# How to manage Emails in Project management with SharePoint

## This document is relevant for you if...

you are an IT professional or project manager in a company that uses Microsoft Outlook for e-mail and are looking for new ways to use e-mails in conjunction with documents, tasks and contacts for team or project work in one place.

In this White Paper, the *documentation of projects* is used as an *application example*. The references also apply to all other application scenarios where e-mails are to be managed together with Office documents and other information, e.g. case management in law firms.

## Summary

Project documents are often saved in e-mail and file systems. Consequently, cohesive project documentation is often only possible with considerable effort.

Due to its flexibility and document management functions, Microsoft SharePoint can also be used as a central storage location for all project data.
However, Microsoft has yet to create a suitable method of combining all relevant project documents:
There is a gap between e-mails and project-related files.

SOXS closes this gap between Outlook and SharePoint, thus enabling SharePoint to become *the* solution for central management of all project data.

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## The problem: E-mails and documents are managed in different systems

The problems associated with project documentation are currently determined by the following factors:

- A large proportion of project documentation is located in incoming and outgoing e-mails and their file attachments.
- E-mail management systems do not manage documents and file systems do not manage e-mails.
- The problem is compounded by the fact that e-mails, by their very nature, are aimed at *one* person and are made accessible for team or project work by being forwarded to the team.
- The result is disjointed and widely distributed filing systems with an uncontrollable multitude of copies and versions of the same documents.

Thus, the question for project managers is, how does one produce complete and cohesive project documentation in these circumstances?

> *The aim is to find a common platform for managing e-mails and documents.*

This White Paper examines a solution based on Outlook and SharePoint, and focuses on how e-mails can be transferred from Outlook to SharePoint.

## The foundations: Outlook and SharePoint

Nowadays, efficient e-mail and document management is an important requirement for employees in almost all companies. This still represents a huge challenge for many IT departments.
The requirements for an e-mail management solution are derived from the following business use cases:

- Supporting *collaboration* between employees through a common working platform.
- Supporting *traceability* of e-mails through *categorization* using their individual metadata, e.g. to be able to assign processes to them.
- *Storage* and availability of e-mails, e.g. for fulfilling legal requirements.
- *Archiving* e-mails to reduce memory capacity requirements of the mail server.

The collaboration and traceability use cases are especially important to project management, since e-mails and file attachments comprise an essential part of project documentation.

Organizations that employ Microsoft Outlook traditionally also use Microsoft Exchange and its Public Folders (known as Managed Folders from Exchange 2007 onward) for collaboration within teams. Folder structures in a file system are normally used for managing documents. This method has the weaknesses described above. For this reason, Microsoft recommends SharePoint as a platform for various collaboration scenarios (the use of Public Folders is actively discouraged[1]).

SharePoint has several advantages over Microsoft Exchange or file system storage for managing e-mails and file attachments:

- *Metadata* supports the traceability of documents.
- *Version management* of documents supports the creation process and the comprehensibility of changes, thereby promoting cooperation.
- *Workflows* also support collaboration through the automation of processes.

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[1] See http://technet.microsoft.com/en-us/library/bb397221.aspx

- Global *storage guidelines* based on content type support legal requirements (compliance) and Information Lifecycle Management (ILM).
- An efficient *search* can be performed using metadata and content.

SharePoint's flexibility enables companies to apply various classification criteria and processing guidelines, thereby fulfilling a broad range of requirements with just one solution.

To benefit from the advantages of SharePoint for e-mail management and project documentation, the e-mails must be transferred to SharePoint.
But how do you transfer e-mails from Outlook to SharePoint in a way that your employees will accept?

## The key factors to successful e-mail management in teams and projects

Microsoft emphasizes in its White Paper "Breaking the Barriers to broad User Adoption"[2], that the key to a system's success is how well it is accepted by its users. Even if all other functional and technical requirements are satisfied, a system that is not accepted will enjoy only limited success.

Users welcome systems, which
- accelerate their work,
- increase their productivity and which they feel
- facilitate their work.

The following are therefore *crucial to the success* of their solution:

- *Simple operation*,
- recognizable *benefits* for the user. Both ensure
- broad *acceptance* by the user.

As mentioned above, e-mails from personal inboxes must be made accessible to the team, and must also be categorized for documentation and traceability.

These are additional management tasks for team members, which occur on a regular basis and are usually unpopular.

As project manager, you must provide your employees with a means for accomplishing these tasks that they will accept, so it has to be easy and convenient to use.

## Seven features you should keep in mind for a successful solution!

We believe that a solution for transferring e-mails to SharePoint has to fulfill the following technical requirements in order to be accepted and therefore successful:

*Operating convenience when transferring e-mails* — users have become accustomed to and expect to be able to move e-mails using the drag & drop function. For a solution to be accepted, it must fulfill this expectation.

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[2] See http://www.microsoft.com/en-us/download/details.aspx?id=20334

*Automatic capture of metadata* — a successful solution must automatically capture all metadata of an e-mail (To, From, Date, Subject, etc.) and save this data in SharePoint. Capturing this data manually would be tedious and prone to error and would have no chance of acceptance.

*Support of content types* — requisite meta data and document management rules can be defined using content types. A solution for mail management must allow users to be able to select the content types available in a library.

*Support of individual metadata* – one of the most important advantages of SharePoint over Exchange or the file system is the ability to define individual metadata for the purpose of categorizing e-mails and documents (e.g. process, customer no., project no, etc.). A solution for mail management must allow the users to select individual meta data during the transfer process. The use of meta data facilitates the traceability of relevant e-mails and therefore constitutes a significant benefit for the user.

*Automatic extraction of file attachments* – e-mails often accompanied include documents that serve project documentation purposes and have to be worked on further by the team. The original file should be retained for documentation reasons. Therefore, it should be possible to extract file attachments from the e-mail as the e-mail is being transferred and provide these attachments with metadata and content types, just like e-mails.

*All tasks in one operation* — for the user, transferring and categorizing e-mails and file attachments is *one* process. It must therefore be possible to accomplish these tasks in *one* operation — i.e. without interruption and without changing application. It must also be possible to transfer and categorize multiple e-mails in one operation, since repeating of the same processes over and over is time-consuming and is perceived as inconvenient.

*Retaining the file type for e-mails* – e-mails often have to be processed further after they have been transferred to SharePoint. An e-mail management solution must therefore retain the Outlook file type (.msg), so that the full functionality of Outlook remains available to the users.

## Which solutions do Outlook and SharePoint Out-of-the-box offer?

Microsoft offers the following approaches for transferring e-mails from Outlook to SharePoint.

These are:
- sending e-mails to SharePoint libraries
- copying e-mails via drag & drop to the Explorer view of a library
- transferring e-mails from Exchange 2007 Managed Folders to SharePoint automatically
- Site mailbox (since SharePoint 2013).

To get to the point: None of the stated methods permits the assignment of metadata or content types during the transfer to SharePoint, or the automatic capture of e-mail attributes or even the extraction of file attachments.
Let us consider the methods one-by-one:

### Sending e-mails to SharePoint libraries

SharePoint libraries can have e-mail addresses and e-mails can therefore be sent to these libraries.
This solution appears smart and simple at first glance, however, when viewed in more detail, significant disadvantages become apparent:
- Since the e-mail is forwarded from the user inbox to the library, it is also assigned new e-mail metadata: The employee who sent the e-mail to the library now appears as the

sender, rather than the original sender. The name of the library appears as the recipient instead of the original recipient, the same applies for the date of receipt.

- The e-mail metadata from the e-mail is not automatically saved in the library and must be entered manually.
- File attachments are not extracted from the e-mail. These must be uploaded individually via the Desktop and must also be provided with meta data manually.

## Copying e-mails to the Explorer view of a library using the drag & drop function

SharePoint libraries can be opened in Windows Explorer and e-mails can be moved from Outlook to Windows Explorer using the drag & drop function.
Therefore, there is an option to move e-mails to SharePoint via drag & drop.
However, this also has its drawbacks:

- Metadata cannot be specified and file attachments cannot be extracted. Both must be added manually afterwards.
- This method is laborious. First you have to switch from Outlook to SharePoint, navigate to the relevant library and open the Explorer view. Then the Outlook and Windows Explorer windows must be positioned side by side for drag & drop.

## Exchange 2007 Managed Folders with Auto-Copy to SharePoint

Exchange 2007 Managed Folders can be configured so that e-mails that are stored there can be moved automatically into a SharePoint library.
This method permits the convenient movement of e-mails via drag & drop within Outlook.

- The downside of this method is as above, that metadata cannot be specified and file attachments cannot be extracted. Both must be added manually by the user.
- A further disadvantage is that for each SharePoint library, to which e-mails are to be transferred, a Managed Folder has to be configured. A Managed Folder can, however, only be configured by Exchange Administrators, which can create considerable additional work for IT personnel.

## Site mailbox (since SharePoint 2013)

The site mailboxes, introduced with SharePoint 2013 offer the option of assigning e-mails to a project using the drag & drop function. The e-mails are then located in a folder that is shown on the SharePoint team site (the e-mails are **not** moved to SharePoint, but remain in the Exchange database).

However, this method also has its drawbacks:

- File attachments remain in the e-mail and are not available in the document library. Furthermore, these attachments must be manually moved into the library individually and the metadata must also be added manually.
- E-mails cannot be categorized with metadata from SharePoint and hence cannot be assigned to processes and the like (since they are still located in Exchange).

## Conclusion for the Out-of-the-box options:

None of the Out-of-the-box methods meet the key criteria described above for a successful solution.

Microsoft has left a considerable gap here, which can be bridged only by solutions from third-party providers.

*This conclusion also applies to SharePoint 2016 and Office 2016.*

# The solution: Centralized project documentation in SharePoint with the SOXS Outlook add-in

SOXS is a solution that makes it possible to have complete and coherent project documentation in Microsoft SharePoint.
SOXS integrates into Outlook and creates direct access to SharePoint within Outlook.
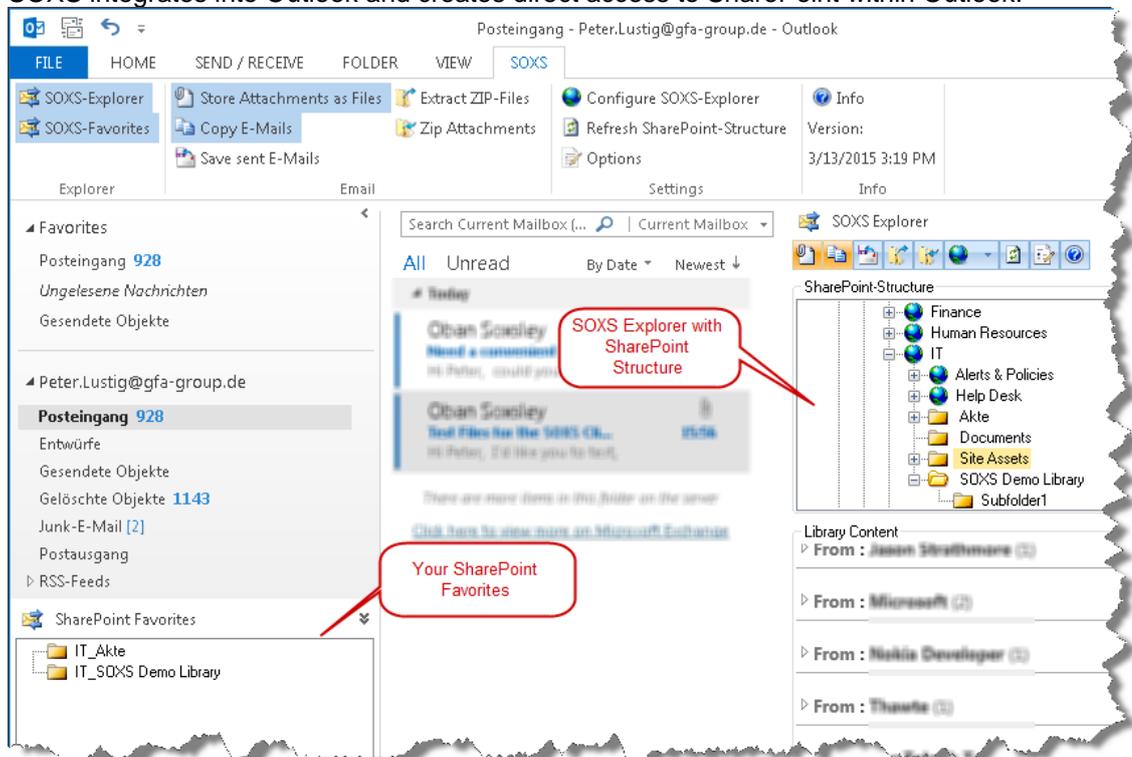


**Illustration 1: SOXS integrates SharePoint in Outlook**

The solution allows users to accomplish the following tasks *in one operation* without having to change applications:
Users can,

- Select all e-mails to be transferred
- Transfer e-mails by drag & drop
- Specify metadata for e-mails and file attachments
- Automatically capture e-mail metadata
- Automatically extract file attachments and assign them custom metadata
- Automatically unpack ZIP archives.

Users are able to add and assign e-mails to other project documentation as part of *one* coherent operation, in which all required tasks can be completed.
This mean that the key requirements for a successful solution listed above are satisfied.

*The gap between Outlook and SharePoint has been bridged.*

Therefore, your team gets the powerful document management functions of SharePoint for e-mails too, and...

*SharePoint can serve as a central information store for all project information.*

SOXS supports Office 2010, Office 2013, Office 2016, Windows 7, Windows 8, Windows 10, SharePoint 2010, SharePoint 2013, SharePoint 2016 in every combination.

## Want to know more?

SOXS is not only useful for transferring e-mails to SharePoint. It also helps in the same way when uploading files, e.g. for certain migration scenarios.
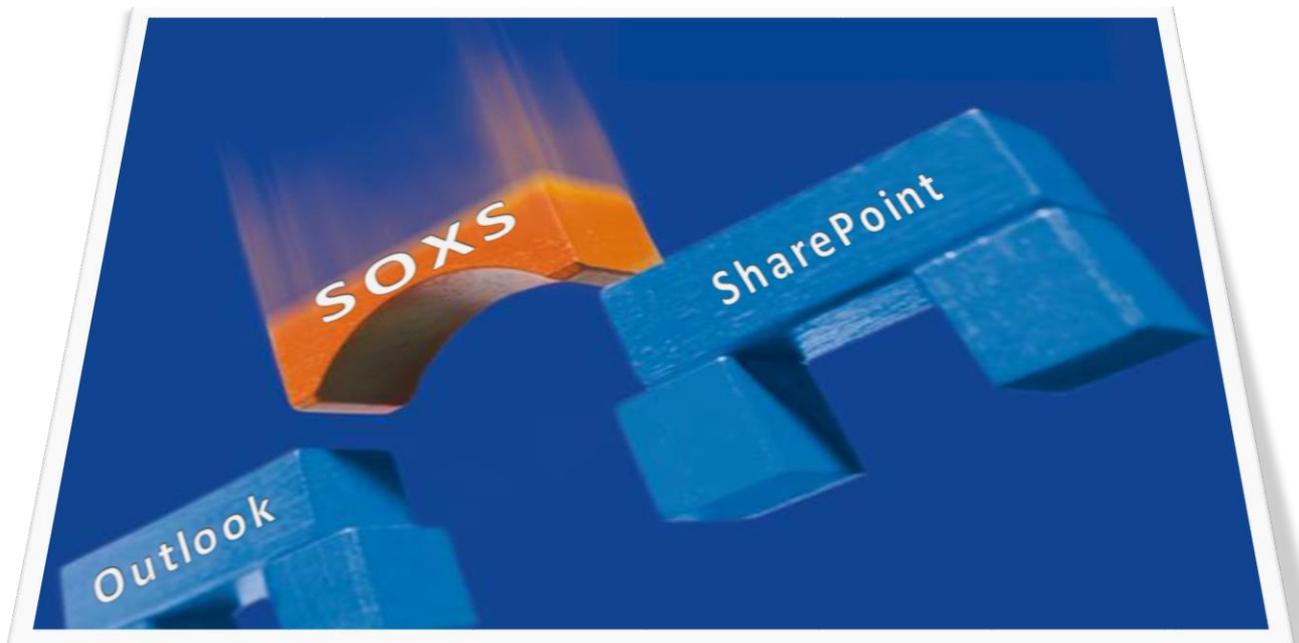
If you want to know more, take a look at the Video on SOXS[3] . This provides a good overview of the operation and scope of functions of SOXS.

## About GFA SysCom

*GFA SysCom GmbH is an IT-Solutions provider and systems integration is a Certified Microsoft Partner based in Hamburg.*

*We provide advice and support for planning and implementing SharePoint projects.*
*We develop upgrades and individual applications for supporting teamwork for document and knowledge management based on Microsoft SharePoint and Microsoft CRM.*
*We provide advice, services and information technology for medium-sized companies in the field of PC network and communication technology.*

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[3] http://soxs.gfa-syscom.de/index.html