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Things to Consider when Choosing the Perfect Email Apps for SharePoint and Office 365

A Third-Party Software Buyer's Guide

You're on top of your organization's knowledge and records management needs. But the landscape is changing, particularly as Office 365 reinvents where, when and how people work. As you look for a streamlined email capture solution that's easy to support and manage, while reducing legal risk and increasing discoverability, you need to understand your options.

Integrating your SharePoint central repository with email systems—across desktops, laptops and mobile devices—is critical to successful knowledge and records management.

Emails and attachments are corporate records and knowledge. Ensuring that critical content doesn't get stranded in inboxes starts by deeply integrating email and SharePoint into easy to use experiences for your workers.

You're ready to unify email and enterprise records, because you know it's the best way to deal with some scary trends. According to Osterman Research:

- 97% of organizations report that email is used as a file transfer system,
- one in four emails contains an attachment, and
- 98% of bits that flow through emails systems are files being shared!

You need workers to file email into to a central repository, with the right metadata properties applied. It's got to be simple, or they won't do it.

With third-party solutions, email can be saved easily into in SharePoint from any device. Attachments are shared as links so content remains secure in SharePoint, reducing duplication and confusion over which version to view. SharePoint content is conveniently accessed from any Outlook interface–desktop, Office 365 on the web, or native apps on mobile devices. Productivity increases, with anywhere access to document libraries, while SharePoint utilization surges.

You CAN balance the need for information workers to be productive with the requirements to maintain control of your organization's critical information assets (including email and attachments), to prevent data breaches, optimize governance, and to minimize legal and regulatory compliance risks. The benefits of integration will make everyone's work easier.

Yet, not all options for integrating email systems with SharePoint are made equal. Whether you're building your own customized solution in-house or evaluating third-party tools, this guide outlines 10 key considerations for selecting a solution that will be sure to meet the email and SharePoint integration requirements of your IT department, RIM practitioners, and employees.

1 Viewing SharePoint Content

Getting workers to embrace SharePoint as their central repository for records and knowledge management begins and ends with ease-of-use. The first step is providing the ability to view SharePoint content within their email systems, where employees already spend their days. If the experience makes their work easier, they will love SharePoint, productivity will soar, and emails and attachments will be better managed. Employees save time when they can instantly see a SharePoint Library within Outlook or Office 365 on any device, and then find necessary files from within their email viewer without having to navigate to a browser.

Look for a solution that will allow your workers to easily browse and access the SharePoint libraries and content they need from their email system. Select a solution that allows them to productively:

- Access SharePoint libraries from Outlook or Office 365 on desktops, tablets or smartphones

- View all common file types—Office documents, PDFs, images and emails—stored in SharePoint directly in the Outlook preview pane

- View email and attachment properties including SharePoint metadata without having to switch views

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Filing Emails & Attachments

If you expect workers to capture emails, attachments, and metadata into a central SharePoint repository, your key to success is making it simple. That means simple and familiar user experiences across all the ways they can access Outlook: desktop, web browser or native apps on mobile devices. Employees are delighted with tricks that automate email management, like "Send & File" options that save files to Outlook folders synchronized to SharePoint. By exceeding their expectations for ease-of-use, the enterprise is rewarded with high user adoption and reduced likelihood of risky employee workarounds.

Look for a solution that allows your workers to swiftly:

- File emails and attachments to SharePoint on any mobile device with Office 365

- Drag and drop emails and attachments to SharePoint within Outlook, online and offline

- Automatically file sent emails to SharePoint using "Send & File"

- File to recently used locations or history, and create favorites for quick access to SharePoint folders

- Prevent duplication with conflict resolution and automated smart file naming

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Tagging & Finding Emails

Finding and retrieving content quickly starts with applying the right metadata properties. Making the metadata tagging process as effortless as possible will drive discoverability in SharePoint. Third-party solutions automatically extract email properties when saving new emails and attachments to SharePoint. And employees can easily add custom tags using drop-down menus, pick lists and type-ahead options. Support for managed metadata and default folder metadata are also key to an effective email records management strategy. Effective content tagging in turn drives efficient search, productivity and facilitates eDiscovery.

Look for a solution with advanced metadata support that will allow workers to:

- Automatically capture common email properties including "To", "From", "Subject" and "Send Date"

- Apply additional custom/SharePoint metadata, including enterprise-managed metadata like taxonomies and keywords

- Categorize email and attachment types to comply with retention policies and regulatory requirements

- Tag email and attachments individually or in bulk for multiple file uploads

- Use keywords or email metatags to search for emails and attachments stored within SharePoint

- Open emails and documents saved in SharePoint directly from the Outlook search result panel

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Sharing Content as Links

SharePoint is a powerful collaboration and content management platform. Still, users find it easier to share files as email attachments today—resulting in content duplication, loss, dispersion, versioning issues and general chaos.

The solution? Information workers live in email. Make it easy for them to share SharePoint files as links within their email systems. All team members then have access to the latest version of SharePoint content, right from an email link.

Look for a solution that enables users to stay in their email system to easily:

- Email attachments from SharePoint as links to prevent duplication
- Share SharePoint documents within Outlook or Office 365 interfaces with a fast access to "Send as Link" or "Send as Attachment"
- Copy and paste SharePoint links into other documents

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Supporting and Securing BYOD

Information workers today want to use their own devices. They want to stay connected to work but don't want to carry a separate business device.

To reduce mobility costs and boost anytime productivity, most enterprises are starting to embrace Office 365 and allowing employees to connect personal devices to corporate email. Doing so introduces new risks of corporate content escaping IT visibility and management.

Workers also want to share content and collaborate with their team from their own mobile devices. Saving an email directly to SharePoint from a mobile device is simply not supported by any out-of-the-box Microsoft solution.

Third-party solutions extend SharePoint records management capabilities across devices to better manage email anytime, anywhere. SharePoint libraries are synchronized across desktops, laptops and mobile devices. Employees can save emails and attachments to libraries, using Outlook or Office 365 on any device, thereby keeping enterprise email and content within the grasp of IT. Workers stay productive and connected to all critical enterprise content, both email and documents, while IT retains oversight and control.

Look for a solution that allows workers to:

- Integrate SharePoint into their mobile devices for anytime, anywhere access to critical email, documents and metadata
- Securely access business email on their own mobile devices using Office 365, to ensure that corporate content stays within sanctioned, secure applications
- Have SharePoint libraries and content pushed to their devices centrally, to make configuration and deployment secure and effortless

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Working on the Road

With most emails today being read on smartphones, workers shouldn't have to compromise productivity trying to navigate different mobile app/browser views to access and contribute information to SharePoint. Employees expect the same, familiar experience for capturing and sharing content across devices, whether they are on-the-go or in the office.

For instance, a sales executive in transit wants to save a customer email to SharePoint from his iPhone. A professional consultant is onsite at a client engagement and needs to use his Android phone to send critical documents stored in SharePoint to the client. A project manager on the road wants to save an email change order request to SharePoint with the right tags so that his team can find the information easily.

In the office or on the road, the name of the game is a consistent user experience. Third-party solutions that seamlessly integrate with Office 365 deployments allow workers to navigate the same familiar interface on any device, including add-ins for native mobile Outlook apps on Android and iOS.

Look for a solution that allows remote and mobile workers to:

- Save and tag emails or attachments to SharePoint within email systems on any mobile device
- Have the same familiar and easy user experience across devices to remove barriers to user adoption
- Share content stored in SharePoint via email directly from their mobile devices to facilitate collaboration anytime, anywhere

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Editing SharePoint Content

In a collaborative work environment, sharing and editing enterprise content can become complex if there are multiple versions dispersed across inboxes and devices. A third-party solution for integrating SharePoint with Outlook provides access to one single source of truth.

Documents can be previewed and accessed from within Outlook, online or offline, and changes saved back into SharePoint. Important documents are never attached to emails that are lost in personal .PST files.

Look for a solution that enables users to easily:

- Access and open files in native apps (i.e. Word, Excel) from SharePoint within Outlook, make changes, and save them to SharePoint

- Automatically keep content up-to-date at all times

- Add new files to SharePoint sites and folders created from within Outlook

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Configuring User Settings Centrally

If employees are burdened with configuration tasks that stand in their way, the success of any new email integration solution will be limited. Third-party solutions allow IT or business managers to easily and securely configure and push out SharePoint locations and document libraries to employees on desktops, laptops and mobile devices in a single stroke, with zero user interaction. With instant, friendly access to SharePoint within Outlook folders and Office 365 on mobile devices, employees quickly adopt the third-party solution and SharePoint.

Look for a solution that will empower the IT organization to swiftly:

- Configure and onboard users and user groups from a central console
- Centrally deploy SharePoint locations and policies to all users and/or user groups

9 Reporting, Analytics and Compliance

Keeping enterprise content secure starts with understanding who is using what information and how. Third-party solutions meet the needs for corporate governance by tracking user activity. Logs and dashboards provide practical analytics and reporting tools to help make informed decisions that reduce risk and deliver value to business process owners.

Look for a solution that will empower IT or business unit managers to:

- Track and access user activity logs centrally
- Track email records management activities, to monitor the number of emails stored by platform, device, location, user/group and time period
- Create reports to monitor compliance, engagement and security
- Leverage auditable analytics to support compliance with regulations such as GDPR

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Security & Integrating with Existing Infrastructure

If your organization is a Microsoft shop, you've invested in SharePoint, Outlook and Exchange—the leading platforms for enterprise content management and email communication—and you are probably making the move to Office 365. Integrating these systems instantly increases the amount of content managed in SharePoint—keeping that content secure and away from unsanctioned apps and cloud systems, while increasing the return on your existing investments. The best way to stop employees from sending attachments via email to team members or to personal email address for mobile access is to make it easier to be productive by integrating email and SharePoint.

When choosing a third-party solution that synchronizes enterprise content across devices, you also want to rest assured that corporate data is well protected with an enterprise-grade platform. Look for a solution that keeps content secure and encrypted according to the highest industry standards. And, look for a vendor that partners with leading MDM vendors for additional levels of security.

Look for an email management solution that:

- Syncs content at the device level, so data is not moved to a content hub to avoid duplication and unnecessary security risk
- Supports single sign-on, Windows authentication and ADFS
- Supports SharePoint 2010, 2013, 2016 and Office 365

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Choose a Trusted 3rd Party Solution

With 10 years of SharePoint-centric expertise, Colligo is a leading global provider of collaborative apps for the digital workplace, extending Microsoft SharePoint, Office 365, and OneDrive for Business with a focus on achieving 100% user adoption. Colligo is a Microsoft Gold Application Development Partner and Microsoft Silver Cloud Platform Partner, with Global 500 customers including four of the top five global oil and gas companies, and serving multiple government agencies around the world.

"Colligo was the missing link in providing our client with an end-to-end electronic records and information management solution. With it, we delivered! Colligo solves the problem of classifying and properly managing case-based emails while increasing user adoption. My client was extremely happy with the solution because it got the job done and was easily adopted by the end users."

Amina Elgouacem
President and CEO
NEOSTEK

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Two great email solutions for records and knowledge management.

Discover seamless SharePoint integration for Outlook on PC or Mac.

Colligo Email Manager for Outlook is the solution of choice for getting emails and attachments out of inboxes and into the right place with the right tags. Thousands of organizations, including Microsoft, have chosen this app for managing emails in SharePoint.

This app brings SharePoint / Office 365 / OneDrive for Business sites to where your users spend their days–Outlook–boosting productivity while keeping your content secure.

Mobilize email capture in Office 365 from any device.

Colligo Email Manager for Office 365 enables capturing email records into SharePoint from anywhere. It works where employees work. Emails and associated metadata (including To, From, Date, or custom fields) are captured using any version of Outlook, including desktop, mobile or web. Now workers can capture emails for record or knowledge management from any device.

SharePoint content can be searched and shared as links to respond on-the-go to colleagues who need information, boosting collaboration.

A mobile email and content management platform, Colligo Engage includes apps that delight users while cloud-based management controls meet the security and governance needs of even the most regulated organizations.

Management & Analytics in the Cloud

Productivity Apps on Every Device

Connectivity & Control of Multiple Repositories

For more information, or to request a consultative call, please visit **www.colligo.com**