Colligo Email Manager 6.2

Connected Mode – Administrator's Guide

Colligo

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Introduction

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

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

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

Target Audience

- IT Administrators
- Technical Evaluators
- Deployment Managers

Overview

Colligo Email Manager is an easy-to-deploy .NET client-only application; no server modifications are required. The installer package ranges from 40 – 60 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 authentication types are supported:

- Forms based
- Classic mode (SharePoint 2007/2010)
- Claims based (SharePoint 2010/2013)
- Office 365
- ADFS 2.0, 3.0

SharePoint by default does not provide web service permissions to anonymous users, so this permission level cannot be used for uploading documents to SharePoint.

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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
  - http://www.microsoft.com/download/en/details.aspx?id=17718
- Microsoft Visual C++ 2010 Redistributable Package
  - 32-bit Operating System: http://www.microsoft.com/download/en/details.aspx?id=5555
  - 64-bit Operating System: http://www.microsoft.com/download/en/details.aspx?id=14632
- Visual Studio Tools for Office (VSTO) 2010
  - http://www.microsoft.com/en-us/download/details.aspx?id=35594
- Microsoft Office PIAs
  - Office 2010: http://www.microsoft.com/download/en/details.aspx?id=3508
  - Office 2007: http://www.microsoft.com/download/en/details.aspx?id=18346
- Windows Identity Foundation: http://www.microsoft.com/en-ca/download/details.aspx?id=17331
  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 server-side 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 (support@colligo.com) 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: http://technet.microsoft.com/en-us/library/ee624351.aspx#Overview

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Installing Colligo Email Manager

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

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

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

EXE Installer

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

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

Interactive EXE Install

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

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

MSI Installer

The MSI installer package has the following key features:

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

Interactive MSI Install

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

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

Silent Install or Uninstall

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

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

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

For example:

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

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

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

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

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An example batch file is listed below:

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

Disabling Colligo Contributor Add-In for Outlook

If you have Colligo Contributor Add-in for Outlook installed, it is recommended that you remove it before running Colligo Email Manager.

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.

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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:

Key	HKEY_CURRENT_USER\Software\Policies\Microsoft\Office\<version>\Outlook\PST\
Value Name	PSTDisableGrowAllowAuthenticodeOverrides
Value Data	1
Value Type	DWORD

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

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

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.

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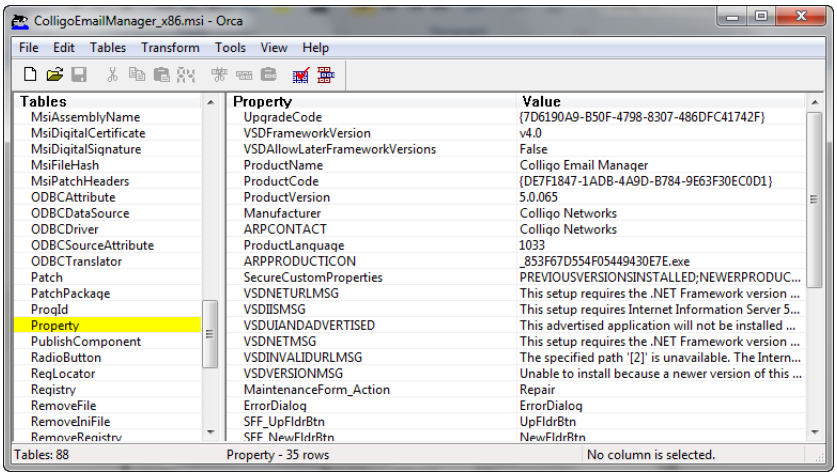
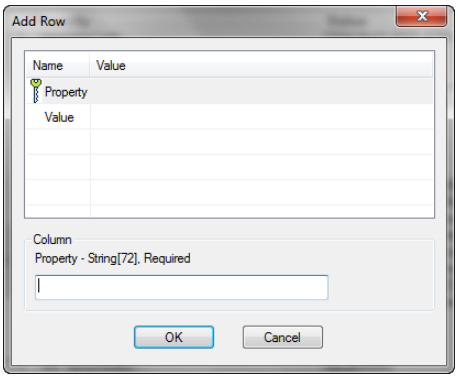


3. From the **Tables** menu, select **Add Row**.
   The **Add Row** dialog displays:



4. Enter the **Property** name and **Value**.
5. Click **OK**.
   The new property displays in the Property Table.

   NOTE: Ensure you are using the exact same property names as specified in the **Post-Install Configuration** 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.
2. 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.

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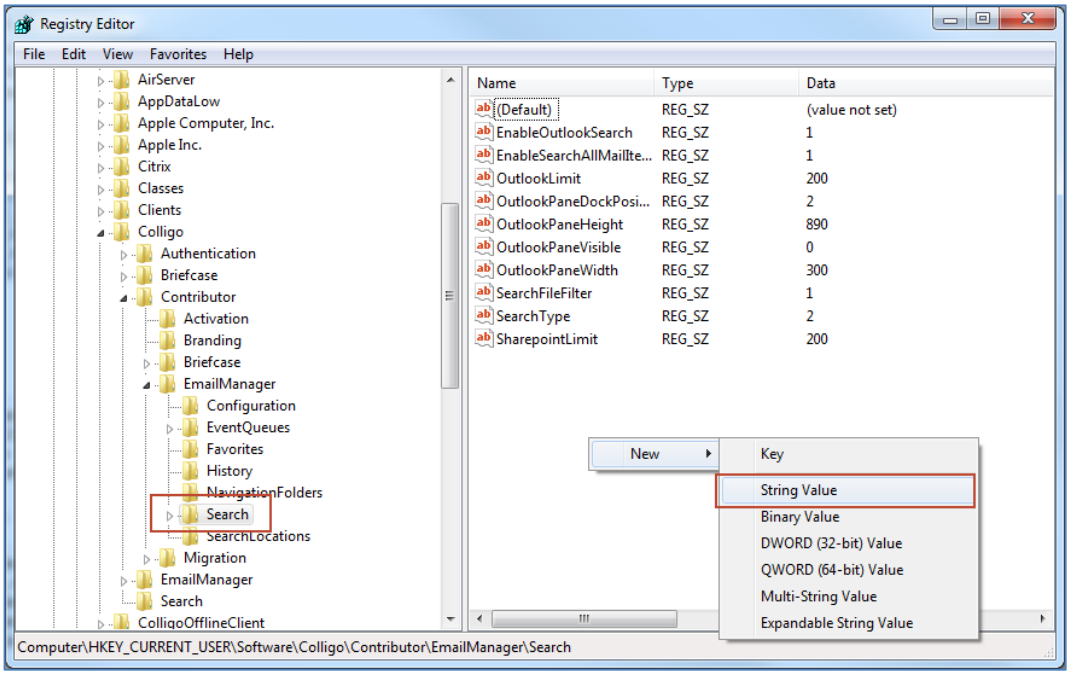
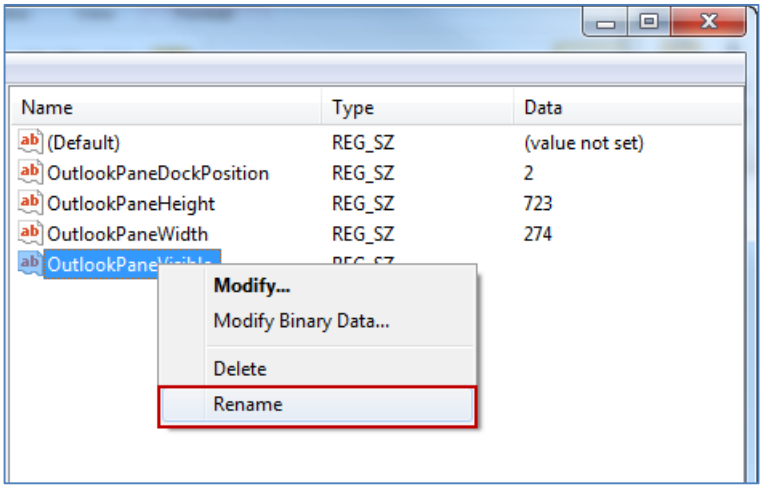
NOTE: If the key doesn't exist, you can create it by right clicking on the parent key and select **New Key** from the contextual menu.

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.

4. 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:



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

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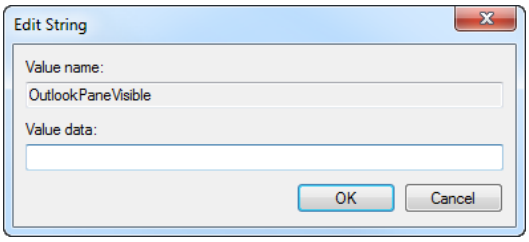

6. Enter the **Value data** and click **OK**.

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 Colligo Sales.

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.

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For example, a computer named ColligoComputer with a user named ColligoUser with the STORAGE_ROOT: *z:\PSTs\[EnvironmentCOMPUTERNAME]\[EnvironmentUSERNAME]*, the resulting path would be *z:\PSTs\ColligoComputer\ColligoUser*

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

Communications

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

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

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

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

White Labeling

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

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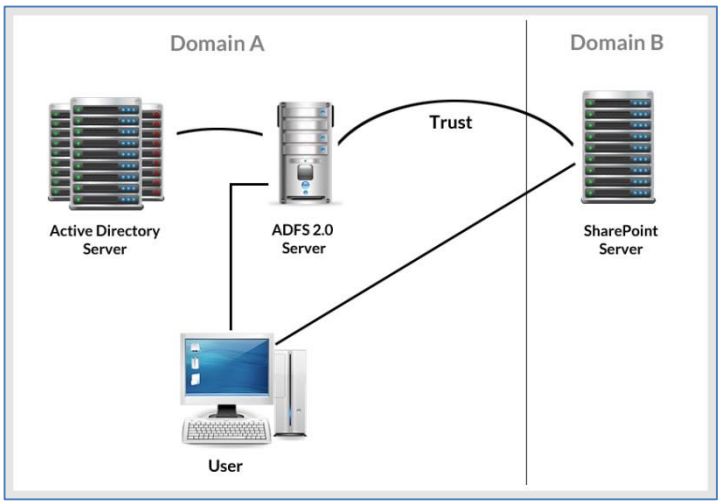
Support for AD FS

Colligo Email Manager supports AD FS 2.0 and 3.0 (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.

NOTE: Configuration settings for AD FS 2.0 or 3.0 can be found on our website: http://www.colligo.com/support/setting/adfs/

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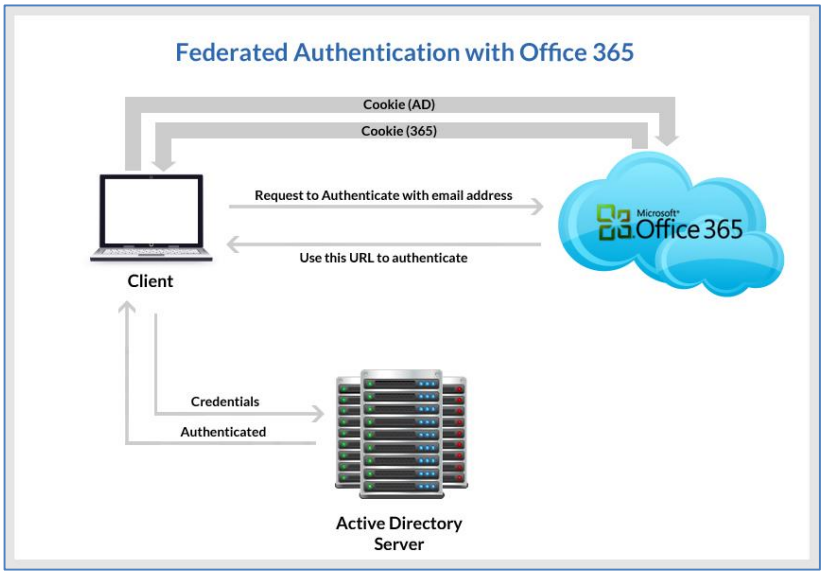
Federation with Office 365 Sites

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 Office365.

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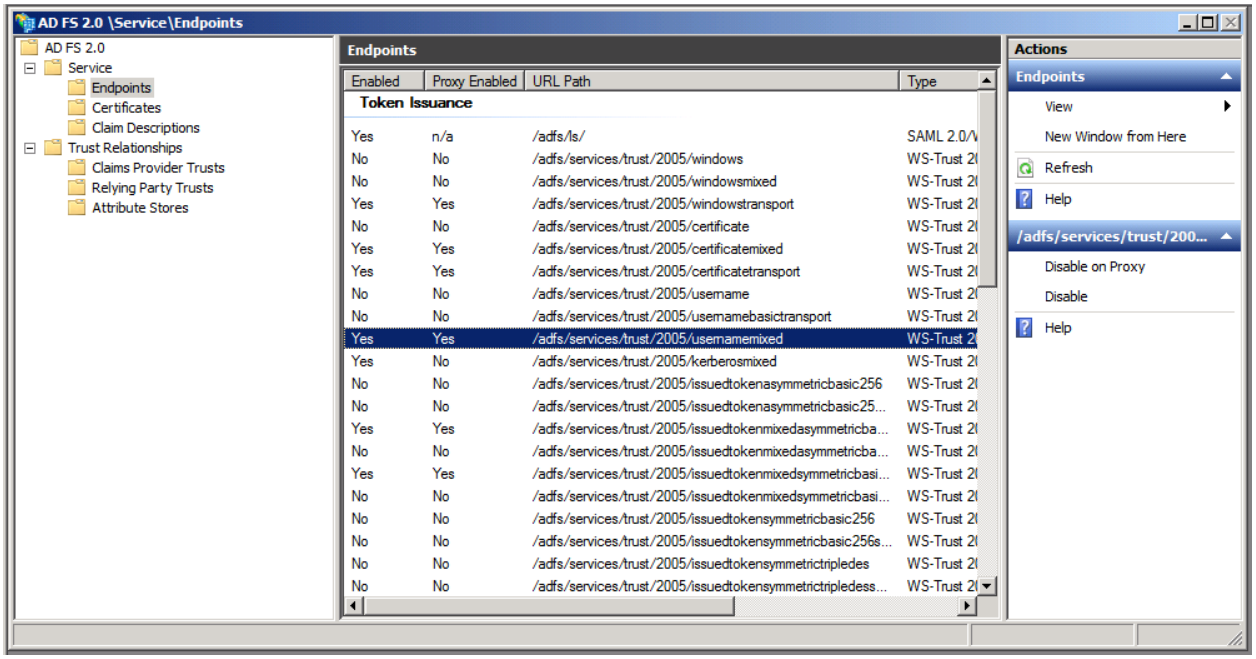
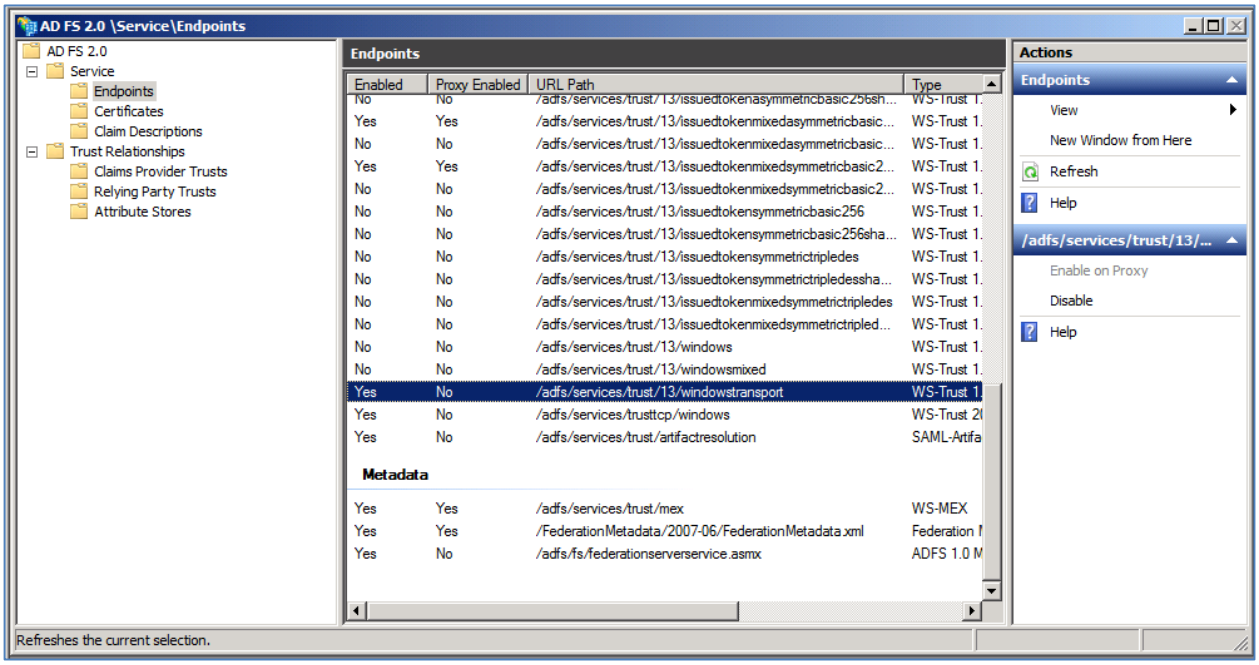
Enabling Authentication Service Endpoint

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

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



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



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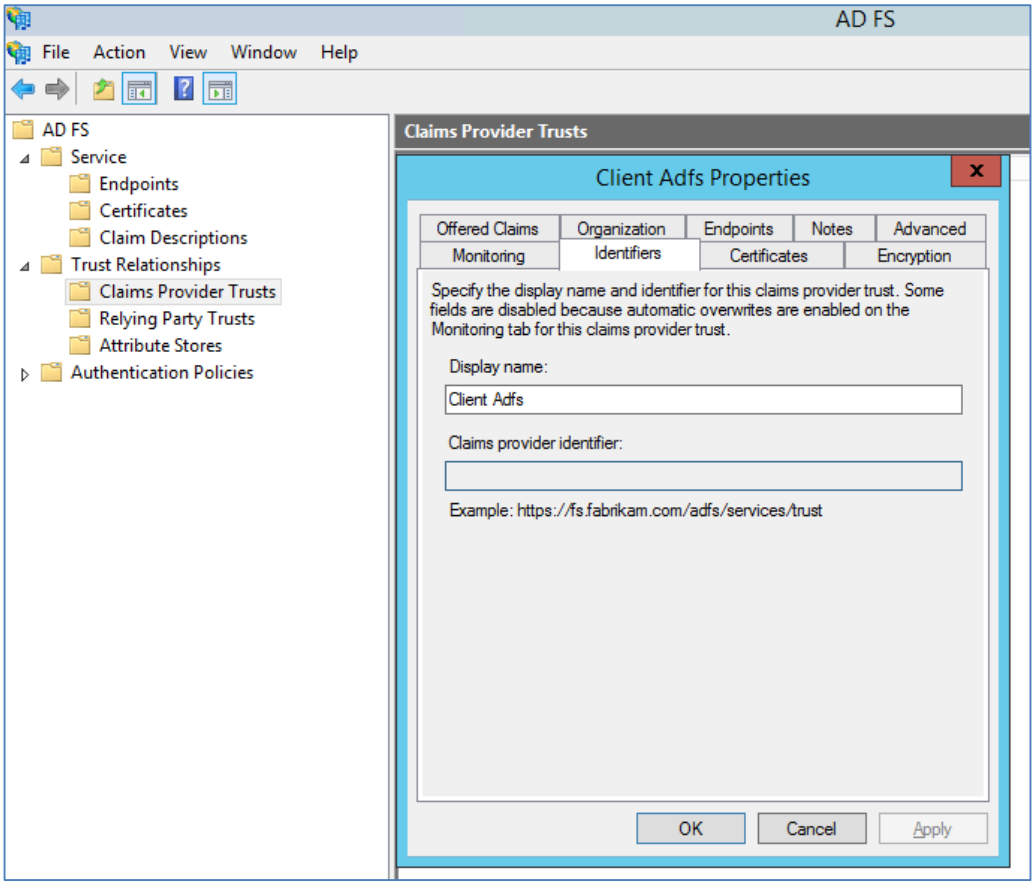
After your AD FS 2.0 server is configured, you need to deploy the following registry key to your users:

Key	HKEY_CURRENT_USER\Software\ Colligo \Contributor\Authentication\Adfs
Value Name	*<AD FS2.0 display name – for display purposes only>*
Value Data	<AD FS 2.0 Server name: e.g. https://adfs.mycompany.com > < AD FS 2.0 realm for SharePoint server e.g. urn:sharepointsvradfs:sharepoint>
Value Type	String

Server Requirements for AD FS 3.0

The following image is found on the ADFS Server located on the same domain as your SharePoint site.



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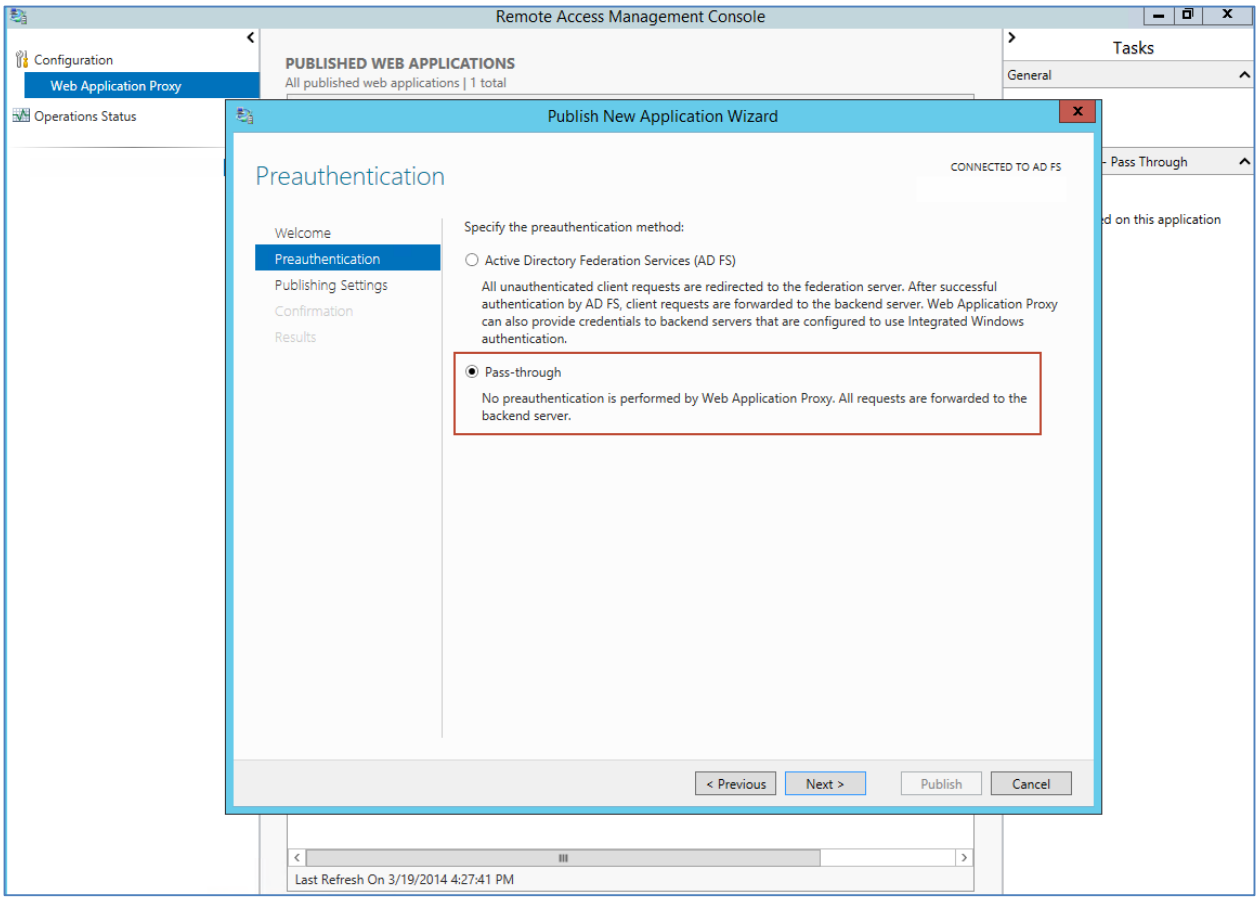
When publishing your web application, for the **Preauthentication** method, choose **Pass-through** rather than AD FS:



After your AD FS 3.0 server is configured, you need to deploy the following registry key to your users:

Key	HKEY_CURRENT_USER\Software\ Colligo \Contributor\Authentication\Adfs
Value Name	*<AD FS 3.0 display name – for display purposes only>*
Value Data	"<Claims Provider Identifier> > <ADFS Server> <SharePoint Realm>" See above e.g. urn:sharepointsvradfs:sharepoint>
Value Type	String

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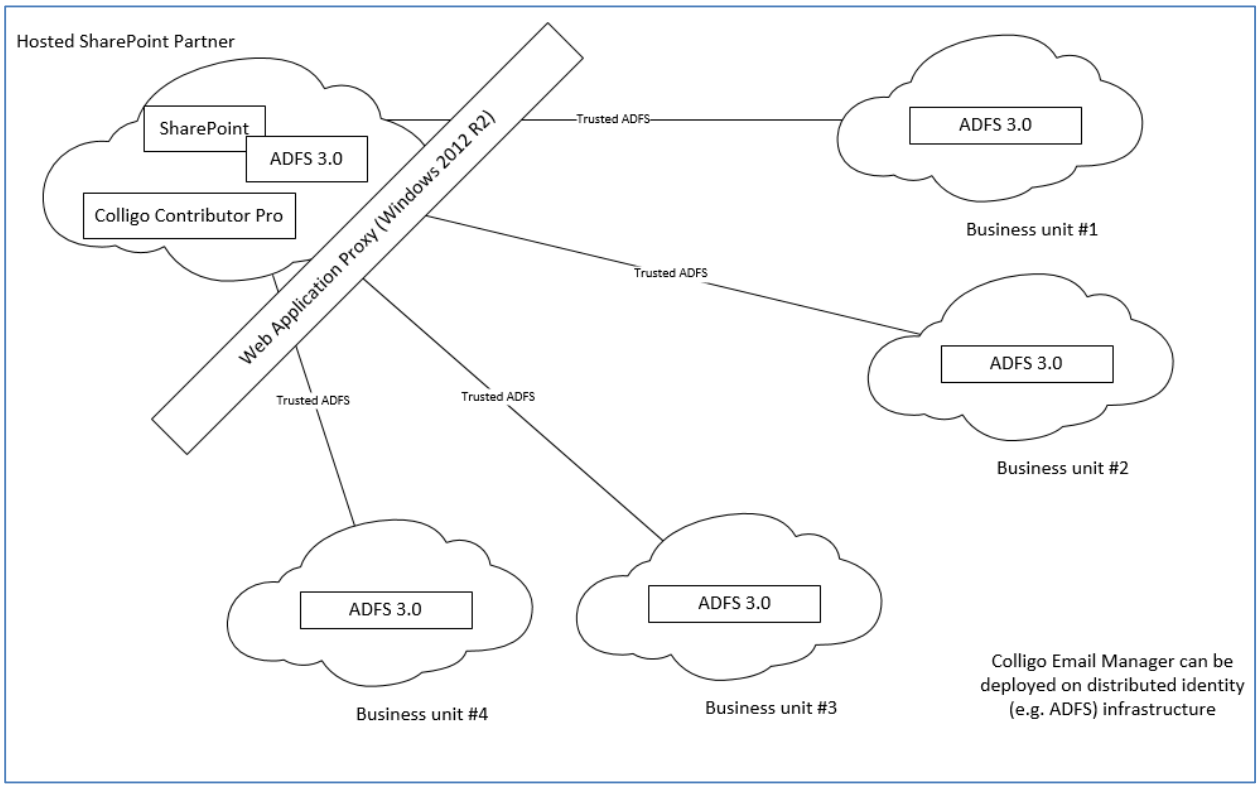
Distributed Identity Management

Colligo products support ADFS 3.0 distributed identity management infrastructure where SharePoint authentication is provided through a trust relationship between two ADFS providers.



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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:

Key	HKEY_LOCAL_MACHINE\Software\Colligo\Contributor\EmailManager\HiddenMetadataFields
Value Name	Global
Value Data	Column name|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.

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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

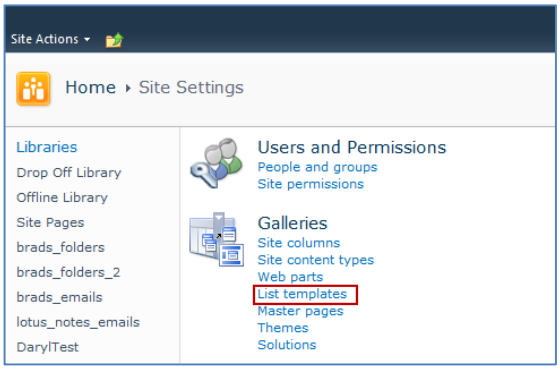
You can download the list template from the following location:
https://community.colligo.com/entries/23216964-How-do-I-set-default-column-names-for-email-metadata-mapping-

Download the attachment *CfsEmailLibrary2010.zip*.

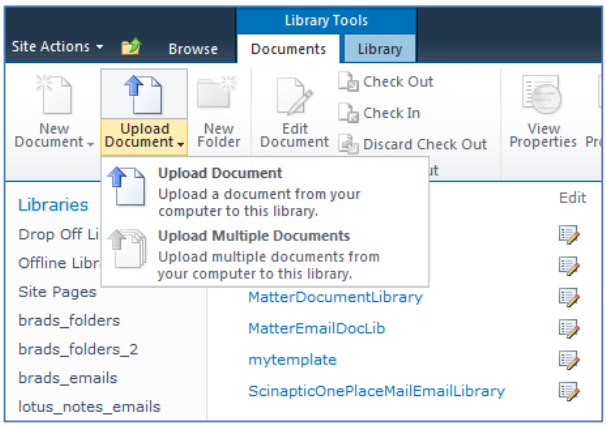
The zip file contains a site template named *CfsEmailLibrary2010.stp*.

Installing the Sample List Template

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



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



The **Upload Document** dialog displays.

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

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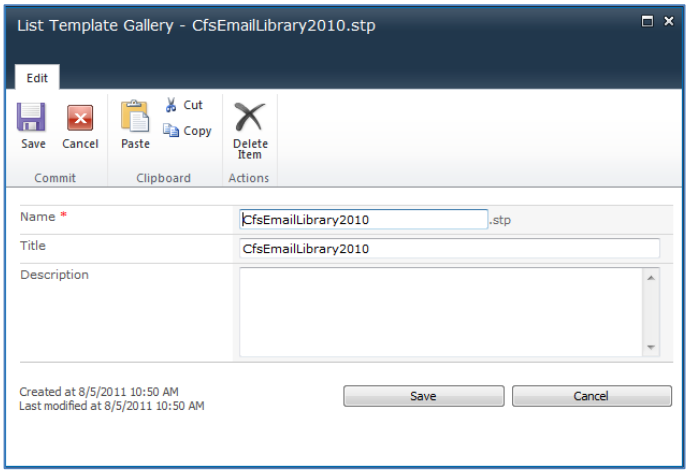
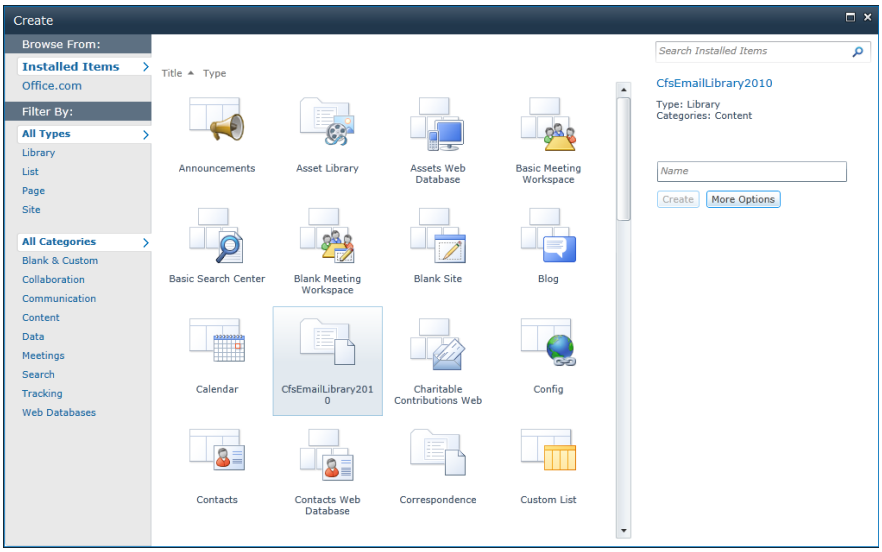


7. Enter the following information:
    a. **Name**: enter a name for the template gallery
    b. **Title**: enter a title that reflects the use of the template gallery
    c. **Description**: enter a description for the template gallery
8. Click **Save**.
   The new list template displays in the **List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

Creating a Site

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

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



3. Select the name of the list template you added.

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

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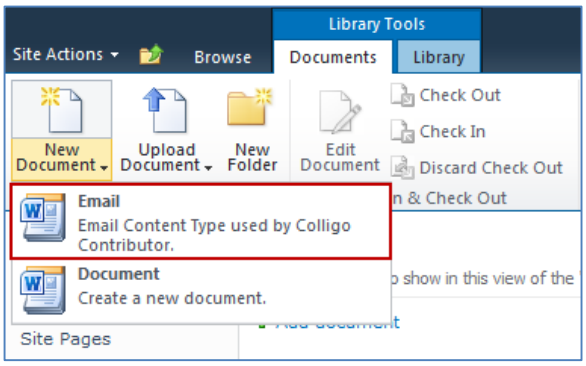
5. Under the **Library Tools** > **Documents** ribbon, click the **New Document** drop-down arrow. The new Document Library displays as an option:



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Manually Creating Content Types

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

Enabling Metadata Extraction

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

Colligo Email Manager extracts the following metadata properties from emails:

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

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

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**.

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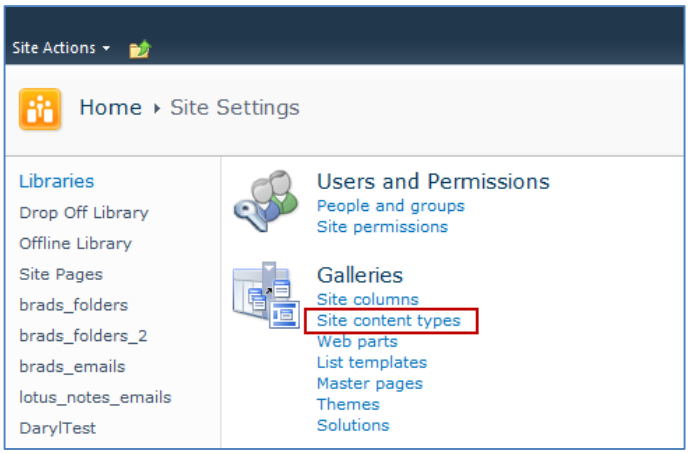
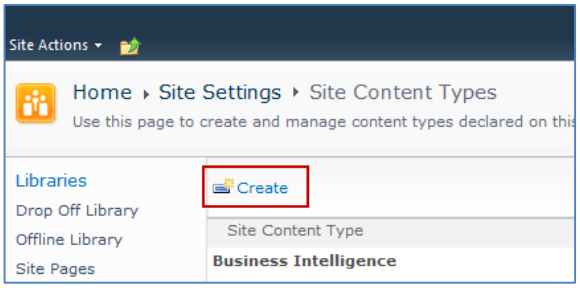
Adding a New Content Type to a Library

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:

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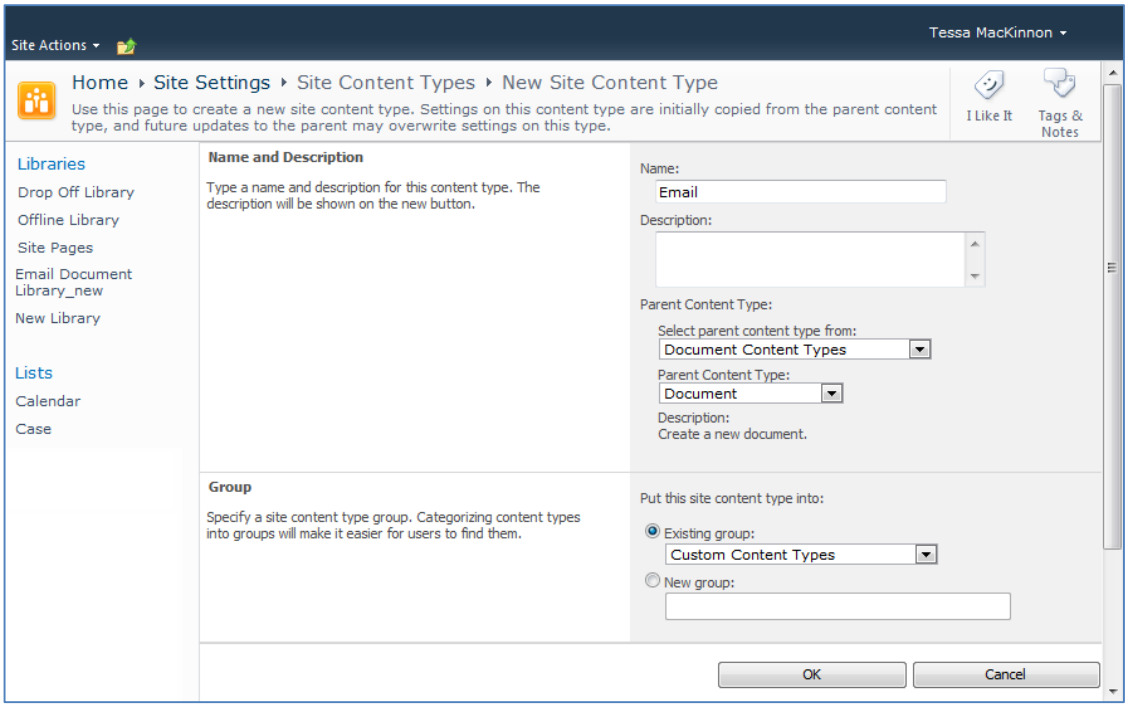

4. Enter the following information:
    a. **Name and Description**
        i. **Name**: enter a name for the content type
        ii. **Description**: enter a description for the content type
        iii. **Parent Content Type**: from the first drop-down list, select the parent content type group; in 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.

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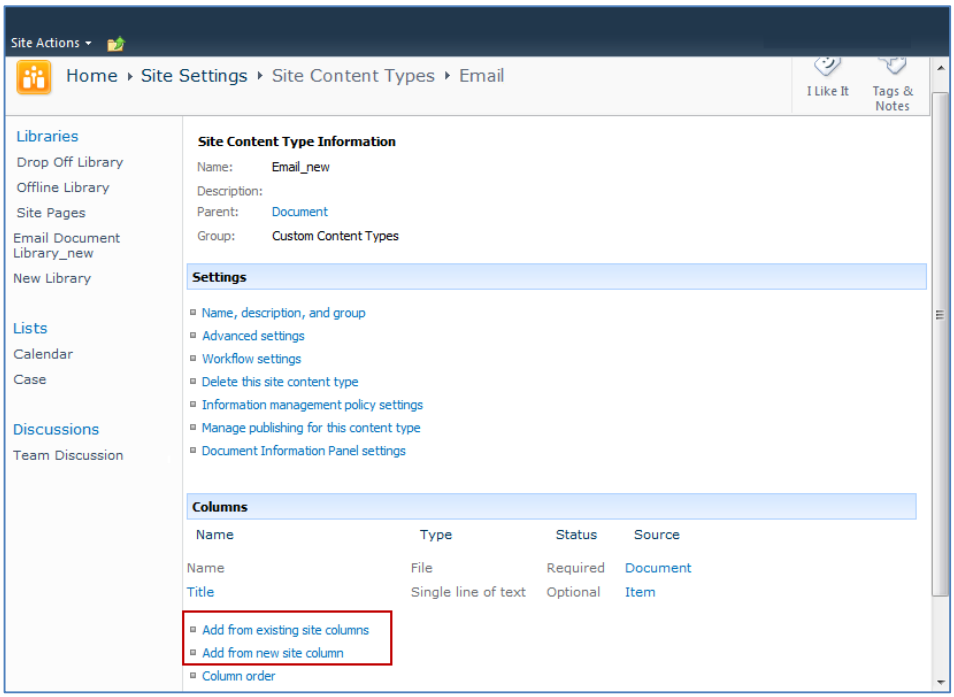
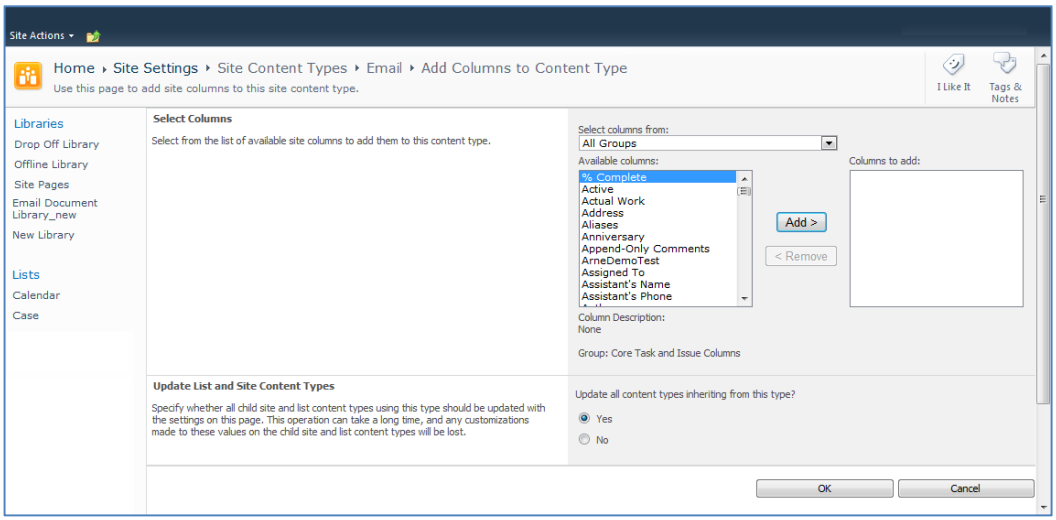
Configuring a Content Type

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**



Add Columns to Content Type:



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

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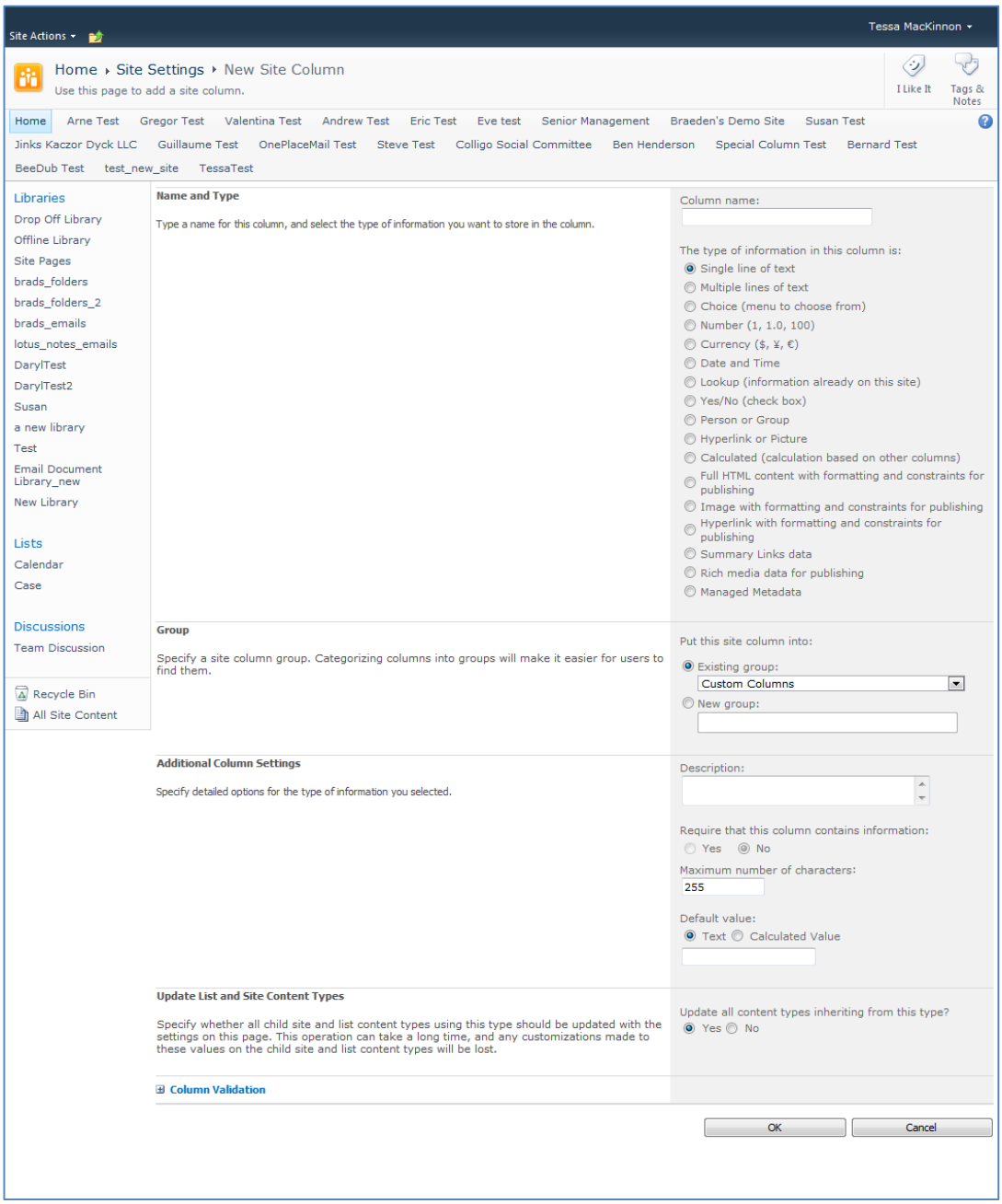
New Site Column:



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

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iii. **Maximum number of characters**: enter the maximum number of characters you want to have in this column
iv. **Default Value**: choose **Text** or **Calculated Value**

d. **Update List and Site Content Types**: choose if you want to update all content types inheriting from this type

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

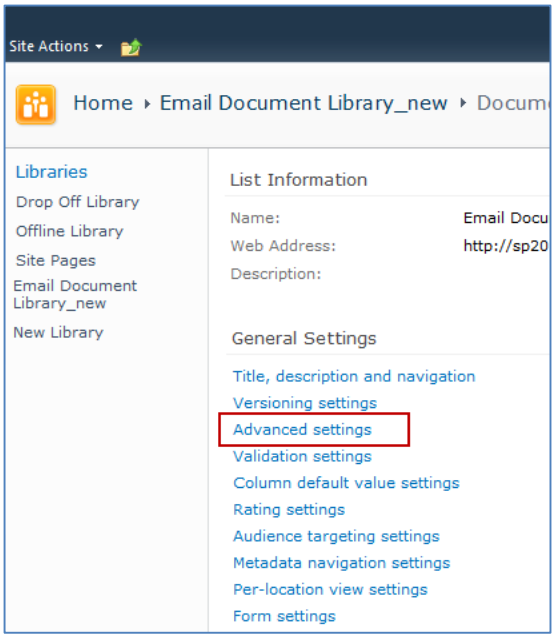
Hiding Columns

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

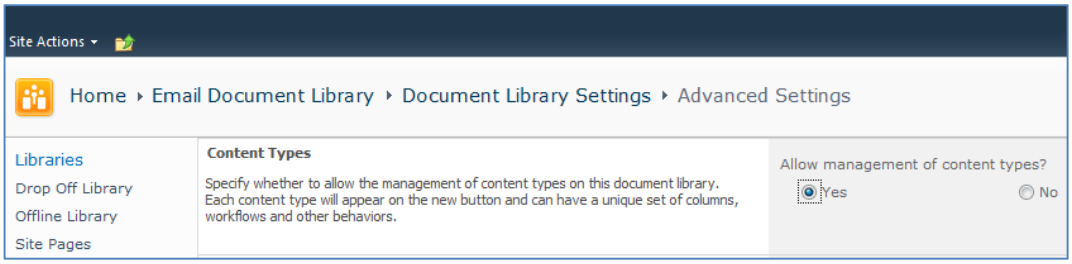
However, Colligo Email Manager still extracts metadata into any hidden columns, and they can still be displayed in views, or used for filters.

Adding a New Content Type to Library

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



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



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

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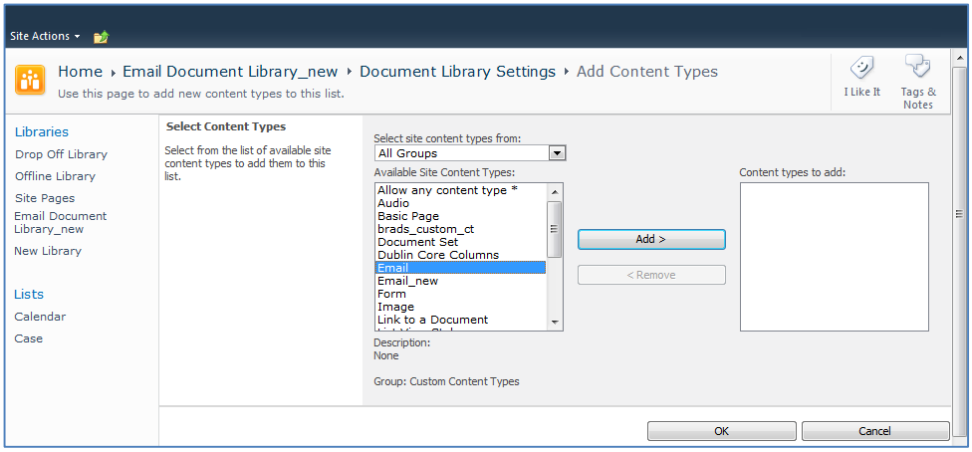
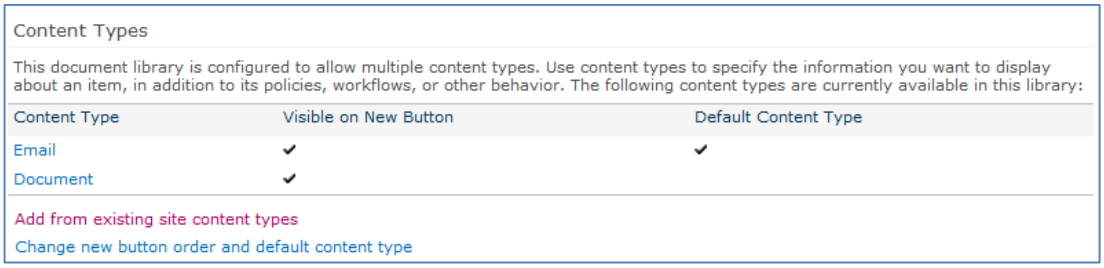
6. Click the **Add from existing site content types** link.
7. In the **Add Content Types** screen, select a content type from the **Available Site Content Types** list, and click **Add**:



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



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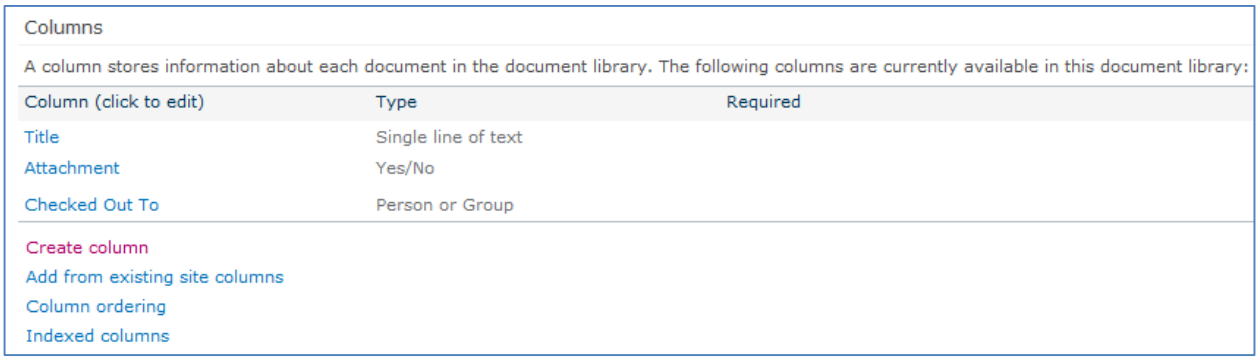
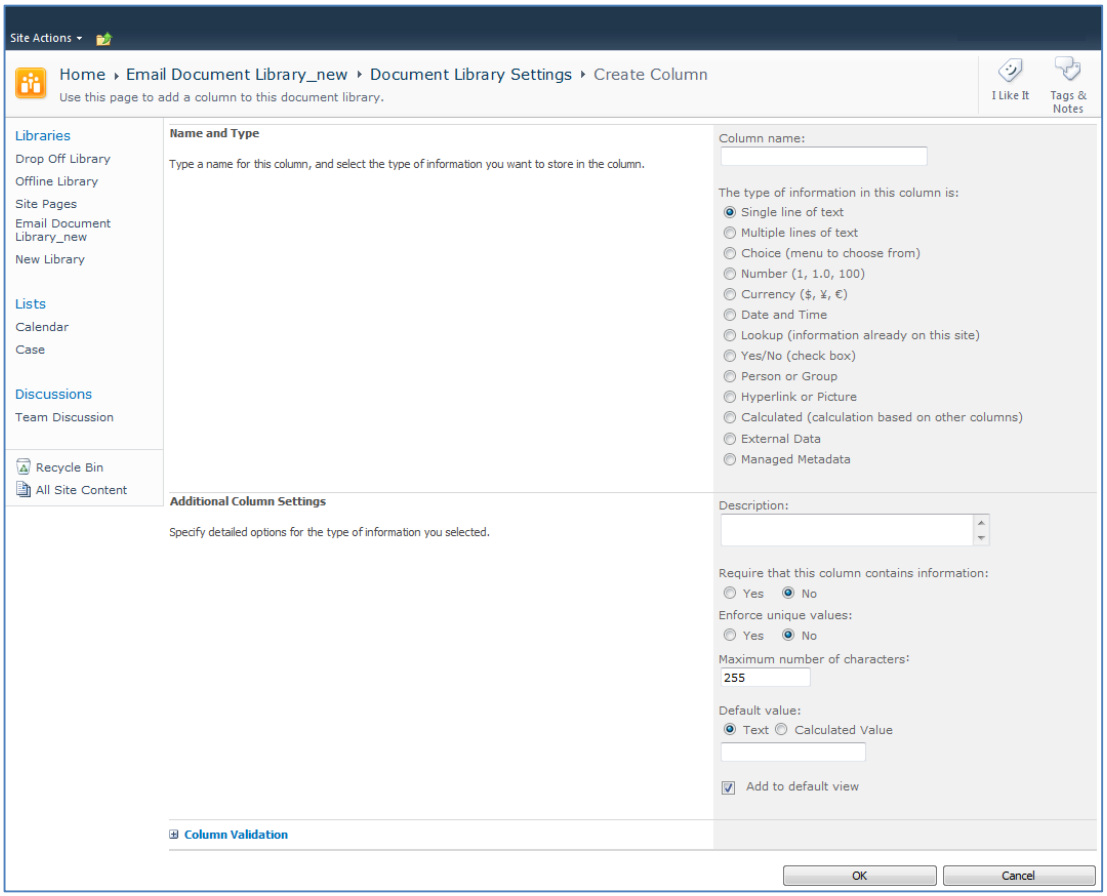
Creating a Library Without Content Types

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**:



The **Create Column** screen displays:



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

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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**

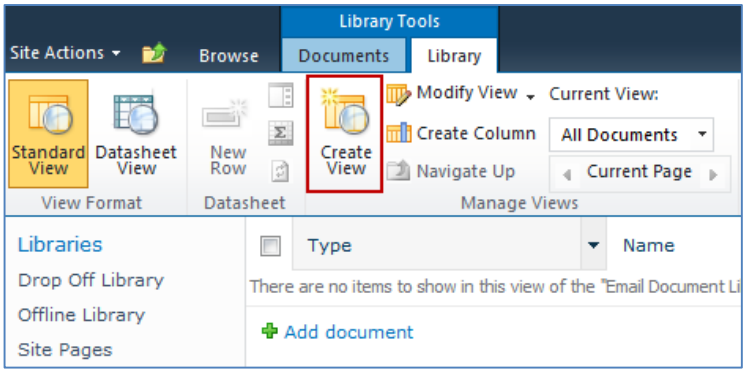
vi. **Add to default view**: check this box if you want this column to display in the default view

4. Click **OK**.
   The new column displays in the **Columns** section in your **Document Library Settings** list.

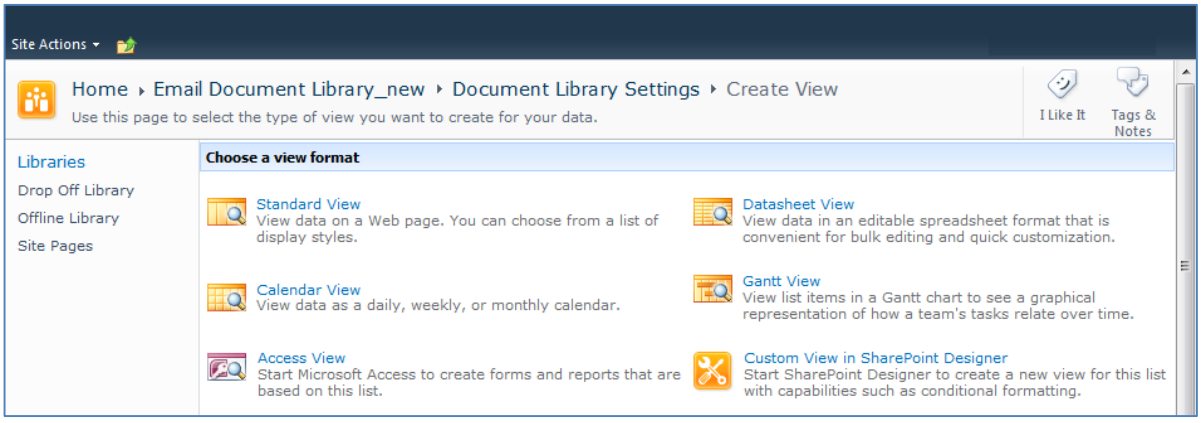
Creating an Email View

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:

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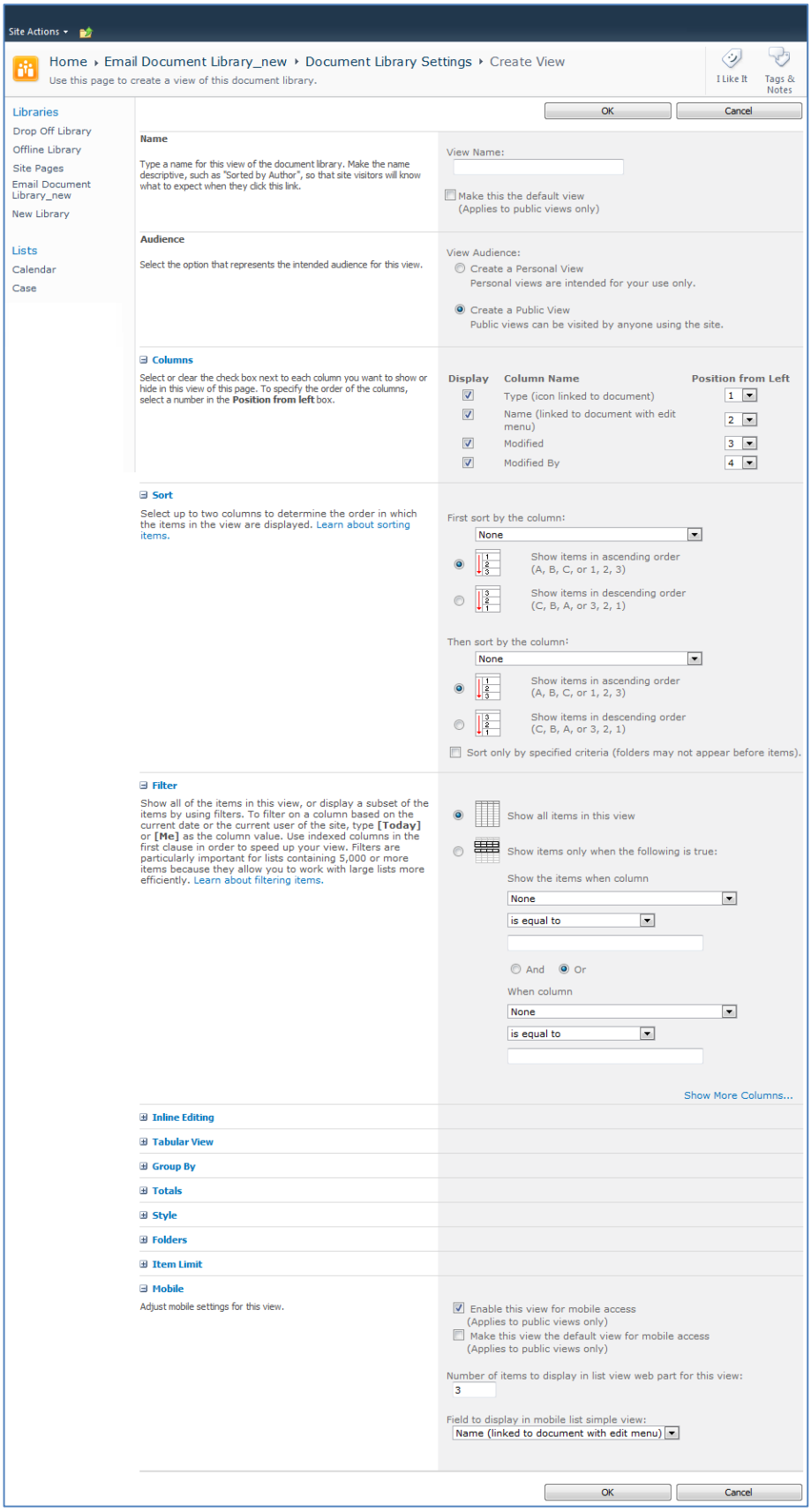

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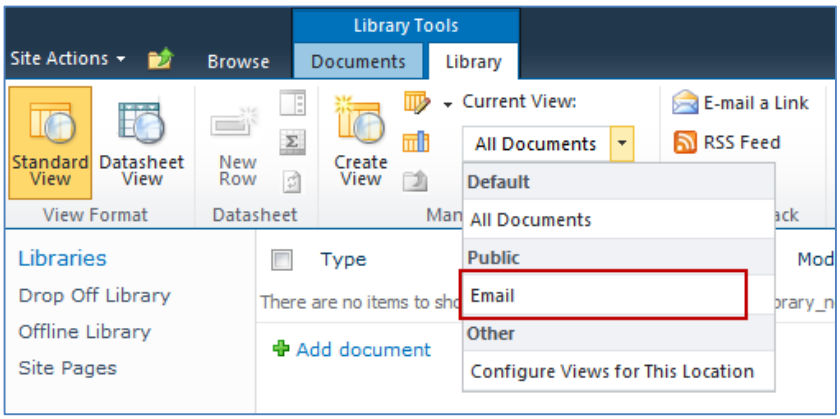
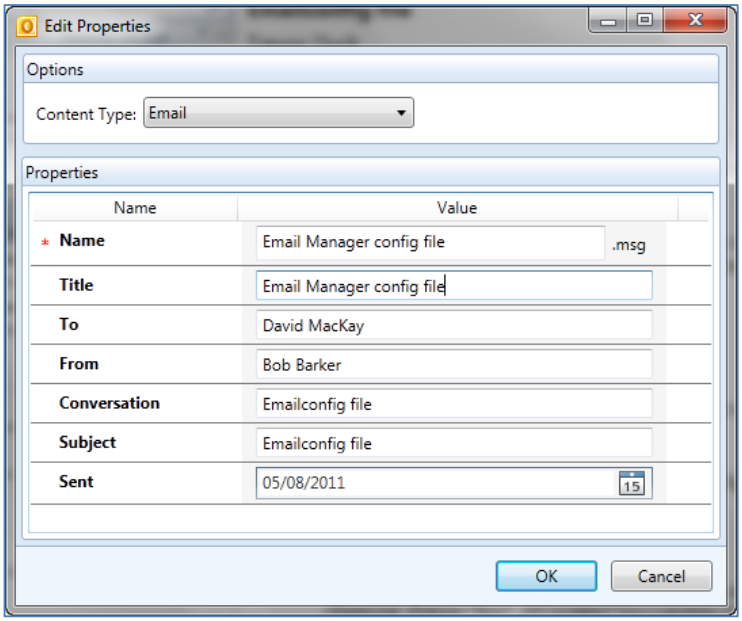
3. Enter the **Name** and **Audience** for your view.
4. Click **OK**. You can now select this view from your **Current View** list in your **Library** ribbon:



Validating Metadata Extraction

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



Changing Column Mappings

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

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

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

Windows Vista/7:

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

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Windows XP:

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

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

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

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


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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	✔	✔
SharePoint Foundation 2013	✔	
SharePoint Server 2013	✔	
SharePoint Server 2010 & SharePoint 2013 Search	✔	

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

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.

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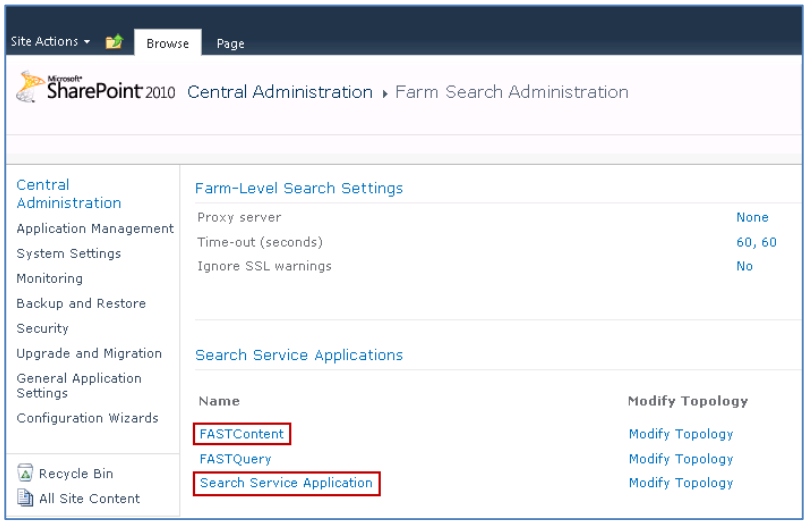
4. Upload at least one document to the library with each metadata column filled out in order for the search crawler to register any new columns.

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:

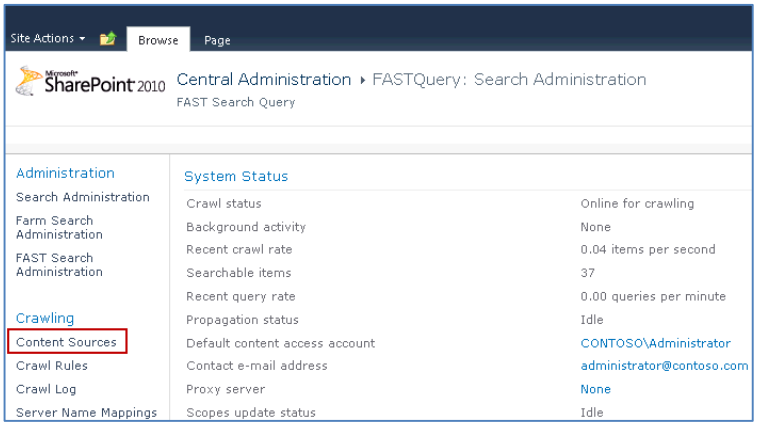
1. In SharePoint's **Central Administration**, go to **General Application Settings > Farm Search Administration**.
2. Depending on whether or not you are using FAST Search, choose one of the following options:
    a. If you are using FAST Search, click **FASTContent**.
    The **FASTQuery: Search Administration**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

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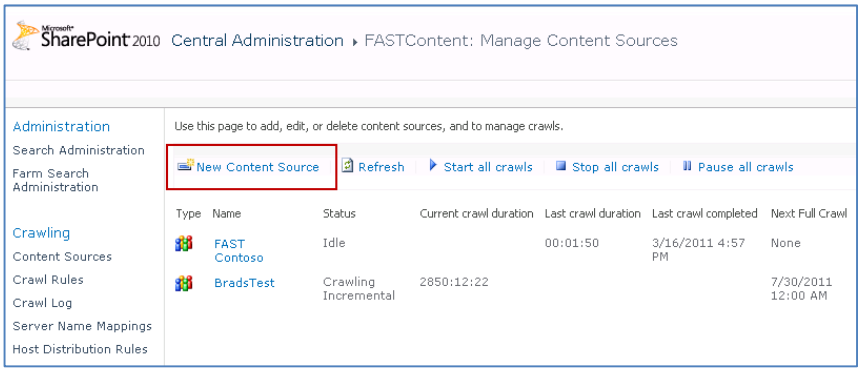
If you are not using FAST Search, the **Search Service Application: Manage Content Sources** page displays.

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



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.

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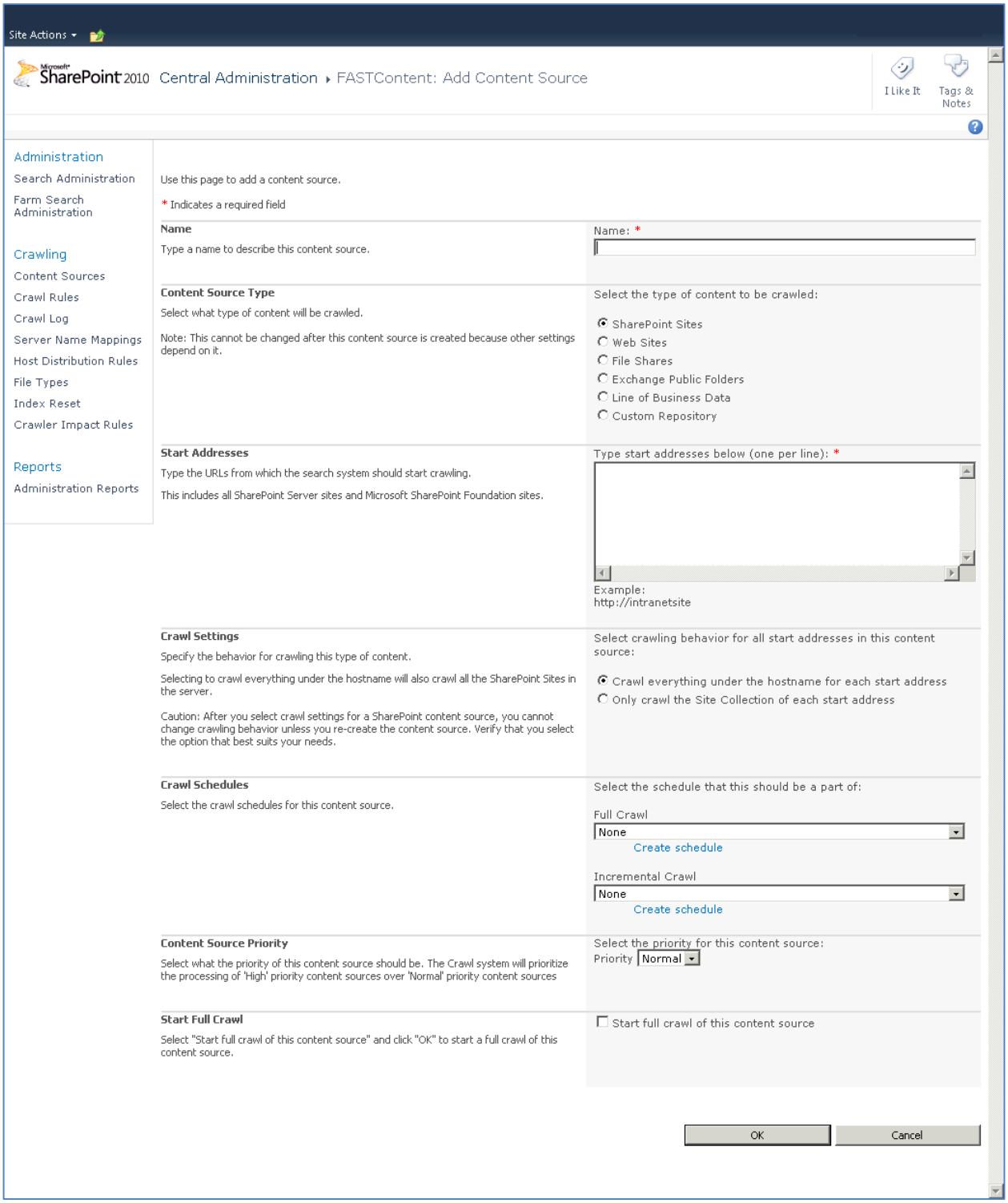

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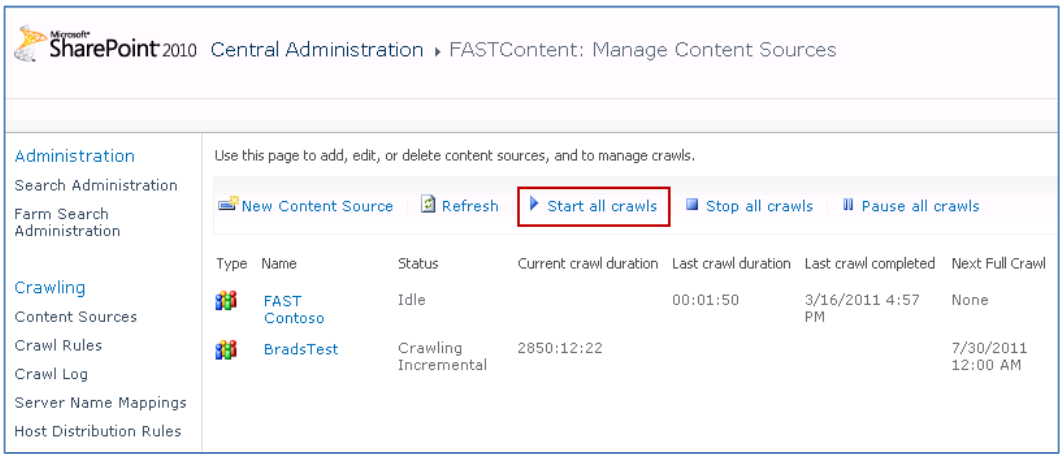
5. After you have added the new content source, return to the **Manage Content Sources** page, and click **Start All Crawls**.



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.
    b. In the **Queries and Results** section, click **Metadata Properties**.
    The **Search Service Application: Metadata Property Mappings** page displays.
4. Click **New Managed Property**.

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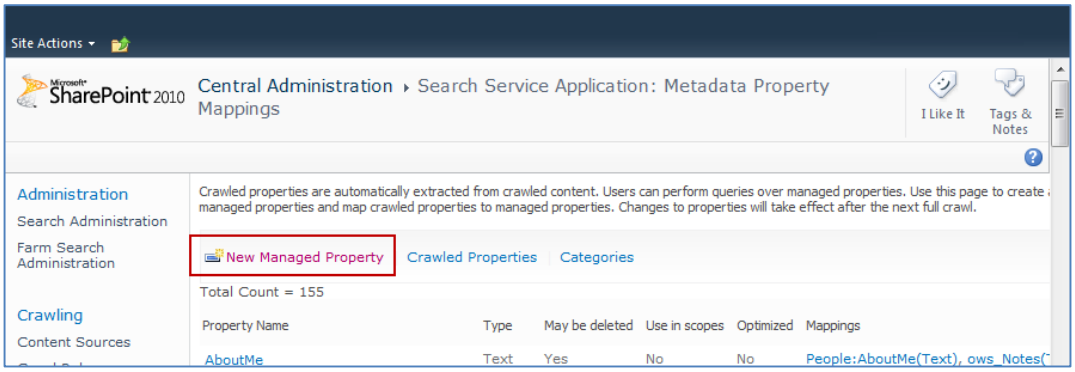
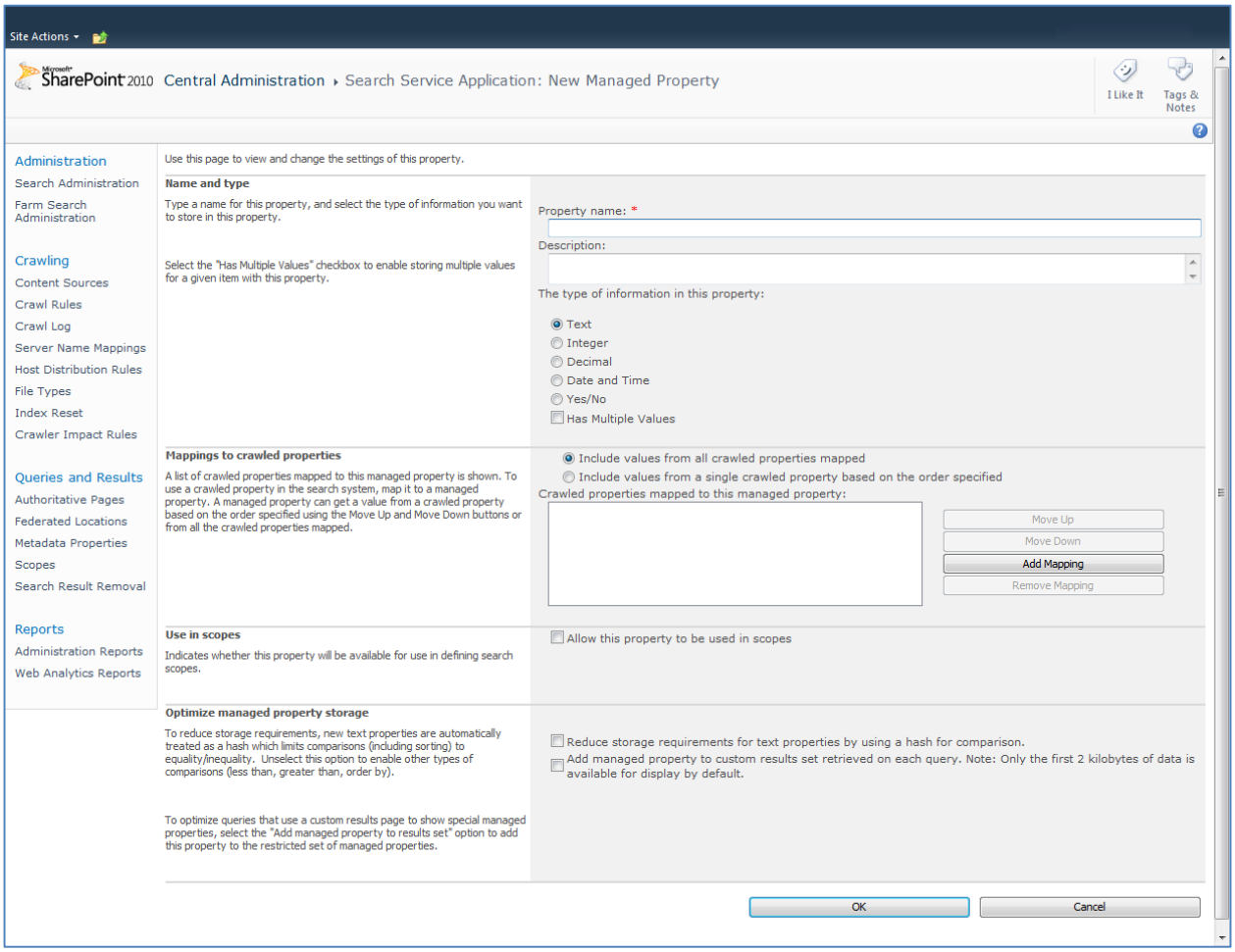


The **New Managed Property** screen displays:



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:

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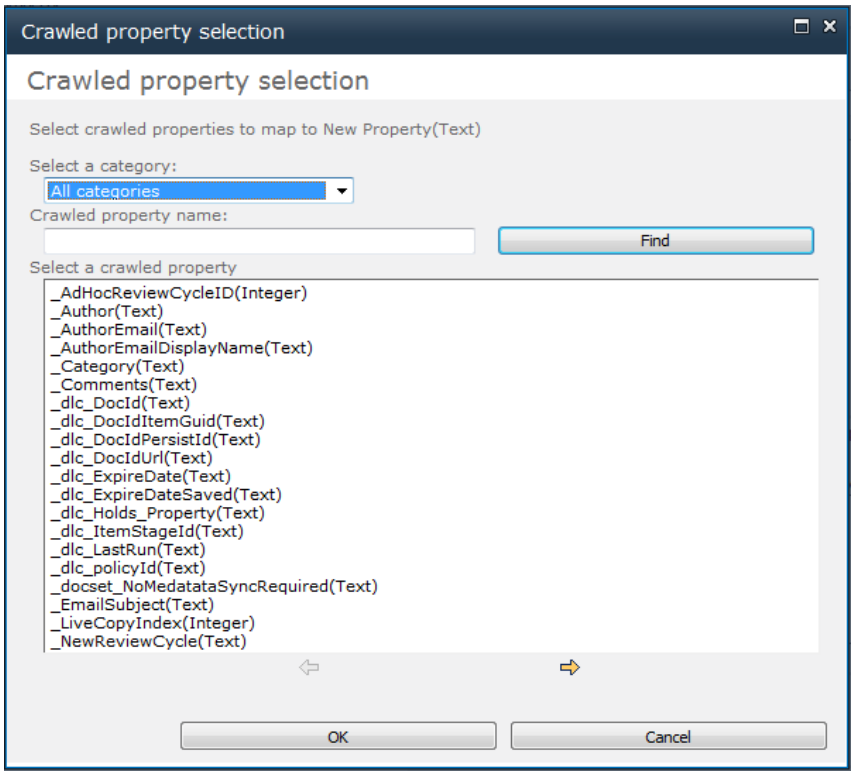

i. Use the **Select a category** drop-down to filter the available properties, or enter a property in the **Crawled property name** field and click **Find**.
ii. Select a crawled property from the list and click OK to add it to the mapping.
iii. In the **Available crawled properties** list and click **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**.

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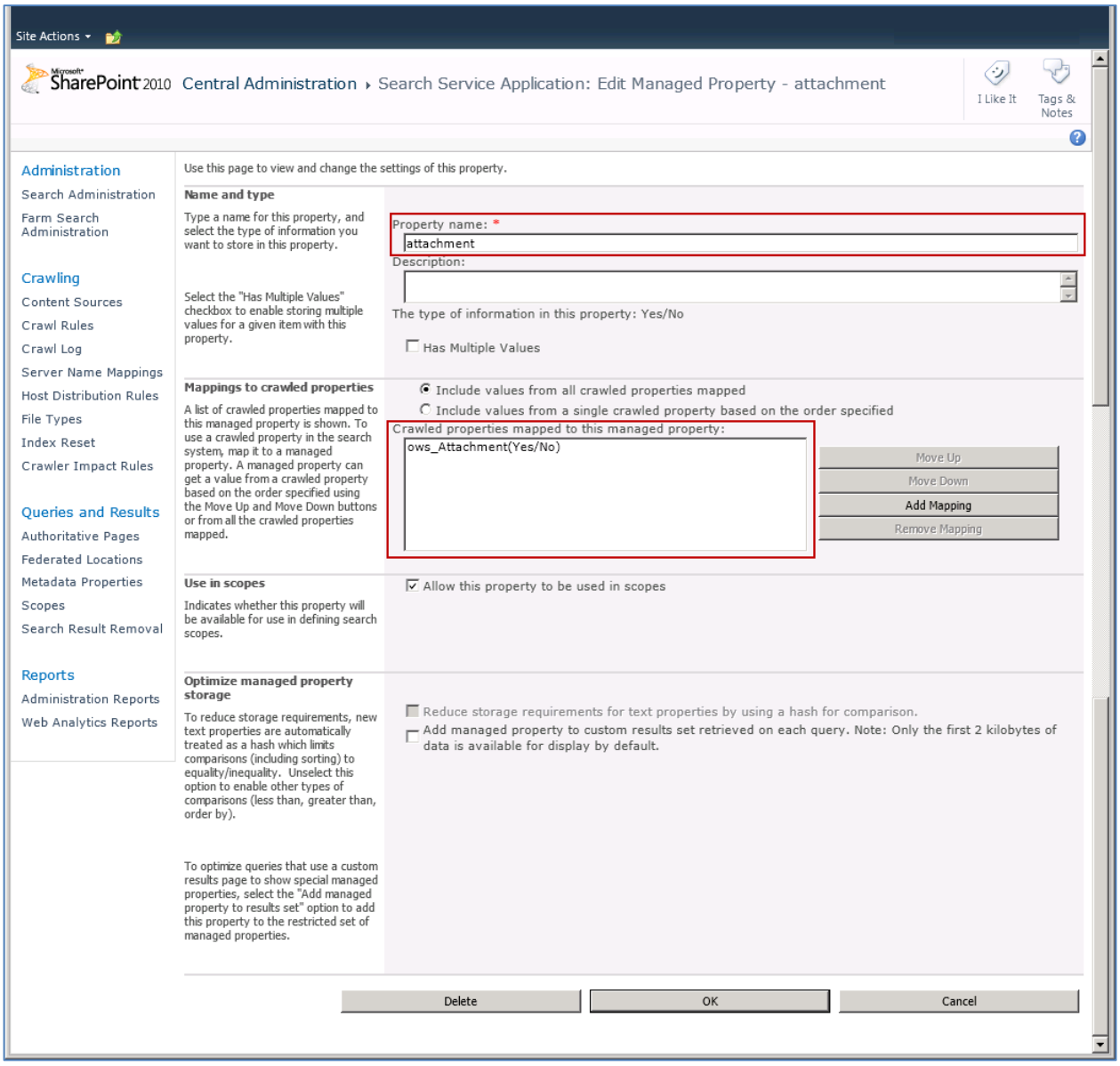
Enabling the Attachment Property in Search

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:



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.

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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**.

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Configuring Local Machines

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

   Windows Vista/7:
   - C:\Users\%username%**AppData\Roaming**\Colligo\EmailManager\Config\
   - C:\Users\%username%**AppData\Local**\Colligo\EmailManager\Config\

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

2. Use the crawler mapping names to populate the configuration file.
   NOTE: Columns are case sensitive

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

Uninstalling Colligo Email Manager

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

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

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