

## The Email to SharePoint Connector



01

**Emails and Attachments**  
(Records)

### Increase Compliance, Realize Time & Cost Savings

Storing emails and attachments in a centralized repository like SharePoint Online instead of leaving them in Outlook:

- Is critical for records management, governance & compliance
- Strengthens knowledge management and collaboration
- Drives user adoption of SharePoint, further leveraging your investment in Microsoft 365
- Ensures the right content is available, tagged, and governed—so AI tools are effective



02

**Tagging, Labelling & Automation**

### Save Emails to SharePoint from Within Outlook

- Quickly and easily file emails and attachments to SharePoint Online without leaving Outlook
- Empower users to save and auto-apply metadata and retention labels to emails compliantly. No app-switching necessary
- Auto-file emails on a recurring basis
- Get your email content AI-ready — tagged, discoverable and safe for consumption by AI tools



03

**SharePoint**  
(Adhering to RM Policy)

### Search and Share Emails from SharePoint

- Quickly search across SharePoint right from Outlook for opening or sending files with ease
- Email SharePoint content as links for easy collaboration and file-sharing with team members
- View an AI Summary of an email in SharePoint without opening it
- Ensure AI-tools can search and surface only permissible content

## Filing

- File emails to SharePoint Online, Teams, and OneDrive
- Automatically file emails and attachments on a recurring basis
- File singular emails with one-click filing or automatically in bulk (batches)
- Generate AI Summary of email as an additional metadata field
- Quick-file to pinned or recommended locations
- Smart conflict resolution to prevent duplicate names for emails and attachments
- Send and save: file an email to SharePoint as it is sent

## Classification

- Automatically extract email metadata and/or manually capture custom fields
- Ability to hide non-required fields when tagging metadata
- Support for customized and managed metadata (taxonomies and keywords) and person/group metadata

## View

- Browse SharePoint, Teams, and OneDrive
- View AI Summary of emails in SharePoint

## Search

- Search SharePoint, Teams, and OneDrive for files or folders
- Search email content using AI Summary

## Share

- Email SharePoint content as attachments in an email
- Email attachments from SharePoint as links to prevent multiple copies of the same content

## Central Administration

- Centralized and simplified deployment via the Microsoft 365 add-in framework
- Admin capabilities to push sites, policies and streams (libraries) to users

## Authentication

- Supports Microsoft Azure AD Cloud Authentication (standard login to Microsoft 365) including multi-factor authentication

## System Compatibility

- Microsoft 365, Azure AD (Entra)
- Outlook desktop for Mac or Windows (both Classic and New Outlook), Outlook Online or Outlook App on mobile devices
- SharePoint Online

## Language

- English and French

## Multi-cloud/Platform

- SharePoint Online, Teams and OneDrive