Colligo Email Manager for Outlook User Guide

User Guide

Contents

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Figures

About This Guide

This document provides guidance for the installation and use of Colligo Email Manager for Outlook.

Additional documentation is available on the Colligo Support website at www.colligo.com/support/documentation.

For sales related questions, please contact Colligo Sales at www.colligo.com/contact-sales.

Audience

This guide is intended for use by users of Colligo Email Manager for Outlook.

Requirements

Requirements are listed in the PDF version of the Release Notes, which are available on the Colligo Support website at http://www.colligo.com/support/colligo-email-manager-outlook/release-notes.

They are also listed in the Colligo Email Manager System Requirements knowledge base article at http://www.colligo.com/support/colligo-email-manager-outlook/requirements

Terminology

Throughout this document, Colligo Email Manager for Outlook will be referred to as Colligo Email Manager.

Colligo Technical Support

If you have a problem with your Colligo software, following are the available support options:

1. Colligo Knowledge Base: www.colligo.com/support/knowledgebase.

2. Colligo Support Community: www.colligo.com/support/community.

This community is free and open to anyone.

3. Colligo Online Support: www.colligo.com/support/request.

Submit a ticket online if you have current M&S or an active subscription.

Installation

Colligo Email Manager is available from the Colligo website and comes with two installers. Differences are noted in the table below. If you are unsure which to use, use the EXE.

Feature	EXE	MSI
Software Prerequisites	Automatically installed	Does not install prerequisite software
Installation Type	Interactive	Silent or Interactive
Customizable	No	Yes

EXE Installation

EXE installation takes place as follows:

1. Double-click the executable and Colligo Email Manager will prepare the installation wizard.

2. On the **Welcome to the installation wizard** popup, click **Next**.

3. On the **Ready to Install** popup, click **Install**.

4. On the **User Account Control** popup, click **Yes** and the product will be installed.

5. On the **Installation Completed** popup, click **Finish**.

Prior to using Colligo Email Manager, you will need to restart Outlook to complete the installation.

MSI Installation

The MSI installer does not install prerequisites. Please ensure they are installed prior to proceeding.

For an interactive installation, double-click the MSI file and install as described for the EXE.

For a silent installation, use the `msiexec` utility command below:

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

Display Language

As of version 8.0.5, Colligo Email Manager has support for French-Canadian localization based on the operating system language.

Upgrading to version 8

As of version 8.0.7, upgrading to Colligo Email Manager from versions 5, 6, and 7 is automatic and is initiated the first time the application is launched. For more information, including how to prevent automatic migration, refer to the knowledge base article **Colligo Email Manager Upgrade Information** (www.colligo.com/support/colligo-email-manager-outlook/upgrade-guide).

First Launch

Colligo Email Manager utilizes the Colligo Engage platform (Colligo Console) to manage user licensing. If you do not already have a Console account, you can sign up for free. An account is required to use the application.

When Outlook first launches, you may be prompted to authenticate with Colligo. The authentication popup you see depends on your Colligo Engage Plan and federation settings.
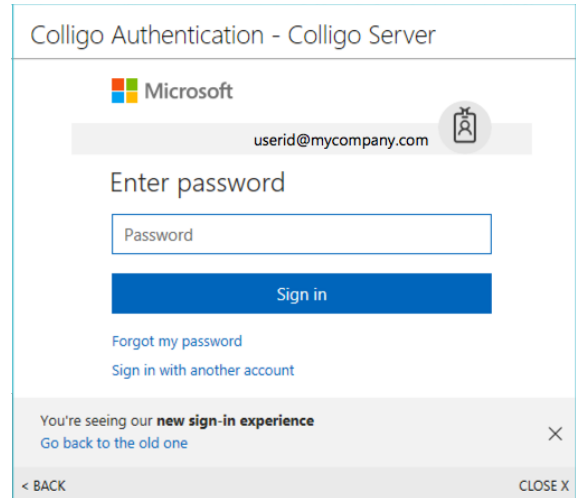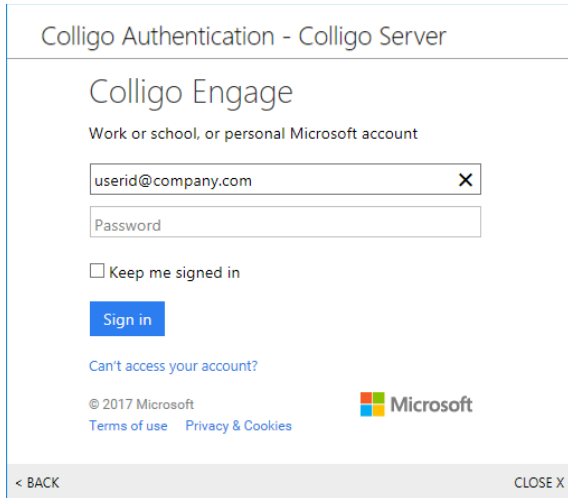
Figures 1 a & b: Authentication (paid plans with federation)

Figure 2: Authentication (Basic Plan with AD)

Figure 3: Authentication (Basic Plan)

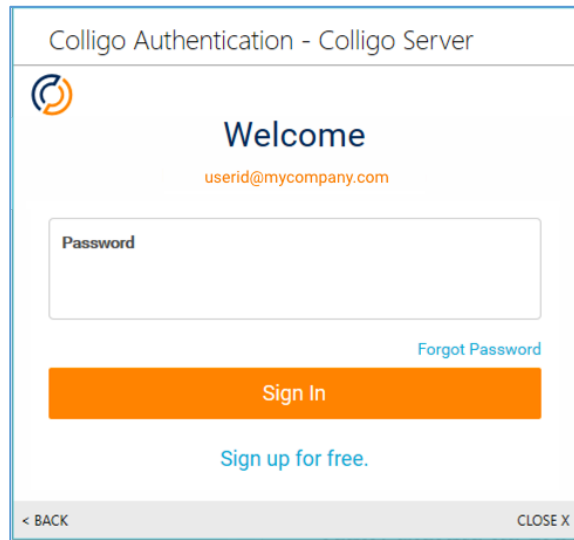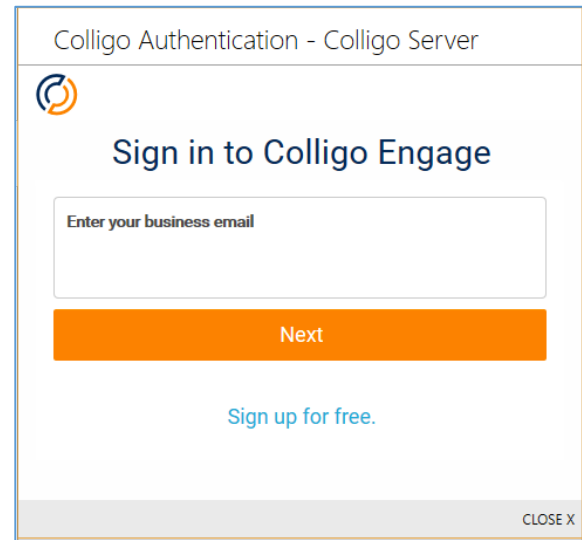Once you have authenticated, Colligo is displayed in Outlook in various locations, as shown in the figure below:
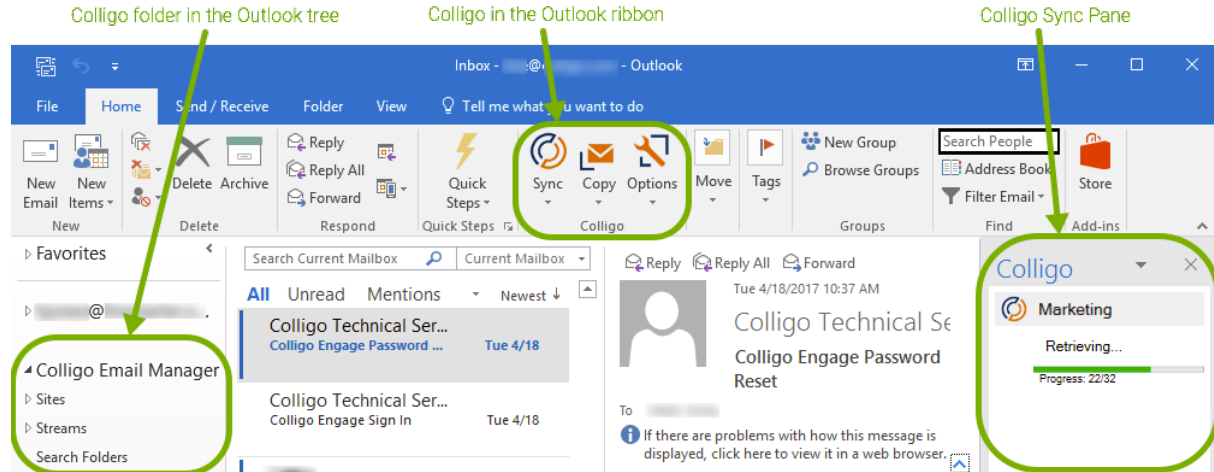

Figure 4: Where Colligo appears in Outlook

Note: As default behavior is for content to be **copied** to SharePoint, the Colligo group of the Outlook ribbon displays the **Copy** option. If this behavior is changed in the Colligo Email Manager Settings, the **Move** option will be displayed.

If configuration data has been configured in Colligo Console, it will be synchronized with Colligo Email Manager. Synchronization progress is displayed in the Colligo Sync Pane. You may be prompted to authenticate with SharePoint for data to be received.

Sites can also be added from within Outlook, as described in the **Adding a SharePoint Site** section.

Single Sign-On (SSO)

As of version 8.0.6, Single Sign-On is available for organizations federated with Colligo Console. This eliminates the need to authenticate with the Engage platform when Outlook first launches. For details, refer to the **Configuring Single Sign-On (SSO)** section of the **Colligo Console Administrator Guide**.

SSO has been successfully configured for Colligo Email Manager if you launch Outlook and you are not prompted to authenticate with Colligo Engage and Colligo is displayed in Outlook as depicted in Figure 4 above.

Note: Federation with Colligo Console is not available in the Basic Plan.

SharePoint Sites

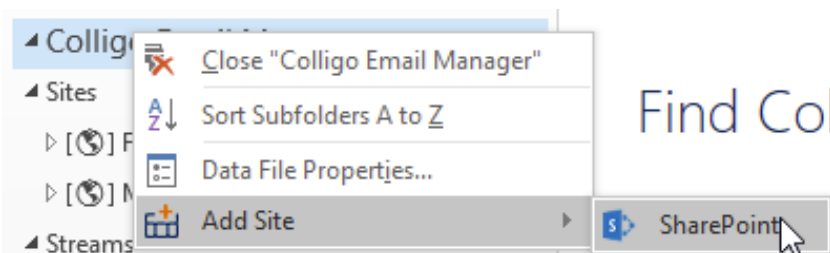## Add a SharePoint Site

To add a SharePoint site

1. Launch the **Add Site** popup using one of the methods described below:

   - From the folder list, right-click the **Sites** entry, choose **Add Site**, and then **SharePoint**.

   - From the folder list, right-click the Colligo folder (default: **Colligo Email Manager**) in the Outlook tree, choose **Add Site**, and then **SharePoint**.

   Note: Administrators can rename the Colligo folder (in Colligo Console) , so you may see something other than **Colligo Email Manager**.

   - From the Outlook ribbon, click **Options**, choose **Add Site**, and then **SharePoint**.
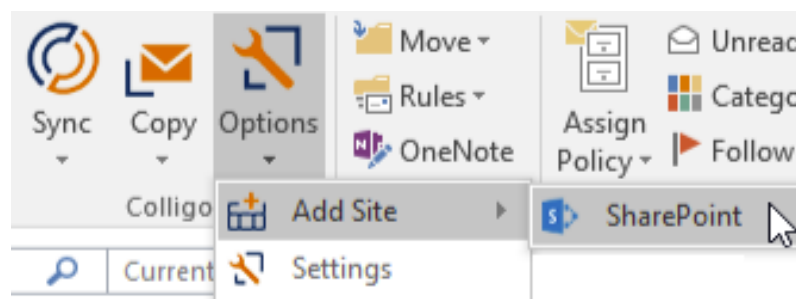
   Note: Once there are 100 sites configured in Colligo Email Manager, you will be unable to add more. An error message will be displayed when the 101st site is added. This limit does not exist on Colligo Console, so you may see more than 100 sites.

2. In the **Add Site** popup, enter the SharePoint URL and click **OK**.

   Note: It is recommended that you load the SharePoint site in your browser, copy the URL, and paste it into the **Add Site** popup.

You may be prompted to enter your SharePoint credentials. The authentication window you see depends on the version of SharePoint you are using.
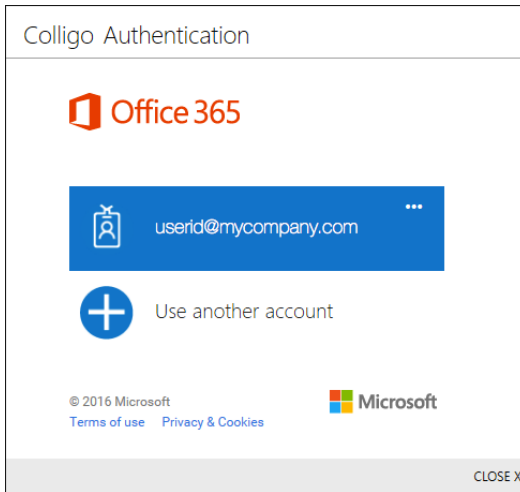
Figure 5: SharePoint Online (Office 365) authentication
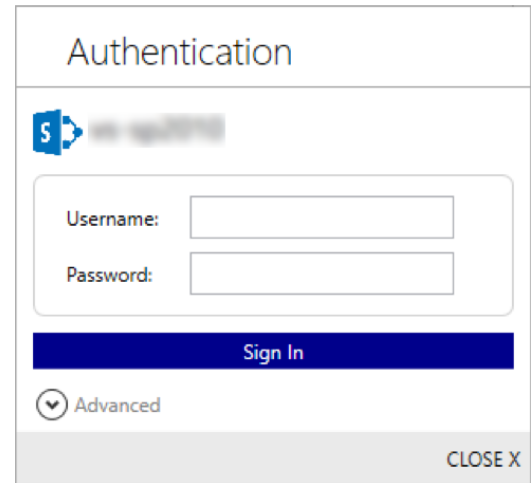
Figure 6: NTLM SharePoint authentication

Once successfully authenticated, navigation information from SharePoint will be displayed in the Colligo folder (default: **Colligo Email Manager**) in the Outlook tree. From here, you can click to navigate and browse SharePoint without leaving Outlook. This is called the **Outlook View** and is described in more detail in the <u>Outlook View</u> section.

Remove a SharePoint Site

To remove a SharePoint site from the folder list, right-click the entry for the site in your folder list and then click on **Remove Site**.
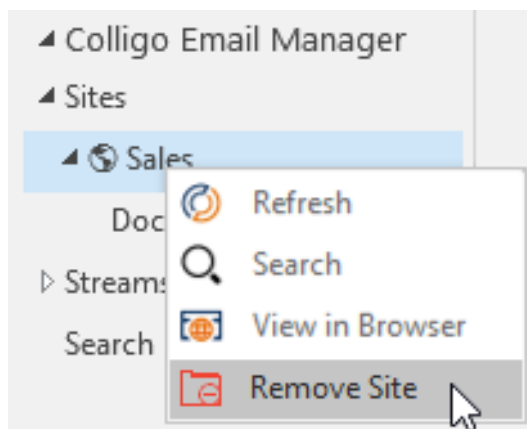
Figure 7: Removing a SharePoint site from the folder list

A message will display to let you know that **Some features will be temporarily unavailable during Site Removal**. Confirm that you wish to remove the site by clicking **OK**.

Search a SharePoint Site or Location

To search SharePoint from within Outlook:

1. Right-click the site or location in the folder list and choose **Search**:
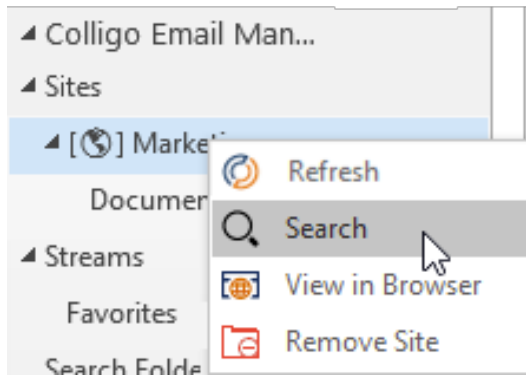
Figure 8: Search a SharePoint site
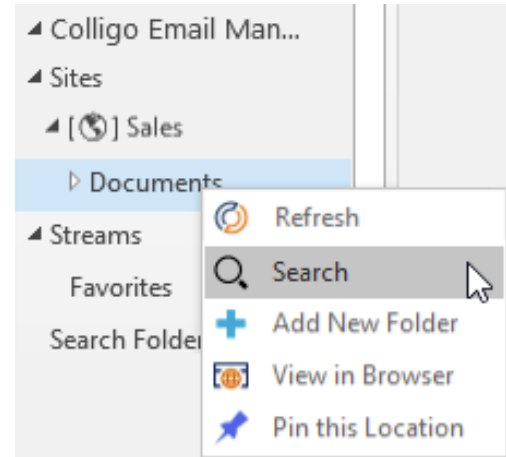
Figure 9: Search a SharePoint location

2. In the **Search** popup, enter your search term(s), then click **Search**.
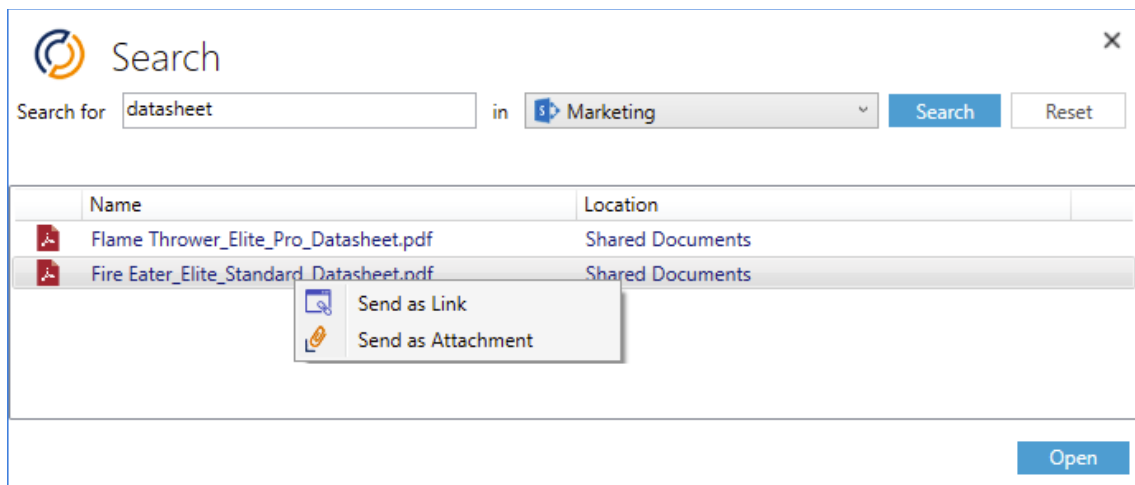
Search results will be displayed in the lower portion of the popup.

From the search results, you can:

- **Open** a file by selecting it and clicking **Open**.

- **Share** a file by right-clicking it and choosing:

   o **Send as Link** to launch a new email with a link to the item in the body of the email.

   o **Send as Attachment** to launch a new email with the item attached to the email.

Site and Location Options

Right-clicking a site or location in the folder list will display the options available at each level:

Figure 10: Site level options

Figure 11: Location level options

The following options are available by default:

Refresh will refresh content at the level at which it is selected. For details, refer to the Refreshing Content section.

Search will search SharePoint (from within Outlook) at the level at which it is selected. For details, refer to the Search a SharePoint Site or Location section.

View in Browser will open the selected location in a web browser.

Note: You may be prompted to enter your SharePoint credentials.

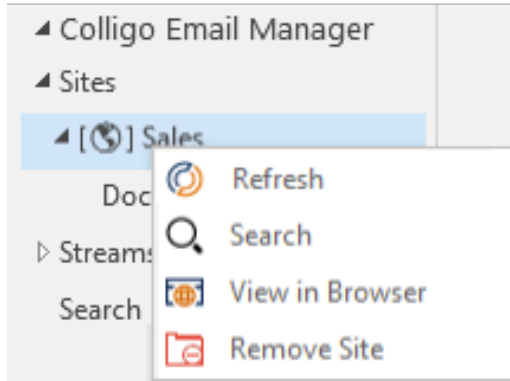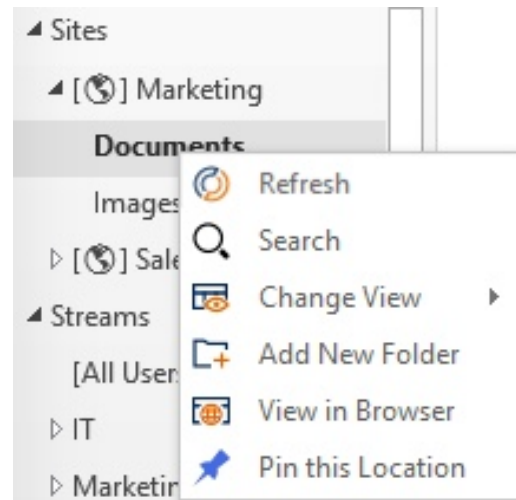**Remove Site** will remove the selected site from the folder list. For details, refer to the Remove a SharePoint Site section.

Change View allows you to change the SharePoint view. A list of available views is displayed when this option is selected. For details, refer to the Changing the SharePoint View section.

Add New Folder will add a new folder to the selected SharePoint location.

Note: Administrators can prevent users from adding new folders to SharePoint from within Colligo Email Manager. If your Administrator has implemented this feature, the **Add New Folder** menu item will not be displayed.

[Un-]Pin this Location will remove or add a location to a stream. For details, refer to the Pinned Locations section.

If policies have been enabled in Colligo Console, you may see additional options.

Outlook View

Outlook View allows you to browse SharePoint without leaving Outlook. Navigation information from SharePoint is displayed in the Colligo folder (default: **Colligo Email Manager**) in the Outlook tree. From here, you can click to navigate and browse your SharePoint sites, libraries, and folders. Content from SharePoint appears in the items pane as you navigate to different locations.

The first time you navigate into a folder it will display the default view for the location in SharePoint.
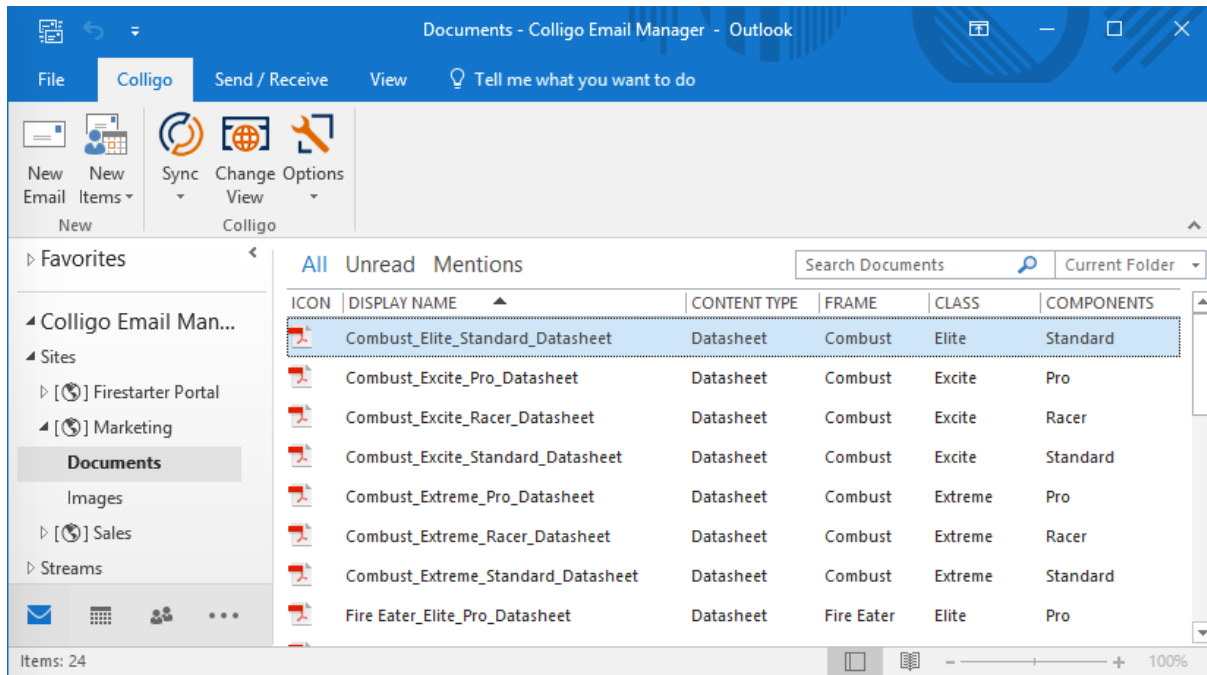
Figure 12: Outlook View

Note: The SharePoint column **Name** is rendered as **Display Name** in Outlook View.

Troubleshooting note: If you do not see SharePoint columns as in the figure above, increase the width of the items pane by:

- increasing the size of the Outlook application window.
- turning the Reading Pane off.
- closing the Colligo Sync Pane.

Depending on the size of your display, you may need to do more than one of the above.

Outlook View Options

Right-clicking an item in the items pane will display some options:
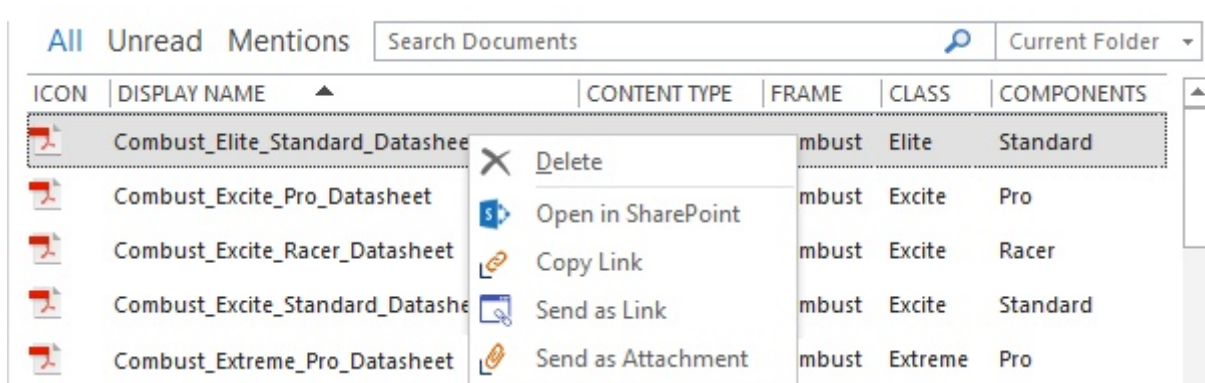
Figure 13: Item right-click options when in Outlook View

Item right-click options are as described below:

Delete will delete the item from SharePoint.

Open in SharePoint will open the SharePoint copy of the item.

Copy Link will copy the SharePoint link to the item.

Send as Link will launch a new email with a link to the item in the body of the email.

Send as Attachment will launch a new email with the item attached to the email

Additional options in Outlook View are:

Open an item by double-clicking it. If a viewer for the item is installed, it will be launched.

Sort contents in the items pane by clicking on the column header.

Change to Browser View, which will display SharePoint content in Outlook in an embedded browser. For details, refer to the <u>Browser View</u> section.

Change the SharePoint View For details, refer to the <u>Changing the SharePoint View</u> section.

Browser View

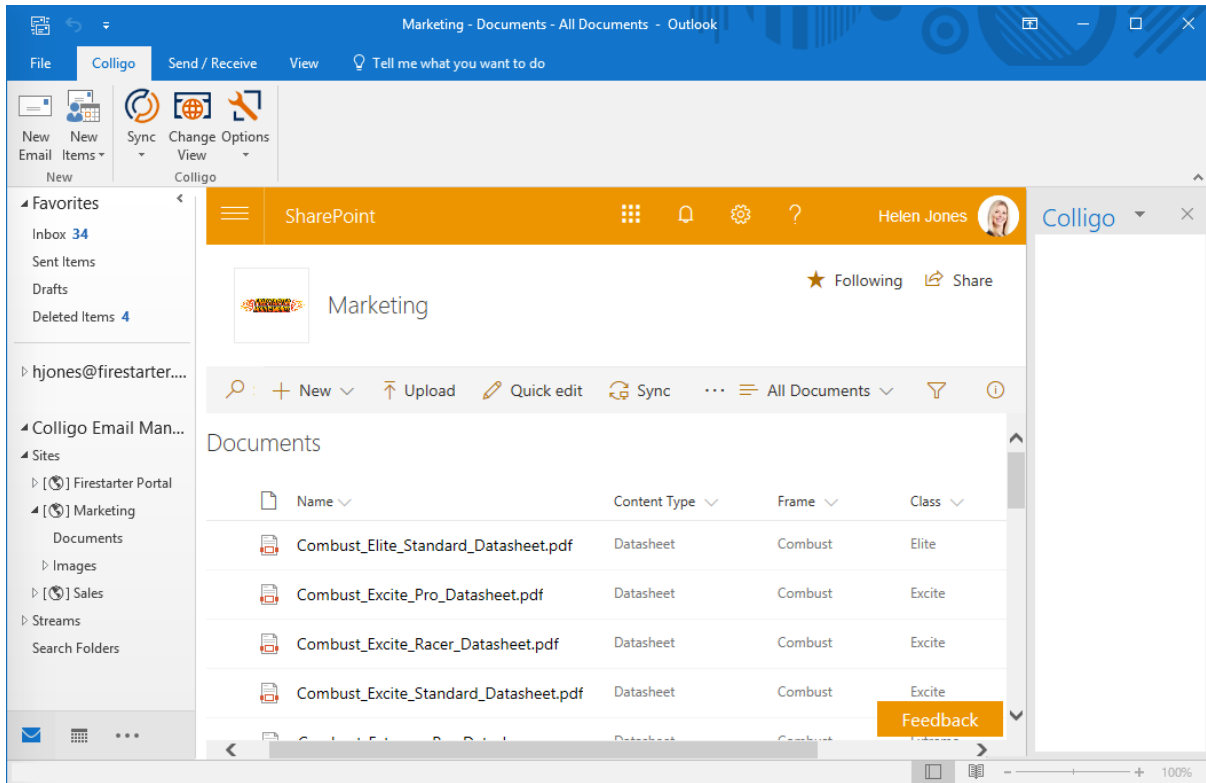Browser View will display SharePoint content in Outlook in an embedded browser.

Figure 14: Browser View

Note: You may be prompted to enter your SharePoint credentials.

To toggle between **Outlook View** and **Browser View**, click the **Change View** button in the Colligo group of the Outlook ribbon:
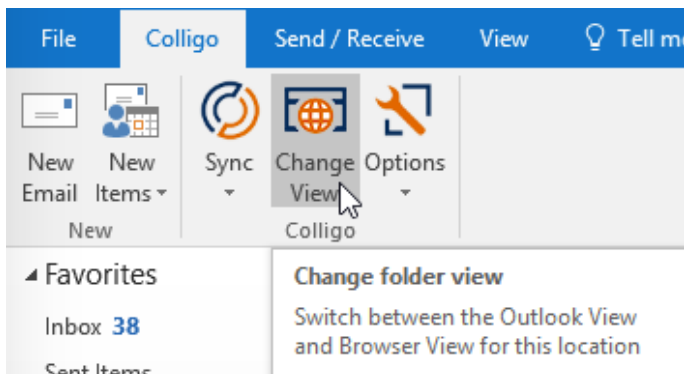

Figure 15: Toggle between Outlook View and Browser View

SharePoint Views

Support for SharePoint Views was introduced in version 8.0.7.

The first time you navigate to a location it will display the default view for the location. Subsequent navigations to a location will display the last view displayed the previous time the location was navigated to. For example, you navigate to a location and the default view of "All Documents" is loaded. You change the view to "Some Documents" and then navigate to a different location. When you return to the first location, the view that will be displayed is "Some Documents".

Column Types

Outlook View supports the Column Types listed in the table below.

Column Type	Notes
Single line of text	
Multiple lines of text	Everything will be rendered on a single line.
Choice	
Number	
Currency	Formatting in Outlook may differ from what is displayed in SharePoint.
Date and Time	
Lookup (information already on this site)	As a filter, it is only supported for simple use-cases.
Yes/No (check box)	
Person or Group	
Hyperlink or Picture	May not be used as a filter in SharePoint.
Managed Metadata	
Task Outcome	

Column types that are not supported include:

- Calculated (calculation based on other columns)

- External data

- Full HTML content with formatting and constraints for publishing

- Image with formatting and constraints for publishing

- Hyperlink with formatting and constraints for publishing

- Summary Links data

- Rich media data for publishing

SharePoint View Configuration

SharePoint Views are supported as described below:

- The **Filter** item must have the filter specified as text when the view is based on a Column of type **Managed Metadata**:

If the filter is a numeric value, no items will be displayed when the view is selected.

> Note: A **Filter** on a column of type **Lookup** where the target field is **DateTime** causes items to be filtered out unexpectedly.

- If the SharePoint View is created using a script or tools (such as PowerShell), the following filters are not supported:

    o DateRangesOverlap

    o In

    o Includes

    o Membership

Changing the SharePoint View

The SharePoint view can be changed for a location from:

- the **Sites** section of the Colligo folder (default: **Colligo Email Manager**) in the Outlook tree.

- the **Navigation** dialog, which is displayed after clicking ... for a large library.

- the **Upload Items** dialog, which can be displayed when filing content.

To change the SharePoint View:

1. Navigate to the location for which you wish to change the view.

2. Right-click the location and select the **Change View** menu item to display available views.
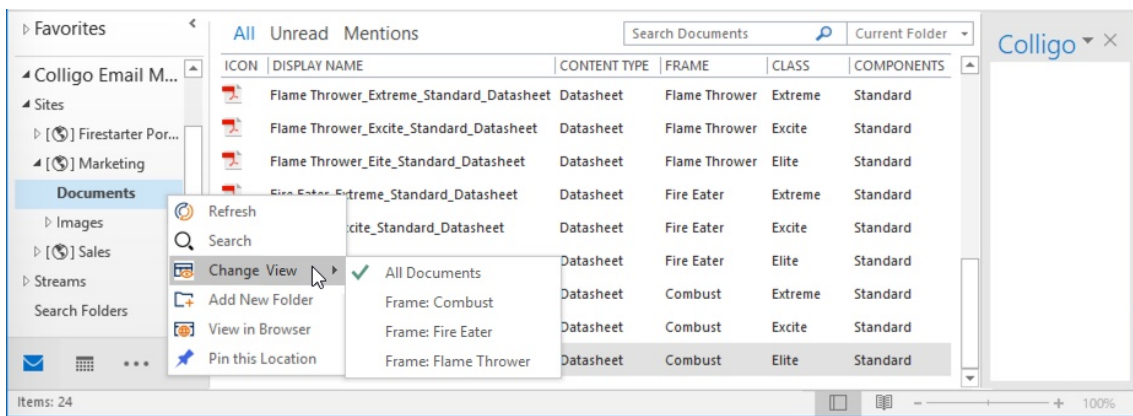
> **Note:** If your SharePoint view is not listed in this menu, it is not supported in Outlook View. For details, refer to the **SharePoint View Configuration** section.

3. Select a view from the list and the view changes as it would on SharePoint:

After You Change a View

When you change the SharePoint View, contents of the items pane will change to reflect the contents and columns of the new view. The view will change for the location everywhere the location appears in the application.

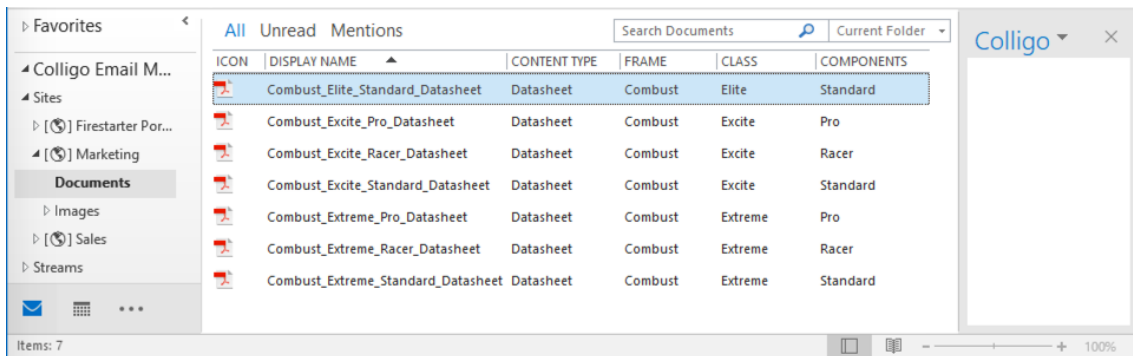A location appears in the application in the following areas:

- Under **Sites**

  o When selected, content displayed in the items pane will change to content available in that view.

- Under **Streams**, everywhere the location is pinned.

  o When selected, content displayed in the items pane will change to content available in that view.

- In the **Navigation** dialog, which is displayed after clicking **…** for a large library.

- In the **Upload Items** dialog, which can be displayed when filing content.

Troubleshooting note: If you are in a location and do not see a folder you know exists in that location, it could be because the folder you are looking for does not exist in the selected view. For details on changing the view, refer to the **Changing the SharePoint View** section.

Streams and Pinned Locations

Streams can be created in Colligo Console or within Outlook. How they appear in the Streams area of the folder list indicates where they were created. Streams pushed from Colligo Console will appear with the group name in square parentheses, followed by the stream name.
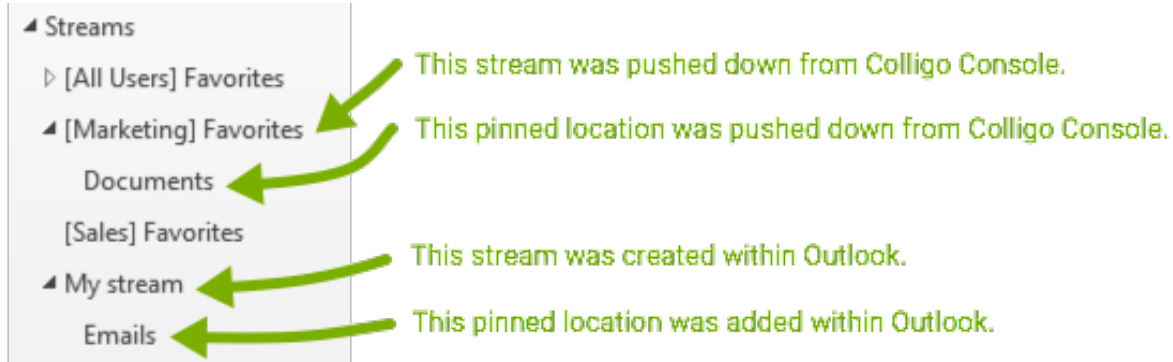

Figure 16: Streams in the Colligo folder list

Streams

A stream is a collection of pinned locations that relate content for easy access. For example, grouping files and folders by project or legal matter or sales product or client.

Add a Stream

To add a stream:

1. Right-click **Streams** in the folder list and choose **New Stream**:
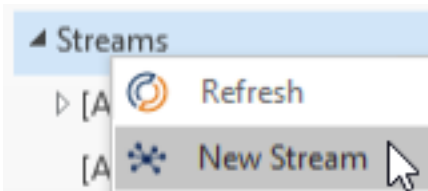
2. In the **Add New Stream** popup, enter a stream name.

3. Click **Add Stream** and the stream will appear in the **Streams** area of the folder list.

A stream can also be added when pinning a location by clicking **Add New** from the Pin Location popup.

Note: Renaming of local streams in the **Streams** section of the Colligo folder (default: **Colligo Email Manager**) in the Outlook tree is not supported. Any renamed stream will revert to the original name when Outlook is restarted. The original name will be displayed in the **Pin Location** popup.

Remove a Stream

To remove a stream:

1. Right-click the stream you wish to delete and choose **Remove Stream**:
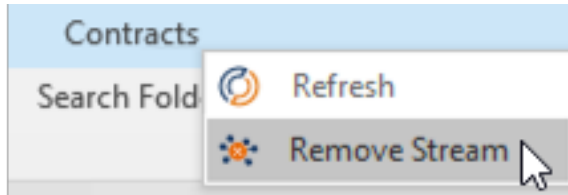
2. A warning message will appear:

3. Click **OK** to continue and the stream is removed from the **Streams** area of the folder list.

Note: You can only remove a stream that you added. You cannot remove a stream that was pushed from Colligo Console.

Pinned Locations

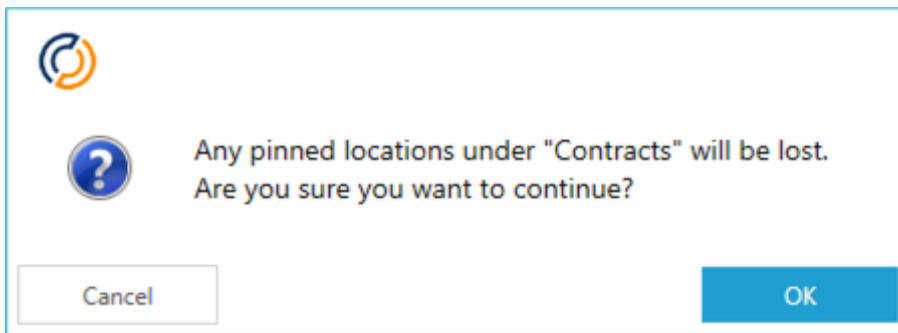Pinned locations are drop targets for your item(s) to be uploaded to SharePoint. They allow one to drag and drop items to that specific location without navigating through a potentially deep tree. The pinned location itself does not contain any navigation information.

Pin a Location

To pin a location:

1. Launch the **Pin Location** popup using one of the methods described below:

    - If the location is in a small library or near the top of a hierarchy:

      Navigate to the location in the folder list, right-click the location and choose **Pin this Location**.
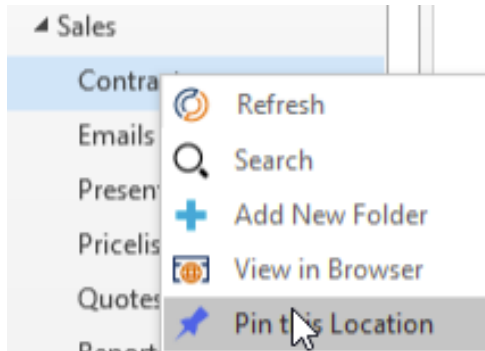
    - If the location is part of a deep hierarchy:

      Use location filtering to find the location, then click **Pin**.

      Note: Location filtering can be done from the **Upload Items** popup (as shown below), or from the **Navigation** popup which is discussed in the **Large Libraries** section.

2. From the **Pin Location** popup, select a stream and click **Pin**.

- Locations can only be pinned to a stream that was created within Outlook, so only these streams are displayed.

- If you have not yet defined any local streams, click **Add New** to add a stream.
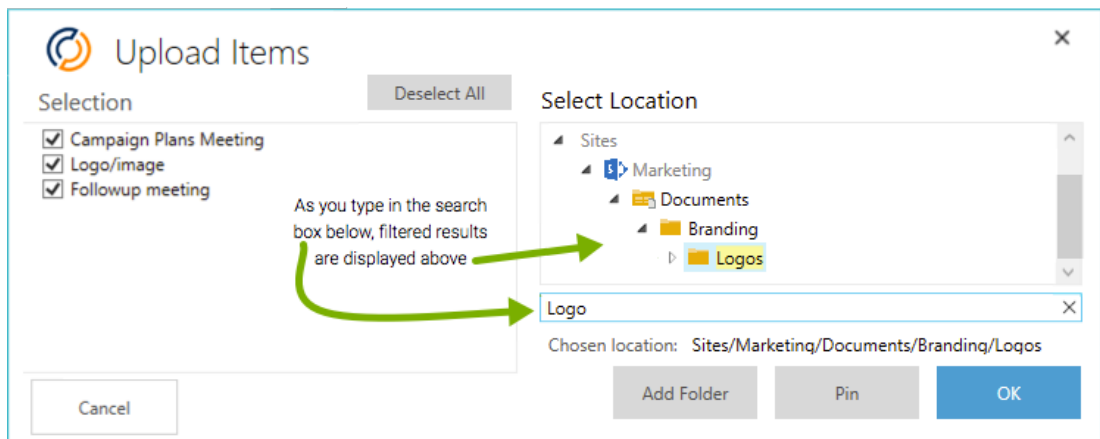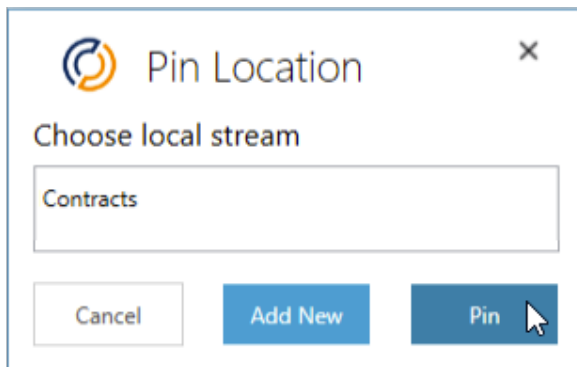 For details on adding a stream, refer to the **Add a Stream** section.

The location is now available in your selected stream in the **Streams** area of the folder list.

Go To Location

Structure (i.e. sub-folders and Document Sets) is not reflected in a pinned location. Structure is displayed under **Sites** and is accessible from a pinned location by right-clicking the location and selecting the **Go to Location** option. This will take you to the location under the **Sites** section of the Colligo folder (default: **Colligo Email Manager**) in the Outlook tree.

Un-Pin a Location

To remove a pinned location from a stream:

1. Expand the stream containing the pinned location.

2. Right-click the pinned location and choose **Un-Pin this Location**:
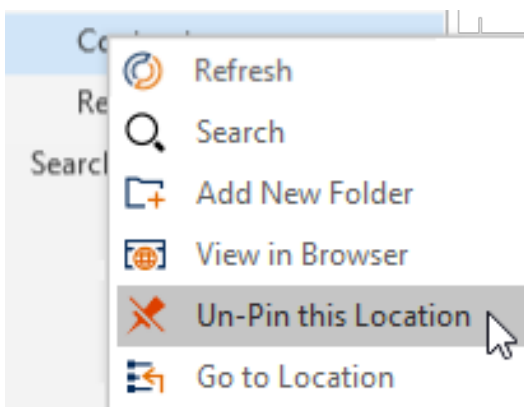
3. The location is no longer listed in the stream.

Refreshing Content

Refreshing a location will update the SharePoint hierarchy at the selected level. Content at that location will also be refreshed. If the selected level no longer exists (or you no longer have access to it), you will be returned to the parent level for that location.

As of version 8.1.0, the **Refresh** menu is available in the **Upload Items** and **Navigation** dialogs.

Sites

To refresh content at all sites right-click **Sites** in the folder list and then choose **Refresh**:

Figure 17: Refresh all sites

To refresh a specific site, right-click the site and choose **Refresh**:

Figure 18: Refresh a site

To refresh a specific location, right-click the location and choose **Refresh**:

Figure 19: Refresh a location

Streams and Pinned Locations

To refresh content in all streams right-click **Streams** in the folder list and then choose **Refresh**:
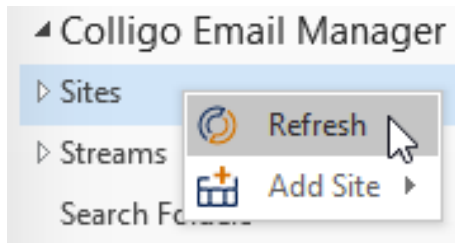

Figure 20: Refresh all streams

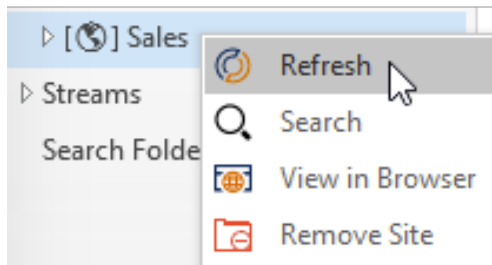To refresh a specific stream, right-click the stream and choose **Refresh**:

Figure 21: Refresh a stream

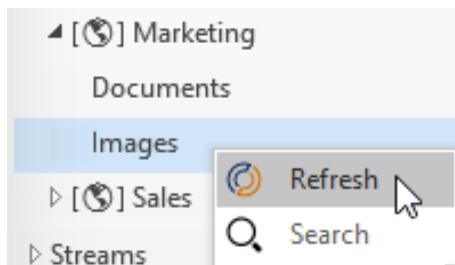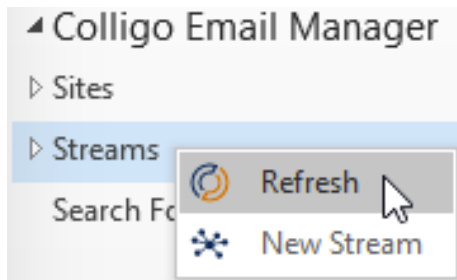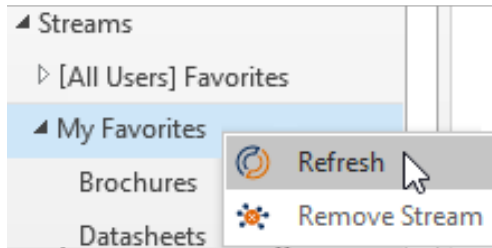To refresh a specific pinned location, right-click the pinned location and choose **Refresh**:
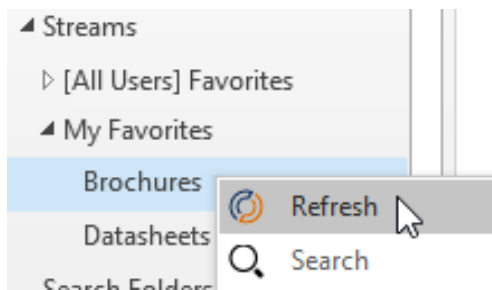

Figure 22: Refresh a pinned location

Synchronize Site and Synchronize All

As of version 8.1.0, the **Synchronize All** option can be replaced by the **Synchronize Site** option. Configurations with a large number of top-level sites will benefit from this feature

To use the synchronize option, click **Sync** on the Outlook ribbon, then click **Synchronize All / Site**.

Figure 23: Synchronize All

When **Synchronize Site** is selected, the **Synchronize Site** dialog will display a list of sites along with the date on which it was last synchronized. Synchronize the entire SharePoint hierarchy for a single site by selecting the site and clicking the **Start Synchronization** button. To enable the **Synchronize Site** menu, refer to the knowledge base article **How do I enable the Synchronize Site dialog?** (https://support.colligo.com/support/solutions/articles/16000079825).

When **Synchronize All** is selected the entire SharePoint hierarchy will be synchronized for all Sites and Streams. Colligo Console data will also be refreshed.
Note: Synchronizing all content is resource intensive.

Show / Hide Sync Pane

To show or hide the Sync Pane, click **Sync** on the Outlook ribbon and then choose
 Show / Hide Sync Pane.

The Sync Pane can also be configured to automatically show during a user triggered synchronization, closing upon completion. For details, refer to the <u>Settings</u> section.
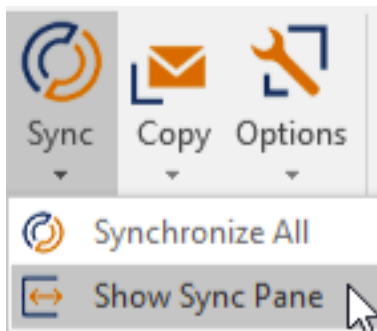

Figure 24: Show / Hide the Sync Pane

Emails and Attachments

Filing Emails

There are three ways to file email(s) to SharePoint: **drag and drop**, a **right-click context menu**, and an **Outlook ribbon button**. With **drag and drop**, the email(s) and its attachments (should there be any) are filed. To file only attachments, use one of the other methods.

When filing emails, default behavior is for:

- filed items to be **copied** to SharePoint.

- users to be prompted to view/update metadata.

These behaviors are specified in the **Upload behavior** (**Copy** or **Move**) and **Suppress metadata prompt** settings. For details on these settings, refer to the <u>Settings</u> section.

Drag and Drop

To file an email or emails using **drag and drop**:

1. Select an email or emails.

2. Drag the selected item(s) and drop them into a SharePoint location.

   Note: Drag and drop support is for email(s) only. Dragging and dropping of Mail folders is not supported. Doing so will result in an error message.

3. If the **Properties** (metadata) popup appears, enter/change metadata and click **OK**. For details on this popup, refer to steps 4 & 5 of the next section.

Right-Click Context Menu – Outlook Ribbon Button

To file an email or emails using the **right-click context menu** or the **Outlook ribbon button**:

1. Select an email or emails.

2. Launch the **Upload Items** popup using one of the methods described below:

   - **Right-click context menu:** Right-click and choose an option from the **Copy/Move via Colligo** menu item. In the example below, **Upload behavior** is set to **Copy**.
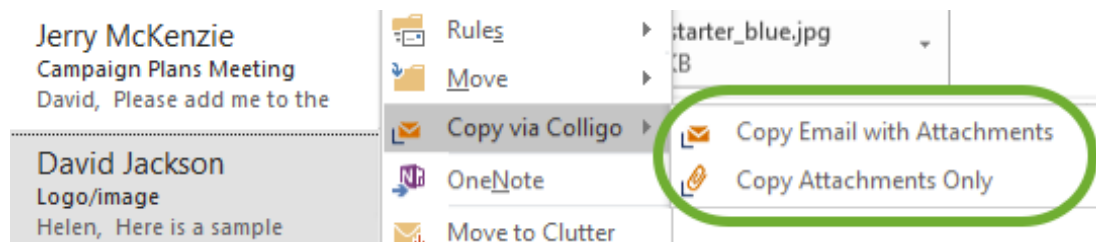
   Note: The option **Copy Attachments Only** will display only if there are attachments.

- **Outlook ribbon button**: Click the drop-down portion of the **Copy/Move** button and choose an option. In the example below, **Upload behavior** is set to **Copy**.
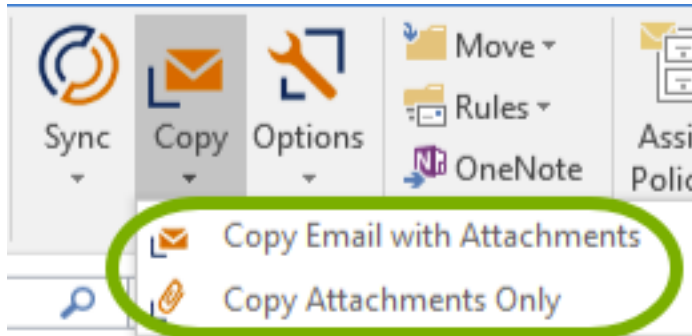
> **Note:** The option **Copy Attachments Only** will display only if there are attachments in the selected email(s).

To file the selected item(s) **with attachments** (should there be any), click on the top part of the **Copy/Move** button. In the example below, **Upload behavior** is set to **Move**.

3. In the **Upload Items** popup, select a filing location and click **OK**.
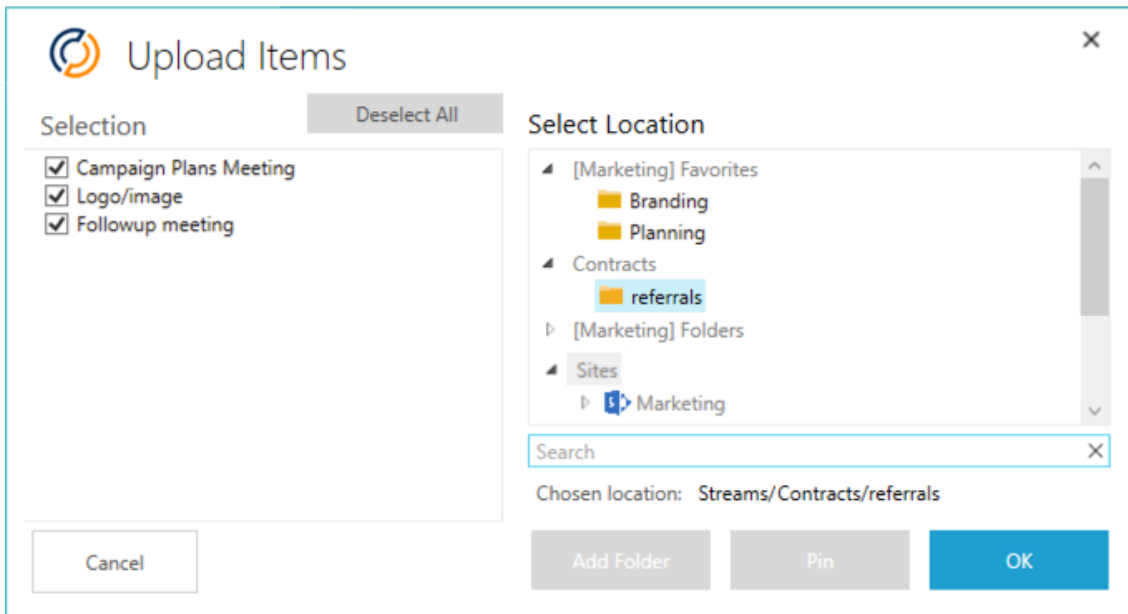
> **Note:** If you have a large hierarchy, it is recommended that you search for the location. For details on searching for your location, refer to the <u>Location Filtering</u> section.

Troubleshooting note: If you are browsing a location and do not see a folder you know exists in that location, try refreshing the view and/or changing the view. For details, refer to the <u>Refreshing Content</u> and <u>After You Change a View</u> sections.

4. If the **Properties** (metadata) popup appears, enter/change metadata for the selected items.

Notes:

- To display only the required properties, click **Required fields only**.

- Properties can be updated per item by selecting the item on the left side of the popup and updating content on the right side of the popup.

  New Feature: As of version 8.0.8, it is possible to update the **Name** of the item.

- Properties can be modified in bulk by selecting more than one item on the left side of the popup. When doing so, fields with differing data will be highlighted. (**From** field in the example above)

- When filtering for choices, the choice picker in the metadata editor removes non-matching items so that only matching items are displayed. (**Product** field in the example above)

5. When you have finished entering/changing properties for all items, click **OK** and content is uploaded to SharePoint. Progress will be displayed in the Sync Pane.

Location Filtering

Location filtering is done from the **Upload Items** popup by entering your search term in the **Search** box. Filtered results are displayed above the **Search** box.
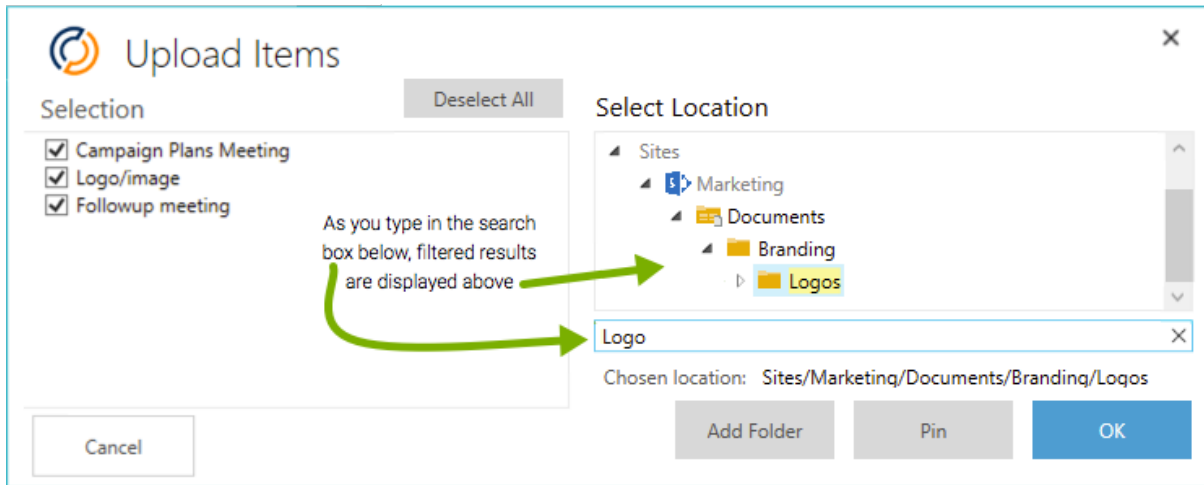

Figure 25: Location filtering

Troubleshooting note: If you are browsing a location and do not see a folder you know exists in that location, try refreshing the view and/or changing the view. For details, refer to the Refreshing Content and After You Change a View sections.

Best Practices for filing to SharePoint

For frequently used locations, the best practice is to drag and drop items to locations that have been pinned to a stream. For details, refer to the Pin a Location section.

For infrequently used locations and locations that are part of a deep hierarchy, it is recommended that you search for the location. For details, refer to the Location Filtering section.

Large Libraries

If you have many items in one location, the folder list in Outlook will display … when the number of items in the folder list exceeds a configurable (in Colligo Console) number of items (default of 100).
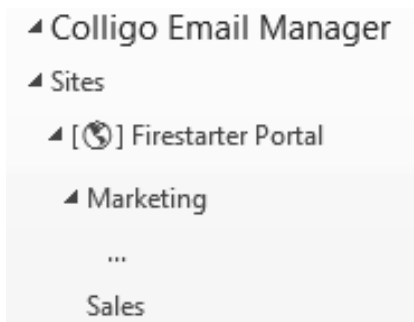

Figure 26: Large libraries

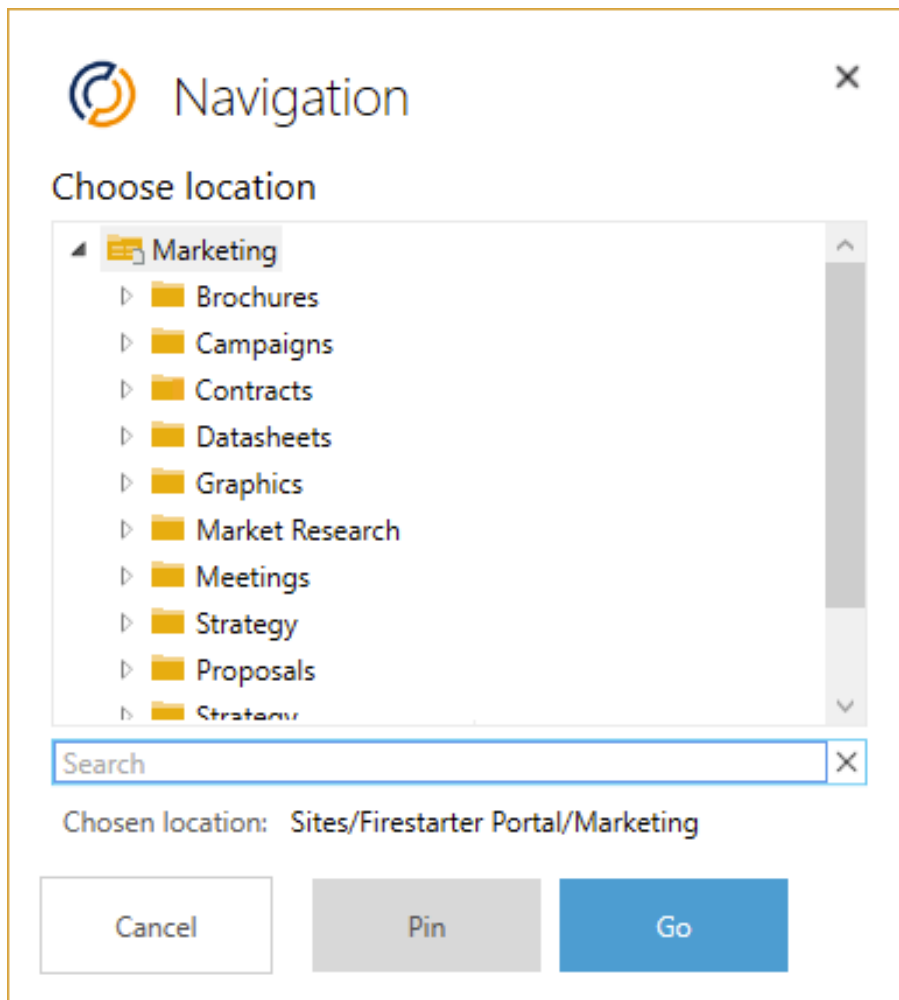When you click on **...**, the **Navigation** popup is displayed:

Figure 27: Navigation popup

There is no limit set in this popup and locations will expand for as many locations as you have.

When using **Drag and Drop**, dragging to the **...** will result in the **Upload Items** popup being displayed. You can then select the location by expanding the folders underneath.

There is no limit set in the **Upload Items** popup, and locations will expand for as many locations as you have. However, if you have a very large number of items, it is recommended that you search for your location by using location filtering, which is discussed in the <u>Location Filtering</u> section.

Troubleshooting note: If you are browsing a location (in either of the above popups) and do not see a folder you know exists in that location, try refreshing the view and/or changing the view. For details, refer to the <u>Refreshing Content</u> and <u>After You Change a View</u> sections..

Sharing content in an email

To share content in an email:

1. Click the **Attach** button on the Outlook ribbon.
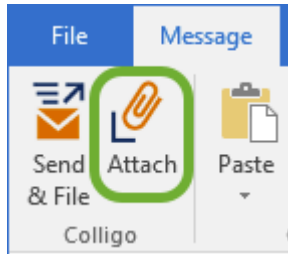
2. In the **Attach** popup, locate the file(s) you wish to attach by selecting the site to search, entering the search string, and clicking **Search**.
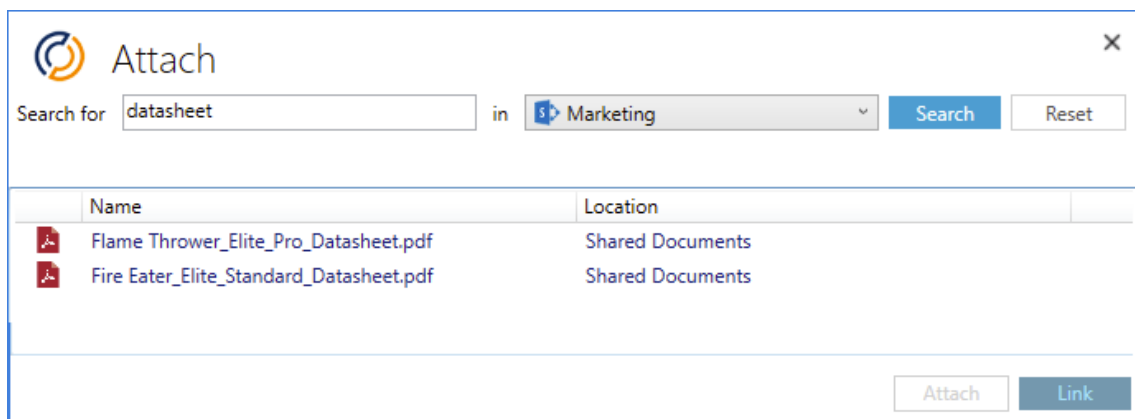
3. From the search results, select the file(s) you wish to share.

4. Share content by clicking the appropriate button:

Attach will insert a copy of the file(s).

Link will insert a link or links to the file(s).

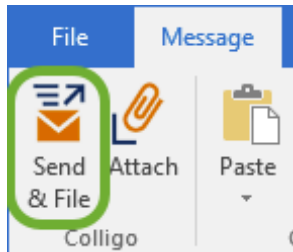### Send & File

Colligo Email Manager lets users file emails to SharePoint at the time of sending the email. To use this feature:

1. Click the **Send & File** button instead of the **Send** button.

2. In the **Upload Items** popup, select a filing location and click **OK**.

3. In the **Properties** popup, enter/change metadata and click **OK**.

For more details on the **Upload Items** and **Properties** popups, refer to steps 3 & 4 of the Right-Click Context Menu – Outlook Ribbon Button section.

Note: Send & File requires a reliable Exchange connection to accurately file emails with valid metadata. If connectivity cannot be established, the email will not be filed.

Uninstallation

To uninstall Colligo Email Manager:

1. Locate the list of installed apps/programs:
   Windows 10: On the Start menu select **Settings**.
       In **Settings**, select **System > Apps & features**.
   Windows 7/8: Click **Start > Control Panel > Programs > Programs and Features**.

2. Select the program, and then select **Uninstall**.
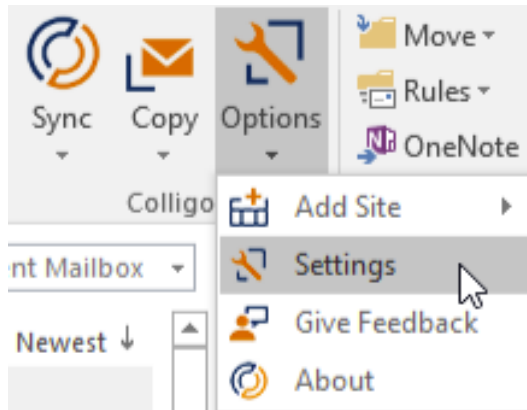
3. Follow the directions on the screen.

To perform a silent installation, use the `msiexec` utility command below:

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

Settings

To view or modify Colligo Email Manager settings:

1. Select **Options** from the Outlook ribbon.

2. Choose **Settings** from the drop-down menu.

Colligo Email Manager has the following configurable settings:

Sync Interval: The SharePoint sync interval can be set to 5 minutes, 10 minutes, 15 minutes, 30 minutes, hourly, daily, and never. The default value is **30 minutes**.

> **Note:** The Colligo Console sync interval is not user configurable and is set to 14 minutes.

Show folder contents in web view: The default value is **unchecked**.

Suppress metadata prompt: The default value is **unchecked**.

Required fields only: If this setting is checked, only required fields are displayed in the metadata window. The default value is **unchecked**.

Upload behavior: The upload behavior can be set to Copy or Move. The default value is **Copy**.

Automatically show synchronization pane: The default value is **unchecked**.

> When **unchecked**, Sync pane behavior will be as specified by the user from the **Sync** button on the Outlook ribbon. If **Show Sync Pane** was selected, the Sync Pane will remain visible. If **Hide Sync Pane** was selected, the Sync Pane will stay hidden.

> When **checked**, Sync pane behavior will be automatic and the Sync Pane will show during a synchronization and hide upon completion. Note that if **Show Sync Pane** was selected from the **Sync** button on the Outlook ribbon, the Sync Pane will not hide upon completion.

Feedback

To submit feedback for Colligo Email Manager:

1. Select **Options** from the Outlook ribbon.

2. Choose **Give Feedback** from the drop-down menu.