

Colligo Contributor Add-In for Outlook 4.4

User Guide



CONTENTS

Introduction	2
Benefits	2
Key Features.....	2
Platforms Supported.....	2
Installing and Activating Contributor Add-in for Outlook.....	3
Activating Contributor Add-in for Outlook Manually	4
Using the Contributor Add-in for Outlook Control Panel	5
Checking for Updates.....	5
Updating Your License Key.....	5
Adding SharePoint Lists and Libraries to Outlook.....	6
Using the SharePoint Sites dialog in Outlook	6
Using the Connect to Outlook Button in Internet Explorer	8
Viewing Lists and Libraries in Outlook	9
Configuring your Synchronization Settings.....	10
Synchronizing Content Manually	11
Completing a Full Synchronization.....	11
Filing Items to SharePoint Folders	12
Dragging-and-Dropping Emails	12
Move Versus Copy	12
Sending-and-Filing Emails	13
Using the Copy Folder	14
Working with Content in Cached Mode	15
Creating New Content.....	16
Uploading Existing Content.....	17
Setting Default Metadata	18
Using the Colligo Attachment Manager.....	19
Uploading an attachment to SharePoint	19
Inserting a Link to a Document in SharePoint	20
Setting Attachment Rules	22

INTRODUCTION

Welcome to Colligo Contributor Add-in for Outlook, the simple and effective way to increase adoption of SharePoint for email and attachment management. It delivers a cost effective and intuitive way to upload content to SharePoint and browse document libraries and lists — all from within the Microsoft Outlook interface. Users can click the Send & File button or simply drag-and-drop emails and attachments into document libraries and folders, instantly capturing critical metadata. The built-in Attachment Manager easily stores email attachments in SharePoint, replacing them with links.

Benefits

- Empower users to easily manage email and documents in SharePoint
- Increase the quantity of content captured and tagged in SharePoint
- Make SharePoint accessible directly from Outlook
- Drive mobile and remote workforce productivity with easy offline access
- Improve collaboration, and document project management
- Reduce risk and improve compliance

Key Features

- Save content to SharePoint libraries with metadata prompt and automatic extraction of email metadata
- View SharePoint content in Outlook, online and offline
- Navigate through SharePoint site using the Outlook folder tree
- Update documents from Outlook folders
- Use content types and forms in Outlook
- Set content types for list items

Platforms Supported

- SharePoint Server 2010, MOSS 2007 and SPS 2003; SharePoint Foundation and WSS (2.0 or 3.0); SharePoint 2010 Online (Office365) and BPOS
- Windows XP, Windows Vista, or Windows 7
- Microsoft Office 2003 – 2010 (Office 2003 SP2 or later for InfoPath forms)

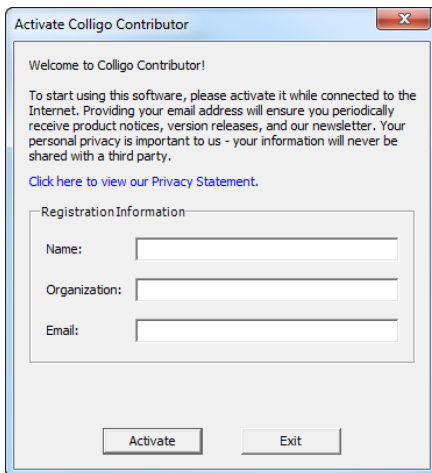
NOTE: The screenshots in this document use Outlook 2010, SharePoint 2010, and Windows 7. Your user interface may differ depending on your specific configuration.

INSTALLING AND ACTIVATING CONTRIBUTOR ADD-IN FOR OUTLOOK

NOTE: Microsoft Outlook must be closed for the installation to be successful.

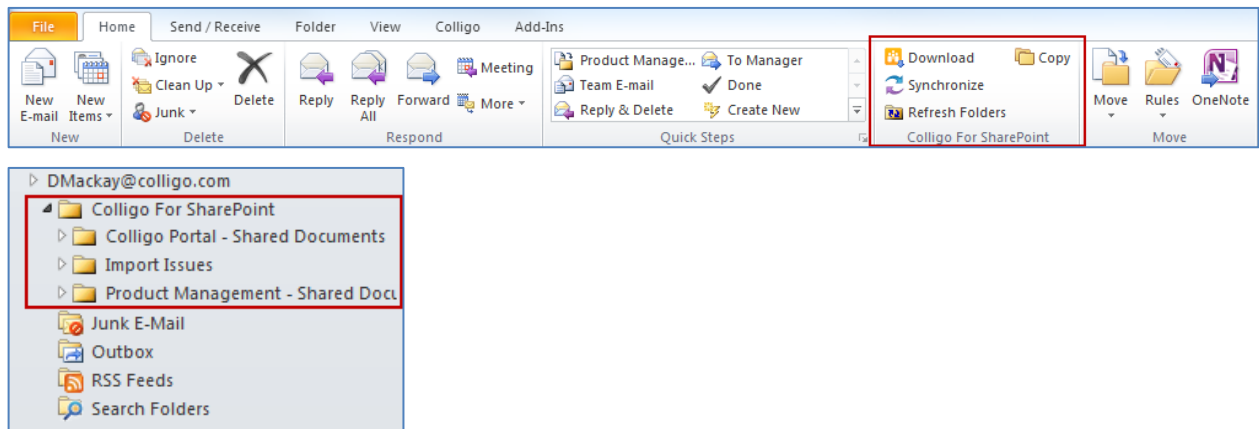
To install and activate Contributor Add-in for Outlook:

1. Double-click to open the zip file and extract the contents.
2. In the folder, double-click the folder that corresponds to your operating system:
 - a) **x64:** choose this option if you have a 64-bit operating system
 - b) **x86:** choose this option if you have a 32-bit operating system
3. Double-click either Setup.exe or .msi.
4. Follow the steps in the install wizard.
5. After the install is complete, the following dialog displays:



6. Enter your information and click **Activate**. If you do not activate Colligo Contributor Add-in for Outlook, the add-in does not display.

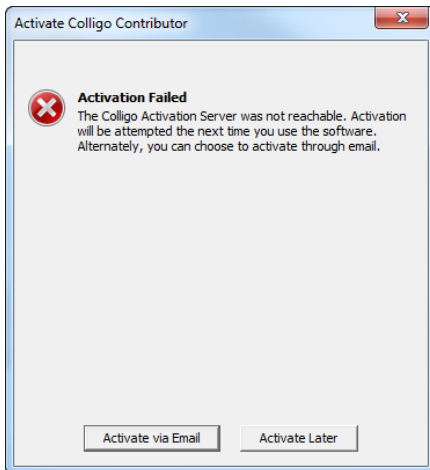
After Contributor Add-in for Outlook is installed, a new group called **Colligo for SharePoint** displays in the Outlook folder tree and in the Home ribbon:



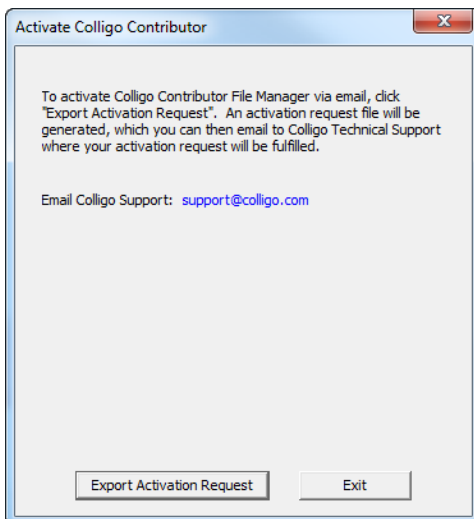
You can now connect SharePoint lists and libraries to your Outlook folder tree.

Activating Contributor Add-in for Outlook Manually

If you are unable to connect to the activation server, the following error message displays:



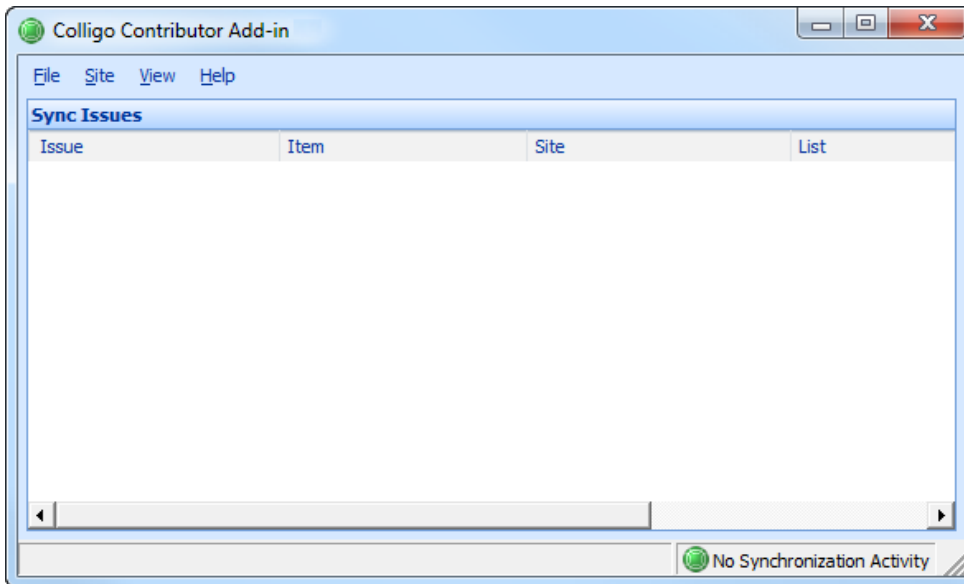
Click **Activate via Email** to create an activation request file. The following dialog displays:



Click **Export Activation Request**. This creates a .txt file that you can save anywhere on your machine, and then attach to an email that you can send to Colligo to request a manual activation.

Using the Contributor Add-in for Outlook Control Panel

The second interface component of Contributor Add-in for Outlook is called the Control Panel. This interface allows you to set your synchronization settings, and view any Sync Issues.



Checking for Updates

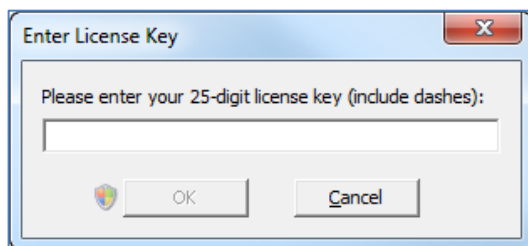
In the Add-in Control Panel, you can check if you are using the most current version of Contributor Add-in for Outlook. Click the **Help** menu and select **Check for Update**.

The www.colligo.com site launches in your web browser. If there is a newer version available, click the **Download the latest version now** link to install the newer build.

Updating Your License Key

In the Add-in Control Panel, you can change your license key. Click the **Help** menu and select **Install License Key**.

The **Enter License Key** dialog displays. Enter your new license key and click **OK**.



ADDING SHAREPOINT LISTS AND LIBRARIES TO OUTLOOK

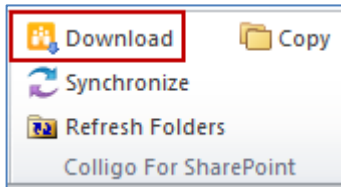
You can add a SharePoint list or library to Contributor Add-in for Outlook in one of two ways:

1. By using the **SharePoint Sites** dialog in Outlook.
2. By using the **Connect to Outlook** button in Internet Explorer.

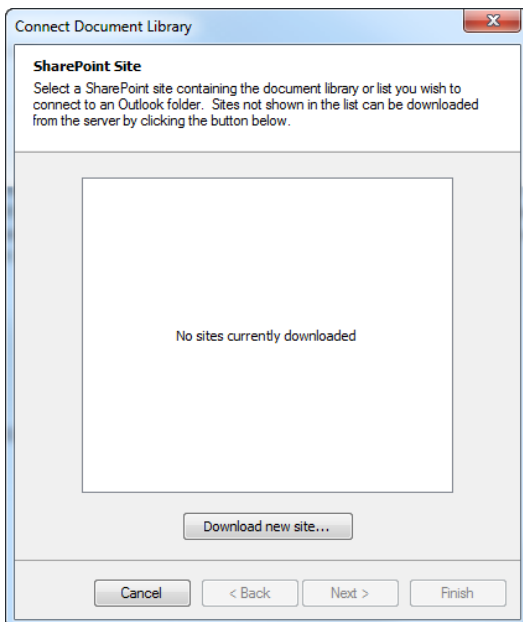
Using the SharePoint Sites dialog in Outlook

To connect a site from within Outlook:

1. Click the **Download** icon in the **Colligo For SharePoint** group in the **Home** ribbon in Outlook.

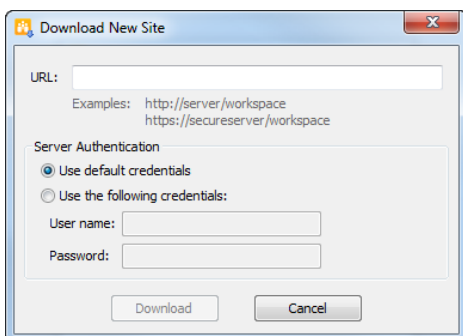


The **Connect Document Library** dialog displays:



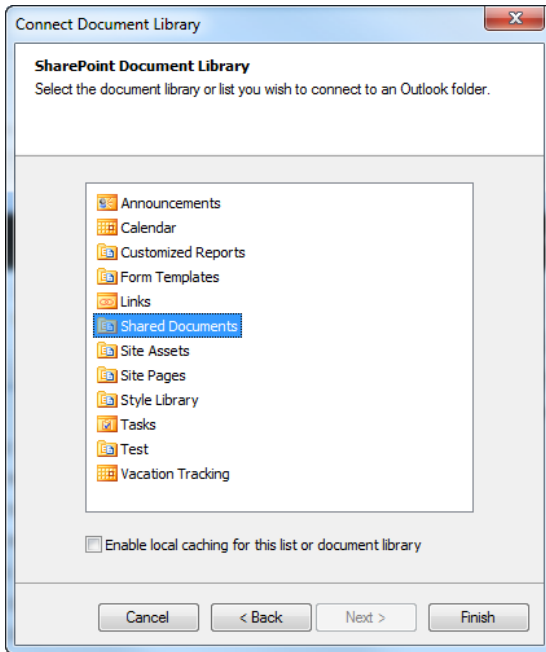
2. Click **Download new site.**

The **Download New Site** dialog displays:



3. Enter the URL of the site and use your default credentials, or user-specific credentials.
4. Click **Download**. The site displays in the Connect Document Library dialog.

5. Click **Next**. A list of all lists and libraries in the site displays:



6. Select the list or library you want to display in Outlook. If you want the list or library to be cached (available offline) check the **Enable local caching for this list or document library** box.
7. Click **Finish**. The list or library displays in the Colligo for SharePoint list in your Outlook folder tree.

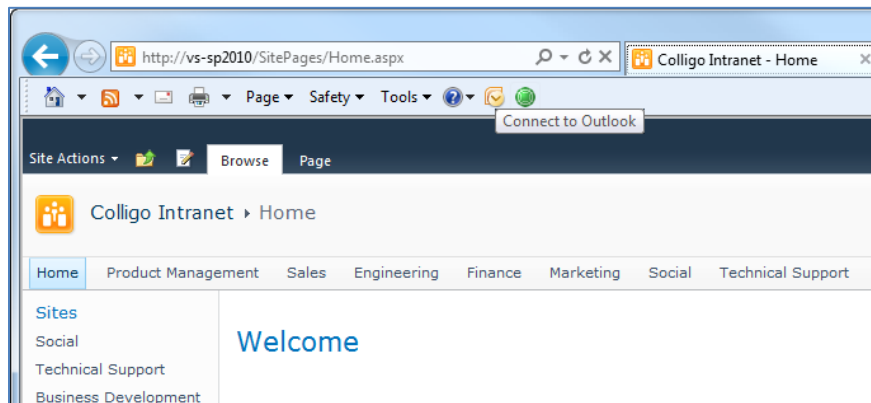
Using the Connect to Outlook Button in Internet Explorer

You can add a SharePoint list or library to Contributor Add-in for Outlook directly from Internet Explorer using the **Connect to Outlook** button.

To add a site with the Connect to Outlook button:

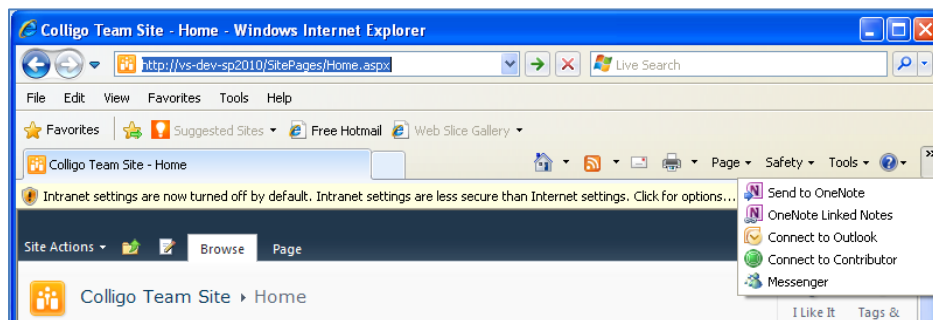
1. Navigate to the SharePoint list or library that you want to add as a folder in Outlook, and click the **Connect to Outlook** button:

Internet Explorer 9

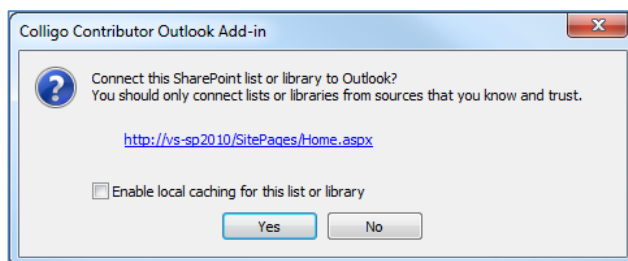


NOTE: If the **Connect to Colligo Outlook** button is not visible, you need to enable the Command bar.

Internet Explorer 8

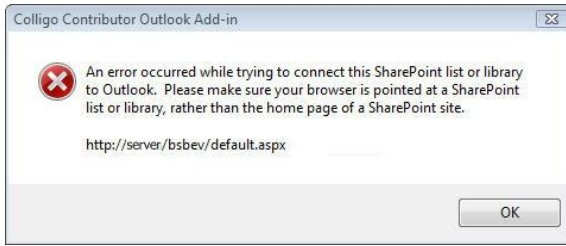


The following dialog displays:



2. Check the **Enable local caching for this list or document library** box if you want the list or library to be cached (available offline).
3. Click **Yes**. The list or library displays in the Colligo for SharePoint list in your Outlook folder tree.

NOTE: If you click the **Connect to Outlook** button when you're on a SharePoint page that is not a list or library, the following message displays:



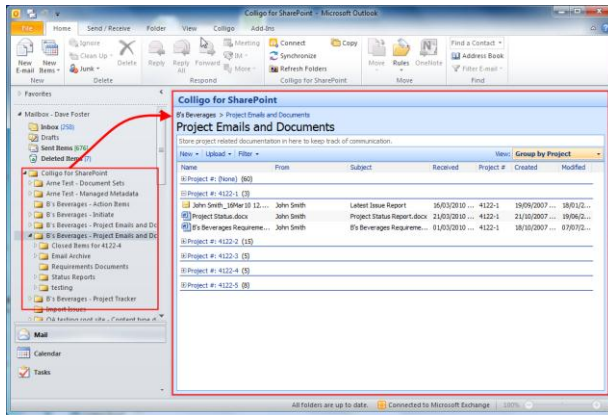
Click **OK**, then navigate to a list or library in Internet Explorer and click **Connect to Outlook** again.

Viewing Lists and Libraries in Outlook

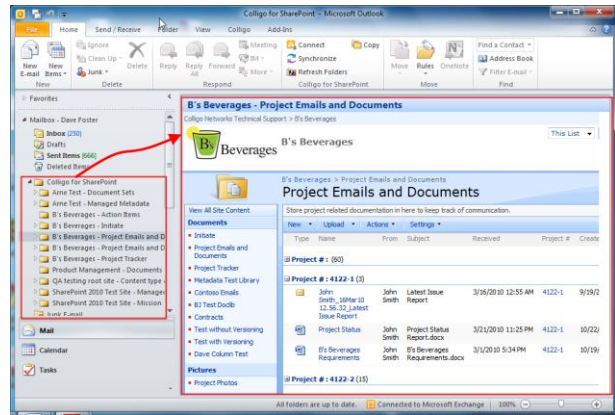
Click on an Outlook folder under the **Colligo for SharePoint** group to display the selected SharePoint location.

The folder location displays in one of two modes: **Cached** or **Online**.

Cached View



Online View



Online mode and cached mode have similar functionality, except that for the online view, the content is not cached (available offline). Both modes allow you to do the following:

- Upload content to SharePoint with metadata Prompt
- View the SharePoint site in Outlook
- Automatically extract Email metadata (To, From, Sent, Subject, etc.)
- Access and Edit existing SharePoint content including accessing metadata.

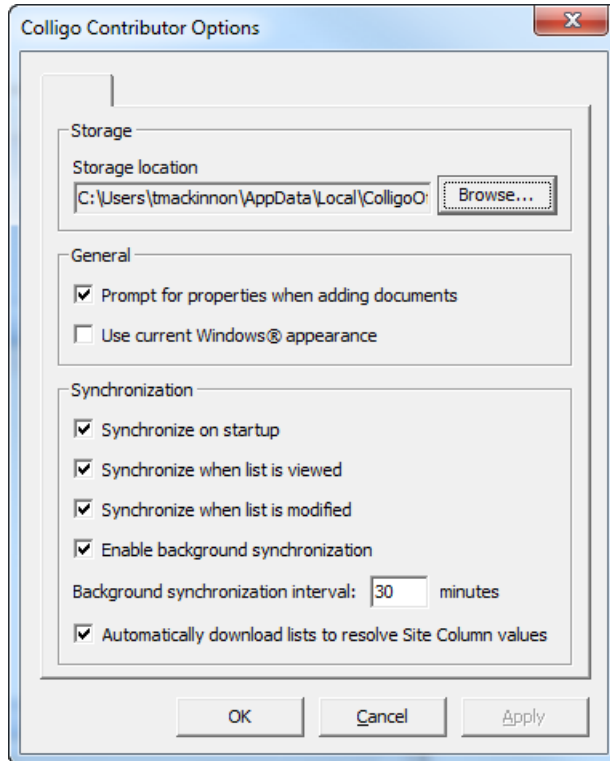
To refresh the content, click the **Refresh Folders** icon in the **Colligo For SharePoint** group in the **Home** tab in Outlook.

CONFIGURING YOUR SYNCHRONIZATION SETTINGS

The settings for how frequently your content is synchronized are set in the Control Panel.

1. From the **View** menu, select **Options**.

The **Colligo Contributor Options** dialog displays:



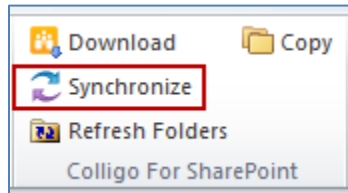
2. In the **General** section, you can turn on the prompt to record properties about the document by checking the **Prompt for properties when adding documents** box. You can override this setting for specific lists/libraries when you are configuring Default Metadata; see **Setting Default Metadata**.
3. In the **Synchronization** section, choose your preferred options:
 - a. **Synchronize on startup**: choose this option if you want your lists and libraries to synchronize every time Outlook starts
 - b. **Synchronize when list is viewed**: choose this option if you want your lists and libraries to synchronize every time a list or library is viewed
 - c. **Synchronize when list is modified**: choose this option if you want your lists and libraries to synchronize every time a list or library is modified
 - d. **Enable background synchronization**: choose this option if you want to set the synchronization to happen in the background on a time-specific basis, and enter your preferred time interval
 - e. **Automatically download lists to resolve Site Column values**: if you have lists that reference other lists (look-ups), checking this option ensures the related referenced lists are also downloaded

NOTE: Depending on how your IT Administrator has configured the installation, this dialog may not be accessible to you, or the synchronization options may be greyed out.

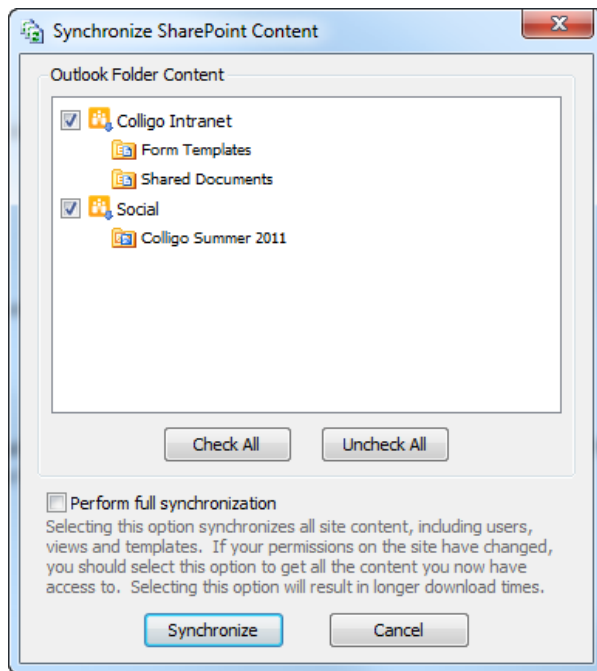
Synchronizing Content Manually

To manually synchronize your SharePoint content:

1. Click the **Synchronize** icon in the **Colligo For SharePoint** group in the **Home** ribbon in Outlook:



The **Synchronize SharePoint Content** dialog displays:



2. Check the boxes of the sites you want to synchronize, or use the **Check All** or **Uncheck All** buttons to set your preferences.
3. Click **Synchronize**.

Completing a Full Synchronization

Several of the synchronization dialogs have a **Perform Full Synchronization** option. A full synchronization downloads additional information. This includes definitions for Sites, Lists, Views, and Content Types, plus other site content that may not be retrieved during other standard sync processes.

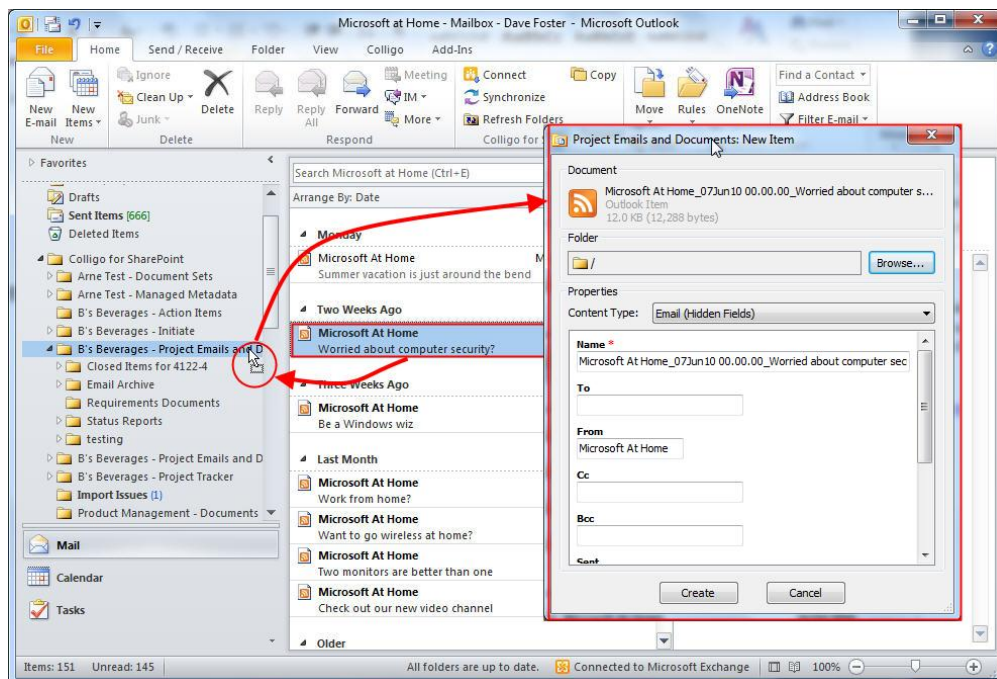
FILING ITEMS TO SHAREPOINT FOLDERS

You can file emails and documents to your SharePoint folders in Outlook in a number of different ways.

Dragging-and-Dropping Emails

You can upload one or multiple emails to SharePoint by dragging-and-dropping them from your inbox to a SharePoint location in your Outlook folder tree. You can also drag-and-drop other documents from your desktop or a Windows Explorer folder location.

Each time you file something to a SharePoint folder in Outlook, the metadata editor displays:



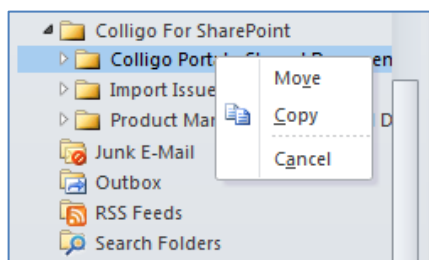
Edit the metadata fields as preferred and click **Create** to complete the upload process.

Move Versus Copy

When you drag-and-drop an item into a folder, it is either moved or copied to SharePoint. If it's moved, the email no longer exists in your Outlook. If it's copied, it exists both in SharePoint and in Outlook.

The default behavior when using the drag-and-drop action is Move. If you want to Copy the item to SharePoint, you can do one of the following:

- left-click and press Ctrl until you let go of the click
- right-click: when you let go of the click, the following dialog displays, giving you the option to **Copy**

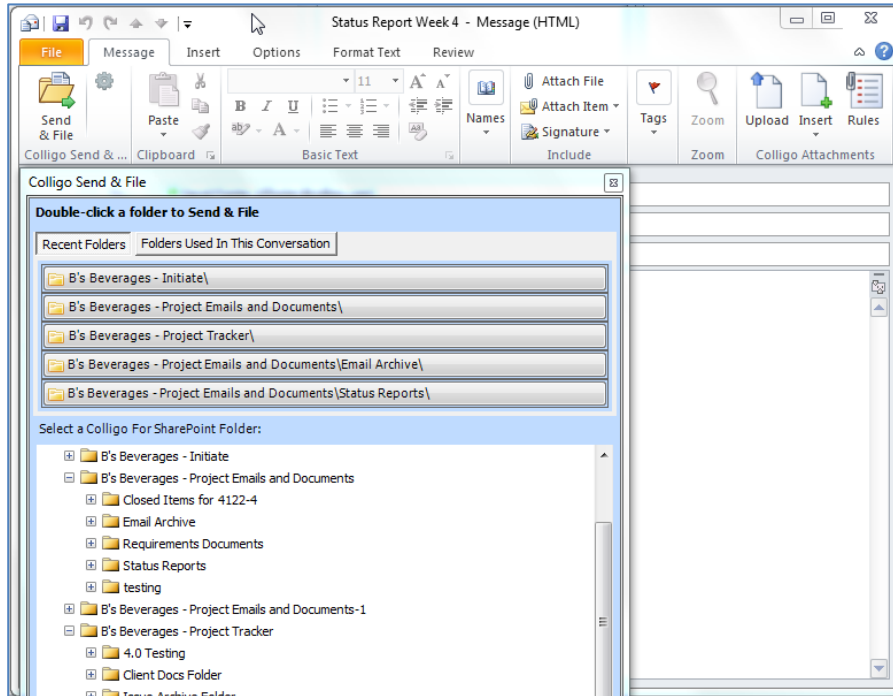


NOTE: attachments are copied to SharePoint and remain as part of the email.

Sending-and-Filing Emails

When you're creating a new email, you can use the **Send & File** button to send your email and file it at the same time.

1. Click the **Send & File** button, the **Colligo Send & File** dialog displays:

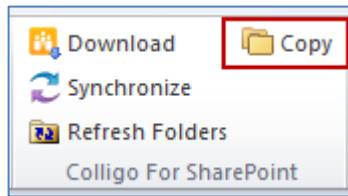


2. Browse to the location you want to file the email to and double-click to select the folder and send the email.

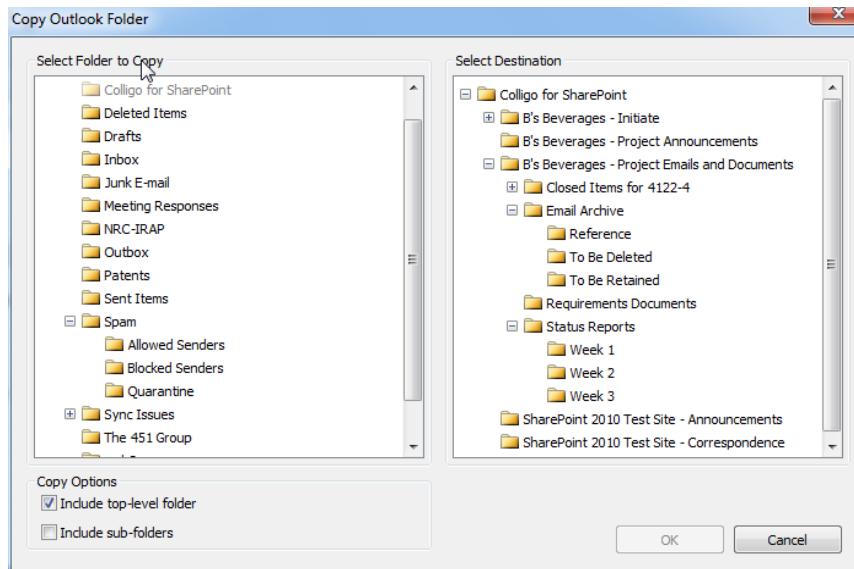
Using the Copy Folder

You can upload whole folders and their contents (including subfolders) from your mailbox to SharePoint.

1. Click the **Copy** icon in the **Colligo For SharePoint** group in the **Home** ribbon in Outlook:



The **Copy Outlook Folder** dialog displays:



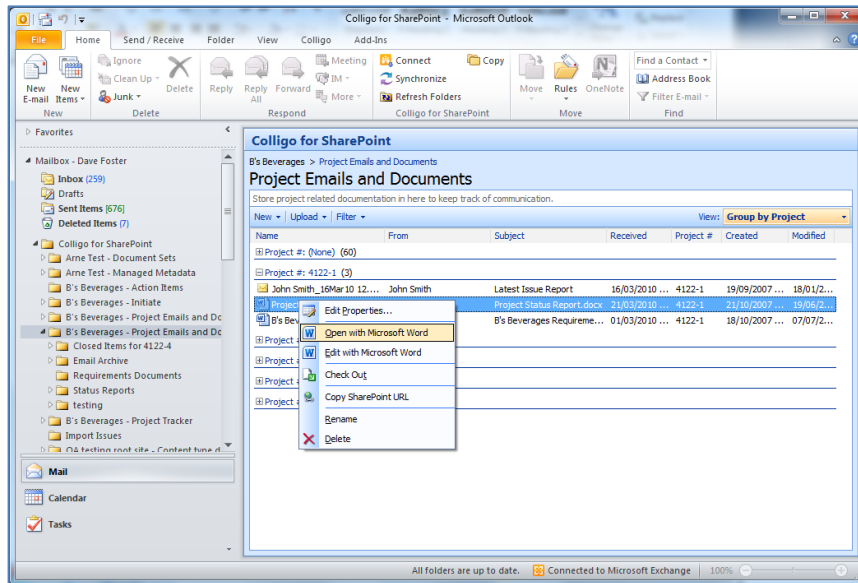
2. In the **Select Folder to Copy** panel, choose the folder that you want to copy to one of your SharePoint locations.
3. In the **Select Destination** panel, choose the SharePoint location to copy the folder to.
4. In the **Copy Options** section, choose if you want to include the top-level folder and/or any subfolders.
5. Click **OK**.

Working with Content in Cached Mode

Many SharePoint actions are available in the cached (offline) mode.

Right-click on an item to:

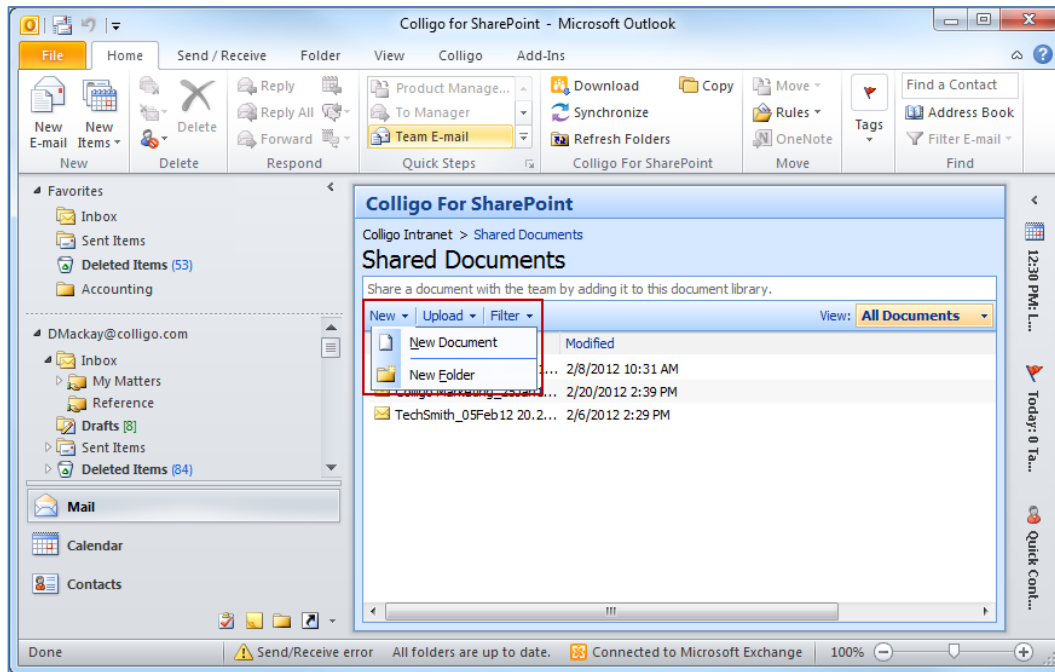
- Edit the properties
- Open/Edit
- Check Out, Check In, or Discard Check Out
- Rename content
- Delete content



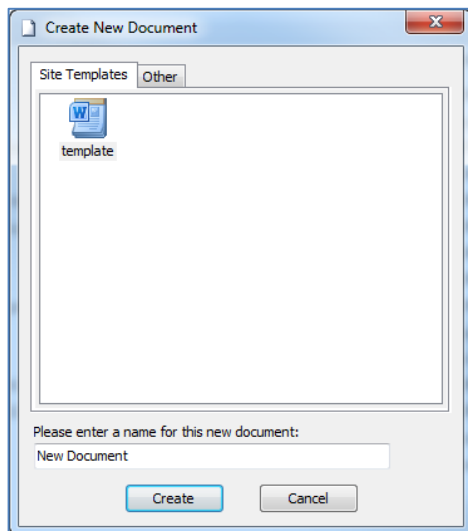
Creating New Content

To create new content in a cached folder:

1. Click the **New** drop-down menu:



2. Select the **New Document** option to display the **Create New Document** dialog:

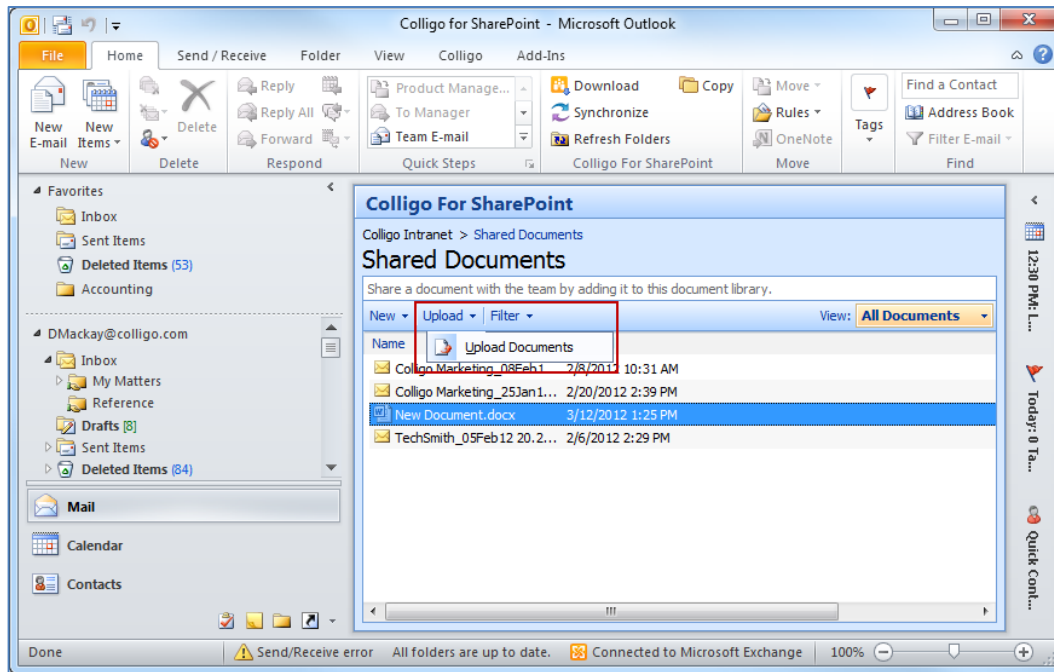


3. Choose your document type from the **Site Templates** tab or the **Other** tab.
4. Enter a name for the document, and click **Create**.
5. The **Edit Properties** dialog displays. Edit as preferred.
The new document is added to the list or library.

Uploading Existing Content

To upload existing content to a cached folder:

1. Click the **Upload** drop-down menu and select **Upload Documents**:



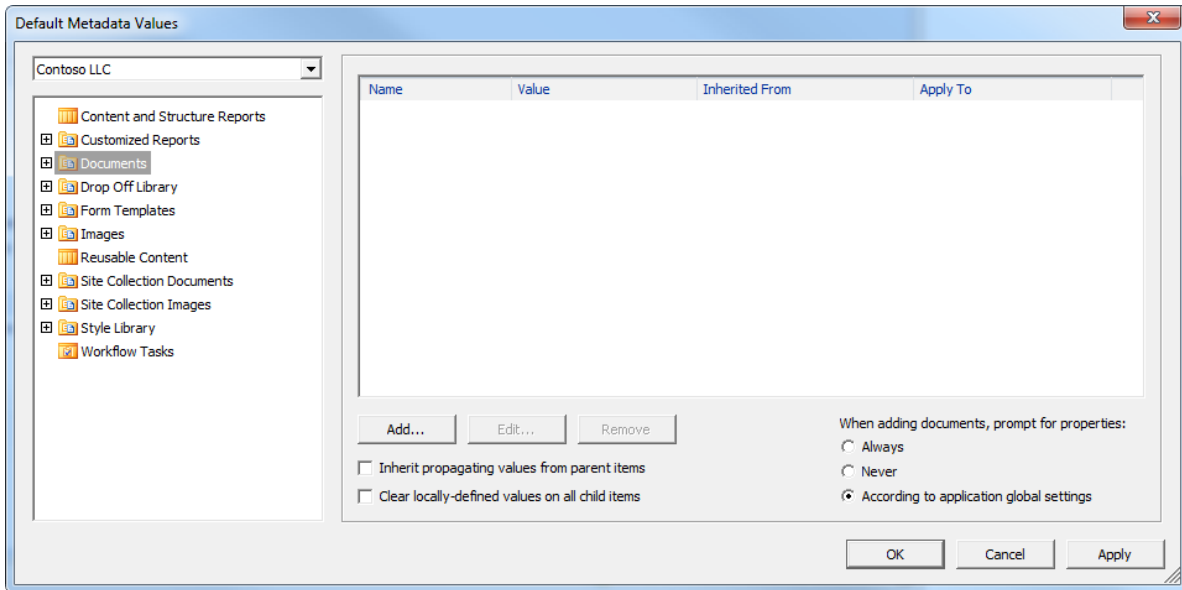
The **Upload Documents** dialog displays.

2. Browse to the location of the document you wish to upload and click **Open**.
3. The **Edit Properties** dialog displays. Edit as preferred and click **Create**.
The new document is added to the list or library.

Setting Default Metadata

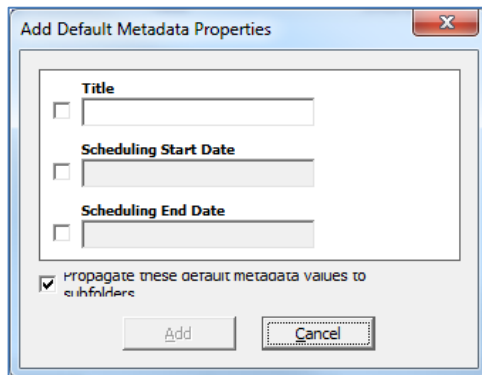
If you want to tag all documents and items that you add or upload to a list or library with the same metadata, you can set default metadata values through the Control Panel:

1. From the Control Panel **File** menu, choose **Default Metadata Values**.
The **Default Metadata Values** dialog displays:



2. Select the site and library/list that you want to configure.
3. To add a metadata tag, click **Add**.

The **Add Default Meta data Properties** dialog displays, displaying the metadata field options that are set in the document library in SharePoint.



4. Enter your preferred tags and click **Add**.
5. If you want the values to propagate to any subfolders, check the **Propagate these default metadata values to subfolders** box.
6. To configure the behavior or the prompt to record document properties, choose a radio button on the right under the **When adding documents, prompt for properties** section:
 - **Always**
 - **Never**
 - **According to application global settings** (as set in step 2 of **Configuring your Synchronization Settings**)

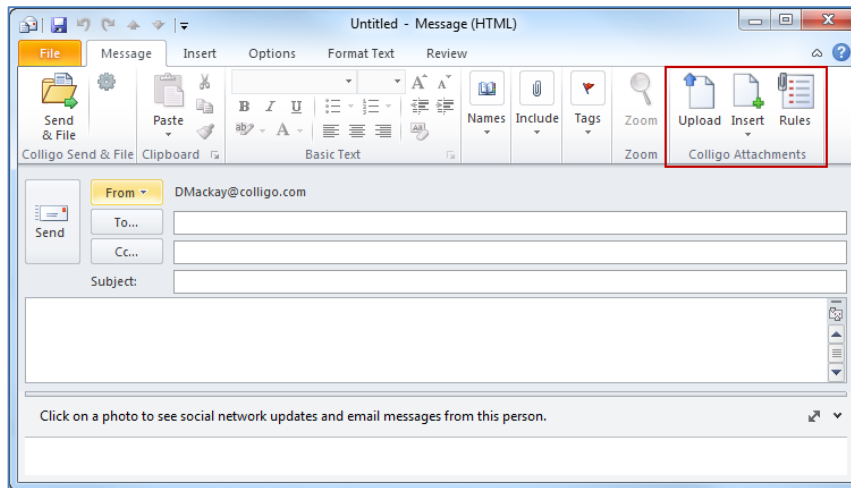
USING THE COLLIGO ATTACHMENT MANAGER

Colligo Contributor Add-in for Outlook has an Attachment Manager tool that gives you a number of ways to share and manage your SharePoint content.

Uploading an attachment to SharePoint

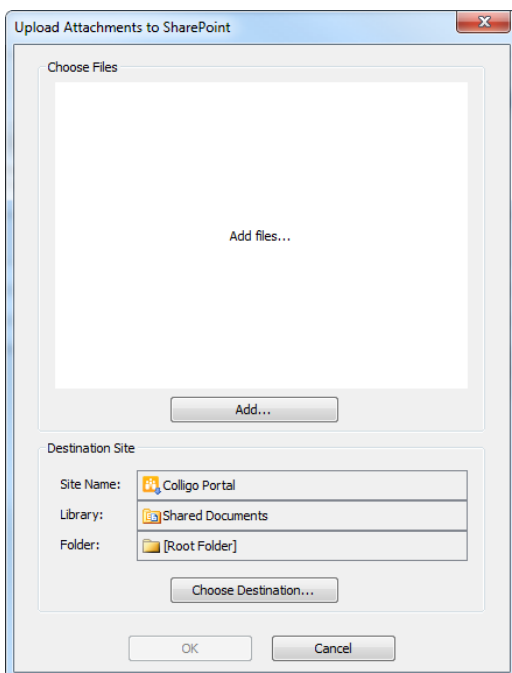
If you want to send someone a document, but you would rather send a link to a SharePoint location instead of an attachment, you can upload the document to SharePoint and insert a link to the location into your email. You can do this from Outlook using Colligo's Attachment Manager.

When you launch a new email, the **Colligo Attachments** group displays in the **Message** ribbon:



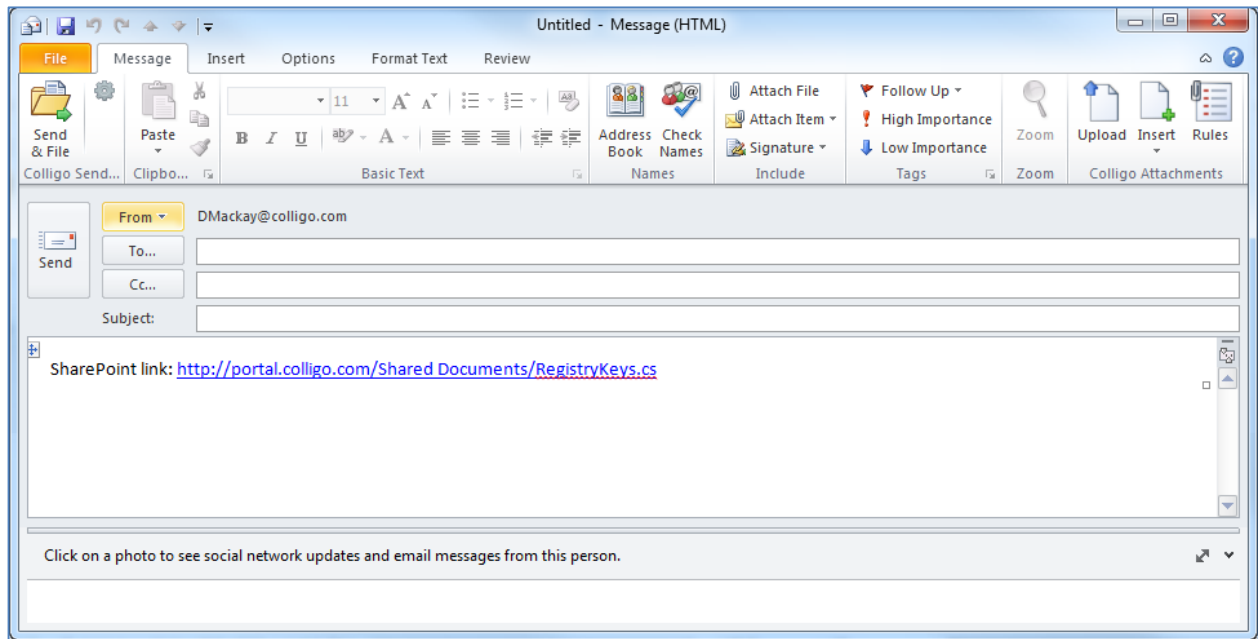
NOTE: The **Colligo Attachments** group only displays in the **Message** ribbon of a new email; it does not display anywhere else in Outlook.

1. Click **Upload** to display the **Upload Attachments to SharePoint** dialog:



2. In the **Choose Files** section, click **Add** and browse to the location of the document(s) you want to upload.
3. In the **Destination Site** section, click **Choose Destination** and select the **Site**, **Library**, and **Folder** you want to upload your documents to.
4. Click **OK**. The **New Item** dialog displays.
5. Enter any properties and click **Create**.

The document is uploaded to your specified location, and a link to the document's location is inserted into the body of your email:



Inserting a Link to a Document in SharePoint

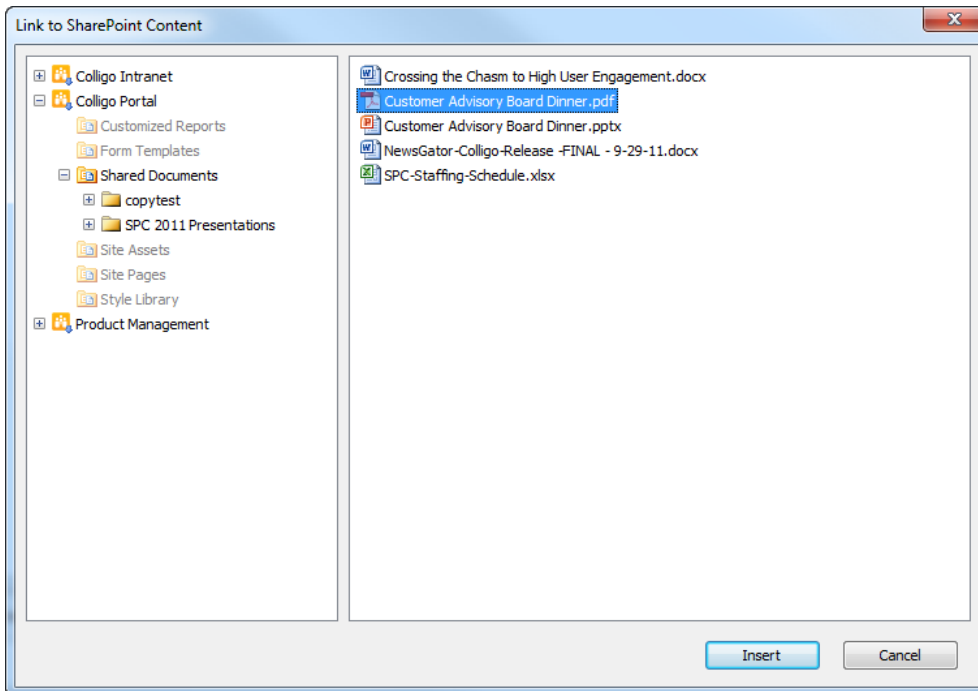
If the document you want to share is already in SharePoint, you can insert a link to the document in your email,

To insert a link to an item in SharePoint:

1. Click **Insert** in the Colligo Attachments group in the **Message** ribbon and choose either **Attachment Link** or **Text Link**.

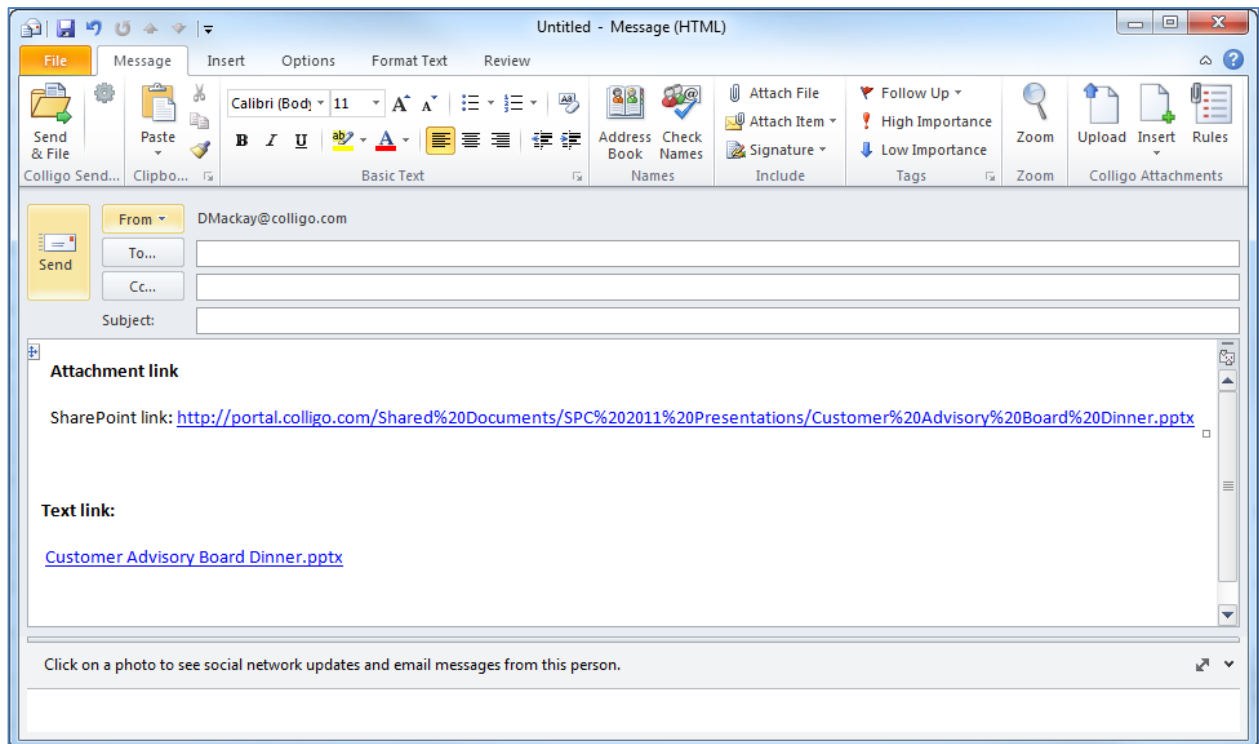
NOTE: The **Attachment** link displays the full path of the SharePoint location, while the **Text** link displays only the name of the file.

The **Link to SharePoint Content** dialog displays:



2. Browse through the SharePoint libraries to find the document you want to link to, and click **Insert**.

The links display as follows:

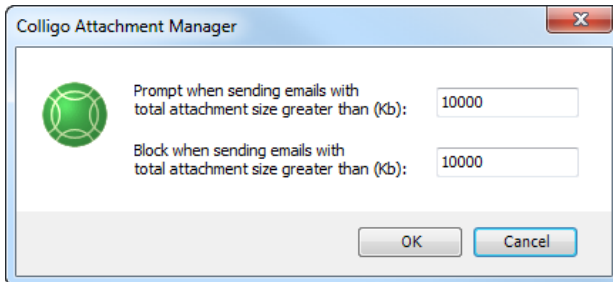


Setting Attachment Rules

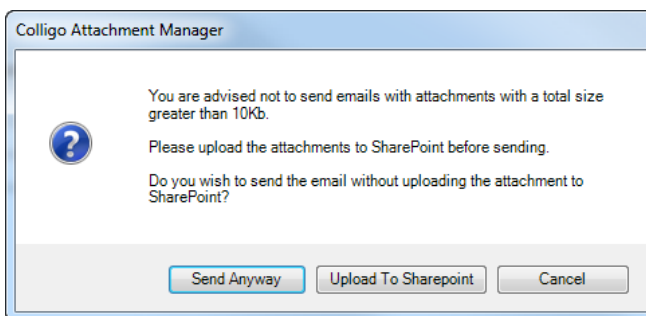
You can configure rules for the size of your attachments that correspond to your organization's email policies to display a prompt when you have an attachment exceeding a certain size, or to block sending an email when an attachment exceeds a specified size.

To configure the rules:

1. Click **Rules** in the **Colligo Attachments** group to display the **Colligo Attachment Manager** dialog:

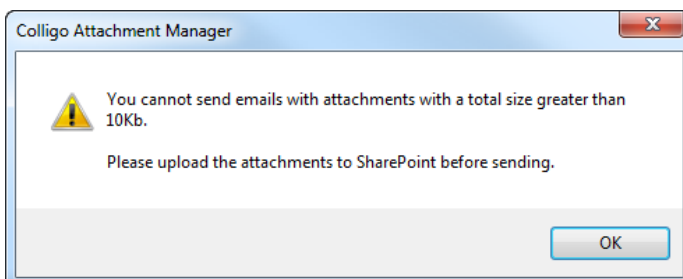


2. In the field **Prompt when sending emails with total attachment size great than (Kb)**, enter the limit for the size of the attachment. If you attempt to send an email that has an attachment greater than the number you have specified in this field, the following dialog displays:



Choose from one of the following options:

- a) **Send Anyway**: choose this option to ignore the warning and send the email as configured
 - b) **Upload to SharePoint**: choose this option to display the **Upload Attachments to SharePoint** dialog and choose the location in SharePoint you want to upload the attachment to
3. In the field **Block when sending emails with total attachment size great than (Kb)**, enter the limit for the size of the attachment. If you attempt to send an email that has an attachment greater than the number you have specified in this field, the following dialog displays:



4. Click **OK** and the **Upload Attachments to SharePoint** dialog displays.
5. Choose the upload destination and click **OK**. The item is uploaded and a link to the SharePoint location is inserted into your email.