Colligo Email Manager 6.0

Connected Mode - User Guide

Contents

COLLIGO EMAIL MANAGER

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

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

Benefits

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

Key Features

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

Platforms Supported

- SharePoint 2010, SharePoint 2010 Online (Office 365), and SharePoint 2013
- Outlook 2007 and 2010 (32-bit and 64-bit)
- Windows XP, Windows Vista, Windows 7, and Windows 8

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

# INSTALLING AND ACTIVATING COLLIGO EMAIL MANAGER

Email Manager can be installed in one of two modes. Before you install Email Manager, ensure that you have chosen the correct mode; if you want to change modes, you will need to uninstall and reinstall the program.

- **Connected**: If you install Email Manager in Connected mode, you do not have the ability to synchronize content so it is available for viewing and editing offline; you can only access your SharePoint content when you are connected to your SharePoint server. *NOTE*: SharePoint 2007 is not supported in Connected mode.
- **Offline**: If you install Email Manager in Offline mode, you have the ability to synchronize content so it is available for viewing and editing offline; your SharePoint content is available to you even if you are not connected to your SharePoint server.

  NOTE: This user guide addresses Colligo Email Manager Connected mode only.

To install and activate Colligo Email Manager:

1. Double-click to open the Colligo Email Manager XX.zip file and extract the contents.
2. In the folder, double-click the folder that corresponds with your operating system:
   a. **x86**: choose this option if you have a 32-bit operating system
   b. **x64**: choose this option if you have a 64-bit operating system
4. Double-click either **Setup.exe** or **ColligoEmailManager_xNN.msi**.
5. Follow the steps in the install wizard.
6. After installation is complete, enter your information to activate the software. If you do not activate Colligo Email Manager, the Outlook add-in does not display.
7. If you are unable to connect to the activation server, the following error message displays:
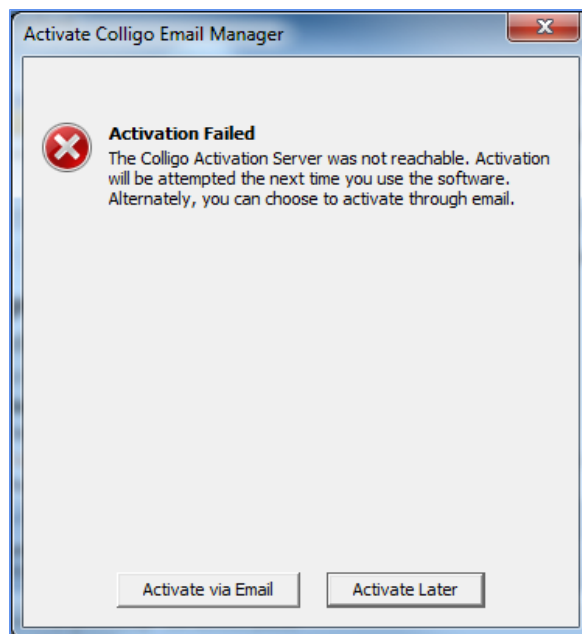
NOTE: The inability to connect could be due to firewall settings in your corporate network or a dropped internet connection. If the connection issue is temporary, Colligo advises to attempt activating at a later time before trying activation by email.

8. Click **Activate by Email.**
9. One the following screen, click **Export Activation Request**.
10. Save the ActivationRequest.txt file in your preferred location.
11. Attach this file to an email and send to support@colligo.com.

You will receive a response from Colligo Technical Support with instructions for manual activation.

After Colligo Email Manager is installed, a new group called **Colligo Email Manager** displays in the left-hand pane in Microsoft Outlook:
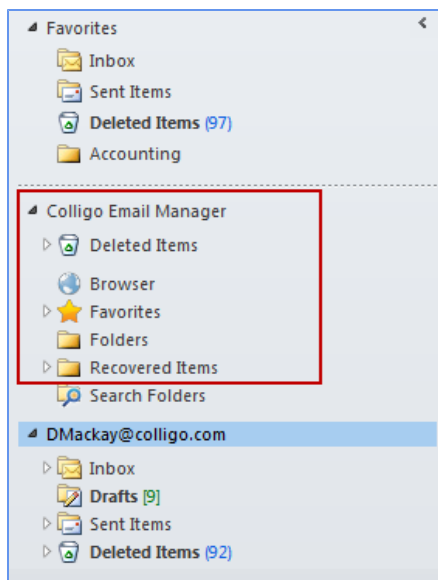
You can now add SharePoint sites and designate folder locations for your Favorites and Folders lists.

Checking for Updates

To check if you are using the most current version of Colligo Email Manager, click the **Colligo** drop-down arrow and select **Check for Updates**.

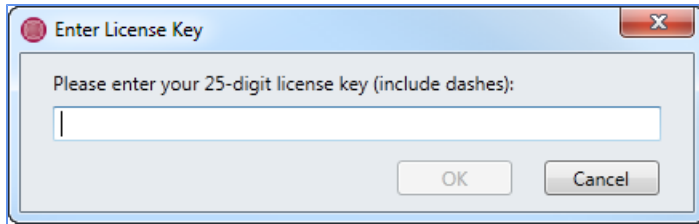The www.colligo.com site launches in your web browser. If there is a newer version available, click the **Download the latest version now** link to install the newer build.

Updating Your License Key

To change your license key:

1. Click the **Colligo** drop-down arrow and select **Install License Key**.

    The **Enter License Key** dialog displays:

2. Enter your license key and click **OK**.

MANAGING SHAREPOINT SITES

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

Adding a SharePoint Site

You can add a SharePoint site in one of two ways:

1. Using the SharePoint Sites dialog in Outlook.
2. Using the Connect to Colligo Email Manager button in Internet Explorer.

Using the SharePoint Sites Dialog in Outlook

1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.

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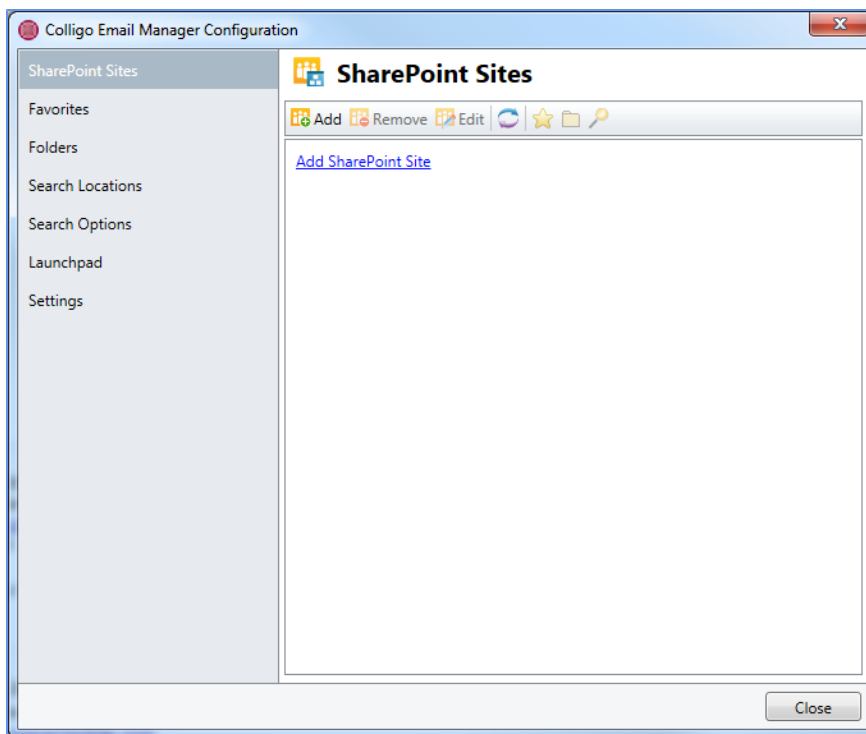
2. Click the **Add SharePoint Site** link or the **Add** icon.

    The **Add SharePoint Site** dialog displays:

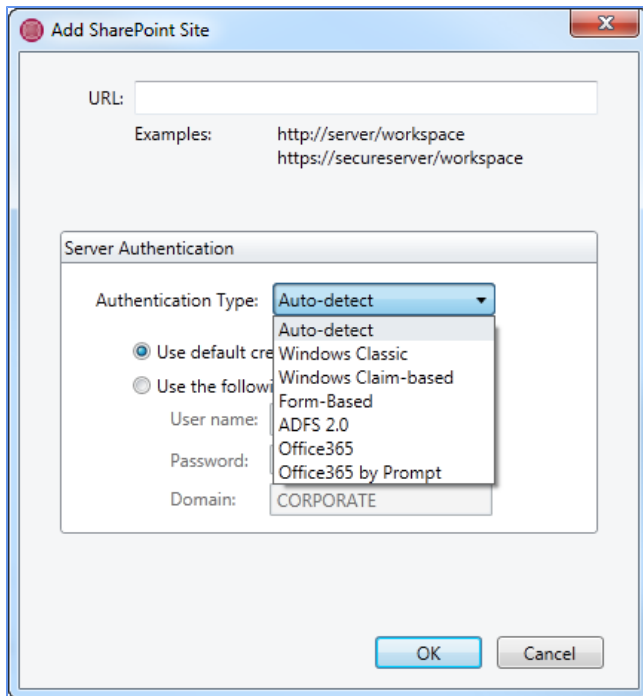3. Enter the following information in the dialog:

    a. **URL**: enter the web address of the SharePoint site you want to add. You can type or copy-and-paste the address, or drag-and-drop an address from Internet Explorer into the field.

    b. **Server Authentication**
        - **Authentication Type**: choose one of the following options
            - Auto-detect
            - Windows Classic
            - Windows Claim-based
            - Form-Based
            - ADFS 2.0
            - Office365
            - Office365 by Prompt
        - **Use default credentials**: select this option to choose default credentials
        - **Use the following credentials:** select this option to enter user-specific credentials and enter the following information:
            - Username
            - Password
            - Domain

4. Click **OK**. The site displays in the list. You can expand the site to see the subfolders:
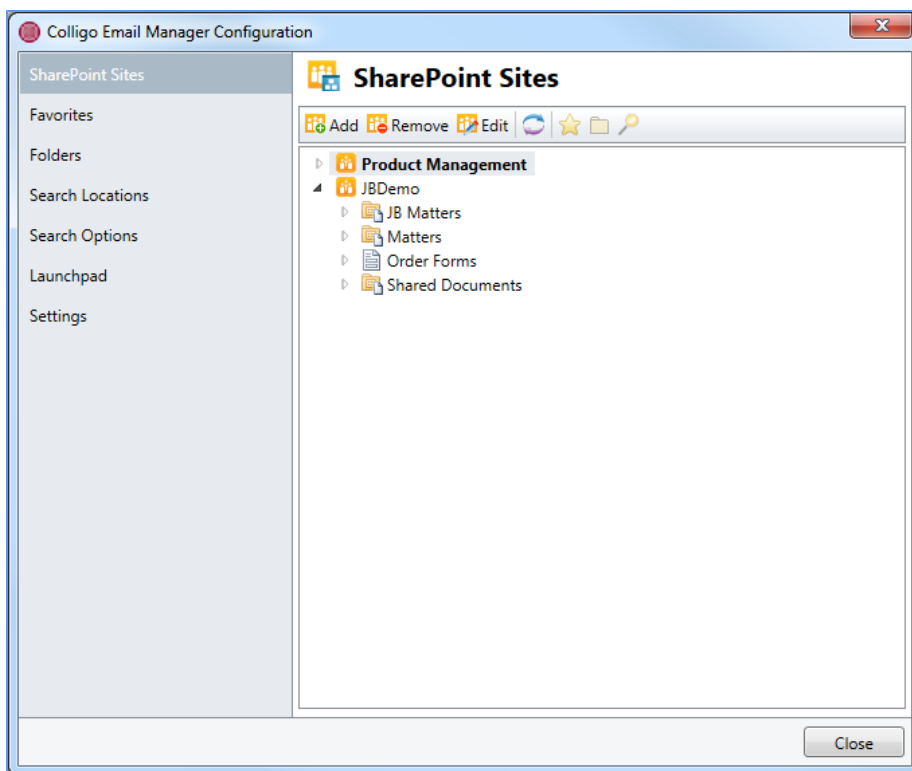
Using the Connect to Colligo Email Manager Button in Internet Explorer

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

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

1. Navigate to the SharePoint site or library that you want to add to Colligo Email Manager and click the **Connect to Colligo Email Manager** button:
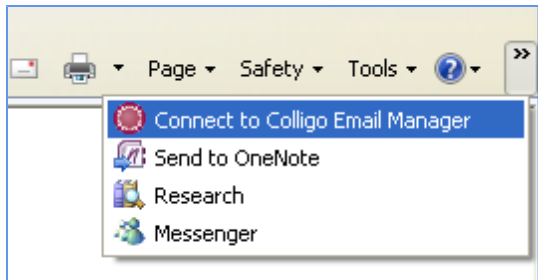
   Internet Explorer 9:
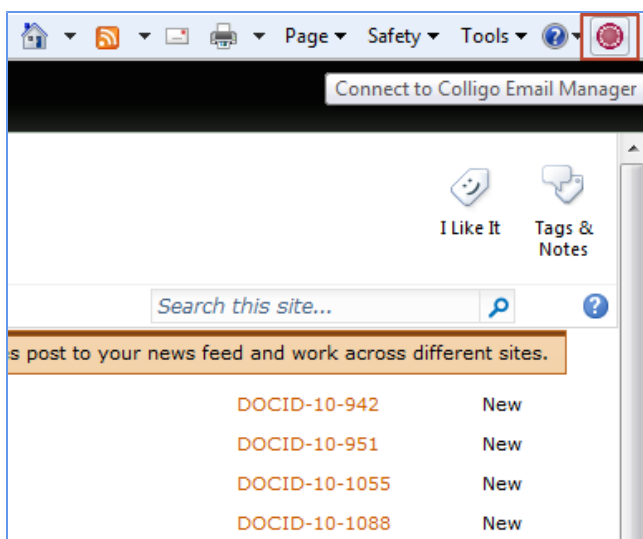
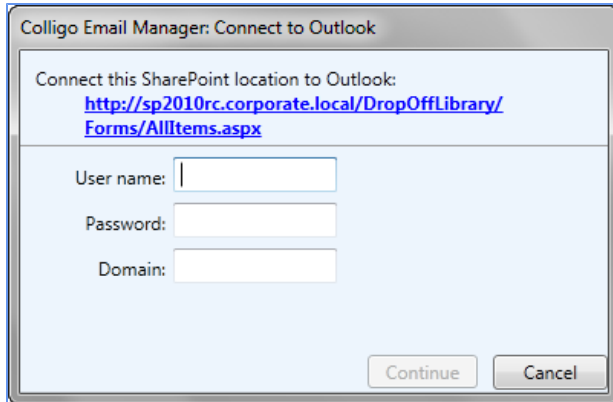NOTE: If the **Connect to Colligo Email Manager** button is not visible, you need to enable the Command bar.
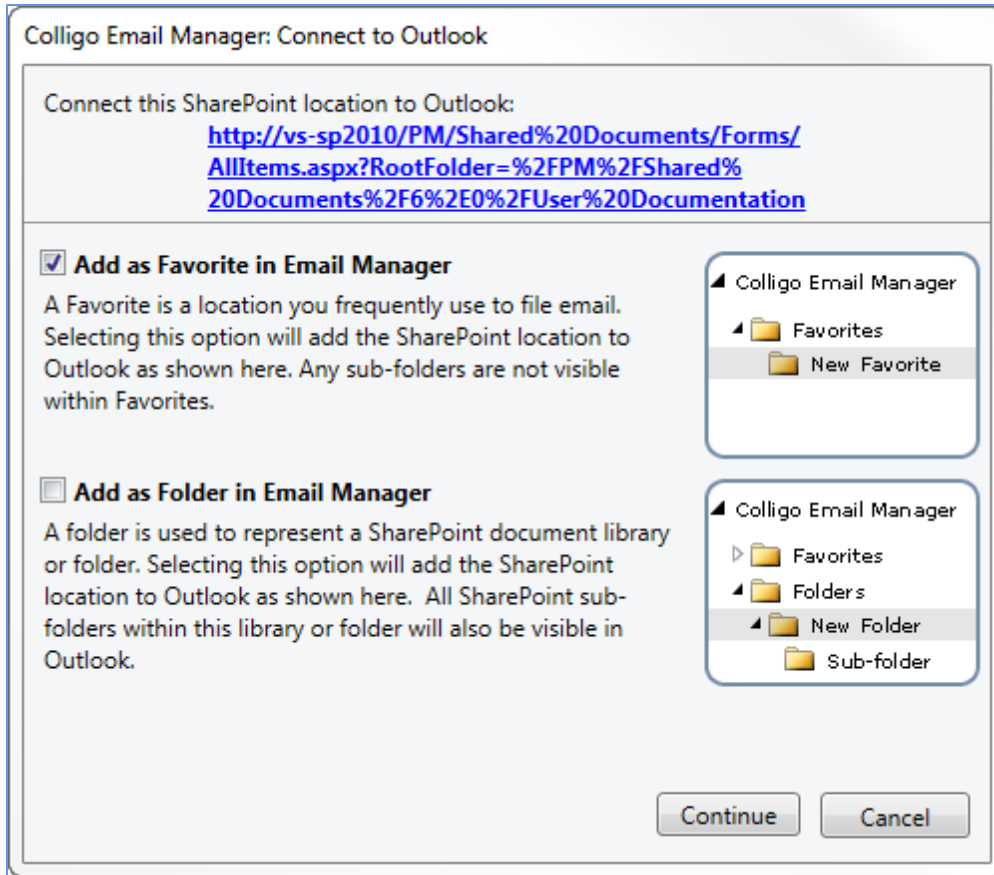
Internet Explorer 8:

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

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

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

   The following screen displays.

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

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

5. Check the **Add as Folder in Email Manager** box to add the location to your Folders list

When the connection is complete, the site or library now displays in your **SharePoint Sites** list and, depending on which boxes you checked, your **Folders** and/or **Favorites** list in Colligo Email Manager.

Enabling the Command Bar in IE 9

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

To enable the Command bar:

1. Right-click in the white space at the top of your browser window:
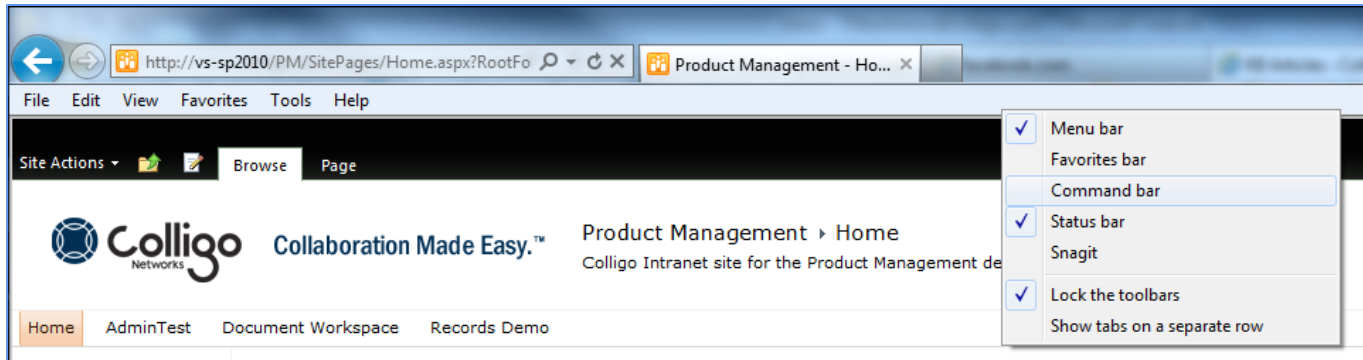
2. Select the **Command bar** option.

    The Command bar displays at the top of your browser.

Removing a Site

To remove a site from the Colligo Email Manager group:

1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
2. In the SharePoint Sites list, click the site you want to remove and click Remove.

    A dialog asks for confirmation of the deletion.

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

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

Editing a Site

To edit a site in the Colligo Email Manager group:

1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
2. In the **SharePoint Sites** list, click the site you want to edit and click **Edit.**

    The **Edit SharePoint Site** dialog displays.

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

## Adding a Folder to the Favorites List

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

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

1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.

2. In the **SharePoint Sites** list, select the site and the folder within the site that you want to add to your Favorites and click the **Add Favorite** icon: .
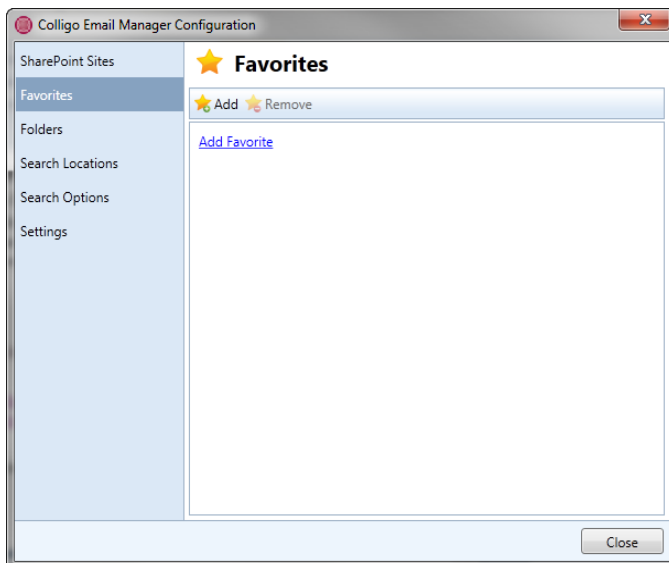
   The folder displays with the Favorites star beside it:
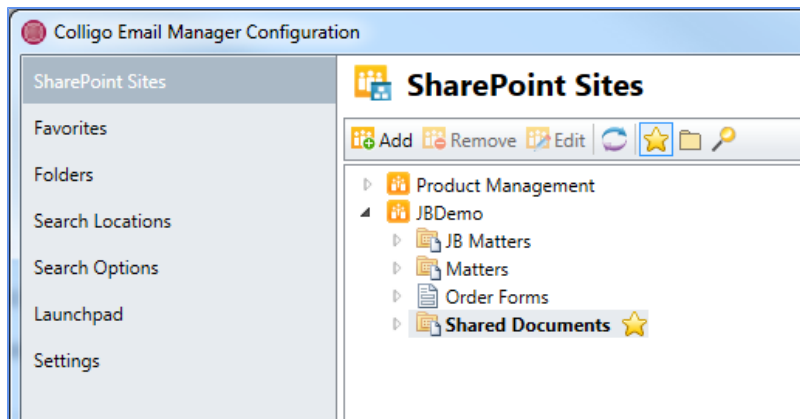
OR

1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.

2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Favorites**.

    The **Favorites** dialog displays:

3. Click the **Add Favorite** link or the **Add** icon.
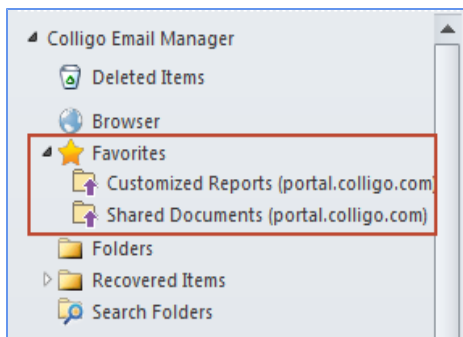
   The **Add Favorite** dialog displays:
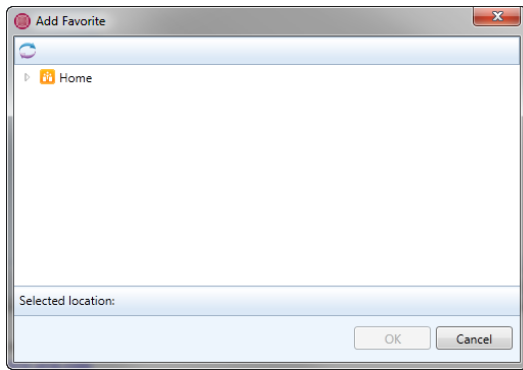
4. Browse to the location of the folder you want to add to your Favorites list, and click **OK**.

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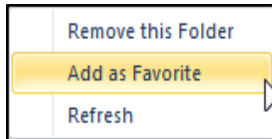
Any folders added display under **Favorites** in the Colligo Email Manager list:

You can now use the folders to view, upload, and download your SharePoint files. Click on a folder to view its contents:
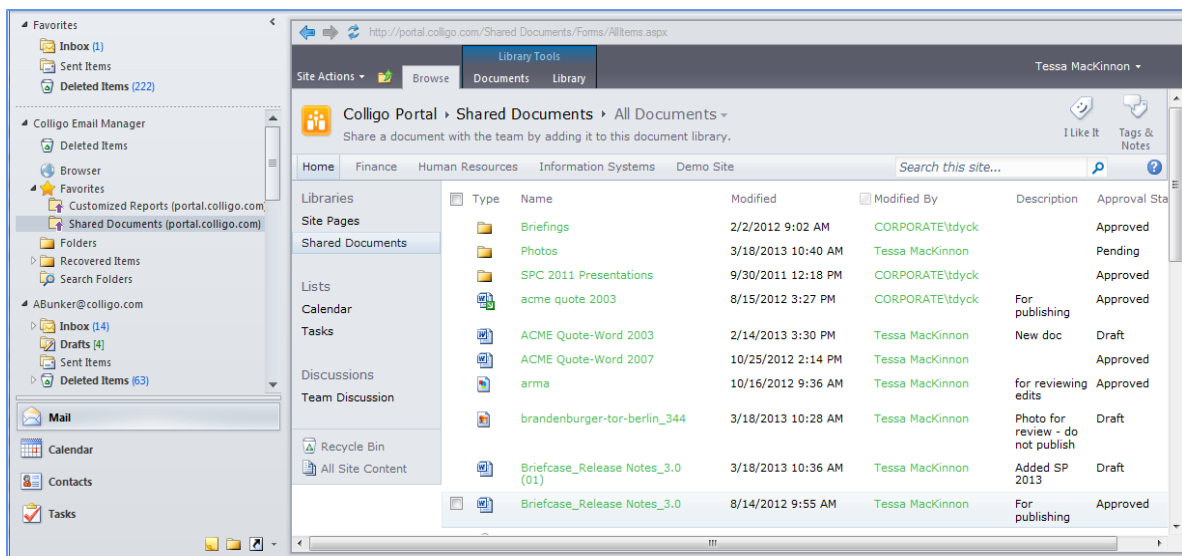
NOTE: you can also add a folder to your Favorites list by right-clicking on a folder under the Folders list and selecting **Add as Favorite** from the contextual menu:
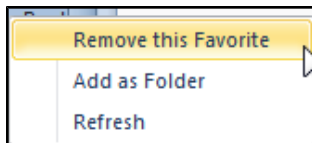
Removing a Folder from the Favorites List

1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.

2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Favorites**.

   The **Favorites** dialog displays.

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

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

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


Adding a Folder to the Folders List

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

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

1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.

2. In the **SharePoint Sites** list, select the site and the folder within the site that you want to add to your Folders list and click the **Add Folder** icon: .
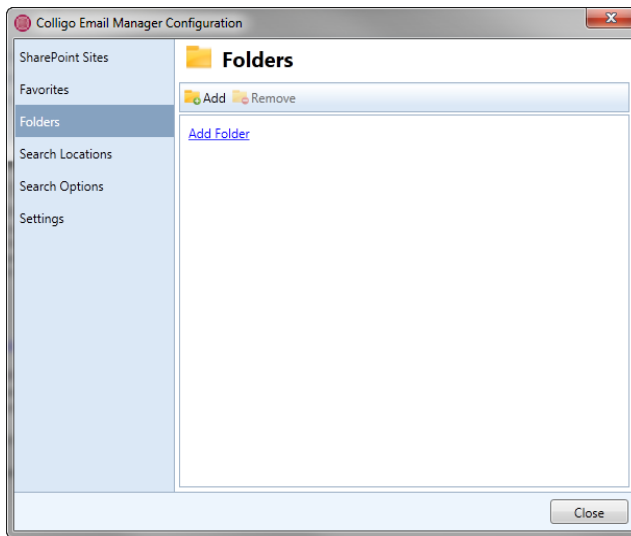
   The folder displays with the folder icon beside it:
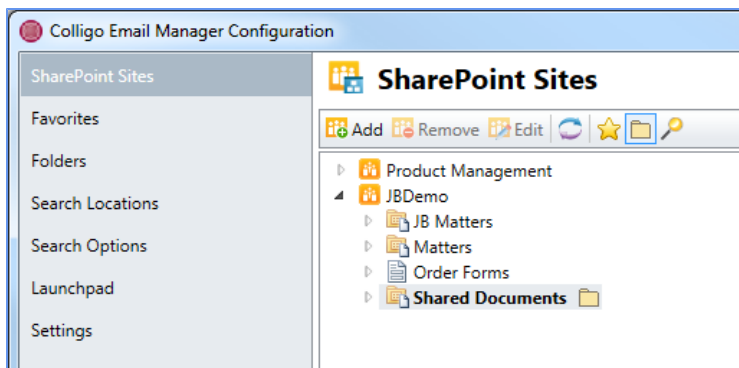
OR

1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Folders**.

   The **Folders** dialog displays:

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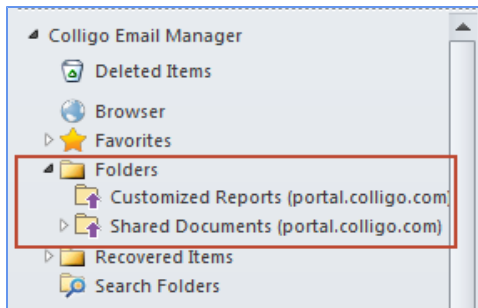
   The **Add Folder** dialog displays:
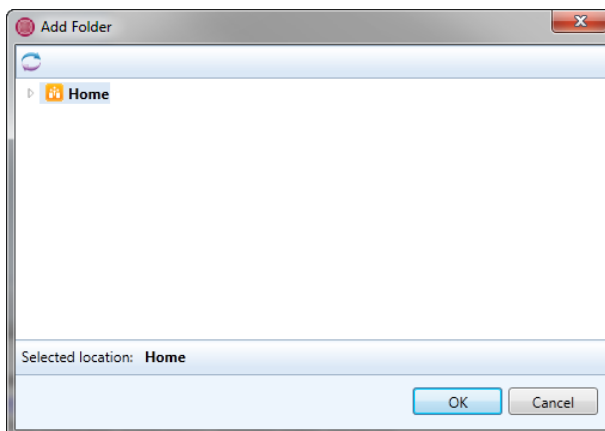
NOTE: if you right-click **Folders** under the Colligo Email Manager list in Outlook, you can select **Add Folder** from the contextual menu and the above **Add Folder** dialog displays.

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

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

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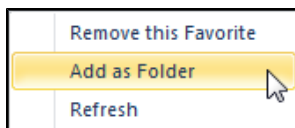

NOTE: As a best practice, it is recommended that you do not add folders with more than 50 sub-folders to your Folders list, as they will take a long time to populate and refresh. If there is a top-level folder that has a number of subfolders to which you frequently file emails, it is recommended that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

Removing a Folder from Folders List

1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Folders**.
3. Select the folder you want to remove and click **Remove.**

The folder is removed from your Folders list.

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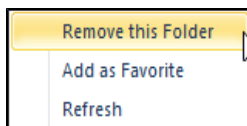
Refreshing a Site

To refresh a site in the Colligo Email Manager list:

1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.

2. Click on the site you want to refresh and click the **Refresh** icon: .

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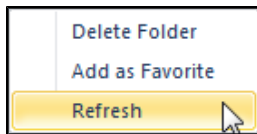
MANAGING SETTINGS

To manage your settings:

1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Settings**.
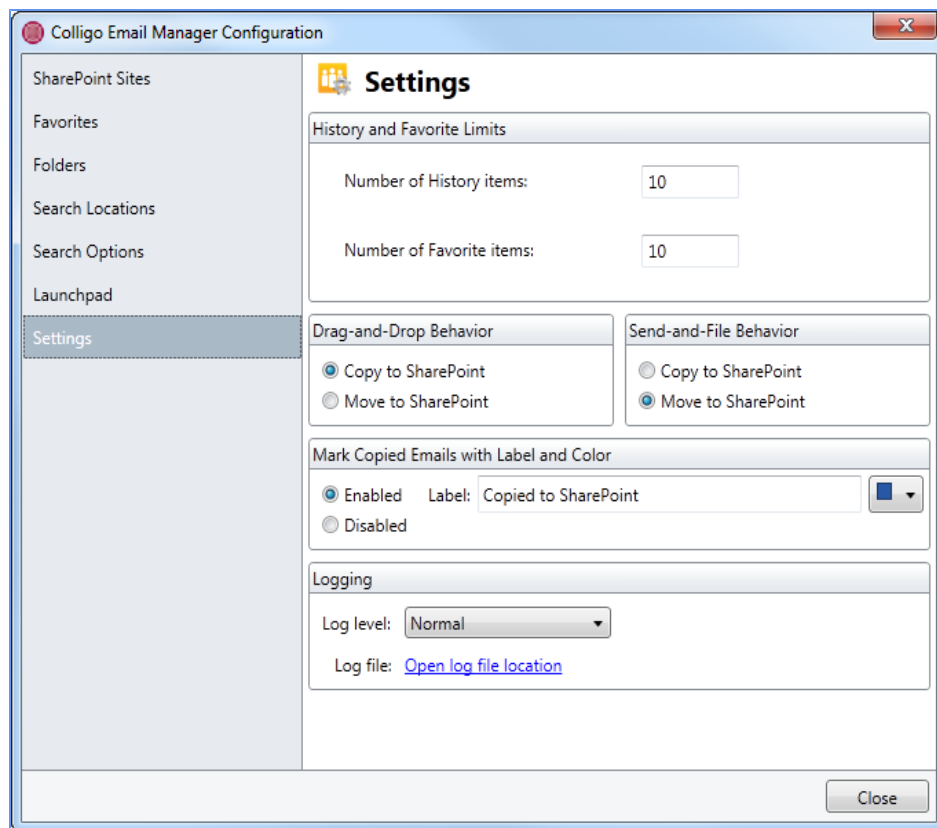
   The **Settings** dialog displays:

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

     NOTE: the History and Favourite items numbers must be between five and 50
4. In the **Drag-and-Drop Behavior** and the **Send-and-File Behavior** sections, choose one of the following options:
   - **Copy to SharePoint**: choose this option if you want to retain a copy of the email in Outlook as well as filing a copy in SharePoint
   - **Move to SharePoint**: choose this option if you want to move the email to SharePoint without retaining a copy in Outlook

NOTE: If you choose the **Move to SharePoint** option as the default behavior, you have the option to right-click and drag one or more items into a destination folder, and a contextual menu displays, giving you the option to **Copy** OR **Move** the item.

5. In the **Mark Copied Emails with Label and Color** section,
   - **Enabled**: if this setting is enabled, the text in the Label field displays in the header of any email that has been copied to SharePoint
   - **Disabled**:if this setting is disabled, there is no indication in the header of an email header that has been copied to SharePoint
   - **Label**: The default text in the label field is Copied to SharePoint; enter a new label if preferred
   - **Color**: Choose an Outlook color category from the drop-down menu for the label to display in

6. In the **Logging** section, select the preferred option from the **Log level** drop-down menu:
   - **Off**: select this option if you don't want to log any information about any activity errors or warnings
   - **Normal**: select this option to log information about activity, errors, and warnings

     NOTE: this is the default logging level

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

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

7. The **Logging** section allows you to set the level of detail you want to have in your error log files. These log files assist Colligo technical staff in solving any issues that may arise while using Colligo Email Manager. Click **Open log file location** to access the log files.

MANAGING EMAILS

You can move emails and attachments from Outlook into SharePoint folders in one of the following ways:

1. Dragging-and-dropping emails.
2. Using the Move and Copy buttons in the Colligo Email Manager group.
3. Using contextual menu options.

If you choose to move an email, there is no longer a copy of it in your Outlook account. If you choose to copy an email, a copy is retained in your Outlook account.

Dragging and Dropping Email

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

If your default behavior is set to **Move**, you have the option of doing a right-click drag-and-drop that displays the following dialog, giving you the option to **Copy**:
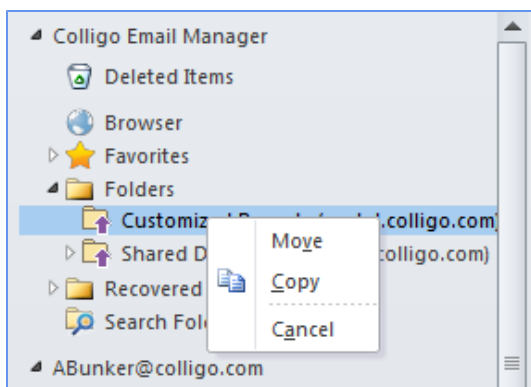

NOTE: if you have a folder in your Folders list that has numerous subfolders that you have to scroll through to find the folder to drag-and-drop your email into, it is easier to use the **Move/Copy** buttons and use the filter feature to isolate the folder. See **Using the Move and Copy Buttons**.

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

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

   The **Edit Properties** dialog displays:
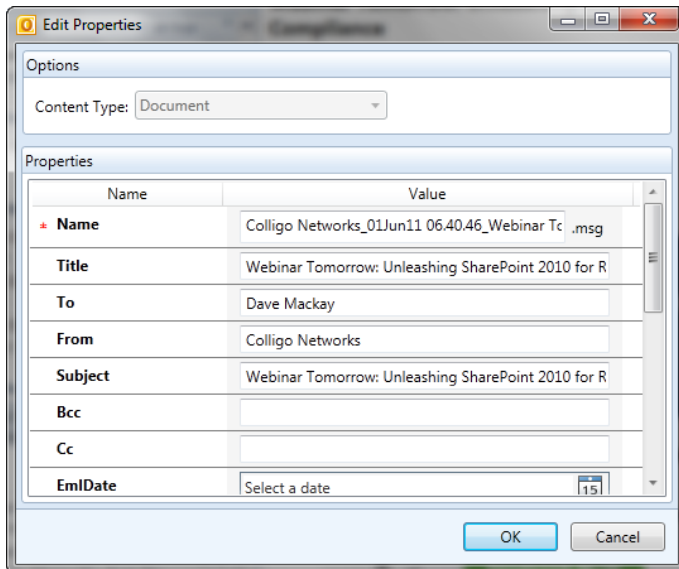
3. In the **Options** section, choose the **Content Type** from the drop-down menu.

4. In the **Properties** section, modify the fields as preferred.

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

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

   NOTE: If you have enabled the **Copied to SharePoint** setting, the marker displays in the header of the email and in the list view:
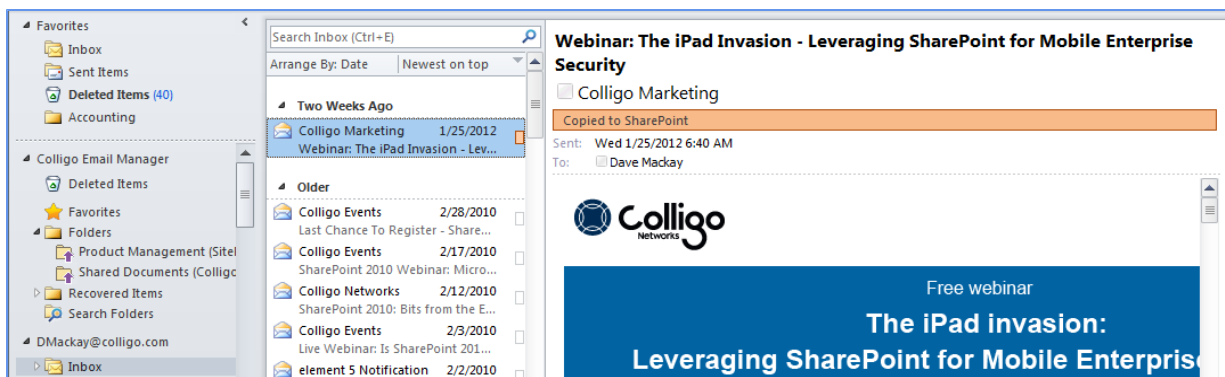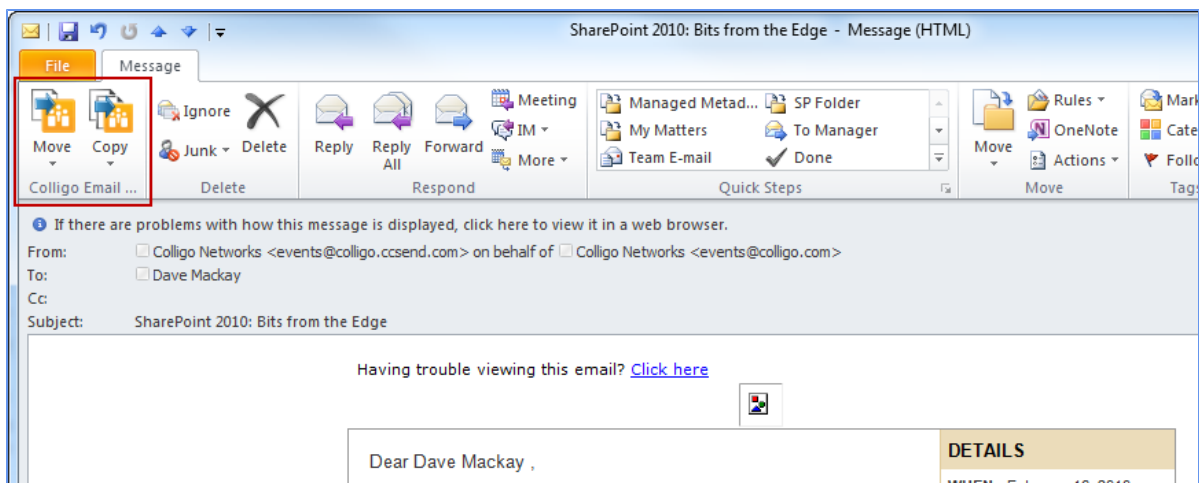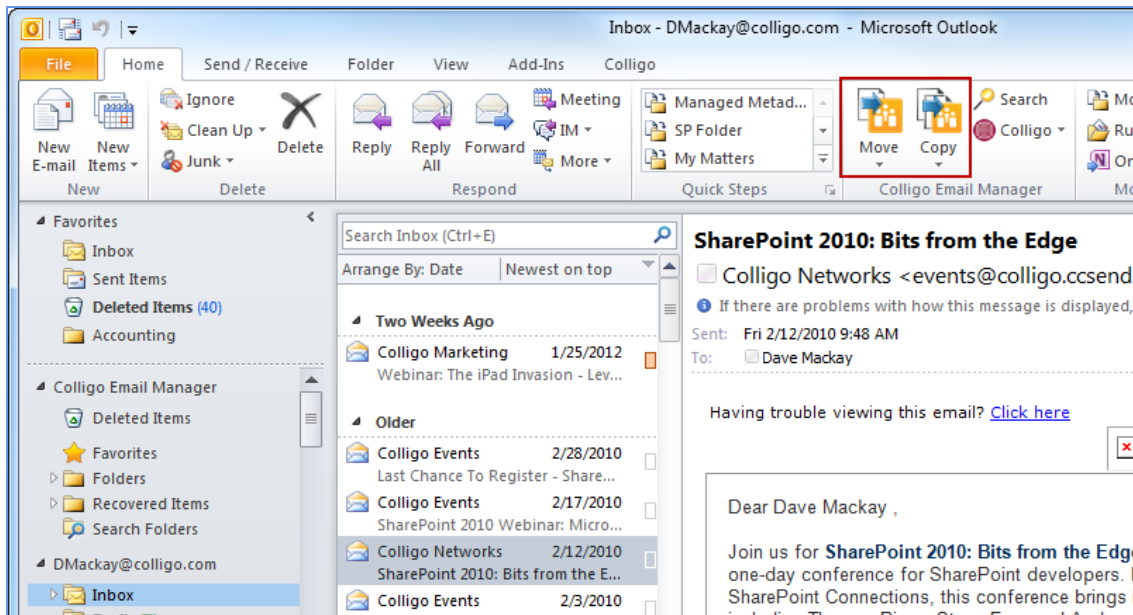

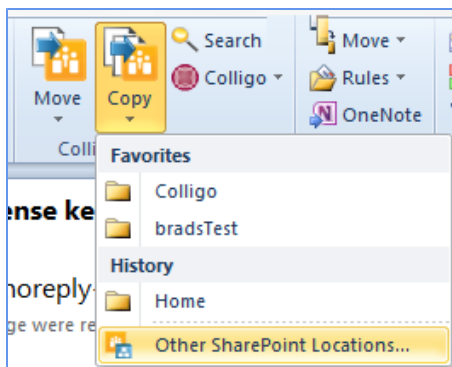   To enable or disable this setting, see Managing Settings.

Using the Move and Copy Buttons

To move or copy an email to a SharePoint folder:

1. In Outlook, select the email you want to move or copy, or double-click it to display it in its own window. The **Move** and **Copy** buttons display in both views:

2. From the drop-down menu, choose the folder you want to move your email to:

3. If the folder you want is not in your **Favorites** or **History** list, select **Other SharePoint Locations.** The **Select Move/Copy Destination** dialog displays:
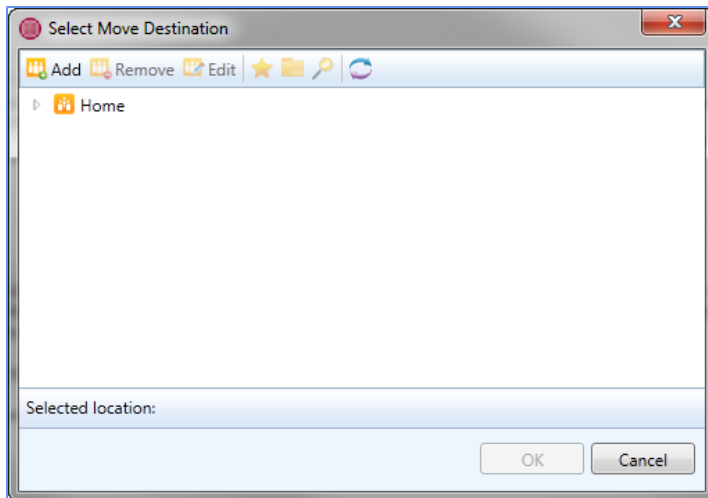
NOTE: When you are offline, locations that are not set to upload-only are greyed out. If you want to be able to file items to specific locations when offline, ensure that you set them as upload-only prior to going offline.

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

   NOTE: If you are filing to a location that has not been set as upload-only, you can set it by double clicking it. You cannot do this when you are offline.

5. Click **OK**. The **Edit Properties** dialog displays.
6. Choose your **Content Type** and enter the **Properties** as needed.
7. Click **OK** to complete the process.

NOTE: If you have enabled the Copied to SharePoint setting, the marker displays in the header of the email and in the list view:
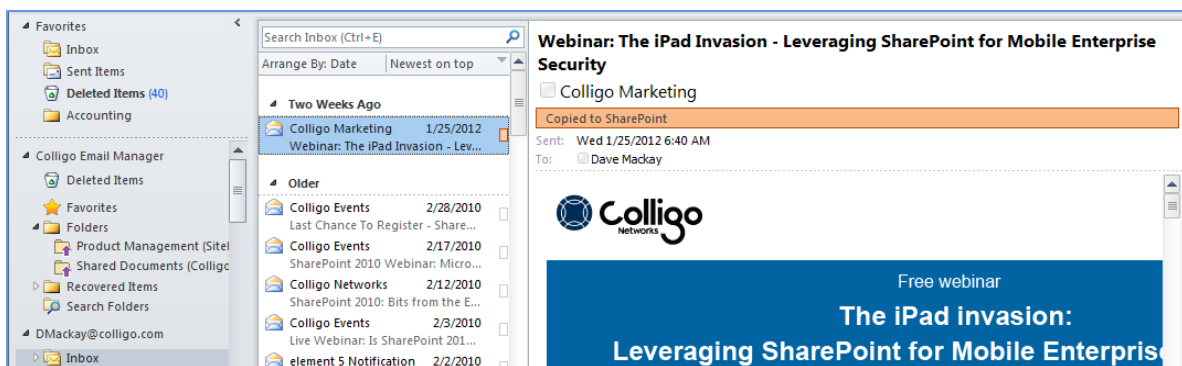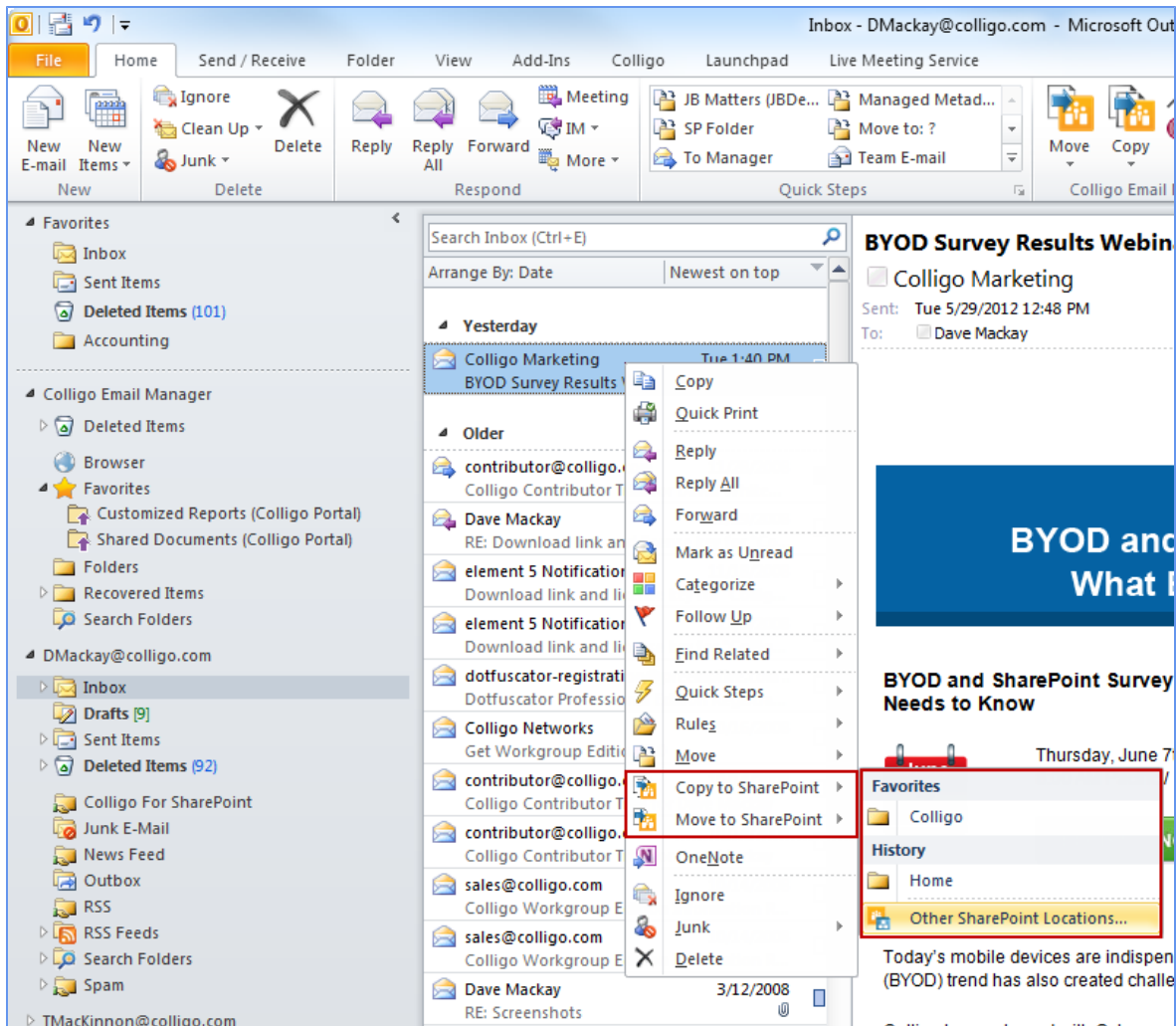

To enable or disable this setting, see Managing Settings.

Using Contextual Menu Options

To file emails to SharePoint using the contextual menu options:

1. Right-click an email and select **Copy to SharePoint** or **Move to SharePoint** from the contextual menu:

2. Choose a location from your **Favorites** or **History**, or choose **Other SharePoint Locations** to browse to any location in any of your sites.

   The **Edit Properties** dialog displays.

3. Choose your **Content Type** and enter the **Properties** as needed.
4. Click **OK** to complete the process.

   NOTE: If you have enabled the **Copied to SharePoint** setting, the marker displays in the header of the email and in the list view:
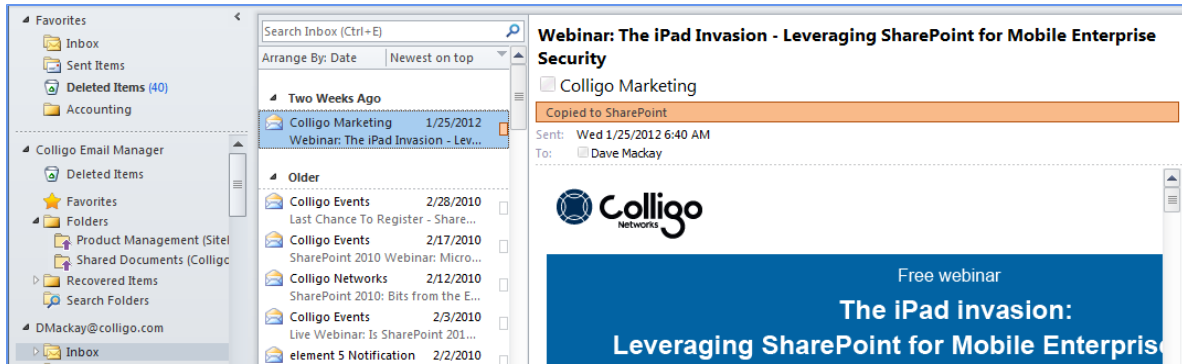
Moving or Copying Multiple Emails

To move or copy multiple emails:

1. Select your emails in Outlook (use **Ctrl + click** to select more than one email).

2. In Outlook 2010, click either the **Move** or **Copy** button in the **Colligo Email Manager** group on the **Home** tab; in Outlook 2007, click the **Move to SharePoint** or **Copy to SharePoint** button in the **Colligo Email Manager** toolbar.

3. Select the folder location that you are moving or copying the emails to.

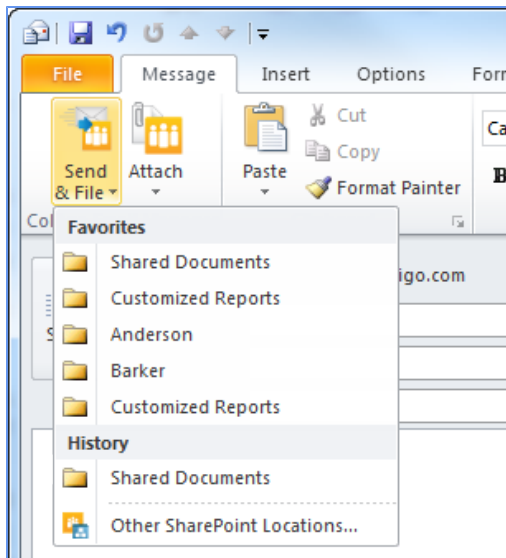   The **Edit Properties** dialog displays:
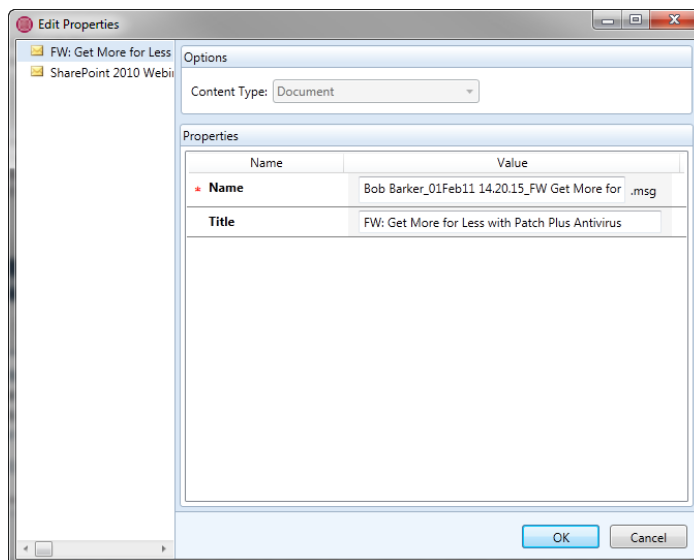
4. In the left pane, select the email and edit the **Content Type** and **Properties** as needed.

   See Using Managed Metadata for information about metadata fields.

   See Applying Metadata to Multiple Emails for information about applying metadata to multiple items.

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

   The emails are moved or copied to the selected folder.

Sending and Filing Emails

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

1. When your email is complete and ready to send, click the **Send & File** button that displays in the **Message** ribbon of a new email message.

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

2. Choose a location in your **Favorites** or **History** list, or choose **Other SharePoint locations** to see all your SharePoint sites.

   The **Edit Properties** dialog displays.

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

   See Using Managed Metadata for information about metadata fields.

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

   The email is sent to the SharePoint location.

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

Applying Metadata to Multiple Emails

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

To apply the same metadata to multiple emails:

1. Select your emails in Outlook (use **Ctrl + click** to select more than one email).
2. In Outlook 2010, click either the **Move** or **Copy** button in the **Colligo Email Manager** group on the

Home tab; in Outlook 2007, click the **Move to SharePoint** or **Copy to SharePoint** button in the **Colligo Email Manager** toolbar.

3. Select the folder location that you are moving or copying the emails to.

   The **Edit Properties** dialog displays.

4. Press the **Ctrl** key and click to select the emails in the left column that you want to apply the same metadata to.

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

See Using Managed Metadata for information about metadata fields.

5. Edit the **Content Type** and **Properties** as needed.

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

   The emails are moved or copied to the selected folder.

Using Managed Metadata

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

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

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

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

Using Typeahead

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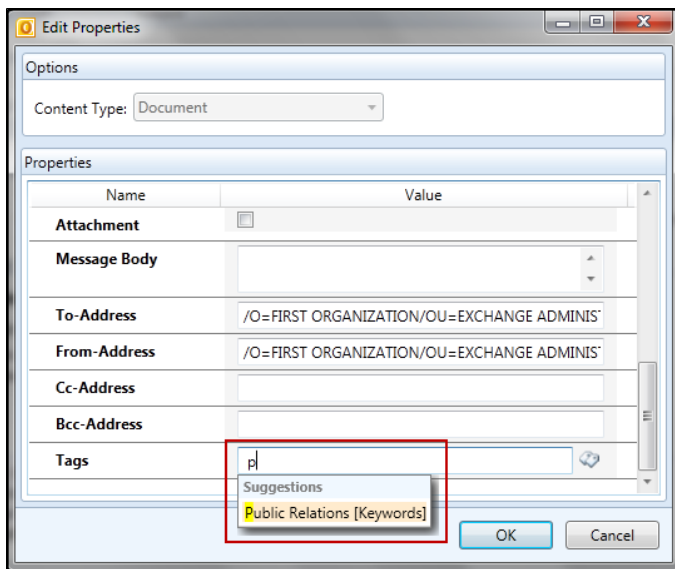
Using Person or Group Metadata

You can assign person or group metadata when filing emails.

Depending on how your SharePoint document library was configured, you may have the following options to:
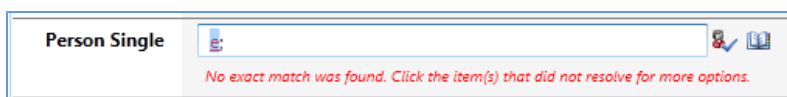
- enter multiple people and/or groups
- choose people only or people and groups
- choose from all users or a group
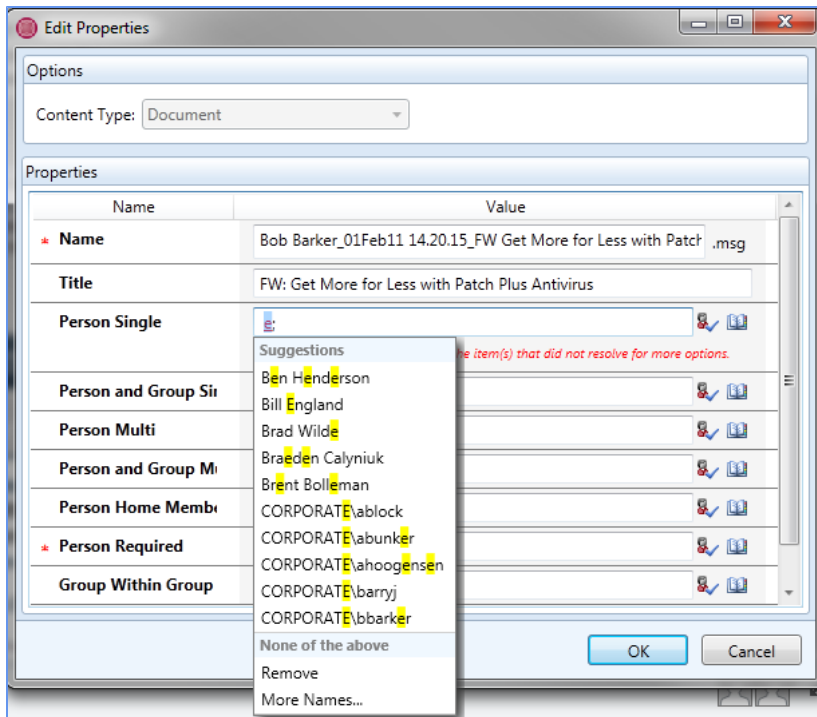
Validating a Person or Group Name

To validate a person or group name:

1. If you only know part of the name of a person or group, you can enter one or more letters in the field and click the validation icon .

   The following error message displays:

2. Click the item to display a drop-down menu of suggestions based on the letter(s) you entered:
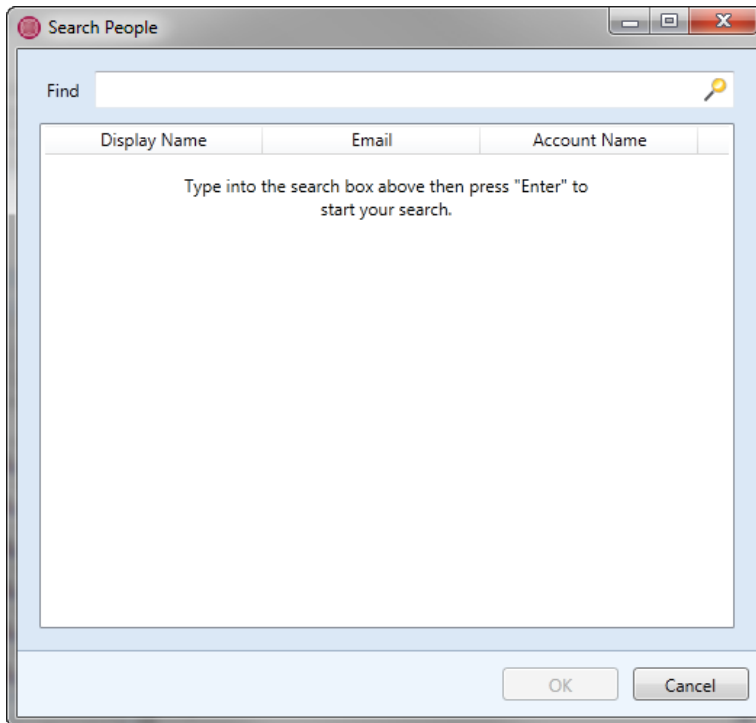
3. Select an item from the list to enter in the field, or enter new search letters.

Searching for a Person or Group Name

To search for a person or group name:

1. Click the address book icon to view the directory of your SharePoint people and groups. The **Search People** dialog displays:
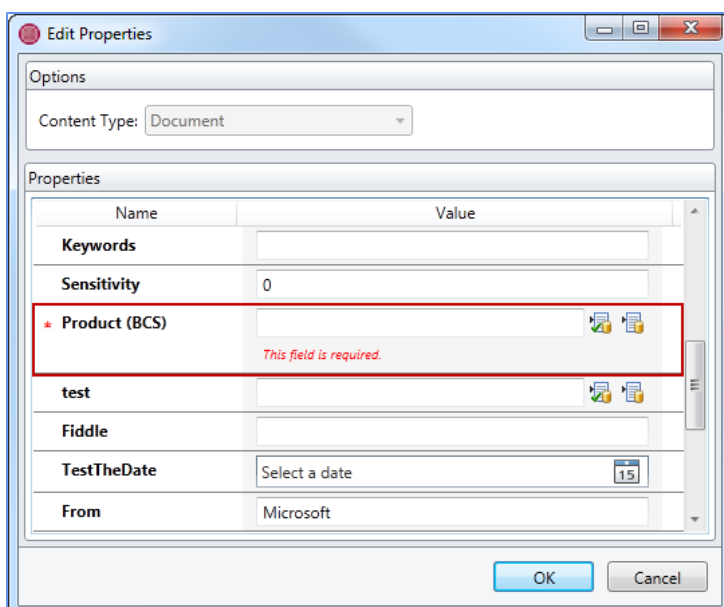
2. Click the search icon to display a complete list of all people and groups, or enter a name in the **Find** field and press **Enter** to search.
3. Select the person or group you want to add to the field and click **OK**.

Using BCS Metadata

BCS, or Business Connectivity Services, allows Colligo Email Manager to connect to alternate databases and taxonomies.

These fields display in the **Edit Properties** dialog in a similar way to Managed Metadata fields:

4/12/2013

Copyright 2013 Colligo Networks, Inc. All rights reserved.

Page 29 of 52

Not to be reproduced without permission. Learn more at www.colligo.com.

You can add a term in one of two ways:

- Type a term in the field and click the first icon to check if the external item exists.

  NOTE: you must type the term exactly for it to be validated. For example, if you enter the term "tong" and the item name is "tongs" it will not validate.
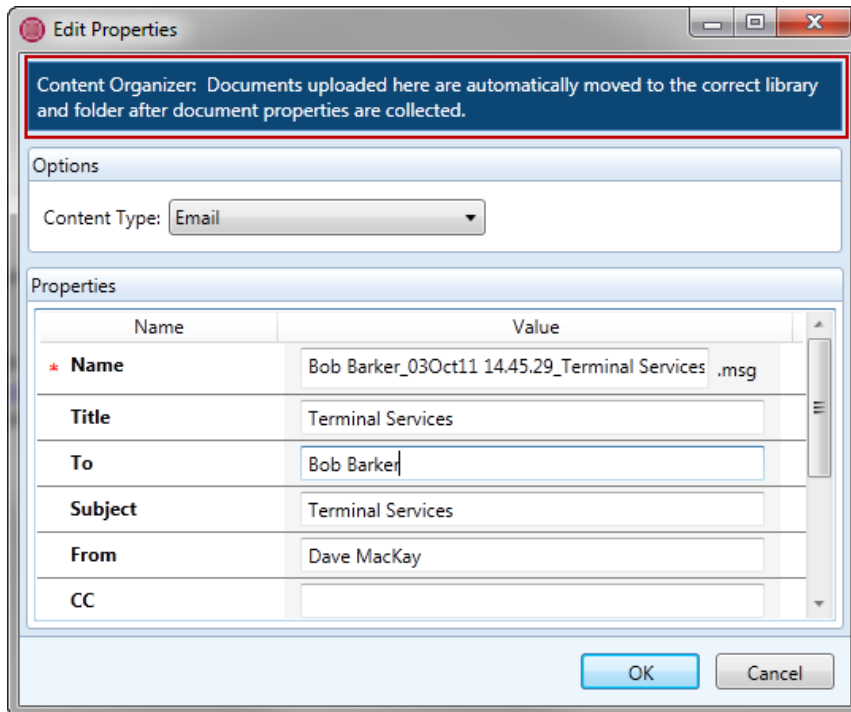
OR

- Click the second icon to display the **Choose List Item** dialog. Select an item and click **OK** to add it to the field:
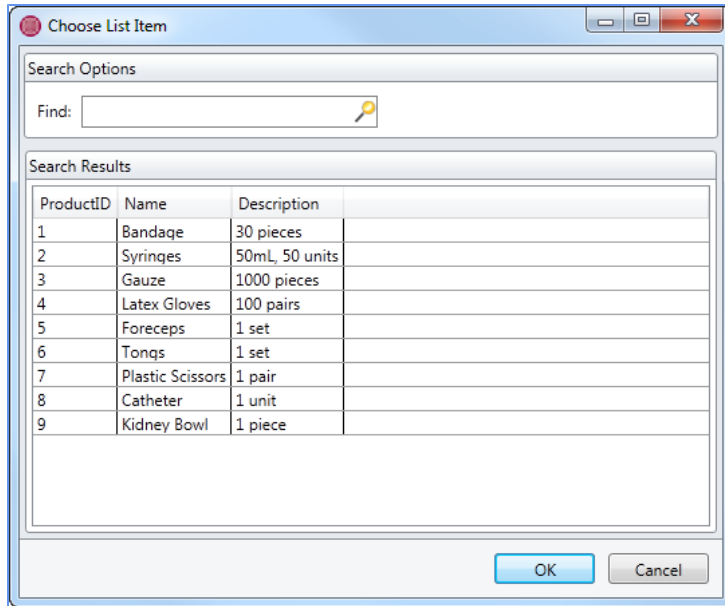

Filing Emails to a Drop-Off Library

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

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

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

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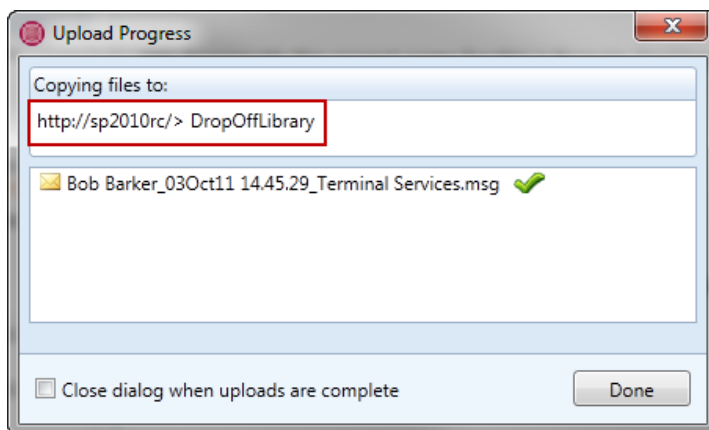

NOTE: If you file an email to a location that is a destination point of the drop-off library, Email Manager overrides the action and re-routes the email to the drop-off library itself, rather than the destination. The reason for this is to ensure that the content is routed according to how the Content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

Managing Attachments in Emails

When you are sending an email, you have the option of inserting a link to a document location in SharePoint, or inserting a SharePoint item as an attachment.

1. When you want to attach a document or insert a link, click the **Attach** button that displays in the **Message** ribbon of a new email message.

   A list of your SharePoint **Favorites** and your most recently used SharePoint folders (**History**) displays:
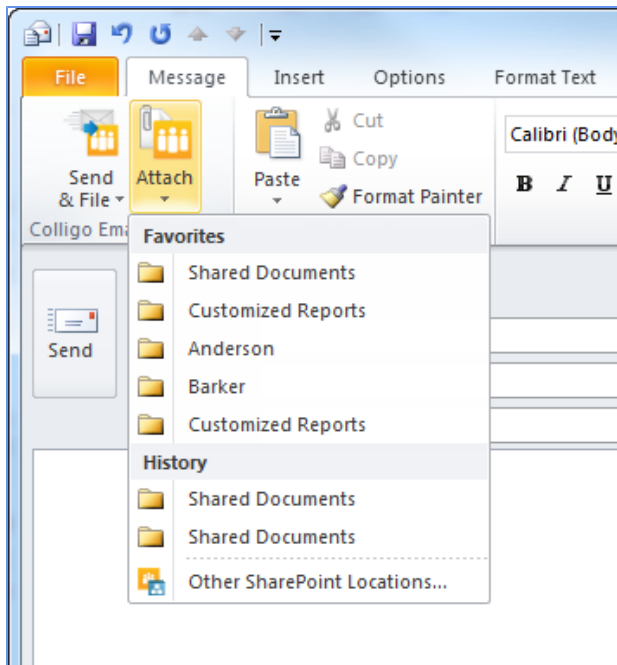
2. Choose a location in your **Favorites** or **History** list, or choose **Other SharePoint locations** to see all your SharePoint sites.

   The **Insert Attachment From SharePoint** dialog displays:
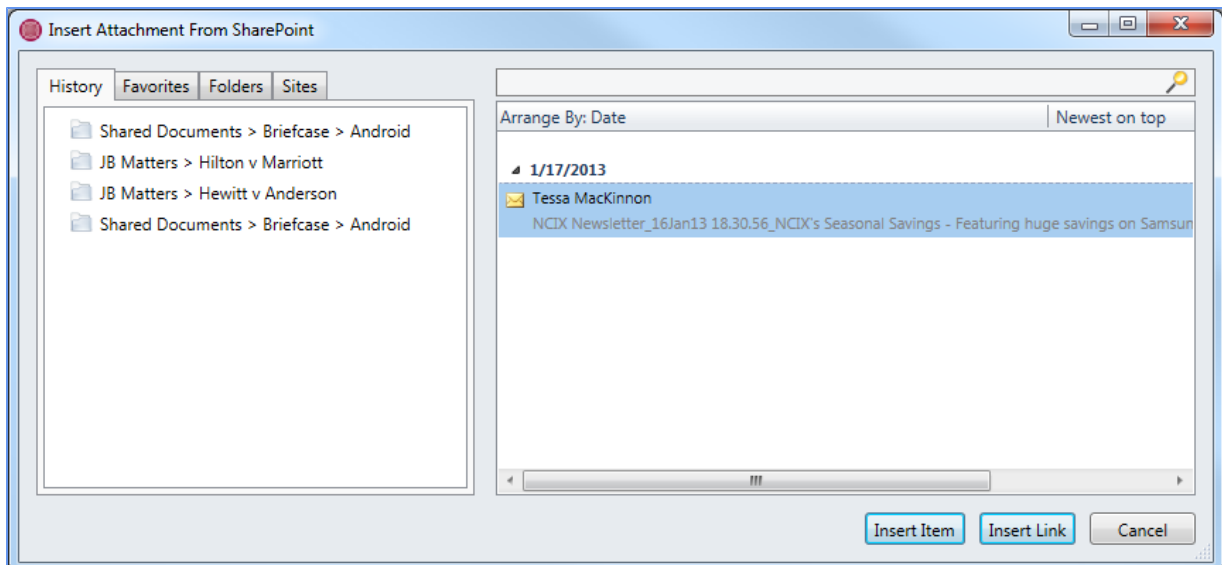
3. You can find an item by accessing your **History** and **Favorite** locations by clicking on the appropriate tab, or see all of your SharePoint locations on the **Sites** tab. You can also use the Search field to narrow the list.

NOTE: The number of items that display in the results pane when you select a folder location or when you use the search feature, are set in the **SharePoint Query Options** field in the **Search Options** tab (see Managing Search Options).

4. Browse through either the search results or your folders and subfolders until you find the item you are looking for. You can use the **Arrange By** toggle to arrange items by the **Date** the item was created or by who created the item (**From**).

5. Choose one of the following options:
   a. **Insert Item**: choose this option if you want to insert the item as an attachment
   b. **Insert Link**: choose this option if you want to insert a link to the item's location in SharePoint

6. Click **Send** or **Send & File**.

Copying an Outlook Folder to SharePoint

You can copy a folder from Outlook to a SharePoint location using Email Manager.
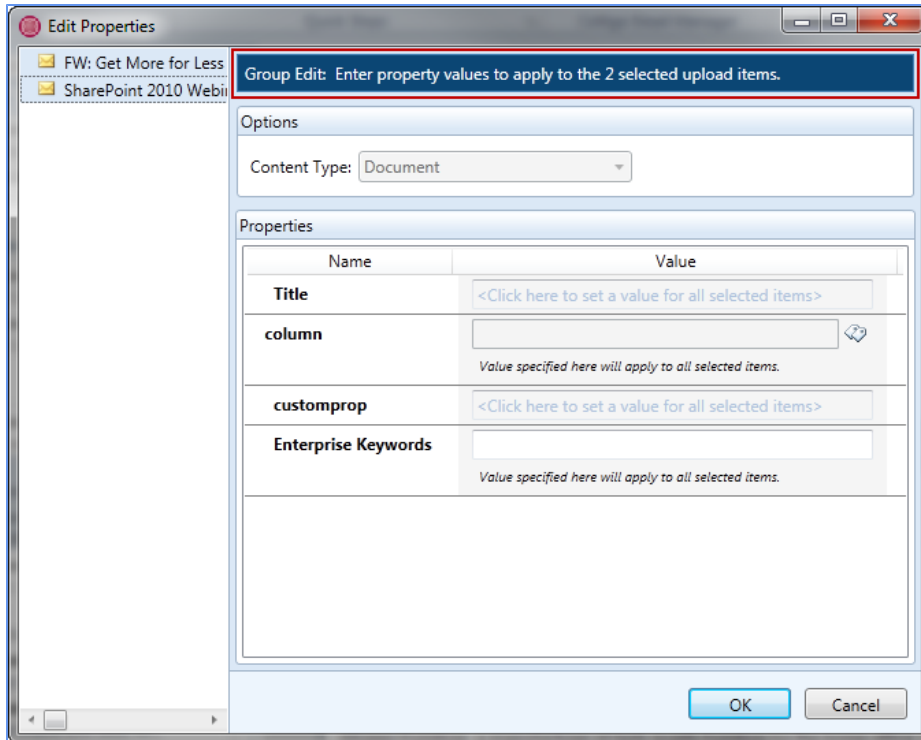
NOTE: you can only copy folders to SharePoint; moving a folder is not available.

1. Right-click on the folder you want to copy to SharePoint and select **Copy to SharePoint** from the contextual menu:
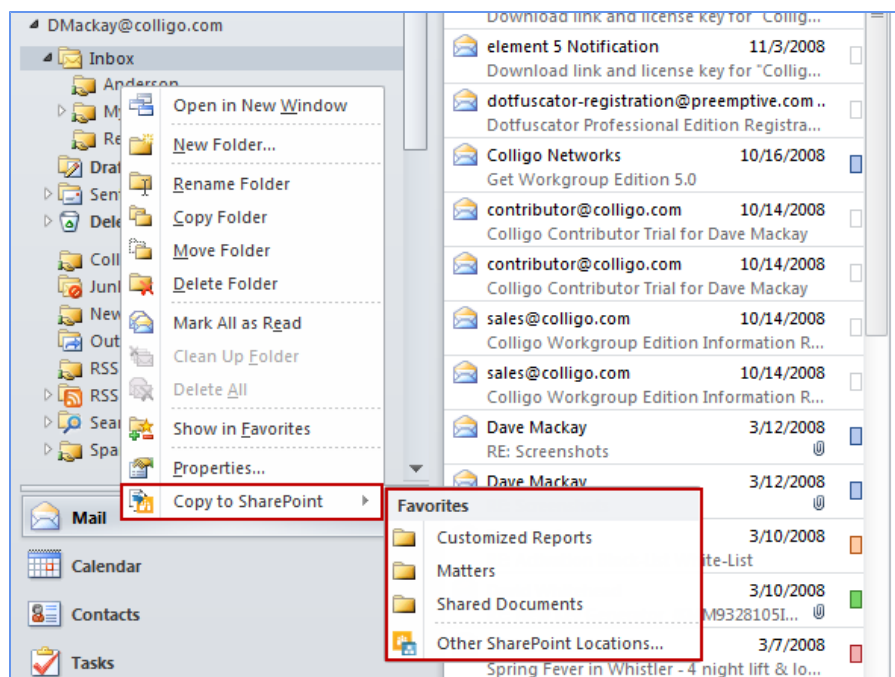
2. Choose a location in your **Favorites** or **History** list, or choose **Other SharePoint locations** to see all your SharePoint sites.

   The **Edit Properties** dialog displays:

For information about applying metadata to multiple emails, see **Applying Metadata to Multiple Emails**.
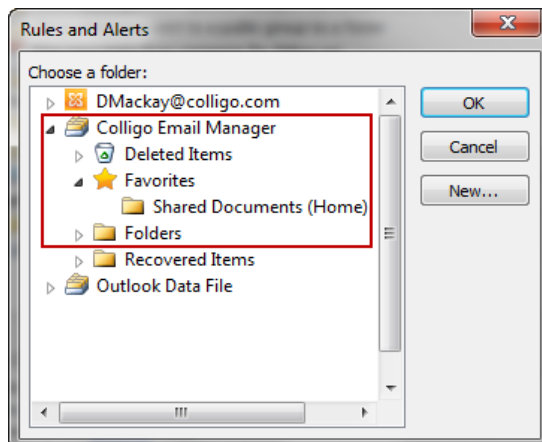
Using Outlook Rules to File Emails

To use an Outlook rule to file an email:

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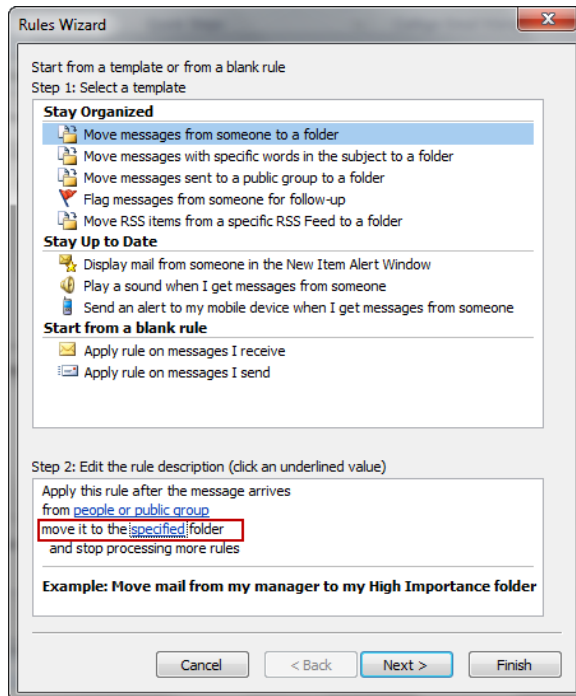
The **Rules and Alerts** dialog displays:

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

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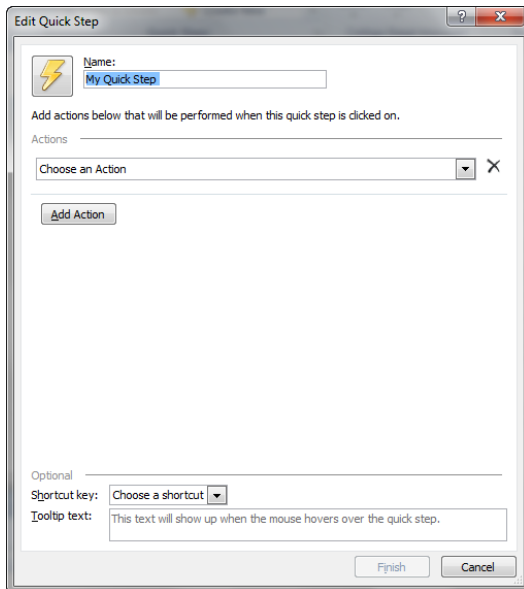
Using Outlook Quick Steps to File Emails

To use Quick Steps to file emails:

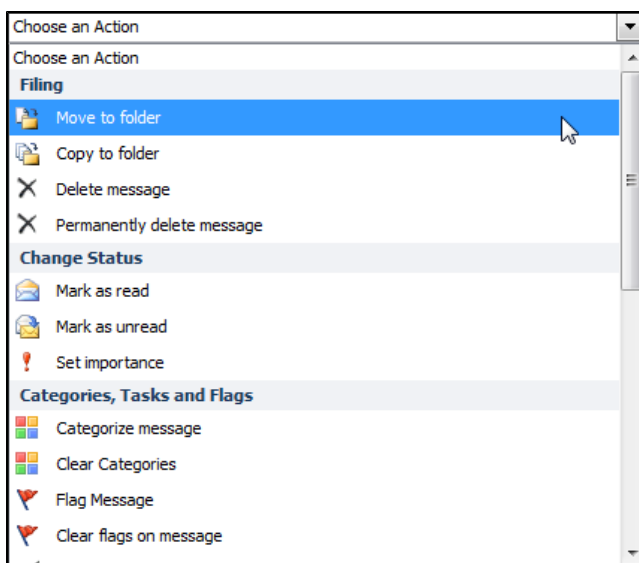1. In the Quick Steps group on the Home ribbon, click **Create New**:
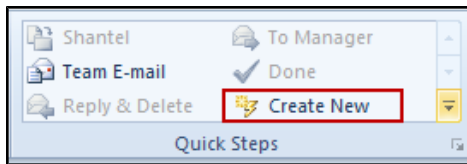

The **Edit Quick Step** dialog displays:

2. In the **Name** field, enter a name for the Quick Step.

3. Under the **Choose an Action** drop-down menu, in the **Filing** group, choose **Move to folder** or **Copy to folder** as preferred:

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

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

   The **Select Folder** dialog displays:
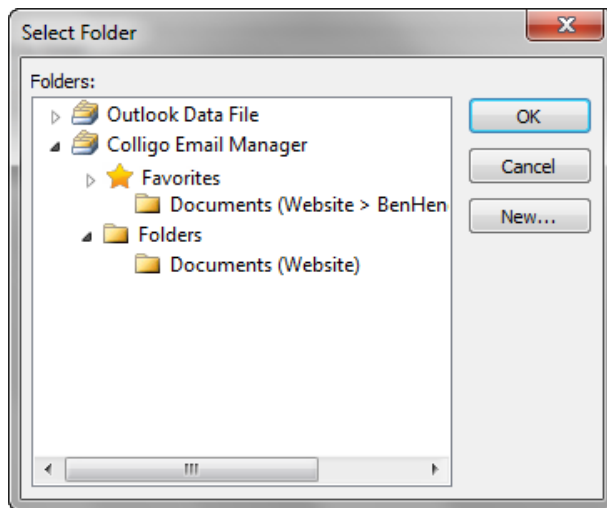
5. Choose a folder from the **Colligo Email Manager** group and click **OK**.

6. Click **Finish**.

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

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

CONFIGURING LAUNCHPAD

Launchpad is a ribbon in Outlook where you can create groups that contain buttons linking to your most frequently used web pages and web applications for quick access from within Outlook. Once you have buttons you can choose to add related items underneath it, as shown in the below image:
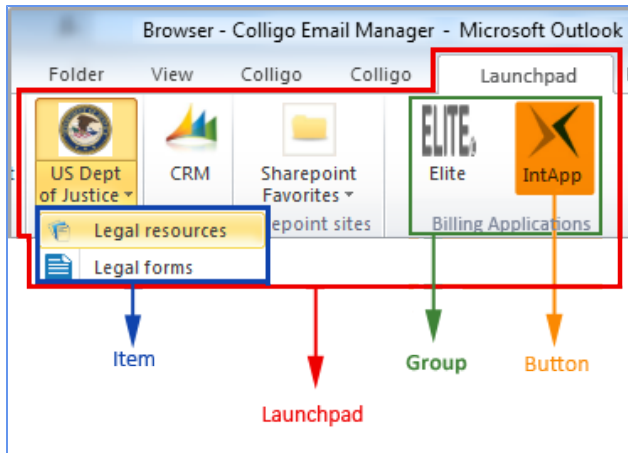
NOTE: Launchpad is not available in Outlook 2007.

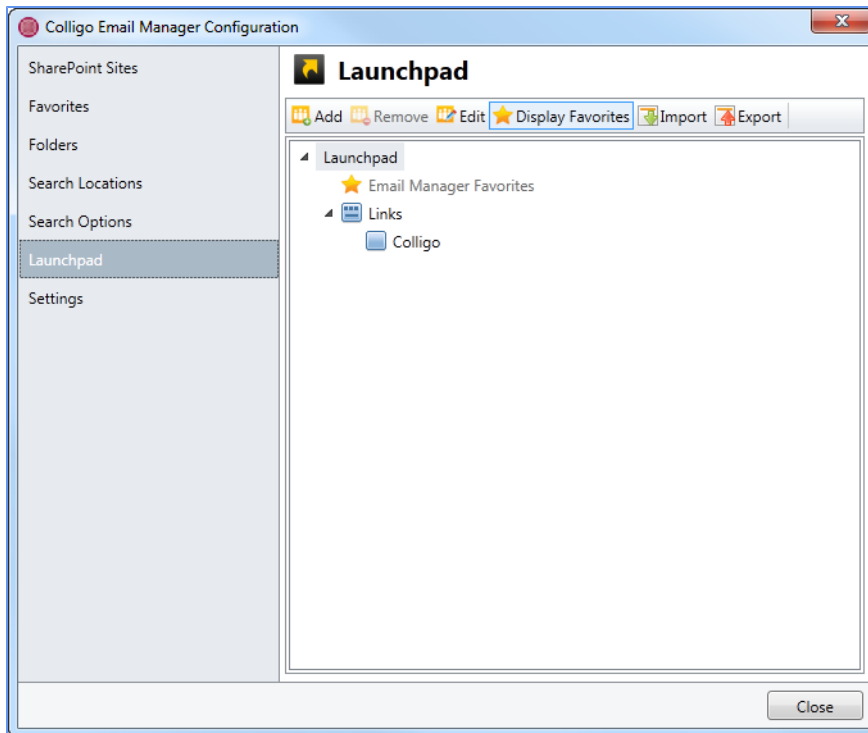To configure the Launchpad ribbon:

1. In the **Colligo Email Manager** group on the **Home** tab, click the **Colligo** drop-down arrow and select **Configure**.
2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Launchpad**.

   OR

   From the **Launchpad** ribbon, click the **Launchpad** icon to display the configuration dialog:
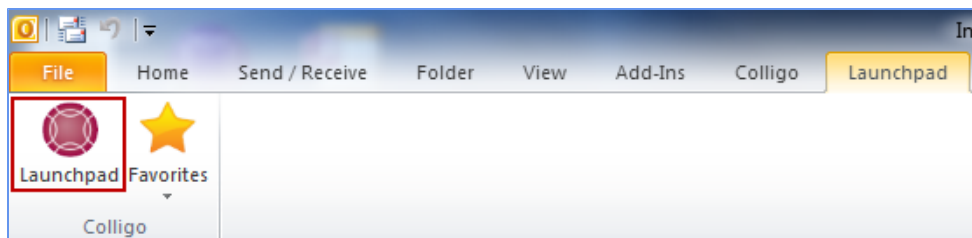
The **Launchpad** dialog displays:

Editing the Launchpad Tab

To edit the name of the Launchpad tab:

1. Select **Launchpad** and click **Edit**.

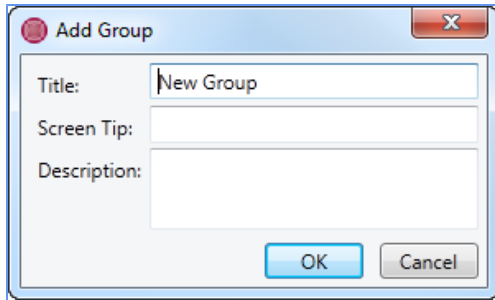   The **Edit Launchpad** dialog displays:
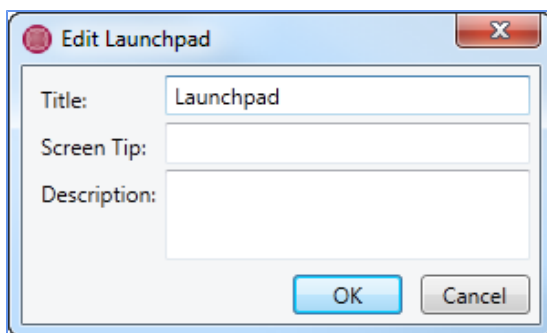
2. Edit the **Title** field.
3. Enter **Screen Tip** text and a **Description** if needed.
4. Click **OK**.
5. Restart Outlook for the change to take effect.

Adding a Group

To create a group in Launchpad:

1. Select Launchpad and click **Add**.

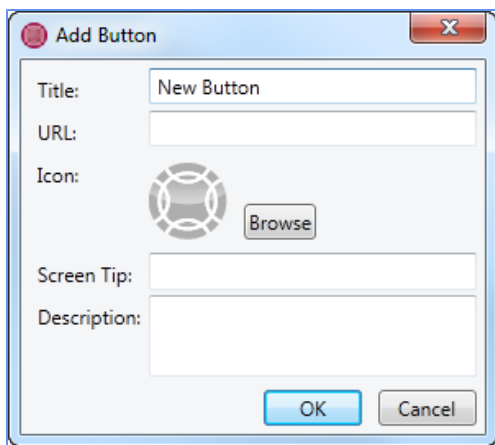   The **Add Group** dialog displays:

2. In the **Title** field, enter the name of the group.
3. Enter **Screen Tip** text and a **Description** if needed.
4. Click **OK**.
5. Restart Outlook for the change to take effect.

Adding a Button to a Group

Once you have added a group, you can add a button to it:

1. Select the group that you want to add the button to and click **Add**.

   The **Add Button** dialog displays:

2. In the **Title** field, enter the name of the button.
3. In the **URL** field, enter the address of the web page or web application. After you enter the URL and click away from the field, the icon associated with the URL displays in the **Icon** space. If you want to change the icon, click **Browse** to choose your preferred icon. If you click **Clear**, the default icon above is used.
4. Enter **Screen Tip** text and a **Description** if needed.
5. Click **OK**.
6. Restart Outlook for the change to take effect.

Adding an Item to a Button

Once you have added a button, you can add one or more items to it:

1. Select the button that you want to add the item to and click **Add**.
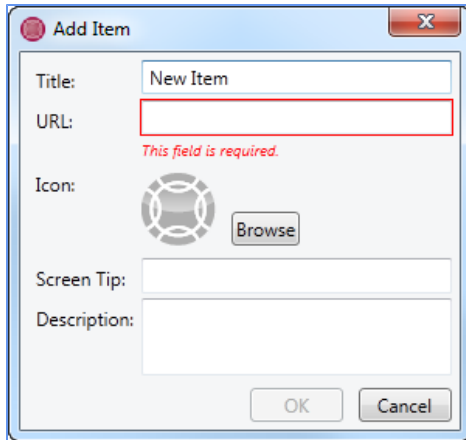
   The **Add Item** dialog displays:

2. In the **Title** field, enter the name of the item.
3. In the **URL** field, enter the address of the web page or web application. After you enter the URL and click away from the field, the icon associated with the URL displays in the **Icon** space. If you want to change the icon, click **Browse** to choose your preferred icon. If you click **Clear**, the default icon above is used.

   NOTE: this is a required field. You cannot create an item without a URL.

1. Enter **Screen Tip** text and a **Description** if needed.
2. Click **OK**.
3. Restart Outlook for the change to take effect.

Displaying Email Manager Favorites

If you have added SharePoint locations to your Email Manager Favorites list, you can also choose to display them in the Launchpad ribbon.

1. Click the **Display Favorites** button in the Launchpad dialog:
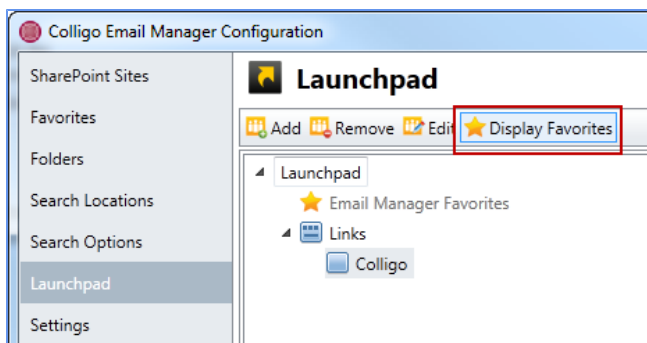
2. Restart Outlook for the change to take effect.

   NOTE: This button is a toggle. To remove the Favorites group from the Launchpad ribbon, click the button again and restart Outlook.

   The SharePoint locations from your Favorites list do not display in the Launchpad dialog; they display in the Launchpad ribbon in a group called Favorites:
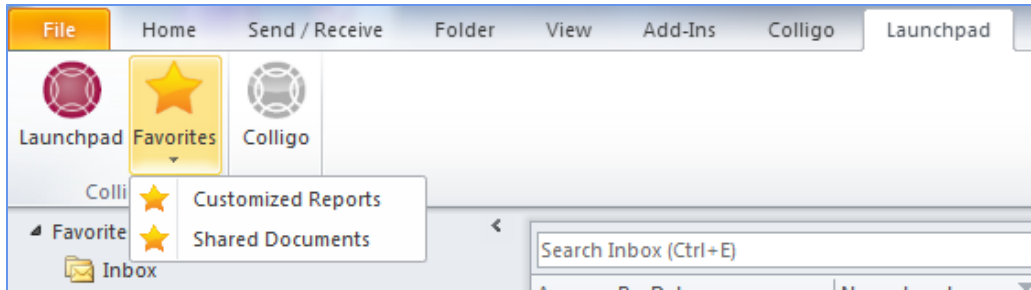
Viewing Launchpad URLs

After you have configured your groups, buttons, and items, they display on the **Launchpad** tab in Outlook:
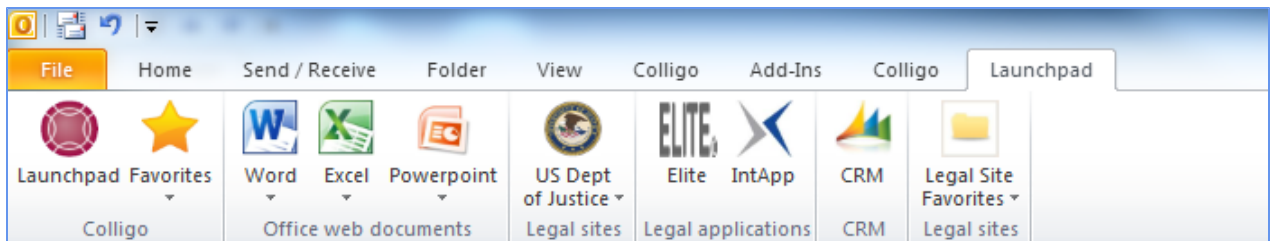
Click on any button or item to display its associated URL. If you move to another tab in Outlook, you can click the **Browser** icon in the folder tree to go back to the last page you viewed.

You can use the refresh icon and the browser buttons in the navigation bar to navigate through the web page.
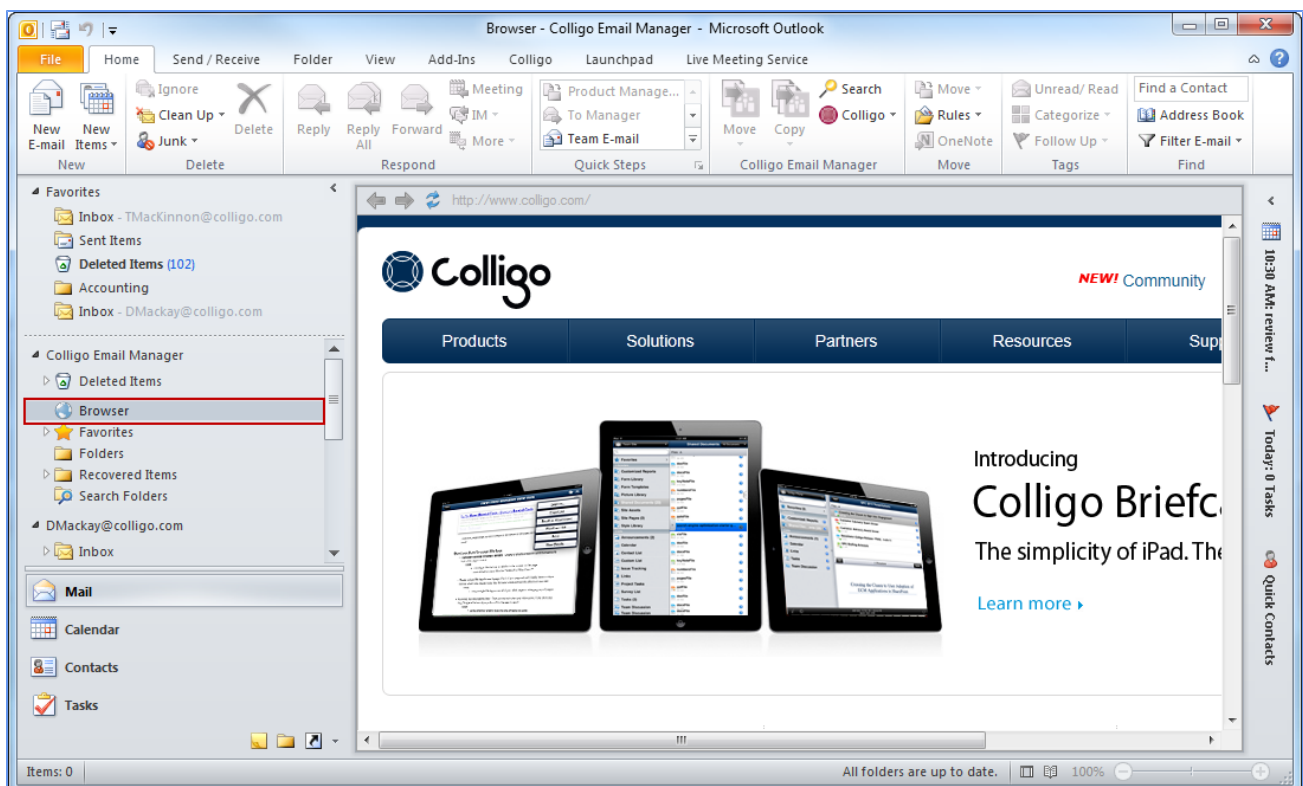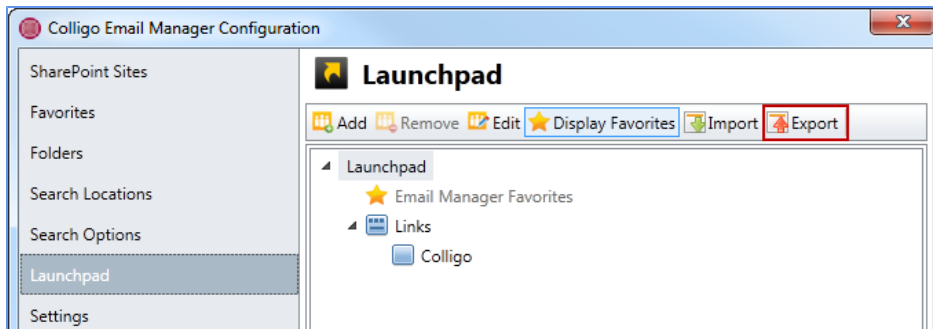
Importing and Exporting Launchpad Settings

You can export your Launchpad settings and save it as a .ribbon file on your computer. You can then import this file to another installation of Email Manager.

NOTE: The Email Manager Favorites list is not exported.

To export a Launchpad configuration file:

1. In the Launchpad configuration dialog, click the **Export** button.

A Windows **Save As** dialog displays.
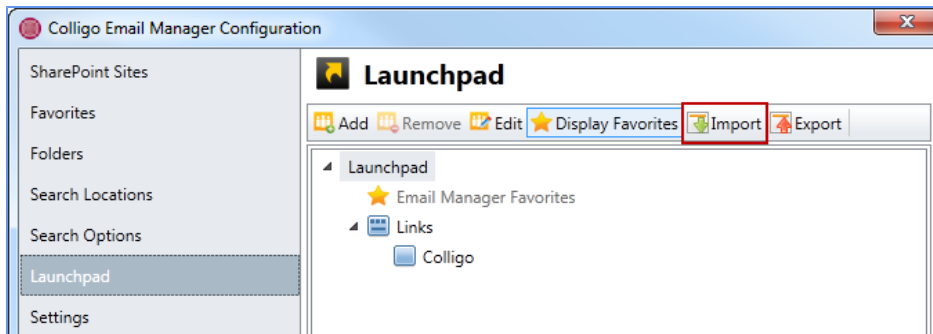
2. Enter a name for the file and browse to the location where you want to save it.
3. Click **Save**.

To import a Launchpad configuration file:

1. In the Launchpad configuration dialog, click the **Import** button.

A Windows **Open** dialog displays.

2. Browse to the location of the saved .ribbon file.
3. Click Open. The Launchpad groups, buttons, and items display in the dialog.

SEARCHING SHAREPOINT AND OUTLOOK

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

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

Enabling Search Capability

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

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


Searching

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

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

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

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

After you have entered a search term and started the search, you can look at the progress of the search by clicking the arrow at the bottom of the search pane:
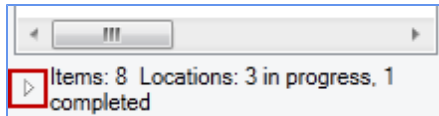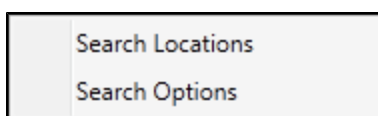
The search locations display. You can click **Cancel** to remove results from a particular site from the search.
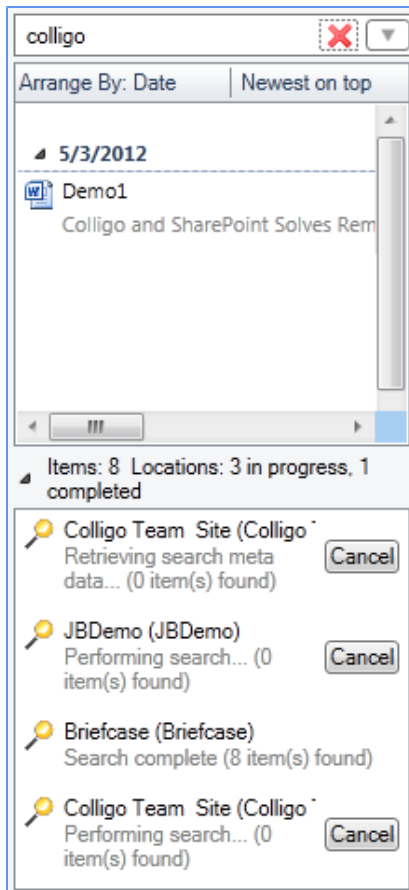
Defining Search Locations and Terms

To define your search locations and parameters:

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

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

Any results display under the search field:
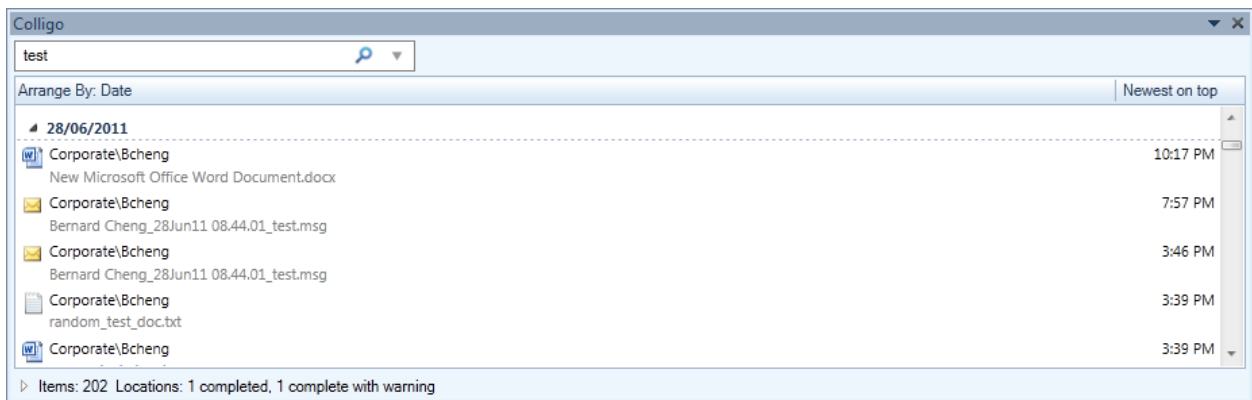
NOTE: If you are not getting any search results it is likely because the search capability for the Share-Point site has not been configured. Please contact your systems administrator.

Viewing Search Results

You can arrange your search results by item Date or Author (From). To toggle between these views, click on the **Arrange By** field in the results pane and select **Date** or **From**:
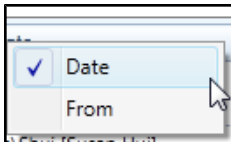
You can also sort the results by viewing the newest item on top or the oldest item on top. To toggle between these views, click the top-right corner of the search results to get the view you want:
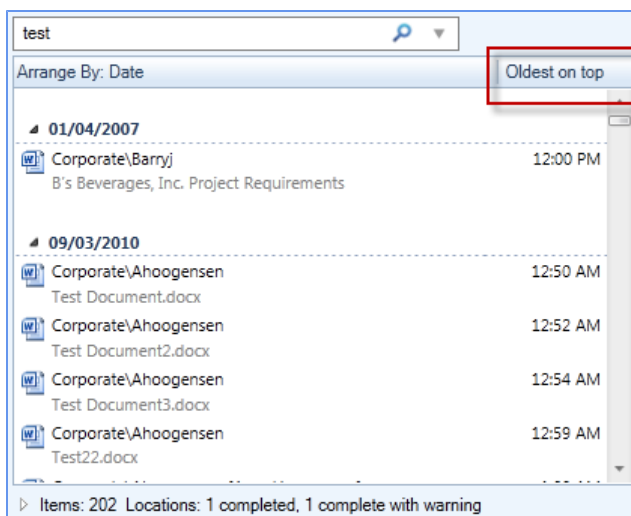
Additionally,if an email with an attachment is returned in your search results, the paperclip icon displays to indicate the attachment:
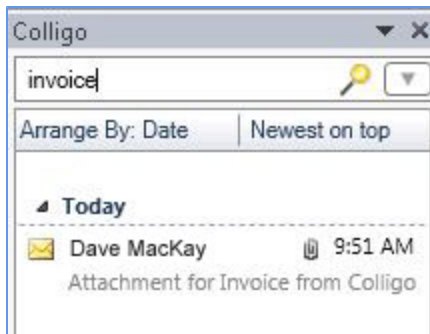
Managing Search Results

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

Viewing an Item

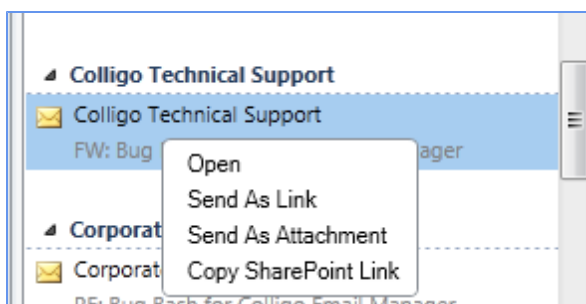To view an item in your search results, either double-click it to open and view, or right-click and select **Open** from the contextual menu:

Emailing a Link to an Item

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

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

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

Sending Item as an Attachment

To send the item as an attachment, right-click the item and select **Send As Attachment** from the contextual menu. This launches a new email with the search result item in the **Attached** field.

Creating a Link to an Item

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

Managing Search Locations

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

Adding a Search Location

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

1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.

2. In the site list, click the site you want to add to your search locations and click the **Add Search Location** icon: .

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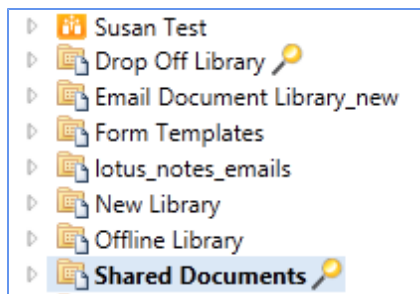
OR

1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.

2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Search Locations**.

   The **Search Locations** dialog displays:
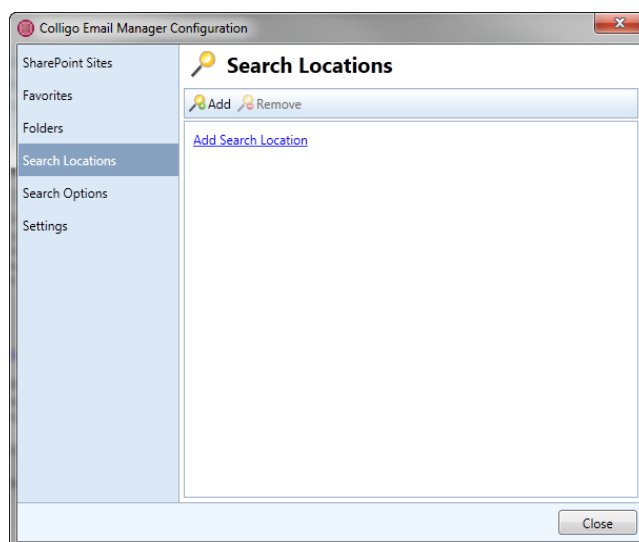
3. Click the **Add Search Location** link or the **Add** icon.

The **Add Search Location** dialog displays:

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

The site is now included in your search locations list.

Removing a Search Location

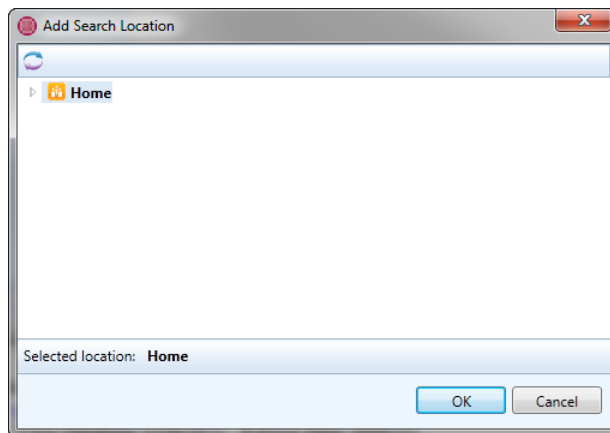To remove a site from your search locations list:

1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Search Locations**.
3. In the site list, click the site you want to remove and click **Remove**. The site no longer displays in the list.

Managing Search Options

The **Search Options** area of Email Manager lets you define your search parameters. To define the search options:
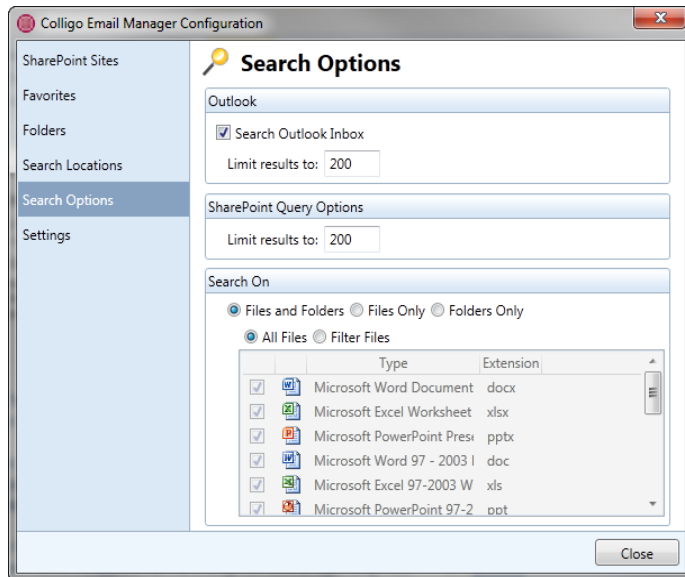
1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 2013, or, in the **Colligo** Toolbar in Outlook 2007, click the **Colligo** drop-down arrow and select **Configure**.
2. In the left-hand pane of the **Colligo Email Manager Configuration** dialog, select **Search Options**.

The **Search Options** dialog displays.

3. In the **Outlook** section of the dialog, check the **Search Outlook Inbox** option if you want to include your inbox content in your search. In the **Limit results to** field, enter the number of results you want returned.

4. In the **SharePoint Query Options** section, enter the results number in the **Limit Results to** field.

5. In the **Search On** section, choose your parameters:
   a. Choose from one of the following:
      a. **Files and Folders**
      b. **Files Only**
      c. **Folders Only**
   b. If you choose either the **Files and Folders** or **Files Only** option, you can further determine the file types you want to search by choosing one of the following:
      a. **All Files**
      b. **Filter Files**
   c. If you choose **Filter Files** you can further define the type of files you are searching by checking the boxes of the file types in the list.

Custom Search Folders

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

MANAGING RECOVERED ITEMS

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

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

UNINSTALLING COLLIGO EMAIL MANAGER

To uninstall Colligo Email Manager:

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