Colligo Email Manager 6.1

Connected Mode – Administrator's Guide



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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: <u>http://www.colligo.com/support/</u>.

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

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 10 MB in size. When installed, it consumes less than 20 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 (AD FS 2.0) or similar identity management systems are not currently supported.

Technical Requirements

Software Requirements

Colligo Email Manager requires the following software:

- Microsoft Outlook 2007, 2010 SP1, or 2013 (32-bit or 64-bit edition)
- Internet Explorer 7, 8, or 9 (optional)
- Windows XP SP3, Windows Vista, Windows 7, or Windows 8
- Windows 2008R2 Server (for Terminal Services)

Colligo Email Manager also requires the following supporting software on the client machine:

- Microsoft .NET framework 4.0 Runtime
 - o http://www.microsoft.com/download/en/details.aspx?id=17718
- Microsoft Visual C++ 2010 Redistributable Package
 - 32-bit Operating System: <u>http://www.microsoft.com/download/en/details.aspx?id=5555</u>
 - 64-bit Operating System: <u>http://www.microsoft.com/download/en/details.aspx?id=14632</u>
- Visual Studio Tools for Office (VSTO) 2010
 - o http://www.microsoft.com/en-us/download/details.aspx?id=35594
- Microsoft Office PIAs
 - Office 2010: <u>http://www.microsoft.com/download/en/details.aspx?id=3508</u>
 - o Office 2007: <u>http://www.microsoft.com/download/en/details.aspx?id=18346</u>
- Windows Identity Foundation: <u>http://www.microsoft.com/en-ca/download/details.aspx?id=17331</u> *NOTE*: Windows Identity Foundation (WIF) is not supported in Windows XP, so it is not necessary to install it if you are using XP. For Windows Vista/ 7/8, WIF is required to handle Colligo Administrator authentication through AD FS 2.0.

Server Software Requirements

Colligo Email Manager requires at least one of the following:

- Microsoft SharePoint Server 2013
- Microsoft SharePoint Server 2010
- Microsoft SharePoint Foundation 2010
- SharePoint 2010 & 2013 Online (Office 365)
- (Optional) Microsoft FAST Search Server 2010 for SharePoint

No additional server-side software is required from Colligo. Colligo Administrator is an optional serverside component facilitating enterprise deployments of Colligo Email Manager and other Colligo client software.

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 (<u>support@colligo.com</u>) for compatibility questions regarding further Cumulative Updates and Service Packs for SharePoint.

Hardware Requirements

Colligo Email Manager has the same client system requirements as Office, which you can find here: <u>http://technet.microsoft.com/en-us/library/ee624351.aspx#Overview</u>

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> /gn

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\02007PIA.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.

Display Language

Colligo Email Manager is available in English, French, German, and Spanish (Castilian and Latin American). If users have a French/German/Spanish version of Microsoft Office installed, Email Manager displays in the same language; otherwise it displays in English.

Post-Install Configuration

Colligo Email Manager saves settings in the registry. Many settings can be configured post-install by pushing out settings to the registry. A detailed list of settings is maintained on the Colligo website at http://www.colligo.com/support/settings/email-manager/

Overriding PST Policies

Some organizations have a policy that does not allow users to create or modify PSTs. If this is the case, the following key must be added to the registry in order to override the policy and allow users to file emails and attachments to SharePoint locations through Colligo Email Manager:

Кеу	HKEY_CURRENT_USER\Software\Policies\Microsoft\Office\ <version>\Outlook\PST\</version>					
Value Name	PSTD is able Grow Allow Authenticode Overrides					
Value Data	1					
Value Type	DWORD					

For more information, please see: <u>http://support.microsoft.com/kb/956070</u>

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: <u>https://community.colligo.com/entries/23392635-How-can-I-use-Orca-MSI-editor-to-configure-a-Colligo-installer</u>

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, because **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.

File Edit Tables Transform Tools View Help							
D 🗳 🖬 🐇 🖻 🖻 🖄	* = 🖻 🛒 🏪						
Tables MsiAssemblyName MsiDigitalCertificate	Property UpgradeCode VSDFrameworkVersion	Value {7D6190A9-B50F-4798-8307-486DFC41742F} v4.0					
MsiDigitalSignature MsiEileHash	VSDAllowLaterFrameworkVersions ProductName	s False					
MsiFileHash MsiPatchHeaders ODBCAttribute	ProductName ProductCode ProductVersion	Colligo Email Manager {DE7F1847-1ADB-4A9D-B784-9E63F30EC0D1} 5.0.065					
ODBCDataSource	Manufacturer	Colligo Networks					
ODBCDriver ODBCSourceAttribute	ARPCONTACT ProductLanguage	Colligo Networks 1033					
ODBCTranslator Patch	ARPPRODUCTICON SecureCustomProperties	_853F67D554F05449430E7E.exe PREVIOUSVERSIONSINSTALLED;NEWERPRODUC					
PatchPackage ProgId	VSDNETURLMSG VSDIISMSG	This setup requires the .NET Framework version This setup requires Internet Information Server 5					
Property PublishComponent	VSDUIANDADVERTISED	This advertised application will not be installed This setup requires the .NET Framework version					
RadioButton RegLocator	VSDINVALIDURLMSG VSDVERSIONMSG	The specified path '[2]' is unavailable. The Intern Unable to install because a newer version of this					
Registry RemoveFile	MaintenanceForm_Action	Repair ErrorDialog					
RemoveIniFile	SFF_UpFldrBtn SFF_NewEldrBtn	UpFldrBtn					
Tables: 88	Property - 35 rows	No column is selected.					

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

d Row			Name -	×
Name	Value			
Property				
Value				
Column	1			
	String[72], Required			
	ОК	Cancel]	
			<i>.</i>	

- 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** 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.

Editing the Registry

Registry settings may be stored under HKEY_LOCAL_MACHINE or HKEY_CURRENT_USER. Values are stored in:

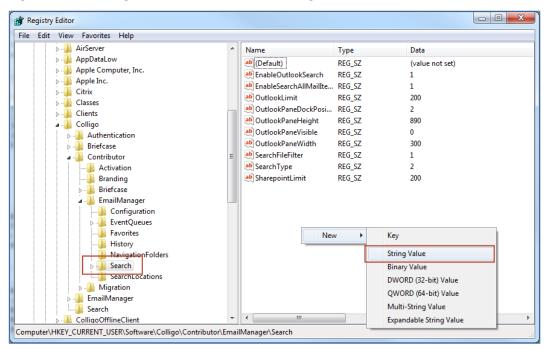
- HKEY_LOCAL_MACHINE\Software\Colligo\Contributor\
- HKEY_LOCAL_MACHINE\Software\Wow6432Node\Colligo\Contributor\
- HKEY_CURRENT_USER\Software\Colligo\Contributor\

Registry keys must be in the form of Key/String Value. To add a string value to a registry key:

- 1. Open the Registry Editor.
- Navigate to the Key you want to add a new String Value to. For example, if the key is
 EmailManager/Search/OutlookPaneVisible, Search is the key and OutlookPaneVisible is the string
 value within the Outlook Key.

NOTE: If the key doesn't exist, you can create it by right clicking on the parent key and select **New Key** from the contextual menu.

3. Right-click on the right side and select **New > String Value** from the contextual menu:



A new String Value appears in the Name list.

Enter the name of the String Value; in this example, it would be **OutlookPaneVisible**.
 To edit the name of the String Value, right click it and select **Rename** from the contextual menu:

ame		Туре	Data
) (Default)		REG_SZ	(value not set)
OutlookPaneDo	ockPosition	REG_SZ	2
OutlookPaneH	eight	REG_SZ	723
OutlookPaneW	idth	REG_SZ	274
OutlookPane ^{v:}		DEC CZ	
	Modify		
	Modify Bir	nary Data	
Delete			
	Rename		

5. Press **Enter** or right-click and select **Modify** from the contextual menu to display the **Edit String** dialog:

Edit String	×
Value name:	
OutlookPaneVisible	
Value data:	
	OK Cancel

6. Enter the Value data and click OK.

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, favorites, and Launchpad configuration. This makes 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 <u>Colligo Sales</u>.

Virtualization and Hot Desking

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

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.

This property can use merge fields, which have two parts: the literal string "Environment" and the environment variable name. For example, the merge field [EnvironmentCOMPUTERNAME] will be replaced by the value of the COMPUTERNAME. You could use 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: <u>http://msdn2.microsoft.com/en-us/library/aa979690.aspx</u>.

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: <u>http://msdn2.microsoft.com/en-us/library/ms954084.aspx</u>.

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.

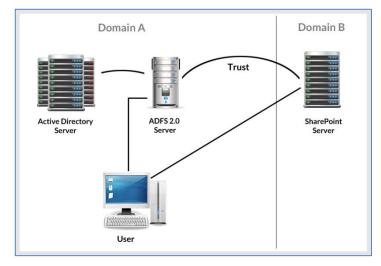
White Labeling

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.

Support for AD FS 2.0

Colligo Email Manager supports AD FS 2.0 (Active Directory Federation Service) authentication.

The infrastructure of the client machine, SharePoint Server, and AD FS 2.0 Server is illustrated below:



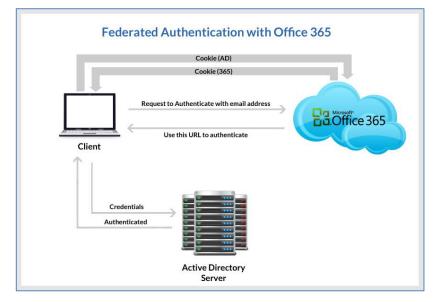
The workflow of the above infrastructure is as follows:

- 1. The user on client machine attempts to contact the SharePoint Server.
- 2. The SharePoint server denies the attempt, sending a message back to the client machine.
- 3. The client machine then attempts to connect to the AD FS 2.0 Server, which verifies the user's identity, and sends a token back to the client machine.
- 4. The token is then sent to the SharePoint Server, which has an inherent trust connection established with the AD FS 2.0 Server (configured during set up).
- 5. The connection to the SharePoint Server is successful.

Federation with Office 365 Sites

Colligo Email Manager supports federated authentication to Office 365 through AD FS 2.0.

The following diagram illustrates how Colligo Email Manager federates with Office 365 sites:



The workflow of the above infrastructure is as follows:

- 1. User sends request to Office 365 site using an email address.
- 2. Depending on the email address used to log in, it either manages the login on Office 365 (Managed Credentials) or re-direct back to the user with a URL (federated).
- 3. Colligo Email Manager authenticates the redirected URL, which points to an Active Directory server.
- 4. Active Directory returns a token to the user.
- 5. The user re-submits the token as the authentication to the Office365 site.
- 6. The token is accepted by Office 365 and the user receives a secondary token for future communication with Office 365.

Enabling Authentication Service Endpoint

To configure AD FS 2.0, you need to enable an authentication service endpoint:

https://<server>/adfs/services/trust/2005/usernamemixed

S 2.0	Endpoints				Actions
Service	Enabled	Proxy Enabled	URL Path	Туре	Endpoints
Certificates	Token Is	suance			View
Claim Descriptions	Yes	n/a	/adfs/ls/	SAML 2.0/V	New Window from Here
Trust Relationships	No	No	/adfs/services/trust/2005/windows	WS-Trust 20	Q Refresh
Relving Party Trusts	No	No	/adfs/services/trust/2005/windowsmixed	WS-Trust 2(
Attribute Stores	Yes	Yes	/adfs/services/trust/2005/windowstransport	WS-Trust 2(🤁 Help
_	No	No	/adfs/services/trust/2005/certificate	WS-Trust 2(/adfs/services/trust/20
	Yes	Yes	/adfs/services/trust/2005/certificatemixed	WS-Trust 2(
	Yes	Yes	/adfs/services/trust/2005/certificatetransport	WS-Trust 2(Disable on Proxy
	No	No	/adfs/services/trust/2005/usemame	WS-Trust 2	Disable
	No	No	/adfs/services/trust/2005/usemamebasictransport	WS-Trust 2(P Help
	Yes	Yes	/adfs/services/trust/2005/usemamemixed	WS-Trust 2	🛛 Help
	Yes	No	/adfs/services/trust/2005/kerberosmixed	WS-Trust 2(
	No	No	/adfs/services/trust/2005/issuedtokenasymmetricbasic256	WS-Trust 2(
	No	No	/adfs/services/trust/2005/issuedtokenasymmetricbasic25	WS-Trust 2(
	Yes	Yes	/adfs/services/trust/2005/issuedtokenmixedasymmetricba	WS-Trust 2(
	No	No	/adfs/services/trust/2005/issuedtokenmixedasymmetricba	WS-Trust 2(
	Yes	Yes	/adfs/services/trust/2005/issuedtokenmixedsymmetricbasi	WS-Trust 2(
	No	No	/adfs/services/trust/2005/issuedtokenmixedsymmetricbasi	WS-Trust 2	
	No	No	/adfs/services/trust/2005/issuedtokensymmetricbasic256	WS-Trust 2	
	No	No	/adfs/services/trust/2005/issuedtokensymmetricbasic256s	WS-Trust 2	
	No	No	/adfs/services/trust/2005/issuedtokensymmetrictripledes	WS-Trust 2	
	No	No	/adfs/services/trust/2005/issuedtokensymmetrictripledess	WS-Trust 2(🗸	

https://<server>/adfs/services/trust/13/windowstransport (for default credentials)

AD FS 2.0	Endpoints				Actions
Service	Enabled	Proxy Enabled	URL Path	Type	Endpoints
Endpoints Certificates	No	No	/adfs/services/trust/13/issuedtokenasymmetricbasic25bsh	WS-Trust T.	View
Claim Descriptions	Yes	Yes	/adfs/services/trust/13/issuedtokenmixedasymmetricbasic	WS-Trust 1.	
Trust Relationships	No	No	/adfs/services/trust/13/issuedtokenmixedasymmetricbasic	WS-Trust 1.	New Window from Here
Claims Provider Trusts	Yes	Yes	/adfs/services/trust/13/issuedtokenmixedsymmetricbasic2	WS-Trust 1.	Q Refresh
📔 Relying Party Trusts	No	No	/adfs/services/trust/13/issuedtokenmixedsymmetricbasic2	WS-Trust 1.	
Attribute Stores	No	No	/adfs/services/trust/13/issuedtokensymmetricbasic256	WS-Trust 1.	Relp
	No	No	/adfs/services/trust/13/issuedtokensymmetricbasic256sha	WS-Trust 1.	/adfs/services/trust/13/
	No	No	/adfs/services/trust/13/issuedtokensymmetrictripledes	WS-Trust 1.	
	No	No	/adfs/services/trust/13/issuedtokensymmetrictripledessha	WS-Trust 1.	Enable on Proxy
	No	No	/adfs/services/trust/13/issuedtokenmixedsymmetrictripledes	WS-Trust 1.	Disable
	No	No	/adfs/services/trust/13/issuedtokenmixedsymmetrictripled	WS-Trust 1.	Help
	No	No	/adfs/services/trust/13/windows	WS-Trust 1.	
	No	No	/adfs/services/trust/13/windowsmixed	WS-Trust 1.	
	Yes	No	/adfs/services/trust/13/windowstransport	WS-Trust 1.	1
	Yes	No	/adfs/services/trusttcp/windows	WS-Trust 21	1
	Yes	No	/adfs/services/trust/artifactresolution	SAML-Artifa	
	Metadat	э			
	Yes	Yes	/adfs/services/trust/mex	WS-MEX	
	Yes	Yes	/FederationMetadata/2007-06/FederationMetadata.xml	Federation 1	1
	Yes	No	/adfs/fs/federationserverservice.asmx	ADFS 1.0 M	
				-	
	•			•	1

Кеу	KEY_CURRENT_USER\Software\ Colligo \Contributor\Authentication\Adfs				
Value Name	AD FS2.0 display name – for display purposes only>				
Value Data	<ad 2.0="" <u="" e.g.="" fs="" name:="" server="">https://adfs.mycompany.com > < AD FS 2.0 realm for SharePoint server e.g. urn:sharepointsvradfs:sharepoint></ad>				
Value Type	String				

After your AD FS 2.0 server is configured, you need to deploy the following registry key to your users:

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 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.

BCS Support

Colligo Email Manager supports BCS (Business Connectivity Services). When setting up a BCS connection, you must also have an external list set up. Email Manager uses the external list to define which columns to display in the dialog.

Email Manager does not support External Field columns when the BCS implementation includes filters. If this is the case, you may want to turn the BCS feature off completely. To do this, see the following configuration setting:

http://www.colligo.com/support/setting/enable-metadata-type-external-field/

Hiding Metadata Fields

When configuring your document libraries in SharePoint, you can choose to hide certain columns so data can be extracted into them but not be seen by the user.

If you want to have a more flexible way to hide specific metadata fields in the **Edit Properties** dialog in Email Manager post-install, you can use the following registry key and values:

Кеу	HKEY_LOCAL_MACHINE\Software\Colligo\Contributor\EmailManager\HiddenMetadataFiel ds
Value Nam e	Global
Value Data	Column name Column name
Value Type	String

NOTE: this feature hides the metadata fields in Email Manager only; they are still visible in SharePoint.

In the **Value Data** field, enter the name of the SharePoint column(s) you want to hide from users in the metadata prompt. You can use either the display name or the internal name. If you want to enter multiple column names, use the pipe character (|) to separate the fields.

NOTE: there can be no spaces between the pipe character (|) and the field name.

Configuring SharePoint Libraries for Email Metadata

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: <u>https://community.colligo.com/entries/23216964-How-do-I-set-default-column-names-for-email-metadata-mapping-</u>

Download the attachment *CfsEmailLibrary2010.zip*.

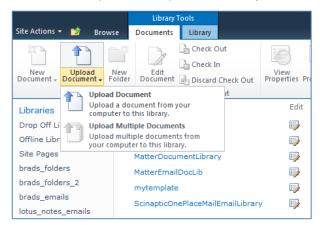
The zip file contains a site template named CfsEmailLibrary2010.stp.

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:

Site Actions 👻 📦				
Home + Site S	Settings			
Libraries Drop Off Library Offline Library		Users and Permissions People and groups Site permissions		
Site Pages brads_folders brads_folders_2 brads_emails lotus_notes_emails DaryITest		Galleries Site columns Site content types Web parts List templates Master pages Themes Solutions		

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:

List Template Gallery - Cfs	EmailLibrary2010.stp	□ ×
Edit		
Save Cancel Paste	Delete Rem	
Commit Clipboard	Actions	
Name *	CfsEmailLibrary2010 .stp	
Title	CfsEmailLibrary2010	
Description		*
		-
Created at 8/5/2011 10:50 AM Last modified at 8/5/2011 10:50 AM	Save Cancel	

- 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.
- Select Site Actions > More Options. The Create dialog displays.

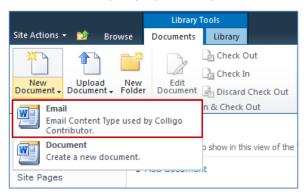
Create							□ ×
Browse From:						Search Installed Items	٩
Installed Items >	Title 🔺 Type						
Office.com					-	CfsEmailLibrary2010	
Filter By:						Type: Library Categories: Content	
All Types >		6.2		282			
Library	• •	99		2 6			
List	Announcements	Asset Library	Assets Web Database	Basic Meeting		Name	
Page			Database	Workspace		Create More Options	
Site						Create More Options	
All Categories >		220					
Blank & Custom	P						
Collaboration	Basic Search Center	Blank Meeting	Blank Site	Blog			
Communication		Workspace					
Content							
Data	10000000						
Meetings							
Search	Calendar	CfsEmailLibrary201	Charitable	Config			
Tracking	Calendar	CtsEmailLibrary201 0	Contributions Web	Config			
Web Databases							
	Contacts	Contacts Web Database	Correspondence	Custom List			
					•		

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.

Email Metadata	Default Column Name (display name of SharePoint column)	Туре
Attachment	Attachment	Yes/No
Всс	Всс	Text
Bcc-Address	Bcc-Address	Text
Всс-Туре	Всс-Туре	Text
Categories	Categories	Text
Categories	Email Categories	
Cc	Cc	Text
Cc-Address	Cc-Address	Text
Сс-Туре	Сс-Туре	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
Subject	Email Subject	
То	То	Text
To-Address	To-Address	Text
То-Туре	То-Туре	Text

Colligo Email Manager extracts the following metadata properties from emails:

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

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**.

NOTE: if you are creating a library for your email metadata to be extracted into, and you want your users to be able to search on field-specific metadata, you must then also configure each column to be searchable. For information on configuring columns for search, see **Adding Columns to SharePoint**.

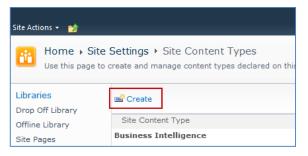
Adding a New Content Type to a Library

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 👻 😏		Te	ssa MacKin	non -	
Use this page to d	Settings → Site Content Types → New Site Con create a new site content type. Settings on this content type updates to the parent may overwrite settings on this type.	/1	🥑 I Like It	Tags & Notes	*
Libraries Drop Off Library	Name and Description Type a name and description for this content type. The description will be shown on the new button.	Name: Email			
Offline Library Site Pages Email Document Library_new New Library Lists Calendar Case	description will be shown on the new button.	Description: Parent Content Type: Select parent content type from: Document Content Types Parent Content Type: Document Description: Create a new document.	*		ш
	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: Custom Content Types New group:			
		ОК	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 Type

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

Site Actions 👻 📩							
Home ▶ Site	Settings → Site Content T	ypes 🕨 Email			I Like It	Tags & Notes	•
Libraries Drop Off Library	Site Content Type Information						
Offline Library	Name: Email_new Description:	Name: Email_new Description:					
Site Pages	Parent: Document						
Email Document Library_new	Group: Custom Content Type	S					
New Library	Settings						
Lists Calendar Case Discussions Team Discussion	Name, description, and group Advanced settings Workflow settings Delete this site content type Information management policy se Manage publishing for this content Document Information Panel settin	type					Е
	Columns						
	Name	Туре	Status	Source			
	Name	File	Required	Document			
	Title	Single line of text	Optional	Item			
	Add from existing site columns Add from new site column Column order						Ŧ

Add Columns to Content Type:

Site Actions 👻 🐋		-	
	e Settings • Site Content Types • Email • Add Columns to Con o add site columns to this site content type.	tent Type	I Like It Tags & Notes
Libraries Drop Off Library Offline Library Sike Pages Email Document Library_new New Library Lists Calendar Case	Select Columns Select from the lat of available site columns to add them to this content type.	Select columns from: All Groups Available columns: Column to ad Active Acti	*
	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	
		ОК	Cancel

- 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 🗸
Use this page to Home Arne Test C Jinks Kaczor Dyck LLC	Guillaume Test OnePlaceMail Test Steve Test Colligo Social Committee Ben Hende	I Like It Tags & Notes Braeden's Demo Site Susan Test ? erson Special Column Test Bernard Test
BeeDub Test test_ne	w_site TessaTest	
Libraries Drop Off Library Offline Library Site Pages brads_folders brads_folders_ brads_folders_2 brads_emails lotus_notes_emails DaryITest DaryITest DaryITest Susan a new library Test Email Document Library_new New Library Lists Calendar	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 Hyperlink with formatting and constraints for publishing Summary Links data
Calendar Case Discussions Team Discussion	Group Specify a site column group. Categorizing columns into groups will make it easier for users to find them.	 Rich media data for publishing Managed Metadata Put this site column into: Existing group: Custom Columns
All Site Content	Additional Column Settings	New group: Description:
	Specify detailed options for the type of information you selected.	Require that this column contains information: Yes No Maximum number of characters: 255 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? $\textcircled{\sc 0}$ Yes $\textcircled{\sc 0}$ 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.

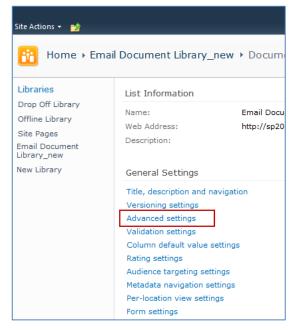
Hiding Columns

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:

Site Actions 👻 🐋		
Home + Er	nail Document Library > Document Library Settings > Advanced	d Settings
Libraries Drop Off Library Offline Library Site Pages	Content Types Specify whether to allow the management of content types on this document library. Each content type will appear on the new button and can have a unique set of columns, workflows and other behaviors.	Allow management of content types?

- 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:

		e content types to specify the information you want to display The following content types are currently available in this libra
Content Type	Visible on New Button	Default Content Type
Document	v	

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

Site Actions 👻 😏							
	il Document Library_new > add new content types to this list.	Document Library Setting	s → Add Content Type	S	ی I Like It	Tags & Notes	•
Libraries Drop Off Library Offline Library Site Pages Email Document Library_new New Library Lists Calendar Case	Select Content Types Select from the list of available site content types to add them to this list.	Select site content types from: All Groups Available Site Content Types: Allow any content type " Augue any content type " Basic Page Basic Page Document Set Document Set Document Set Document Set Document Email new From Image Link to a Document Link to a Document Description: None Group: Custom Content Types	Add > Add > < Remove	Content types to ac	id:		E
				ОК	Cancel		j

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

Content Types				
This document library is configured to allow multiple content types. Use content types to specify the information you want to display about an item, in addition to its policies, workflows, or other behavior. The following content types are currently available in this library:				
Content Type	Visible on New Button	Default Content Type		
Email	~	~		
Document	~			
Add from existing site conten Change new button order and				

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**:

Columns		
A column stores information about ea	ch document in the document library	y. The following columns are currently available in this document library:
Column (click to edit)	Туре	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 👻 🐋		
	il Document Library_new > Document Library Settings > Create Colu add a column to this document library.	mn 🥥 👽 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	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) 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)
Recycle Bin	Additional Column Settings	© External Data © Managed Metadata
	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 Xadd to default view
	Column Validation	
		OK Cancel

3. Enter the following information:

- a. Name and Type
 - i. Column name: enter the column name

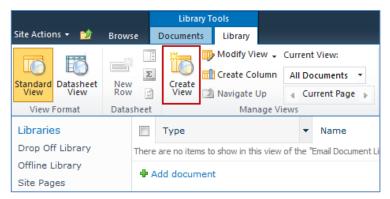
- ii. Choose a type of information contained in the column
- b. Additional Column Settings
 - i. Description: enter a description for the column
 - ii. **Require that this column contains information**: choose **Yes** if you require this column to be a mandatory field the user must fill out
 - iii. Enforce 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.

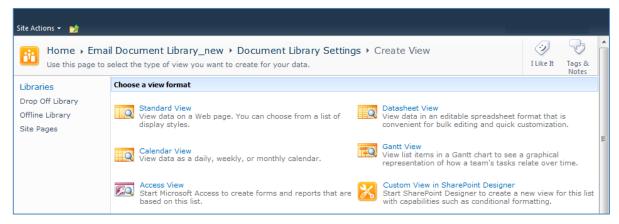
Creating an Email View

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 👻 🐋			
	il Document Library_new > Document Library Se create a view of this document library.		Like It Tags & Notes
Libraries		ОК	Cancel
Drop Off Library Offline Library Site Pages Email Document Library_new New Library	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)	
New Library	Audience		
Lists Calendar Case	Augurence 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 Posit Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) Image: Column Name (included to document) <td>ion from Left 1 2 3 4 4</td>	ion from Left 1 2 3 4 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 ascending order (A, B, C, or 1, 2, 3) Show items in descending order (C, B, A, or 3, 2, 1) Show items in descending order (C, B, A, or 3, 2, 1) Show items in descending order (C, B, A, or 3, 2, 1) Show items in descending order (C, B, A, or 3, 2, 1)	ar before items).
	G 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 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 O And O Or When column None is equal to is equal to 	×
	Talina Editina	Show M	lore Columns
	 Inline Editing ■ Tabular View 		
	Group By		
	Totals		
	∃ Style		
	Folders		
	Item Limit		
	☐ Hobile 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: 3 Field to display in mobile list simple view: Name (linked to document with edit menu) ▼ 	view:
		ОК	Cancel
			out now

- 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:

Site Actions 👻 📷	Brows	e í	Library To Documents	ols Library	
Standard Datasheet		Σ	ĩo 🖁		
View View	New Row		Create View 🖄	Default	
View Format	Datas	heet		/lan All Documents	ack
Libraries			Туре	Public	Mo
Drop Off Library		There a	are no items to	_{shc} Email	prary_
Offline Library		Add document		Other	
Site Pages		TAC	ia aocument	Configure Views for This Location	

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 <u>Colligo Email Manager User Guide</u>), and check that the correct metadata is being displayed and extracted in the **Edit Properties** dialog:

Options Content Type: Email	•	
Properties		
Name	Value	
± Name	Email Manager config file	.msg
Title	Email Manager config file	
То	David MacKay	
From	Bob Barker	
Conversation	Emailconfig file	
Subject	Emailconfig file	
Sent	05/08/2011	15
		OK Cancel

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:

```
k?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="Categories" SPColumn="Categories"/>
<Mapping Field="Cc" SPColumn="Cc-Address"/>
<Mapping Field="Cc" SPColumn="Cc-Address"/>
<Mapping Field="Cc" SPColumn="Cc-Address"/>
<Mapping Field="Cc-Type" SPColumn="Cc-Type"/>
<Mapping Field="From SPColumn="From"/>
<Mapping Field="From-Address" SPColumn="From-Address"/>
<Mapping Field="From-SPColumn="From-Type"/>
<Mapping Field="Importance" SPColumn="From-Type"/>
<Mapping Field="Received" SPColumn="Message Body"/>
<Mapping Field="Received" SPColumn="Received-UTC"/>
<Mapping Field="Received-UTC" SPColumn="Sensitivity"/>
<Mapping Field="Sensitivity" SPColumn="Sensitivity"/>
<Mapping Field="Sent-UTC" SPColumn="Sensitivity"/>
<Mapping Field="Sensitivity" SPColumn="Sensitivity"/>
<Mapping Field="Sensitivity" SPColumn="Sensitivity"/>
<Mapping Field="Sent-UTC" SPColumn="Sensitivity"/>
<Mapping Field="Sensitivity" SPColumn="Sensitivity"/>
<Mapping Field="Sent-UTC" SPColumn="Sensitivity"/>
<Mapping Field="Sensitivity" SPColumn="Sensitivity"/>
<Mapping Field="Sensitivity" SPColumn="Sensitivity"/>
<Mapping Field="Sent-UTC" SPColumn="Sensitivity"/>
<Mapping Field="To-Address" SPColumn="To-Address"/>
<Mapping Field="To-Address" SPColumn="To-Address"/>
<Mapping Field="To-Address" SPColumn="To-Address"/>
<Mapping Field="To-Type" SPColumn="To-Type"/>
</Mapping Field="To-Type" SPColumn="To-Address"/>
</Mapping Field="To-Type" SPColumn="To-Type"/>
</Mappi
```

Configuring Search

Colligo Email Manager is compatible with SharePoint Foundation 2010, SharePoint Enterprise 2010, and SharePoint Enterprise 2010 with FAST Search Server 2010, SharePoint Foundation 2013, and SharePoint Server 2013.

Depending on which version of SharePoint you are using, Colligo Email Manager provides the ability to search on SharePoint properties. For example, users may want to search on email properties such as "To", "From" and "Subject." To enable this functionality, SharePoint must be configured to crawl the columns that you would like to allow users to search on.

A keyword search means that your results could include results from the text of a document or properties.

The following table details which versions of SharePoint support which aspects of search:

SharePoint Version	Keyword Search	Properties Search
SharePoint Foundation 2010	×	
SharePoint Server 2010	¥	¥
SharePoint Server 2010 and FAST 2010	¥	8
SharePoint Foundation 2013	¥	
SharePoint Server 2013	¥	
SharePoint Server 2010 & SharePoint 2013 Search	Ý	

NOTE: If you are using SharePoint Foundation, you cannot search on specific SharePoint metadata such as To or From. However, you may get results that include instances of your search term as a property value in a column. To use property based search, use the syntax "property:value", for example "subject:colligo".

To install FAST, follow the instructions at the following location: <u>http://technet.microsoft.com/en-us/library/ff381243.aspx</u>

The following procedures comprise Colligo's best practice approach for setting up search for your SharePoint sites:

- 1. Add any SharePoint columns you want to be searched: see Adding Columns to SharePoint.
- 2. Add your content sources and crawl them: see Adding a Content Source.
- 3. Add managed property mappings: see Adding Managed Property Mappings.
- 4. Enable the isDocument property: see **Enabling the IsDocument Property**.

Adding Columns to SharePoint

You likely have already set up various columns for your document libraries in SharePoint. Ensure that you have all the properties that you want to be searchable added as a column.

To add columns to SharePoint:

- 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.

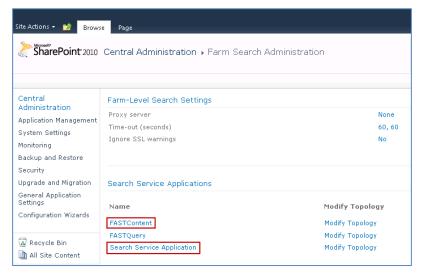
4. Upload at least one document to the library with each metadata column filled out in order for the search crawler to register any new columns.

Adding a Content Source

A content source is a SharePoint site containing the document libraries that you want to search. You can add multiple content sources if you have sites on different Farms.

To add a content source:

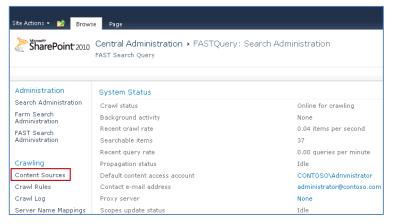
- 1. In SharePoint's **Central Administration**, go to **General Application Settings > Farm Search Administration**.
- 2. Depending on whether or not you are using FAST Search, choose one of the following options:
 - a. If you are using FAST Search, click **FASTContent**.
 - The **FASTQuery: Search Administration** page displays.
 - b. If you are not using FAST Search, click Search Service Application.
 The Search Service Application: Search Administration page displays.



If you are using FAST Search, the FASTQuery: Search Administration page displays.

If you are not using FAST Search, the **Search Service Application: Search Administration** page displays.

3. In the Crawling section, click Content Sources.



If you are using FAST Search, the **FASTContent: Manage Content Sources** page displays.

If you are not using FAST Search, the **Search Service Application: Manage Content Sources** page displays.

4. If a content source is not configured, click **New Content Source** to configure one.

Use th	iis page to add, eo	lit, or delete content s	ources, and to manage cr	awls.		
		_				
🛋 New Content Source 🛛 📓 Refresh			Start all crawls	rawls		
Туре	Name	Status	Current crawl duration	Last crawl duration	Last crawl completed	Next Full Cra
-	FAST	Idle		00:01:50	3/16/2011 4:57	None
	Contoso				PM	
33	BradsTest	Crawling	2850:12:22			7/30/2011
		Incremental				12:00 AM
	Type	Wew Content Sou Type Name FAST Contoso	Wew Content Source Refresh Type Name Status FAST Idle Contoso	New Content Source Refresh Start all crawls Type Name Status Current crawl duration FAST Contoso Contos Contoso Contos Contoso Contos C	Type Name Status Current crawl duration Last crawl duration Image: FAST Contoso Idle 00:01:50 Image: BradsTest Crawling 2850:12:22	Image: New Content Source Image: Refresh Image: Start all crawls Image: Start all crawls

If you are using FAST Search, the **FASTContent: Add Content Source** page displays.

If you are not using FAST Search, the Search Service Application: Add Content Source page displays.

Site Actions 👻 🐋		
SharePoint 2010	Central Administration + FASTContent: Add Content Source	: I like It Tags & Notes
		0
Administration Search Administration Farm Search Administration Crawling Content Sources Crawl Rules Crawl Rules Crawl Log Server Name Mappings Host Distribution Rules File Types Index Reset Crawler Impact Rules	Use this page to add a content source. * Indicates a required field Name Type a name to describe this content source. Content Source Type Select what type of content will be crawled. Note: This cannot be changed after this content source is created because other settings depend on it.	Name: * Select the type of content to be crawled: Select the type of content to be crawled: SharePoint Sites SharePoint Sites ShareS Sh
Reports Administration Reports	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): *
	Crawl Settings Specify the behavior for crawling this type of content. Selecting to crawl everything under the hostname will also crawl all the SharePoint Sites in the server. 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.	Select crawling behavior for all start addresses in this content source: © Crawl everything under the hostname for each start address © 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 None Create schedule Incremental Crawl 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 Normal •
	Start Full Crawl Select "Start full crawl of this content source" and click "OK" to start a full crawl of this content source.	C Start full crawl of this content source
		OK Cancel

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

Administration	Use th	is page to add, eo	dit, or delete content s	ources, and to manage cr	awls.		
Search Administration					1		
Farm Search Administration	🚔 New Content Source 🛛 📓 Refresh			Start all crawls			
	Туре	Name	Status	Current crawl duration	Last crawl duration	Last crawl completed	Next Full Craw
Crawling	11	FAST	Idle		00:01:50	3/16/2011 4:57	None
Content Sources		Contoso	1010		00.01.00	PM	None
Crawl Rules	***	BradsTest	Crawling	2850:12:22			7/30/2011
Crawl Log			Incremental				12:00 AM
Server Name Mappings							
Host Distribution Rules							

- 6. Wait until all crawls are completed.
- 7. Return to **Central Administration** and navigate to **General Application Settings > Farm Search Administration** to add managed property mappings.

Adding Managed Property Mappings

A managed property mapping provides the link between the SharePoint column and the search term. For example, if you want to search on the email property To, this is where you determine which SharePoint columns are searched when you enter that search term. You could have multiple SharePoint sites that each contain some form of a "To" column but they might be named slightly differently. This mapping allows you to map the "To" search term to any or all of those columns.

To add a new managed property mapping:

- 1. In SharePoint's **Central Administration**, go to **General Application Settings > Farm Search Administration**.
- 2. If you are using FAST Search:
 - a. Click FastQuery.
 - The FASTQuery: Search Administration page displays.
 - b. In the **Queries and Results** section, click **Metadata Properties.** The **FASTQuery: Metadata Property Mappings** page displays.
- 3. If you are not using FAST Search:
 - a. Click Search Service Application.
 - The Search Service Application: Search Administration page displays.
 - In the Queries and Results section, click Metadata Properties.
 The Search Service Application: Metadata Property Mappings page displays.
- 4. Click New Managed Property.

SharePoint 2010	Central Administration > Search Service Application: Metadata Property					erty	Ì	J.
	Mappings						I Like It	Tags & Notes
								(
	out the second second							
Administration	Crawled properties are automatica							
	managed properties and map craw							
Search Administration Farm Search			ged properties. Ch	anges to proper				
Search Administration	managed properties and map craw	led properties to mana	ged properties. Ch	anges to proper				
Administration Search Administration Farm Search Administration Crawling	managed properties and map craw	led properties to mana	ged properties. Ch	anges to proper	ties will take	effect after the r		

The New Managed Property screen displays:

Site Actions 👻 🐋			
SharePoint 2010	Central Administration + Search Service Applicatio	n: New Managed Property	e It Tags & Notes
			•
Administration	Use this page to view and change the settings of this property.		
Search Administration	Name and type		
Farm Search Administration	Type a name for this property, and select the type of information you want to store in this property.	Property name: *]
		Description:	
Crawling	Select the "Has Multiple Values" checkbox to enable storing multiple values for a given item with this property.		÷
Content Sources	for a given real man and property.	The type of information in this property:	
Crawl Rules		Text	
Crawl Log		Integer	
Server Name Mappings		© Decimal	
Host Distribution Rules		🔘 Date and Time	
File Types Index Reset		O Yes/No	
Crawler Impact Rules		Has Multiple Values	
Crawler Impact Rules	Mappings to crawled properties		
Oueries and Results	A list of crawled properties mapped to this managed property is shown. To	Include values from all crawled properties mapped Include values from a single crawled property based on the order specified	
Authoritative Pages	use a crawled property in the search system, map it to a managed	Crawled properties mapped to this managed property:	F
Federated Locations	property. A managed property can get a value from a crawled property based on the order specified using the Move Up and Move Down buttons or	Move Up	— I
Metadata Properties	from all the crawled properties mapped.	Move Down	_
Scopes		Add Mapping	-
Search Result Removal		Remove Mapping	
Search Result Removal			
Reports			
Administration Reports	Use in scopes	Allow this property to be used in scopes	
Web Analytics Reports	Indicates whether this property will be available for use in defining search scopes.		
in our response			
	Optimize managed property storage		
	To reduce storage requirements, new text properties are automatically	Reduce storage requirements for text properties by using a hash for comparison.	
	treated as a hash which limits comparisons (including sorting) to equality/inequality. Unselect this option to enable other types of	Add managed property to custom results set retrieved on each query. Note: Only the first 2 kilobyte	s of data is
	comparisons (less than, greater than, order by).	available for display by default.	
	To optimize queries that use a custom results page to show special managed properties, select the "Add managed property to results set" option to add		
	this property to the restricted set of managed property to results set option to add		
		OK Cancel	

5. Fill out the following fields:

- a. **Property name**: ensure the name is unique, has no spaces and is all lower case with no spaces or special characters
- b. **Type**: choose the appropriate type
- c. **Mappings to crawled properties**: click **Add Mapping** The **Crawled property selection** screen displays:

Crawled property selection	×
Crawled property selection	
Select crawled properties to map to New Property(Text)	
Select a category:	
All categories	
Crawled property name:	
Find	
Select a crawled property	
_AdHocReviewCycleID(Integer) _Author(Text) _AuthorEmail(Text) _AuthorEmailDisplayName(Text) _Category(Text) _Comments(Text) _dlc_DocId(Text) _dlc_DocIdTemGuid(Text) _dlc_DocIdTemSistId(Text) _dlc_DocIdUr(Text) _dlc_ExpireDate(Text) _dlc_ExpireDate(Text) _dlc_Holds_Property(Text) _dlc_LestRun(Text) _dlc_LastRun(Text) _dlc_LastRun(Text) _dlc_policyId(Text) _dlc_policyId(Text) _dlc_policyId(Text) _dlc_policyId(Text) _LiveCopyIndex(Integer) _NewReviewCycle(Text)	
OK Cancel]

- i. Use the **Select a category** drop-down to filter the available properties, or enter a property in the **Crawled property name** field and click **Find**.
- ii. Select a crawled property from the list and click OK to add it to the mapping.
- iii. In the Available crawled properties list and click Add to move it to the Selected crawled properties list in the New Managed Property page.
- iv. Repeat for each column you want to make available on a search query.
- 6. Click **OK**.

Enabling the Attachment Property in Search

If an email has an attachment, you can configure a managed property mapping for the attachment icon to display in the search results. Because this is not a property you can actually search on, the mapping is slightly different for this field.

Below is the Property name and the mapping you need to add to your crawled properties for the Attachment column:

Site Actions 👻 📩							
SharePoint 2010	Central Administration →	Search Service Application	: Edit Managed Property - atta	chment	i Like It	Tags & Notes	
						•	
Administration	Use this page to view and change the	settings of this property.					
Search Administration	Name and type						
Farm Search Administration	Type a name for this property, and select the type of information you	Property name: *					
	want to store in this property.	attachment					
Crawling		Description:				~	
Content Sources	Select the "Has Multiple Values"					-	
Crawl Rules	checkbox to enable storing multiple values for a given item with this	The type of information in this	property: Yes/No				
	property.	Has Multiple Values					
Crawl Log		i nas muluple values					
Server Name Mappings	Mappings to crawled properties	Include values from all	crawled properties mapped				
Host Distribution Rules	A list of crawled properties mapped to		ingle crawled property based on the orde	er specified			
File Types	this managed property is shown. To	Crawled properties mapped to	5 1 1 1	ar openned			
Index Reset	use a crawled property in the search system, map it to a managed	ows_Attachment(Yes/No)		Move Up		1	
Crawler Impact Rules	property. A managed property can get a value from a crawled property		-			_	
	based on the order specified using		-	Move Down			
Queries and Results	the Move Up and Move Down buttons or from all the crawled properties		-	Add Mappin	-		
Authoritative Pages	mapped.			Remove Map	ping		
Federated Locations		1					
Metadata Properties	Use in scopes	Allow this property to be u	ised in scones				
Scopes	Indicates whether this property will						
Search Result Removal	be available for use in defining search						
	scopes.						
Reports							
Administration Reports	Optimize managed property storage						
Web Analytics Reports	To reduce storage requirements, new	🗖 Reduce storage requireme	ents for text properties by using a hash f	or comparison.			
web Analytics Reports	text properties are automatically treated as a hash which limits	Add managed property to	custom results set retrieved on each qu	ery. Note: Only the firs	at 2 kilobyte	s of	
	comparisons (including sorting) to	data is available for displa	y by default.				
	equality/inequality. Unselect this option to enable other types of						
	comparisons (less than, greater than,						
	order by).						
	To optimize queries that use a custom						
	results page to show special managed properties, select the "Add managed						
	property to results set" option to add this property to the restricted set of						
	managed properties.						
		Delete	ОК	Can	cel		
							•

NOTE: this property is not retroactive; ie. If the column and property mapping are added after emails with attachments have been uploaded to the document library, the attachment icon will not display in the search results. The column and property mapping must be present at the time of upload to be applied.

Enabling the IsDocument Property

The IsDocument property is a SharePoint property that must be set to **True** for all document types that you want to include in a search. If this property is not set to True, no results will be returned in your search.

- 1. In SharePoint's **Central Administration**, go to **General Application Settings > Farm Search Administration**.
- 2. If you are using FAST Search:
 - a. Click FastQuery.
 - The FASTQuery: Search Administration page displays.
 - b. In the **Queries and Results** section, click **Metadata Properties.** The **FASTQuery: Metadata Property Mappings** page displays.
- 3. If you are not using FAST Search:
 - a. Click Search Service Application.
 The Search Service Application: Search Administration page displays.
 - b. In the Queries and Results section, click Metadata Properties.
 The Search Service Application: Metadata Property Mappings page displays.
- 4. Set the Managed Property **IsDocument** to True.
- 5. Click **OK**.

Configuring Local Machines

 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

```
k?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="Categories" SPColumn="Categories"/>
<Mapping Field="Cc" SPColumn="Cc-Address"/>
<Mapping Field="Cc" SPColumn="Cc-Address"/>
<Mapping Field="Cc" SPColumn="Cc-Address"/>
<Mapping Field="Cc-Address" SPColumn="Cc-Address"/>
<Mapping Field="Cc-Address" SPColumn="Cc-Address"/>
<Mapping Field="Cc-Address" SPColumn="Cc-Address"/>
<Mapping Field="Cc-Type" SPColumn="Cc-Address"/>
<Mapping Field="Cc-Type" SPColumn="Cc-Type"/>
<Mapping Field="From SPColumn="From"/>
<Mapping Field="From-Address" SPColumn="From-Address"/>
<Mapping Field="From-Address" SPColumn="From-Address"/>
<Mapping Field="From-Address" SPColumn="From-Type"/>
<Mapping Field="Erom-Type" SPColumn="From-Type"/>
<Mapping Field="Received" SPColumn="From-Type"/>
<Mapping Field="Received" SPColumn="Received"/>
<Mapping Field="Received" SPColumn="Received"/>
<Mapping Field="Sentivity" SPColumn="Sentivity"/>
<Mapping Field="Sent" SPColumn="Sent"/>
<Mapping Field="Sent" SPColumn="Sent"/>
<Mapping Field="Sent" SPColumn="Sent"/>
<Mapping Field="Sent" SPColumn="Sentivity"/>
<Mapping Field="Sent" SPColumn="Sent"/>
```

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.