



Evaluator's Checklist

Colligo Engage for Email Management

Welcome

Thank you for choosing to evaluate Colligo Engage! Use this checklist to help you identify the criteria that are most important to your organization and how alternative solutions compare to Colligo Engage.

If you would like to set up a guided evaluation of Colligo Engage, please contact Colligo Technical Services at +1.866.685.7962 or +41.79.930.8193.

Evaluation Criteria	Colligo Engage	Alternative
FILING CONTENT		
Drag-and-drop emails and attachments to SharePoint/Office 365 within Outlook folder tree (Outlook app) or Mac Finder (Mac app), online and offline.		
Automatically file sent emails to Office 365/SharePoint using Send-and-File (Outlook app).		
Automatically move incoming emails to SharePoint using Outlook rules (Outlook app).		
Declare records using SharePoint's in-place records management.		
TAGGING CONTENT		
File to recently used location/history (Outlook app).		
File attachments received on mobile devices to SharePoint/Office 365 (Outlook app).		
Automatically extract email and file tags with 22 common properties, such as "To", "From", "Subject" and "Send Date" (Outlook app).		
Use any of SharePoint's metadata, including enterprise-managed metadata (taxonomies, keywords) and Lookup metadata (Outlook app).		
Categorize emails and attachments types to comply with regulatory and organizational requirements.		
Tag documents individually or in bulk for multiple file uploads.		
WORKING OFFLINE		
Always have access to SharePoint/Office 365 content while offline with the ability to file and tag, without administrator action needed.		
Optionally set sync to manual, every 15 mins, 30 mins, hour, day or every time the client app is opened.		
Control which folders, lists, views, libraries or sites are synced.		
VIEWING CONTENT		
Work with SharePoint/Office 365 content from any desktop or mobile device (support for Outlook, Windows, Mac, iPad, iPhone, iPod).		
View all common file types - including Office documents, PDFs, images and emails – stored in SharePoint/Office 365 directly in the Outlook preview pane without the need to open them or open a browser (Outlook app).		
View email and attachment document properties including SharePoint metadata.		

Evaluation Criteria	Colligo Engage	Alternative
Use SharePoint views to increase efficiency by making important data visible at-a-glance.		
View standard and custom lists including events, issues, contacts, announcements, tasks, and agendas.		
SEARCHING FOR CONTENT		
Use keywords or email meta tags to search for emails and attachments.		
Search for content simultaneously or independently on the device, in Outlook folders (Outlook app) / Finder folders (Mac app) and on SharePoint/Office 365.		
Create favorites for quick access to the folders and files used most often.		
SHARING CONTENT		
Send documents as links or email as full attachments (Outlook app).		
Copy and paste SharePoint/Office 365 links into other documents or apps.		
EDITING CONTENT		
Check files in and out for editing. Edit a document while offline and automatically sync the changes when you are back online.		
Edit metadata including managed metadata and enterprise keywords. Edit custom and standard lists.		
CONFIGURING USER SETTINGS CENTRALLY		
Configure and manage all client apps/devices from a central console.		
Centrally push out new SharePoint sites to all users/groups of users.		
Specify exactly which sites can be accessed by each user or group.		
REPORTING AND ANALYTICS		
Access user activity logs centrally.		
Create reports to monitor compliance, engagement, security.		
INTEGRATING WITH EXISTING INFRASTRUCTURE		
Supports SharePoint 2010, 2013 and Office 365.		
Does not require anything to be installed on your SharePoint servers.		

Contact Us

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