

Is SharePoint the Right Solution for Email Management?



Richard Poole – CTO, EMEA

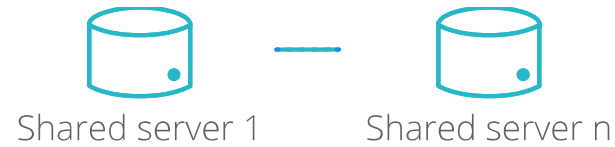


What Information Do You Need to Save?

Email 80%

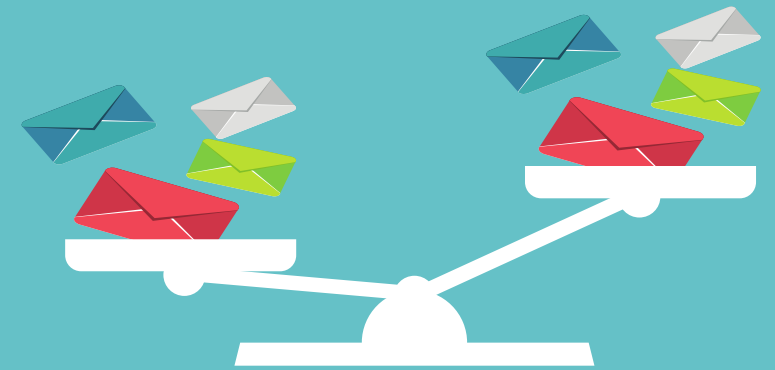
Files 15%

Workflow 5%



“All Emails are Equal, But Some Emails Are More Equal Than Others”

- Contracts
- Proposals
- Client correspondence (professional services)
- Formal reviews
- Deeds (state and local government)
- Building Plans (construction, utilities, oil & gas, energy)
- Maintenance schedules/plans (construction, utilities, oil & gas, energy)



**ROUGHLY 5%
OF EMAILS
ARE RECORDS***

Poll: Have you had instances where lost emails have cost you?

- a. Time
- b. Money
- c. Loss of business

The Anatomy of Email Management



Poll: How do your users currently manage important emails?

- a. Personal mailboxes and PST files
- b. Shared mailboxes
- c. Public folders
- d. SharePoint
- e. Another document management system

Microsoft-based Email Management

Know Your Options





Emails in Exchange



Documents in SharePoint

Drag Your Favorite Folders Here

anniet@ravenwood-corp.com

Inbox 5

- Demo
- Drafts [27]
- Sent Items
- Deleted Items 122
- Archive
- Clutter 694
- Collage
- Conversation History
- harmon.ie 54
- Junk Email
- Outbox
- RSS Feeds
- webinar
- Search Folders

Groups

- Private Group
- group
- Project
- d Attachments Group
- More...

Search Current Mailbox

Current Mailbox

Focused Other

By Date

Other: New messages (2)
Ashley, from harmon.ie

Last Month

Harmon Young
OneDrive example
Driving Change.pptx
12/11/2018

Older

Harmon Young
Please review
SharePoint document links:
11/26/2018

Maya Bickson
Topics demo urls
From: Yaarit David <yaaritd@harmon.ie>
11/13/2018

Harmon Young
Crown Project
From: Ron Johnsen <ronj@harmon.ie>
11/7/2018

Maya Bickson
collage url
https://demo.colla.ge/static/index.html?mode=browser
11/6/2018

Harmon Young
Please review
SharePoint document links:
11/2/2018

Harmon Young
Overhead image
SharePoint document links:
10/29/2018

Harmon Young
Please review
AGRICULTURAL LEAS4.docx
10/29/2018

Emails in Exchange

Home

BP Bird Protection Team Site

Search

+ New Upload Quick edit Sync Export to Excel Flow

Home

Documents

Site contents

Marketing Campaigns

Recycle bin

Edit

Documents

Name	Modified	Modified By
Wash Reserve Board Emails	December 25, 2018	Admin Account
A World Richer in Nature.xlsx	December 25, 2018	Admin Account
Albatross.docx	January 1	Fred Neal
Archaeological Study.docx	December 25, 2018	Admin Account
Audience Profiling.xlsx	January 2	Fred Neal
Avocets and stilts overview.docx	January 1	Fred Neal
Banner Ad - Visitor Experience....	January 2	Fred Neal
Birds without Borders Infograph...	January 2	Fred Neal
Conjura Attribution Modeling P...	December 25, 2018	Admin Account
Contract Template.docx	December 25, 2018	Admin Account
Data analysis.xlsx	December 25, 2018	Admin Account

Return to classic SharePoint

Documents in SharePoint



Emails in Exchange



Documents in SharePoint

Pros



- No need for user training
- Use Outlook rules to automatically archive emails
- With Office 365 Content Search eDiscovery tool, one search works for emails and documents

Cons



- Content is stored in multiple places; complex discovery
- No classification for emails makes them hard to find
- Mailbox size
- Emails not visible to colleagues and auditors
- What about attachments?



Group Email Mailboxes / Public Folders



Documents in Teams

The screenshot shows the Outlook interface with the 'Tech Sales' group mailbox selected. The left sidebar shows 'Favorites' with 'Tech Sales 3' highlighted. The main pane displays a list of comments on tasks, including:

- Ram Tagher: Comments on task "OWA Save multiple emails [Hilton]" (26/11/2018)
- Guy Cohen: Comments on task "Site Blocking - should block before trying to connect" (13/11/2018)
- Guy Cohen: Comments on task "Improve O365 site connectivity without needing to push reg settings" (17/10/2018)
- Ram Tagher; Ron Johnsen; Guy Cohen: Comments on task "US Govt Community Cloud support" (07/10/2018)
- Ram Tagher; Richard Poole; Guy Cohen: Comments on task "Include ExcludeLibraryByNameFilter in standard package" (07/10/2018)
- Richard Poole: Sales Review (03/10/2018)
- Guy Cohen: Comments on task "Verify how/if filter by custom date ranges is supported by SP" (25/09/2018)
- Guy Cohen: Comments on task "Test out new folder for within the Teams calendar" (16/09/2018)

A blue callout box in the bottom left corner contains the text: **Group Email Mailboxes**

The screenshot shows the Microsoft Teams interface for the 'Logjam Tours' team, specifically the 'General' channel. The left sidebar shows the 'Files' tab selected. The main pane displays a list of documents:

Type	Name	Modified	Modified by
Image	topic board.jpg	10/23/18	David Lavenda
Document	harmon.ie 2018 information overload ...	10/23/18	David Lavenda

A blue callout box in the bottom left corner contains the text: **Documents in Teams**



Emails in Exchange



Documents in SharePoint

Pros



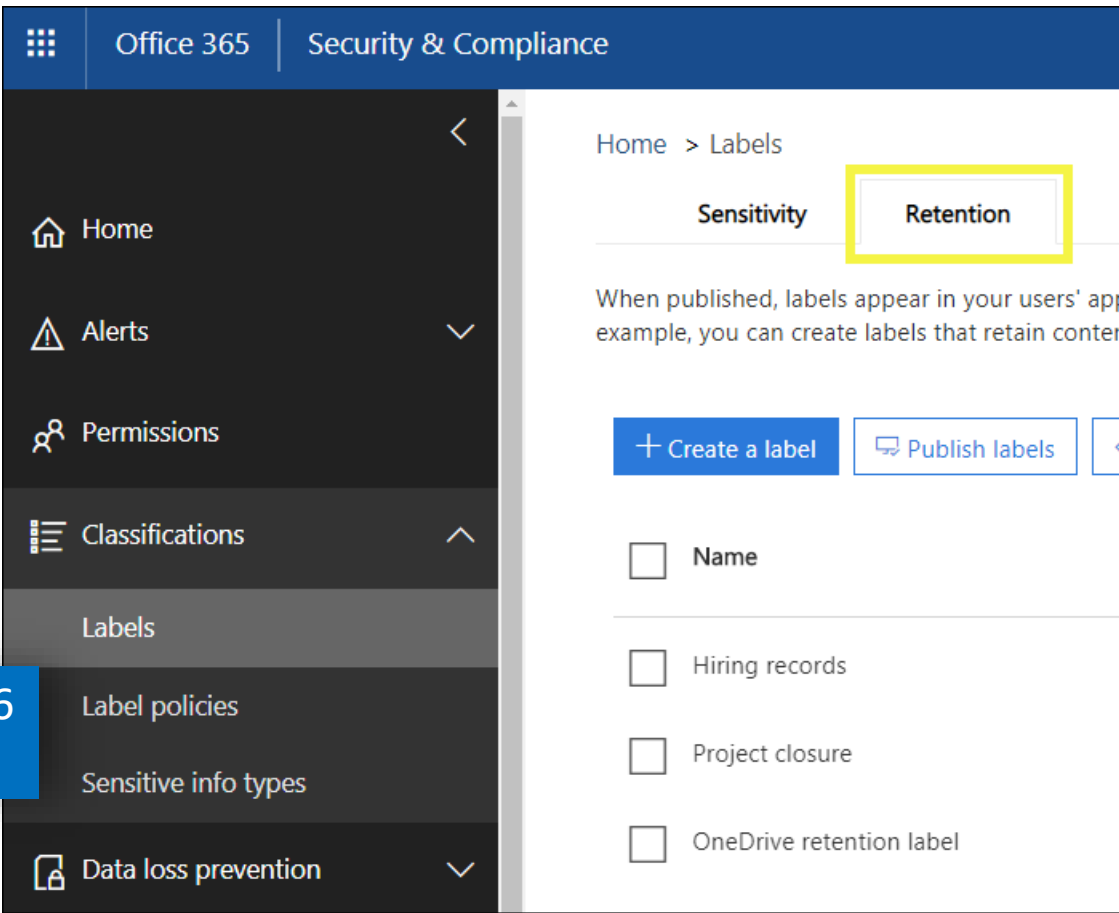
- Emails are visible to colleagues/auditors
- Easy to set up Groups/Teams to get started
- With Office 365 Content Search eDiscovery tool, one search works for emails and documents

Cons



- Content is stored in multiple places; complex discovery
- No classification for emails makes them hard to find
- Users need to manually move emails
- Team documents get stored with no metadata
- What about attachments?

Office 365 Labels



The screenshot shows the Office 365 Security & Compliance interface. The left-hand navigation pane includes: Home, Alerts, Permissions, Classifications, Labels, Label policies, Sensitive info types, and Data loss prevention. The main content area is titled 'Home > Labels' and features two tabs: 'Sensitivity' and 'Retention', with the 'Retention' tab highlighted by a yellow box. Below the tabs, there is a descriptive paragraph: 'When published, labels appear in your users' app... example, you can create labels that retain conten...'. At the bottom of the main area, there are three buttons: '+ Create a label', 'Publish labels', and a partially visible button on the right. Below these buttons is a list of checkboxes for label types: Name, Hiring records, Project closure, and OneDrive retention label.

Office 356 Labels



Office 365 Labels

Pros



- Retention policies can be added to labels
- Consistent labels can be applied to emails and documents

Cons



- Limited classification
- Policy management is complex
- Emails and documents are stored in separate repositories
- Labels need to be applied to each type of content separately in Exchange, OneDrive, etc.
- Automatic labeling can take up to 7 days to be applied
- Only available through E5 licensing

Emails



Documents in SharePoint

Office 365 | SharePoint

Home
BP Bird Protection Team Site

Search

+ New | Upload | Quick edit | Sync | Export to Excel | Flow | ...

Property Renewal Options (2).xlsx	December 25, 2018	Admin Account	
Property Renewal Options.xlsx	January 2	Fred Neal	Marketing Budget
Re Budget for the Digital Workp...	4 days ago	Fred Neal	
Re Budget for the Digital Workp...	4 days ago	Fred Neal	
Re Budget for the Digital Workp...	4 days ago	Fred Neal	
Re Budget for the Digital Workp...	4 days ago	Fred Neal	
Re Budget for the Digital Workp...	4 days ago	Fred Neal	
Re IT Requirements for Fundrais...	January 2	Fred Neal	
Re Marketing Budget template...	4 days ago	Fred Neal	
Reserve Aerial Photos.jpg	January 6	Fred Neal	Marketing Budget
Reserve Extension Plan.docx	January 2	Fred Neal	Marketing Budget
Reserve Strategy.docx	January 6	Fred Neal	Marketing Budget
Review this RFE from Kronos.msg	January 1	Fred Neal	
Saving Nature Infographic.pdf	January 6	Fred Neal	Marketing Budget

Emails

Documents

Emails



Documents in SharePoint

Pros



- Single repository for all important information
- Single interface for all important information
- Makes of built-in permission model
- Uniform metadata for emails and documents
- eDiscovery captures all important information with single procedure

Cons



- Additional step needed to upload email messages to SharePoint

Poll: Are you planning to use any of the following Microsoft capabilities?

- a. Teams
- b. Labels
- c. Group mailboxes
- d. None of the above

Recommendation

Do you need to find emails
and documents
later?

YES

Single
repository

Uniform
metadata

NO

Emails
Exchange

Office 365
Labels



Recommendation

For an email management initiative to be successful, the business user experience needs to be in **focus**



Would you like to be contacted by a harmon.ie representative?

1. Yes, I'm an existing customer
2. Yes, I'd like to trial harmon.ie
3. Yes, I have some questions
4. No, thanks