

Colligo Engage Outlook App 7.1

Connected Mode – Administrator's Guide



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About this Guide

This document provides guidance for your deployment of the Colligo Engage Outlook App. Prior to installation, please review the System Requirements which are available in the knowledge base article **System Requirements** (<https://www.colligo.com/support/colligo-engage-7/requirements-outlook>.)

Additional documentation is available at <https://www.colligo.com/support/documentation>.

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

Target Audience

This guide is intended for use by IT Administrators, technical evaluators, and deployment managers.

Overview

Colligo Engage Outlook App is an easy-to-deploy .NET client-only application; no server modifications are required. The installer package ranges from 40 – 60 MB in size. When installed, it consumes less than 20 MB of disk space, not including content. Colligo Engage Outlook App supports customized installations and can be deployed using your choice of deployment tools.

Colligo Engage Outlook App provides the following functionality:

- Filing of email and attachments to SharePoint sites through drag-and-drop or ribbon buttons
- Full metadata support for tagging email and attachments as they are being filed
- Simultaneous federated search of SharePoint sites and Outlook
- Sending links to attachments from SharePoint
- Browsing of SharePoint document libraries from within Outlook

SharePoint Security & Privileges

By using SharePoint's web services to access SharePoint data, Colligo Engage Outlook App respects all privileges defined on the site. Colligo Engage Outlook App supports most standard sign-on processes supported by SharePoint, including support for default credentials and other specified credentials. Passwords are stored in a secure manner using the Windows Cryptographic API.

The following authentication types are supported:

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

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

Colligo Technical Support

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

1. Colligo Knowledge Base: <https://www.colligo.com/support/knowledgebase>.
2. Colligo Support Community: <https://www.colligo.com/support/community>.
3. Colligo Online Support: <https://www.colligo.com/support/request>.
Submit a ticket online if you have current M&S or an active subscription.

Installing Colligo Engage Outlook App

There are two installers for Colligo Engage Outlook App. These are a .exe installer and a .msi installer.

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

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

EXE Installer

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

- Supports interactive install only (does not support silent install)
- Automatically installs software prerequisites
- Not customizable

Interactive EXE Install

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

1. Double-click the installation file.
2. Prerequisites are downloaded and installed.
3. Enter your license key.

Colligo Engage Outlook App can be set to launch at Windows Start Up. This enables the background synchronization to start automatically.

MSI Installer

The MSI installer package has the following key features:

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

Interactive MSI Install

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

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

Silent Install or Uninstall

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

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

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

For example:

```
msiexec /i ColligoEngage.msi /qn
```

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

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

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

An example batch file is listed below:

```
msiexec /i \\server\ColligoEngageInstall\PreReq\O2007PIA.MSI /qn  
\\server\ColligoEngage\PreReq\vstor.exe /q  
msiexec /i \\server\ColligoEngage\CustomColligoEngage.msi /qn
```

Disabling Colligo Engage Outlook App

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

Display Language

Colligo Engage Outlook App is available in English, French, German, and Spanish (Castilian and Latin American). If users have a French/German/Spanish version of Microsoft Office installed, Colligo Engage Outlook App displays in the same language; otherwise it displays in English.

Colligo Engage Console

If you are using the Colligo Engage Console during the installation you will enter in your license key and select the option that you do have a Colligo Engage Account. After installation you will be prompted for your Email Address and Password for Colligo Engage.

Upgrading to Colligo Engage Outlook App

The supported application upgrade paths are:

Products

Colligo Email Manager Connected Mode -> Colligo Engage Outlook App Connected Mode.

Versions

Version 5.X -> Version 7.0

Version 6.X -> Version 7.0

If you wish to upgrade from any other applications to Colligo Engage Outlook App Connected Mode you will need to uninstall and re-install. This includes any pilot or beta builds of the product that you may have been issued.

Upgrading from the Offline Mode of Colligo Email Manager to Colligo Engage Outlook App Connected Mode is not supported and if you wish to change modes you will need to uninstall and re-install the Colligo Engage Outlook App in Connected Mode.

To upgrade from Colligo Email Manager follow the steps outlined in the section Installing Colligo Engage Outlook App and the installation will recognize a previous version has been installed and perform an upgrade.

You will require a version 7 license key to install this application.

Editing the MSI

To edit the MSI installer package you need an MSI database editor.

Post-Install Configuration

Colligo Engage Outlook App saves settings in the registry. Many settings can be configured post-install by pushing out settings to the registry. A detailed list of settings is maintained on the Colligo website at <http://www.colligo.com/support/>

Overriding PST Policies

Some organizations have a policy that does not allow users to create or modify PSTs. If this is the case, the following key must be added to the registry in order to override the policy and allow users to file emails and attachments to SharePoint locations through Colligo Engage Outlook App:

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

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

Attachment Extraction

Some organizations will want to split out attachments from the original Email messages when they are uploaded using Colligo Engage. In order to enable this functionality, the following key must be added to the registry. With this enabled, when an email is uploaded to SharePoint any attachments will be extracted from the email and uploaded as individual items. The email and original attachments will then be given a unique Attachment ID in order for them to be referenced at a later date.

Key	/EmailManager
MSI	EXTRACT_ATTACHMENTS
Value Name	ExtractAttachments
Value Data	1
Value Type	String Value

In order to make the Attachment ID visible the Document Library needs to be configured with the following Column. This can be done directly on the Document Library or as part of a Content Type.

Column Name	Attachment ID
Type	Multi lines of Text

Editing the Registry

Registry settings may be stored under HKEY_LOCAL_MACHINE or HKEY_CURRENT_USER. Values are stored in:

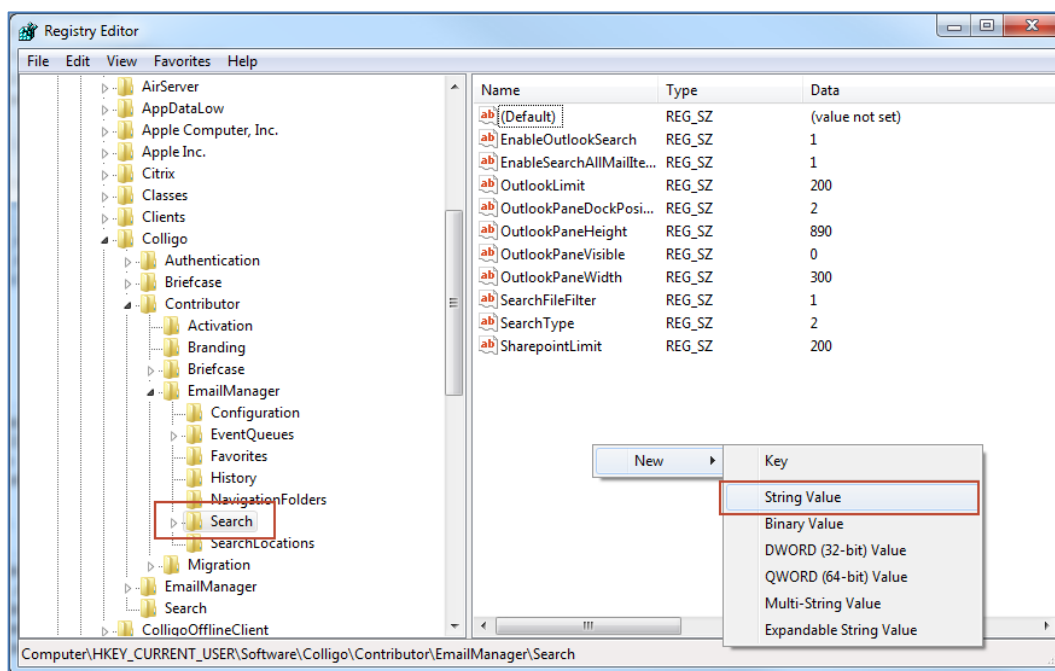
- HKEY_LOCAL_MACHINE\Software\Colligo\Contributor\
- HKEY_LOCAL_MACHINE\Software\Wow6432Node\Colligo\Contributor\
- HKEY_CURRENT_USER\Software\Colligo\Contributor\

Registry keys must be in the form of Key/String Value. To add a string value to a registry key:

1. Open the Registry Editor.
2. Navigate to the Key you want to add a new String Value to. For example, if the key is **EmailManager/Search/OutlookPaneVisible**, **Search** is the key and **OutlookPaneVisible** is the string value within the Outlook Key.

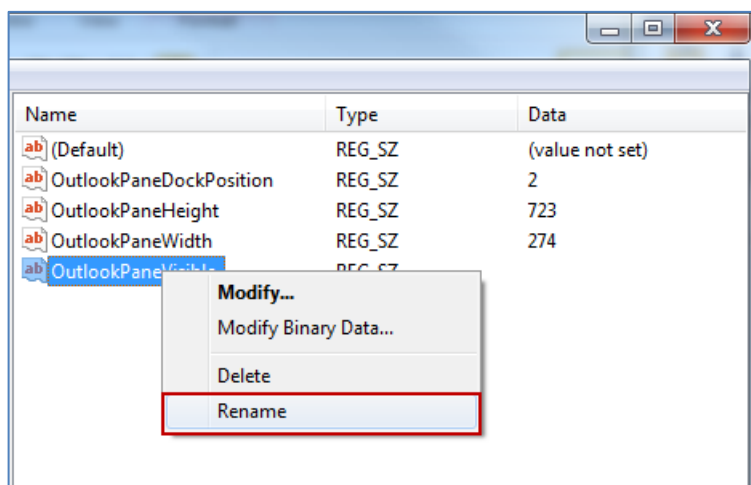
NOTE: If the key doesn't exist, you can create it by right clicking on the parent key and select **New Key** from the contextual menu.

3. Right-click on the right side and select **New > String Value** from the contextual menu:

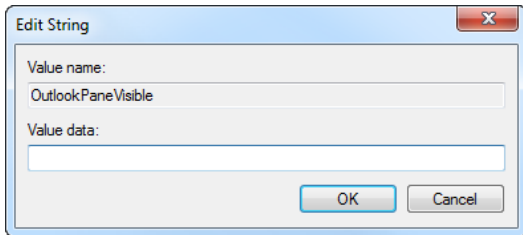


A new String Value appears in the **Name** list.

4. Enter the name of the String Value; in this example, it would be **OutlookPaneVisible**. To edit the name of the String Value, right click it and select **Rename** from the contextual menu:



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



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

Configuring SharePoint Libraries for Email Metadata

Colligo provides a sample list template file that can be used to create a sample testing document library. Download the template from the Colligo Engage Outlook App support site, install it to the List template gallery, and use it to create a new document library in your site.

Downloading the List Template

You can download the list template from the Knowledge Base article **How can I automatically map email message properties?** located at:

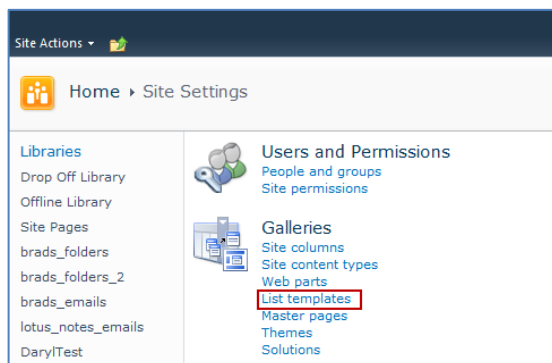
<https://community.colligo.com/entries/23002379>

Download the attachment *CfsEmailLibrary2010.zip*.

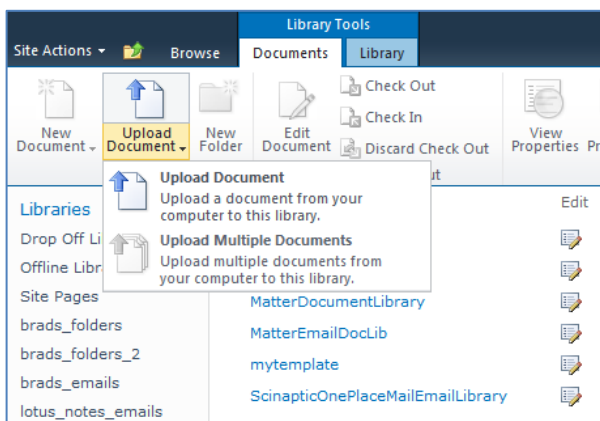
The zip file contains a site template named *CfsEmailLibrary2010.stp*.

Installing the Sample List Template

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

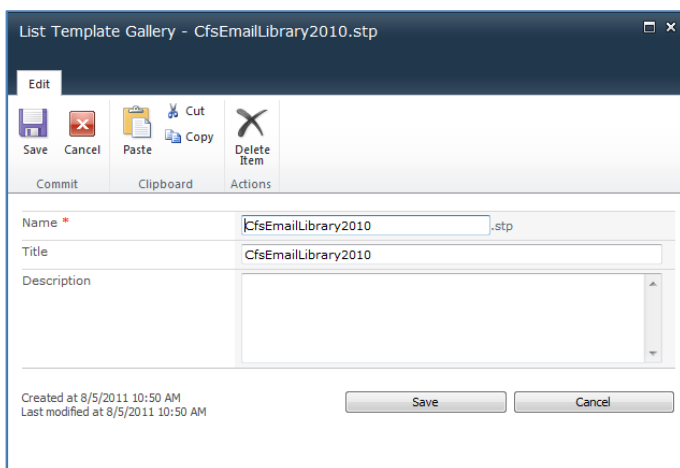


5. In the List Template Gallery, in the **Library Tools > Documents** ribbon, click **Upload Document**:



The **Upload Document** dialog displays.

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



7. Enter the following information:
 - a. **Name**: enter a name for the template gallery
 - b. **Title**: enter a title that reflects the use of the template gallery
 - c. **Description**: enter a description for the template gallery
8. Click **Save**.

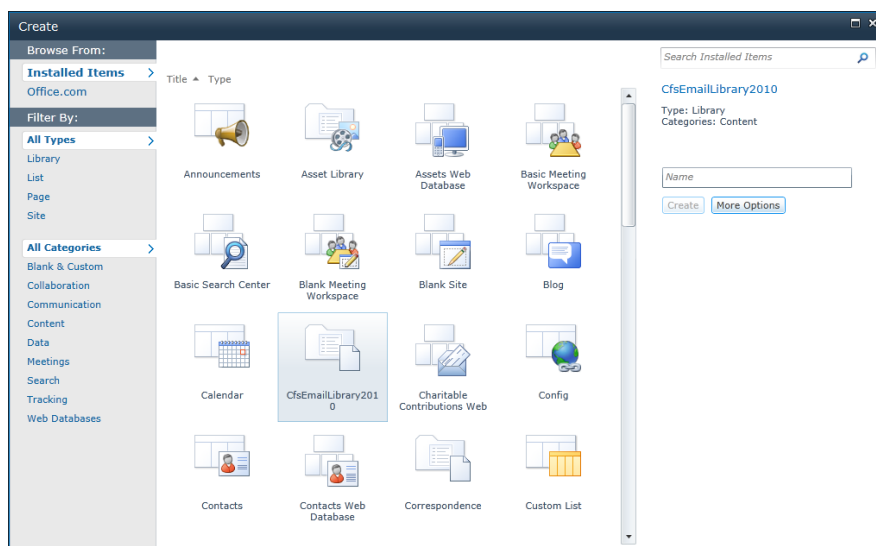
The new list template displays in the **List Template Gallery**.

Creating a Site

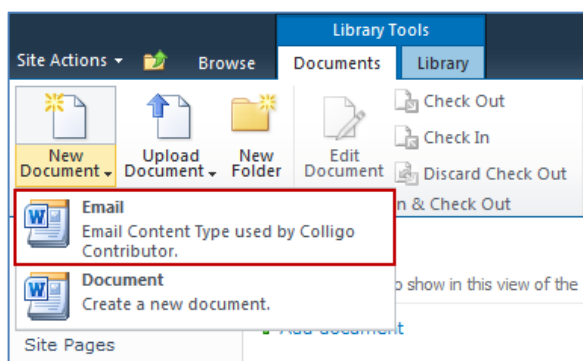
After you have installed the list template, you can create a new library based on the template.

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

The **Create** dialog displays.



3. Select the name of the list template you added.
NOTE: the name of the list template displays with the title you entered in step 7.b of Installing the Sample List Template:
4. In the right pane, enter a name for the library, and click **Create**.
5. Under the **Library Tools > Documents** ribbon, click the **New Document** drop-down arrow. The new Document Library displays as an option:



Manually Creating Content Types

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

Enabling Metadata Extraction

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

Colligo Engage Outlook App extracts the following metadata properties from emails:

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

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

Addresses can be in exchange or SMTP format.

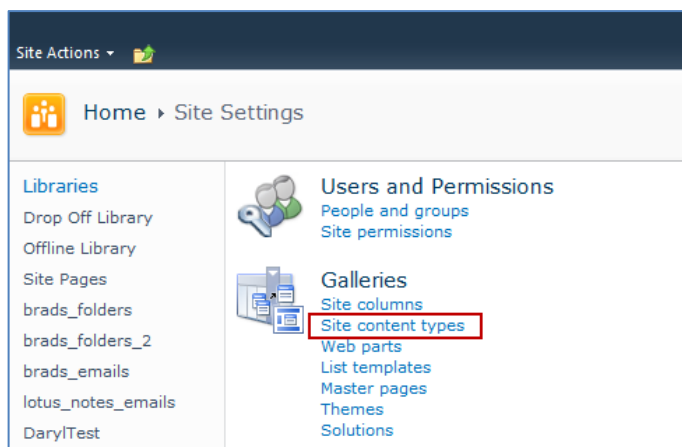
Metadata can be extracted into alternatively named columns. To extract metadata into non-default column names, see **Changing Column Mappings**.

NOTE: if you are creating a library for your email metadata to be extracted into, and you want your users to be able to search on field-specific metadata, you must then also configure each column to be searchable. For information on configuring columns for search, see **Adding Columns to SharePoint**.

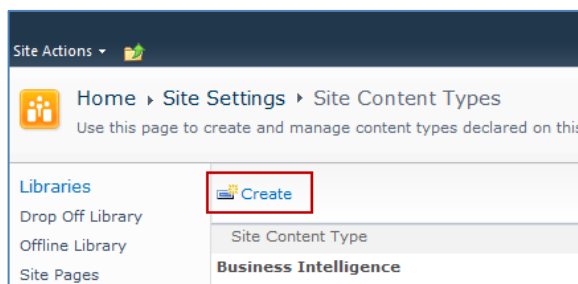
Adding a New Content Type to a Library

When creating an email content type, suitable SharePoint permissions are required. Typically, the email content type is created in the top level site within a site collection, allowing inheritance and customization in sub-sites.

1. In your document library, select **Site Actions** > **Site Settings**.
2. In the **Galleries** section, select **Site content types**:



3. In the **Site Content Types** page, click **Create**:



The **New Site Content Type** screen displays:

Site Actions ▾ Tessa MacKinnon ▾

Home ▸ Site Settings ▸ Site Content Types ▸ New Site Content Type

Use this page to create a new site content type. Settings on this content type are initially copied from the parent content type, and future updates to the parent may overwrite settings on this type.

Libraries

- Drop Off Library
- Offline Library
- Site Pages
- Email Document Library_new
- New Library

Lists

- Calendar
- Case

Name and Description

Type a name and description for this content type. The description will be shown on the new button.

Name:

Description:

Parent Content Type:

Select parent content type from:

Parent Content Type:

Description: Create a new document.

Group

Specify a site content type group. Categorizing content types into groups will make it easier for users to find them.

Put this site content type into:

☒ Existing group:

☐ New group:

OK Cancel

4. Enter the following information:
 - a. **Name and Description**
 - i. **Name:** enter a name for the content type
 - ii. **Description:** enter a description for the content type
 - iii. **Parent Content Type:** from the first drop-down list, select the parent content type group; in the second drop-down list, select the parent content type.
 - b. **Group:** choose if the content type is put into either:
 - i. **Existing group:** choose an existing content group from the drop-down menu
 - ii. **New group:** enter a name for a new content group
5. Click **OK**.
The content type is added.

Configuring a Content Type


After adding a content type, you can add existing site columns as well as create new site columns.

1. On the new content type page, click either:
 - a. **Add from existing site columns**
 - b. **Add from new site column**

Add Columns to Content Type:

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

New Site Column:

Site Actions  Tessa MacKinnon

Home > Site Settings > New Site Column

Use this page to add a site column.

Home Arne Test Gregor Test Valentina Test Andrew Test Eric Test Eve test Senior Management Braeden's Demo Site Susan Test
Jinks Kaczor Dyck LLC Guillaume Test OnePlaceMail Test Steve Test Colligo Social Committee Ben Henderson Special Column Test Bernard Test
BeeDub Test test_new_site TessaTest

Libraries



- Drop Off Library
- Offline Library
- Site Pages
- brads_folders
- brads_folders_2
- brads_emails
- lotus_notes_emails
- DarylITest
- DarylITest2
- Susan
- a new library
- Test
- Email Document
- Library_new
- New Library

Lists

- Calendar
- Case

Discussions

- Team Discussion

 Recycle Bin
 All Site Content

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- ☒ Single line of text
- ☐ Multiple lines of text
- ☐ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, ¥, €)
- ☐ Date and Time
- ☐ Lookup (information already on this site)
- ☐ Yes/No (check box)
- ☐ Person or Group
- ☐ Hyperlink or Picture
- ☐ Calculated (calculation based on other columns)
- ☐ 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
- ☐ Managed Metadata

Group

Specify a site column group. Categorizing columns into groups will make it easier for users to find them.

Put this site column into:

- ☒ Existing group:
- ☐ New group:

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

- ☐ Yes ☒ No

Maximum number of characters:

Default value:

- ☒ Text ☐ Calculated Value

Update List and Site Content Types

Specify whether all child site and list content types using this type should be updated with the settings on this page. This operation can take a long time, and any customizations made to these values on the child site and list content types will be lost.

Update all content types inheriting from this type?

- ☒ Yes ☐ No

[Column Validation](#)

OK Cancel

3. Enter the following information:
 - a. **Name and Type**
 - i. **Column name:** enter the column name
 - ii. Choose a type of information contained in the column
 - b. **Group:** choose if the column will belong to an existing group or a new one
 - c. **Additional Column Settings**
 - i. **Description:** enter a description for the column
 - ii. **Require that this column contains information:** choose **Yes** if you require this column to be a mandatory field the user must fill out

- iii. **Maximum number of characters:** enter the maximum number of characters you want to have in this column
- iv. **Default Value:** choose **Text** or **Calculated Value**
- d. **Update List and Site Content Types:** choose if you want to update all content types inheriting from this type

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

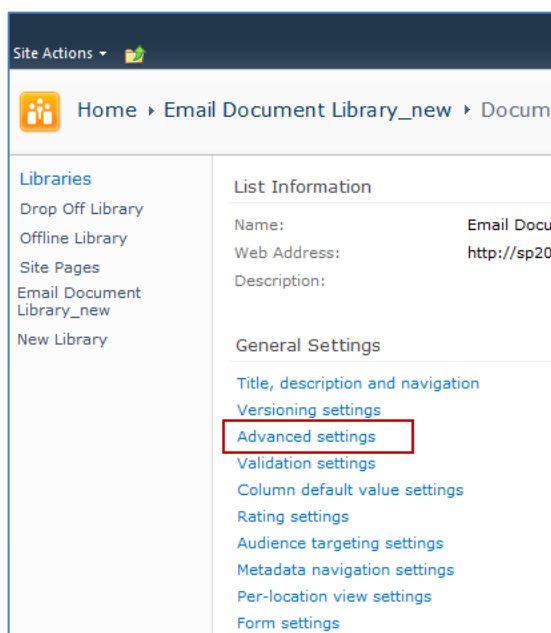
Hiding Columns

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

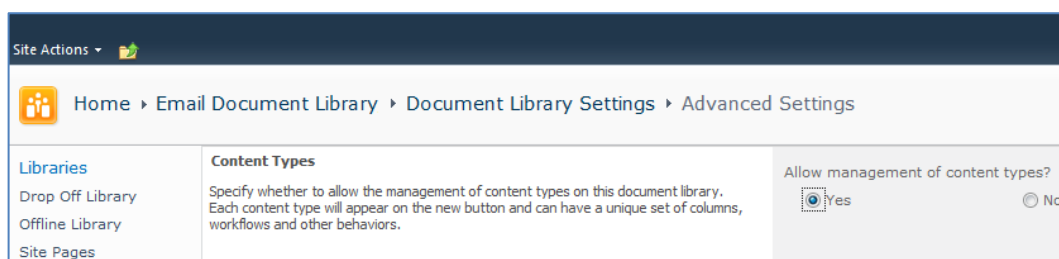
However, Colligo Engage Outlook App still extracts metadata into any hidden columns, and they can still be displayed in views, or used for filters.

Adding a New Content Type to Library

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



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



4. Click **OK** to save the changes and return to the Library Settings screen.

5. On the **Document Library Settings** screen, scroll down to the **Content Types** section:

Content Types		
This document library is configured to allow multiple content types. Use content types to specify the information you want to display about an item, in addition to its policies, workflows, or other behavior. The following content types are currently available in this library:		
Content Type	Visible on New Button	Default Content Type
Document	✓	
Add from existing site content types Change new button order and default content type		

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

The screenshot shows the 'Add Content Types' dialog box. On the left, under 'Select Content Types', there is a list of available site content types. 'Email' is selected. On the right, under 'Content types to add', there is an empty box. At the bottom, there are buttons for 'Add >', '< Remove', 'OK', and 'Cancel'.

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

Content Types		
This document library is configured to allow multiple content types. Use content types to specify the information you want to display about an item, in addition to its policies, workflows, or other behavior. The following content types are currently available in this library:		
Content Type	Visible on New Button	Default Content Type
Email	✓	✓
Document	✓	
Add from existing site content types Change new button order and default content type		

Creating a Library Without Content Types

If you do not wish to use content types in your SharePoint library, you can add columns directly to the library to enable email metadata mapping. See **Enabling Metadata Extraction** for the metadata fields and default column names.

1. In your document library, go to **Library Tools > Library** ribbon and click the **Library Settings** icon.
2. In the **Document Library Settings** screen, scroll down to the **Columns** section and click **Create Column**:

Column (click to edit)	Type	Required
Title	Single line of text	
Attachment	Yes/No	
Checked Out To	Person or Group	

[Create column](#)
[Add from existing site columns](#)
[Column ordering](#)
[Indexed columns](#)

The **Create Column** screen displays:

Site Actions ▾

Home > Email Document Library_new > Document Library Settings > Create Column

Use this page to add a column to this document library.

Libraries

- Drop Off Library
- Offline Library
- Site Pages
- Email Document Library_new
- New Library

Lists

- Calendar
- Case

Discussions

- Team Discussion

Recycle Bin

- All Site Content

Name and Type

Type a name for this column, and select the type of information you want to store in the column.

Column name:

The type of information in this column is:

- ☒ Single line of text
- ☐ Multiple lines of text
- ☐ Choice (menu to choose from)
- ☐ Number (1, 1.0, 100)
- ☐ Currency (\$, ¥, €)
- ☐ Date and Time
- ☐ Lookup (information already on this site)
- ☐ Yes/No (check box)
- ☐ Person or Group
- ☐ Hyperlink or Picture
- ☐ Calculated (calculation based on other columns)
- ☐ External Data
- ☐ Managed Metadata

Additional Column Settings

Specify detailed options for the type of information you selected.

Description:

Require that this column contains information:

☐ Yes ☒ No

Enforce unique values:

☐ Yes ☒ No

Maximum number of characters:

255

Default value:

☒ Text ☐ Calculated Value

☒ Add to default view

Column Validation

OK Cancel

3. Enter the following information:
 - a. **Name and Type**
 - i. **Column name:** enter the column name
 - ii. Choose a type of information contained in the column
 - b. **Additional Column Settings**
 - i. **Description:** enter a description for the column
 - ii. **Require that this column contains information:** choose **Yes** if you require this column to be a mandatory field the user must fill out
 - iii. **Enforce unique values:** choose Yes if you want this column to have a unique value
 - iv. **Maximum number of characters:** enter the maximum number of characters you want to have in this column
 - v. **Default Value:** choose **Text** or **Calculated Value**
 - vi. **Add to default view:** check this box if you want this column to display in the default view

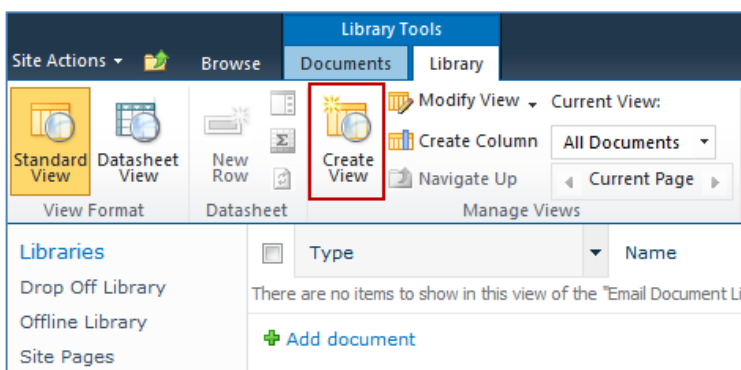
4. Click **OK**.

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

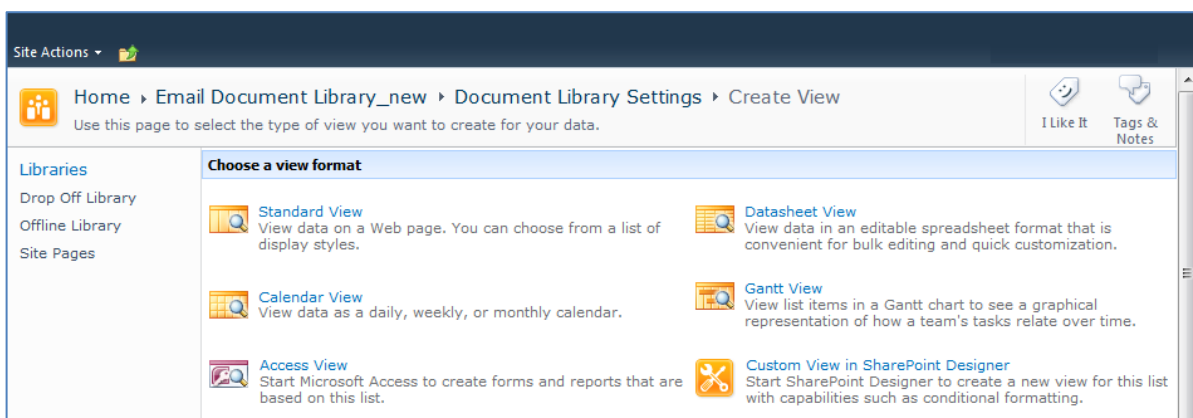
Creating an Email View

After you have defined your content type and added it to your library, it is recommended that you create an email view.

1. In your document library, go to **Library Tools > Library** ribbon and click the **Create View** icon:






The **Create View** screen displays:



2. Click the **Standard View** link.

The configuration options for the standard view display:

Site Actions 

Home > Email Document Library_new > Document Library Settings > Create View  

Use this page to create a view of this document library.

OK Cancel

Libraries

- Drop Off Library
- Offline Library
- Site Pages
- Email Document Library_new
- New Library

Lists

- Calendar
- Case

Name

Type a name for this view of the document library. Make the name descriptive, such as "Sorted by Author", so that site visitors will know what to expect when they click this link.

Audience

Select the option that represents the intended audience for this view.

Columns

Select or clear the check box next to each column you want to show or hide in this view of this page. To specify the order of the columns, select a number in the **Position from left** box.

Sort

Select up to two columns to determine the order in which the items in the view are displayed. [Learn about sorting items.](#)

Filter

Show all of the items in this view, or display a subset of the items by using filters. To filter on a column based on the current date or the current user of the site, type **[Today]** or **[Me]** as the column value. Use indexed columns in the first clause in order to speed up your view. Filters are particularly important for lists containing 5,000 or more items because they allow you to work with large lists more efficiently. [Learn about filtering items.](#)

Inline Editing

Tabular View

Group By

Totals

Style

Folders

Item Limit

Mobile

Adjust mobile settings for this view.

View Name:

☐ Make this the default view
(Applies to public views only)

View Audience:


☐ Create a Personal View
Personal views are intended for your use only.


☒ Create a Public View
Public views can be visited by anyone using the site.

Display	Column Name	Position from Left
<input checked="" type="checkbox"/>	Type (icon linked to document)	1
<input checked="" type="checkbox"/>	Name (linked to document with edit menu)	2
<input checked="" type="checkbox"/>	Modified	3
<input checked="" type="checkbox"/>	Modified By	4

First sort by the column:


None


☒  Show items in ascending order
(A, B, C, or 1, 2, 3)

☐  Show items in descending order
(C, B, A, or 3, 2, 1)


Then sort by the column:


None

☒  Show items in ascending order
(A, B, C, or 1, 2, 3)

☐  Show items in descending order
(C, B, A, or 3, 2, 1)

☐ Sort only by specified criteria (folders may not appear before items).

☒  Show all items in this view

☐  Show items only when the following is true:

Show the items when column

None

is equal to

☐ And ☒ Or

When column

None

is equal to

[Show More Columns...](#)

☒ Enable this view for mobile access
(Applies to public views only)

☐ Make this view the default view for mobile access
(Applies to public views only)

Number of items to display in list view web part for this view:

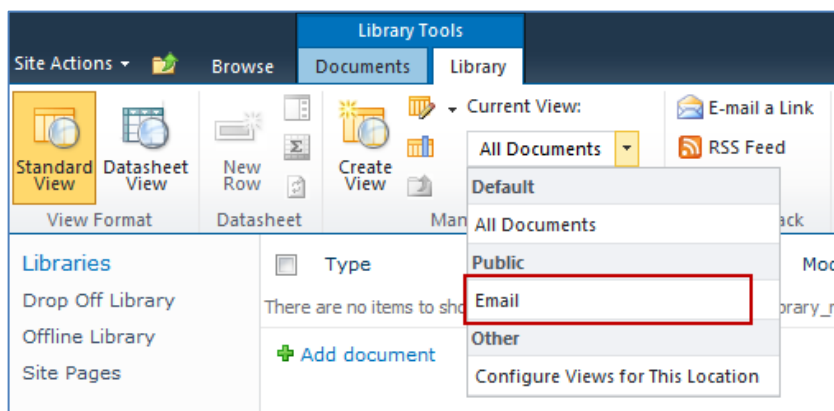
3

Field to display in mobile list simple view:

Name (linked to document with edit menu)

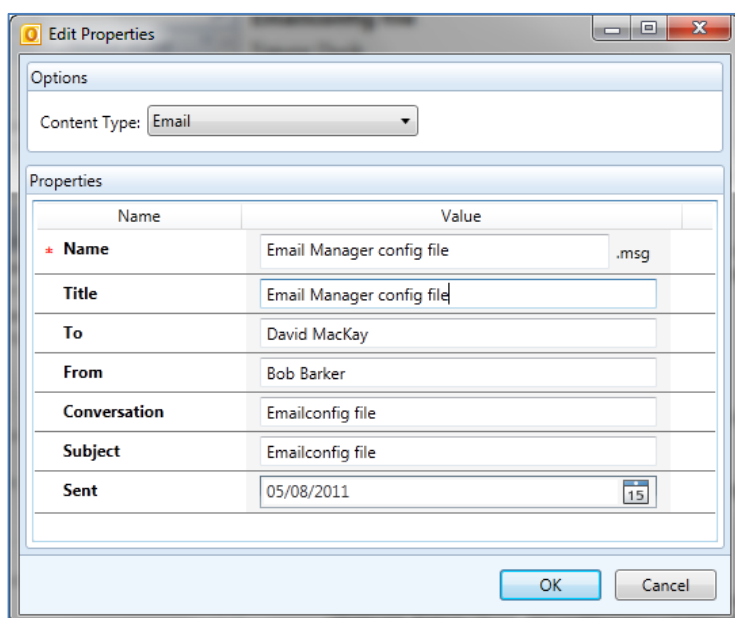
OK Cancel

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



Validating Metadata Extraction

To validate that your metadata is being extracted correctly, drag-and-drop an email into a Favorite or Folder location (refer to the Colligo Engage Outlook App User Guide for details), and check that the correct metadata is being displayed and extracted in the **Edit Properties** dialog:



Changing Column Mappings

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

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

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

Windows Vista/7:

- C:\Users\%username%\AppData\Roaming\ColligoOfflineClient\Config\
- C:\Users\%username%\AppData\Local\ColligoOfflineClient\Config\

Windows XP:

- C:\Documents and Settings\%username%\Local Settings\Application Data\ColligoOfflineClient\Config\
- C:\Documents and Settings\%username%\ApplicationData\ColligoOfflineClient\Config\

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

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

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

Activation and Licensing

Colligo Engage Outlook App is normally licensed on a per user / per machine basis and the activation system is used to enable and authorize client installation. Each Colligo Engage Outlook App client performs an activation request to the Colligo Activation servers to gain the necessary authorization for execution. The results of this activation are recorded in a special file that is stored in the installation area of Colligo Engage Outlook App.

In a remote desktop server environment, where the user profile and storage may be located on network storage or may be created on demand, this activation file may not be maintained between sessions leading to unnecessary and repeated activation requests.

There are special license keys available for use with a remote desktop server environment that eliminates this activation request traffic. For further information contact Colligo Sales at sales@colligo.com.

Virtualization and Hot Desking

Colligo Engage Outlook App supports Citrix XenDesktop and Windows Remote Desktop (RDP) for multi-user, multi-session scenarios. A separate license is required.

In a multi-user, multi-session environment, Colligo recommends that you use the STORAGE_ROOT MSI property or registry key to define an alternative storage location for Outlook's PST folder so there is no conflict when a user logs in to multiple locations. Using this property allows the Administrator to define where the PST should be stored and should prevent any issues with users accessing the same PST file from Outlook.

This property can use merge fields, which have two parts: the literal string "Environment" and the environment variable name. For example, the merge field [EnvironmentCOMPUTERNAME] will be replaced by the value of the COMPUTERNAME. You could use property to point to a location that is specific to the machine's physical location, rather than a single network location.

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

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

Communications

Colligo Engage Windows App communicates with SharePoint through the web services, the details of which are available on MSDN at:

<http://msdn2.microsoft.com/en-us/library/aa979690.aspx>.

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

Details of the FrontPage RPC protocols are available on MSDN at:

<http://msdn2.microsoft.com/en-us/library/ms954084.aspx>.

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

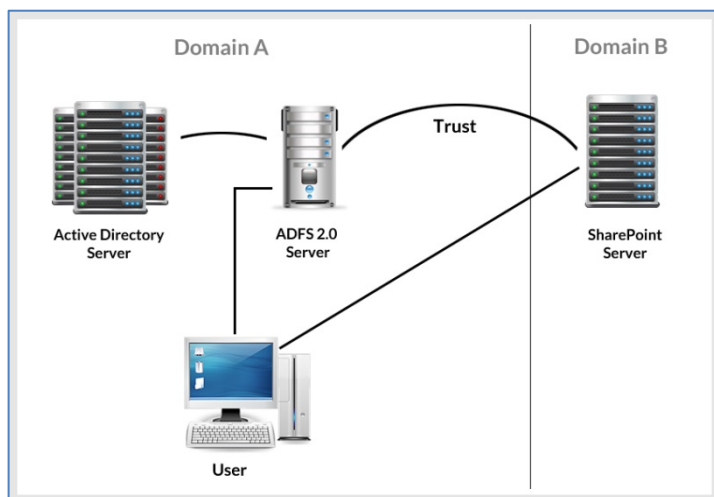
White Labeling

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

Support for AD FS

Colligo Engage Outlook App supports AD FS 2.0 and 3.0 (Active Directory Federation Service) authentication.

The infrastructure of the client machine, SharePoint Server, and AD FS 2.0 Server is illustrated below:



The workflow of the above infrastructure is as follows:

1. The user on client machine attempts to contact the SharePoint Server.
2. The SharePoint server denies the attempt, sending a message back to the client machine.
3. The client machine then attempts to connect to the AD FS 2.0 Server, which verifies the user's identity, and sends a token back to the client machine.
4. The token is then sent to the SharePoint Server, which has an inherent trust connection established with the AD FS 2.0 Server (configured during set up).
5. The connection to the SharePoint Server is successful.

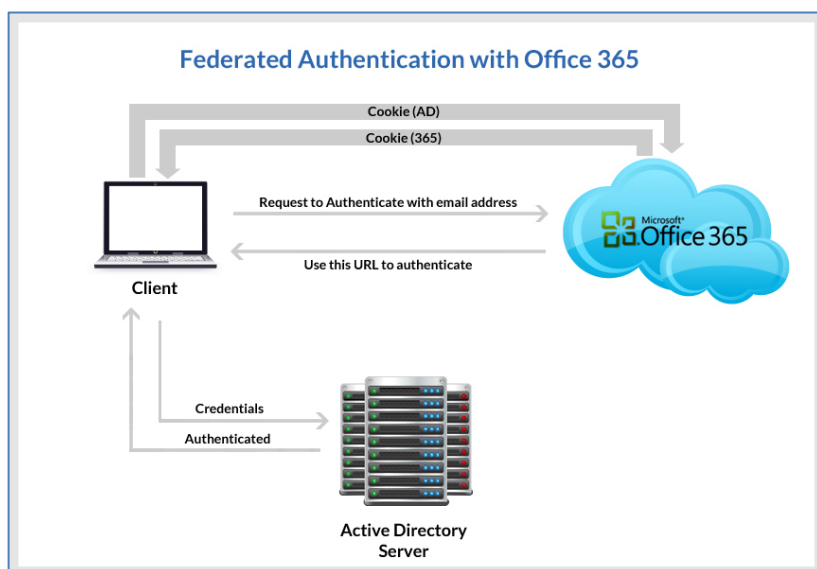
NOTE: Configuration settings for AD FS 2.0 or 3.0 can be found on our website:

<http://www.colligo.com/support/setting/adfs/>

Federation with Office 365 Sites

Colligo Engage Outlook App supports federated authentication to Office 365 through AD FS 2.0.

The following diagram illustrates how Colligo Engage Outlook App federates with Office 365 sites:



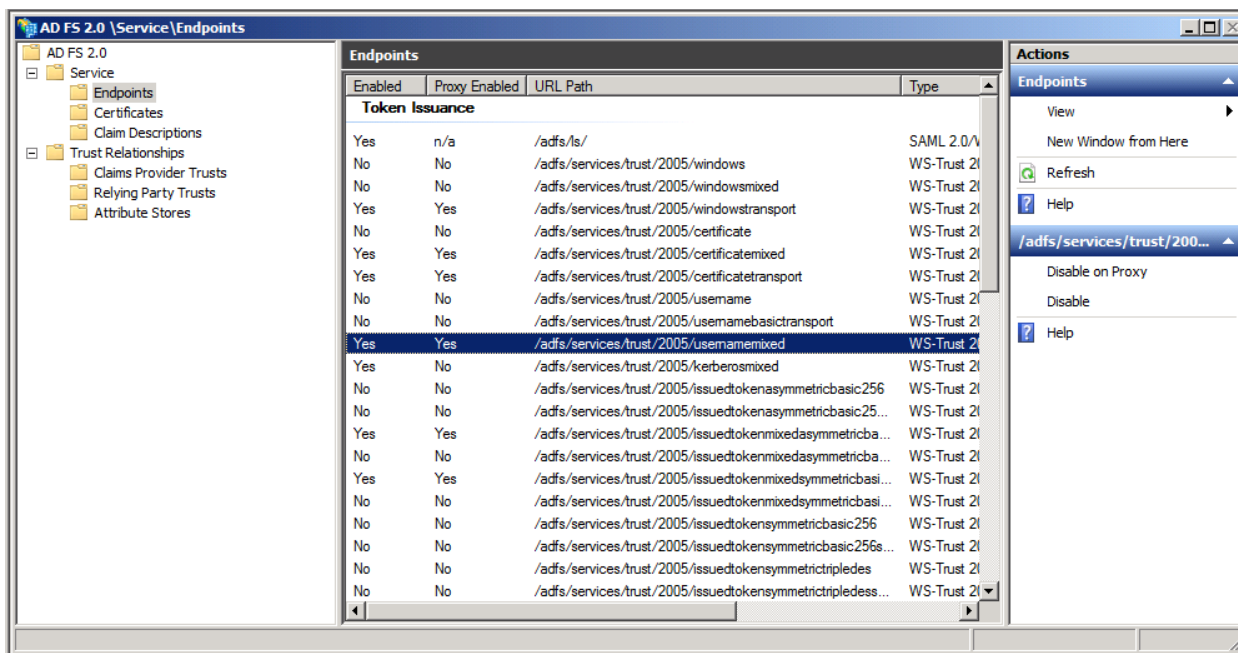
The workflow of the above infrastructure is as follows:

1. User sends request to Office 365 site using an email address.
2. Depending on the email address used to log in, it either manages the login on Office 365 (Managed Credentials) or re-direct back to the user with a URL (federated).
3. Colligo Engage Outlook App authenticates the redirected URL, which points to an Active Directory server.
4. Active Directory returns a token to the user.
5. The user re-submits the token as the authentication to the Office365 site.
6. The token is accepted by Office 365 and the user receives a secondary token for future communication with Office365.

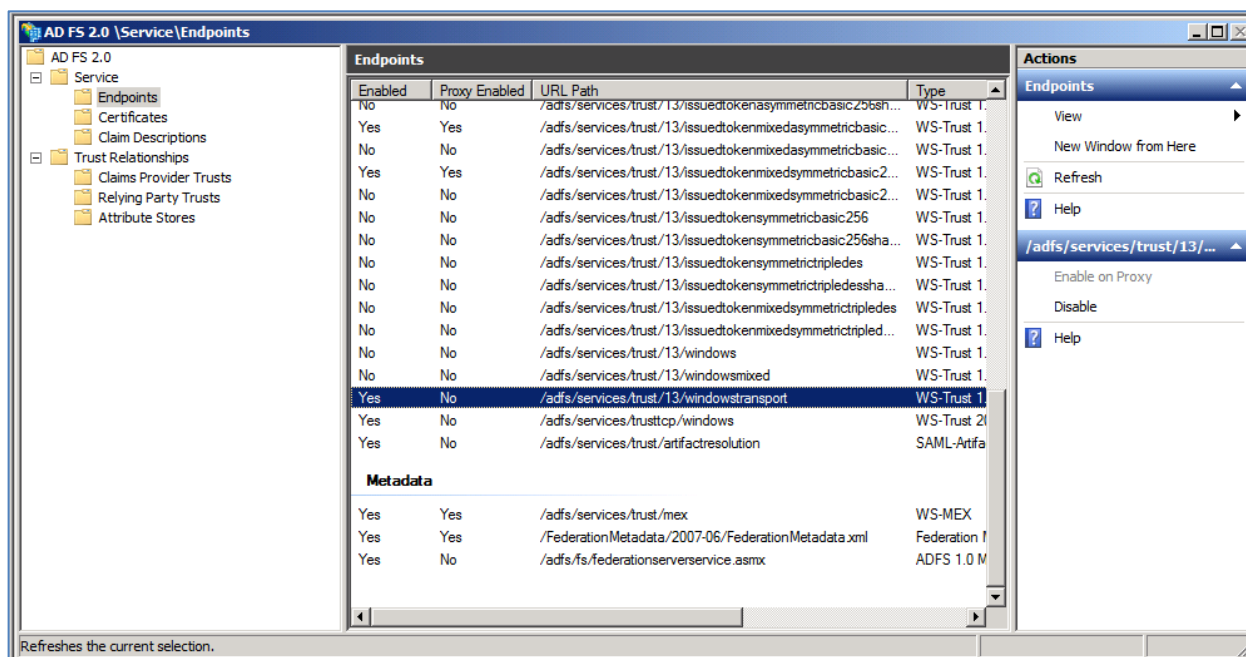
Enabling Authentication Service Endpoint

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

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



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

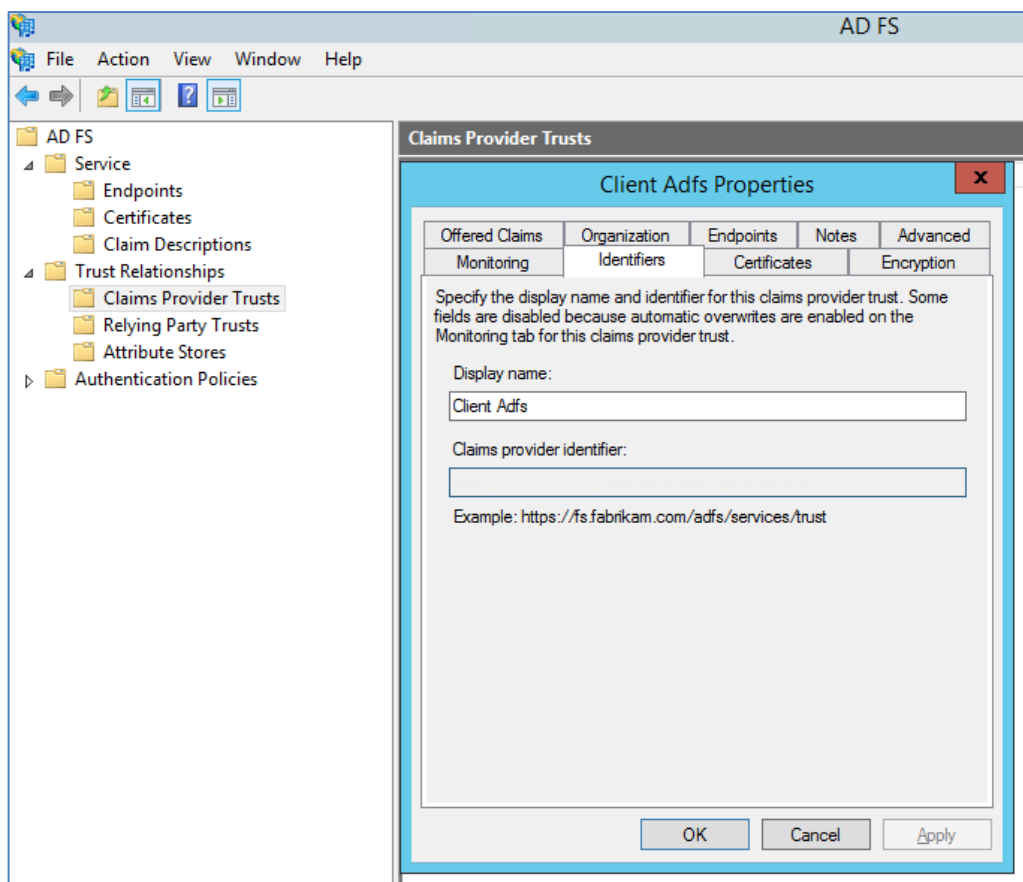


After your AD FS 2.0 server is configured, you need to deploy the following registry key to your users:

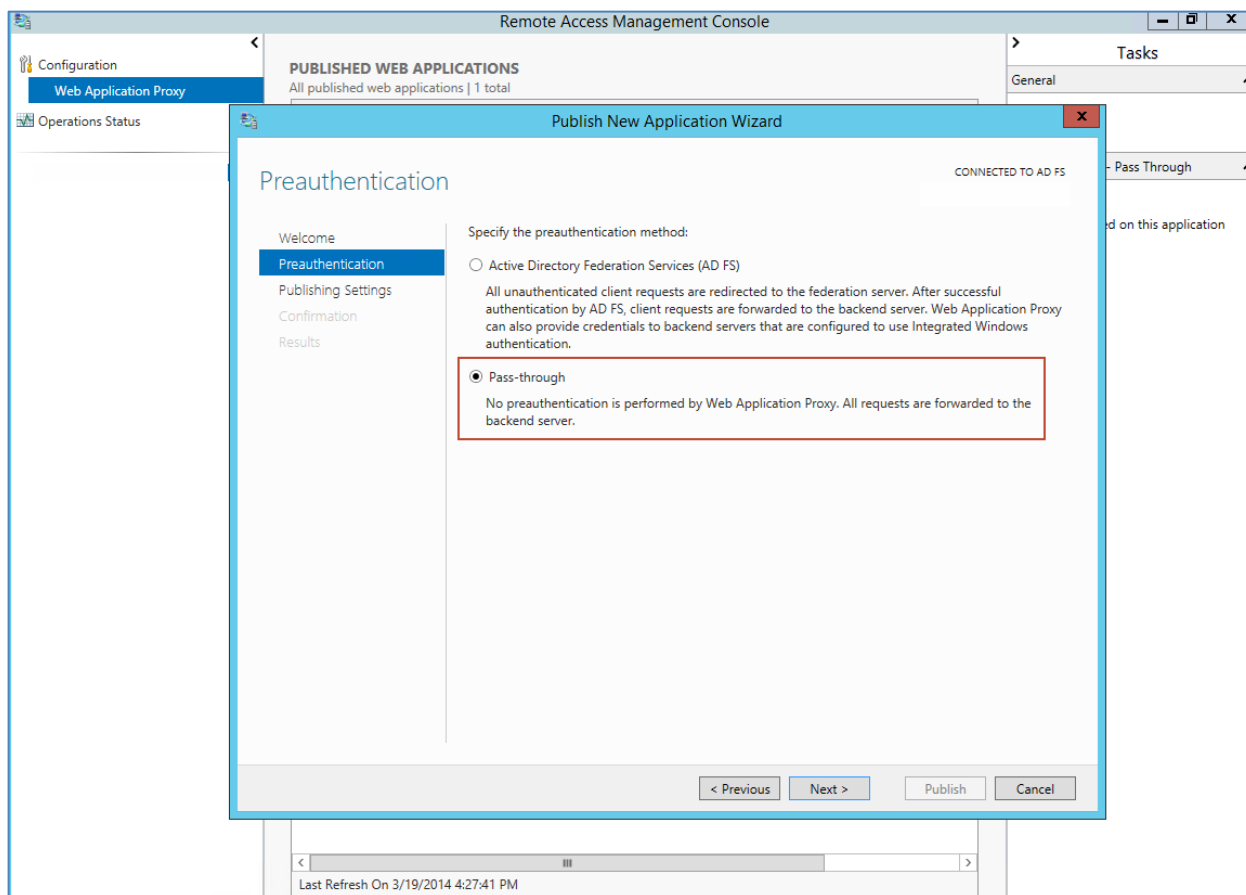
Key	HKEY_CURRENT_USER\Software\ Colligo \Contributor\Authentication\Adfs
Value Name	<AD FS2.0 display name – for display purposes only>
Value Data	<AD FS 2.0 Server name: e.g. https://adfs.mycompany.com > < AD FS 2.0 realm for SharePoint server e.g. urn:sharepointsvradfs:sharepoint>
Value Type	String

Server Requirements for AD FS 3.0

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



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

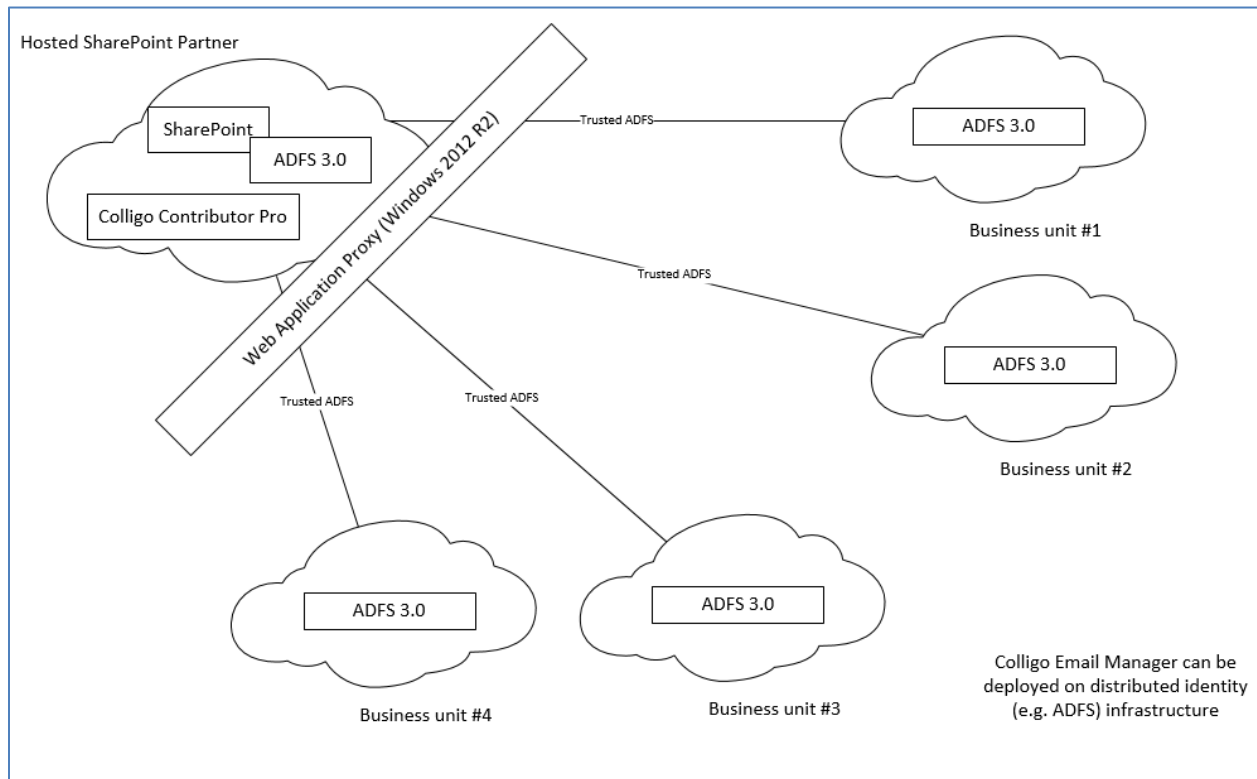


After your AD FS 3.0 server is configured, you need to deploy the following registry key to your users:

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

Distributed Identity Management

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



Metadata

Colligo Engage Outlook App prompts users to enter metadata when they upload content. The process helps maintain SharePoint metadata and drives user adoption by simplifying the process of entering metadata. You can enable or disable this functionality. (See **Post-Install Configuration**.)

Colligo Engage Outlook App automatically extracts 22 metadata properties from email messages that are filed to SharePoint, and adds those properties to appropriate columns in SharePoint. This allows filed email to be easily found at a later time.

Hiding Metadata Fields

When configuring your document libraries in SharePoint, you can choose to hide certain columns so data can be extracted into them but not be seen by the user.

If you want to have a more flexible way to hide specific metadata fields in the **Edit Properties** dialog in Colligo Engage Outlook App post-install, you can use the following registry key and values:

Key	HKEY_LOCAL_MACHINE\Software\Colligo\Contributor\EmailManager\HiddenMetadataFields
Value Name	Global
Value Data	Column name Column name Column name
Value Type	String

NOTE: this feature hides the metadata fields in Colligo Engage Outlook App only; they are still visible in SharePoint.

In the **Value Data** field, enter the name of the SharePoint column(s) you want to hide from users in the metadata prompt. You can use either the display name or the internal name. If you want to enter multiple column names, use the pipe character (|) to separate the fields.

NOTE: there can be no spaces between the pipe character (|) and the field name.

Configuring Search

Colligo Engage Outlook App is compatible with SharePoint Foundation 2010, SharePoint Enterprise 2010, and SharePoint Enterprise 2010 with FAST Search Server 2010, SharePoint Foundation 2013, and SharePoint Server 2013.

Depending on which version of SharePoint you are using, Colligo Engage Outlook App provides the ability to search on SharePoint properties. For example, users may want to search on email properties such as “To”, “From” and “Subject.” To enable this functionality, SharePoint must be configured to crawl the columns that you would like to allow users to search on.

A keyword search means that your results could include results from the text of a document or properties.

The following table details which versions of SharePoint support which aspects of search:

SharePoint Version	Keyword Search	Properties Search
SharePoint Foundation 2010	✓	
SharePoint Server 2010	✓	✓
SharePoint Server 2010 and FAST 2010	✓	✓
SharePoint Foundation 2013	✓	
SharePoint Server 2013	✓	
SharePoint Server 2010 & SharePoint 2013 Search	✓	

NOTE: If you are using SharePoint Foundation, you cannot search on specific SharePoint metadata such as To or From. However, you may get results that include instances of your search term as a property value in a column. To use property based search, use the syntax “property:value”, for example “subject:colligo”.

To install FAST, follow the instructions at the following location:

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

The following procedures comprise Colligo’s best practice approach for setting up search for your SharePoint sites:

1. Add any SharePoint columns you want to be searched: see **Adding Columns to SharePoint**.
2. Add your content sources and crawl them: see **Adding a Content Source**.
3. Add managed property mappings: see **Adding Managed Property Mappings**.
4. Enable the isDocument property: see **Enabling the IsDocument Property**.

Adding Columns to SharePoint

You likely have already set up various columns for your document libraries in SharePoint. Ensure that you have all the properties that you want to be searchable added as a column.

To add columns to SharePoint:

1. In an existing SharePoint site, go to **Library Settings**.
2. Under the **Columns** section, choose **Create Column**.
3. Add a column for every field that you want to be searchable.

NOTE: create columns with lower case names with no special characters or white spaces. This file naming convention allows you to use the same FAST Search mapping property names as site column names.

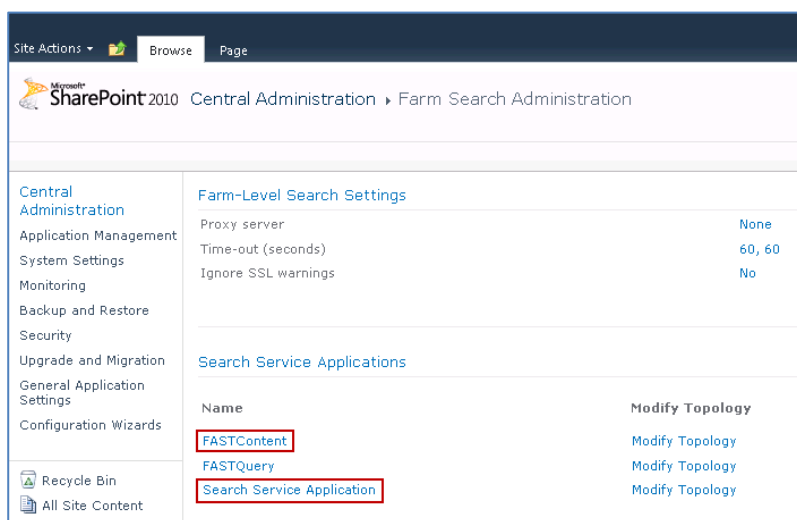
4. Upload at least one document to the library with each metadata column filled out in order for the search crawler to register any new columns.

Adding a Content Source

A content source is a SharePoint site containing the document libraries that you want to search. You can add multiple content sources if you have sites on different Farms.

To add a content source:

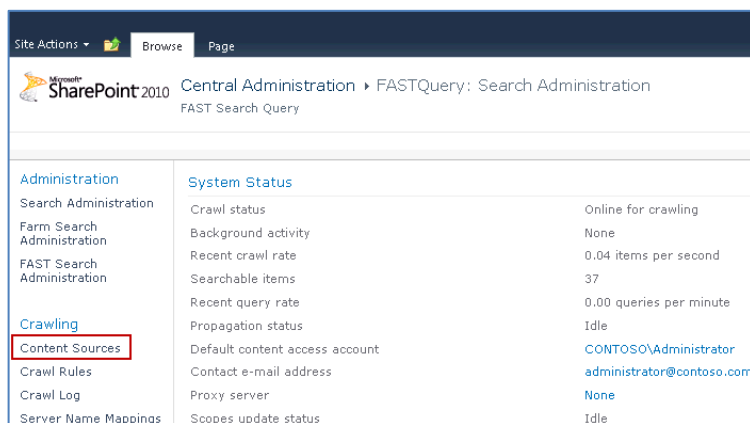
1. In SharePoint's **Central Administration**, go to **General Application Settings > Farm Search Administration**.
2. Depending on whether or not you are using FAST Search, choose one of the following options:
 - a. If you are using FAST Search, click **FASTContent**.
The **FASTQuery: Search Administration**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



If you are using FAST Search, the **FASTQuery: Search Administration** page displays.

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

3. In the **Crawling** section, click **Content Sources**.



If you are using FAST Search, the **FASTContent: Manage Content Sources** page displays.

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

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

SharePoint 2010 Central Administration » FASTContent: Manage Content Sources

Use this page to add, edit, or delete content sources, and to manage crawls.

Administration
 Search Administration
 Farm Search Administration


Crawling
 Content Sources
 Crawling Rules
 Crawling Log
 Server Name Mappings
 Host Distribution Rules




[New Content Source](#) [Refresh](#) [Start all crawls](#) [Stop all crawls](#) [Pause all crawls](#)

Type	Name	Status	Current crawl duration	Last crawl duration	Last crawl completed	Next Full Crawl
FAST	Contoso	Idle		00:01:50	3/16/2011 4:57 PM	None
FAST	BradsTest	Crawling Incremental	2850:12:22			7/30/2011 12:00 AM

If you are using FAST Search, the **FASTContent: Add Content Source** page displays.

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

Site Actions 

Microsoft **SharePoint 2010** Central Administration ▶ FASTContent: Add Content Source   I Like It Tags & Notes 

Administration

Search Administration

Farm Search Administration

Crawling

Content Sources

Crawl Rules

Crawl Log

Server Name Mappings

Host Distribution Rules

File Types

Index Reset

Crawler Impact Rules

Reports

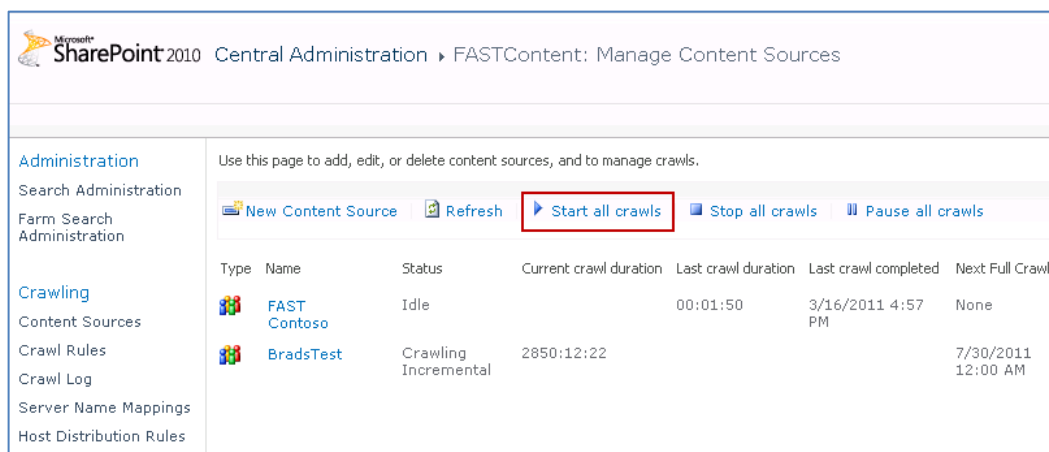
Administration Reports

Use this page to add a content source.

* Indicates a required field

Name	Name: *
Type a name to describe this content source.	<input type="text"/>
Content Source Type	<p>Select the type of content to be crawled:</p> <p><input checked="" type="radio"/> SharePoint Sites</p> <p><input type="radio"/> Web Sites</p> <p><input type="radio"/> File Shares</p> <p><input type="radio"/> Exchange Public Folders</p> <p><input type="radio"/> Line of Business Data</p> <p><input type="radio"/> Custom Repository</p>
<p>Start Addresses</p> <p>Type the URLs from which the search system should start crawling.</p> <p>This includes all SharePoint Server sites and Microsoft SharePoint Foundation sites.</p>	<p>Type start addresses below (one per line): *</p> <div><input type="text"/></div> <p>Example: http://intranetsite</p>
<p>Crawl Settings</p> <p>Specify the behavior for crawling this type of content.</p> <p>Selecting to crawl everything under the hostname will also crawl all the SharePoint Sites in the server.</p> <p>Caution: After you select crawl settings for a SharePoint content source, you cannot change crawling behavior unless you re-create the content source. Verify that you select the option that best suits your needs.</p>	<p>Select crawling behavior for all start addresses in this content source:</p> <p><input checked="" type="radio"/> Crawl everything under the hostname for each start address</p> <p><input type="radio"/> Only crawl the Site Collection of each start address</p>
<p>Crawl Schedules</p> <p>Select the crawl schedules for this content source.</p>	<p>Select the schedule that this should be a part of:</p> <p>Full Crawl <input type="text" value="None"/> Create schedule</p> <p>Incremental Crawl <input type="text" value="None"/> Create schedule</p>
<p>Content Source Priority</p> <p>Select what the priority of this content source should be. The Crawl system will prioritize the processing of 'high' priority content sources over 'Normal' priority content sources</p>	<p>Select the priority for this content source:</p> <p>Priority <input type="text" value="Normal"/></p>
<p>Start Full Crawl</p> <p>Select "Start full crawl of this content source" and click "OK" to start a full crawl of this content source.</p>	<p><input type="checkbox"/> Start full crawl of this content source</p>

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



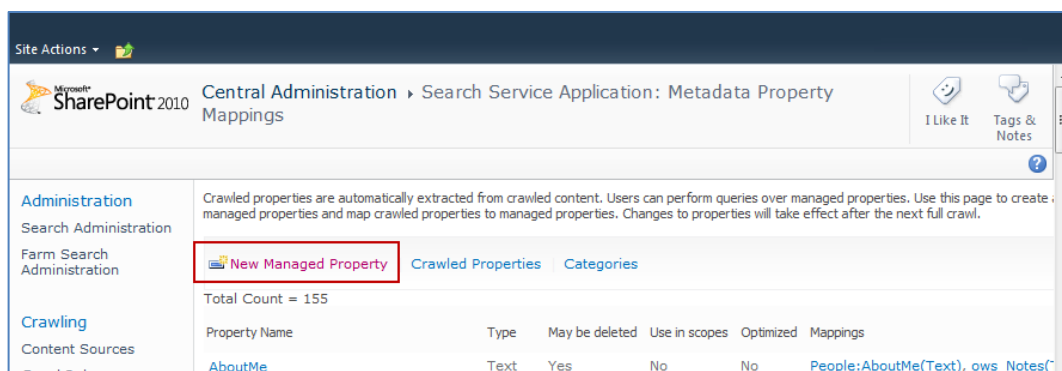
- Wait until all crawls are completed.
- Return to **Central Administration** and navigate to **General Application Settings > Farm Search Administration** to add managed property mappings.

Adding Managed Property Mappings

A managed property mapping provides the link between the SharePoint column and the search term. For example, if you want to search on the email property To, this is where you determine which SharePoint columns are searched when you enter that search term. You could have multiple SharePoint sites that each contain some form of a “To” column but they might be named slightly differently. This mapping allows you to map the “To” search term to any or all of those columns.

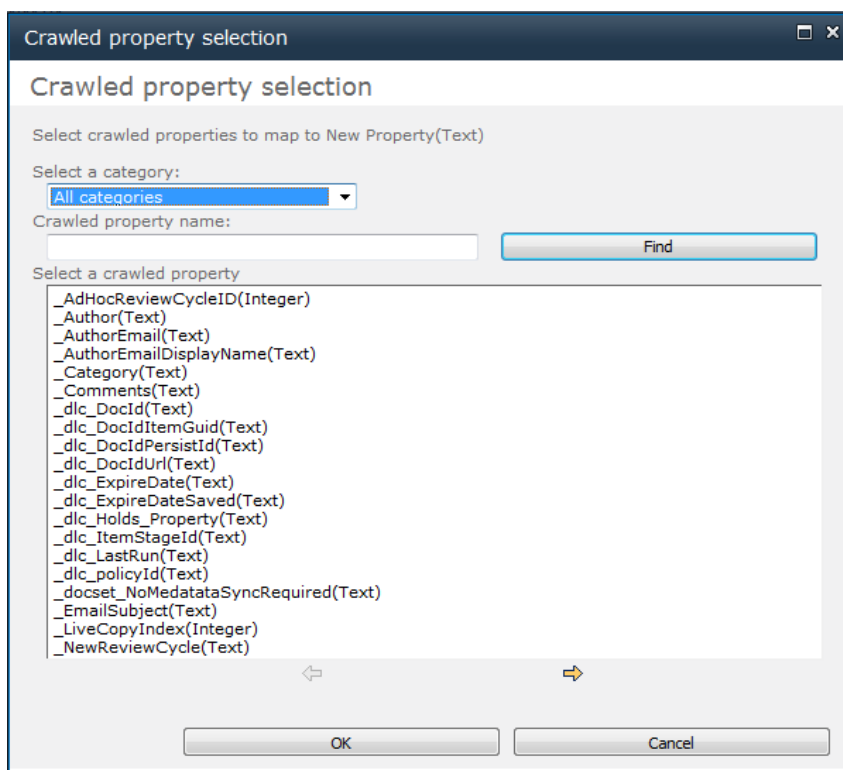
To add a new managed property mapping:

- In SharePoint’s **Central Administration**, go to **General Application Settings > Farm Search Administration**.
- If you are using FAST Search:
 - Click **FastQuery**.
The **FASTQuery: Search Administration** page displays.
 - In the **Queries and Results** section, click **Metadata Properties**.
The **FASTQuery: Metadata Property Mappings** page displays.
- If you are not using FAST Search:
 - Click **Search Service Application**.
The **Search Service Application: Search Administration** page displays.
 - In the **Queries and Results** section, click **Metadata Properties**.
The **Search Service Application: Metadata Property Mappings** page displays.
- Click **New Managed Property**.



The New Managed Property screen displays:

5. Fill out the following fields:
 - a. **Property name:** ensure the name is unique, has no spaces and is all lower case with no spaces or special characters
 - b. **Type:** choose the appropriate type
 - c. **Mappings to crawled properties:** click **Add Mapping**
- The **Crawled property selection** screen displays:



- i. Use the **Select a category** drop-down to filter the available properties, or enter a property in the **Crawled property name** field and click **Find**.
 - ii. Select a crawled property from the list and click **OK** to add it to the mapping.
 - iii. In the **Available crawled properties** list and click **Add** to move it to the **Selected crawled properties** list in the **New Managed Property** page.
 - iv. Repeat for each column you want to make available on a search query.
6. Click **OK**.

Enabling the Attachment Property in Search

If an email has an attachment, you can configure a managed property mapping for the attachment icon to display in the search results. Because this is not a property you can actually search on, the mapping is slightly different for this field.

Below is the Property name and the mapping you need to add to your crawled properties for the Attachment column:

The screenshot shows the 'Edit Managed Property' page in SharePoint 2010 Central Administration. The page title is 'Central Administration > Search Service Application: Edit Managed Property - attachment'. The left sidebar contains navigation links for Administration, Crawling, Queries and Results, and Reports. The main content area is divided into several sections:

- Name and type:** The 'Property name' field is set to 'attachment'. The 'Description' field is empty. The 'The type of information in this property' is set to 'Yes/No'. The 'Has Multiple Values' checkbox is unchecked.
- Mappings to crawled properties:** The 'Include values from all crawled properties mapped' radio button is selected. The 'Crawled properties mapped to this managed property:' list contains 'ows_Attachment(Yes/No)'. To the right of the list are buttons for 'Move Up', 'Move Down', 'Add Mapping', and 'Remove Mapping'.
- Use in scopes:** The 'Allow this property to be used in scopes' checkbox is checked.
- Optimize managed property storage:** The 'Reduce storage requirements for text properties by using a hash for comparison' checkbox is checked. The 'Add managed property to custom results set retrieved on each query' checkbox is unchecked.

At the bottom of the page are three buttons: 'Delete', 'OK', and 'Cancel'.

NOTE: this property is not retroactive; ie. If the column and property mapping are added after emails with attachments have been uploaded to the document library, the attachment icon will not display in the search results. The column and property mapping must be present at the time of upload to be applied.

Enabling the IsDocument Property

The IsDocument property is a SharePoint property that must be set to **True** for all document types that you want to include in a search. If this property is not set to True, no results will be returned in your search.

1. In SharePoint's **Central Administration**, go to **General Application Settings > Farm Search Administration**.
2. If you are using FAST Search:
 - a. Click **FastQuery**.
The **FASTQuery: Search Administration** page displays.
 - b. In the **Queries and Results** section, click **Metadata Properties**.
The **FASTQuery: Metadata Property Mappings** page displays.
3. If you are not using FAST Search:
 - a. Click **Search Service Application**.
The **Search Service Application: Search Administration** page displays.
 - b. In the **Queries and Results** section, click **Metadata Properties**.
The **Search Service Application: Metadata Property Mappings** page displays.
4. Set the Managed Property **IsDocument** to True.
5. Click **OK**.

Configuring Local Machines

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

Windows Vista/7:

- C:\Users\%username%\AppData\Roaming\ColligoOfflineClient\Config\
- C:\Users\%username%\AppData\Local\ColligoOfflineClient\Config\

Windows XP:

- C:\Documents and Settings\%username%\Local Settings\Application Data\ColligoOfflineClient\Config\
- C:\Documents and Settings\%username%\ApplicationData\ColligoOfflineClient\Config\

2. Use the crawler mapping names to populate the configuration file.

NOTE: Columns are case sensitive

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

Uninstalling Colligo Engage Outlook App

To uninstall, Colligo Engage Outlook App, complete the following steps:

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