

## Drag&DropIt

# Drag and Drop emails directly into your SharePoint Document Library

- **Email management using SharePoint**
- **Drag and drop emails into Document Library folders**
- **Create Document Library folders under your email inbox**
- **Easily search for your document folder when saving**

# Drag and Drop emails into your Document Library in SharePoint - Email management

The ability for users of Microsoft's SharePoint Portal to save emails directly into their document library is a great addition to the functionality that SharePoint already provides. The SharePoint Solutions Centre offers a great SharePoint utility that allows users of SharePoint to save emails from their email inbox directly into the Document Library.

The following brochure shows how this simple software ad-on can be used to create a complete and functional email management system. The simple addition of this software will allow for the creation of a SharePoint menu in your Office application and from here you can create document folders under your inbox and drag and drop emails to be saved directly into your document library.

The new SharePoint menu will allow you to save your emails into the SharePoint Document Library, under the folder that you want.

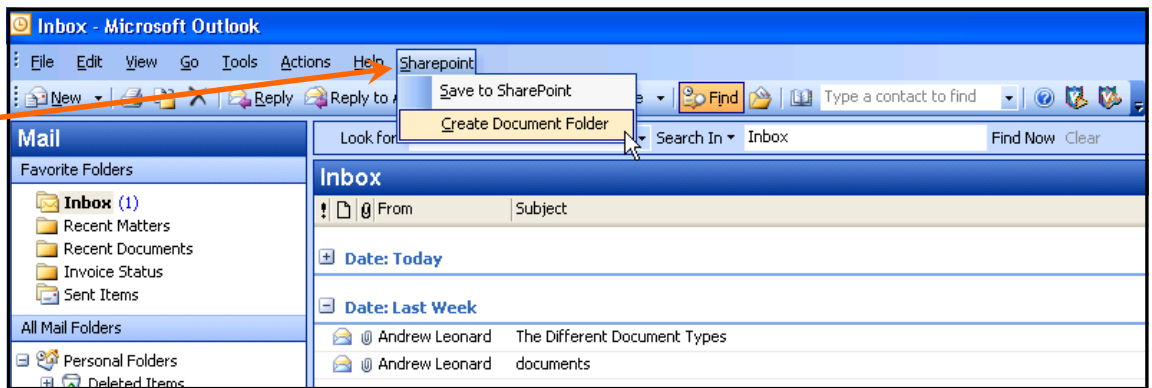


Figure 1.0 - Microsoft Office with SharePoint Solution Center's software add-in of the SharePoint menu tree, with the option to save directly into the SharePoint Document Library.

## Creating Document Library folders for your email

After selecting to create a new document folder under your SharePoint menu a profile box will appear asking you to create the folder.

The created document folder will sit just under your inbox in your Outlook email.

If you press on the Doc Folder button a new pop up will appear providing a search facility to find the document folder you require.

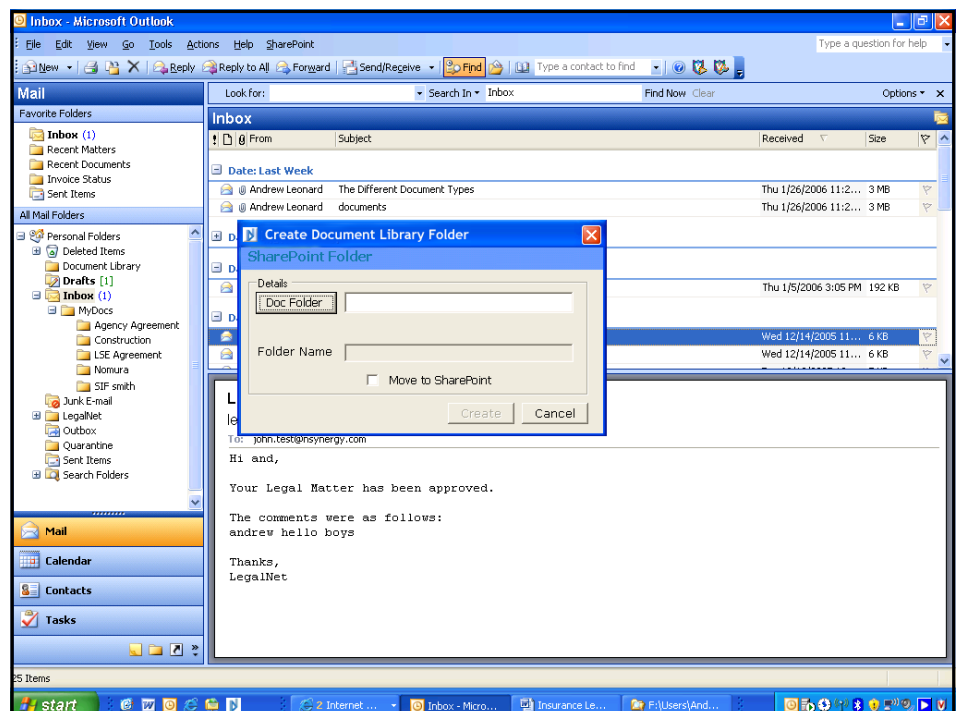


Figure 2.0 - Creating a Document Folder under your email inbox.

## Create Document Library folder profile form

Figure 3.0 shows a close up of the Create Document Library Folder profile form. From here you can select the Doc Folder button which will allow for you to search for the folder using the Document Folder Lookup pop-up.

Selecting the Move to SharePoint check box will allow any email dropped in your created folder completely removed from your inbox and left in the Document Library in SharePoint. You will be able to retrieve this email from your inbox when necessary.

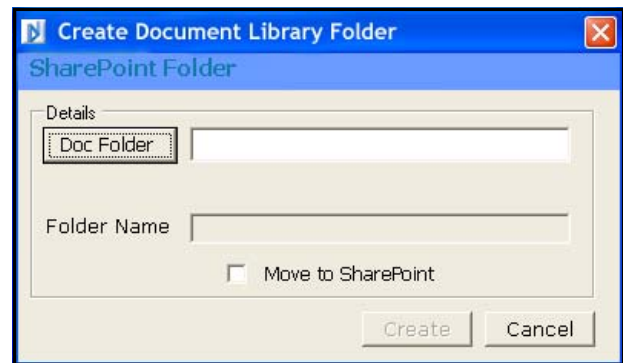


Figure 3.0 - Create Document Library profile form.

## Searching for document folders

Figure 4.0 shows the Document Folder Lookup screen. From this screen you can choose the Document Folder from the Document Library that you want.

If the Document Folder that you desire is not visible on the screen, then you can use the Search facility at the top of the screen. Here you can type in any of the text in the folder name and the search will produce the folder or folders that the text relates to.

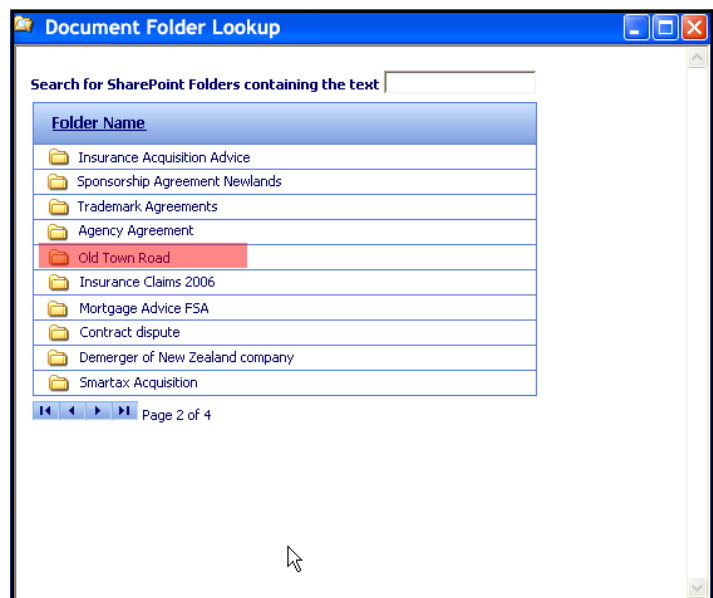


Figure 4.0 - Document Folder Lookup Form.

## Creating Document Folders

Figure 5.0 shows the simplicity of creating a document folder in Outlook.

When a document folder is created it quickens the process of saving emails to the document library significantly.

When a user no longer needs to view the document folder under their inbox they can simply delete the folder. The information and the folder will not be lost with all the emails and documents remaining in the document library.

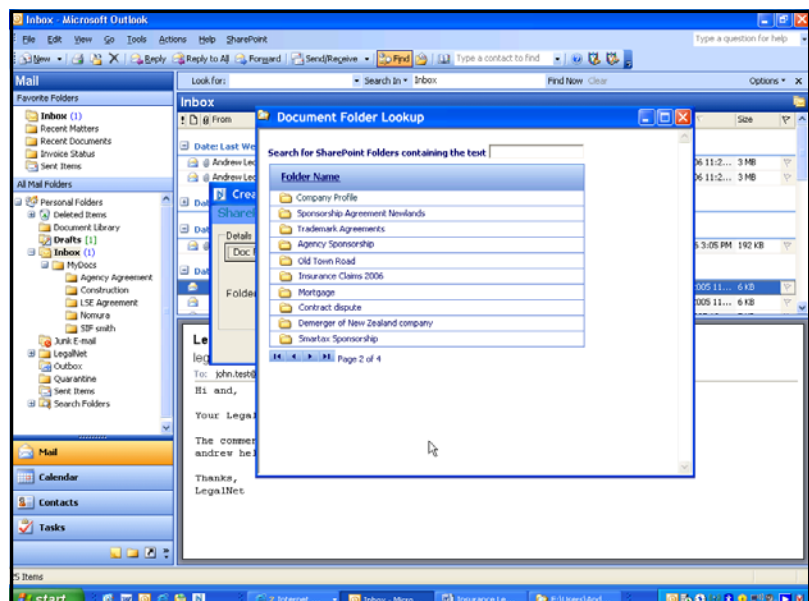


Figure 5.0 - Save to Document Library profile form your email inbox.

## Save email to the Document Library

Figure 5.0 shows an alternative way of saving emails to your Document Library if you haven't created a document folder.

This profile screen simply requires you to process profile screen that includes that ability for users of this add-in to save meta data against their document.

Figure 6.0 - Save to Document Library profile screen for saving emails.

## Drag and drop your email

Now once the document folder has been created all that you need to do is to start dragging and dropping your emails into the folder you desire.

In figure 7.0 we are dropping the Kardinia Park Environment Clean Up email directly into our already created Old Town Road Document folder.

You will be able to search and view your documents and emails in this folder through the document library.

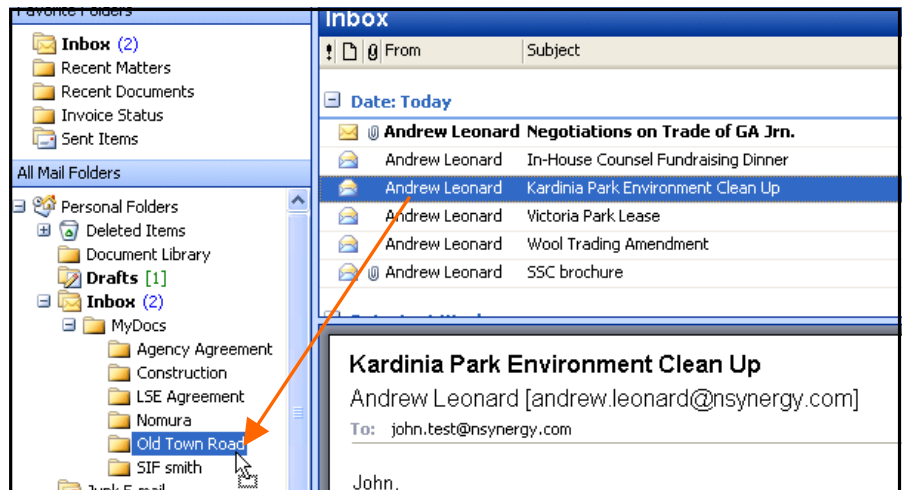


Figure 7.0 - Dragging and dropping emails in document folders.

## More from the SharePoint Solutions Centre



- Save Documents directly into your SharePoint Document Library.
- Need to transfer documents straight into your Document Library? Try our simple document upload solution that will do it all automatically for you.
- Integrate your email system straight into SharePoint. View your Document Library through your email.

### Contact Details

For additional information regarding SSC, or for a demonstration of the software please contact us at [info@sharepointsc.com](mailto:info@sharepointsc.com)



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