# Colligo Email Manager 6.0

**Connected Mode - User Guide** 



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# 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 Share-Point 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 <a href="mailto:support@colligo.com">support@colligo.com</a>.

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:

Enter License Key	x
Please enter your 25-digit license	e key (include dashes):
	OK Cancel

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:

🔘 Colligo Email Manager Configurati	ion 🗾
SharePoint Sites	🔡 SharePoint Sites
Favorites	🔀 Add 🔀 Remove 🤁 Edit 📿 😭 🗅 🔎
Folders	Add SharePoint Site
Search Locations	
Search Options	
Launchpad	
Settings	
	Close

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

Add SharePoint Site	X
URL:	
Examples:	http://server/workspace
	https://secureserver/workspace
Server Authentication	
Authentication Type:	Auto-detect 🔹
	Auto-detect
Use default cre	Windows Classic
Use the follow	Windows Claim-based
User name:	Form-Based ADFS 2.0
	Office365
Password:	Office365 by Prompt
Domain:	CORPORATE
	OK Cancel

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

Colligo Email Manager Configuration		
SharePoint Sites	🔛 SharePoint Sites	
Favorites	🔀 Add 🔀 Remove 🤁 Edit 📿 😭 🗀 🔎	
Folders	Product Management	
Search Locations	▲ M JBDemo ▶ m JB Matters	
Search Options	Matters	
Launchpad	B Order Forms     Gran Shared Documents	
Settings	-	
	Close	

#### 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:

 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:** 

👌 🕶 🔊 ·	🕶 🖃 🖷 👻 Page 🕶 Safe	ety 🔻 Tools 👻 🌘	
	Connec	ct to Colligo Email	Manager
			gs & otes
	Search this site	P	0
s post to your	news feed and work acros	s different sites.	
	DOCID-10-942	New	
	DOCID-10-951	New	
	DOCID-10-951 DOCID-10-1055	New New	

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

**Internet Explorer 8**:



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

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

Colligo Email Man	ager: Connect to Ou	tlook	
http://sp2	rePoint location to C 010rc.corporate.loc Items.aspx	)utlook: c <mark>al/DropOffLibrary/</mark>	
User name:			
Password:			
Domain:			
		Continue	Cancel

 Enter your login information and click Continue. The following screen displays.

Colligo Email Manager: Connect to Outlook			
Connect this SharePoint location to Outlook: http://vs-sp2010/PM/Shared%20Documen AllItems.aspx?RootFolder=%2FPM%2FShar 20Documents%2F6%2E0%2FUser%20Docu	red%		
Add as Favorite in Email Manager A Favorite is a location you frequently use to file email. Selecting this option will add the SharePoint location to Outlook as shown here. Any sub-folders are not visible within Favorites.	Colligo Email Manager		
Add as Folder in Email Manager A folder is used to represent a SharePoint document library or folder. Selecting this option will add the SharePoint location to Outlook as shown here. All SharePoint sub- folders within this library or folder will also be visible in Outlook.	Colligo Email Manager		

- 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:

File Edit View Favorites Tools Help			Menu bar	
Site Actions 👻 🃝 Browse Page		•	Favorites bar	
			Command bar	
	Product Management → Home	✓	Status bar	
Collaboration Made Easy."	Colligo Intranet site for the Product Management de		Snagit	
Ũ		✓	Lock the toolbars	
Home AdminTest Document Workspace Records Demo			Show tabs on a separate row	

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:

Colligo Email Manager Configuration				
SharePoint Sites	强 SharePoint Sites			
Favorites	🔀 Add 🔀 Remove 🖽 Edit 📿 😭 🗅 🔎			
Folders	Product Management			
Search Locations	✓ BDemo ▷ B Matters			
Search Options	Matters			
Launchpad	<ul> <li>Order Forms</li> <li>Ghared Documents 2</li> </ul>			
Settings				

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:

Colligo Email Manager	Configuration 💌
SharePoint Sites	🔶 Favorites
Favorites	★Add 1 kg Remove
Folders	Add Favorite
Search Locations	
Search Options	
Settings	
	Close

Click the Add Favorite link or the Add icon.
 The Add Favorite dialog displays:

Add Favorite	<b>X</b>
Q	
🕨 👪 Home	
Selected location:	
	OK Cancel

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

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

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

<ul> <li>Colligo Email Manager</li> <li>Deleted Items</li> </ul>					
🕘 Browser					
<ul> <li>Favorites</li> <li>Customized Reports (portal.colligo.com)</li> <li>Shared Documents (portal.colligo.com)</li> </ul>					
Folders					
Dia Recovered Items					
📮 Search Folders					

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

<ul> <li>Favorites</li> <li>Inbox (1)</li> <li>Sent Items</li> <li>Deleted Items (222)</li> </ul>		Lil	d Documents/Forms/Alltems.aspx prary Tools ents Library	_	_	Tessa Mac	Kinnon <del>-</del>
Colligo Email Manager  Deleted Items  Browser	Share a documen		Documents > All Document am by adding it to this document lii as Information Systems Dem		Search this site	ی ا Like	It Tags & Notes
✓ ★ Favorites Cartomized Reports (portal.colligo.com) Cartomized Documents (portal.colligo.com)	Libraries Site Pages	Туре	Name Briefings	Modified 2/2/2012 9:02 AM	Modified By	Description	Approval Sta Approved
i⊇ Folders ▷ ⊇ Recovered Items Go Search Folders	Shared Documents		Photos SPC 2011 Presentations	3/18/2013 10:40 AM 9/30/2011 12:18 PM	Tessa MacKinnon CORPORATE\tdyck		Pending Approved
<ul> <li>▲ ABunker@colligo.com</li> <li>▷ Inbox (14)</li> <li>▷ Drafts (4)</li> </ul>	Calendar Tasks	9) 10)	acme quote 2003 ACME Quote-Word 2003	8/15/2012 3:27 PM 2/14/2013 3:30 PM	CORPORATE\tdyck	For publishing New doc	Approved Draft
Sent Items       Image: Operation of the sent Items       I	Discussions Team Discussion		ACME Quote-Word 2007 arma	10/25/2012 2:14 PM 10/16/2012 9:36 AM	Tessa MacKinnon Tessa MacKinnon	for reviewing edits	Approved Approved
🖂 Mail	Recycle Bin		brandenburger-tor-berlin_344	3/18/2013 10:28 AM	Tessa MacKinnon	Photo for review - do not publish	Draft
Secontacts	All Site Content	1	Briefcase_Release Notes_3.0 (01)	3/18/2013 10:36 AM	Tessa MacKinnon	Added SP 2013	Draft
Tasks			Briefcase_Release Notes_3.0	8/14/2012 9:55 AM	Tessa MacKinnon	For publishing	Approved

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

Remove this Folder	
Add as Favorite	N
Refresh	h

## **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:

ſ	Colligo Email Manager Configuration								
	SharePoint Sites	强 SharePoint Sites							
	Favorites	🔀 Add 🖽 Remove 😳 Edit 📿 😭 🎦 🔎							
	Folders	Product Management							
	Search Locations	<ul> <li>IBDemo</li> <li>IB Matters</li> </ul>							
ŀ	Search Options	Matters							
	Launchpad	<ul> <li>Order Forms</li> <li>Shared Documents</li> </ul>							
	Settings								

#### 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:

onfiguration	J
🦲 Folders	
Ndd Nemove	
Add Folder	
Close	
	Folders  Constant Con

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

The Add Folder dialog displays:

Add Folder		×
0		
🕑 👸 Home		
Selected location: Home		
	OK Ca	ncel

*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.

 Browse to the folder you want to add to your Folders list and click OK. Any folders added display under Folders in the Colligo Email Manager list:



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



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

#### **Removing a Folder from Folders List**

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 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:

Colligo Email Manager Configurat	Colligo Email Manager Configuration							
SharePoint Sites	🛄 Settings							
Favorites	History and Favorite Limits							
Folders	Number of History items:	10						
Search Locations								
Search Options	Number of Favorite items:	10						
Launchpad								
Settings	Drag-and-Drop Behavior	Send-and-File Behavior						
L	Copy to SharePoint	Copy to SharePoint						
	Move to SharePoint	Move to SharePoint						
	Mark Copied Emails with Label and Color							
	Enabled Label: Copied to SharePo	int 🔳 🗸						
	Disabled							
	Logging							
	Log level: Normal 🔹							
	Log file: Open log file location							
		]						
		Close						

- 3. In the **History and Favorites Limits** section, enter the maximum number of items you want to display in the following lists:
  - 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 <u>Managing Settings</u>.

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:

O Edit Properties		x						
Options								
Content Type: Document *								
Properties								
Name	Value	*						
* Name	Colligo Networks_01Jun11 06.40.46_Webinar Tc .msg							
Title	Webinar Tomorrow: Unleashing SharePoint 2010 for R	H						
То	Dave Mackay							
From	Colligo Networks	_						
Subject	Webinar Tomorrow: Unleashing SharePoint 2010 for R							
Bcc		_						
Cc		_						
EmIDate	Select a date	*						
	OK	el						

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

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

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

**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:

0 📑 🤊 呈			In	box - D	Mackay@colligo.com - Microsoft Outlook
File Hor	ne Send / Rece	ive	Folder View Add-Ins Co	lligo	
New New E-mail Items * New	ignore ig	elete	Reply Reply Forward All Respond	P -	Managed Metad SP Folder My Matters Quick Steps G Colligo Email Manager Mo
Favorites		<	Search Inbox (Ctrl+E)	Q	
🔄 Inbox	ms		Arrange By: Date Newest on top		SharePoint 2010: Bits from the Edge Colligo Networks <events@colligo.ccsend.< td=""></events@colligo.ccsend.<>
Deleted	<b>Items (40)</b> ting		▲ Two Weeks Ago ☐ Colligo Marketing 1/25/2012		If there are problems with how this message is displayed, Sent: Fri 2/12/2010 9:48 AM To: Dave Mackay
▲ Colligo Email ☑ Deleted	-		Webinar: The iPad Invasion - Lev		Having trouble viewing this email? <u>Click here</u>
	5		Colligo Events 2/28/2010 Last Chance To Register - Share		×
P a rolders P a Recover Q Search F			Colligo Events 2/17/2010 SharePoint 2010 Webinar: Micro		Dear Dave Mackay ,
▲ DMackay@co	lligo.com		Colligo Networks 2/12/2010 SharePoint 2010: Bits from the E		Join us for SharePoint 2010: Bits from the Edge one-day conference for SharePoint developers. E
Inbox	-		Colligo Events 2/3/2010		SharePoint Connections, this conference brings i
ى 9 🖌 🖌 🖂	<b>∻</b>		SharePo	oint 201	0: Bits from the Edge - Message (HTML)

	<b>9</b> 0	🔶 🗇 🗦		Sh	arePoint 2010: Bits from	n the Edge - Message	(HTM	L)		
File	Mes	sage								
Move	Copy	lignore X & Junk ≠ Delete	Reply Reply All	Forward Meeting	Anaged Metad. My Matters Team E-mail	诌 SP Folder 🙈 To Manager ✔ Done	4 •	Move	Pules ▼ MOneNote Actions ▼	interest of the second
Colligo E	Email	Delete	F	Respond	Quic	k Steps	E.		Move	Tag
<ul> <li>If the</li> <li>From:</li> <li>To:</li> <li>Cc:</li> <li>Subject:</li> </ul>	To: Dave Mackay Cc:									
	Having trouble viewing this email? <u>Click here</u>									
			Dearl	Dave Mackay ,				ETAILS		

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

Move Cor		🔍 Search () Colligo ₹	Hove ▼ Pules ▼ Move ▼ ConeNote			
Colli	Favo	ites				
nse ke		Colligo				
inse ke		bradsTest				
	History					
horeply 📄 Home						
ge were re	4	Other SharePoint Locations				

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:

🔘 Sele	ct Move Destination	
🛄 Ado	I 🛄 Remove 📅 Edit   🚖 🚞 🔎 💭	
Þ 👬	Home	
Selecte	d location:	
	OK Cancel	

**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:

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

0 를 ッ  -		Inbox	- DMackay@colligo.com - Microsoft Out
File Home Send / Receive Fold	r View Add-Ins Co	lligo Launchpad Liv	e Meeting Service
New New E-mail Items v	All 🔤 More 🛪	🚑 To Manager 👔	Move to: ?
New Delete	Respond	Quick Ste	ps 🕞 Colligo Email I
Favorites	<ul> <li>Search Inbox (Ctrl+E)</li> </ul>	م	BYOD Survey Results Webin
🔄 Inbox	Arrange By: Date	Newest on top	-
Sent Items <ul> <li>Deleted Items (101)</li> </ul>	▲ Yesterday		Colligo Marketing Sent: Tue 5/29/2012 12:48 PM To: Dave Mackay
Accounting	🚖 Colligo Marketing 💡	Tue 1:40 PM	
Colligo Email Manager	BYOD Survey Results	<u>С</u> ору	
Deleted Items		Quick Print	
	▲ Older	A Reply	
Browser	contributor@colligo.	Reply <u>A</u> ll	
Favorites Customized Reports (Colligo Portal)	congo contributor r	Forward	
Shared Documents (Colligo Portal)	DE Develoed link og	*	BYOD and
Folders	element 5 Notification	Mark as U <u>n</u> read	
Recovered Items		Ca <u>t</u> egorize ►	What
🗔 Search Folders	a element 5 Notification	🚩 Follow <u>U</u> p 🔹 🕨	
DMackay@colligo.com	Download link and li	Find Related	
	🚽 🚖 dotfuscator-registrati	✓ Quick Steps ▶	BYOD and SharePoint Survey
Drafts [9]	-		Needs to Know
E Sent Items		Rule <u>s</u>	0 0
Deleted Items (92)		Move ►	Thursday, June 7
a Colligo For SharePoint	Colliga Contributor T	Copy to SharePoint →	Favorites
🐻 Junk E-Mail	a contributor@colligo.	Move to SharePoint →	Colligo
🧊 News Feed	Colligo Contributor T	M One <u>N</u> ote	History
🔁 Outbox	🚖 sales@colligo.com	ignore	🗋 Home
RSS	Colligo Workgroup E	lunk ►	😤 Other SharePoint Locations
RSS Feeds	sales@comgo.com		Today's mobile devices are indispen
Image: Search Folders Image: Spam		X Delete	(BYOD) trend has also created challe
	RE: Screenshots	<sup>3/12/2008</sup>	
TMacKinnon@colligo.com	KE SCIEGHOUS		

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:

<ul> <li>Favorites</li> <li>Inbox</li> <li>Sent Items</li> </ul>	Search Inbox (Ctrl+E)	Webinar: The iPad Invasion - Leveraging SharePoint for Mobile Enterprise Security
Deleted Items (40)	▲ Two Weeks Ago	Copligo Marketing Copied to SharePoint
Colligo Email Manager     Deleted Items	Webinar: The iPad Invasion - Lev	Sent: Wed 1/25/2012 6:40 AM To: Dave Madkay
Favorites	Older     Colligo Events 2/28/2010     Last Chance To Register - Share	
Product Management (Sitel Shared Documents (Colligo	Colligo Events 2/17/2010 SharePoint 2010 Webinar: Micro	
Recovered Items Search Folders	Colligo Networks 2/12/2010 SharePoint 2010: Bits from the E	Free webinar The iPad invasion:
✓ DMackay@colligo.com ▷ □ Inbox	Colligo Events 2/3/2010 Live Webinar: Is SharePoint 201	Leveraging SharePoint for Mobile Enterprise

## Moving or Copying Multiple Emails

To move or copy multiple emails:

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

The **Edit Properties** dialog displays:

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

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

See Using Managed Metadata for information about metadata fields.

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

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

The emails are moved or copied to the selected folder.

# 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 <u>Managing Settings</u>.

# **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:

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

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.

Options Content Type: Document Properties Name Value Attachment Message Body To-Address /O=FIRST ORGANIZATION/OU=EXCHANGE ADMINIS' From-Address /O=FIRST ORGANIZATION/OU=EXCHANGE ADMINIS' Cc-Address Bcc-Address Bcc-Address Fags Fl Suggestions Public Relations [Keywords]	O Edit Properties		x
Properties       Name     Value       Attachment        Message Body        To-Address     /O=FIRST ORGANIZATION/OU=EXCHANGE ADMINIS'       From-Address     /O=FIRST ORGANIZATION/OU=EXCHANGE ADMINIS'       Cc-Address        Bcc-Address        Tags     p       Suggestions	Options		
Name     Value       Attachment	Content Type: Document	Ŧ	
Attachment       Message Body       To-Address       /O=FIRST ORGANIZATION/OU=EXCHANGE ADMINIS'       From-Address       /O=FIRST ORGANIZATION/OU=EXCHANGE ADMINIS'       Cc-Address       Bcc-Address       Tags       pl       Suggestions	Properties		
Attachment     Image: Constraint of the second	Name	Value	*
To-Address     /O=FIRST ORGANIZATION/OU=EXCHANGE ADMINIS'       From-Address     /O=FIRST ORGANIZATION/OU=EXCHANGE ADMINIS'       Cc-Address	Attachment		
From-Address     /O=FIRST ORGANIZATION/OU=EXCHANGE ADMINIS'       Cc-Address	Message Body	۸ ۲	
Cc-Address       Bcc-Address       Tags       pl       Suggestions	To-Address	/O=FIRST ORGANIZATION/OU=EXCHANGE ADMINIS	
Bcc-Address Tags p 300000000000000000000000000000000000	From-Address	/O=FIRST ORGANIZATION/OU=EXCHANGE ADMINIS	
Bcc-Address       Tags     p       Suggestions	Cc-Address		
Suggestions	Bcc-Address		
	Tags	p Q	
Public Relations [Keywords]			*
OK Cancel			

#### **Using Person or Group Metadata**

You can assign person or group metadata when filing emails.

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

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

#### Validating a Person or Group Name

To validate a person or group name:

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

field and click the validation icon 🖳

The following error message displays:

Person Single		8, 🔟
	No exact match was found. Click the item(s) that did not resolve for more	options.

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

Edit Properties				
Options				
Content Type: Document	Ŧ			
Properties				
Name		Value		
* Name	Bob Barker_01Feb11 14.20.1	5_FW Get More for Less with Patch .msg		
Title	FW: Get More for Less with	Patch Plus Antivirus		
Person Single	e;	S./ 🗓		
	Suggestions	he item(s) that did not resolve for more options.		
Person and Group Si	B <mark>e</mark> n H <mark>e</mark> nd <mark>e</mark> rson	&_ 11	Ξ	
· · ·	Bill <mark>E</mark> ngland		-11	
Person Multi	Brad Wild <mark>e</mark>	S-/ 12		
Person and Group M	Bra <mark>e</mark> d <mark>e</mark> n Calyniuk	S-/ [1]		
Person Home Membe	— Brent Bolleman CORPORATE\ablock	8/11		
	CORPORAT <mark>E</mark> \abiock		-11	
<ul> <li>Person Required</li> </ul>	CORPORATE\aboogensen	S- 12	_	
Group Within Group	CORPORAT <mark>E</mark> \barryj	S-/ 11	-	
	CORPORAT <mark>E</mark> \bbark <mark>e</mark> r	,		
	None of the above	OK Can	el	
	Remove			
	More Names	29	25	

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 ito view the directory of your SharePoint people and groups. The **Search People** dialog displays:

0	) Searcl	n People				x
	Find					2
		Display Name	Email	Account N	Vame	
		Type into t	the search box above then p start your search.	ress "Enter" to		
				OK	Can	icel

- 2. Click the search icon *P* 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:

Edit Properties			
Options			
Content Type: Docume	nt -		
Properties			
Name	Value	*	
Keywords			
Sensitivity	0		
* Product (BCS)		1	
	This field is required.		
test	2	<b>1</b>	
Fiddle			
TestTheDate	Select a date	15	
From	Microsoft	-	
	ОК	Cancel	

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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:

🔘 Choose Li	Choose List Item			
Search Optic	Search Options			
Find:			2	
Search Resu	lts			
ProductID	Name	Description		
1	Bandage	30 pieces		
2	Syringes	50mL, 50 units		
3	Gauze	1000 pieces		
4	Latex Gloves	100 pairs		
5	Foreceps	1 set		
6	Tongs	1 set		
7	Plastic Scissors	1 pair		
8	Catheter	1 unit		
9	Kidney Bowl	1 piece		
			OK Cancel	

# 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 Properties** screen:

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

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:

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

**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 Share-Point, 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:

Insert Attachment From SharePoint           History         Favorites         Folders         Sites		<u> </u>
Shared Documents > Briefcase > Android JB Matters > Hilton v Marriott	Arrange By: Date      1/17/2013	Newest on top
IB Matters > Hewitt v Anderson Shared Documents > Briefcase > Android	Mercenter Marking Mercenter Merce	uge savings on Samsun
	·	•
	Insert Item Insert	Link Cancel

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 Share-Point
- 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:

Edit Properties	Same Same					
FW: Get More for Less SharePoint 2010 Webi	Group Edit: Enter property va	alues to apply to the 2 selected upload items.				
	Options					
	Content Type: Document	Ŧ				
	Properties					
	Name	Value				
	Title	<click a="" all="" for="" here="" items="" selected="" set="" to="" value=""></click>				
	column	\$\$				
		Value specified here will apply to all selected items.				
	customprop	<click a="" all="" for="" here="" items="" selected="" set="" to="" value=""></click>				
	Enterprise Keywords					
		Value specified here will apply to all selected items.				
	(					
< >		OK Cancel				

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:

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

The Rules and Alerts dialog displays:



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

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

## **Using Outlook Quick Steps to File Emails**

To use Quick Steps to file emails:

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



#### The Edit Quick Step dialog displays:

Edit Quick Step	?
	e: Quick Step
Add actions be	ow that will be performed when this quick step is clicked on.
Choose an Ac	tion 💌 🗙
Add Action	
Optional	
Shortcut key: Tooltip text:	Choose a shortcut  This text will show up when the mouse hovers over the quick step.
	Finish Cancel

- 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 clicking the Quick Step you created in the Quick Steps group.

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

# **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:

Ocolligo Email Manager Configurati	ion X
SharePoint Sites	🔽 Launchpad
Favorites	🖽 Add 🛄 Remove 📅 Edit 🚖 Display Favorites 📳 Import 🏹 Export
Folders	▲ Launchpad
Search Locations	🚖 Email Manager Favorites
Search Options	▲ 🔛 Links
Launchpad	Colligo
Settings	
	Close

## **Editing the Launchpad Tab**

To edit the name of the Launchpad tab:

1. Select Launchpad and click Edit.

The **Edit Launchpad** dialog displays:

Edit Launchpad				
Title:	Launchpad			
Screen Tip:				
Description:				
	OK Cancel			

- 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:

Add Group	, <b>x</b>
Title:	New Group
Screen Tip:	
Description:	
	OK Cancel

- 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:

Add Butto	n
Title:	New Button
URL:	
Icon:	Browse
Screen Tip:	
Description:	
	OK Cancel

- 2. In the **Title** field, enter the name of the button.
- 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:

Add Item	x
Title:	New Item
URL:	
	This field is required.
Icon:	Browse
Screen Tip:	
Description:	
	OK Cancel

- 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:

File	Home	Send / Receiv	e Folder	View	Add-Ins	Colligo	Launchpad	
۲								
Launchpa	d Favorites	Colligo						
Co		stomized Report	1					
-	nbox	ared Documents			nbox (Ctrl+E)			-

## **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.

🔘 Colligo Email Manager Configurati	on	×
SharePoint Sites	💶 Launchpad	
Favorites	🛄 Add 🛄 Remove 📴 Edit 🚖 Display Favorites 💽 Import 💽 Export	
Folders	A Launchpad	
Search Locations	🚖 Email Manager Favorites	
Search Options Launchpad Settings	▲ Iinks Colligo	

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.

Colligo	•	х
Search SharePoint 🔎 🔻		

## Searching

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

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

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

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

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:

۲		۲.
$\triangleright$	Items: 8 Locations: 3 in progress, 1 completed	

The search locations display. You can click **Cancel** to remove results from a particular site from the search.

colligo		× 🔻
Arrange By: Date	e Ne	west on top
▲ 5/3/2012		
Colligo and	SharePoint	Solves Rem
, Items: 8 Loca	tione: 2 in	programa 1
completed	uons. 5 in	progress, r
Colligo Tear Retrieving s data (0 ite	earch meta	a Cancel
Performing s item(s) foun	search (0	Cancel
P Briefcase (B Search com		m(s) found)
Colligo Tear Performing item(s) foun	search (C	

## **Defining Search Locations and Terms**

To define your search locations and parameters:

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

Search Locations
Search Options

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

Any results display under the search field:

Colligo			<b>▼</b>
test	۰ م	r	
Arrange By: Date			Newest on top
4 28/06/2011			
Corporate\Bcheng New Microsoft Office Word Document.docx			10:17 PM -
Corporate\Bcheng Bernard Cheng_28Jun11 08.44.01_test.msg			7:57 PM
Corporate\Bcheng Bernard Cheng_28Jun11 08.44.01_test.msg			3:46 PM
Corporate\Bcheng random_test_doc.txt			3:39 PM
Corporate\Bcheng			3:39 PM ,

**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**:

-		
✓	Date	
	From	2

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

test	Q	Ŧ		
Arrange By: Date			Oldest on top	
▲ 01/04/2007				-
Corporate\Barryj B's Beverages, Inc. Project Requirements			12:00 PM	
09/03/2010      Corporate\Ahoogensen      Test Document.docx			12:50 AM	
Corporate\Ahoogensen Test Document2.docx			12:52 AM	
Corporate\Ahoogensen Test Document3.docx			12:54 AM	
Corporate\Ahoogensen Test22.docx			12:59 AM	Ŧ
Items: 202 Locations: 1 completed, 1 completed	te with w	arning		

Additionally, if an email with an attachment is returned in your search results, the paperclip icon displays to indicate the attachment:

Newest on top
j 9:51 AM

## **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**.
- 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:

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

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

The Add Search Location dialog displays:

Add Search Location	
0	
Home	
Selected location: Home	
	OK Cancel

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

The site is now included in your search locations list.

#### **Removing a Search Location**

To remove a site from your search locations list:

- 1. In the **Colligo Email Manager** group on the **Home** tab in Outlook 2010 or 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.

ſ	🔘 Colligo Email Manager Co	onfiguration	×
	SharePoint Sites	Search Options	
	Favorites	Outlook	
	Folders	Search Outlook Inbox	
	Search Locations	Limit results to: 200	
	Search Options	SharePoint Query Options	5
	Settings	Limit results to: 200	
		Search On	
		Files and Folders Files Only Folders Only	
		All Files Filter Files	
		Type Extension	*
I		📝 🖷 Microsoft Word Document docx	E
I		Microsoft Excel Worksheet xlsx	
		Microsoft PowerPoint Prest pptx	
		📝 🖷 Microsoft Word 97 - 2003 I doc	
l		📝 👹 Microsoft Excel 97-2003 W xls	
		Microsoft PowerPoint 97-2 ppt	×
		Clos	;e

- 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.