



The Benefits of EmailFiler

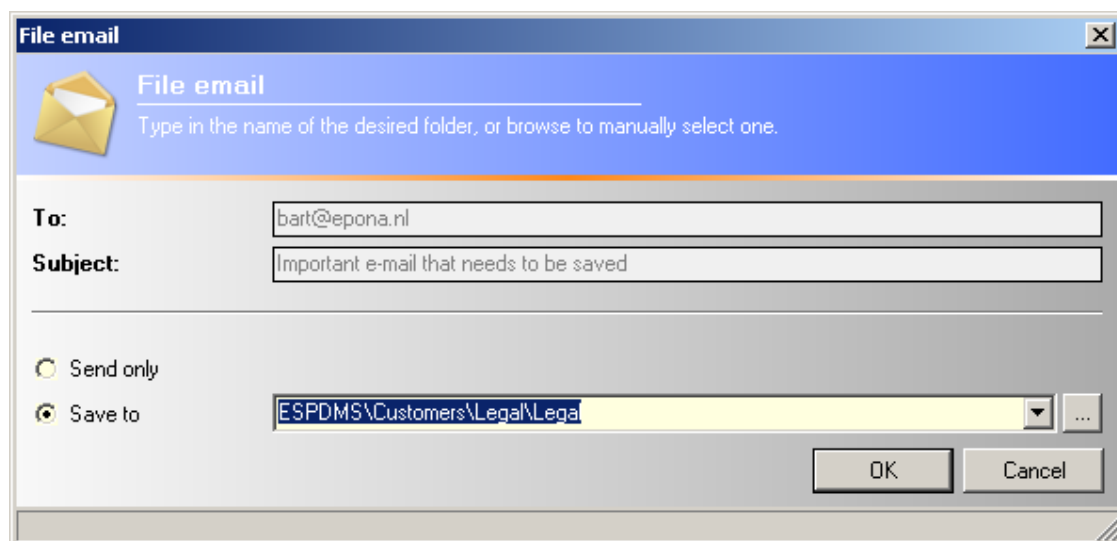
The importance and challenges of e-mail retention

E-mail messages are important business documents, on a par with more traditional types of documents such as memos, briefs, reports, etc. Project managers receive and send thousands of project related e-mails. Lawyers working for financial institutions archive important e-mail in personal Outlooklook data files (PST files) and print very important e-mails for their paper records.

These people have an immediate need to store, search and retrieve e-mails from SharePoint 2010 on a daily basis. They need to be able to access SharePoint in the easiest possible way because they are required to insert a lot of documents and e-mail messages into the SharePoint 2010 system. SharePoint's standard features do not accommodate this ease of use. EmailFiler fills this gap in SharePoint's functionality in a powerful and at the same time familiar way.

EmailFiler's core functionality is to enable the Outlook user to drag-and-drop e-mails, attachments from e-mails, and complete folder structures with e-mails from Outlook to SharePoint.

Additionally, when sending an e-mail, EmailFiler asks the user if the e-mail needs to be filed in SharePoint, and suggests a filing location on the SharePoint server, as shown in the screenshot below.



This feature is optional and can be turned off on a per user basis.

In the rest of this document we will outline the most important benefits of using EmailFiler within your organization.

Archiving: transform personal e-mails to stored business documents

In most organizations e-mail does not have a formal status. E-mail messages are considered personal communications between employees. The proper filing of these messages is not formalized and most users have their own personal strategy for saving important messages.

If an employee subsequently leaves the organization, that employee's mailboxes are often simply deleted, with no consideration given to whether important project, case or matter related information stored in these mailboxes should have been archived in a structured way.

More and more organizations are moving away from the departmental H:-drive to dedicated document management systems. This move requires a solution to be found for handling e-mail documents. These documents could be archived in an e-mail journaling system, saved in the customers CRM systems as correspondence with clients, or placed in the Project or Matter Site on the collaboration platform SharePoint 2010.

Organizations that choose SharePoint as their central depository for documents, e-mails and scanned paper (PDFs), need a quick and efficient way to move e-mails from the the Outlook inbox to SharePoint.

There are a number of standard ways to approach this problem in SharePoint. These include manual uploading, using e-mail enabled document libraries, and using SharePoint lists. All of these methods have their own distinct disadvantages which limit their usefulness. Manual uploading is time consuming and removes much of the metadata in e-mail, such as To, CC and Subject fields. E-mail enabled document libraries are inflexible for the user and burdensome for administrators to maintain. Lastly, SharePoint lists do not allow e-mail to be stored into them from within Outlook, and are a hassle for users to maintain.

Clearly, none of the standard approaches suffice when it comes to the smooth and efficient handling of e-mail documents between Outlook and SharePoint. This is where EmailFiler comes in.

EmailFiler behaves like a standard Outlook PST file or Exchange account: the Outlook user is almost unaware that they are retrieving e-mails from and storing them on a SharePoint server. With EmailFiler organizations can enforce policies to ensure that important incoming and outgoing e-mail documents are securely stored on the collaboration environment SharePoint. E-mail is no longer considered to be merely a personal messages, but an important business document worth saving and sharing with colleagues.

Migration: from Exchange Public Folders or H-drive to SharePoint 2010

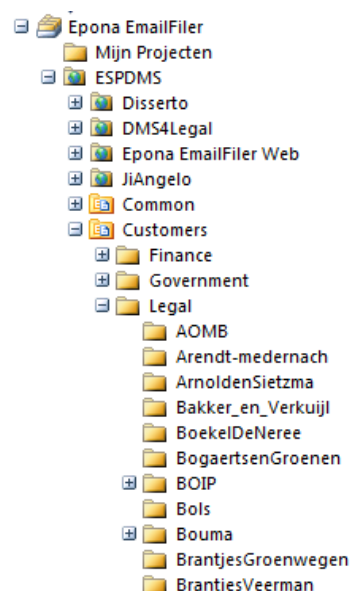
Just a few years ago we switched from floppy drives and C: drives to sharing information on a file server. Then most organizations got connected to the Internet and the flow of information shifted to working in Outlook and working with a shared Microsoft Exchange server in order to view each other's agendas and collaborate on tasks or contacts.

Since the launch of SharePoint in 2003, this product has been rapidly gaining market share in a way unprecedented for any other Microsoft software product. This new intranet collaboration platform is replacing existing intranets and public extranets, and will in the future replace your departmental file servers.

By branding this new collaborative platform SharePoint as "the new way of working", Microsoft is actively promoting the migration from local network based computing to using a computers device always and everywhere. You could be accessing your documents and e-mail on a PDA, on a portable, from your home, at a customer site, or at the office. Users need to be able to securely access and process company information outside the traditional office boundaries.

The SharePoint platform will enable customers to migrate from the H:-drive to a shared HTTP: drive. The question is: will your company migrate only the files it used to place on the traditional file server, or will you use this opportunity to migrate e-mails from the Inbox and e-mail on Exchange Public folders to SharePoint as well? If you are reading this document, then your answer will very likely be that you want to move your e-mail messages to SharePoint. The platform will enable you to share information contained in e-mail messages as well as to search through all the e-mails and documents in your organization, in ways you have not been able to on Exchange servers and on your current file servers.

Epona EmailFiler will display the contents of the SharePoint folders to your users in the familiar Outlook tree view. They will be able to move items from their Inbox, Sent Items and other folders in their personal e-mail store to SharePoint by dragging and dropping them directly into the destination SharePoint folder displayed in Outlook. These items can be single or multiple e-mails, attachments, a folder with e-mails, or entire folder structures containing any of the aforementioned items. In this way existing PST archives can be migrated to SharePoint in one go, with the end user evaluating the value of migrated information.



Easy: no training needed for Outlook users

Many people dislike having to constantly switch between multiple software applications to get work done. They like dashboards, where common tasks are well-organized and intuitive to carry out. Also,

most employees in an organization have experience with using Outlook, and indeed will often start their working day opening Outlook.

EmailFiler is an application that is completely embedded in Outlook. Users will have a hard time finding out where Outlook ends and where EmailFiler starts. They will be using the company's SharePoint server without even knowing it and without needing any additional training.

One of our customers described it as follows: "Using Epona's EmailFiler, all of Sharepoint's advantages lie beneath the surface of the way people use Outlook every day. A company's IT department could deploy EmailFiler overnight and the next morning everyone would unknowingly be using Sharepoint instead of Public Folders to store their documents. Advanced features could then be implemented slowly on a folder-by-folder basis and not mandated until after everyone's over the learning curve."

Right from Outlook, users can read or navigate through e-mail messages placed on the SharePoint server. These messages can be replied to or forwarded as normal. These replies and forwards can then also be filed, thus creating a full audit trail of all Matter, Case, Client or Project related e-mail correspondence.

The SharePoint webview is not always the most efficient way to insert new information into SharePoint. Uploading a new e-mail and editing its metadata will usually require quite a few manual actions. Using EmailFiler it is a simple matter of dragging and dropping the e-mail into the SharePoint destination folder displayed in Outlook.

Compliant: archive important e-mails to SharePoint 2010

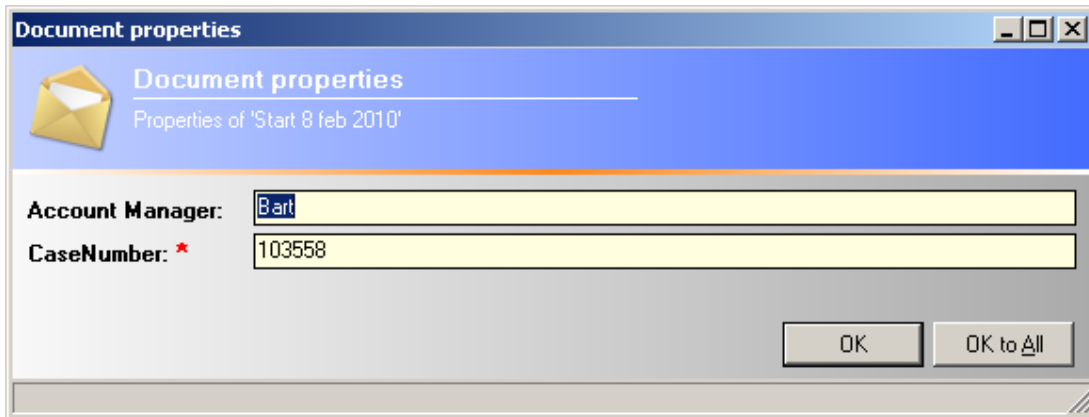
E-mail is often undervalued as a business document. Even though employees are using e-mail to enter into agreements with suppliers, partners and customers, e-mail is still considered to be merely a personal means of communication.

Compliance officers are starting to define new company policies about e-mail, specifying rules for the retention or deletion of e-mail messages. What if the information in your project, matter, or client-case is suddenly a part of a legal claim in the discovery phase of legal procedures?

Storing relevant incoming and outgoing e-mail messages in SharePoint creates a record, automatically creates an audit trail of what your company knew at what time, and what was exactly agreed upon by whom.

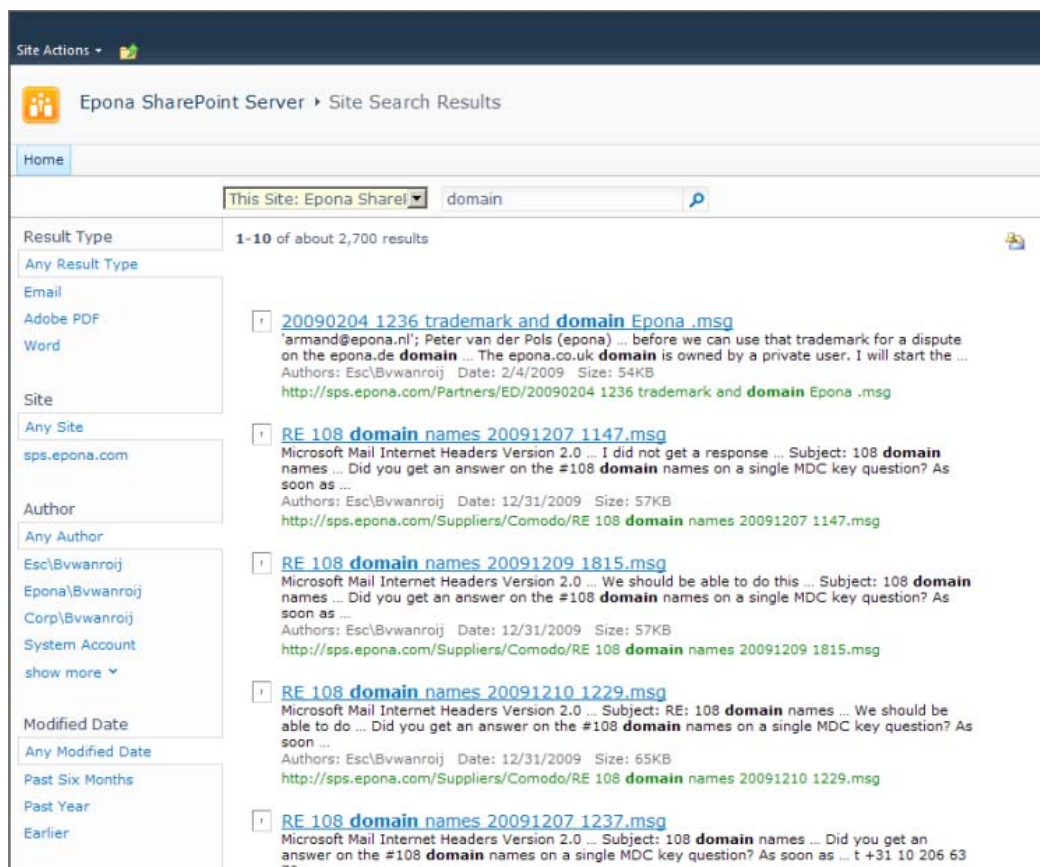
The accuracy of retrieving the correct information from SharePoint can be enhanced further by adding additional metadata, information that describes the content that you are storing in SharePoint. That metadata could contain a date when specific information needs to be automatically deleted or a reference to the responsible legal officer or client record.

EmailFiler will ask the user to provide extra non e-mail related metadata if such requirements are set on the destination. The system will only ask for essential in context information. No change is needed in EmailFiler to add or change metadata. The SharePoint administrator only has to define the information in SharePoint and EmailFiler will use that information.



Search: maximize the leverage of SharePoint search

SharePoint offers great search capabilities that can be easily augmented with free drill-down search enhancements and free filters for new document types such as PDF and MSG. In the screenshot below you will see the result of a search executed on SharePoint.



Using drill down search we can narrow the results to include only those messages or documents that we are searching for. These search features were never available on the file server or in Exchange public folders. The collaboration platform SharePoint provides you with the means to search through all of your enterprise office documents, including e-mails.