

Colligo Email Manager 5.1

Administrator's Guide



DOCUMENT REVISION HISTORY

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5.1 Revision 1	Added prerequisite download links for client software requirements	November 30, 2011
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INTRODUCTION

This document provides guidance for your deployment of Colligo Email Manager.

User documentation is available on the Colligo Email Manager support website:
<http://support.colligo.com>.

For any further technical details, please contact Colligo Technical Support at support@colligo.com, or for sales related questions, please contact sales@colligo.com.

Target Audience

- IT Administrators
- Technical Evaluators
- Deployment Managers

Overview

Colligo Email Manager is an easy-to-deploy .NET client-only application; no server modifications are required. The installer package is 5 MB in size. When installed, it consumes less than 10 MB of disk space, not including content. Colligo Email Manager supports customized installations and can be deployed using your choice of deployment tools.

Colligo Email Manager supports SharePoint 2010 and SharePoint 2010 Online (Office365), and Outlook 2007 and 2010.

Colligo Email Manager provides the following functionality:

- Filing of email and attachments to SharePoint 2010 sites through drag-and-drop or ribbon buttons
- Full metadata support for tagging email and attachments as they are being filed
- Simultaneous federated search of SharePoint 2010 sites and Outlook
- Sending links to attachments from SharePoint 2010
- Browsing of SharePoint 2010 document libraries from within Outlook

SHAREPOINT SECURITY & PRIVILEGES

By using SharePoint's web services to access SharePoint data, Colligo Email Manager respects all privileges defined on the site. Colligo Email Manager supports most standard sign-on processes supported by SharePoint, including support for default credentials and other specified credentials. Passwords are stored in a secure manner using the Windows Cryptographic API.

The following standard Windows IIS authentication types are supported:

- Basic
- Digest
- Kerberos (Integrated Windows)
- NTLM (Integrated Windows)

Claims-based authentication is also supported. SharePoint by default does not provide web service permissions to anonymous users, so this permission level cannot be used for uploading documents to SharePoint. Client certificates, ASP.NET forms-based authentication, and single-sign-on (SSO) based on Active Directory Federation Services (ADFS) or similar identity management systems are not currently supported.

TECHNICAL REQUIREMENTS

Software Requirements

Colligo Email Manager requires the following software:

- Microsoft Office 2010 SP1
- Microsoft Outlook 2007 or 2010 (32-bit or 64-bit edition)
- Internet Explorer 7, 8, or 9
- Windows XP SP3, Windows Vista, or Windows 7
- SharePoint 2010 or SharePoint 2010 Online (Office365)

Client Software Requirements

Colligo Email Manager has the following client software requirements:

- Microsoft® .NET framework 4.0 Runtime
 - <http://www.microsoft.com/download/en/details.aspx?id=17718>
- Microsoft Visual C++ 2010 Redistributable Package
 - 32-bit Operating System: <http://www.microsoft.com/download/en/details.aspx?id=5555>
 - 64-bit Operating System: <http://www.microsoft.com/download/en/details.aspx?id=14632>
- Visual Studio Tools for Office (VSTO)
 - <http://www.microsoft.com/download/en/details.aspx?id=20479>
- Microsoft Office PIAs
 - Office 2010: <http://www.microsoft.com/download/en/details.aspx?id=3508>
 - Office 2007: <http://www.microsoft.com/download/en/details.aspx?id=18346>

Server Software Requirements

Colligo Email Manager requires at least one of the following:

- Microsoft® SharePoint® Server 2010
- Microsoft SharePoint Foundation 2010
- SharePoint 2010 Online (Office 365®)
- (Optional) Microsoft FAST Search Server 2010 for SharePoint

Colligo Email Manager has been tested with and fully supports Service Pack 1 (SP1) for SharePoint Server 2010 and SharePoint Foundation 2010. Contact Colligo Support (support@colligo.com) for compatibility questions regarding further Cumulative Updates and Service Packs for SharePoint.

Hardware Requirements

Colligo Email Manager requires a Windows-based PC (500 MHz minimum processor, 20MB of free disk space, 256MB RAM, 1024 x 768 or higher resolution monitor).

INSTALLING COLLIGO EMAIL MANAGER

There are two installers for Colligo Email Manager. These are a .exe installer and a .msi installer.

Additionally, the installer package you need is dependent on which Operating System you are running:

- For a 32-bit operating system, use the x86 installer
- For a 64-bit operating system, use the x64 installer

EXE Installer

This installer package is an executable file with the following key features:

- Supports interactive install only (does not support silent install)
- Automatically installs software prerequisites (downloaded from www.colligo.com)
- Not customizable

Interactive EXE Install

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

1. Double-click the installation file.
2. Prerequisites are downloaded and installed.
3. Enter your license key.
Colligo Email Manager can be set to launch at Windows Start Up. This enables the background synchronization to start automatically.

MSI Installer

The MSI installer package has the following key features:

- Supports silent and interactive installs
- Does not install prerequisites - these must be downloaded and pre-installed
- Customizable

Interactive MSI Install

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

1. Ensure prerequisites are installed.
2. Double-click the installation file.
3. Enter your license key.

Silent Install or Uninstall

You can use the `msiexec` utility to install or uninstall silently.

To perform a silent install, use the following command line:

```
msiexec /i <Installer.msi> /qn
```

For example:

```
msiexec /i ColligoEmail Manager.msi /qn
```

To perform a silent uninstall, use the following command line:

```
msiexec /x <Installer.msi> /qn
```

You can install a customized version of Colligo Email Manager using the msi installer. When using a batch file to install a customized msi package, it is important to ensure the prerequisites are installed before attempting to install Colligo Email Manager.

An example batch file is listed below:

```
msiexec /i \\server\Email ManagerInstall\PreReq\O2007PIA.MSI /qn  
\\server\Email ManagerInstall\PreReq\vstor.exe /q  
msiexec /i \\server\Email ManagerInstall\CustomColligoEmail Manager.msi  
/qn
```

Disabling Colligo Contributor Add-In for Outlook

If you have Colligo Contributor Add-in for Outlook installed, it is recommended that you remove it before running Colligo Email Manager. Please disable the Colligo Contributor Add-in for Outlook by following the instructions here:

<http://www.colligo.com/support/kb/uninstall-add-in-for-outlook>

POST-INSTALL CONFIGURATION/COLLIGO EMAIL MANAGER SETTINGS

Colligo Email Manager saves settings in the registry. Many settings can be configured post-install by pushing out settings to the registry. The following tables describe the usage and format of the registry keys.

Miscellaneous Settings

Usage	MSI Property Name	Registry Key	Default Value	Format
Number of items in Favorites list	FAVORITES_DEPTH	EmailManager\FavoritesDepth	10	Number
Number of items in History list	HISTORY_DEPTH	EmailManager\HistoryDepth	10	Number
Enable metadata prompt	ENABLE_METADATA_PROMPT	EmailManager\EnableMetadataPrompt	TRUE	Text
Enable Contributor detection prompt	ENABLE_CONTRIBUTOR_DETECTION_PROMPT	EmailManager\EnableContributorDetectionPrompt	TRUE	Text
License Key	LICENSE_KEY	EmailManager\LicenseKey5.0	(not set)	Text
Alternate PST storage root location	STORAGE_ROOT	EmailManager\StorageRoot		Text
Name of PST file as shown in Outlook	ROOT_FOLDER_NAME	EmailManager\RootFolderName	(not set)	
Display setup wizard on launch	SHOW_SETUP_WIZARD	EmailManager\ShowSetupWizard	TRUE	Text
File name of email message uploaded to SharePoint; timestamp of upload plus filename	MSG_FILENAME_FORMAT	EmailManager\MsgFileNameFormat	{0}_{1:ddMMMYY HH.mm.ss}_{2}	Text
Format of timestamp in message filename	MSG_FILENAME_CULTURE	EmailManager\MsgFilenameCulture	.NET invariant culture (generic english)	Text

NOTE: For more information on SharePoint file naming rules, please see:

<http://support.microsoft.com/kb/905231>.

Colligo Email Manager conforms to all of the conventions and validates user input in the metadata dialog according to this site.

Logging

Usage	MSI Property Name	Registry Key	Default Value	Format
Log level -1 = Off 0 = Normal 1 = Verbose	LOG_LEVEL	EmailManager\LogLevel	"0" - Normal	
Indicates if user can change the logging level.	LOG_LEVEL_CHANGE_ALLOWED	EmailManager\LogLevelChangeAllowed	"1" - Log level change is allowed	

URL Locations

Usage	MSI Property Name	Registry Key	Default Value	Format
Administrative Site Url	ADMIN_SITE_URL	EmailManager\AdminSiteUrl	""	Text
Custom URL to show when PST root folder is selected	ROOT_FOLDER_URL	EmailManager\RootFolderUrl		Text
Custom URL to show when Favorites folder is selected in PST	FAVORITES_URL	EmailManager\FavoritesUrl		Text
Custom URL to show when Folders folder is selected in PST	NAVIGATION_FOLDERS_URL	EmailManager\NavigationFoldersUrl		Text

Search

Usage	MSI Property Name	Registry Key	Default Value	Format
Outlook Search Result Limit	SEARCH_OUTLOOK_LIMIT	Search\OutlookLimit	200	Number
SharePoint Search Result Limit	SEARCH_SHAREPOINT_LIMIT	Search\SharepointLimit	200	Number
Search File Extensions	SEARCH_FILE_EXTENSIONS	Search\FileExtensions	""	Text
Search Outlook	SEARCH_ENABLE_OUTLOOK_SEARCH	Search\EnableOutlookSearch	FALSE	Text
SharePoint Fast Search	SEARCH_ENABLE_FAST_SEARCH	Search\EnableFastSearch	FALSE	Text
Outlook Search Pane Visible	SEARCH_OUTLOOK_PANE_VISIBLE	EmailManager\Search\OutlookPaneVisible	TRUE	Text
Outlook Pane Dock Position	SEARCH_OUTLOOK_PANE_DOCK_POSITION	EmailManager\Search\OutlookPaneDockPosition	Right	Text
Outlook Pane Width	SEARCH_OUTLOOK_PANE_WIDTH	EmailManager\Search\OutlookPaneWidth	1854	Number
Outlook Pane Height	SEARCH_OUTLOOK_PANE_HEIGHT	EmailManager\Search\OutlookPaneHeight	50	Number

Silent Activation

Usage	MSI Property Name	Registry Key	Default Value	Format
Silent activation email address	SILENT_ACTIVATION_EMAIL	EmailManager\Activation\Email	(not set)	
Silent activation	SILENT_ACTIVATION	EmailManager\Activation\EnableActivation	"0" = disabled	0 or 1
Silent activation organization	SILENT_ACTIVATION_ORGANIZATION_NAME	EmailManager\Activation\OrganizationName	(not set)	
Silent activation user name	SILENT_ACTIVATION_USER_NAME	EmailManager\Activation\UserName	(not set)	

Move and Copy Behavior

Usage	MSI Property Name	Registry Key	Default Value	Format
DefaultMoveOnDragAndDrop	DEFAULT_MOVE_ON_DRAG_AND_DROP	EmailManager\ DefaultMoveOnDragAndDrop	FALSE ("Copy" is the default)	<p>If FALSE, emails are copied when they are dragged and dropped to a PST folder. The emails always stay in the source folder, regardless of success, cancellation, or failure.</p> <p>If TRUE, emails are moved to SharePoint when dragged-and-dropped to a PST folder. However, the user can press Ctrl to copy the emails (this is the reason for the word Default in this setting). If the user clicks Cancel or an email fails during the upload, the emails are moved to the Recovered Items folder.</p> <p>If TRUE, dragging-and-dropping with a right-click shows a standard Outlook pop-up menu with Move, Copy, and Cancel options. If the setting is FALSE, dragging-and-dropping with a right-click has the same results as a left-click drag-and-drop.</p>
ForceMoveOnDragAndDrop	FORCE_MOVE_ON_DRAG_AND_DROP	EmailManager\ ForceMoveOnDragAndDrop	FALSE	<p>If FALSE, the DefaultMoveOnDragAndDrop setting controls the drag-and-drop behavior.</p> <p>If TRUE, emails are moved when they are dragged-and-dropped to a PST folder. Successfully uploaded emails are removed from the source folder. Emails that failed or were cancelled during the upload remain in the source folder. Dragging-and-dropping with a right-click has the same results as a left-click drag-and-drop (no prompt).</p>
MoveOnSendPlusFile	MOVE_ON_SEND_PLUS_FILE	EmailManager\ MoveOnSendPlusFile	FALSE ("Copy" is the default)	<p>If FALSE, emails remain in the Sent Items folder after an email has been filed.</p> <p>If TRUE, emails are removed from the Sent Items folder after an email has been filed.</p>
ForceMoveOnSendPlusFile	FORCE_MOVE_ON_SEND_PLUS_FILE	EmailManager\ ForceMoveOnSendPlusFile	FALSE	<p>If FALSE, the MoveOnSendPlusFile setting controls the Send-plus-File behavior.</p> <p>If TRUE, emails are removed from the Sent Items folder after an email has been filed.</p>

EDITING THE MSI

To edit the MSI installer package you need an MSI database editor. Colligo recommends the Orca database editor. Orca is a Microsoft utility for modifying and validating Windows Installer packages. It is intended to allow setup authors and administrators to manipulate databases compatible with the Windows Installer Service. This utility is a part of the Windows Installer SDK download, along with other MSI related tools.

An introduction to Orca can be found on the Microsoft site:

<http://support.microsoft.com/kb/255905/EN-US/>

Installing the Orca MSI editor

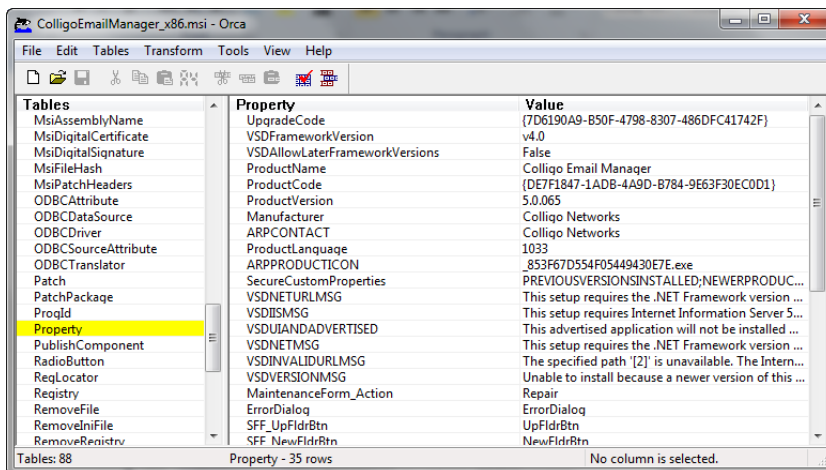
Instead of downloading the entire Windows Installer SDK, you can download Orca from Colligo's web site: <http://support.colligo.com/Lists/Knowledge%20Base/DispForm.aspx?ID=4>

Using Orca to Edit the MSI

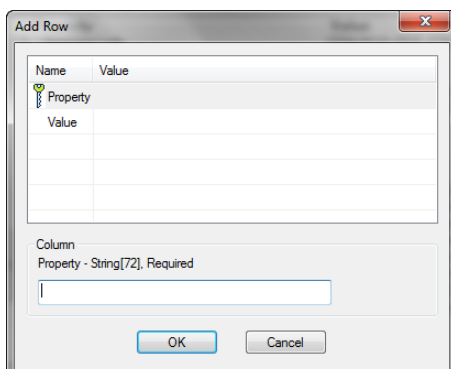
Once you have installed Orca, you can start editing the Colligo Email Manager.msi file. Colligo recommends copying the MSI file and working on the copy (since **Save As** in Orca does not save the entire MSI package).

Editing an MSI file:

1. Open the MSI file in Orca.
2. Navigate to the **Property** table in the **Tables** list.



3. From the **Tables** menu, select **Add Row**.
The **Add Row** dialog displays:



4. Enter the **Property** name and **Value**.
5. Click **OK**.

The new property displays in the Property Table.

NOTE: Ensure you are using the exact same property names as specified in the **Post-Install Configuration/Colligo Email Manager** Settings section. The property names are case sensitive.

NOTE: When editing an MSI database using Orca, there are extra steps required if you perform a **Save As....** As a best practice, it is advisable to edit an MSI database and **Save** the file being edited.

COLLIGO ADMINISTRATOR

Colligo Administrator is a system for managing, configuring, and monitoring Colligo Email Manager from a SharePoint server. Colligo Administrator consists of two components: the administrative server, which is built on standard SharePoint (SharePoint 2010 or later) and the administrative client, which is built into Colligo Email Manager.

Colligo Administrator allows you to centrally administer your users' SharePoint sites, folders and favorites, making it easy for users to file emails and documents to the right locations and access the right content without having to understand SharePoint.

For more information about Colligo Administrator, contact [Colligo Sales](#).

ACTIVATION AND LICENSING

Colligo Email Manager is normally licensed on a per user / per machine basis and the activation system is used to enable and authorize client installation. Each Colligo Email Manager client performs an activation request to the Colligo Activation servers to gain the necessary authorization for execution. The results of this activation are recorded in a special file that is stored in the installation area of Colligo Email Manager.

In a remote desktop server environment, where the user profile and storage may be located on network storage or may be created on demand, this activation file may not be maintained between sessions leading to unnecessary and repeated activation requests.

There is special licensing and license keys available for use with a remote desktop server environment that eliminates this activation request traffic. For further information contact [Colligo Sales](#).

VIRTUALIZATION AND HOT DESKING

Colligo Email Manager supports Citrix XenDesktop and Windows Remote Desktop (RDP) for multi-user, multi-session scenarios.

In a multi-user, multi-session environment, Colligo recommends that you use the STORAGE_ROOT MSI property or registry key to define an alternative storage location for Outlook's PST folder so there is no conflict when a user logs in to multiple locations. Using this property allows the Administrator to define where the PST should be stored and should prevent any issues with users accessing the same PST file from Outlook.

In addition to the STORAGE_ROOT property, you can use two merge fields (EnvironmentComputerName and EnvironmentUserName) in this property to point to a location that is specific to the machine's physical location, rather than a single network location.

For example, a computer named ColligoComputer with a user named ColligoUser with the STORAGE_ROOT: `z:\PSTs\EnvironmentComputerName\EnvironmentUserName`, the resulting path would be `z:\PSTs\ColligoComputer\ColligoUser`

For more information about Citrix and remote desktop services, please contact Colligo.

COMMUNICATIONS

Colligo Email Manager communicates with SharePoint through the web services, the details of which are available on MSDN at: <http://msdn2.microsoft.com/en-us/library/aa979690.aspx>.

These web services calls are transmitted over HTTP (or HTTPS) using TCP. Colligo Email Manager also uses FrontPage RPC methods to communicate with the SharePoint server. FrontPage RPCs are also transmitted over HTTP(S) and TCP.

Details of the FrontPage RPC protocols are available on MSDN at: <http://msdn2.microsoft.com/en-us/library/ms954084.aspx>.

The services described above are installed and enabled on SharePoint by default. Because they are layered on top of TCP/HTTP, communication works over most WAN/VPN and/or wireless connections, as well as a standard LAN.

WHITE LABELING

For information on white labeling, please contact Colligo. There are a number of msi properties that you can configure to reflect your own company name or branding in the interface. This feature requires an additional license from Colligo.

METADATA

Colligo Email Manager prompts users to enter metadata when they upload content. The process helps maintain SharePoint metadata and drives user adoption by simplifying the process of entering metadata. You can enable or disable this functionality. (See **Post-Install Configuration/Colligo Email Manager Settings**)

Colligo Email Manager automatically extracts 22 metadata properties from email messages that are filed to SharePoint, and adds those properties to appropriate columns in SharePoint. This allows filed email to be easily found at a later time.

CREATING SHAREPOINT LIBRARIES FOR EMAIL

Colligo provides a sample list template file that can be used to create a sample testing document library. Download the template from the Colligo Email Manager support site, install it to the List template gallery, and use it to create a new document library in your site.

Downloading the List Template

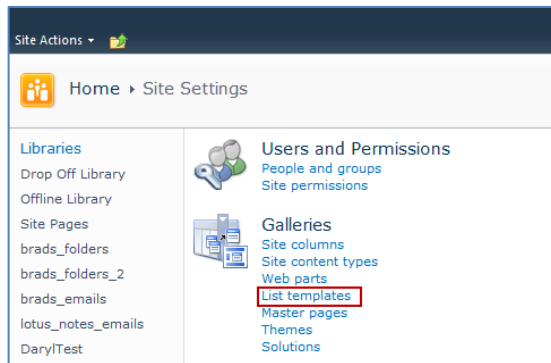
You can download the list template from the following location:
<http://support.colligo.com/Lists/Features/DispForm.aspx?ID=65>

Download the attachment *CfsEmailLibrary2010.zip*.

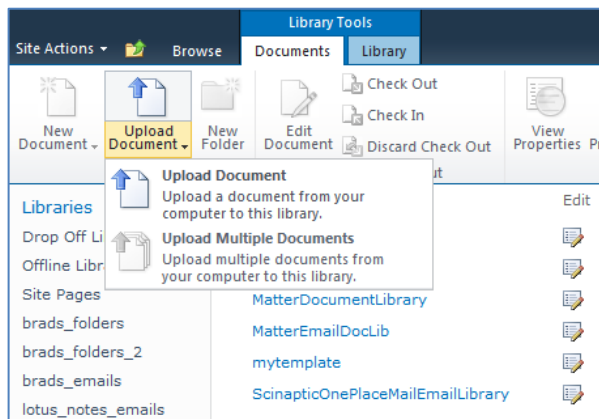
The zip file contains a site template named *CfsEmailLibrary2010.stp*.

Installing the Sample List Template

1. Extract the list templates to the preferred location.
2. Navigate to the site collection you want to add the list template to.
3. In your SharePoint site, navigate to **Site Actions** -> **Site Settings**.
4. On the **Site Settings** screen, in the **Galleries** section, select **List Templates**:

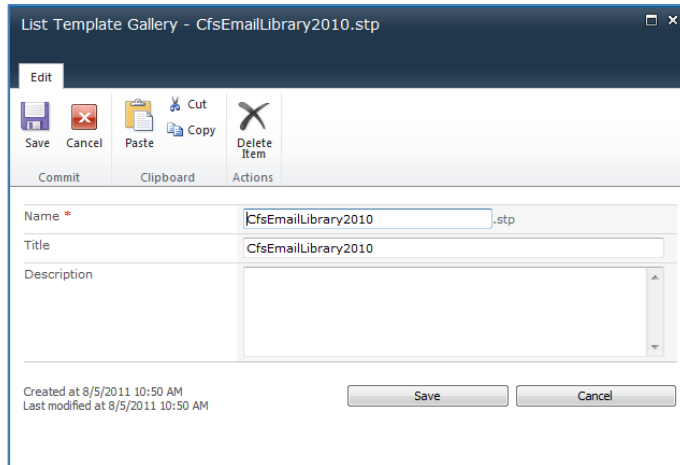


5. In the List Template Gallery, in the **Library Tools** > **Documents** ribbon, click **Upload Document**:



The **Upload Document** dialog displays.

6. Browse to the list template file (**CfsEmailLibrary2010.stp**) and click **OK**.
 The **List Template Gallery** dialog displays:

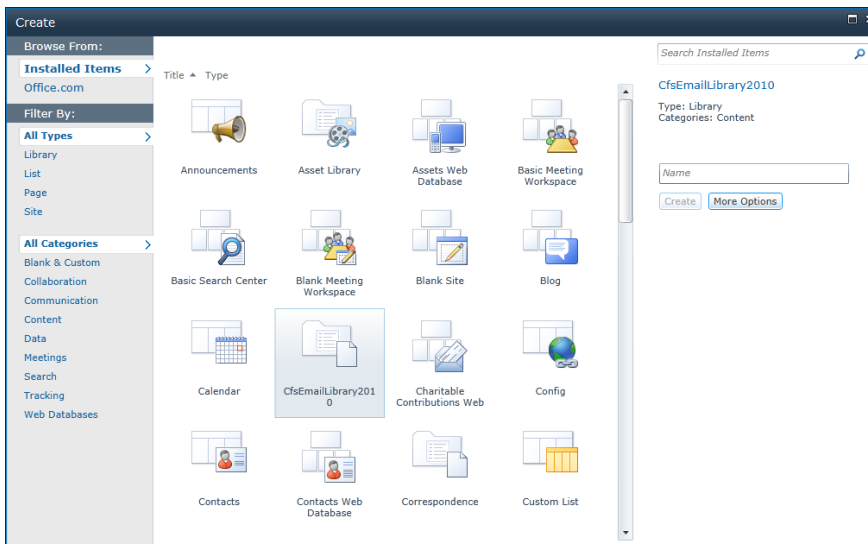


7. Enter the following information:
 - a. **Name:** enter a name for the template gallery
 - b. **Title:** enter a title that reflects the use of the template gallery
 - c. **Description:** enter a description for the template gallery
8. Click **Save**.
The new list template displays in the **List Template Gallery**.

Creating a Site

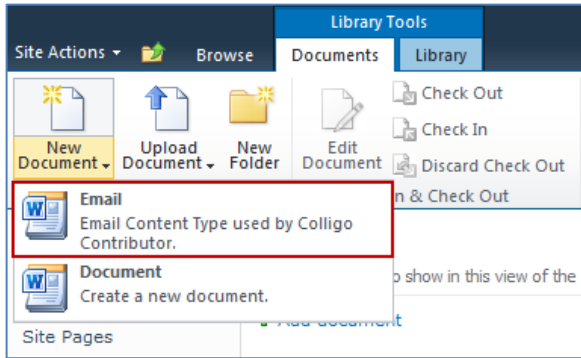
After you have installed the list template, you can create a new library based on the template.

1. Navigate to the site collection you want to add the list template to.
2. Select **Site Actions > More Options**.
The **Create** dialog displays.



3. Select the name of the list template you added.
NOTE: the name of the list template displays with the title you entered in step 7.b of Installing the Sample List Template:
4. In the right pane, enter a name for the library, and click **Create**.

5. Under the **Library Tools > Documents** ribbon, click the **New Document** drop-down arrow. The new Document Library displays as an option:



Manually Creating Content Types

Colligo Email Manager fully supports Content Types, and when working with Email documents Colligo recommends you create a content type for your email documents.

Enabling Metadata Extraction

To enable metadata extraction to a document library, you need to create a document library with columns that are defined to have metadata extracted into them. Columns can be created either directly, or by adding an existing content type to the library.

Colligo Email Manager extracts the following metadata properties from emails:

Email Metadata	Default Column Name	Type
Attachment	Attachment	Yes/No
Bcc	Bcc	Text
Bcc-Address	Bcc-Address	Text
Bcc-Type	Bcc-Type	Text
Categories	Categories	Text
Cc	Cc	Text
Cc-Address	Cc-Address	Text
Cc-Type	Cc-Type	Text
Conversation	Conversation	Text
From	From	Text
From-Address	From-Address	Text
From-Type	From-Type	Text
Importance	Importance	Number
Received	Received	Date/Time
Received-UTC	Received-UTC	Date/Time
Sensitivity	Sensitivity	Number
Sent	Sent	Date/Time
Sent-UTC	Sent-UTC	Date/Time
Subject	Subject	Text
To	To	Text
To-Address	To-Address	Text
To-Type	To-Type	Text

NOTE: Text fields can be Single Line of Text, or, Multiple Line of Text.

The **Default Column Name** refers to the display name of the SharePoint column

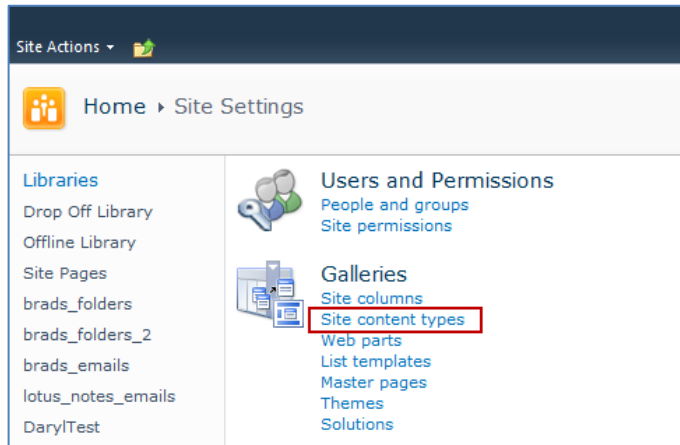
Addresses can be in exchange or SMTP format.

Metadata can be extracted into alternatively named columns. To extract metadata into non-default column names, see **Changing Column Mappings**.

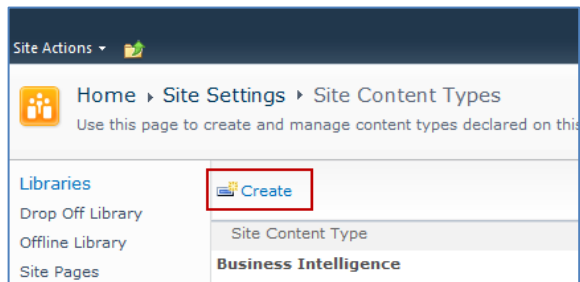
Adding a New Content Type to a Library

When creating an email content type, suitable SharePoint permissions are required. Typically, the email content type is created in the top level site within a site collection, allowing inheritance and customization in sub-sites.

1. In your document library, select **Site Actions** > **Site Settings**.
2. In the **Galleries** section, select **Site content types**:



3. In the **Site Content Types** page, click **Create**:



The **New Site Content Type** screen displays:

Site Actions Tessa MacKinnon

Home > Site Settings > Site Content Types > New Site Content Type

Use this page to create a new site content type. Settings on this content type are initially copied from the parent content type, and future updates to the parent may overwrite settings on this type.

I Like It Tags & Notes

Libraries

- Drop Off Library
- Offline Library
- Site Pages
- Email Document Library_new
- New Library

Lists

- Calendar
- Case

Name and Description

Type a name and description for this content type. The description will be shown on the new button.

Name:

Description:

Parent Content Type:

Select parent content type from:

Parent Content Type:

Description: Create a new document.

Group

Specify a site content type group. Categorizing content types into groups will make it easier for users to find them.

Put this site content type into:

Existing group:

New group:

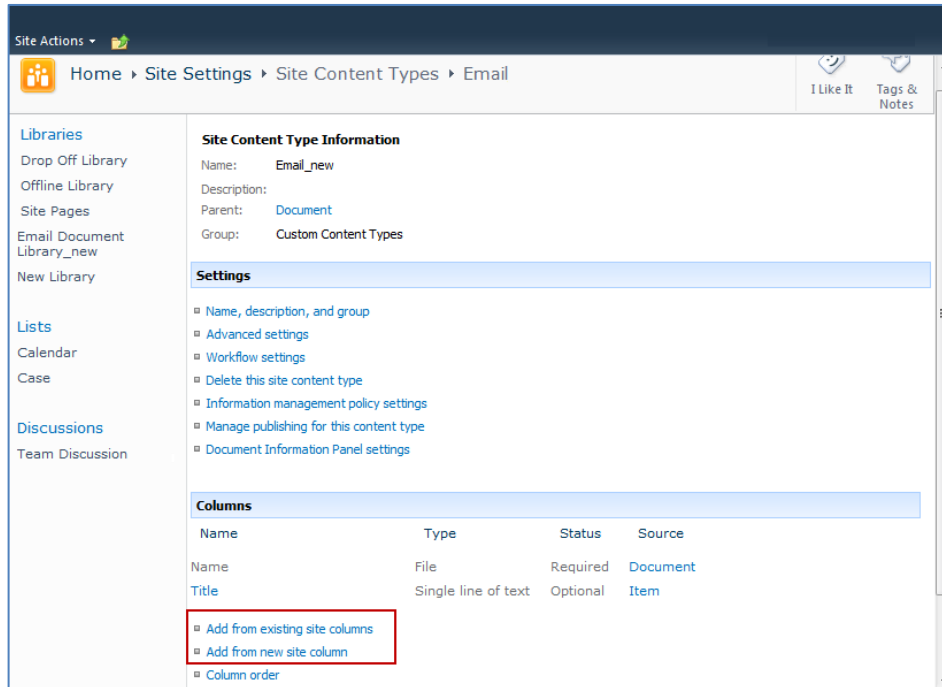
OK Cancel

4. Enter the following information:
 - a. **Name and Description**
 - i. **Name:** enter a name for the content type
 - ii. **Description:** enter a description for the content type
 - iii. **Parent Content Type:** from the first drop-down list, select the parent content type group; in the second drop-down list, select the parent content type.
 - b. **Group:** choose if the content type is put into either:
 - i. **Existing group:** choose an existing content group from the drop-down menu
 - ii. **New group:** enter a name for a new content group
5. Click **OK**.
The content type is added.

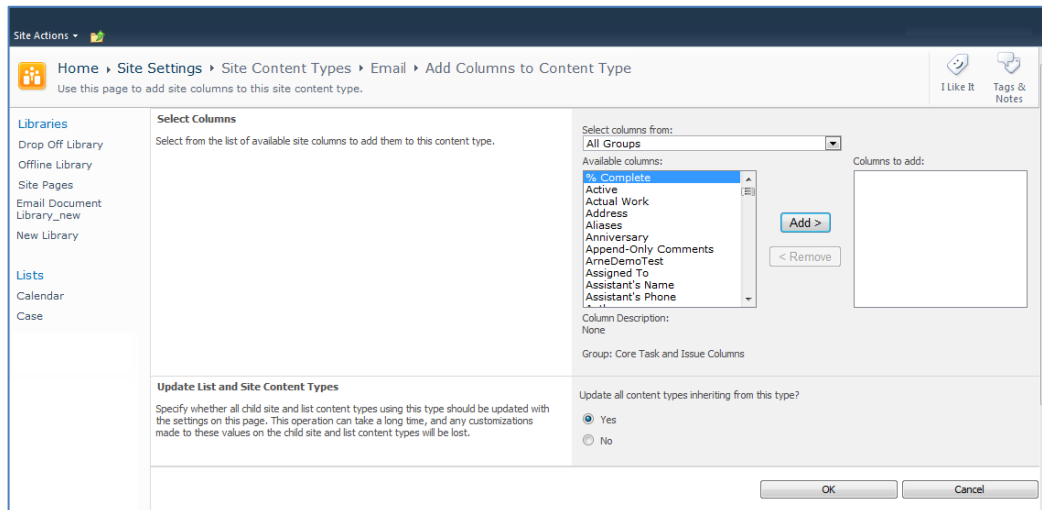
Configuring a Content Types

After adding a content type, you can add existing site columns as well as create new site columns.

1. On the new content type page, click either:
 - a. **Add from existing site columns**
 - b. **Add from new site column**



Add Columns to Content Type:



2. Enter the following information:
 - a. **Select Columns:** choose a group from the **Select Columns from** drop-down menu
 - b. **Update List and Site Content Types:** choose if you want to update all content types inheriting from this type

New Site Column:

Site Actions Tessa MacKinnon

Home > Site Settings > New Site Column
Use this page to add a site column.

Home Arne Test Gregor Test Valentina Test Andrew Test Eric Test Eve test Senior Management Braeden's Demo Site Susan Test
Jinks Kaczor Dyck LLC Guillaume Test OnePlaceMail Test Steve Test Colligo Social Committee Ben Henderson Special Column Test Bernard Test
BeeDub Test test_new_site TessaTest

Libraries
Drop Off Library
Offline Library
Site Pages
brads_folders
brads_folders_2
brads_emails
lotus_notes_emails
DarylTest
DarylTest2
Susan
a new library
Test
Email Document
Library_new
New Library

Lists
Calendar
Case

Discussions
Team Discussion

Recycle Bin
 All Site Content

Name and Type
Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

Single line of text
 Multiple lines of text
 Choice (menu to choose from)
 Number (1, 1.0, 100)
 Currency (\$, ¥, €)
 Date and Time
 Lookup (information already on this site)
 Yes/No (check box)
 Person or Group
 Hyperlink or Picture
 Calculated (calculation based on other columns)
 Full HTML content with formatting and constraints for publishing
 Image with formatting and constraints for publishing
 Hyperlink with formatting and constraints for publishing
 Summary Links data
 Rich media data for publishing
 Managed Metadata

Group
Specify a site column group. Categorizing columns into groups will make it easier for users to find them.

Put this site column into:

Existing group:

 New group:

Additional Column Settings
Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:
 Yes No

Maximum number of characters:

Default value:
 Text Calculated Value

Update List and Site Content Types
Specify whether all child site and list content types using this type should be updated with the settings on this page. This operation can take a long time, and any customizations made to these values on the child site and list content types will be lost.

Update all content types inheriting from this type?
 Yes No

Column Validation

OK Cancel

3. Enter the following information:
 - a. **Name and Type**
 - i. **Column name:** enter the column name
 - ii. Choose a type of information contained in the column
 - b. **Group:** choose if the column will belong to an existing group or a new one
 - c. **Additional Column Settings**
 - i. **Description:** enter a description for the column
 - ii. **Require that this column contains information:** choose **Yes** if you require this column to be a mandatory field the user must fill out

- iii. **Maximum number of characters:** enter the maximum number of characters you want to have in this column
- iv. **Default Value:** choose **Text** or **Calculated Value**
- d. **Update List and Site Content Types:** choose if you want to update all content types inheriting from this type

After adding the columns to the Email Content Type you may choose to re-order the columns and/or make the columns hidden.

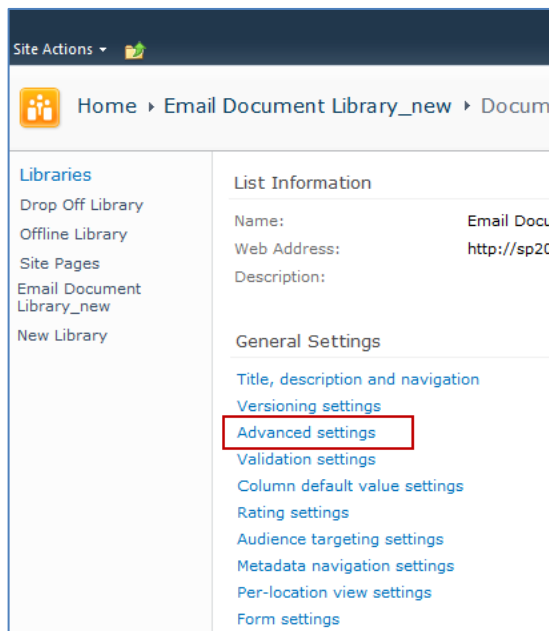
Hiding Columns

If you choose to make a column Hidden, the column is **not** displayed in the properties page of SharePoint, or Colligo Email Manager's default metadata editor dialog box.

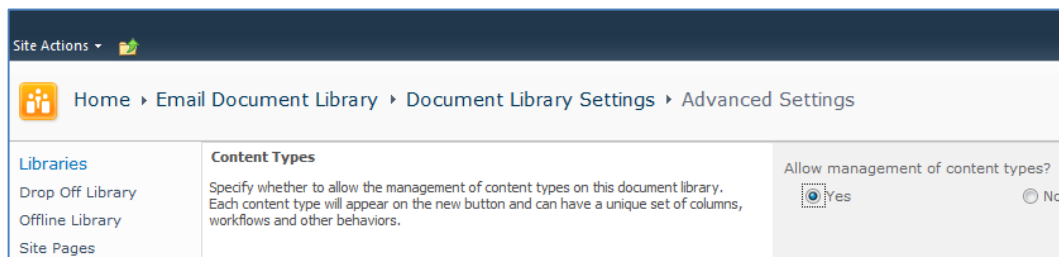
However, Colligo Email Manager still extracts metadata into any hidden columns, and they can still be displayed in views, or used for filters.

Adding a New Content Type to Library

1. In your document library, go to **Library Tools > Library** ribbon and click the **Library Settings** icon.
2. In the **General Settings** section, click the **Advanced settings** link:



3. In the **Advanced Settings** screen, ensure the **Allow management of content types** option is set to **Yes**:

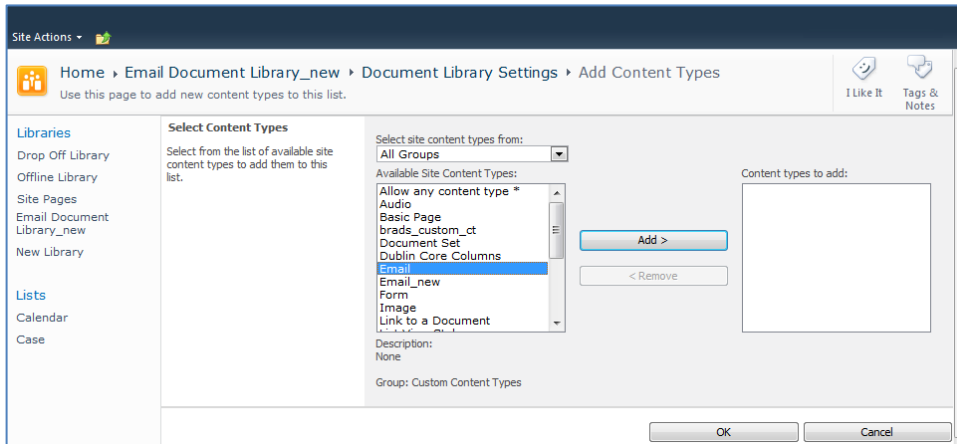


4. Click **OK** to save the changes and return to the Library Settings screen.
5. On the **Document Library Settings** screen, scroll down to the **Content Types** section:

Content Type	Visible on New Button	Default Content Type
Document	✓	

[Add from existing site content types](#)
[Change new button order and default content type](#)

- Click the **Add from existing site content types** link.
- In the **Add Content Types** screen, select a content type from the **Available Site Content Types** list, and click **Add**:



- Click **OK** to return to the **Document Library Settings** screen. The new content type displays in the **Content Types** section:

Content Type	Visible on New Button	Default Content Type
Email	✓	✓
Document	✓	

[Add from existing site content types](#)
[Change new button order and default content type](#)

Creating a Library Without Content Types

If you do not wish to use content types in your SharePoint library, you can add columns directly to the library to enable email metadata mapping. See **Enabling Metadata Extraction** for the metadata fields and default column names.

1. In your document library, go to **Library Tools > Library** ribbon and click the **Library Settings** icon.
2. In the **Document Library Settings** screen, scroll down to the **Columns** section and click **Create Column**:

Column (click to edit)	Type	Required
Title	Single line of text	
Attachment	Yes/No	
Checked Out To	Person or Group	

[Create column](#)
[Add from existing site columns](#)
[Column ordering](#)
[Indexed columns](#)

The **Create Column** screen displays:

Site Actions ▾

Home > Email Document Library_new > Document Library Settings > Create Column

Use this page to add a column to this document library.

I Like It Tags & Notes

Libraries

- Drop Off Library
- Offline Library
- Site Pages
- Email Document Library_new
- New Library

Lists

- Calendar
- Case

Discussions

- Team Discussion

Recycle Bin All Site Content

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- Single line of text
- Multiple lines of text
- Choice (menu to choose from)
- Number (1, 1.0, 100)
- Currency (\$, ¥, €)
- Date and Time
- Lookup (information already on this site)
- Yes/No (check box)
- Person or Group
- Hyperlink or Picture
- Calculated (calculation based on other columns)
- External Data
- Managed Metadata

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

- Yes No

Enforce unique values:

- Yes No

Maximum number of characters:

255

Default value:

- Text Calculated Value

Add to default view

Column Validation

OK Cancel

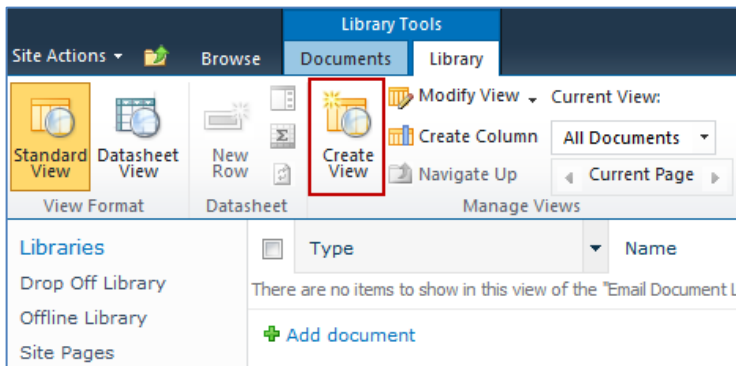
3. Enter the following information:
 - a. **Name and Type**
 - i. **Column name:** enter the column name

- ii. Choose a type of information contained in the column
- b. **Additional Column Settings**
 - i. **Description:** enter a description for the column
 - ii. **Require that this column contains information:** choose **Yes** if you require this column to be a mandatory field the user must fill out
 - iii. **Enforce unique values:** choose Yes if you want this column to have a unique value
 - iv. **Maximum number of characters:** enter the maximum number of characters you want to have in this column
 - v. **Default Value:** choose **Text** or **Calculated Value**
 - vi. **Add to default view:** check this box if you want this column to display in the default view
- 4. Click **OK**.
The new column displays in the **Columns** section in your **Document Library Settings** list.

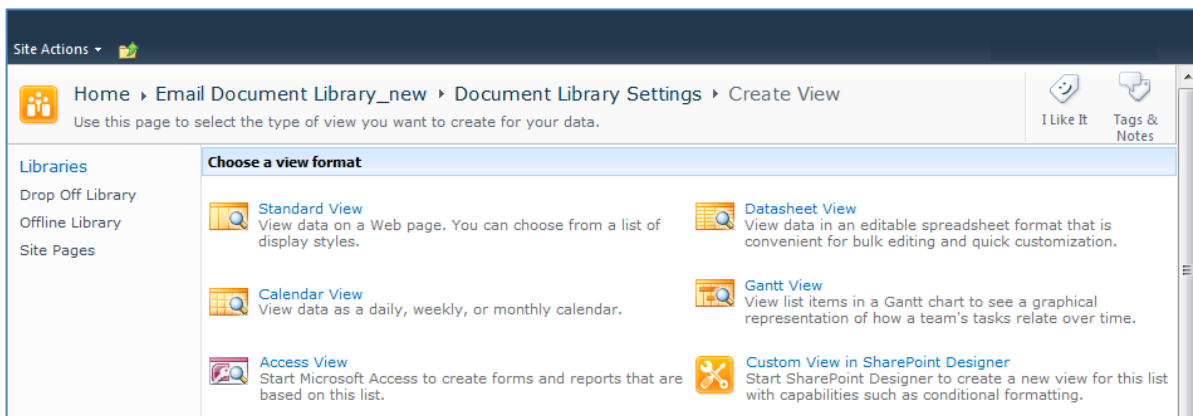
Creating an Email View

After you have defined your content type and added it to your library, it is recommended that you create an email view.

1. In your document library, go to **Library Tools > Library** ribbon and click the **Create View** icon:



The **Create View** screen displays:



2. Click the **Standard View** link.
The configuration options for the standard view display:

Site Actions ▾

Home ▸ Email Document Library_new ▸ Document Library Settings ▸ Create View

Use this page to create a view of this document library.

I Like It Tags & Notes

OK Cancel

Libraries

Drop Off Library

Offline Library

Site Pages

Email Document Library_new

New Library

Lists

Calendar

Case

Name

Type a name for this view of the document library. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.

View Name:

Make this the default view (Applies to public views only)

Audience

Select the option that represents the intended audience for this view.

View Audience:

Create a Personal View
Personal views are intended for your use only.

Create a Public View
Public views can be visited by anyone using the site.

Columns

Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the **Position from left** box.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Type (icon linked to document)	1 ▾
<input checked="" type="checkbox"/>	Name (linked to document with edit menu)	2 ▾
<input checked="" type="checkbox"/>	Modified	3 ▾
<input checked="" type="checkbox"/>	Modified By	4 ▾

Sort

Select up to two columns to determine the order in which the items in the view are displayed. [Learn about sorting items.](#)

First sort by the column:

None ▾

Show items in ascending order (A, B, C, or 1, 2, 3)

Show items in descending order (C, B, A, or 3, 2, 1)

Then sort by the column:

None ▾

Show items in ascending order (A, B, C, or 1, 2, 3)

Show items in descending order (C, B, A, or 3, 2, 1)

Sort only by specified criteria (folders may not appear before items).

Filter

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Today]** or **[Me]** as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. [Learn about filtering items.](#)

Show all items in this view

Show items only when the following is true:

Show the items when column

None ▾

is equal to ▾

And Or

When column

None ▾

is equal to ▾

[Show More Columns...](#)

Inline Editing

Tabular View

Group By

Totals

Style

Folders

Item Limit

Mobile

Adjust mobile settings for this view.

Enable this view for mobile access (Applies to public views only)

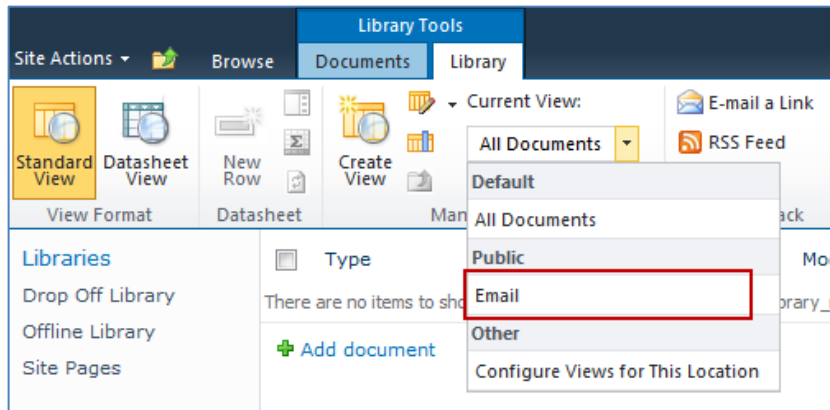
Make this view the default view for mobile access (Applies to public views only)

Number of items to display in list view web part for this view: 3

Field to display in mobile list simple view: [Name (linked to document with edit menu)] ▾

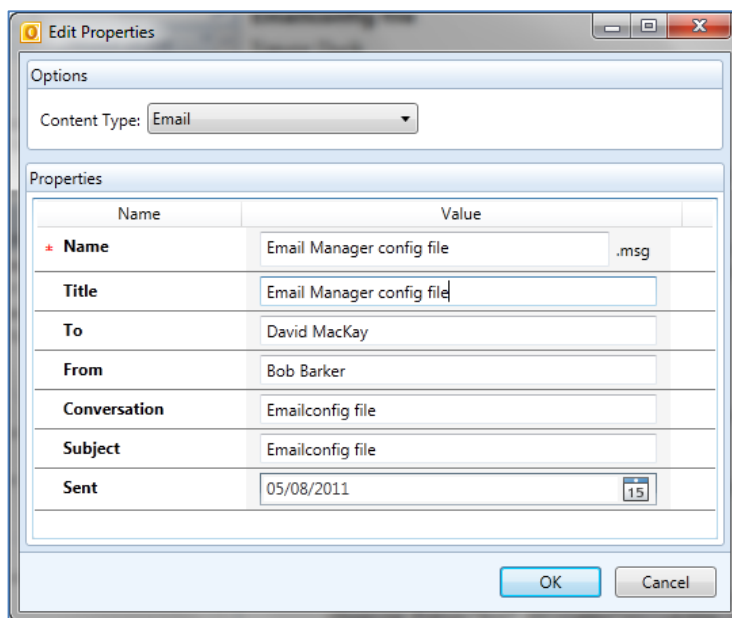
OK Cancel

3. Enter the **Name** and **Audience** for your view.
4. Click **OK**. You can now select this view from your **Current View** list in your **Library** ribbon:



Validating Metadata Extraction

To validate that your metadata is being extracted correctly, drag-and-drop an email into a Favorite or Folder location (see the [Colligo Email Manager User Guide](#)), and check that the correct metadata is being displayed and extracted in the **Edit Properties** dialog:



Changing Column Mappings

By default, the required SharePoint column display name matches the Outlook message field name shown in the table in **Manually Creating Content Types**.

The email configuration file allows you to override the default mapping of the Outlook message field name to the SharePoint column display name.

Name the file `ColligoMappingConfig.xml` and store it in one of the following locations:

Windows Vista/7:

- C:\Users\%username%\AppData\Roaming\Colligo\EmailManager\Config\
- C:\Users\%username%\AppData\Local\Colligo\EmailManager\Config\

Windows XP:

- C:\Documents and Settings\%username%\Local Settings\Application Data\Colligo\EmailManager\Config\
- C:\Documents and Settings\%username%\ApplicationData\Colligo\EmailManager\Config\

To adjust the SharePoint metadata column name for a particular Outlook message field, the SPColumn attribute of the appropriate Mapping element is changed. It is also possible to specify multiple mappings for the same message field. That is, the same field can be mapped to multiple SharePoint metadata columns.

The format of the ColligoMappingConfig.xml file is shown below:

```
<?xml version="1.0" encoding="utf-8"?>
<ColligoMappingConfig>
  <Mappings>
    <Mapping Field="Attachment" SPColumn="Attachment"/>
    <Mapping Field="Bcc" SPColumn="Bcc"/>
    <Mapping Field="Bcc-Address" SPColumn="Bcc-Address"/>
    <Mapping Field="Bcc-Type" SPColumn="Bcc-Type"/>
    <Mapping Field="Categories" SPColumn="Categories"/>
    <Mapping Field="Cc" SPColumn="Cc"/>
    <Mapping Field="Cc-Address" SPColumn="Cc-Address"/>
    <Mapping Field="Cc-Type" SPColumn="Cc-Type"/>
    <Mapping Field="Conversation" SPColumn="Conversation"/>
    <Mapping Field="From" SPColumn="From"/>
    <Mapping Field="From-Address" SPColumn="From-Address"/>
    <Mapping Field="From-Type" SPColumn="From-Type"/>
    <Mapping Field="Importance" SPColumn="Importance"/>
    <Mapping Field="Message Body" SPColumn="Message Body"/>
    <Mapping Field="Received" SPColumn="Received"/>
    <Mapping Field="Received-UTC" SPColumn="Received-UTC"/>
    <Mapping Field="Sensitivity" SPColumn="Sensitivity"/>
    <Mapping Field="Sent" SPColumn="sent"/>
    <Mapping Field="sent-UTC" SPColumn="sent-UTC"/>
    <Mapping Field="subject" SPColumn="subject"/>
    <Mapping Field="To" SPColumn="To"/>
    <Mapping Field="To-Address" SPColumn="To-Address"/>
    <Mapping Field="To-Type" SPColumn="To-Type"/>
  </Mappings>
</ColligoMappingConfig>
```

ENABLING SEARCH IN A SHAREPOINT SITE

Colligo Email Manager is compatible with Microsoft FAST Search Server 2010 for SharePoint.

Installing FAST Search for SharePoint

Follow the instructions at the following location:

<http://technet.microsoft.com/en-us/library/ff381243.aspx>

Adding Searchable Columns in SharePoint

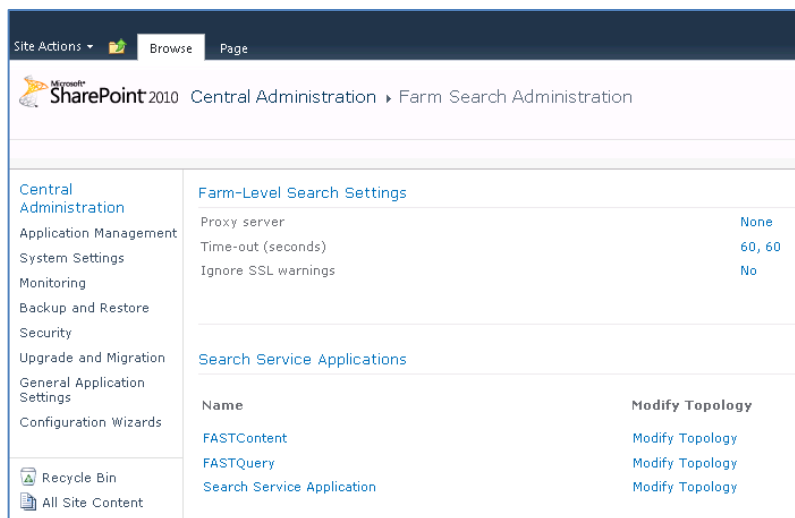
Colligo Email Manager provides the ability to search on SharePoint metadata (columns). For example, when searching for email, it is desirable to search on email properties such as “To”, “From” and “Subject”. To enable this functionality, SharePoint must be configured to index the columns that you would like to allow users to search on.

1. In an existing SharePoint site, go to **Library Settings**.
2. Under the **Columns** section, choose **Create Column**.
3. Add a column for every field that you want to be searchable.
NOTE: create columns with lower case names with no special characters or white spaces. This file naming convention allows you to use the same FAST Search mapping property names as site column names.
4. Upload at least one document to the library with each metadata column filled out in order for the search crawler to register any new columns.

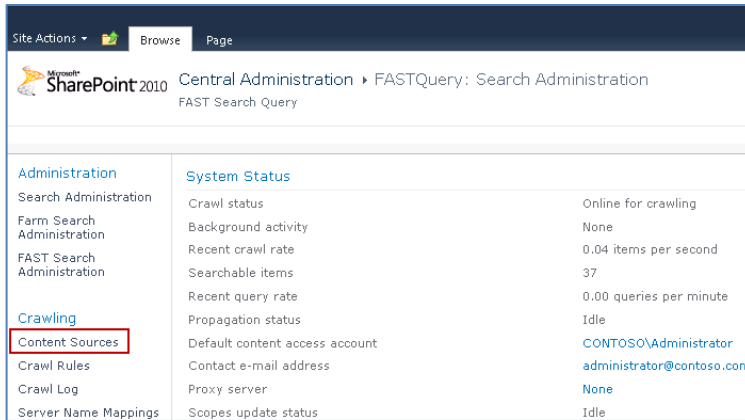
ADDING MANAGED PROPERTY MAPPINGS

To add managed property mappings:

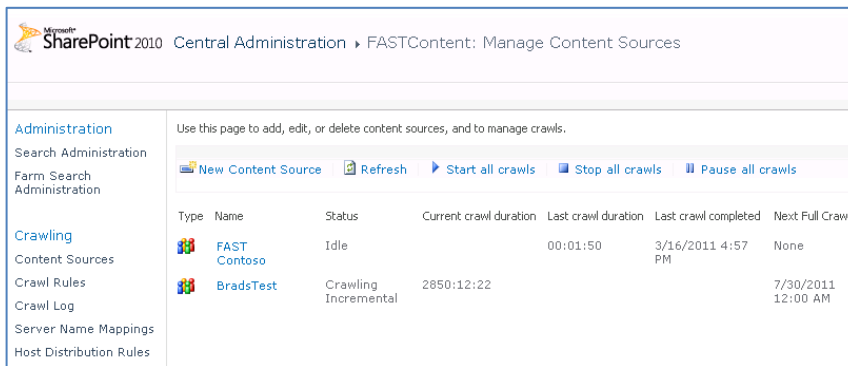
1. In SharePoint’s **Central Administration**, go to **General Application Settings > Farm Search Administration**.



2. Click **FASTContent**.
The **FASTQuery: Search Administration** page displays.
3. In the **Crawling** section, click **Content Sources**.



The **Manage Content Sources** page displays:



- If a content source is not configured, click **New Content Source** to configure one. The **Add Content Source** page displays:

Site Actions ▾
Brad Lawther ▾

SharePoint 2010

I Like It
Tags & Notes

Central Administration
▶ FASTContent: Add Content Source
?

Administration

Search Administration

Farm Search Administration

Crawling

Content Sources

Crawl Rules

Crawl Log

Server Name Mappings

Host Distribution Rules

File Types

Index Reset

Crawler Impact Rules

Reports

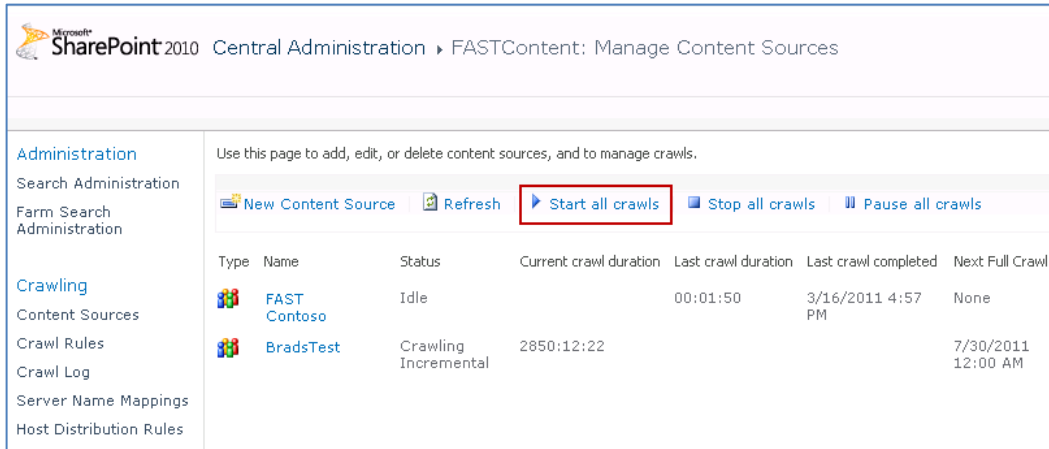
Administration Reports

Use this page to add a content source.

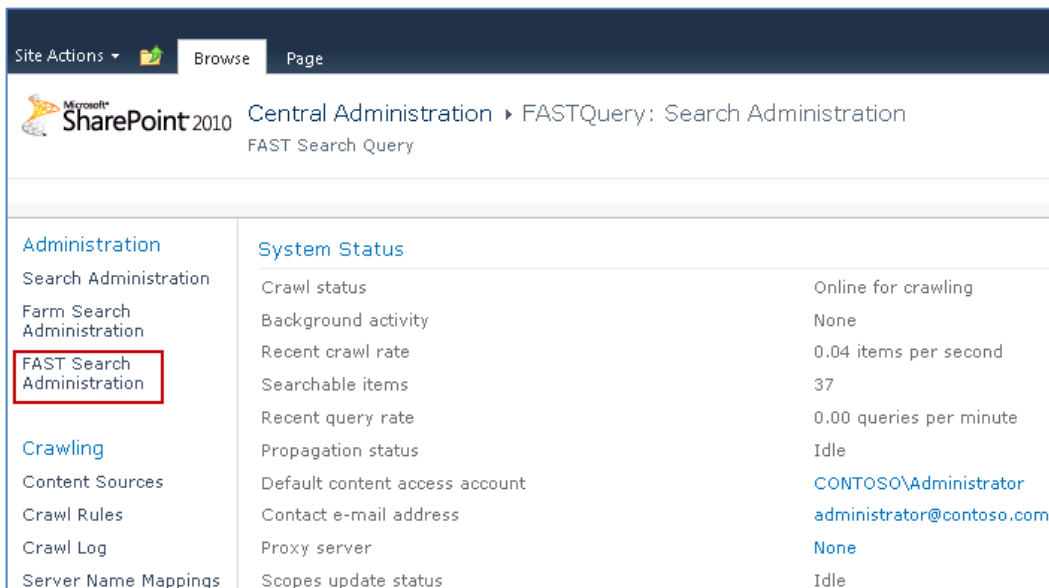
* Indicates a required field

Name Type a name to describe this content source.	Name: * <input style="width: 95%;" type="text"/>
Content Source Type Select what type of content will be crawled. <small>Note: This cannot be changed after this content source is created because other settings depend on it.</small>	Select the type of content to be crawled: <input checked="" type="radio"/> SharePoint Sites <input type="radio"/> Web Sites <input type="radio"/> File Shares <input type="radio"/> Exchange Public Folders <input type="radio"/> Line of Business Data <input type="radio"/> Custom Repository
Start Addresses Type the URLs from which the search system should start crawling. This includes all SharePoint Server sites and Microsoft SharePoint Foundation sites.	Type start addresses below (one per line): * <div style="border: 1px solid #ccc; height: 60px; margin: 5px 0;"></div> Example: http://intranetsite
Crawl Settings Specify the behavior for crawling this type of content. <small>Selecting to crawl everything under the hostname will also crawl all the SharePoint Sites in the server.</small> <small>Caution: After you select crawl settings for a SharePoint content source, you cannot change crawling behavior unless you re-create the content source. Verify that you select the option that best suits your needs.</small>	Select crawling behavior for all start addresses in this content source: <input checked="" type="radio"/> Crawl everything under the hostname for each start address <input type="radio"/> Only crawl the Site Collection of each start address
Crawl Schedules Select the crawl schedules for this content source.	Select the schedule that this should be a part of: Full Crawl <input type="text" value="None"/> ▼ Create schedule Incremental Crawl <input type="text" value="None"/> ▼ Create schedule
Content Source Priority Select what the priority of this content source should be. The Crawl system will prioritize the processing of 'high' priority content sources over 'Normal' priority content sources	Select the priority for this content source: Priority: <input type="text" value="Normal"/> ▼
Start Full Crawl Select "Start full crawl of this content source" and click "OK" to start a full crawl of this content source.	<input type="checkbox"/> Start full crawl of this content source

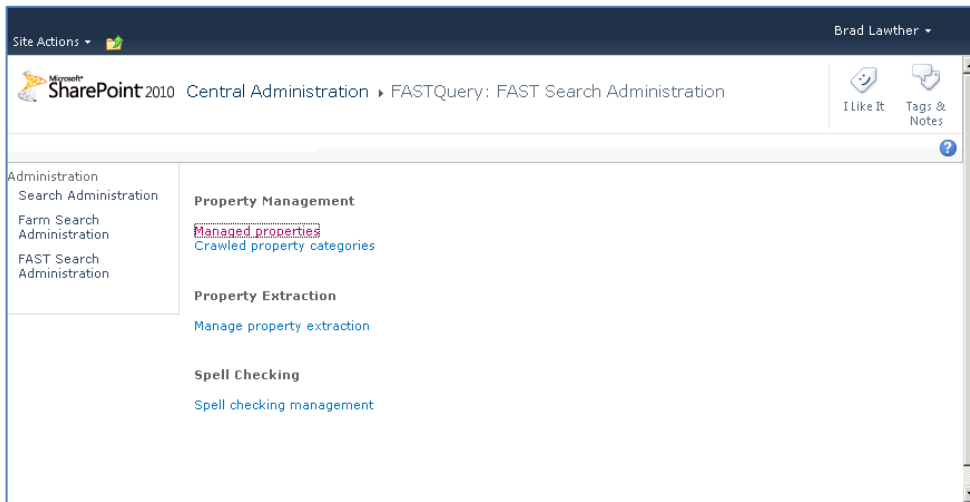
- After you have added the new content source, return to the **Manage Content Sources** page, and click **Start All Crawls**.



- Wait until all crawls are completed.
- Return to the **Central Administration** and navigate to **General Application Settings > Farm Search Administration**.
- Click **General Application Settings > Farm Search Administration > FastQuery**.
- In the **Administration** section, click **FAST Search Administration**.

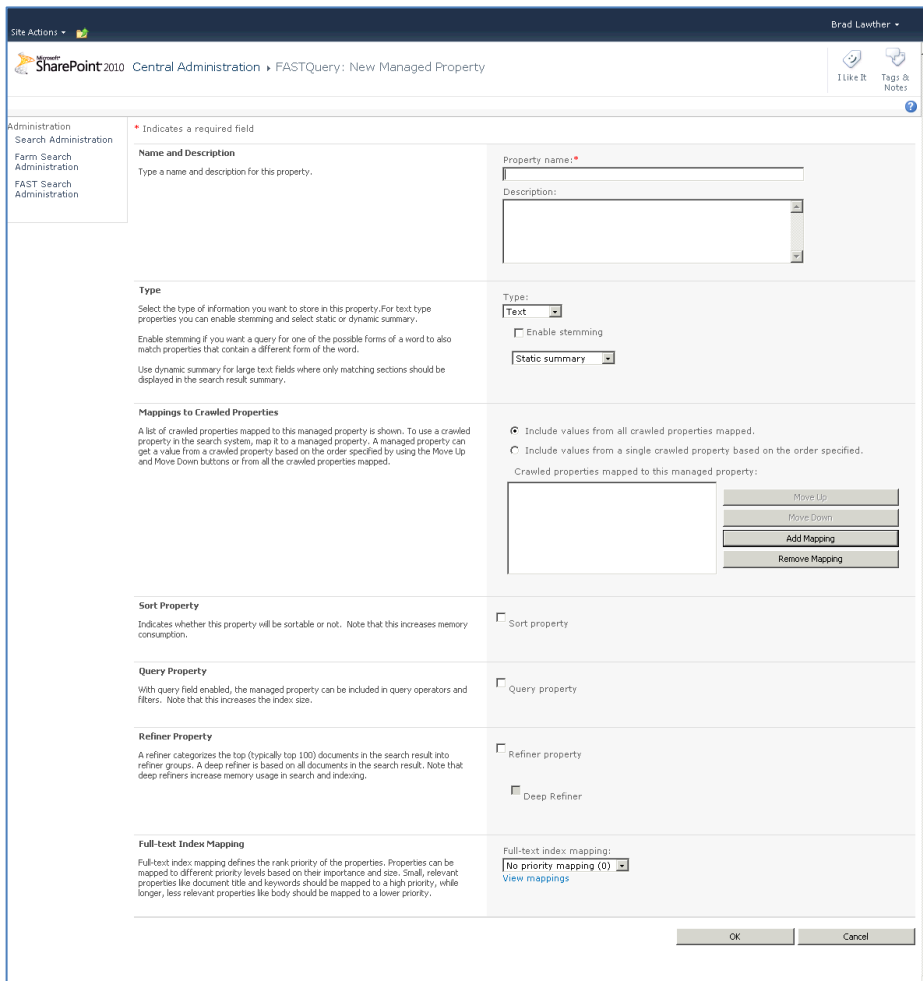


The **FAST Search Administration** screen displays:



10. Click **Managed Properties > Add Managed Property**.

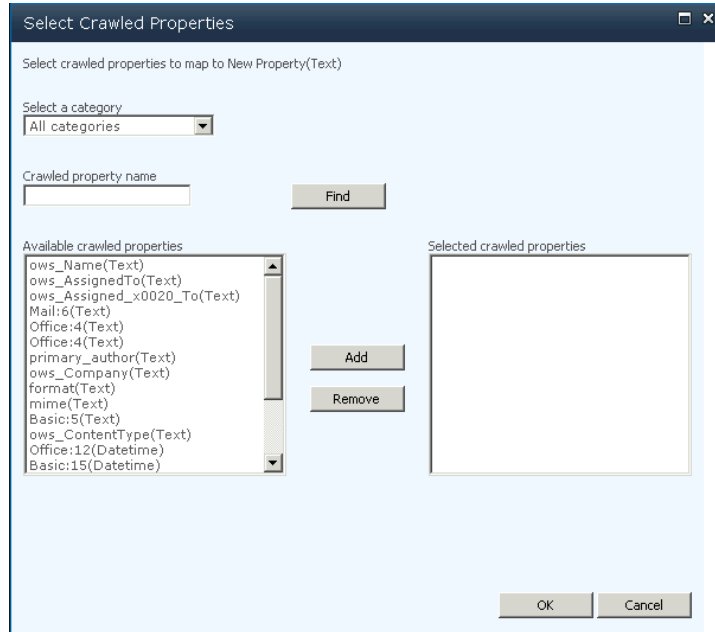
The **New Managed Property** screen displays:



11. Fill out the following fields:

- a. **Property name:** ensure the name has no spaces or special characters
- b. **Type:** choose the appropriate type
- c. **Mappings to Crawler Properties:** click **Add Mapping**

The **Select Crawled Properties** screen displays:



- i. Select a property in the **Available crawled properties** list and click **Add** to move it to the **Selected crawled properties** list.
 - ii. Repeat for each column you want to make available on a search query.
 - iii. Click **OK** when complete.
- d. **Query Property:** check the **Query Property** checkbox.
 - e. Click **OK**.

Enabling the IsDocument Property

The IsDocument property is a default SharePoint property that is true for all document types. You must configure the property before it can be used in a search.

1. In SharePoint's **Central Administration**, go to **General Application Settings > Farm Search Administration**.
2. Click **FASTQuery**.
3. In the **Queries and Results** section, click **Metadata Properties**.
4. Set the Managed Property **IsDocument** to True.
5. Click **OK**.

Configuring Local Machines

1. Create the `ColligoMappingConfig.xml` file on a local machine in one of the following directories:

Windows Vista/7:

- `C:\Users\%username%\AppData\Roaming\Colligo\EmailManager\Config\`
- `C:\Users\%username%\AppData\Local\Colligo\EmailManager\Config\`

Windows XP:

- `C:\Documents and Settings\%username%\Local Settings\Application Data\Colligo\EmailManager\Config\`
- `C:\Documents and Settings\%username%\ApplicationData\Colligo\EmailManager\Config\`

2. Use the crawler mapping names to populate the configuration file.

NOTE: Columns are case sensitive

```
<?xml version="1.0" encoding="utf-8"?>
<ColligoMappingConfig>
  <Mappings>
    <Mapping Field="Attachment" SPColumn="Attachment"/>
    <Mapping Field="Bcc" SPColumn="Bcc"/>
    <Mapping Field="Bcc-Address" SPColumn="Bcc-Address"/>
    <Mapping Field="Bcc-Type" SPColumn="Bcc-Type"/>
    <Mapping Field="Categories" SPColumn="Categories"/>
    <Mapping Field="Cc" SPColumn="Cc"/>
    <Mapping Field="Cc-Address" SPColumn="Cc-Address"/>
    <Mapping Field="Cc-Type" SPColumn="Cc-Type"/>
    <Mapping Field="Conversation" SPColumn="Conversation"/>
    <Mapping Field="From" SPColumn="From"/>
    <Mapping Field="From-Address" SPColumn="From-Address"/>
    <Mapping Field="From-Type" SPColumn="From-Type"/>
    <Mapping Field="Importance" SPColumn="Importance"/>
    <Mapping Field="Message Body" SPColumn="Message Body"/>
    <Mapping Field="Received" SPColumn="Received"/>
    <Mapping Field="Received-UTC" SPColumn="Received-UTC"/>
    <Mapping Field="Sensitivity" SPColumn="Sensitivity"/>
    <Mapping Field="Sent" SPColumn="Sent"/>
    <Mapping Field="Sent-UTC" SPColumn="Sent-UTC"/>
    <Mapping Field="Subject" SPColumn="Subject"/>
    <Mapping Field="To" SPColumn="To"/>
    <Mapping Field="To-Address" SPColumn="To-Address"/>
    <Mapping Field="To-Type" SPColumn="To-Type"/>
  </Mappings>
</ColligoMappingConfig>
```

UNINSTALLING COLLIGO EMAIL MANAGER

To uninstall, Colligo Email Manager, complete the following steps:

- 1) In your Control Panel, choose **Uninstall a Program** from the **Programs** group.
- 2) Select Colligo Email Manager in the program list and click **Uninstall**.