

# Microsoft's strategy for email and document management

harmon.ie whitepaper  
February 2016



[Introduction](#)

[What is Document Management?](#)

[A Short History of Microsoft Document Management](#)

[Document Management Becomes a Key Part of Information Governance](#)

[Documents / Email Divergence](#)

[harmon.ie: A Unified SharePoint / Exchange Architecture](#)

# Introduction

In the course of your roles and activities as a corporate executive, you need to manage a huge number of responsibilities and regularly make significant decisions. These cover a wide range of issues and your choices have a significant impact on your organization's bottom line. These decisions cover company strategy, organizational culture, agreeing on new deals, building solid client relationships, and making bold choices about product or service design to name but a few. With all

these important and high impact choices crowding your agenda, shifting decisions about document management to low on your list of priorities is understandable. It can be tempting to see document management decisions as an afterthought, yet, as this whitepaper outlines, ignoring document management, especially in the context of managing important emails of record, can be a costly mistake indeed.

Document management – the way your company stores digital documents, invoices, work orders, email or other correspondence and more – is incredibly important for the health of your business. And because documents are the lifeblood of your business, they need to be managed efficiently and judiciously.

According to Microsoft's own market research, 78% of the fortune 500 companies use SharePoint to manage their documents. Given the dominance of Microsoft's flagship document management platform, you need to understand how Microsoft envisions the future of document management, because it may well impact your own organization.

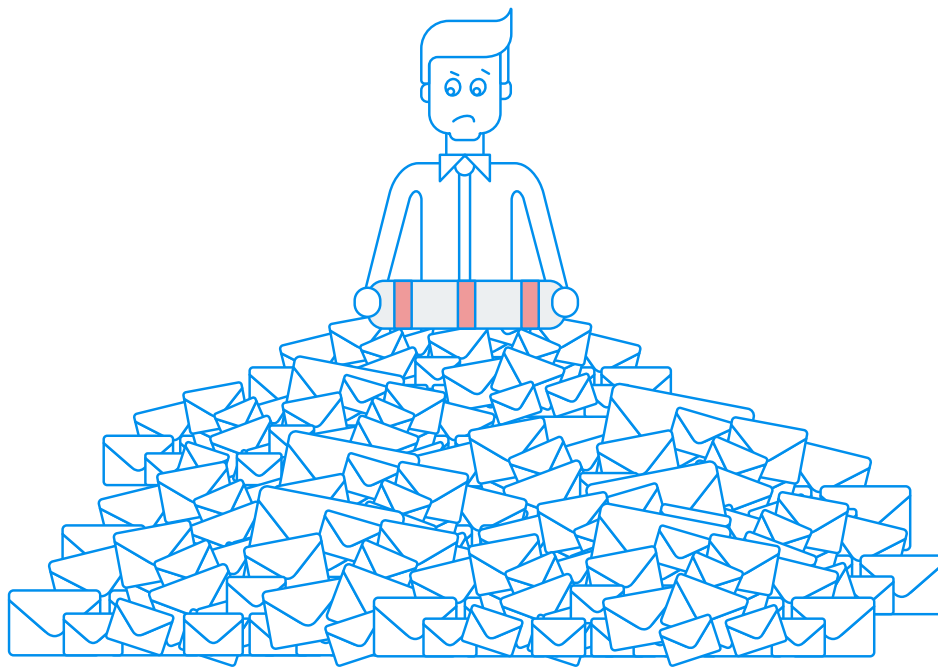
This whitepaper explores how Microsoft plans to advance document management in the coming years, and it explains the changes executives need to make in order to significantly improve information governance as it relates to document and email management.

# What is Document Management?

Document management, as the name suggests, is a term that covers the sets of policies and procedures that govern how an organization treats and stores its documents.

This includes the limits it sets on document retention, disposal and security – covering who can read different types of documents and what they can do with them.

Efficient document management is key to organizational success. As industry magazine KM World reports, a number of different studies have estimated that knowledge workers spend up to 35% of their time at work searching for information. Furthermore, 40% of corporate users struggle to find the information they need to do their jobs on company Intranets.



Of course, these figures will vary by industry and role, yet if employees struggle to find information in a timely manner, the business suffers. The inability to find and produce records for discovery and audits, leads to non-compliance with information governance directives, industry compliance, or regulatory requirements.

# A Short History of Microsoft Document Management

SharePoint was first introduced in 2001 as a file share application. Since then it has grown into something far greater, yet at its core it retains this fundamental role. When SharePoint was first introduced, the possibility of a 'paperless office' still felt relatively far off. Although many businesses were already in the process of migrating to electronic documentation, the majority still depended on large filing cabinets and paper-based processes for document management.

As enterprise IT has grown exponentially into almost all areas of business, Microsoft in general – and SharePoint in particular – has played a huge role in the way companies across the world work with and manage documents. SharePoint has introduced many powerful features and tools over the years – such as libraries, permissions and version control, and as such has given end users real control over how they work and interact with documents in the workplace.

Despite the advances Microsoft has brought to document management, certain features of SharePoint have in fact made document management harder, more onerous and more confusing than before.

In particular, Microsoft has forced users to take an unusual approach to managing emails, which today are often documents of record, forcing them to store emails in their Exchange/Outlook inboxes, separate from other documents. We will explore the reasons for and consequences of this choice later in the whitepaper, but this unnecessary dichotomy has historically produced a great deal of confusion for information workers.



# Where SharePoint Falls Short

It is not uncommon for users to complain about how SharePoint is difficult to use and makes it hard to find documents. Writing for the specialist [Nothing but SharePoint site](#), [David Lavenda, VP of Product Strategy at harmon.ie](#), summarizes five of the principle reasons users struggle with the platform:

1. Deployment takes too long
2. SharePoint cannot be used 'out-of-the-box'
3. It takes a 'Swiss Army Knife' approach to all content types, yet ends up as little more than a landfill for documents
4. It offers a poor user experience
5. It offers little mobile device access

Let's add to this list the inability of SharePoint to handle emails 'out of the box.' As we will shortly see, email represents a significant portion of digital documentation in today's workplace. The bottom line is that with SharePoint, Microsoft has developed a tool which can rapidly become incredibly disorganized and hard to use. Worst of all, users continue to store emails in Exchange, which means when they need access to information, they need to search for emails and documents in two different environments.



# Microsoft is Changing

Microsoft has recognized that this approach is damaging productivity and cutting efficiency. When employees spend as much time looking for documents as they spend actually working on them, the benefits of the digital workplace are significantly curtailed.

As such, in recent years, Microsoft has started to change its approach in this area. The IT giant has released new products and press releases which demonstrate an awareness of these issues and a determination to improve the document management issues users encounter:

1.

Microsoft plans to integrate simple collaboration into email by letting users more easily save and share document attachments to and from OneDrive and recent SharePoint sites into their emails. While this is a welcome move, it does not solve the basic problem; workers will still not be able to easily save emails to SharePoint and even if they were able to, there is no way to add metadata to these emails so they can be found easily.

2.

Microsoft offers small steps to patch the dichotomy between Exchange – its popular email service – with collaboration tools like OneDrive and Office Groups, mainly through an improved user experience in Outlook. But there is no roadmap for the unified email and document management service based on SharePoint that end users need. Merging Exchange, the platform that

supports Microsoft's 500 million email users with its almost 200 million SharePoint users is extremely challenging, if not entirely impractical. Exchange and SharePoint are very different infrastructures that were originally intended for very different purposes.

3.

In September 2015 Microsoft launched Outlook 2016, which included tighter integration with 'Office Groups.' Incorporating new Office 365 collaboration capabilities in Outlook means that from within the Outlook interface, users can create and join collaborative Groups, @mention colleagues, catch up on conversations, view shared calendars and follow links through to files and more. Again, this is welcome, particularly for those organizations with a light 'document footprint'. However, those who depend on SharePoint for large scale document management will gain little or no benefit from this update.

## 4.

Another improvement in Outlook 2016 is the improved ease with which users can attach recently-edited files to email messages.

Rather than having to dig through files and folders to find them, workers will be able to attach recently-edited documents much faster.

## 5.

Microsoft has also made collaboration and sharing much easier in Office 2016. In particular, it is now possible to share a document with a co-worker via email. From a button on the top right of a Word, Excel, OneNote or PowerPoint document, users can share the file with colleagues and directly send it via an email message. This gives collaborators a link to the document stored in OneDrive, OneDrive for Business or a limited set of SharePoint documents. In the business

context, this will certainly facilitate internal collaboration, although sending attached documents to external users from SharePoint will continue to require the users to save a file then add it as an attachment. Also, note that it only works for those organization who have migrated to Office 365; it will have no impact on those organizations who still have on-premises SharePoint.

## 6.

Introduced in early 2015, the 'Save to OneDrive' feature has also improved a worker's ability to save attachments in the cloud, although it should be noted this doesn't cover on-premises SharePoint or SharePoint Online. Also, files are added to an email attachments folder, rather than directly to the folders users might actually want to store them in.

While all these efforts to improve email and document management in SharePoint are welcome, at the end of the day, they don't solve the main challenges of the structured document and email management that most organizations need. Improving the user interface or creating the ability to save attachments more easily to OneDrive is a positive development, yet it is more of a 'band-aid' than a real, fundamental solution.

One of the main issues is that Microsoft continues to force workers to separate email from all other kinds of documents. A new, more unified approach to email and document management using Microsoft products is needed.

# Document Management Becomes a Key Part of Information Governance

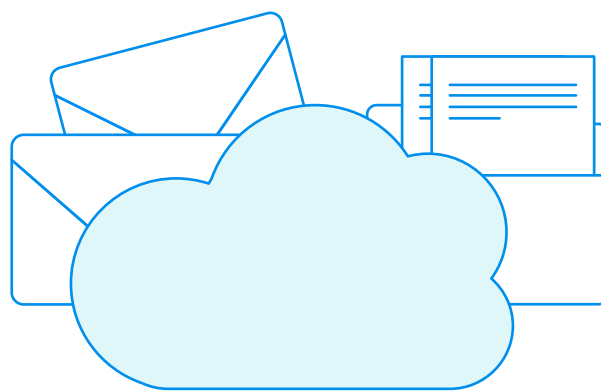
Document management is an ever-evolving practice. The way we approach document management today is very different to how we did just ten years ago, and this will likely change further in the coming years.

In the past, most organizations developed more or less sophisticated paper filing systems. Typically, all the correspondence, plans, proposals and other documents attached to a specific client, project or case would be held together within one folder, meaning anyone could open it and find all the relevant information later.

Today, advances in cloud technology have changed the game once again. Business users can save and store documents with cloud providers such as OneDrive for Business, Google Drive or Dropbox. These environments are relatively cheap compared with traditional 'local servers' physically installed on the company's premises. Cloud technology allows users to save enormous amounts of data and access it anywhere, any time.

Of course, paper offices had their risks and dangers too, and when technology companies began introducing methods of storing data electronically, the possibilities of backing work up expanded enormously.

By the beginning of the 21st Century, most companies were shifting to a digital-first methodology, introducing email and document management tools. SharePoint emerged at this time, using local shared networks as a means of sharing and saving files between users.





# Documents / Email Divergence

## Documents

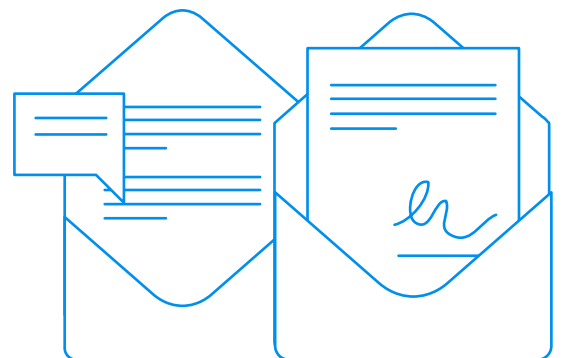
As any technology evolves, it is not unusual for errors and incongruities to appear. In the realm of document management, a major issue has been the separation of email from other types of documents. As outlined above, when companies used to work with paper files, all documents and correspondence with clients would be stored in one folder within a filing cabinet. This meant that anyone who wanted to trace the full history of a deal, transaction, agreement or anything else, could find every single document saved in one place. Of course, paper filing has its

own limitations, but in this respect, it was particularly effective. By contrast, most modern document management systems separate email correspondence from all other types of documents. At present, emails are universally stored within an individual's Exchange/Outlook inbox, locked away from co-workers. By contrast, proposals, reports, maps, blueprints, design documents, photos, videos, guidelines, legal documents and every other type of correspondence are saved within the SharePoint shared space, available to approved co-workers.

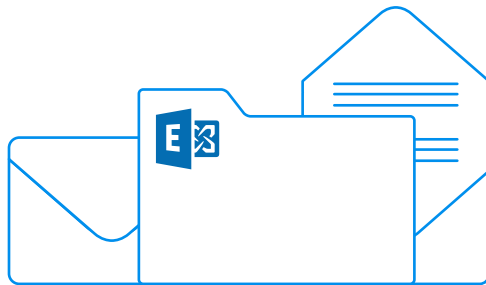
## Emails

Email existed prior to many other types of modern electronic documents, and evolved differently to most of the Internet. As a consequence, users and organizations tend to see them as somehow 'different' kinds of documents. Nevertheless, emails are actually used in the same way as all other document types:

- They are used to build relationships with clients
- They can be a proof of transaction
- They let users delegate and manage tasks
- They're used for sharing other documents
- They are used to request work orders



Nonetheless, most companies ask their users to store emails in their inboxes where they are incredibly hard to find. This leads to a range of problematic situations. Below, we outline two typical scenarios which arise as a result of separating email from other documents:



If a user needs to check when a certain agreement in the past took place, but can't remember whether the agreement was made via email or in a formal proposal, they need to hunt through SharePoint **and** their inbox.

Correspondence with external parties is often only stored in an employee's inbox. If that person is ill, on vacation, or has left the company, those documents are inaccessible to everyone else.

These kinds of scenarios lead to potential information governance disasters and costly discovery and audit failures. It is clear that storing emails separate from other document types is a ticking time bomb for organizations that rely upon information to run their businesses.

It is clear that for the myriad of organizations that rely upon Exchange and SharePoint to run their businesses, a unified solution is sorely needed.

# harmon.ie: a Unified SharePoint / Exchange Architecture

Given the issues that arise from separating email and other kinds of documents, a solution that combines these document types together with email is critically needed. harmon.ie was uniquely designed with this goal in mind. harmon.ie is an Outlook email sidebar and series of mobile apps that link directly to SharePoint. With harmon.ie, users are able to simply drag and drop documents

as attachments between SharePoint and Outlook, and saving emails to SharePoint document lists and libraries using exactly the same drag and drop method.

In this case, harmon.ie automatically assigns SharePoint metadata to email messages, so they can be found later...together with important project or case documents.

harmon.ie today helps over 1.5 million enterprise users achieve high adoption rates and return on investment for their SharePoint and Office 365 deployments. By making email management an integral part of document management, harmon.ie helps organizations meet information governance requirements and compliance goals, while drastically reducing the amount of time employees spend hunting for files and emails, so they can focus more attention on doing their work.

# How Does harmon.ie Help Organizations?

To demonstrate the power of the harmon.ie solution, the following illustration of an accounting consultancy demonstrates just how much of a difference a unified approach to email and document management can make.

## Case Study

A consultancy employs several thousand people and is heavily-dependent on documents and email when communicating with clients. Employees regularly send and receive work orders, reports and proposals via email. These need to be stored securely and managed meticulously.

When the company was founded, consultants would store all their templates and documents on local drives. It soon became apparent that this was leading to duplication and confusion, so the firm chose to deploy SharePoint across their local servers.

The firm was disappointed. SharePoint, the new document management system, was not being used and therefore not working. Employees found it difficult and frustrating when they wanted to attach documents from SharePoint to their emails and vice versa. When they wanted to save whole emails to SharePoint, they had to download these as separate files then upload these to SharePoint and add metadata. This was a tedious and onerous task, and employees very quickly abandoned the process.

At the outset, SharePoint proved to be a success. Employees could access files more easily, avoid confusion and could be sure that all documents were stored with correct metadata. However, as time went by, the gap between SharePoint and Outlook began causing more and more friction and employees started to abandon SharePoint, reverting to the old way of storing documents on their local drives or using their personal cloud-based environments such as Dropbox or OneDrive.

# harmon.ie to the Rescue

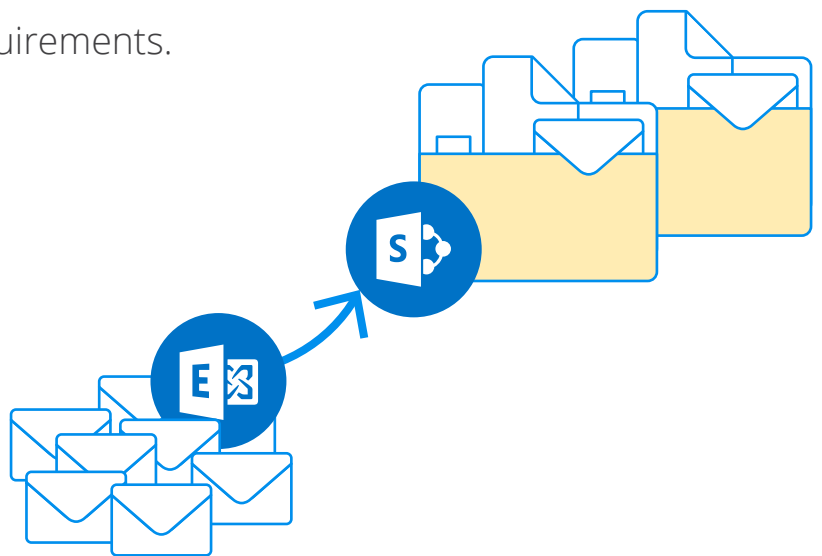
The firm knew they had to unify their approach to email and document management. But they didn't want to abandon Exchange and SharePoint, in which they had invested huge amounts of effort.

They downloaded the free version of the harmon.ie Outlook sidebar and tested it with a limited number of employees.

Once harmon.ie was installed, workers quickly reported that they were able to store and classify documents and emails while continuing to work in Outlook. By not having to change the way they worked, employees quickly grasped the potential for realizing information governance requirements without rolling out new management software and without training.

Particularly valuable here was that harmon.ie automatically added SharePoint metadata by translating email headers to SharePoint columns, so information could be found later on.

harmon.ie was subsequently rolled out across the company. Adoption was almost immediate and complete. In the past, workers took it for granted that finding a document or piece of correspondence might take up to twenty minutes or even more. That changed radically with the introduction of harmon.ie and meant the business was able to meet information governance and compliance requirements.



# Conclusion - harmon.ie Delivers on Microsoft Information Governance

While Microsoft has made a number of announcements about the future of email within SharePoint and Office 365, this whitepaper has highlighted where these 'solutions' fall short. To overcome these shortcomings, harmon.ie's unified approach for managing emails and documents is a practical and cost-effective way to deliver on information governance and compliance requirements using the Exchange and SharePoint/Office365 infrastructure already in place.

**Learn more about harmon.ie's solutions for email and document management.**

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