Colligo Email Manager 5.1

User Guide



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ENTERPRISE EMAIL MANAGEMENT FOR SHAREPOINT 2010

Welcome to Colligo Email Manager, the simple, powerful, and reliable solution to enterprise email management in Microsoft SharePoint 2010. Featuring seamless integration with Microsoft Outlook, Colligo Email Manager makes it fast and easy to file, tag, find, view, and share email and attachments in Share-Point, all from within the familiar Outlook interface.

Colligo Email Manager streamlines SharePoint interaction by providing simple, intuitive ways to move or copy email and attachments to SharePoint from Outlook, including drag-and-drop or send-and-file. Email metadata is automatically captured for findability, and additional metadata can be easily added to classify content according to corporate guidelines or regulatory requirements. The integrated search functionality searches both SharePoint and Outlook to locate emails, or find documents to send as attachments. SharePoint sites can also be viewed from within Outlook, making finding content a breeze.

Benefits

- Easily manage email and documents in SharePoint, without changing work habits
- Increase the quality and quantity of content captured and tagged in SharePoint
- Reduce risk, improve compliance, and records retention
- Reduce uncontrolled content in personal archives and PSTs
- Improve collaboration, document, and project management
- Drive SharePoint adoption of by improving ease of use

Key Features

- File: Drag-and-drop email and attachments to SharePoint from Outlook
- Tag: Add automatic or customized metadata
- Find: Search Outlook and SharePoint together
- View: See SharePoint content right inside Outlook
- Share: Replace attachments with links for easy collaboration

Platforms Supported

- SharePoint 2010 and SharePoint 2010 Online (Office 365)
- Outlook 2007 and 2010 (32-bit and 64-bit)
- Windows XP, Windows Vista, or Windows 7

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 COLLIGO EMAIL MANAGER

To install and activate Colligo Email Manager:

- 1. Double-click to open the Colligo Email Manager XX.zip file and extract the contents.
- 2. In the folder, double-click the folder that corresponds to your operating system:
 - a. **x86**: choose this option if you have a 32-bit operating system
 - b. **x64**: choose this option if you have a 64-bit operating system
- 3. Double-click either Setup.exe or ColligoEmailManager_xNN.msi.
- 4. Follow the steps in the install wizard.
- 5. After installation is complete, enter your information to activate the software. If you do not activate Colligo Email Manager, the Outlook add-in does not display.
- 6. If you are unable to connect to the activation server, the following error message displays:

Colligo Email Man	ager 🗾						
To complete your installation, please complete the fields below and click Activate. Your privacy is important to us, and your personal information will never be shared with third parties.							
Name:	Dave MacKay						
Organization:	Pacific Sands Inc.						
Email address:	dmackay@email.com						
😵 Unable to con or activate by	email. Activate Activate by Email						

NOTE: The inability to connect could be due to firewall settings in your corporate network or a dropped internet connection. If the connection issue is temporary, Colligo advises to attempt activating at a later time before trying activation by email.

7. Click Activate by Email to launch the following email:

1	21 🛃 🖻	(4 4 4)	🗣 Activation Request - Message (Plain Text)	×
	File	Message	Insert Options Format Text Review	۵ 🕜
	Paste	■ B <i>I</i>		
ŀ	Elipboard	Fa .	Basic Text 🕞 Names Include Tags 🗟 Zoom	
l		From 🔻	dmackay@colligo.com	
l	Send	То	support@colligo.com	
l	Sena	Cc		
l		Subject:	Activation Request	
l		Attached:	ActivationRequest.txt (440 B)	
	User na Organia Email: d	ame: Dave M zation: Pacific dmackay@er	c Sands Inc.	▲
L				

- 8. Click Send.
- 9. You will receive a response from Colligo Technical Support with instructions for manual activation.

After Colligo Email Manager is installed, a new group called **Colligo Email Manager** displays in the lefthand pane in Microsoft Outlook:

Favorites	<
🔁 Inbox	
📴 Sent Items	
Deleted Items	
DMackay@colligo.com	
Colligo Email Manager	
Deleted Items	
> 🚖 Favorites	
Folders	
Recovered Items	
🧔 Search Folders	
Outlook Data File	
🖂 Mail	
Calendar	
Contacts	
🗳 Tasks	
	- 🔊 🛋

You can now add SharePoint sites and designate folder locations for your Favorites and Folders lists.

NOTE: If you have Colligo Contributor Add-in for OutlookTM 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: <u>http://www.colligo.com/support/kb/uninstall-add-in-for-outlook</u>

MANAGING SHAREPOINT SITES

Colligo Email Manager lets you connect to SharePoint sites through Outlook. You can add, edit, and remove sites, as well as add folders to your Favorites and Folders lists.

Adding a SharePoint Site

You can add a SharePoint site to Colligo Email Manager in one of two ways:

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

Using the SharePoint Sites Dialog in Outlook

 In the Colligo Email Manager group on the Home tab in Outlook 2010, or, in the Colligo Toolbar in Outlook 2007, click the Colligo drop-down arrow and select Configure.

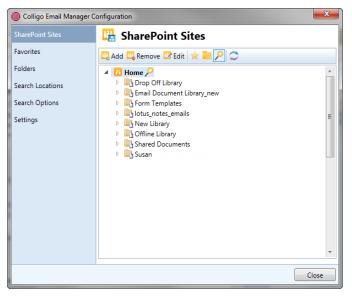
The SharePoint Sites dialog displays:

Colligo Email Manager Co	onfiguration
SharePoint Sites	👫 SharePoint Sites
Favorites	🖽 Add 🛄 Remove 📴 Edit 🌟 🚞 🔎 💭
Folders	Add SharePoint Site
Search Locations	
Search Options	
Settings	
	Close

Click the Add SharePoint Site link or the Add icon.
 The Add SharePoint Site dialog displays:

	Add SharePoint Site	
	URL:	
	Examples: http://server/workspace https://secureserver/workspace	
l	Server Authentication	
	Ose default credentials	
	Use the following credentials:	
	User name: User	
L	Password:	
l	Domain: USER-VAIO	
	OK Cancel	

- 3. Enter the following information in the dialog:
 - a. **URL**: enter the web address of the SharePoint site you want to add. You can type or copy-and-paste the address, or drag-and-drop an address from Internet Explorer into the field.
 - b. In the Server Authentication section, choose one of the following options:
 - a. Use default credentials: select this option to choose default Windows credentials
 - b. **Use the following credentials:** select this option to enter userspecific credentials and enter the following information:
 - a. Username
 - b. Password
 - c. **Domain**
- 4. Click **OK**. The site displays in the list. You can expand the site to see the subfolders:



Using the Connect to Colligo Email Manager Button in Internet Explorer

You can add a SharePoint site or library to Colligo Email Manager directly from Internet Explorer using the Connect to Colligo Email Manager button.

To add a site with the Connect to Colligo Email Manager button:

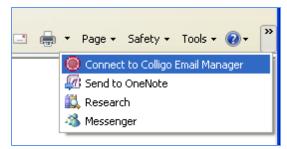
1. Navigate to the SharePoint site or library that you want to add to Colligo Email Manager and click the **Connect to Colligo Email Manager** button:

Internet Explorer 9:



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

Internet Explorer 8:



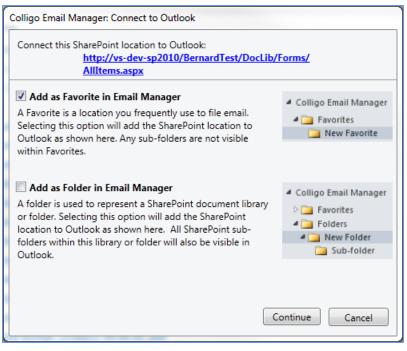
2. If you are logged in with your default credentials, you are not prompted for a username and password.

If not, you are prompted for your login credentials with the **Connect to Outlook** screen:

Colligo Email Manager: Connect to Outlook Connect this SharePoint location to Outlook: <u>http://sp2010rc.corporate.local/DropOffLibrary/</u> <u>Forms/AllItems.aspx</u>								
User name:								
Password:								
Domain:								
		Continue	Cancel					

3. Enter your login information and click **Continue**.

The following screen displays.



4. Check the Add as Favorite in Email Manager box to add the location to your Favorites list.

NOTE: If you are adding a site-level location, the option to add it as a Favorite does not display.

- 5. Check the Add as Folder in Email Manager box to add the location to your Folders list.
- 6. When the connection is complete, the site or library now displays in your **SharePoint Sites** list and, depending on which boxes you checked, your **Folders** and/or **Favorites** list in Colligo Email Manager.

Enabling the Command Bar in IE 9

In Internet Explorer 9, the Command bar is disabled by default. To see Colligo Email Manager's **Connect** to **Colligo Email Manager** button, the Command bar must be enabled and visible.

To enable the Command bar:

1. Right-click in the white space at the top of your browser window:

× Google	10rc.corporate.local/default.aspx		Menu bar Favorites bar Command bar		
Site Actions 🔹 📦 Brow	se Page	<	Status bar Yahoo! Toolbar Google Toolbar uTorrentBar Toolbar Conduit Engine		
Home Arne Test G Jinks Kaczor Dyck LLC BeeDub Test	regor Test Valentina Test Andrew Test Eric Test Eve test Senior Management E Guillaume Test OnePlaceMail Test Steve Test Colligo Social Committee Ben Hender		Snagit AVG Security Toolbar Lock the toolbars		Sea
Libraries Drop Off Library Offline Library Site Pages	Announcements There are currently no active announcements. To add a new announcement, click "Add new announcement".	a	Show tabs on a separate row Restore Move		
Site Pages brads_folders brads_folders_2 brads_emails	Add new announcement Shared Documents	- 	Size Minimize Maximize	Alt+F4	rs
lotus_notes_emails	Turse Name Medified	_	Medified Ru	COF	REORATE

2. Select the **Command bar** option.

The Command bar displays at the top of your browser.

Removing a Site

To remove a site from the Colligo Email Manager group:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the **SharePoint Sites** list, click the site you want to remove and click **Remove**.

A dialog asks for confirmation of the deletion.

NOTE: removing a site removes all search locations, favorites, folders, and history items referencing the site.

3. Click **OK** to continue with the removal, or **Cancel** to retain the site.

Editing a Site

To edit a site in the Colligo Email Manager group:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the SharePoint Sites list, click the site you want to edit and click Edit.

The Edit SharePoint Site dialog displays.

- 3. Edit the fields as necessary. See Adding a SharePoint Site for a description of the fields.
- 4. Click OK.

Adding a Folder to the Favorites List

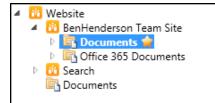
You can add your most frequently used SharePoint folder locations to your Favorites list in your Colligo Email Manager list. A folder in your Favorites list is a link to that folder only; if there are any subfolders underneath that folder, you cannot navigate to them in the list. If you want to add a top-level folder and its subfolder, you need to add them separately. This differs from folders in your Folders list, which do include subfolders.

You can add a SharePoint site to your Favorites list in one of two ways:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the SharePoint Sites list, select the site and the folder within the site that you want to

add to your Favorites and click the Add Favorite icon:

The folder displays with the Favorites star beside it:



OR

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- In the left-hand pane of the Colligo Email Manager Configuration dialog, select Favorites. The Favorites dialog displays:

🔘 Colligo Email Manager Co	onfiguration
SharePoint Sites	🚖 Favorites
Favorites	📩 Add 📜 Remove
Folders	Add Favorite
Search Locations	
Search Options	
Settings	
	Close

3. Click the **Add Favorite** link or the **Add** icon.

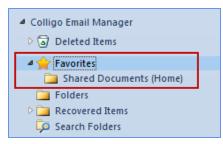
The **Add Favorite** dialog displays.

Add Favorite		X	J
0]
Home			1
			l
Selected location:			
	OK	Cancel	

4. Browse to the location of the folder you want to add to your Favorites list, and click **OK**.

NOTE: if you right-click **Favorites** under the Colligo Email Manager list, you can select **Add Favorite** from the contextual menu and the above dialog displays.

Any folders added display under Favorites in the Colligo Email Manager list:



You can now use the folders to view, upload, and download your SharePoint files. Click on a folder to view its contents:

Favorites Favorites G Inbox Deleted Items	Site Actions -	Lib Docume	ents Library	Home Out	look Team Sit	e		Us	Bob F er Settings 👻 💁
Outlook Data File Colligo Email Manager Deleted Items		U	te → Office 365 Do	cuments ► All Doo	cuments -	Sea	rch this site		
Favorites									
Documents (Website)	Libraries	📄 Туре	Name	Modified	Modified By	Subject	То	From	Conversation
Office 365 Documents (Website > Benł	Office 365 Documents		Pics	6/22/2011 6:39 AM	Ben Henderson				
Web Pages (Website) Folders Folders Comments (Website) Recovered Items Search Folders	Site Pages Team Site Home [+ Add New Page]	â	01 00 NATURAL GAS NOMINATION	5/17/2011 9:12 AM	Ben Henderson	01/00 NATURAL GAS NOMINATION	David Bush; Mark Diedrich; Paul Fox; David M Johnson; Robert Lee; Thomas Meers	Michael Mitcham	01/00 NATURAL GAS NOMINATION
Mail	Documents		11 18.46.41_4.3 update	6/27/2011 1:08 PM	Bob Barker	4.3 update		Dave MacKay	
Calendar Contacts Tasks	All Site Content		23 rd noms	5/17/2011 9:12 AM	Ben Henderson	23 rd noms		Ami Chokshi	23 rd noms
	•			III			Carlos J		

NOTE: you can also add a folder to your Favorites list by right-clicking on a folder under the Folders list and selecting **Add as Favorite** from the contextual menu:

Remove this Folder	
Add as Favorite	1
Refresh	l

NOTE: if you are accessing an Office 365 site, an additional prompt for your password displays. This prompt will continue to display each time you re-launch Outlook unless you check the **Keep me signed in** box:

Favorites Favorites Sent Items Deleted Items	Office 365	
 > Outlook Data File > tessamackinnon@shaw.ca > Colligo Email Manager ③ Deleted Items ⇒ Decuments (Website) ■ Folders ■ Documents (Website) ■ Templates (Website) > ■ Recovered Items ↓ Search Folders 	Access email and calendars from mobile devices • Access email and calendars from mobile devices • Create Websites to share documents, contacts, and task • Work with Office documents from virtually anywhere with Learn more	
Mali Calendar Contacts Tasks		Sign in with a different Microsoft Online Services ID

Removing a Folder from the Favorites List

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Favorites**.

The **Favorites** dialog displays.

3. Select the folder you want to remove and click **Remove**.

The folder is removed from your Favorites list and from the Colligo Email Manager section in your Outlook Task Pane.

NOTE: you can also remove a Folder from your Favorites list by right-clicking the Folder in your Favourites list in Outlook and selecting **Remove this Favorite** from the contextual menu:

Ē	Remove this Favorite	7
	Add as Folder	h
	Refresh	

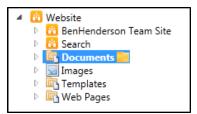
Adding a Folder to the Folders List

When you add a folder to your Folders list in your Colligo Email Manager group in the left pane of Microsoft Outlook, you are adding the folder and any subfolders it contains. If you want to move or copy an email to a folder in your Folders list, you can navigate through the subfolders to the location where you want to file your email. This differs from folders in your Favorites list, which do not include the folder hierarchy.

You can add a folder to your Folders list in one of two ways:

- In the Colligo Email Manager group on the Home tab in Outlook 2010, or, in the Colligo Toolbar in Outlook 2007, click the Colligo drop-down arrow and select Configure.
- 2. In the **SharePoint Sites** list, select the site and the folder within the site that you want to add to your Folders list and click the **Add Folder** icon:

The folder displays with the folder icon beside it:



OR

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- In the left-hand pane of the Colligo Email Manager Configuration dialog, select Folders. The Folders dialog displays:

ſ	🔘 Colligo Email Manager Co	onfiguration	1
	SharePoint Sites	E Folders	
	Favorites	SAdd Nemove	
	Folders	Add Folder	
ļ	Search Locations		
	Search Options		
	Settings		
		Close	

3. Click the Add Folder link or the Add icon.

The Add Folder dialog displays:

Add Folder	×
0	
D 🚹 Home	
Selected location: Home	
	OK Cancel

NOTE: if you right-click **Folders** under the Colligo Email Manager list in Outlook, you can select **Add Folder** from the contextual menu and the above **Add Folder** dialog displays.

4. Browse to the folder you want to add to your Folders list and click **OK**.

Any folders added display under Folders in the Colligo Email Manager list:



NOTE: you can also add a Folder by right-clicking on a folder under your Favorites list and selecting **Add as Folder** from the contextual menu:



NOTE: As a best practice, it is recommended that you do not add folders with more than 50 subfolders to your Folders list, as they will take a long time to populate and refresh. If there is a top-level folder that has a number of subfolders to which you frequently file emails, it is recommended that you use the **Move** or **Copy** buttons and browse to the SharePoint location, rather than using the Folders list in your Outlook pane.

Removing a Folder from Folders List

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Folders**.
- 3. Select the folder you want to remove and click **Remove**.

The folder is removed from your Folders list.

NOTE: you can also remove a folder by right-clicking on a folder under the Folder list in Outlook and selecting **Remove this Folder** from the contextual menu:

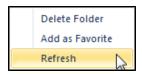
Remove this Folder
Add as Favorite
Refresh

Refreshing a Site

To refresh a site in the Colligo Email Manager list:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. Click on the site you want to refresh and click the **Refresh** icon:

NOTE: you can also refresh a folder by right-clicking on a folder under either your Folder list or Favorites list in Outlook and selecting **Refresh** from the contextual menu:



MANAGING SETTINGS

To manage your settings:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Settings**.

The **Settings** dialog displays:

🔘 Colligo Email Manager Co	Colligo Email Manager Configuration							
SharePoint Sites	😃 Settings							
Favorites	History and Favorite Limits							
Folders	Number of History items: 1	10						
Search Locations								
Search Options	Number of Favorite items: 1	10						
Settings								
	Drag-and-Drop Behavior	Send-and-File Behavior						
	Copy to SharePoint	Copy to SharePoint						
	Move to SharePoint	O Move to SharePoint						
	Logging							
	Log level: Normal	•						
	Log file: Open log file location							
		Close						

- 3. In the **History and Favorites Limits** section, enter the maximum number of items you want to display in the following lists:
 - a. Number of History items
 - b. Number of Favorite items

NOTE: the History and Favourite items numbers must be between five and 50.

- 4. In the **Drag-and-Drop Behavior** and the **Send-and-File Behavior** sections, choose one of the following options:
 - a. **Copy to SharePoint**: choose this option if you want to retain a copy of the email in Outlook as well as filing a copy in SharePoint
 - b. **Move to SharePoint**: choose this option if you want to move the email to Share-Point without retaining a copy in Outlook
- 5. The **Logging** section allows you to set the level of detail you want to have in your error log files. These log files assist Colligo technical staff in solving any issues that may arise while using Colligo Email Manager.

In the **Logging** section, select the preferred option from the **Log level** drop-down menu:

- a. **Off**: select this option if you don't want to log any information about any activity errors or warnings
- b. Normal: select this option to log information about activity, errors, and warnings

NOTE: this is the default logging level

- c. **Verbose**: select this option to include more detail about activity, errors, and warnings
- d. **Verbose with Web Services**: select this option to include the most detailed level of information about activity, errors, and warnings.

NOTE: choosing this option creates a very large log file and may slow the performance of your system

6. In the **Logging** section, click **Open log file location** to access the log files.

MANAGING EMAILS

You can drag-and-drop, move, or copy emails from Outlook into SharePoint folders.

Dragging and Dropping Email

When you drag-and-drop an email to a SharePoint folder, the default behavior is to create a copy of the email in that location while retaining the original in your Outlook account. You can change this behavior in the **Settings** dialog. See <u>Managing Settings</u>.

NOTE: if you have a folder in your Folders list that has numerous subfolders that you have to scroll through to find the folder to drag-and-drop your email into, it is easier to use the **Move/Copy** buttons and use the filter feature to isolate the folder. See Moving or Copying Email.

To drag-and-drop an email to a SharePoint folder:

- 1. Select the email you want to move to a SharePoint location.
- 2. Click and drag the selected email to a folder in your Favorites or Folders list.

The Edit Properties dialog displays:

O Edit Properties		X					
Options							
Content Type: Document							
Properties							
Name	Value	*					
* Name	Colligo Networks_01Jun11 06.40.46_Webinar Tc .msg						
Title	Webinar Tomorrow: Unleashing SharePoint 2010 for R						
То	Dave Mackay						
From	Colligo Networks						
Subject	Webinar Tomorrow: Unleashing SharePoint 2010 for R	_					
Всс							
Сс							
EmIDate	Select a date	-					
	ОК	incel					

- 3. In the **Options** section, choose the **Content Type** from the drop-down menu.
- 4. In the **Properties** section, modify the fields as preferred.

The property fields are inherited from the SharePoint library you are moving your email into. Most SharePoint 2010 metadata is supported, including Enterprise Managed Metadata (taxonomies, keywords). Email properties such as To, From, and Subject are automatically extracted. The **Title** field auto-populates with the **Subject** of the email. This can be configured for your specific needs (see Administrator's Guide). For more information, see Using Managed Metadata.

5. Click **OK** to complete the process.

 Favorites Outlook Data File 	Office 365				Home Out	look Team Si	te				Bob Bar _{Sign}
 DMackay@colligo.com Colligo Email Manager 	Site Actions 👻 🔒 Brow	wse Do	Library T ocuments	ools Library						User S	ettings 👻 🖢
 Deleted Items Favorites bradsTest (test) 	New Upload Document + Document +	New Folder E	Edit	ोक Check Out ेब Check In बेजे Discard Check Out	View Edit Properties	 Q E-mail a Lir Q Alert Me → X 		Workfle	ows Publish	8	gs & otes
 ☐ Office 365 ☐ Folders ▷ ☐ Recovered Items ↓ Garch Folders 	Site Pages Team Site Home [+ Add New Page]	Ø	01	n & Check Out DO NATURAL GAS MINATION	Manage 5/17/2011 9:12 AM	Share & Track	Copies 01/00 NATURAL GAS NOMINATION	David Bush; Mark Diedrich; Paul Fox; David M Johnson; Robert Lee; Thomas Meers	Vorkflows Michael Mitcham	Tags and N 01/00 NATURAL GAS NOMINATION	S
	Documents] 11 upd	18.46.41_4.3 ate ∷NEW	6/27/2011 1:08 PM	Bob Barker	4.3 update	All-Staff	Dave MacKay		John
	All Site Content	Ø	23 ו	rd noms	5/17/2011 9:12 AM	Ben Henderson	23 rd noms	Daren J Farmer; George	Ami Chokshi	23 rd noms	

The email message displays in the folder:

Filing Emails to a Drop-Off Library

You can drag-and-drop, send-and-file, move or copy an email to a Drop-Off Library destination.

When you file an email to a drop-off library location, the following message displays in the **Edit Properties** screen:

Edit Properties							
Content Organizer: Documents uploaded here are automatically moved to the correct library and folder after document properties are collected.							
Options							
Content Type: Email	•						
Properties							
Name	Value	*					
* Name	Bob Barker_03Oct11 14.45.29_Terminal Services	.msg					
Title	Terminal Services	E					
То	Bob Barker						
Subject	Terminal Services						
From	Dave MacKay						
сс		-					
	ОК	Cancel					

This message indicates that after the email is filed to the drop-off library, the related routing rules will route the email to the appropriate location.

The upload dialog confirms that you have filed the email to the drop-off library:

ſ	🔘 Upload Progress 📃
	Copying files to: http://sp2010rc/> DropOffLibrary
	Bob Barker_03Oct11 14.45.29_Terminal Services.msg 🖋
	Close dialog when uploads are complete

NOTE: If you file an email to a location that is a destination point of the drop-off library, Email Manager overrides the action and re-routes the email to the drop-off library itself, rather than the destination. The reason for this is to ensure that the content is routed according to how the Content Organizer has been configured to move content to the desired libraries.

Using Managed Metadata

Managed metadata is a set of hierarchical terms that you can use to classify items in SharePoint. The terms are defined in the SharePoint site, and are available to you when you are filing emails.

To read more about managed metadata in SharePoint, please see:

http://technet.microsoft.com/en-us/library/ee424402.aspx

When you are entering metadata, you can use typeahead or select from the entire list of terms to make the process more efficient, and you can add your own terms to a set of metadata.

Using Typeahead

If you are typing in a field that has managed metadata, a drop-down list of options displays when you start typing the first few letters. You can then select from the list of options rather than typing in the rest of the term.

O Edit Properties		x
Options		
Content Type: Document	Ŧ	
Properties		
Name	Value	A
Attachment		
Message Body	A V	
To-Address	/O=FIRST ORGANIZATION/OU=EXCHANGE ADMINIS	
From-Address	/O=FIRST ORGANIZATION/OU=EXCHANGE ADMINIS	
Cc-Address		
Bcc-Address		
Tags	p Q	•
	Public Relations [Keywords] OK Cance	2

Using Person or Group Metadata

You can assign person or group metadata when filing emails.

Depending on how your SharePoint document library was configured, you may have the following options to:

- enter multiple people and/or groups
- choose people only or people and groups
- choose from all users or a group

Validating a Person or Group Name

To validate a person or group name:

1. If you only know part of the name of a person or group, you can enter one or more letters

in the field and click the validation icon 🖳

The following error message displays:

Person Single	e:	🎝 🔟
	No exact match was found. Click the item(s) that did not resolve for more	options.

2. Click the item to display a drop-down menu of suggestions based on the letter(s) you entered:

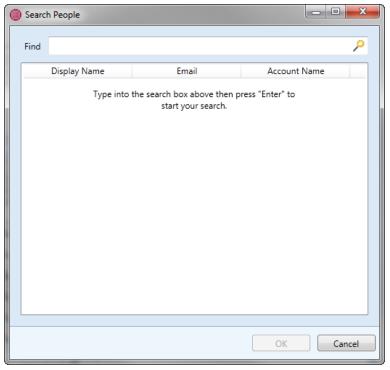
Edit Properties			x
Options			
Content Type: Document	Ŧ		
Properties		Value	*
▲ Name	Bob Barker_01Feb11 14.20.1	5_FW Get More for Less with Patch .msg	
Title	FW: Get More for Less with	Patch Plus Antivirus	
Person Single	e: Suggestions	e item(s) that did not resolve for more options.	
Person and Group Si	B <mark>e</mark> n H <mark>e</mark> nderson Bill <mark>E</mark> ngland		Ξ
Person Multi	Brad Wild <mark>e</mark>	\$ √ ₩	
Person and Group M	Bra <mark>e</mark> den Calyniuk Brent Bolleman	S./ 10	
Person Home Membe	CORPORAT <mark>E</mark> \ablock	S_/ 🗓	
* Person Required	CORPORAT <mark>E</mark> \abunk <mark>e</mark> r — CORPORAT <mark>E</mark> \aboog <mark>e</mark> nsen	&/ D	
Group Within Group	CORPORAT <mark>E</mark> \barryj CORPORAT <mark>E</mark> \barryj	8 ₁ / 19	Ŧ
	None of the above	OK	
	Remove More Names	292	5

3. Select an item from the list to enter in the field, or enter new search letters.

Searching for a Person or Group Name

To search for a person or group name:

1. Click the address book icon is to view the directory of your SharePoint people and groups. The **Search People** dialog displays:



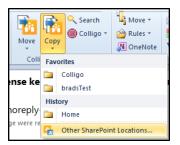
- 2. Click the search icon *logication* to display a complete list of all people and groups, or enter a name in the **Find** field and press **Enter** to search.
- 3. Select the person or group you want to add to the field and click **OK**.

Moving or Copying Email

You can use the Move and Copy buttons in the Colligo Email Manager group to move or copy emails to a SharePoint folder. If you choose to move the email, there is no longer a copy of it in your Outlook account. If you choose to copy the email, a copy is retained in your Outlook account.

To move or copy an email to a SharePoint folder:

- 1. Select the email you want to move to a SharePoint location.
- 2. In Outlook 2010, click either the **Move** or **Copy** button in the **Colligo Email Manager** group on the **Home** tab; in Outlook 2007, click the **Move to SharePoint** or **Copy to SharePoint** button in the **Colligo Email Manager** toolbar.
- 3. From the drop-down menu, choose the folder you want to move your email to:



4. If the folder you want is not in your Favorites or History list, select **Other SharePoint Loca**tions.

Select Move Destination	
🛄 Add 🛄 Remove 📴 Edit 🚖 🔤 🔎 💭	
▶ 🔁 Home	
Selected location:	
	OK Cancel

The Select Move/Copy Destination dialog displays:

5. Browse to the location of the folder or list you want to copy the email to.

You can use the filter if you are navigating a folder that has a large number of subfolders. Type one or more letters of the folder name in the filter field to narrow the results to folders with those letters:

Select Move Destination	x
🛄 Add 🛄 Remove 🖾 Edit 🚖 🚞 🔎 💭	
 Today Test Today Test Today Test Today Total Total Total Total Total Total Total Total Total Total Total Total Total Total Total Total Total Total Total Total Total T	
Selected location: Home > Arne Test > Managed Metadata > FoldersToFilter	
OK	el

6. Click **OK**.

The Edit Properties dialog displays.

7. See Using Managed Metadata for information about metadata fields.

Moving or Copying Multiple Emails

To move or copy multiple emails:

- 1. Select your emails in Outlook (use Ctrl + click to select more than one email).
- In Outlook 2010, click either the Move or Copy button in the Colligo Email Manager group on the Home tab; in Outlook 2007, click the Move to SharePoint or Copy to SharePoint button in the Colligo Email Manager toolbar.
- 3. Select the folder location that you are moving or copying the emails to.

The Edit Properties dialog displays:

Edit Properties		
FW: Get More for Less	Options	
🖼 SharePoint 2010 Webii	Content Type: Documen	it v
	Properties	
	Name	Value
	* Name	Bob Barker_01Feb11 14.20.15_FW Get More for .msg
	Title	FW: Get More for Less with Patch Plus Antivirus
< >		OK

4. In the left pane, select the email and edit the **Content Type** and **Properties** as needed.

See Using Managed Metadata for information about metadata fields.

See <u>Applying Metadata to Multiple Emails</u> for information about applying metadata to multiple items.

5. When metadata for all emails is complete, click **OK**.

The emails are moved or copied to the selected folder.

Applying Metadata to Multiple Emails

You can apply the same metadata properties to multiple emails. However, the properties that are available for group edit are the ones that are common to all selected upload items. Therefore, items that are based on the same content type will have more common properties available for group edit than a group of items that are based on different content types.

To apply the same metadata to multiple emails:

- 1. Select your emails in Outlook (use **Ctrl + click** to select more than one email).
- In Outlook 2010, click either the Move or Copy button in the Colligo Email Manager group on the Home tab; in Outlook 2007, click the Move to SharePoint or Copy to SharePoint button in the Colligo Email Manager toolbar.
- Select the folder location that you are moving or copying the emails to. The Edit Properties dialog displays.
- 4. Press the **Ctrl** key and click to select the emails in the left column that you want to apply the same metadata to.

The metadata properties that are common to all selected items display. All metadata you enter is applied to all selected emails:

Edit Properties	San San					
FW: Get More for Less	Group Edit: Enter property values to apply to the 2 selected upload items.					
·	Options	Options				
	Content Type: Document	Ŧ				
	Properties					
	Name	Value				
	Title	<click a="" all="" for="" here="" items="" selected="" set="" to="" value=""></click>				
	column					
		Value specified here will apply to all selected items.				
	customprop <pre><click a="" all="" for="" here="" items="" selected="" set="" to="" value=""></click></pre>					
	Enterprise Keywords					
		Value specified here will apply to all selected items.				
· · ·		OK				

See Using Managed Metadata for information about metadata fields.

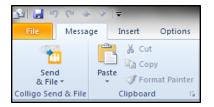
- 5. Edit the **Content Type** and **Properties** as needed.
- 6. When metadata for all emails is complete, click **OK**.

The emails are moved or copied to the selected folder.

Sending and Filing Emails

When you are sending an email you can choose the send-and-file option so the email is saved to a Share-Point site at the same time as being sent to the recipient.

1. When your email is complete and ready to send, click the **Send & File** button.



A list of your **Favorites** and **History** (most recently used SharePoint folders) displays:

& Fil	👻 🖓 Format Paint	ti
Fav	orites	
	Documents 6	
	Web Pages	
Hist	ory	
	Web Pages	
	Documents	
1	Other SharePoint Locations	_

You can choose a favorite, a recently visited location (History), or you can browse to any location in your SharePoint sites.

2. Choose a site by clicking on it in the list.

The Edit Properties dialog displays.

3. Edit the **Content Type** and any **Metadata** fields as preferred.

See Using Managed Metadata for information about metadata fields.

4. Click **OK** to submit the property information.

The email is sent to the SharePoint location.

NOTE: You can determine whether or not this action means that the email is copied or moved to the SharePoint site by changing the Colligo Email Manager settings. See <u>Managing Settings</u>.

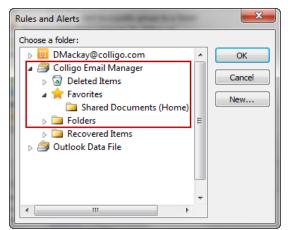
Using Outlook Rules to File Emails

To use an Outlook rule to file an email:

- 1. In Outlook, use the Rules Wizard to define the properties of the email that will be filed by the rule.
- 2. To choose the SharePoint folder you want to file the email in, click the **move it to the spec-ified folder** link in Step 2 of the Rules Wizard:

Rules Wizard
Start from a template or from a blank rule Step 1: Select a template
Stay Organized
Move messages from someone to a folder
Move messages with specific words in the subject to a folder
Move messages sent to a public group to a folder
Y Flag messages from someone for follow-up
Move RSS items from a specific RSS Feed to a folder
Stay Up to Date
Not see the second second in the New Item Alert Window
Play a sound when I get messages from someone
Send an alert to my mobile device when I get messages from someone
Start from a blank rule
Apply rule on messages I receive
Apply rule on messages I send
Step 2: Edit the rule description (dick an underlined value)
Apply this rule after the message arrives
from people or public group
move it to the specified folder
and stop processing more rules
Example: Move mail from my manager to my High Importance folder
Example: Prove mail from my manager to my high importance loider
Cancel < Back Next > Finish

The Rules and Alerts dialog displays:



- 3. Browse to your preferred SharePoint folder in the **Colligo Email Manager** group.
- 4. Click **OK**.
- 5. Edit the remaining elements of the rule description in the wizard and click **Finish**.

All emails that meet the criteria of the rule are filed to the SharePoint location you selected; however, the **Edit Properties** dialog displays so you can edit the metadata for each email.

Using Outlook Quick Steps to File Emails

To use Quick Steps to file emails:

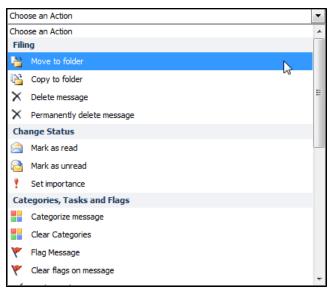
1. In the Quick Steps group on the Home ribbon, click **Create New**:



The Edit Quick Step dialog displays:

Edit Quick Step	2	×
	e: Quick Step	
Add actions be	low that will be performed when this quick step is clicked on.	
Choose an Ac	ction	×
Add Action		
Optional		
Shortcut key:	Choose a shortcut 💌	
Tooltip text:	This text will show up when the mouse hovers over the quick step.	
	Finish	ancel

- 2. In the **Name** field, enter a name for the Quick Step.
- 3. Under the **Choose an Action** drop-down menu, in the **Filing** group, choose **Move to folder** or **Copy to folder** as preferred:



After you have chosen the Filing action, the **Choose folder** menu displays on the **Edit Quick Step** dialog.

4. Choose **Other Folder** from the drop-down menu.

The **Select Folder** dialog displays:

Select Folder	×
Folders:	OK Cancel New

- 5. Choose a folder from the Colligo Email Manager group and click OK.
- 6. Click Finish.

You can file emails to the SharePoint location you chose by selecting an email in Outlook and clicking the Quick Step you created in the Quick Steps group.

The Edit Properties dialog displays so you can edit the metadata for each email.

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SEARCHING SHAREPOINT AND OUTLOOK

Colligo Email Manager provides advanced search functionality, allowing you to search within specific SharePoint sites and your Outlook account. You can use this to search for email or documents that you or others have uploaded to SharePoint, or for items in your Outlook mailbox.

NOTE: When you upload an item to SharePoint, it is available immediately within the SharePoint site. However, the item will not be returned in a search until the item has been indexed by a SharePoint crawler. The timing and frequency of the crawls are set by your administrator.

Enabling Search Capability

To enable search functionality in Outlook 2010, click the **Search** button in the **Colligo Email Manager** group on the **Home** tab; in Outlook 2007, click the **Show/Hide Search Pane** button in the **Colligo Email Manager** toolbar:



A search pane displays along the right side of your Outlook main window. You can move the search pane to any location in your Outlook window and it stays in that location the next time you start Outlook.

Colligo	•	х
Search SharePoint 🔎 🔻		

Searching

You can perform both basic and advanced searches using Colligo Email Manager's search function.

A *basic search* means you type a keyword and the search returns anything that matches that word, regardless of the occurrence of that word.

An *advanced search* means you are searching specific metadata fields, using the same syntax you would use in an Outlook search. You type the name of the metadata field you want to search, followed by a colon, followed by the term you are searching for. You can enter multiple search terms in this format.

For example, a search with the parameters *to:John subject:manual* means you are searching the metadata fields *to* and *subject* for the terms *John* and *manual*. Any results returned from the search will meet both of these search criteria. The searchable metadata fields are configured by your systems administrator. Custom metadata is also supported.

Defining Search Locations and Terms

To define your search locations and parameters:

- 1. Enter your search term in the search field.
- 2. Click the drop-down arrow to manage your search locations and options:

Search Locations Search Options

- 3. Select **Search Locations** to select the location(s) you want to search in. For more information, see Managing Search Locations.
- 4. Select **Search Options** to define your search options. For more information, see Managing Search Options.
- 5. Click the search icon to begin the search.

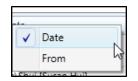
Any results display under the search field:

Colligo			▼ ×
test	ب		
Arrange By: Date			Newest on top
28/06/2011			*
Corporate\Bcheng			10:17 PM
New Microsoft Office Word Document.docx			
🖂 Corporate\Bcheng			7:57 PM
Bernard Cheng_28Jun11 08.44.01_test.msg			
🖂 Corporate\Bcheng			3:46 PM
Bernard Cheng_28Jun11 08.44.01_test.msg			
Corporate\Bcheng			3:39 PM
random_test_doc.txt			
Corporate\Bcheng			3:39 PM 🚽
Items: 202 Locations: 1 completed, 1 completed	e with warni	ng	

NOTE: If you are not getting any search results it is likely because the search capability for the SharePoint site has not been configured. Please contact your systems administrator.

Viewing Search Results

You can arrange your search results by item Date or Author (From). To toggle between these views, click on the **Arrange By** field in the results pane and select **Date** or **From**:



You can also sort the results by viewing the newest item on top or the oldest item on top. To toggle between these views, click the top-right corner of the search results to get the view you want:

test	ب م			
Arrange By: Date			Oldest on top	,
▲ 01/04/2007				-
Corporate\Barryj [Barry Jinks] B's Beverages, Inc. Project Requirements			12:00 PM	
▲ 09/03/2010				
Corporate\Ahoogensen [Arne Hoogensen] Test Document.docx			12:50 AM	
Corporate\Ahoogensen [Arne Hoogensen] Test Document2.docx			12:52 AM	
Corporate\Ahoogensen [Arne Hoogensen] Test Document3.docx			12:54 AM	
Corporate\Ahoogensen [Arne Hoogensen] Test22.docx			12:59 AM	-
Items: 202 Locations: 1 completed, 1 complete	with warn	ing		

Managing Search Results

You can open and view items that display in your search results, as well as create a new email with a link to the SharePoint item.

Viewing an Item

To view an item in your search results, either double-click it to open and view, or right-click and select **Open** from the contextual menu:



Emailing a Link to an Item

To email a link to an item in your search results, right-click the item and select **Send As Link** from the contextual menu. This opens up a new email with a link to the item's location in SharePoint.

You can also drag-and-drop the item into your Inbox for the same result.

If you have an item in your search results that is an email with an attachment, you can open the email, then drag-and-drop the attachment into your inbox; this opens up a new email with the attachment attached. The subject line of the email defaults to the name of the attached file.

Creating a Link to an Item

To copy the link to the item's location in SharePoint, right-click the item and select **Copy SharePoint Link** from the contextual menu. You can then paste the link into an email or document as needed.

Managing Search Locations

Any SharePoint site that you add to Colligo Email Manager is added to your search locations list by default. You can remove a site from the list to reduce the scope of a search, but then add it back at a later

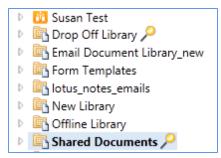
time for another search.

Adding a Search Location

You can add a site to your search locations list in one of two ways:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- In the site list, click the site you want to add to your search locations and click the Add Search Location icon: <a>?

A small magnifying glass icon appears at the end of the site name, indicating it is included in your search locations list.



OR

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Search Locations**.

The Search	Locations	dialog	displays:
-------------------	-----------	--------	-----------

Colligo Email Manager Co	onfiguration
SharePoint Sites	Search Locations
Favorites	Add ARemove
Folders	Add Search Location
Search Locations	
Search Options	
Settings	
	Close

3. Click the Add Search Location link or the Add icon.

The Add Search Location dialog displays:

Add Search Location	
0	
D 🔀 Home	
Selected location: Home	
	OK Cancel

4. Select the site you want to add to the search list and click **OK**.

The site is now included in your search locations list.

Removing a Search Location

To remove a site from your search locations list:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Search Locations**.
- 3. In the site list, click the site you want to remove and click **Remove**. The site no longer displays in the list.

Managing Search Options

The **Search Options** area of Email Manager lets you define your search parameters. To define the search options:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
- 2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Search Options**.

The Search Options dialog displays.

🔘 Colligo Email Manager Co	onfiguration	×				
SharePoint Sites	Search Options					
Favorites	Outlook					
Folders	Search Outlook Inbox					
Search Locations	Limit results to: 200					
Search Options	SharePoint Query Options					
Settings	Limit results to: 200					
	Search On					
	● Files and Folders ○ Files Only ○ Folders Only					
	All Files Files					
	Type Extension	*				
	📝 👜 Microsoft Word Document docx	E				
	Microsoft Excel Worksheet xlsx					
	Microsoft PowerPoint Prese pptx					
	📝 🖳 Microsoft Word 97 - 2003 I doc					
	Microsoft Excel 97-2003 W xls					
	Microsoft PowerPoint 97-2 ppt	*				
		Close				

- 3. In the **Outlook** section of the dialog, check the **Search Outlook Inbox** option if you want to include your inbox content in your search. In the **Limit results to** field, enter the number of results you want returned.
- 4. In the **SharePoint Query Options** section, enter the results number in the **Limit Results to** field.
- 5. In the Search On section, choose your parameters:
 - a. Choose from one of the following:
 - a. Files and Folders
 - b. Files Only
 - c. Folders Only
 - b. If you choose either the **Files and Folders** or **Files Only** option, you can further determine the file types you want to search by choosing one of the following:
 - a. All Files
 - b. Filter Files
 - c. If you choose **Filter Files** you can further define the type of files you are searching by checking the boxes of the file types in the list.

Custom Search Folders

Custom search folders are functionality native to Outlook and are separate from Colligo's search capability. A custom search only searches within Outlook, whereas an Email Manager search includes both your Outlook account as well as your SharePoint sites.

MANAGING RECOVERED ITEMS

The **Recovered Items** folder in the Colligo Email Manager list is a catch-all for any emails or items that are not successfully uploaded to a SharePoint folder.

You can drag-and-drop any item in the Recovered Items folder to your Folders and Favorites lists, or delete the items altogether. You can also move or copy the items to SharePoint using the Move and Copy buttons.

UNINSTALLING COLLIGO EMAIL MANAGER

To uninstall Colligo Email Manager:

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