

A blurred background image showing a person in a blue shirt holding a tablet, with a laptop visible in the foreground.

10

Things to Consider when Choosing the Perfect Email Apps for SharePoint

A Third-Party Software Buyer's Guide

Good for you! You're reading this guide because you already know that integrating SharePoint, Office 365 and OneDrive for Business with email systems – across desktops, laptops and mobile devices – is critical to the success of your enterprise!

Email is a corporate record. Attachments are corporate records. Ensuring that content doesn't escape the enterprise via email starts by deeply integrating email and SharePoint into a "single pane of glass."

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

- 97% of organizations report that email has become the defacto file transfer system,
- one in four emails contains an attachment, and
- 98% of bits that flow through emails systems are files being shared!

With third-party solutions, email is easily saved in SharePoint. Attachments are shared as links so content remains secure in SharePoint, reducing content duplication. SharePoint content is conveniently accessed, online and offline, within email systems. Productivity increases, with anywhere access to enterprise content, while SharePoint utilization surges.

You CAN balance the need for information workers to be productive with the requirement 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 you a hero.

Yet, not all options for integrating email systems with SharePoint or Office 365 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 both your IT department and employees.

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Viewing SharePoint Content

Getting information workers to successfully adopt SharePoint as their primary email and document management solution starts 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 will be better managed. Employees save time when they can instantly see a SharePoint Library within Outlook and across their mobile devices, and then find and open files from within their email system without having to navigate to a browser.

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

- Access SharePoint/Office 365 content from email systems on desktops, tablets or smartphones
- View all common file types –Office documents, PDFs, images and emails – stored in SharePoint and Office 365 directly in the Outlook preview pane or mobile app
- View email and attachment properties including SharePoint metadata across devices



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Filing Emails & Attachments

If you expect information workers to save emails and attachments to SharePoint, your key to success is making it simple. That means an easy drag-and-drop experience within Outlook or a simple swipe 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, the enterprise is rewarded with higher and higher volumes of corporate content – both email and documents – stored in SharePoint.

Look for a solution that allows your information workers to swiftly:

- “Swipe & save” emails and attachments to SharePoint on mobile devices while connected or even offline with automatic upload when back online
- Drag and drop emails and attachments to SharePoint and Office 365 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 automated smart file naming



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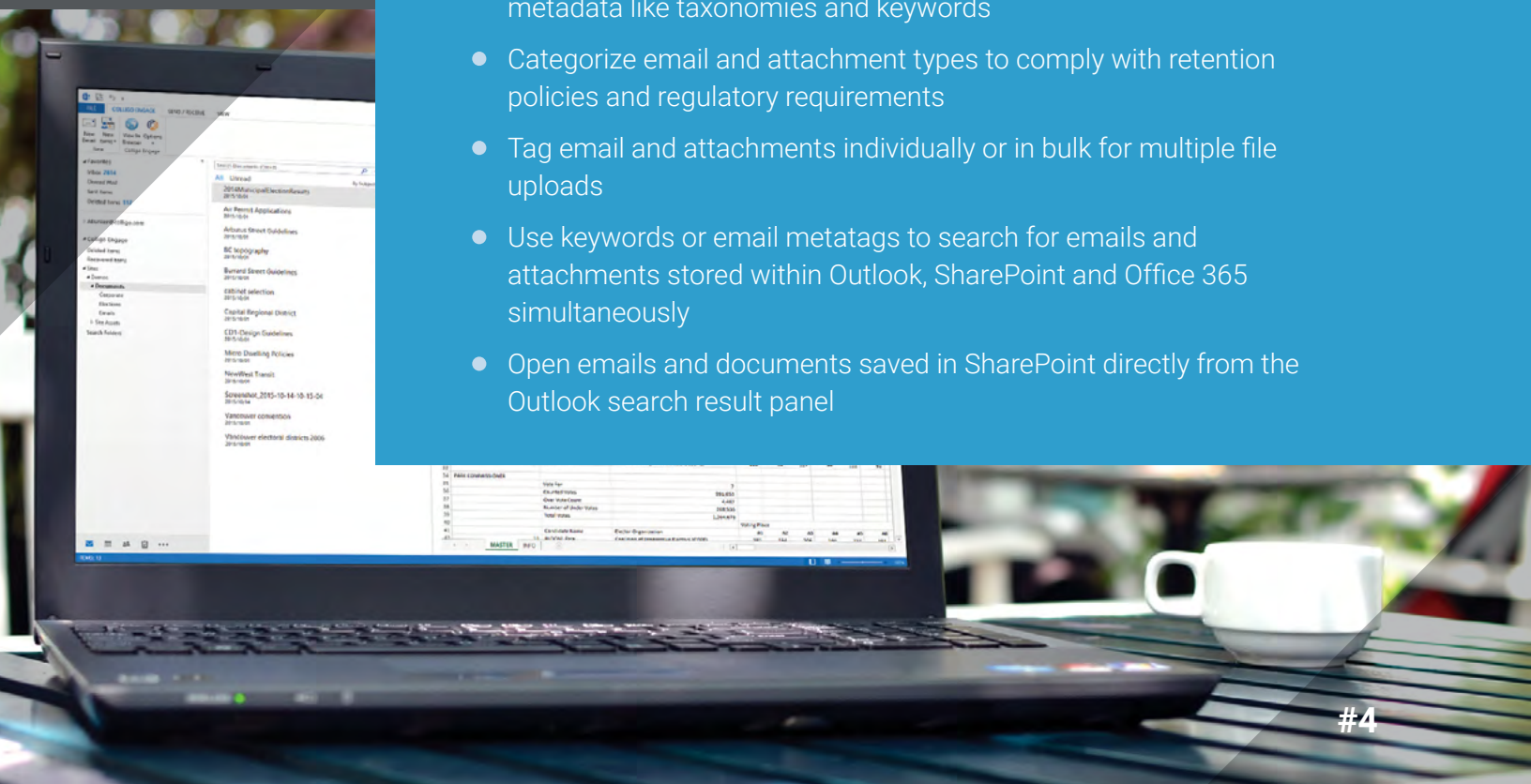
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Tagging & Finding Emails

Finding information quickly starts with metadata. Making the tagging process as effortless as possible is what drives findability in SharePoint. Third-party solutions automatically extract email properties. When saving new files to SharePoint, employees can easily tag enterprise content using drop-down menus, pick lists and type-ahead options. Support for enterprise managed metadata (EMM) 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 information workers to:

- Automatically capture common email properties including "To", "From", "Subject" and "Send Date"
- Apply additional 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 Outlook, SharePoint and Office 365 simultaneously
- Open emails and documents saved in SharePoint directly from the Outlook search result panel



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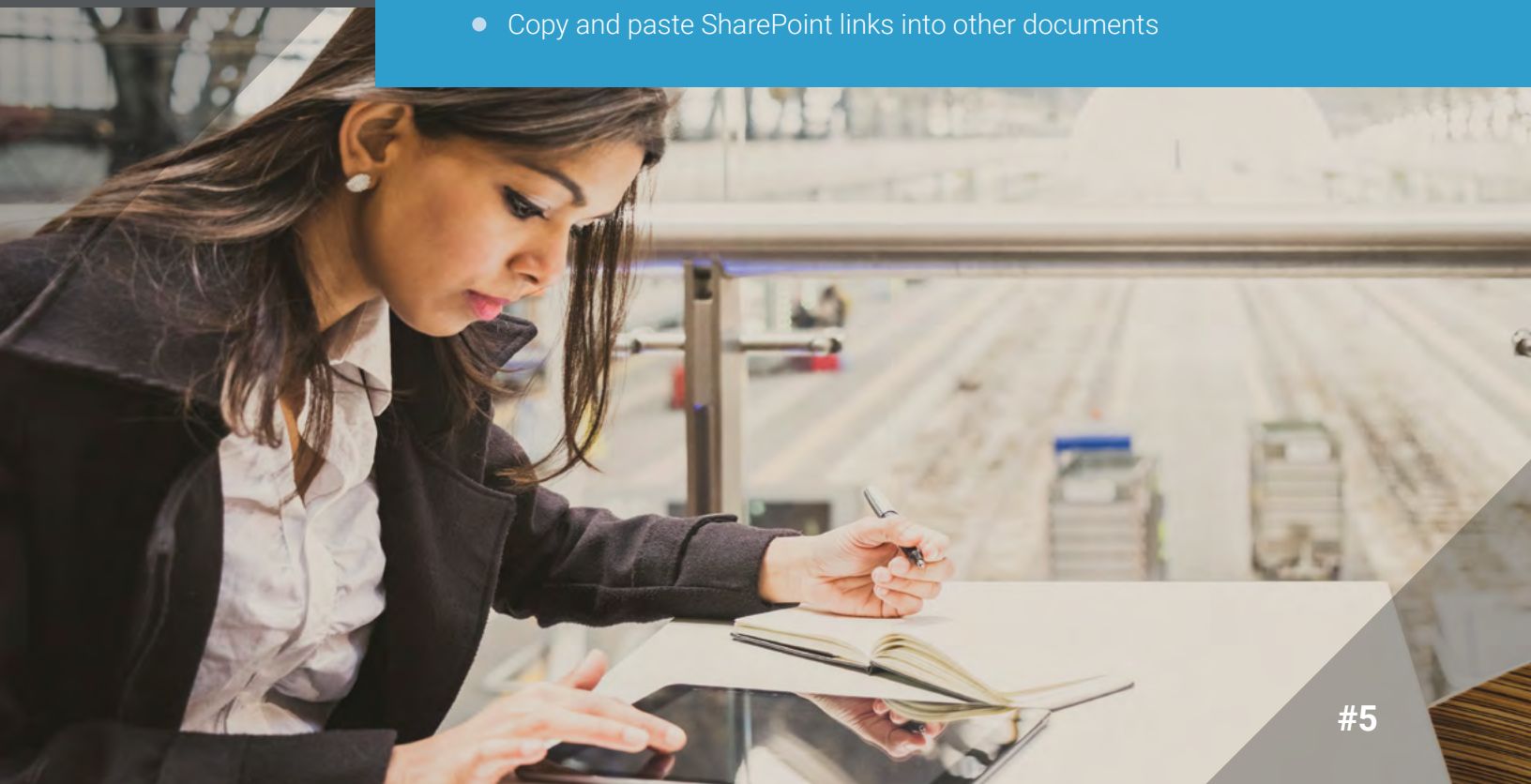
Sharing Content as Links

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 easiest to share SharePoint files as links within their email systems. All team members then have access to the latest version of SharePoint documents, right from an email link, within Outlook or on their mobile devices.

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 the search results panel with a fast right-click to “Send as Link” or “Send as Attachment”
- Copy and paste SharePoint links into other documents



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Supporting Multiple Devices

Information workers today want to use their own mobile 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 allow employees to connect personal devices to corporate email. Doing so blurs the line between personal and business communication - this commingling introduces risk with corporate content escaping IT control.

Mobile workers also want to access, edit and add enterprise content. Using a mobile web browser to access SharePoint has limitations. Finding, editing or saving a document can be a frustrating experience online and simply impossible offline. While Microsoft's OneDrive for Business app mobilizes content for offline access, it leaves important metadata behind.

Saving an email 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 and Office 365 content is synchronized across desktops, laptops and mobile devices. Employees can save emails and attachments to Libraries, using Outlook or mobile apps that keep 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 mobile workers to easily:

- Sync content from Exchange, SharePoint, Office 365 and OneDrive for Business across devices for access to the latest email, documents and metadata
- Separate personal from business email on mobile devices, to ensure that corporate content stays within sanctioned, secure applications
- Save incoming and outgoing emails (with attachments and metadata) to SharePoint from any device

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Working Offline

Information workers shouldn't have to compromise productivity to work with enterprise content and better manage their email. Yet, connectivity is sometimes slow and at times completely unavailable.

For instance, a sales executive wants to save a customer email to SharePoint from his iPhone while in flight. A professional consultant has unreliable WiFi access while onsite at a client engagement and needs to access critical emails and documents stored in SharePoint. A senior engineer wants to save a safety document received by email to SharePoint while working on an offshore oil rig.

In the office or on the road, connected or offline, the name of the game is speed. Smart synchronization empowers users of third-party solutions to interact with emails and documents while offline and gain instant access to the latest information when online, regardless of file sizes and connectivity strength. Emails filed offline to SharePoint are automatically synchronized when back online.

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

- Save and tag emails or attachments to SharePoint within email systems, even when offline
- Have instant access to emails, documents and metadata from SharePoint while offline
- Optionally set sync to manual, every 15 minutes, hour, day or every time an email system is opened
- Control which folders, views, libraries or sites are synced for offline access

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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/Office 365 with Exchange/Outlook provides access to one single source of truth.

The same content is synchronized across desktops, laptops, tablets and smart phones. Documents and metadata can be updated from any device and the changes are automatically synchronized in SharePoint/Office 365. Important documents are never attached to emails that are lost in personal .PST files.

Look for a solution that enables users to easily:

- Check files in and out for editing online, edit content offline, and automatically sync changes when online from Outlook or mobile devices
- Automatically detect and resolve conflicting changes, keeping content up-to-date at all times
- Edit metadata including managed metadata and enterprise keywords
- Add new files to SharePoint sites and folders created from within the app, online and offline



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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 to securely configure and push out SharePoint/Office 365 content to employees on desktops, laptops and mobile devices in a single stroke, with zero user interaction. With instant, friendly access to their SharePoint enterprise content within Outlook folders and within mobile email, employees quickly adopt the third-party solution.

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

- Configure and manage all apps and devices from a central console
- Centrally push out content and policies to all users and groups of users
- De-authorize devices or users, wiping content



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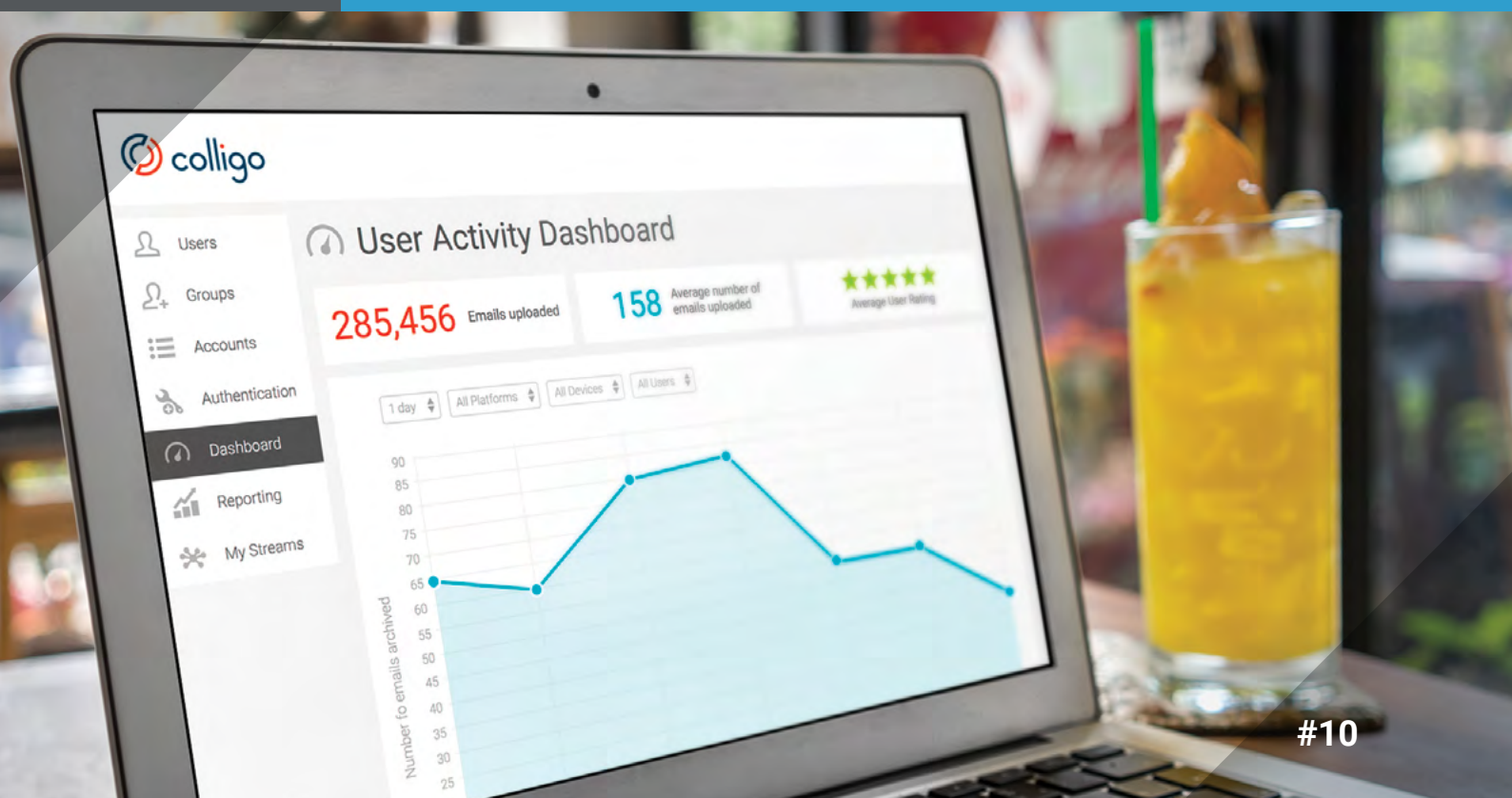
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Reporting & Analytics

Keeping enterprise content secure starts with understanding who is using what information and how. Third-party solutions meet the needs of the IT enterprise 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 pros 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



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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. Integrating these systems instantly increases the amount of content managed in SharePoint and Office 365 – 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 or offline 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

"One of the great benefits of Colligo Engage is that you can access your entire SharePoint repository from inside of Outlook. This is a very powerful capability for our attorneys who live in the world of Outlook. With Colligo, they can work on their email and collaborate on documents at the same time, all from within the Outlook interface. Dragging and dropping from the inbox to a folder is a very natural process for our staff and the preferred method of moving content from Outlook into SharePoint. There is no context shifting or need to change from one interface to another in order to access SharePoint. Colligo allowed customer-facing users to access files on the road, making it easy to stay up-to-date."

Nishan DeSilva

Director of Information Management & Corporate Records Compliance
Microsoft





Re-discover SharePoint inside Outlook to boost productivity!

Colligo Email Manager for Outlook is the solution of choice to get emails and attachments out of inboxes and into SharePoint. Thousands of organizations, including Microsoft, have chosen this app to manage email records. It brings SharePoint, Office 365 and OneDrive for Business sites to where your users spend their days – Outlook – boosting productivity while keeping content secure. Users can easily view, file, classify, search and share SharePoint content within Outlook.

Meet the world's only SharePoint email integration for iOS!

COMING SOON!

The Colligo Email Manager for iOS app is one of a kind. This enterprise email app connects users to their email and SharePoint, Office 365 and OneDrive for Business repositories into one pane of glass, even when offline. A simple swipe securely files emails and attachments in compliance with corporate policies. Email properties (like Subject, To, From) are automatically extracted and custom metadata can be applied.



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. The Colligo Console connects IT directly to devices to enable central configuration management and compliance monitoring. Content, user and device activity data is collected with Microsoft Azure, but all corporate content remains in securely place on enterprise systems.

Request a guided demo of Colligo Engage at www.colligo.com

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