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**The modern workplace** is always evolving. New tools and work practices are constantly being introduced to boost productivity, streamline processes, and aid collaboration. Throughout all this change though, there is one factor that remains constant: email continues to be a key medium for communications of record.

Email remains crucial to the modern-day enterprise, making up the vast majority of an organization's documents of record (contracts, proposals, client correspondence, formal reviews, etc.). These must be stored, classified, and managed correctly so that employees can easily access them for both productivity and compliance purposes.

There are many email management options available, including several from Microsoft. And since you have invested in Microsoft technologies, it makes sense to investigate what can be done with the tools you already own. In this eBook, we explain:

- The keys to email management best practice
- Which options are available within the Microsoft toolset
- The unrealized potential for email management in SharePoint



# The keys to email management best practice

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To begin, we should define the key requirements to successful email management. There are three fundamental parts to the process of email management:

1. Effectively **capture** all necessary emails and documents and store them in a centralized repository, so they can be accessed for audits and e-discovery
2. Accurately **classify** emails and documents using a uniform taxonomy
3. Effectively **discover** emails and records when you need them

By handing the end user ultimate control and using a centralized repository to store information, each step in the process can be made easier.

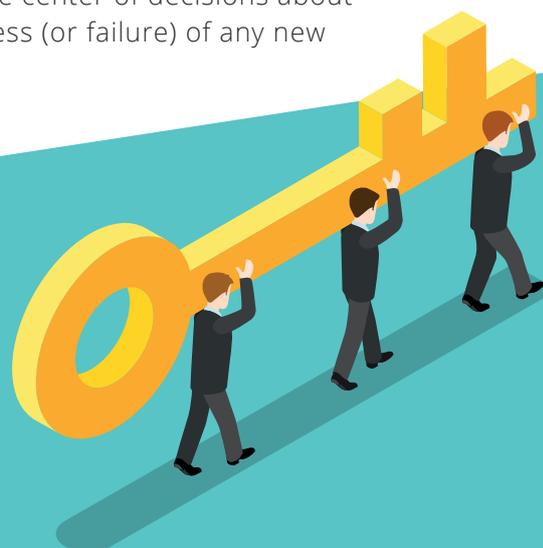
## Using a centralized repository

Managing emails and other documents of record in a centralized repository is crucial. Emails which are locked in personal inboxes become inaccessible to colleagues or auditors who need them later. Emails left in personal inboxes contain information that is cut off and lost from the rest of the organization.

For governance and compliance, organizations need to be able to access documents of record on demand. When important information about customers or clients is lost in the depths of an ex-employee's personal inbox, or an employee is on vacation, the organization faces a serious problem. Also, the inability to add relevant and correct metadata means that emails are incredibly hard to discover later.

## User-driven email management

When organizations are considering which technology to deploy, they often forget to think about the end user. Organizations need to put their people at the center of decisions about technology, as ultimately it is end users who determine the success (or failure) of any new technology initiative.



An effective email management solution needs to be molded around how end users *like to work* and *how they work best*. For email management success, you need to find a solution that seamlessly incorporates into the daily workflow of end users. This means integrating it directly into email clients like Outlook, the place where Office 365 users spend their day.

Another important practical consideration: you need to give end users the tools to decide what to capture. Experience shows that business records represent approximately 5% of emails that employees receive. That means 95% of emails are transitory and should be deleted over time. These 5%<sup>1</sup> of emails are documents of record and need to be saved, stored, and classified accordingly. Because the business user is best acquainted with the nature of the email content, it is they who can best decide which emails need to be maintained, and which ones need to be discarded.

However, this needs to be positioned within your organization's wider retention and disposition policy. This is the process where a business defines what needs to be kept and deleted. But in this eBook, we are focusing on the strategy and mechanics of successful email management regardless of the policies your organization puts into practice.

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<sup>1</sup> RIMtech. 2016. The Role of Email in RIM Compliance. Available online: <https://pages.harmon.ie/information-governance-EN-wpaper-registration.html>



# Microsoft-based solutions for email management

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You already use many Microsoft productivity tools to get business done. As such, it makes sense to use these tools for email management as well. This section details four distinct methods for managing emails using the Microsoft toolset you already own. The four methods are as follows:

1. Records management storing emails in Exchange and documents in SharePoint
2. Records management using Group mailboxes for emails and Teams for documents
3. Office 365 Labels
4. Records management storing emails and documents in SharePoint

Each method has its pros and cons, and additional costs which might influence your decision, which are broken down below.

## 1. Emails in Exchange and Documents in SharePoint

### How does it work?

In this scenario, emails of record are stored on Exchange, while documents of record are stored on SharePoint.

### Pros

Exchange and Outlook are tools that end users are already familiar with and that their businesses have already invested in. Emails remain in Exchange, which means there is no need for the time-consuming exercise of migrating them elsewhere.

- No need for extensive user training
- No need to migrate emails out of Exchange
- Outlook rules can be used to add automatic functions such as archiving in Exchange Server
- With Office 365 Content Search eDiscovery tool, one search will work for emails and documents

## Cons

It should be easier for knowledge workers to access records, but the Exchange/SharePoint combination can cut knowledge workers off from documents entirely. When emails are saved in one location and documents are saved in another, important records are siloed away in personal inboxes. This presents serious issues for compliance.

- Emails are stored separately from documents, making discovery cumbersome and complex
- No classification for emails, making it almost impossible to find related emails and documents
- Retained messages swell mailbox size
- Retained messages are siloed away from colleagues and auditors and are only accessible to users with special eDiscovery status
- No way to save attachments as records

## Extra costs

- Advanced eDiscovery is required to find documents, which means investing in the 'E3 + Advanced compliance' license or E5 license
- Organizations may need to increase mail storage

## 2. Group mailboxes for emails and Teams for documents

### How does it work?

Often, organizational groups like those that support clients or handle cases, need to retain important client or case emails and documents for future reference. For example: for litigations or regulatory audits. One option for this business case is to correspond with using Group mailboxes and to share client documents internally using Microsoft Teams. Here's how it works:

**Emails:** When you create a Microsoft group, a shared Outlook mailbox is created, and emails can be sent to this group's distribution list (e.g. an email address). These emails are stored in Exchange and duplicated to every group member. In this way, important group emails are captured in Exchange.

**Documents:** Using Microsoft Teams, you can store files shared by a group as Microsoft Teams documents. These are stored in SharePoint, but in a different part from your managed SharePoint farm, usually accessible only from the Teams browser interface.

## Pros

This approach again makes use of the Microsoft business applications with which knowledge workers are familiar. Teams has proven to be a popular addition to the Microsoft productivity suite, as it allows users to enjoy the benefits of instant messaging, video calling and file collaboration in one place.

- Makes use of the standard Microsoft tools end users are familiar with
- Easy to set up Groups/Teams and get started
- With Office 365 Content Search eDiscovery tool, one search can retrieve emails and documents

## Cons

Although popular, Microsoft Teams is not an enterprise-grade document management offering. Documents are unclassified (i.e. no metadata available) and can easily become lost in long streams of communications. Teams might work well on a project basis, but it does not scale for document and email management across an entire organization.

- No classification for emails, rendering it almost impossible to find related emails and documents
- Not enterprise-grade. For instance, with Teams, there is no ability to structure content in sub-groups e.g. Sites, Libraries, Folders, Document sets, with permissions
- Emails are stored separately from documents, making it very difficult to find all the information related to a case or client matter
- Difficult to save attachments as records
- Users need to manually move email to the Group Mailbox
- Teams documents are stored in a separate SharePoint library without any metadata

## 3. Office 365 Labels

### How does it work?

Office 365 Labels—a new feature of Office 365—can be used to automatically classify content as a record. Labels help organizations identify content that requires additional action. For instance, documents received via email may need to be permanently deleted, others might need to be retained for a prescribed period and then deleted, while others need to be marked as a record and kept permanently. Labels allow you to pre-configure these rules and automatically carry out the correct actions. This can be applied to Exchange, SharePoint, OneDrive, and Groups.

## Pros

Office 365 Labels give organizations the ability to pre-configure what happens to emails. This extra level of control can help ensure that appropriate emails are permanently deleted, retained, or marked as a record.

- Retention policies can be added to labels

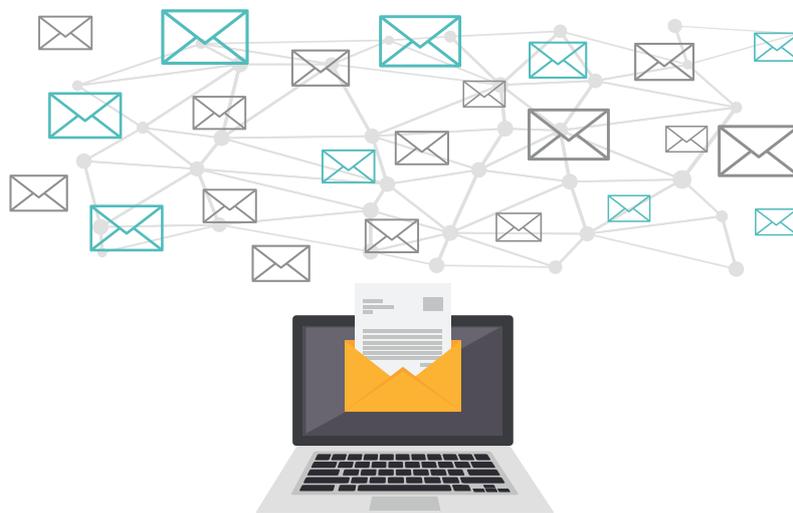
## Cons

Unfortunately, these controls are limited and difficult to administer. It is not an easy solution for all users, who may struggle to apply the correct labels consistently. This can lead to a situation where some users are correctly applying the right labels, but others are not.

- The classification option is very limited. Emails and documents can have only two labels (one retention label, one sensitivity label) and there is no label hierarchy
- For records, labels need to be applied manually in each case, which is not scalable
- It is easy to create conflicting label policies – by applying automated and manual labels. In this case, it is difficult to determine what actually happens to an email/document.
- Users need to apply document library labels to each location separately
- When labels are applied automatically, it can take up to seven days for a label to be applied

## Extra costs

- Office 365 Labels are only available through the E5 license



## 4. Storing emails and documents of record in SharePoint

### How does it work?

In this method, users upload important emails and documents to SharePoint. As such, email and document records are both stored in one centralized location, using a single metadata approach. To help capture important emails, Outlook rules can be employed to automatically tag emails as documents of record and upload them directly to SharePoint.

### Pros

This approach employs one centralized repository, allowing emails to be handled the same as other documents of record. Emails are accessible to employees alongside other documents of record, which is good news for productivity, collaboration, and compliance.

- All records are stored in SharePoint and can be accessed from a single interface
- Content is stored in location structured by Sites, Libraries, Folders and Document Sets using built-in permissions
- One uniform metadata convention for all records
- All records are subject to the same retention/disposition policies
- Email threads can be combined to a single record
- eDiscovery (i.e. Search, Filter, Views) captures all records with the same process and procedures

### Cons

An additional step is needed for the business user to upload and add metadata to email messages.

- Manual upload and application of metadata for emails



# Mastering email management in SharePoint

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Out of the options available in the Microsoft toolset, only the last one, storing emails and documents in SharePoint provides organizations with the all-important central repository for emails and documents of record; which is the key to successful records management. Here are the reasons that make SharePoint the most appropriate place for storing both emails and documents of record:

- **Effectively capture records**

SharePoint provides a central repository for all documents of record, capturing everything in one place. Emails are treated like all other documents of record, preventing them from being isolated in personal inboxes.

- **Accurately classify records**

SharePoint offers a unified taxonomy for classifying all documents of record, whether it's an email, Excel spreadsheet, or Word document. Items can be classified with metadata so there is a consistent classification scheme for every document.

- **Effectively discover records**

When metadata is applied correctly, all documents of record within SharePoint can be organized in the relevant subsites, lists, and columns that the organization has set up. Search in SharePoint helps users find the documents they need in seconds.

The only thing missing when using SharePoint to store emails and documents is the 'last mile'; i.e. making it easy for the business user to do the right thing by capturing and classifying important emails in SharePoint. The next section describes the 'last mile' challenge and outlines a simple solution - one which enables SharePoint to realize its email management potential.



# The last mile of email management

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The last mile of email management is all about usability and the user experience. Organizations need to rely on the business user to capture and classify records for successful email management, because only they know what needs to be retained. So, a practical solution needs to make it easy for business users to capture and classify information on a consistent basis.

*“For an email management solution to be successful, the end user experience needs to be the focus.”*

Users spend most of their day in Outlook. With email management in SharePoint, there is a step missing to make it easy for users to capture and classify emails. It is not easy for users to apply the relevant metadata to classify emails correctly as this cannot be done from Outlook. So, they either forget or don't bother to do so.

## **harmon.ie brings SharePoint into Outlook**

To improve SharePoint adoption and to ensure email management best practice, you need to make life easier for your users.

harmon.ie solves the last mile of email management by bringing SharePoint functionality directly into Outlook.

With harmon.ie's drag-and-drop functionality, it's easy for users to capture emails and documents to SharePoint, directly from their Outlook inbox. harmon.ie automatically prompts users to add metadata so emails are always classified appropriately. harmon.ie brings powerful discovery capabilities into Outlook so users can find information easily. Plus, with harmon.ie, it is easy to use rules to identify which emails need to be saved to SharePoint; then, harmon.ie automatically captures and classifies these emails using your metadata policy.

## **Email management using topics**

harmon.ie is introducing new capabilities to help capture and classify emails using topics that are derived from email content and headers using Natural Language Processing (NLP). Working together with Microsoft, harmon.ie has built the first enterprise app that uses the Microsoft Graph and new Microsoft Graph Data Connect to automatically apply topics to emails and documents—where topics are typically the names of your projects, products, clients, or services.

Using artificial intelligence to tie your emails and documents together by common topics, harmon.ie makes it easy to identify key emails related to a client or case—even if they have not yet been captured and classified on SharePoint. Using the Microsoft Graph, harmon.ie automatically classifies all Office 365 documents by topics, those from One Drive and Teams, as well as calendar events—making it easy to classify all Office 365 content as records, regardless of the area of Office 365 in which it resides.

Topics represent the next step in solving the problem of email management, by improving how users capture, classify, and discover records. When information is automatically grouped by topics, you can easily identify the emails that need to be captured. Later, it is easy to discover and access all the emails and documents related to a particular topic, in a single screen—regardless of where they are stored within Office 365.

### Focus on the end user

harmon.ie, together with SharePoint, provides organizations with a pragmatic solution for email management using the Microsoft technology they already own. But, most importantly, it makes email management easy for the end user. Increase adoption, usability and maximize your Microsoft investment with harmon.ie.

To find out more, get in touch with a member of the harmon.ie team today.



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



**+1 800-624-6946 – USA**



**+49 715 2602 3001 – GER**



**+44 1494 358340 – UK**



**+33 1.82.73.07.07 - FR**