

## The Email to SharePoint Connector



01

### Emails and Attachments (Records)

#### Increase Compliance, Realize Time & Cost Savings

Storing emails and attachments in a centralized repository like SharePoint Online instead of leaving them in Outlook:

- Is critical for records management, governance & compliance
- Strengthens knowledge management and collaboration
- Improves data quality with classified and tagged information
- Drive user adoption of SharePoint, further leveraging your investment in Microsoft 365



02

### Tagging, Labelling & Automation

#### Save Emails to SharePoint from Within Outlook

- Quickly and easily file emails and attachments to SharePoint Online without leaving Outlook
- Empower users to save and auto-apply meta-data and retention labels to emails compliantly. No app-switching necessary
- Auto-file emails on a recurring basis



03

### SharePoint (Adhering to RM Policy)

#### Search and Share Emails from SharePoint

- Email SharePoint content as links for easy collaboration and file-sharing with team members
- Quickly search across SharePoint right from Outlook for opening or sending files with ease
- Find and open files in SharePoint and Teams right from Colligo's Outlook app

## Filing

- File email and attachments to SharePoint Online, Teams, and OneDrive
- Automatically file emails and attachments on a recurring basis
- File singular emails (up to 20 at a time) or in bulk (batches)
- Save attachments either as part of the email file, or as separate files
- Configure default actions to move or copy emails
- Support for Pinned (Favourite) Locations for quick email filing
- Smart conflict resolution to prevent duplicate names for emails and attachments
- Send and save: file an email to SharePoint as it is sent

## Classification

- Automatically extract email metadata and/or manually capture custom fields
- Ability to hide non-required fields when tagging metadata
- Support for customized and managed metadata (taxonomies and keywords) and person/group metadata

## View

- Browse SharePoint, Teams, and OneDrive

## Search

- Search SharePoint, Teams, and OneDrive for files or folders

## Share

- Email SharePoint content as attachments in an email
- Email attachments from SharePoint as links to prevent multiple copies of the same content

## Central Administration

- Centralized and simplified deployment via the Microsoft 365 add-in framework
- Admin capabilities to push sites, policies and streams (libraries) to users

## Authentication

- Microsoft 365, Azure AD (Entra)

## System Compatibility

- Outlook desktop for Mac or Windows (both Classic and New Outlook), Outlook Online or Outlook App on mobile devices
- SharePoint Online

## Language

- English and French

## Multi-cloud/Platform

- SharePoint Online, Teams and OneDrive