

SharePoint 2013: Better for Document Management?

From a Document Management perspective, SharePoint 2010 was a major advance over SharePoint 2007, but SharePoint 2013 is a much more incremental step forward from SharePoint 2010. This paper looks at two new features of SharePoint 2013 – searching based on FAST (a definite improvement) and drag and drop saving of emails and attachments (which is disappointing).

Searches Based on FAST Technology ✓

The most significant DM improvement with SharePoint 2013 is related to FAST search. Once an expensive add-on for SharePoint, FAST search is now embedded in SharePoint 2013, so that all searching is based on FAST technology.

MacroView DMF already supports FAST Search and existing MacroView DMF Search Panels will continue to operate in SharePoint 2013.

Saving Emails by Drag and Drop ✗

You may well have heard that (provided you have Exchange 2013) you can drag and drop to save from Outlook 2013 to Site Mailboxes. This suggests that you can drag and drop to save emails and attachments to SharePoint 2013, but this is NOT really the case. Various shortcomings of the Site Mailbox mechanism of SharePoint 2013 are listed below. In summary Site Mailboxes do not remove the need for MacroView DMF or MacroView Message as a user-friendly means of saving emails and attachments to SharePoint.

Shortcomings of Site Mail Boxes in SharePoint 2013

- When you drag and drop to a Site Mailbox attachments are stored in SharePoint, but the email bodies are actually stored in Exchange. This significantly complicates archiving / retention.
- As attachments are saved to SharePoint the default Content Type for the destination library is selected automatically – you cannot choose a Content Type.
- There is no provision for changing the name of an attachment as it is saved to SharePoint via the Site Mailbox mechanism.
- Additional metadata is not captured or synchronized for attachment documents.
- Email attributes such as *To*, *From*, *SentOn* etc. are not stored in in SharePoint.
- If any metadata columns are required the newly saved attachment documents will be left checked out (and invisible to other users) until the user who saved it (or an administrator) uses the web browser UI to edit and complete the metadata.
- Dragging a document that already exists will result in error - there is no provision for versioning or overwrite.
- There is a maximum of 10 Site Mailboxes for a user's Outlook environment.
- Email duplication is not checked so multiple recipients dragging / dropping / saving the same email will cause duplicates (unlike MacroView DMF).
- Emails are not searchable WITH documents but can be searched from the 'view' of mailbox in the SharePoint UI. By contrast, an Email Search in MacroView DMF or MacroView Message will find emails based on content in their attachments.