

SharePoint 2013 Site Mailboxes

Overcome the Limitations

Abstract

Since the inception of Microsoft SharePoint, integrating email and providing an intuitive means for an end user to interact with SharePoint from within Microsoft Outlook has been missing.

Are Site Mailboxes in SharePoint 2013 the answer to solving this problem?

Microsoft SharePoint 2013 has introduced a new concept called Site Mailboxes to help address Microsoft Outlook integration and broaden the enterprise content management (ECM) capability of SharePoint. Site Mailboxes provide for better management and compliance of content with the ability to define retention policies at a site level, encompassing both SharePoint and Exchange content. In addition to Site Mailboxes, SharePoint 2013 also offers significant enhancements to eDiscovery and the introduction of an eDiscovery Centre.

In this whitepaper, we'll look at what SharePoint 2013 Site Mailboxes are and the benefits they offer from the perspective of end users, records management and the IT Department. Secondly, we'll identify limitations of Site Mailboxes and present three approaches for implementing solutions to meet your business requirements.

Finally, the whitepaper will look at how the limitations of Site Mailboxes can be overcome by extending and complementing Site Mailboxes with OnePlaceMail. Therefore, leveraging the benefits provided by both Site Mailboxes and OnePlaceMail to broaden the solutions you can deliver on the SharePoint platform.

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The Benefits and Limitations of Site Mailboxes

What are Site Mailboxes?

From an end users perspective, Site Mailboxes bring together SharePoint 2013 and Exchange 2013 within the Microsoft Outlook 2013 Client. This enables an end user to keep email in context, interacting with both SharePoint and Microsoft Exchange without leaving the familiar interface of Outlook.

Site Mailboxes are simply SharePoint Sites extended (via the SharePoint Site Mailbox App) to provide a related Exchange Mailbox. Extending a SharePoint Site with the Site Mailbox App allows the creation of retention policies at the Site level for both SharePoint and Exchange content. Site Mailboxes are provisioned and made available to the end user within Microsoft Outlook based on the security permissions of the SharePoint site.

The following TechNet article provides a further explanation of Site Mailboxes:

<http://blogs.technet.com/b/exchange/archive/2012/08/22/site-mailboxes-in-the-new-office.aspx>

From within Outlook, Site Mailboxes provide users with a consolidated view for accessing both documents stored within SharePoint and emails stored within Exchange:

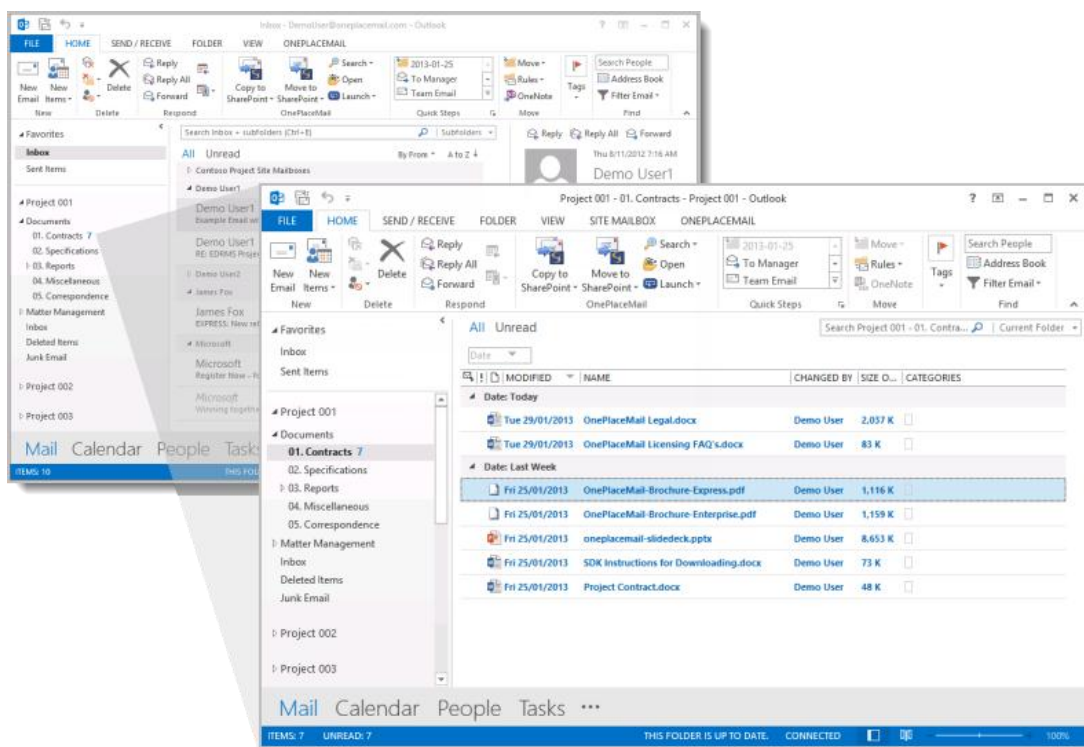


Image: Site Mailbox – Access SharePoint documents from within Microsoft Outlook 2013 (via Microsoft Exchange View)

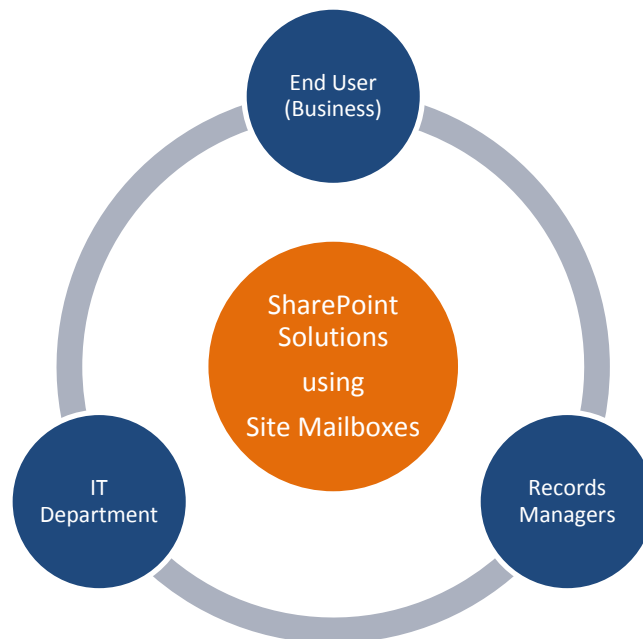
Tip: A Site Mailbox can contain multiple document libraries within Microsoft Outlook. You must add the document library to the quick launch menu in SharePoint for it to be made available in the respective Site Mailbox shown within Microsoft Outlook.

The benefits of Site Mailboxes

Site Mailboxes in SharePoint 2013 provide an opportunity for improved enterprise content management (ECM) and in particular, better email management and collaboration.

When implementing solutions to meet end user business requirements, consideration for Records Management and the needs of the IT Department often form part of the underlying business requirement and restrictions. Therefore, the benefits and limitations of Site Mailboxes are best viewed from the 3 perspectives:

1. End User (Business)
2. Records Management
3. IT Department



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Overcome the Limitations of Site Mailboxes

End User (Business)

1. Site Mailboxes provide a consolidated view of site content stored within SharePoint and Exchange from within Microsoft Outlook
2. Minimal change with a familiar drag & drop process to the left navigation of Outlook. Allowing the capture of emails or email attachments into SharePoint and Exchange
3. Convenient access to SharePoint content from within Microsoft Outlook using a familiar metaphor of folders on the left navigation of Outlook.
4. Ability to include a Site Mailbox as an email recipient (e.g. cc'd) for saving emails into a Site Mailbox - Inbox
5. Ability to 'Forward' a link to a document within a Site Mailbox or drag/drop multiple documents into an email message. Therefore, reducing duplicate documents and large attachments being emailed over the network

Records Management

1. Lifecycle Retention policies can be applied at a Site Mailbox level behind the scenes
2. Management and Compliance: Site Mailboxes can be part of eDiscovery Search Scopes. Therefore, both emails and documents can be put on legal holds.
3. Records are created through the lifecycle of document management and user engagement within business workflows
4. Minimal change for the end users and therefore greater user adoption and promotion of enterprise content management best practices
5. Less reliance on the IT Department once the SharePoint and Exchange environment have been configured for Site Mailboxes

IT Department

1. More efficient means to support the business with records management initiatives
2. Streamlined provisioning and deployment of Site Mailboxes to end users based on security permissions within a SharePoint Site
3. Email content is retained within Microsoft Exchange while documents are retained within SharePoint
4. Reduced network traffic with the promotion of sending links to documents instead of email attachments

The limitations of Site Mailboxes

SharePoint Site Mailboxes struggle to meet the needs of end users, while satisfying records management and IT Department requirements.

Significant limitations/weaknesses are as follows:

No tagging of content with Metadata

1. No provision to capture email attributes from originating email when saving specific email attachments
2. No provision to capture email attributes when saving emails
3. No ability to tag content with custom metadata
4. No ability to select a library content type
5. No validation of metadata, files are saved checked-in
6. No ability to rename a file when saving to SharePoint
7. No support for versioning documents. If a document is saved to a location where a document of the same name exists, the save will fail and the user is notified accordingly via email.

Limited integration with File Explorer and other Office applications

1. No unified view of Site Mailbox locations from Microsoft Office (Word, Excel and PowerPoint) when saving and tagging with metadata
2. No unified view of Site Mailbox locations when saving files from File Explorer

Limited access to SharePoint capabilities when viewing content

1. No easy way to switch to a SharePoint view of the library content
2. No mechanism to View/Edit the selected items properties

Limited attachment and Link Management

1. No facility to replace attachments with links
2. No support for using document ID's when inserting links
3. No ability to insert SharePoint/Site Mailbox content as attachments when sending to external recipients

Technology Restrictions

1. Only available when using the full 2013 server technology and associated prerequisites.
 - a. SharePoint 2013 / Office 365
 - b. Exchange 2013
2. Requires a Site Collection be configured to use HTTPS
3. Site Mailboxes are only available to the end users within Microsoft Outlook 2013
4. Hard limit of 10 Site Mailboxes within Microsoft Outlook.

The [Prepare for using site mailboxes in Office 365](#) article provides a FAQ's section and links to other useful documentation.

Should I use Site Mailboxes?

When planning your SharePoint environment and designing solutions to meet a business requirement on the SharePoint platform, ask yourself these questions:

1. Should I use Site Mailboxes?
2. Should I use a 3rd party solution?
3. Is there a way I can extend Site Mailboxes to do more?

Approach 1: Site Mailboxes only

Site Mailboxes require your server environment to be running on the SharePoint 2013 and Exchange 2013 platforms. In addition, your desktop must be running Outlook 2013. If you have these prerequisite technologies, Site Mailboxes are a consideration. Microsoft Office 365 environments (running 2013 technologies) provide support for Site Mailboxes.

The limitations of Site Mailboxes previously mentioned, restrict the use cases you can satisfy. They will meet basic business requirements; however, on their own, will fall short when trying to deliver more extensive solutions.

Approach 2: OnePlaceMail only

There are many instances where an organisation will not implement Site Mailboxes. This could be due to the required 2013 technology for Site Mailboxes not being available or Site Mailboxes simply not meeting the business, IT and Records Management requirements.

In these instances, you can utilise the full capability provided by OnePlaceMail to meet your business requirement.

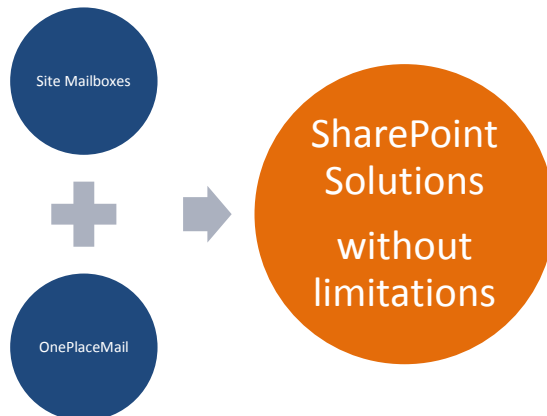
OnePlaceMail brings the full power of Microsoft SharePoint to the end user within Microsoft Outlook. As an end user, OnePlaceMail streamlines the capture, classification and access to SharePoint content from within Microsoft Outlook and other desktop applications.

Full support is provided for SharePoint 2013, 2010, 2007 and Office 365 server environments. The solution is available for Office / Outlook 2013, 2010 and 2007 clients.

Refer to www.scinaptic.com for further information about OnePlaceMail.

Approach 3: Site Mailboxes + OnePlaceMail

OnePlaceMail seamlessly extends Site Mailboxes to overcome their limitations and provide additional capabilities to cater for a broader set of business requirements and solutions you can implement on the SharePoint platform.



Extend Site Mailboxes

OnePlaceMail leverages the existing framework of Site Mailboxes and extends these capabilities to overcome some of the inherent limitations whilst retaining the underlying benefits of the framework.

Complement Site Mailboxes

OnePlaceMail provides additional capabilities not available in Site Mailboxes. These capabilities do not require Site Mailboxes be implemented but complement Site Mailboxes if they are.

Answering the Questions:

For each business requirement, you can choose the approach above most suitable for a solution to your requirements. Therefore, a business analyst or solution architect can map the business requirements on a case by case basis to the technology solution that will best achieve the desired result.

This could be to use:

- Site Mailboxes only,
- OnePlaceMail only or
- Extend and complement Site Mailboxes with OnePlaceMail.

Overcoming Site Mailbox Limitations

This section focuses on extending and complementing Site Mailboxes with OnePlaceMail to overcome their out of the box limitations.

Tag of content with metadata and perform validation

Capture and promote email attributes when saving emails

When saving emails or email attachments to document libraries (or folders and document sets within libraries) of Site Mailboxes, email attributes such as the To, From, Sent Date, Received Date, etc. are not captured and promoted to SharePoint columns.

OnePlaceMail extends the SharePoint libraries within Site Mailboxes to automatically capture email attributes and promote the email attributes to SharePoint columns. [Watch Video...](#)

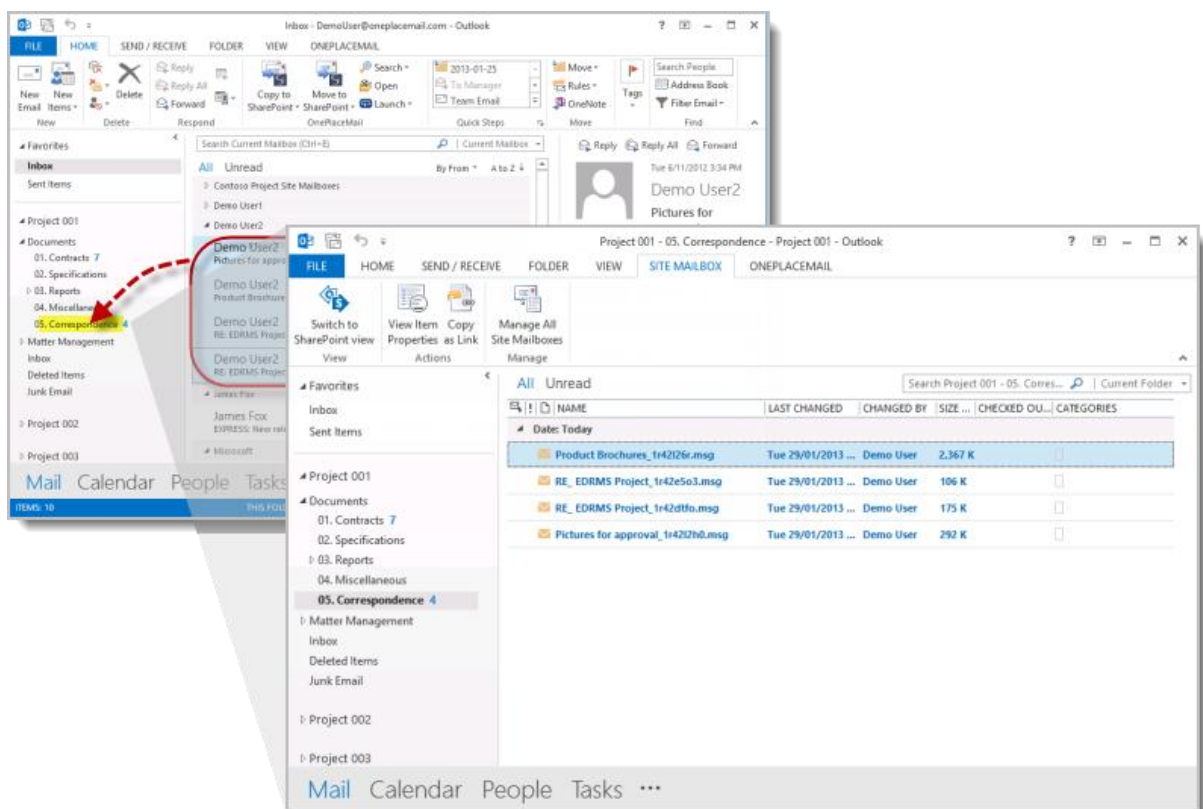


Image: Drag & drop emails to a Site Mailbox Library and automatically capture email attributes

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Overcome the Limitations of Site Mailboxes

The email attributes are available within SharePoint as standard columns.

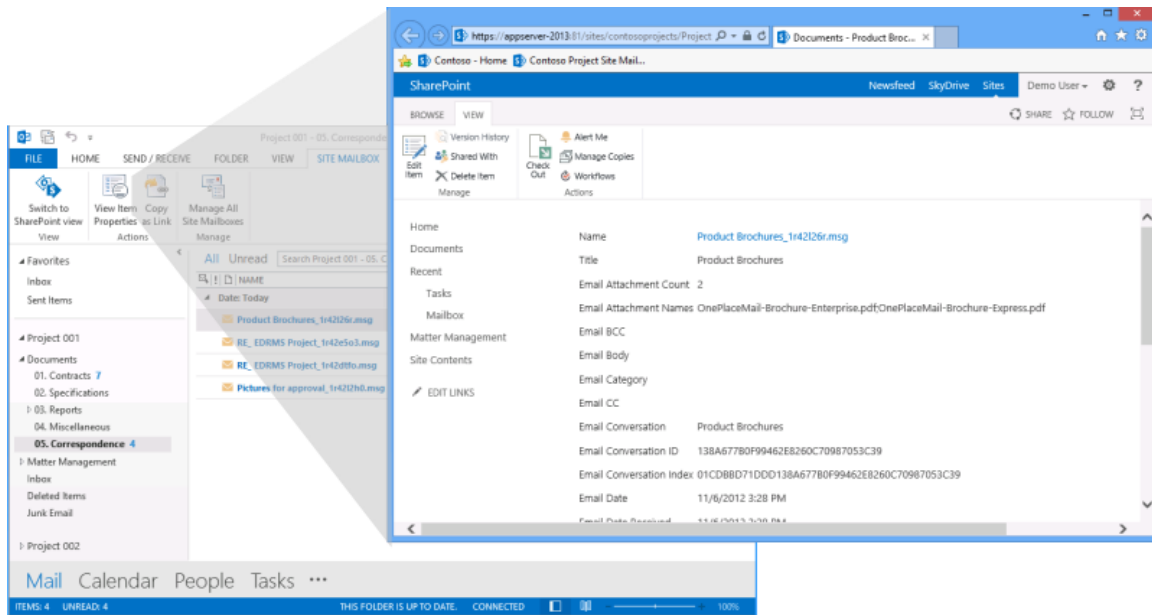


Image: SharePoint Item Properties for saved emails showing the automatically captured email attributes

Capture and promote email attributes when saving email attachments

When saving email attachments to Site Mailbox document libraries, OnePlaceMail extends the Site Mailboxes to capture email attributes for the email the attachments are being saved from. These email attributes are promoted to SharePoint columns in the same manner as when saving email messages. [Watch Video...](#)

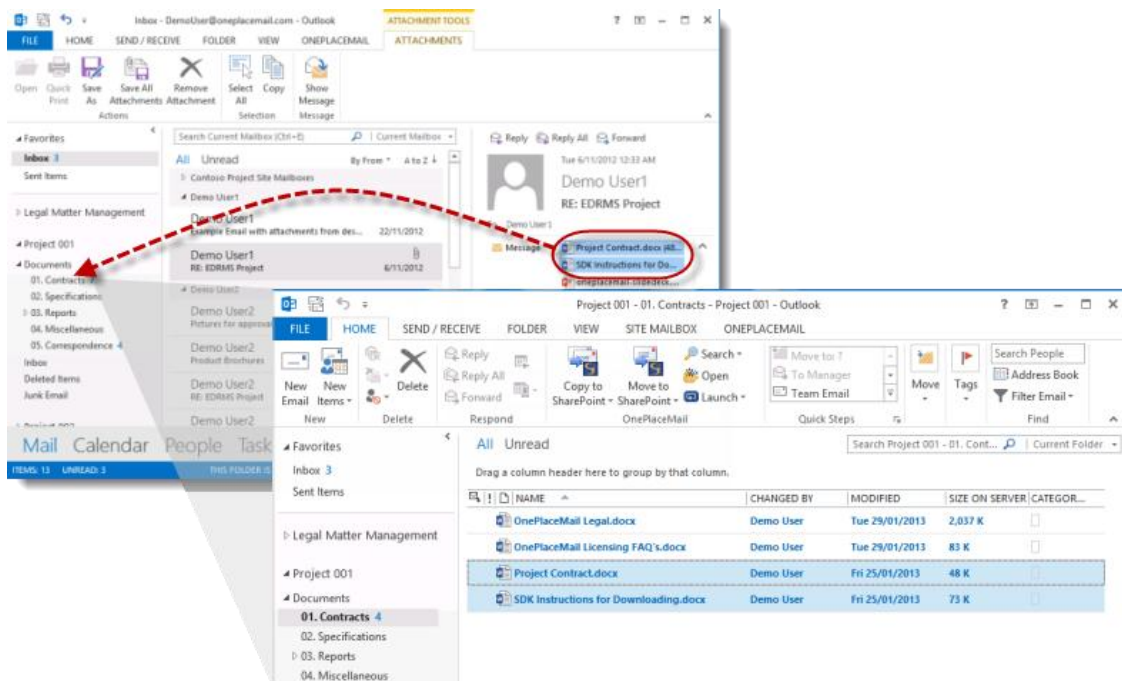


Image: Drag & drop email attachments to a SharePoint library, folder or document set within a Site Mailbox

This means users can save attachments for ease of access and management, while being confident that the critical source metadata (Email Sent Date, Received Date, To, From, etc...) is retained with the attachment

SharePoint 2013 Site Mailboxes

Overcome the Limitations of Site Mailboxes

Tag content with Custom Metadata

When saving emails or email attachments to Site Mailbox document libraries, there is no native support for tagging the content with custom metadata.

OnePlaceMail extends the Site Mailboxes to enable tagging of content with additional metadata. A user can simply drag & drop emails or email attachments as per the screenshot below into a Site Mailbox document library or associated folder and document set within the library. The 'Save to SharePoint' window appears, allowing the user to tag content appropriately with the required metadata. [Watch Video...](#)

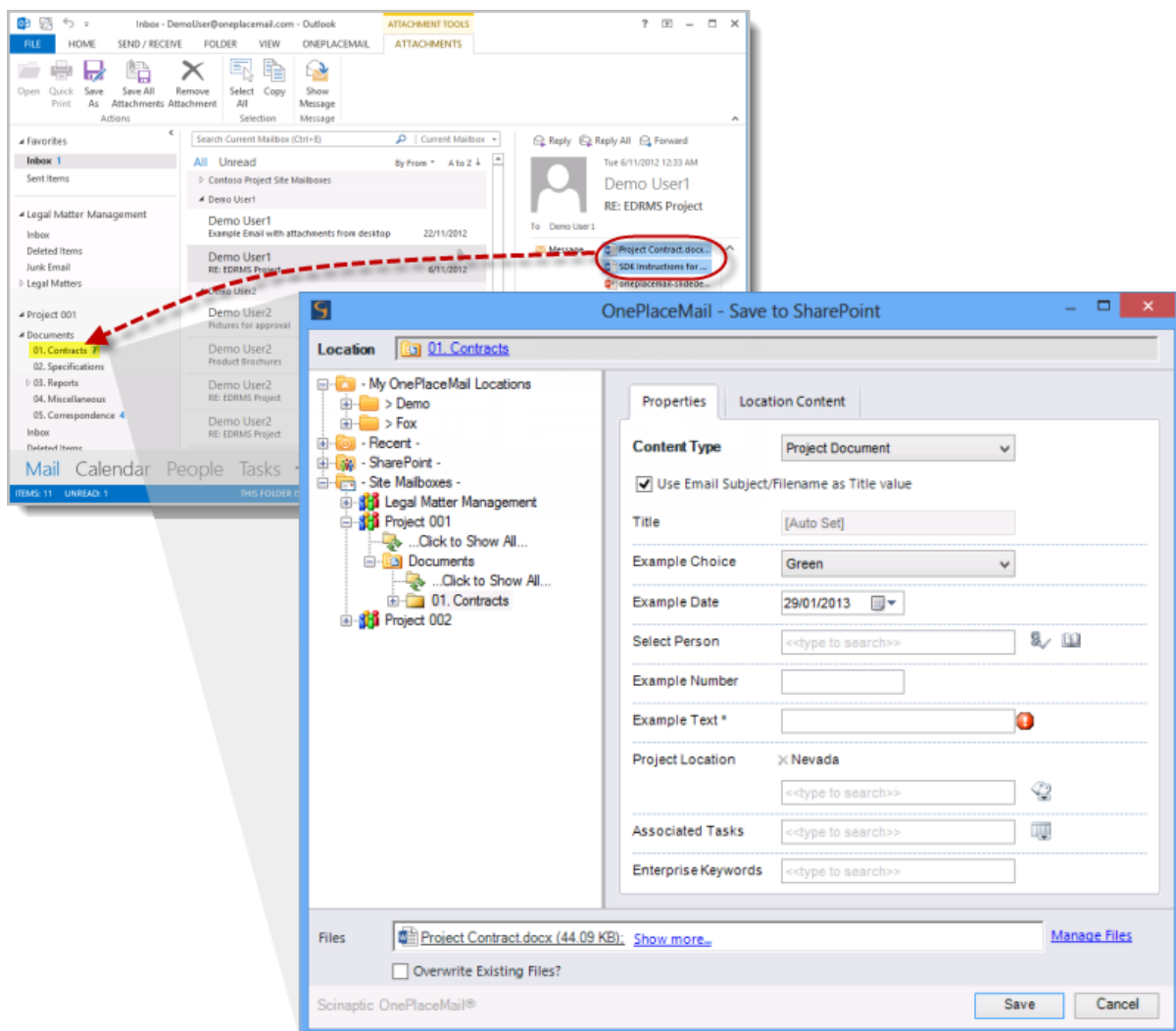


Image: Site Mailboxes – Tag content with additional metadata when saving to Site Mailbox SharePoint locations

Tip: OnePlaceMail further complements Site Mailboxes by allowing you to save emails and email attachments to SharePoint Lists. E.g. Events, Contacts, Tasks, Issues, Customer Lists.

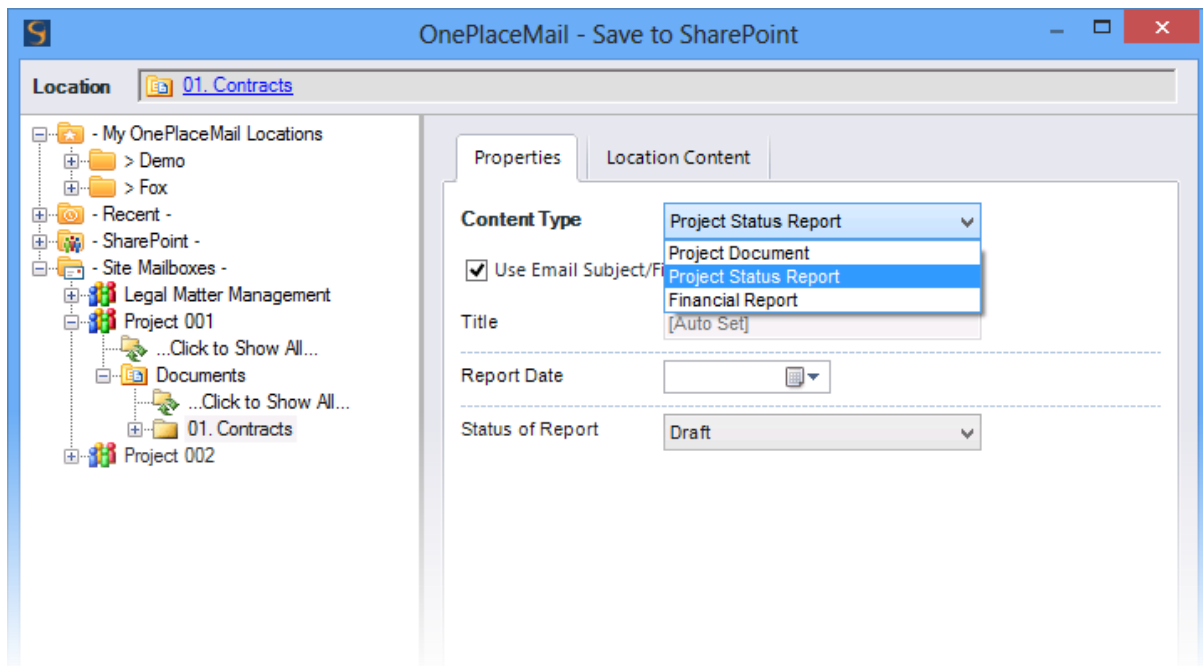
SharePoint 2013 Site Mailboxes

Overcome the Limitations of Site Mailboxes

Content Types

SharePoint document libraries often contain multiple content types. Content types allow for the appropriate capture of metadata, defining retention policies and associating business workflows. When saving to document libraries within Site Mailboxes, the user cannot select a content type and is therefore restricted to using the default content type defined for the save location.

OnePlaceMail extends Site Mailbox document libraries to provide the user an option of choosing a content type. Appropriate columns are presented based on the selected content type. Therefore, saved items can be managed according to any retention policies and workflow assigned to the content type.



Validation of metadata

When saving into document libraries using Site Mailboxes, any required columns or validation is not enforced. Therefore, content saved to SharePoint is checked-in with the required metadata missing.

OnePlaceMail has extended Site Mailboxes to enforce the validation of metadata prior to saving content within SharePoint.

Rename a file when saving to SharePoint

OnePlaceMail extends Site Mailboxes to provide the ability to rename files or email attachments when saving to SharePoint libraries.

In the familiar use case where you receive an email from someone with a renamed email attachment such as 'document_V2.docx', OnePlaceMail will allow you to replace or version (if enabled in the SharePoint library) the existing SharePoint item called 'document.docx'. Therefore, improving end user productivity and encouraging the use of SharePoint document management capabilities.

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Overcome the Limitations of Site Mailboxes

Integration with File Explorer or other Office applications

Microsoft Office (Word, Excel and PowerPoint)

OnePlaceMail extends the availability of Site Mailboxes through to Microsoft Office Word, Excel and PowerPoint. In the processes, this will encourage documents to be saved with metadata in SharePoint as opposed to being saved to the network drive. [Watch Video...](#)

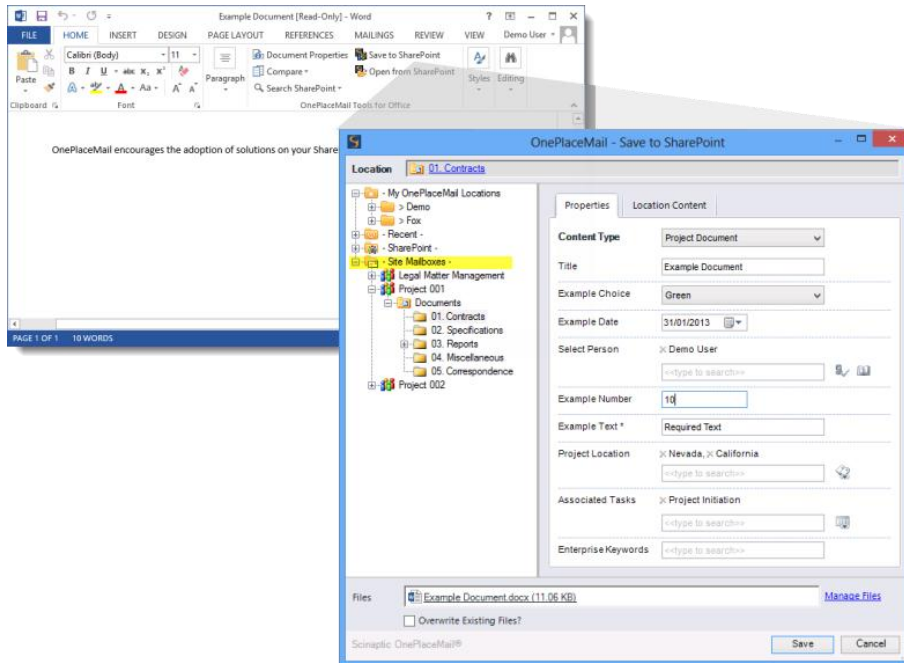


Image: Save documents from Word, Excel or PowerPoint directly to Site Mailboxes

Windows File Explorer

OnePlaceMail extends the availability of Site Mailboxes through to Windows File Explorer. Therefore, allowing you to save files from your network drive or desktop directly to a Site Mailbox document library.

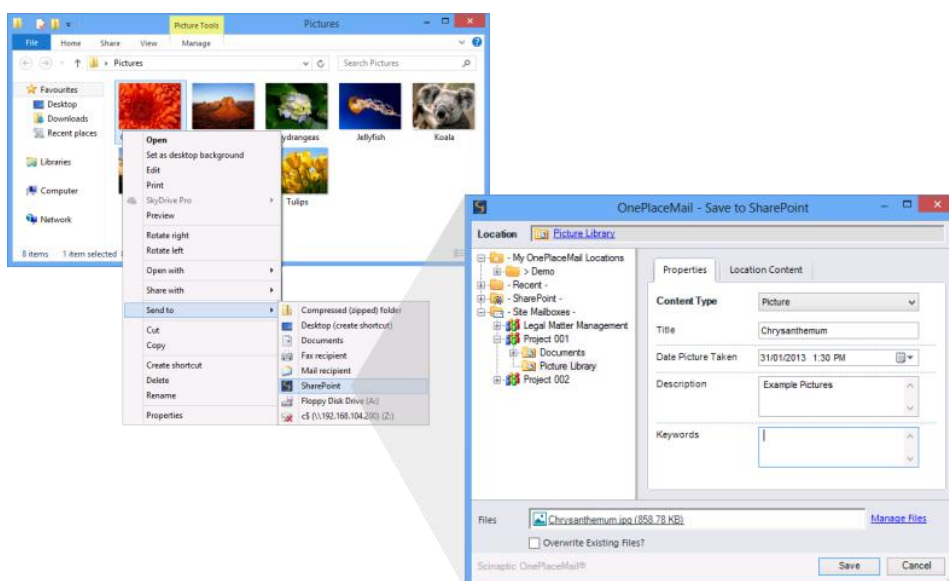


Image: Save from Windows File Explorer to SharePoint Site Mailboxes

SharePoint 2013 Site Mailboxes

Overcome the Limitations of Site Mailboxes

Accessing SharePoint capabilities from Site Mailboxes

Site Mailboxes provide the ability to view SharePoint documents from within Microsoft Outlook. The SharePoint content is displayed within Outlook in an Exchange Style view. Site Mailboxes synchronize enough information between SharePoint and Exchange to create these views. [Watch Video...](#)

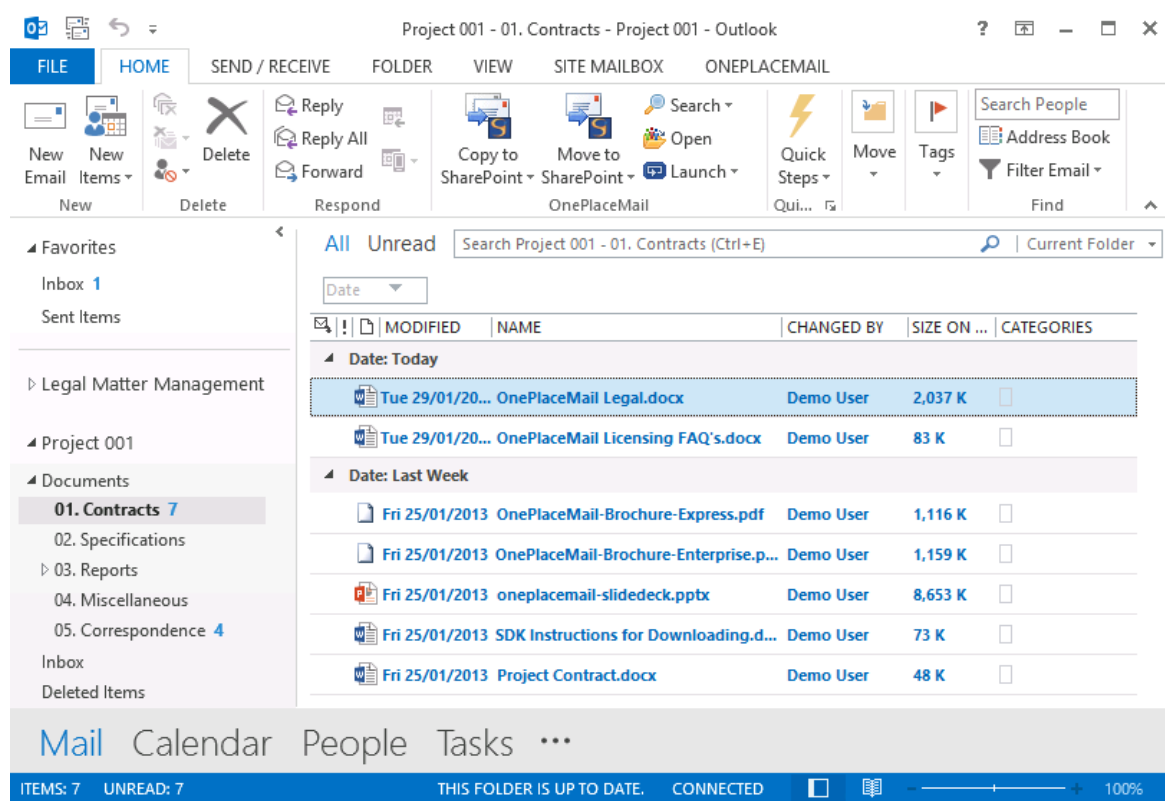


Image: Site Mailbox document Library view

OnePlaceMail extends Site Mailboxes to access the power of SharePoint by providing a new contextual ribbon tab called 'Site Mailbox'.

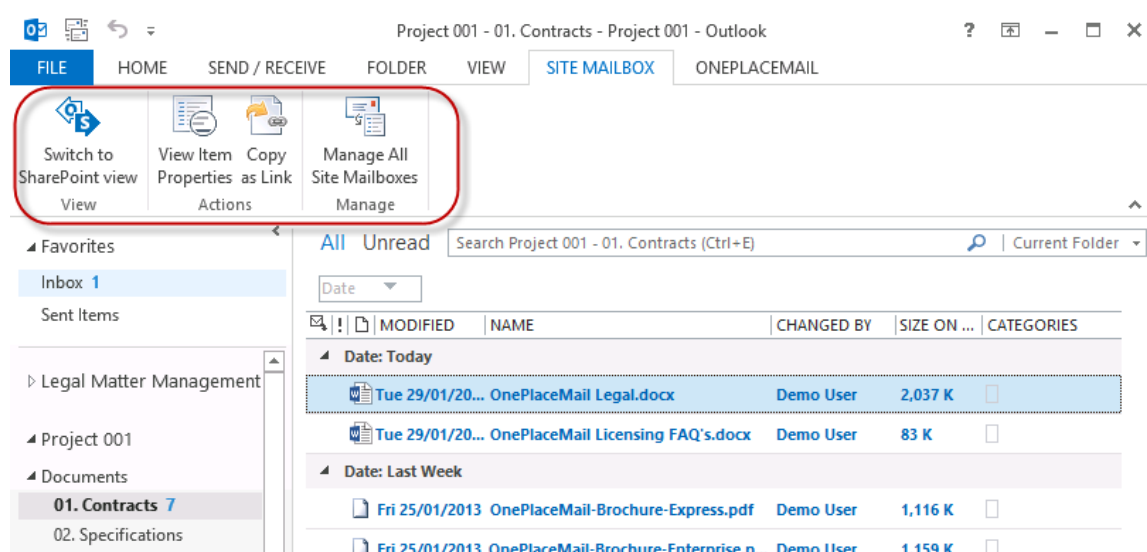


Image: Site Mailbox – Actions provided by OnePlaceMail

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Overcome the Limitations of Site Mailboxes

Switch to SharePoint View/Outlook view

The 'Switch to SharePoint' view will present the user with a SharePoint view within Microsoft Outlook. The current location is retained and the ability to toggle back to the corresponding Outlook view is provided.

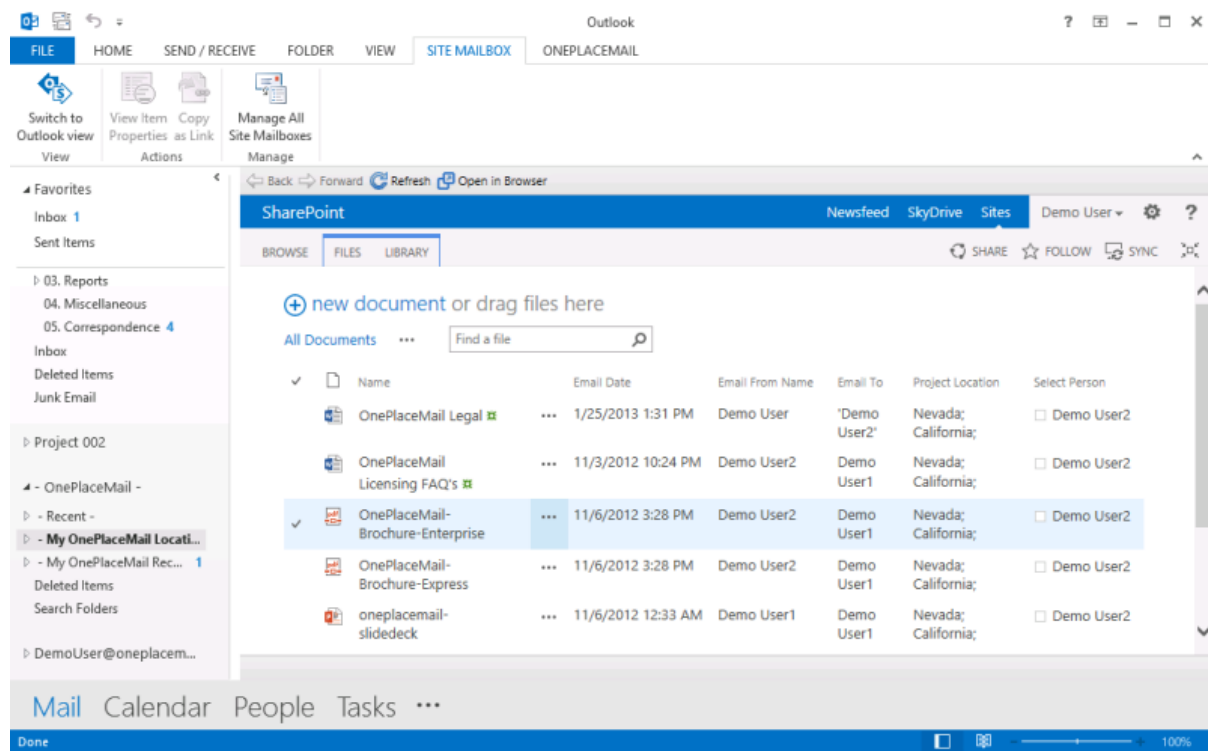


Image: Site Mailbox document library – SharePoint View with 'Switch to Outlook' button

The full capabilities of SharePoint, including access to different views, version history, metadata and any 3rd party solutions and customizations are now available within Microsoft Outlook.

SharePoint 2013 Site Mailboxes

Overcome the Limitations of Site Mailboxes

View/Edit Properties

When accessing document libraries within Site Mailboxes, there is no ability to access item properties of the selected item.

OnePlaceMail extends SharePoint Site Mailboxes to provide a 'View Item Properties' action on the Site Mailbox tab. When selected, the Item Properties for the selected item are presented in a browser window. This provides the ability to further edit the Item properties, view version history, start workflows and much more.

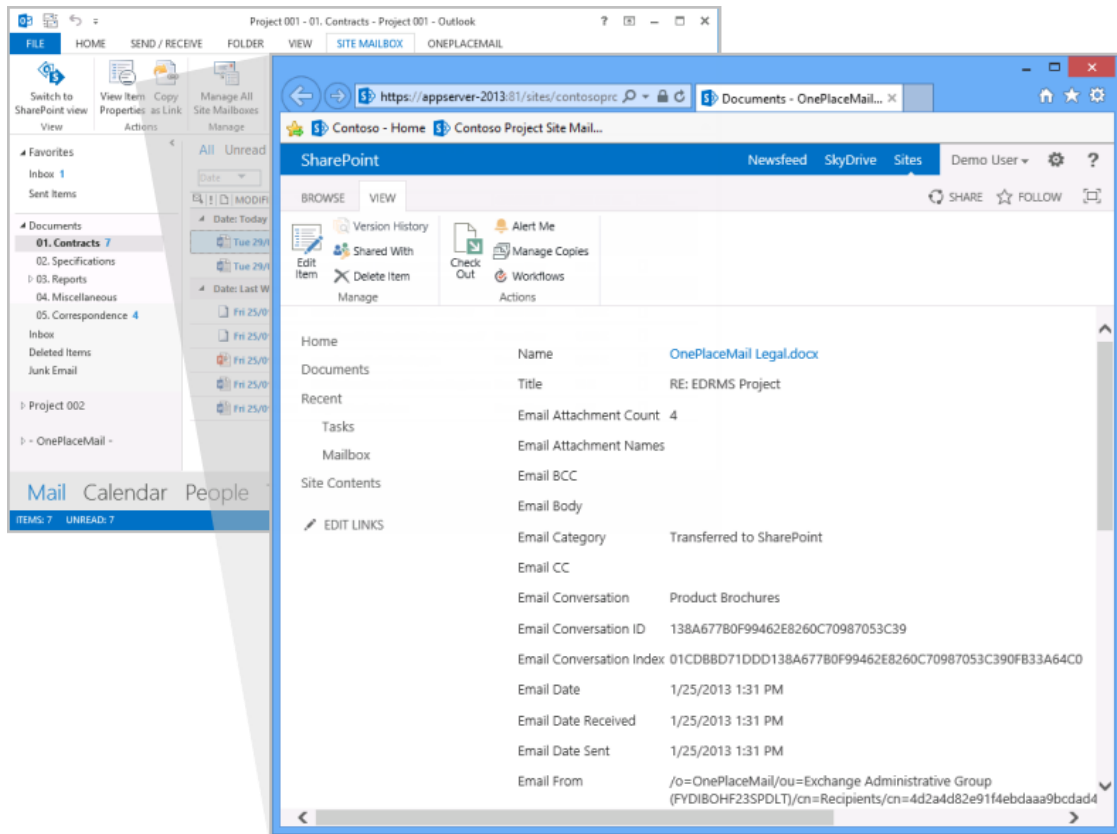


Image: View Item Properties for the selected item in the Site Mailbox Library

Copy as Link

The 'Copy as Link' action adds a link/url of the selected item to the clipboard.

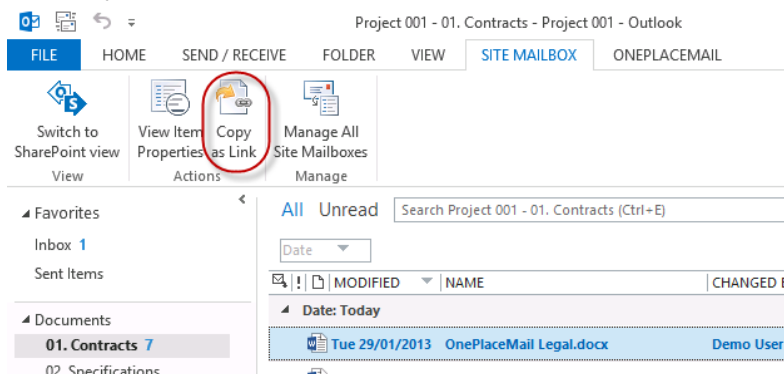


Image: Copy as Link places the link of the selected item on the clipboard

SharePoint 2013 Site Mailboxes

Overcome the Limitations of Site Mailboxes

Limited attachment and link management

Replace email attachments with links

When writing an email, it's common to attach a file from your network or local drive. OnePlaceMail allows the end user to seamlessly save these attachments to SharePoint and insert a link to the SharePoint items within the email message. This reduces large files being transferred across the network and also helps minimise duplicate copies of documents. [Watch Video...](#)

Support for Document ID when linking to content

Site Mailboxes do not support the SharePoint Document ID feature when sending links to SharePoint content. Therefore, if a SharePoint restructure is performed or documents are moved to the Records Center, links sent to the items will be broken.

If the Document ID feature has been enabled in SharePoint, OnePlaceMail provides the ability to insert links to documents using the Document ID.

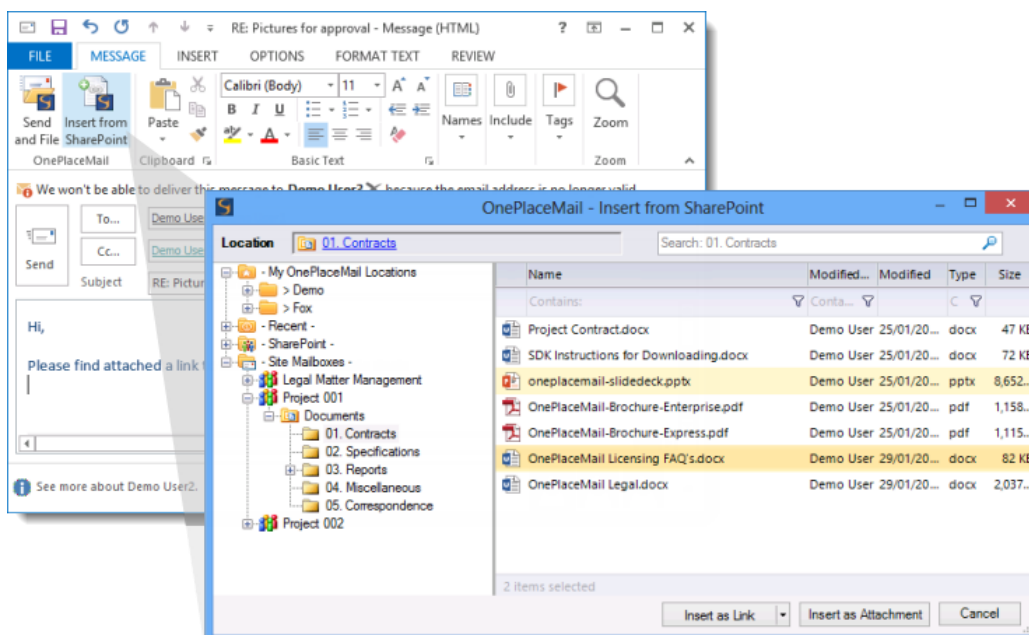


Image: Insert from SharePoint

SharePoint 2013 Site Mailboxes

Overcome the Limitations of Site Mailboxes

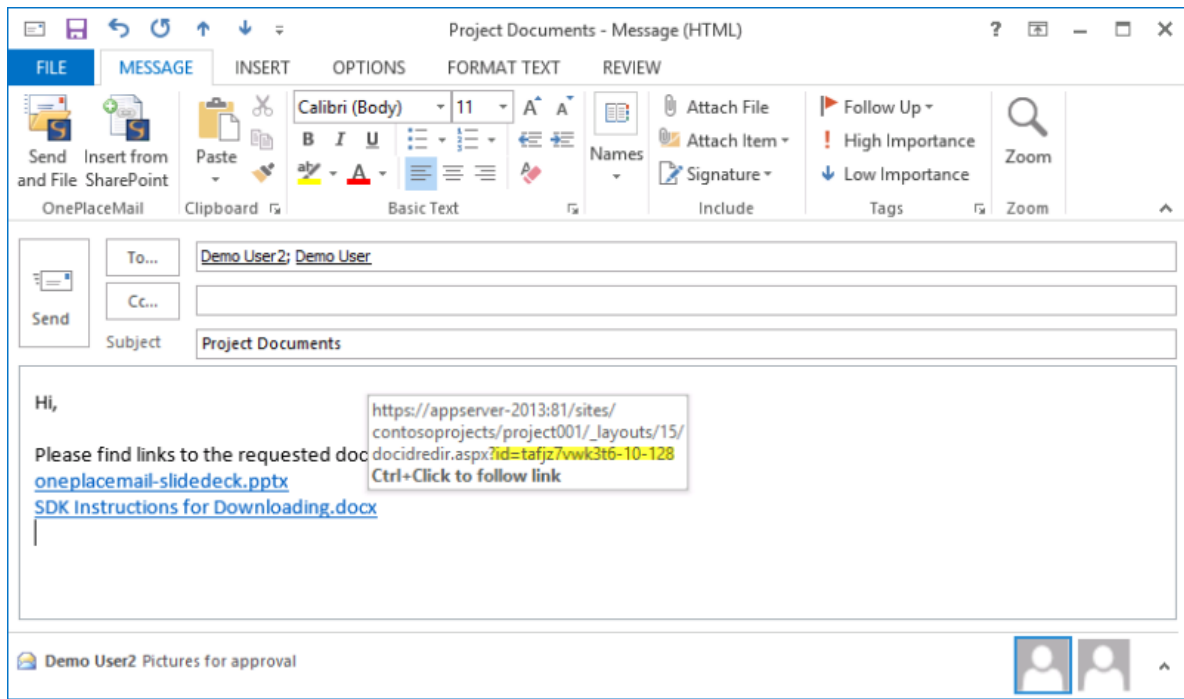


Image: Links using the SharePoint Document ID

Insert attachments when sending to external recipients

In addition to inserting links, attachments can also be included where you have a requirement to send content to external recipients. OnePlaceMail allow you to browse or search for content to insert as attachment or links.

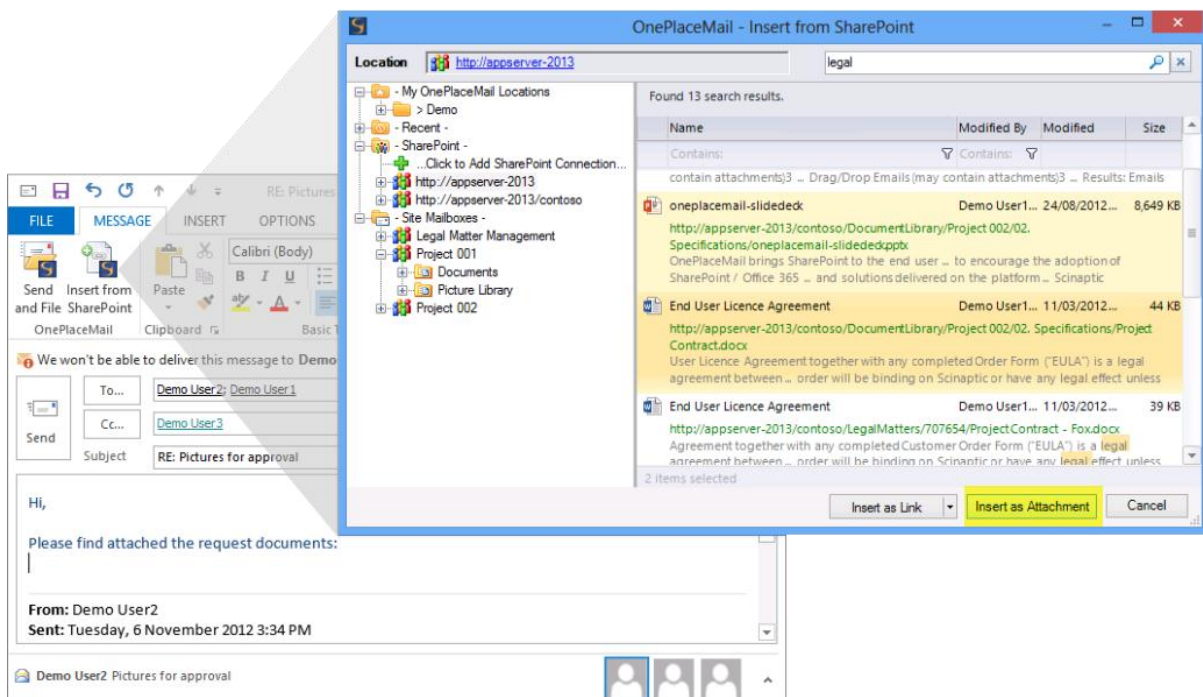


Image: Search or Browse and insert attachments and links

Complementing Site Mailboxes

OnePlaceMail complements Site Mailboxes with many additional capabilities. A couple of examples are provided below.

Intelligent saving of content to SharePoint

When saving content to SharePoint, OnePlaceMail provides the option on a location by location basis to either:

- a. Prompt the user to tag content with additional metadata, or
- b. Perform an automatic save to SharePoint/never prompt (assuming there are no required columns)

When saving to a SharePoint location, OnePlaceMail uses or presents the default content type of the select location. OnePlaceMail provides further intelligence when filing to allow the automatic selection of an alternate content type based on whether you're saving email messages as opposed to email attachments.

The intelligent filing options provided by OnePlaceMail, in combination with Site Mailboxes and the ability to configure available content types and their order at a library, document set or folder level within SharePoint, ensures you have flexibility in designing your solutions.

Send and file to SharePoint

OnePlaceMail complements Site Mailboxes with a 'Send and File' facility. This is available using the ribbon button provided in Outlook and is also available as part of the standard 'Send' process. The 'Send and File' has been extended to include Site Mailbox SharePoint locations.

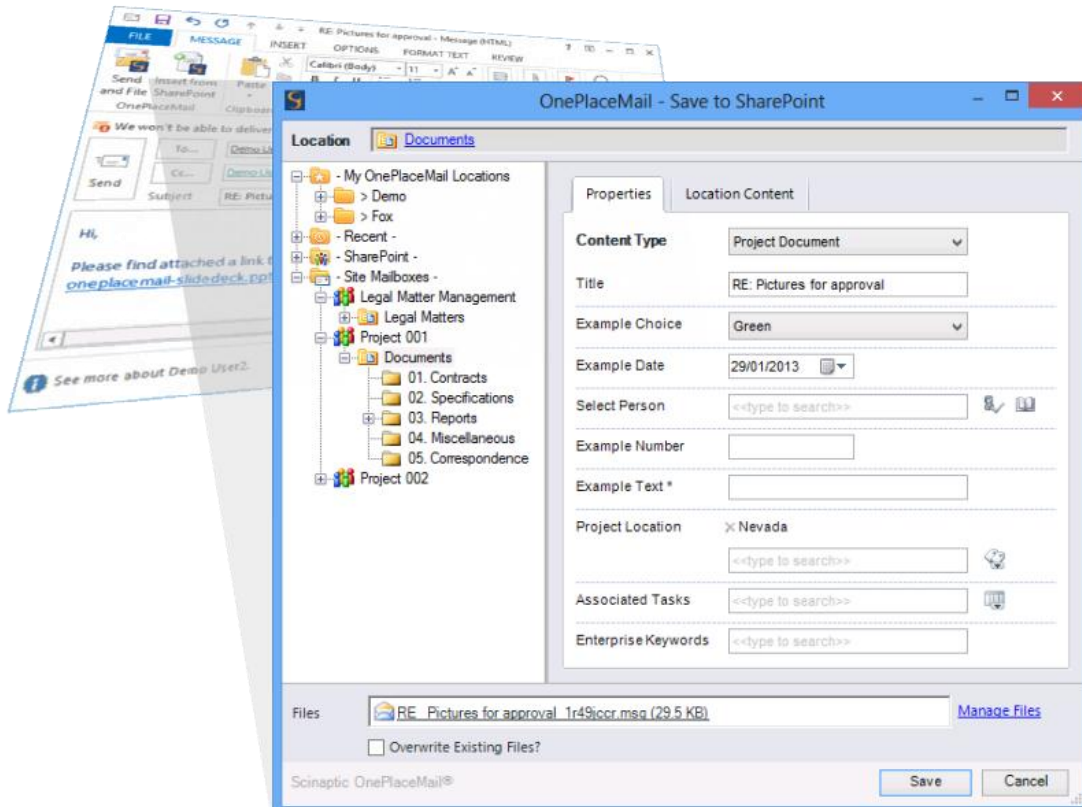


Image: Send and File emails into SharePoint Site Mailboxes

Get Started with OnePlaceMail and Site Mailboxes

1. Install OnePlaceMail

Free - OnePlaceMail Express Edition



OnePlaceMail Express Edition is free for up to 25 users.

The OnePlaceMail Express Edition is a feature rich solution for saving content from Outlook and Windows Explorer to SharePoint. This includes support for SharePoint on-premise and Office 365.

The Express Edition also provides the ability to tag content and access the full power of SharePoint from within Microsoft Outlook, including Site Mailboxes (if running Outlook 2013).

[Install the free OnePlaceMail Express Edition](#)

Available for Outlook 2013, 2010 and 2007.

Trial - OnePlaceMail Enterprise Edition



OnePlaceMail Enterprise Edition is the licensed offering.

In addition to all the capability provided in the express edition, OnePlaceMail Enterprise provides extended capabilities, support for Office (Word, Excel and PowerPoint), enterprise deployment options and premium level support.

[Download a OnePlaceMail Enterprise Trial](#) (30 day trial)

Stay Connected

Connect with the OnePlaceMail team and stay informed of upcoming announcements

1. Twitter @OnePlaceMail
2. LinkedIn: <http://www.linkedin.com/company/scinaptic-oneplacemail>
3. OnePlaceMail Community: <http://community.scinaptic.com/oneplacemail>
4. Website: www.scinaptic.com

2. Implement Site Mailboxes

Site Mailboxes require both Microsoft SharePoint 2013 and Microsoft Exchange 2013 installed and configured for using the Site Mailboxes. In addition, Microsoft Outlook 2013 is required for 'bringing together' the Site Mailbox concept from an end users perspective.

There are 2 basic steps to start using Site Mailboxes:

1. Site Mailboxes Configuration
2. Provisioning Site Mailboxes

On-premise

For an on-premise environment, you require the implementation of both SharePoint 2013 and Exchange 2013. In addition, you're required to complete the prerequisite Site Mailboxes Configuration as described in the 'Site Mailbox Configuration' article below.

Site Mailboxes Configuration

Site Mailboxes Configuration: [How do I prepare my environment for SharePoint Site Mailboxes?](#)

Once your environment has been configured to use Site Mailboxes, you can provision Site Mailboxes for your SharePoint sites as described in the 'Provisioning Site Mailboxes' article below.

Provisioning Site Mailboxes

Step by step guide to provisioning your first Site Mailbox: [How do I provision Site Mailboxes in SharePoint 2013.](#)

Office 365

Microsoft SharePoint Online, part of Office 365, provides an environment with the Site Mailbox Configuration already completed. Therefore, allowing the immediate 'Provisioning of Site Mailboxes'.

Provisioning Site Mailboxes

Step by step guide to provisioning your first Site Mailbox: [How do I provision Site Mailboxes in SharePoint 2013.](#)

Tip: Start an Office 365 trial to test site mailboxes with minimal effort at: <http://www.microsoft.com/office365> or during the Microsoft SharePoint 2013 preview period: <http://www.microsoft.com/office/preview/en/office-365-enterprise>

The following article contains a number of FAQ's and will help '[Prepare for using site mailboxes in Office 365](#)':

Compare [SharePoint Online](#) subscriptions with the feature matrix (Search for Site Mailboxes)

Key Takeaways

The decision to use Site Mailboxes, OnePlaceMail or to extend Site Mailboxes with OnePlaceMail will be purely based on your business needs and the relevant technical/functional limitations of the solutions. The key message is, you have a choice.

OnePlaceMail has been designed to function as both a stand-alone offering and also with Site Mailboxes to seamlessly complement and extend their capabilities. This seamless integration helps ensure the benefits and capabilities of both OnePlaceMail and Site Mailboxes. You can implement OnePlaceMail now, knowing any future use of Site Mailboxes will work using the same, familiar metaphor within Microsoft Outlook as being used by OnePlaceMail.

References

1. [Prepare for using site mailboxes in Office 365](#)
2. [Overview: Use a site mailbox to collaborate with your team](#)
3. [Use a site mailbox to collaborate on documents](#)
4. [Use a site mailbox to coordinate team email](#)
5. [Add a site mailbox to keep email in context](#)
6. [Access project emails and documents from one place](#)
7. [What's new in eDiscovery in SharePoint Server 2013](#)
8. [What's new in records management and compliance in SharePoint Server 2013](#)
9. [SharePoint Online](#)