

A black and white photograph of three business women in a meeting, looking at a laptop. A large purple diagonal overlay covers the bottom half of the image.

**THREE OPTIONS FOR
SOLVING THE EMAIL
MANAGEMENT PROBLEM**

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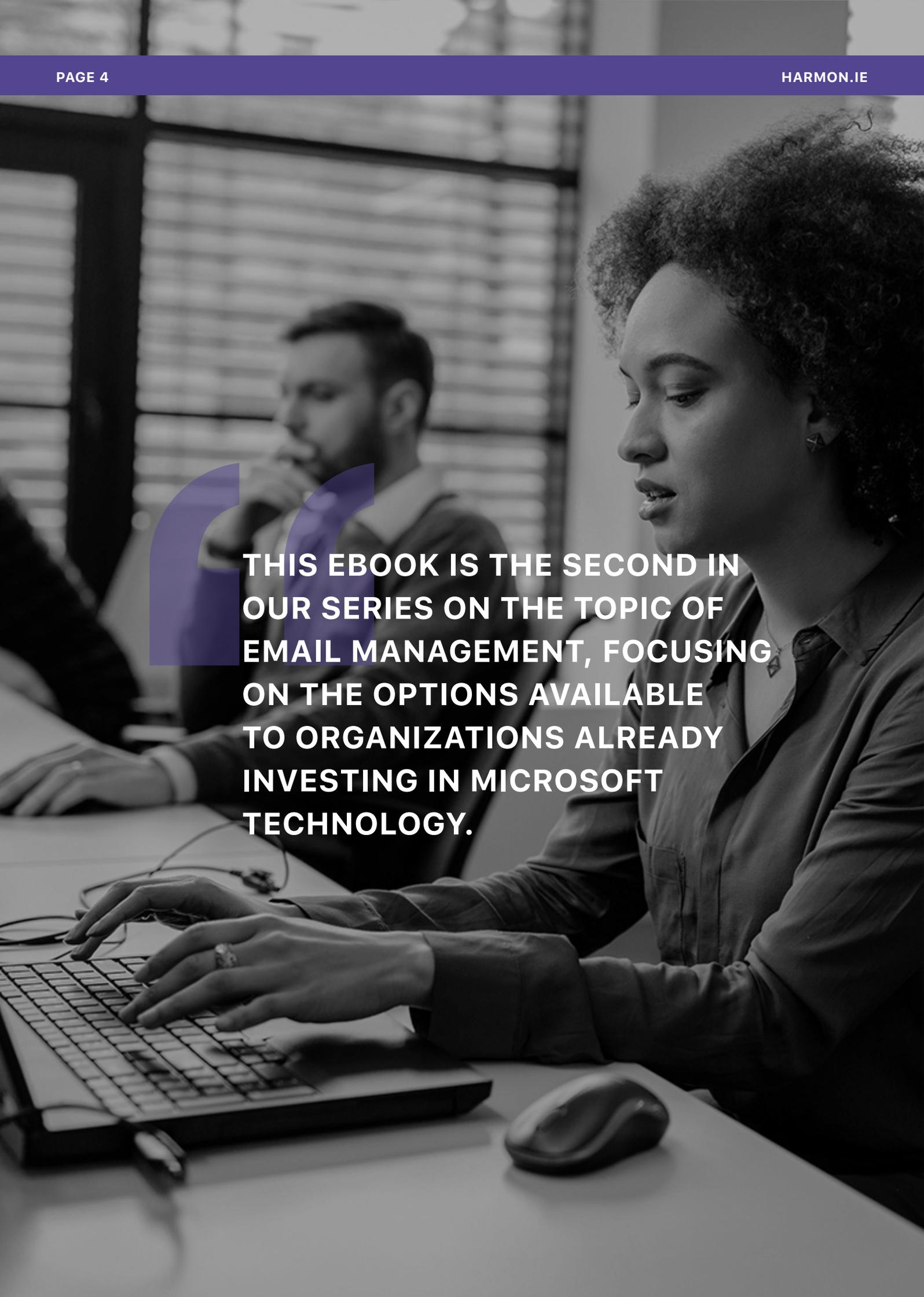
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THE EMAIL MANAGEMENT PROBLEM

Whether your organization is in professional services, state or local government, manufacturing, construction, or legal services, or any other area of business that sends and receives important records via email, managing your important business emails is essential. To avoid becoming swamped by the increasing volume of information and ensure correct storage and simple recovery of important emails, your business needs to ensure that emails (and documents) are kept and classified correctly.

80% OF IMPORTANT RECORDS IN AN ORGANIZATION ARE EMAILS, BUT ONLY 5% OF BUSINESS EMAILS ARE RECORDS.





THIS EBOOK IS THE SECOND IN OUR SERIES ON THE TOPIC OF EMAIL MANAGEMENT, FOCUSING ON THE OPTIONS AVAILABLE TO ORGANIZATIONS ALREADY INVESTING IN MICROSOFT TECHNOLOGY.

THE THREE OPTIONS COVERED IN THIS EBOOK ARE AS FOLLOWS:

Buy a dedicated (Non-Microsoft) email management solution

Use a combination of various Microsoft email and document applications

Use SharePoint as a central repository for both email and document records

01

DEDICATED EMAIL MANAGEMENT SOLUTIONS

When confronted with the email management problem, many organizations are tempted to look beyond the Microsoft technology they already have. This requires investing in a third-party solution with dedicated email management functionality, such as OpenText, Netdocuments, iManage, Mimecast, or Veritas Enterprise Vault.

These tools offer unique capabilities to manage emails efficiently. However, the most obvious downside to this approach is the unnecessary cost of spending money on a brand-new solution and the training that will be necessary to get your users up to speed with the new technology.

Let's take a closer look at some of the pros and cons.



PROS

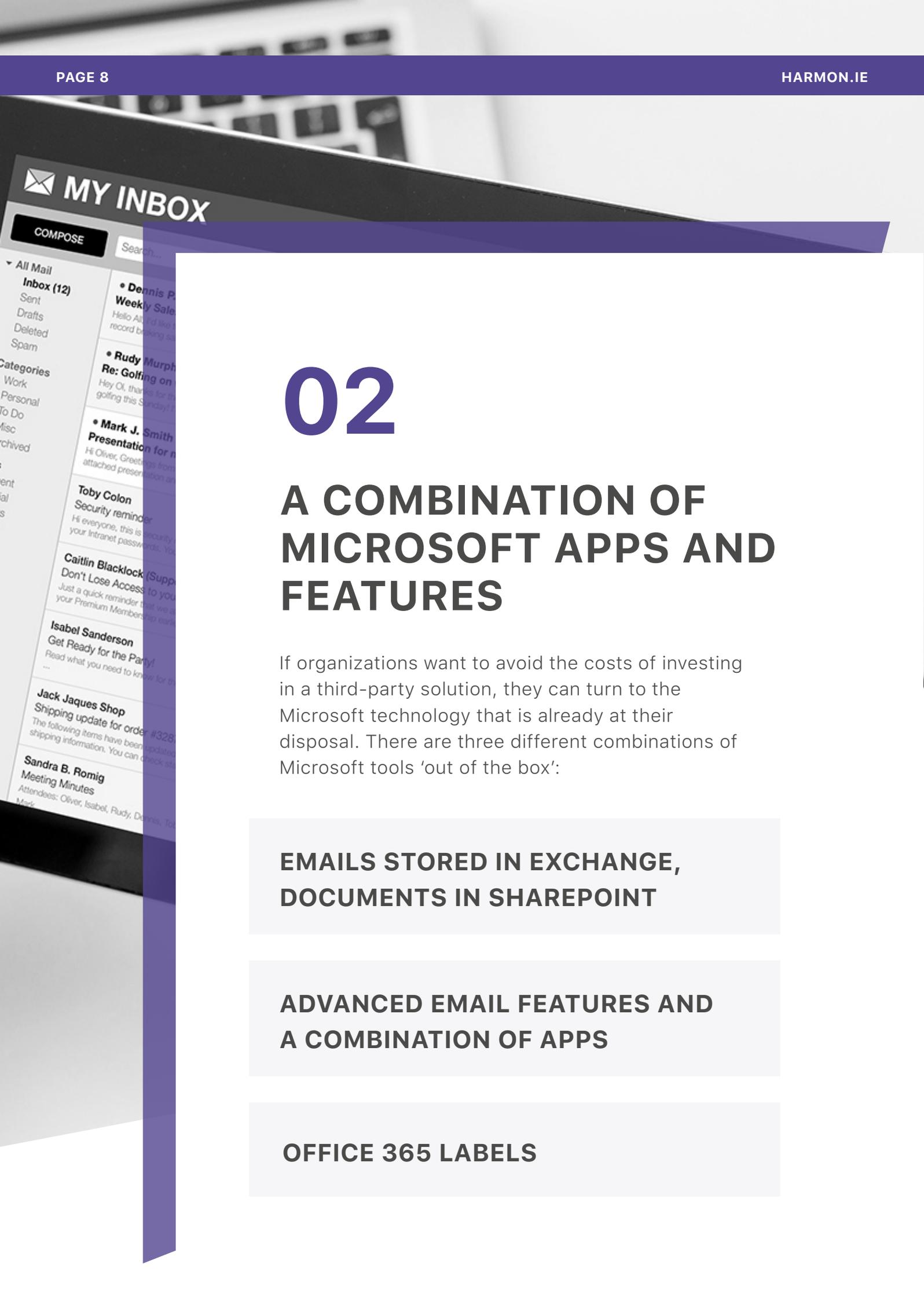
The main advantage of these third-party solutions is that they are tailored to the task of email management – and some are industry-aligned. Tailored solutions offer best of breed features:

- Intelligently predict which folder to file a particular email
- Large file-size storage capabilities allow you to handle large amounts of data per file
- Top of the range security is built into the solution
- Advanced analytics based on user activity, often tailored to specific industries to help professionals work smarter

CONS

The main downside to this approach is the cost and complexities associated with rolling out new technology e.g. training, user adoption, etc. Specifically:

- Additional cost to buy and support
- Huge overhead in integrating, deploying, and managing with existing tools and infrastructure
- Considerable training and roll-out initiatives to get the user adoption levels you need to make the solution work for the organization.
- These solutions often offer a wider range of functions than you need to fulfil your business requirements
- An additional vendor/product to maintain, service, and train employees

A screenshot of an email inbox interface. The top left shows an envelope icon and the text 'MY INBOX'. Below it is a 'COMPOSE' button and a search bar. The inbox list includes several emails with preview text. A large purple graphic element is overlaid on the right side of the page, containing the main title and three feature boxes.

MY INBOX

02

A COMBINATION OF MICROSOFT APPS AND FEATURES

If organizations want to avoid the costs of investing in a third-party solution, they can turn to the Microsoft technology that is already at their disposal. There are three different combinations of Microsoft tools 'out of the box':

**EMAILS STORED IN EXCHANGE,
DOCUMENTS IN SHAREPOINT**

**ADVANCED EMAIL FEATURES AND
A COMBINATION OF APPS**

OFFICE 365 LABELS

02

Using a combination of Microsoft apps and features

EMAILS STORED IN EXCHANGE, DOCUMENTS IN SHAREPOINT

Keep emails in Exchange and documents in OneDrive and/or SharePoint

In this scenario, emails are stored in Exchange via Outlook, while documents are stored in SharePoint or OneDrive. Exchange and Outlook are tools that end users are already familiar with and in which your business has already invested.

However, when emails are saved in one location and documents in another, important records are siloed away in personal inboxes. This presents serious issues for compliance.



PROS

- 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

- 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

02

Using a combination of Microsoft apps and features

ADVANCED EMAIL FEATURES AND A COMBINATION OF APPS

Use advanced email features like Group mailboxes and a combination of Teams, OneDrive, and SharePoint for documents

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.

Using Microsoft Teams, you can store files shared by a group as Teams documents. These are stored in SharePoint, but typically accessible mostly from the Teams browser interface. Although popular, Microsoft Teams is not an enterprise-grade document management offering. Documents are unclassified (i.e. there's no metadata available) and can easily become lost in long streams of communications.

PROS

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

CONS

- No classification for emails, rendering it almost impossible to find related emails and documents
- Not enterprise-grade. For instance, 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 without metadata



02

Using a combination of Microsoft apps and features

OFFICE 365 LABELS

Use Office 365 Labels

Office 365 Labels can be used to automatically classify content as a record. Labels help organizations identify content that requires additional action. Labels allow you to pre-configure rules and automatically carry out the correct actions. This can be applied to Exchange, SharePoint, OneDrive, and Groups.

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 problematic situation where some users are correctly applying the right labels, but others are not.



PROS

- Office 365 Labels give organizations the ability to pre-configure what happens to emails. This 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

- 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
- E3 license required for manual labels; E5 license required for automated labels

03

SHAREPOINT AS A CENTRAL REPOSITORY FOR BOTH EMAIL AND DOCUMENTS

This leaves us with the final – and only viable – option: using SharePoint as a central repository for both emails and documents.

With this option, users capture important emails and documents to SharePoint. As such, both emails and documents of records are 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.



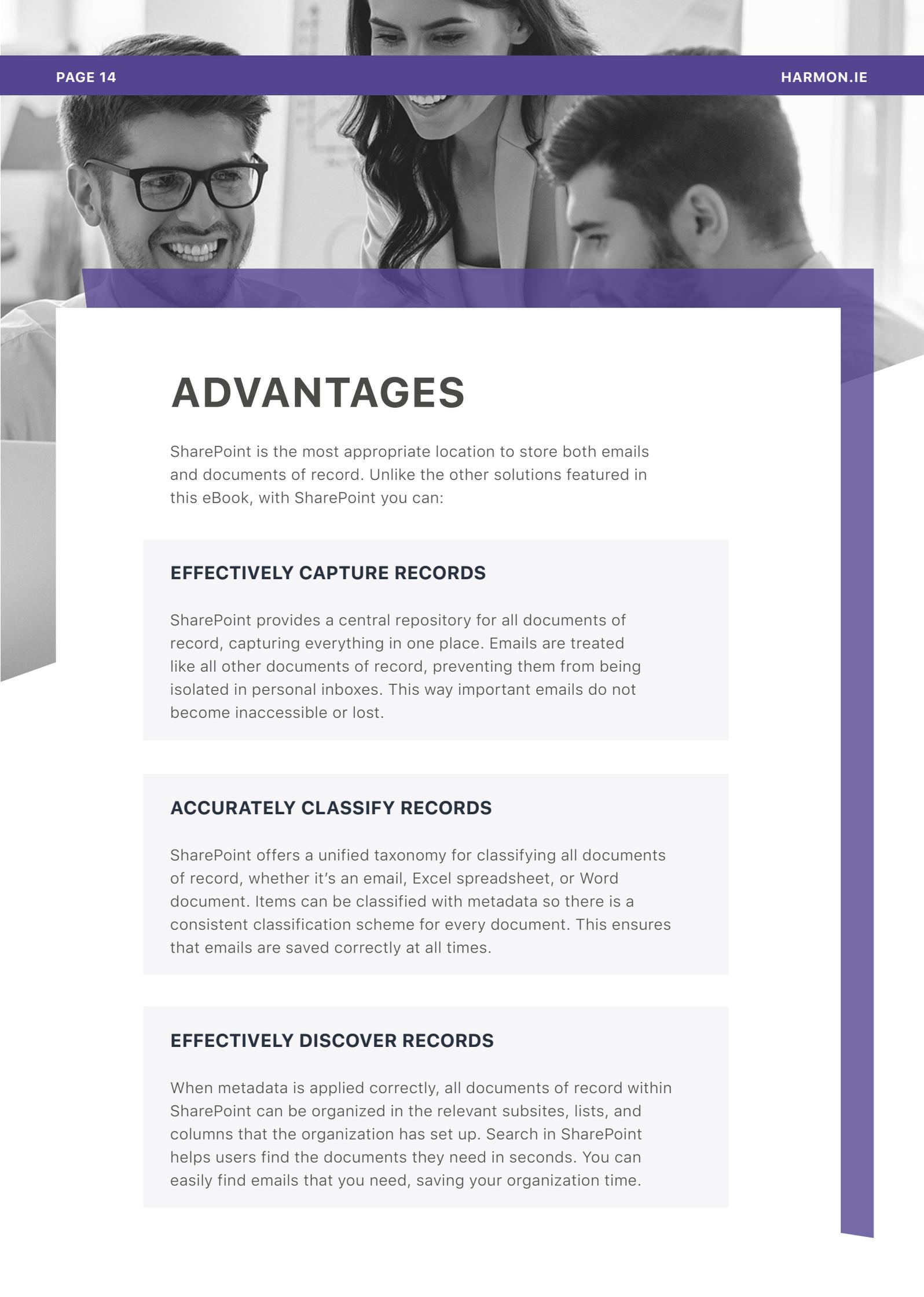
PROS

This approach employs one centralized repository. Emails are accessible to employees alongside other documents of record, which is great for productivity, collaboration, and compliance.

- All records are stored in SharePoint and can be accessed from a single interface
- Content is stored in locations 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
- Vast saving on email storage requirements since important emails (and attachments) are stored to SharePoint
- Eliminates 'document chaos' by storing the latest version of a document/email in a centralized location; accessible to all.

CONS

- Manual upload and application of metadata for emails is required



ADVANTAGES

SharePoint is the most appropriate location to store both emails and documents of record. Unlike the other solutions featured in this eBook, with SharePoint you can:

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. This way important emails do not become inaccessible or lost.

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. This ensures that emails are saved correctly at all times.

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. You can easily find emails that you need, saving your organization time.



THE FINAL PIECE OF THE PUZZLE... THE LAST MILE

The only thing missing when using SharePoint to store emails and documents is the user experience.

The problem is that many people find it challenging to 'use SharePoint as directed' to capture emails and documents consistently. The result is that email management initiatives fail. To make emails discoverable, SharePoint requires manual upload and manual application of metadata - organizations need to know how to solve this.

Fixing this is the final step in solving the email management problem.

YOUR APPROACH FOR BETTER EMAIL MANAGEMENT IN SHAREPOINT

In the next eBook in this series, we outline exactly what organizations need to do to help make email management work in SharePoint.

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