Colligo Engage Outlook App 7.1

Offline 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 standard Windows IIS authentication types are supported:

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

- 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.
- 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.

An example batch file is listed below:

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

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 Offline Mode -> Colligo Engage Outlook App Offline Mode. Colligo Contributor Add-in -> Colligo Engage Outlook App Offline Mode.

Versions

Version 4.X -> Version 7.0 Version 6.X -> Version 7.0

If you wish to upgrade from any other applications to Colligo Engage Outlook App Offline 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 Connected Mode of Colligo Email Manager to Colligo Engage Outlook App Offline 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 Offline Mode.

To upgrade from Colligo Email Manager or Colligo Contributor Add-in 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\</version>	
Value Name	PSTDisableGrowAllowAuthenticodeOverrides	
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.

Кеу	/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
Туре	Multi lines of Text

Editing the Registry

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

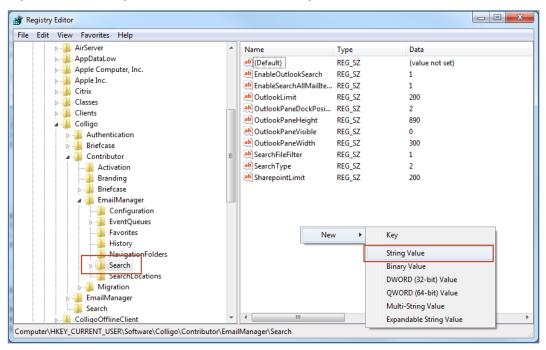
- HKEY_LOCAL_MACHINE\Software\Colligo\Contributor\
- HKEY LOCAL MACHINE\Software\Wow6432Node\Colligo\Contributor\
- HKEY_CURRENT_USER\Software\Colligo\Contributor\

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.
- 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.

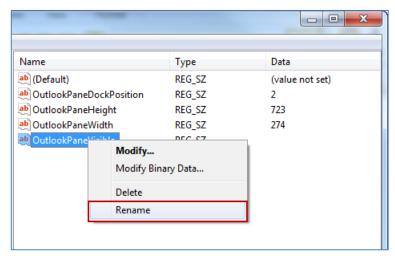
3. Right-click on the right side and select **New > String Value** from the contextual menu:



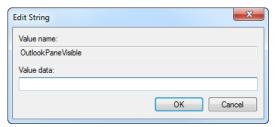
A new String Value appears in the Name list.

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:



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



6. 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:

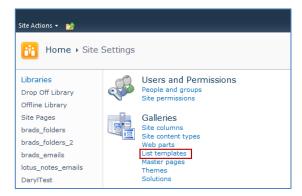
https://community.colligo.com/entries/23002379

Download the attachment CfsEmailLibrary2010.zip.

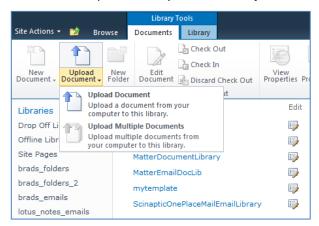
The zip file contains a site template named CfsEmailLibrary2010.stp.

Installing the Sample List Template

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

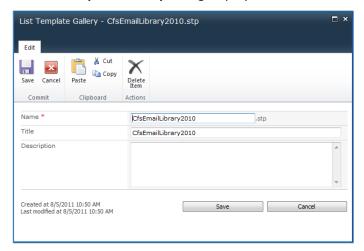


5. In the List Template Gallery, in the Library Tools > Documents ribbon, click Upload Document:



The **Upload Document** dialog displays.

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



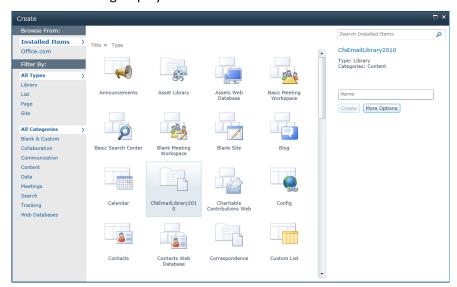
- 7. Enter the following information:
 - a. Name: enter a name for the template gallery
 - b. Title: enter a title that reflects the use of the template gallery
 - c. **Description**: enter a description for the template gallery
- 8. Click Save.

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.

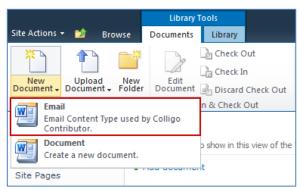
- 1. Navigate to the site collection you want to add the list template to.
- Select Site Actions > More Options.The Create dialog displays.



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)	Туре
Attachment	Attachment	Yes/No
Всс	Всс	Text
Bcc-Address	Bcc-Address	Text
Bcc-Type	Всс-Туре	Text
Categories	Categories	Text
Categories	Email Categories	
Сс	Сс	Text
Cc-Address	Cc-Address	Text
Сс-Туре	Сс-Туре	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	
То	То	Text
To-Address	To-Address	Text
To-Type	То-Туре	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.

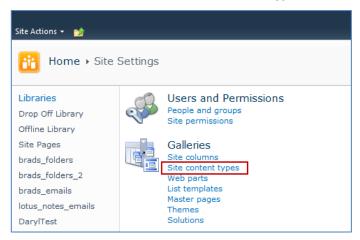
Metadata can be extracted into alternatively named columns. To extract metadata into non-default column names, see **Changing Column Mappings**.

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**.

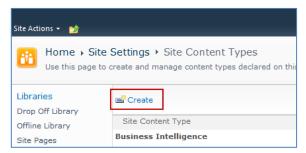
Adding a New Content Type to a Library

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.

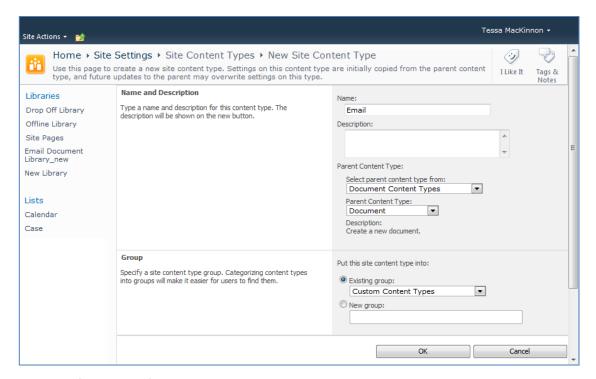
- 1. In your document library, select Site Actions > Site Settings.
- 2. In the Galleries section, select Site content types:



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



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



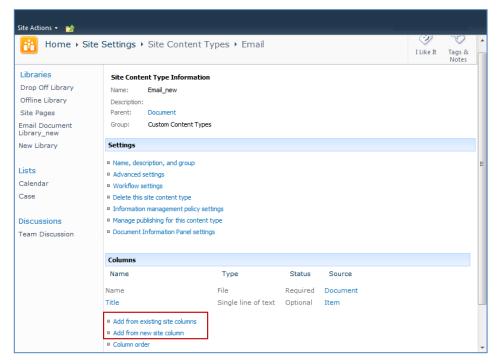
- 4. Enter the following information:
 - a. Name and Description
 - i. Name: enter a name for the content type
 - ii. **Description**: enter a description for the content type
 - iii. **Parent Content Type**: from the first drop-down list, select the parent content type group; in the second drop-down 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.

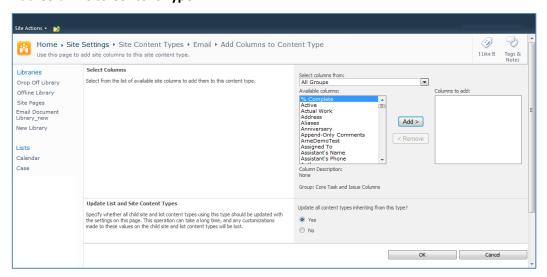
Configuring a Content Type

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

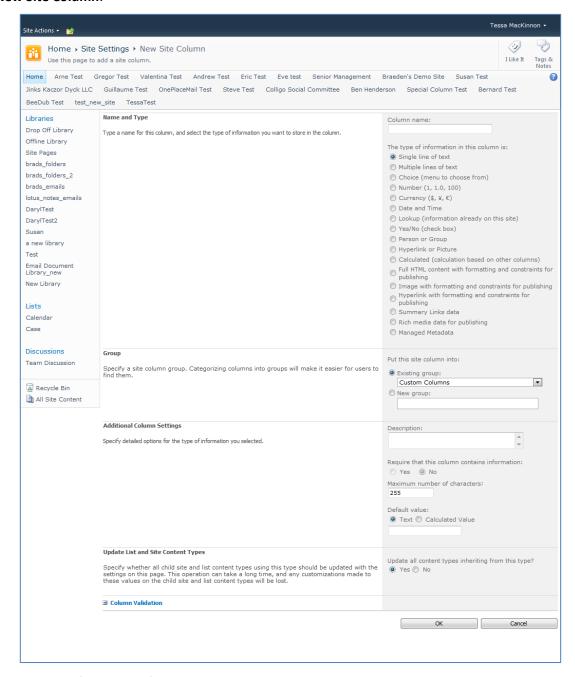


Add Columns to Content Type:



- 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:



- 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.

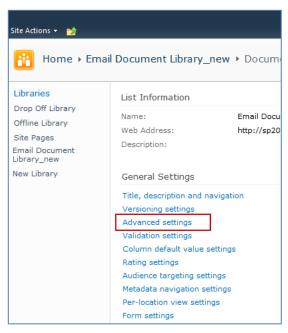
Hiding Columns

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.

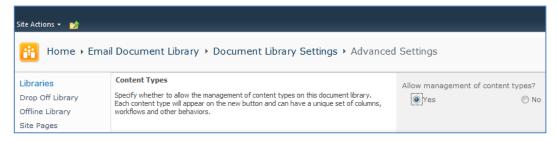
However, Colligo Engage Outlook App still extracts metadata into any hidden columns, and they can still be displayed in views, or used for filters.

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**:

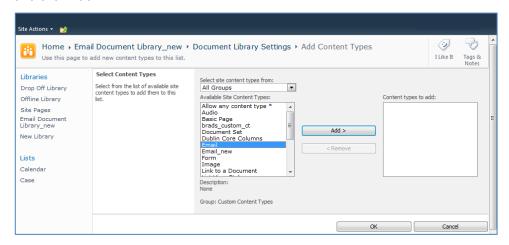


4. Click **OK** to save the changes and return to the Library Settings screen.

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



- 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**:



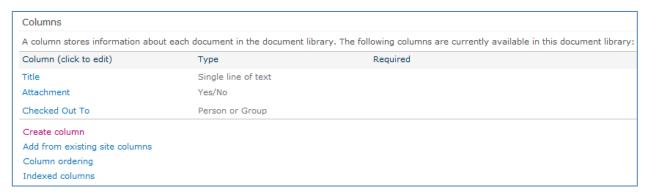
8. Click **OK** to return to the **Document Library Settings** screen. The new content type displays in the **Content Types** section:



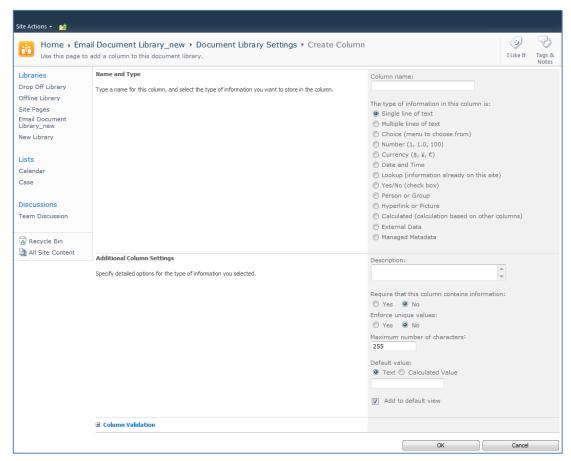
Creating a Library Without Content Types

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.
- In the Document Library Settings screen, scroll down to the Columns section and click Create Column:



The Create Column screen displays:



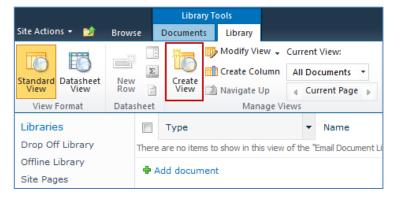
- 3. Enter the following information:
 - a. Name and Type
 - i. Column name: enter the column name
 - ii. Choose a type of information contained in the column
 - b. Additional Column Settings
 - i. **Description**: enter a description for the column
 - ii. **Require that this column contains information**: 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.

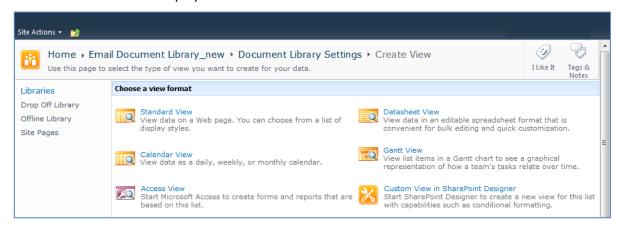
Creating an Email View

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:

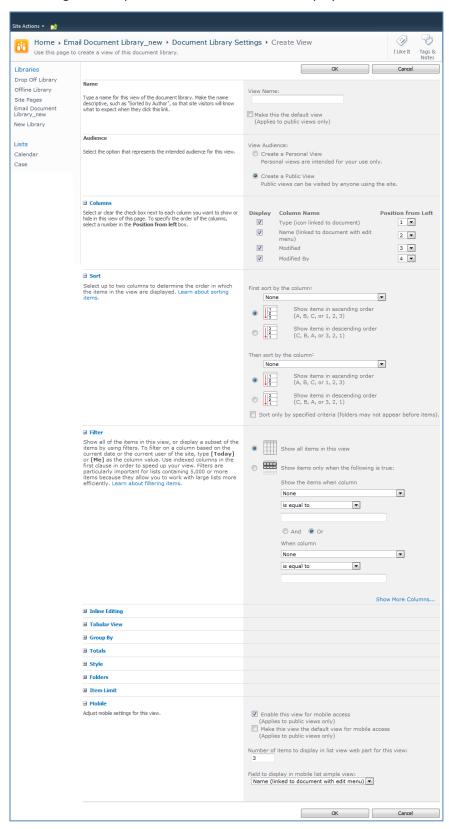


The Create View screen displays:

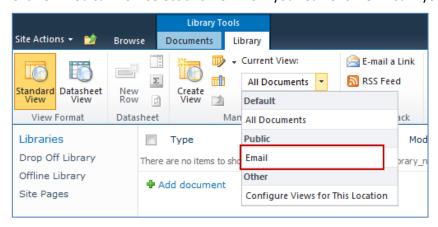


2. Click the Standard View link.

The configuration options for the standard view display:

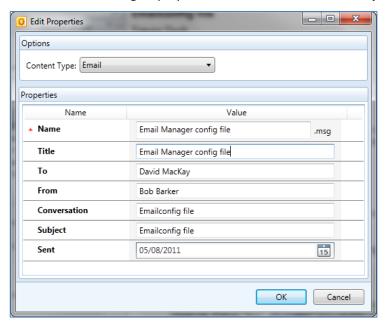


- 3. Enter the Name and Audience for your view.
- 4. Click **OK**. You can now select this view from your **Current View** list in your **Library** ribbon:



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:

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.

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.

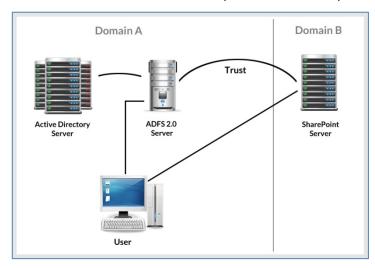
White Labeling

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:

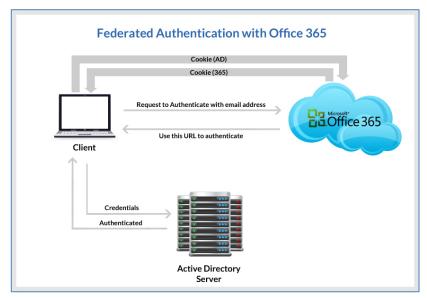
- 1. The user on client machine attempts to contact the SharePoint Server.
- 2. The SharePoint server denies the attempt, sending a message back to the client machine.
- 3. The client machine then attempts to connect to the AD FS 2.0 Server, which verifies the user's identity, and sends a token back 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 Apo 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:



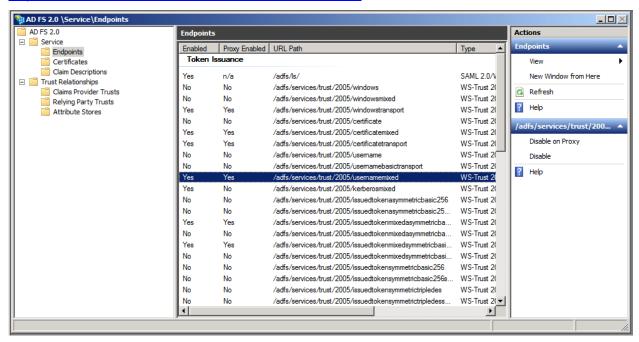
The workflow of the above infrastructure is as follows:

- 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 Office 365.

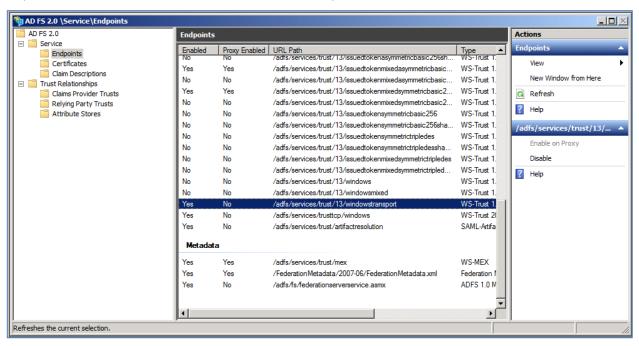
Enabling Authentication Service Endpoint

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)

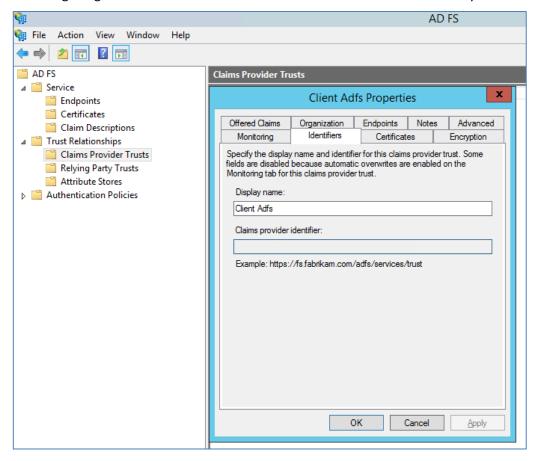


After your AD FS 2.0 server is configured, you need to deploy the following registry key to your users:

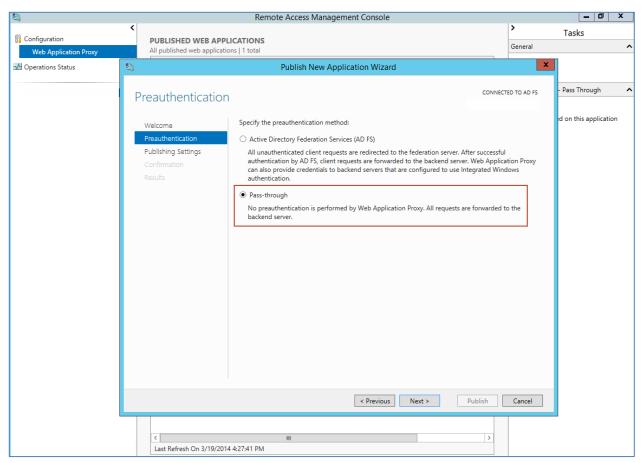
Key	HKEY_CURRENT_USER\Software\ Colligo \Contributor\Authentication\Adfs	
Value Name	<ad 2.0="" display="" for="" fs="" name="" only="" purposes="" –=""></ad>	
Value Data	<ad 2.0="" <a="" e.g.="" fs="" href="https://adfs.mycompany.com" name:="" server="">https://adfs.mycompany.com">https://adfs.mycompany.com > <ad 2.0="" e.g.="" for="" fs="" realm="" server="" sharepoint="" urn:sharepointsvradfs:sharepoint=""></ad></ad>	
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:

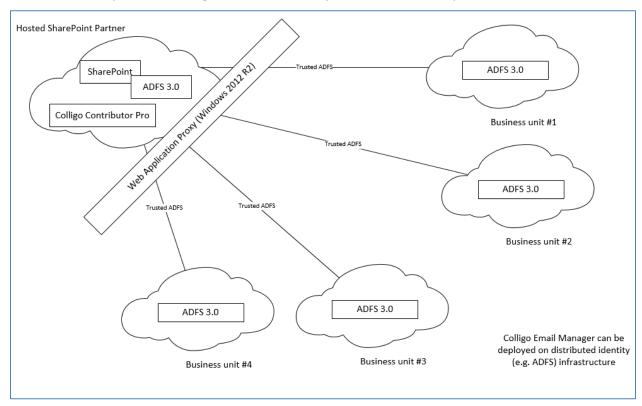


After your AD FS 3.0 server is configured, you need to deploy the following registry key to your users:

Кеу	HKEY_CURRENT_USER\Software\ Colligo \Contributor\Authentication\Adfs	
Value Name	<ad 3.0="" display="" for="" fs="" name="" only="" purposes="" –=""></ad>	
Value Data	" <claims identifier="" provider=""> > <adfs server=""> <sharepoint realm="">" See above</sharepoint></adfs></claims>	
	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.



Upload-only Folders vs Offline Folders

Colling Engage Outlook App allows your users to set folders as either upload-only or offline.

If you set a library/folder as upload-only, the contents of those locations are only available to you when you are connected to your SharePoint server. If you are not connected, the content is not available to you for viewing or editing.

If you set a library/folder as offline, the folder structure and the content of the offline location is downloaded to your machine for offline viewing and editing purposes. The contents of those locations are downloaded to your local machine and you are able to access the content at any time, regardless of whether you are connected to your SharePoint server or not.

If you do not set a library/folder as either an upload-only location or offline location, you will not be able to file any emails, attachments, and other content from Colligo Engage Outlook App to SharePoint.

These settings are applied at the folder level; you cannot apply this setting to an entire site or sub-site.

NOTE: a configuration setting allows you to disable the option to Set as Offline. If this setting is enabled, the option is greyed out for the user. For more details

When a library/folder is being synchronized, the following icon displays during the process:



A library/folder set as offline is marked with the following icon:



A library/folder set as upload-only is marked with the following icon:



NOTE: If you have a large number of users setting large numbers of libraries/folders as offline, this can create a high load on your server.

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
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:

- 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.

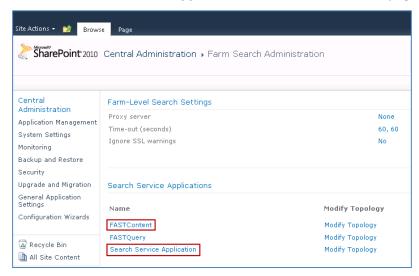
4. Upload at least one document to the library with each metadata column filled out in order for the search crawler to register any new columns.

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:

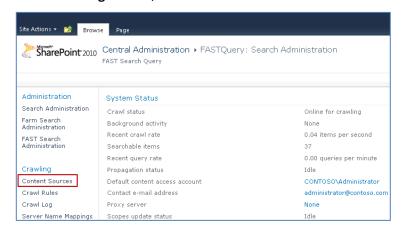
- 1. In SharePoint's **Central Administration**, go to **General Application Settings > Farm Search Administration**.
- 2. Depending on whether or not you are using FAST Search, choose one of the following options:
 - a. If you are using FAST Search, click FASTContent.
 The FASTQuery: Search Administration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

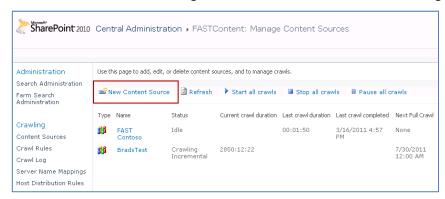
3. In the Crawling section, click Content Sources.



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.

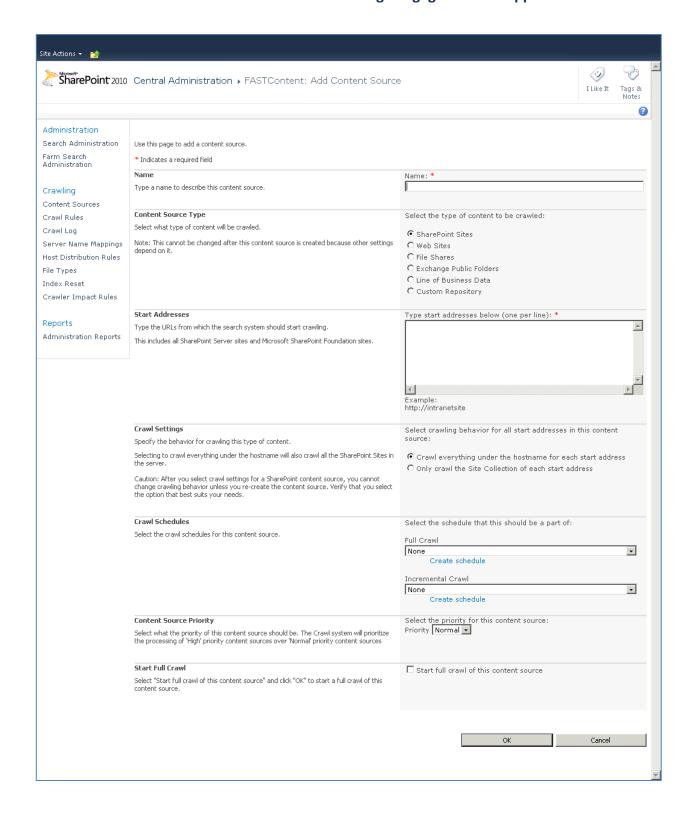
4. If a content source is not configured, click **New Content Source** to configure one.



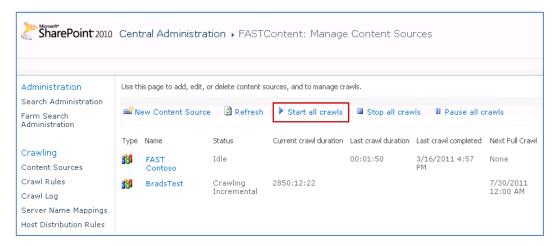
If you are using FAST Search, the **FASTContent: Add Content Source** page displays.

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

Colligo Engage Outlook App – Offline Mode



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



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

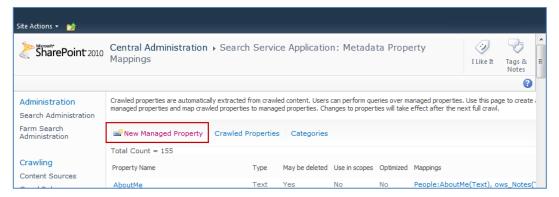
Adding Managed Property Mappings

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.

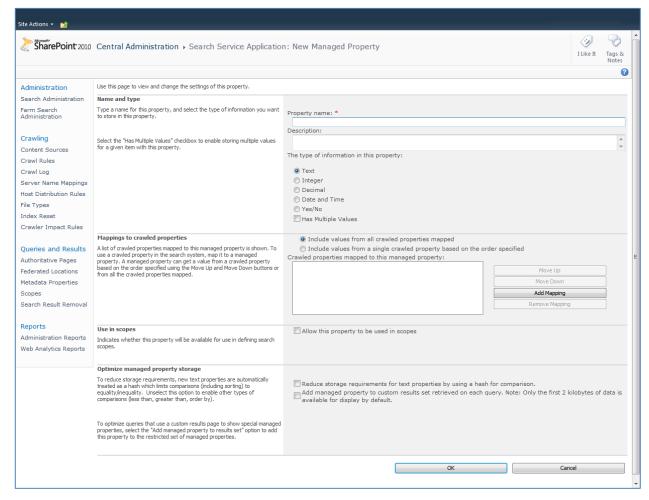
To add a new managed property mapping:

- 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.
 - 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.
 - In the Queries and Results section, click Metadata Properties.
 The Search Service Application: Metadata Property Mappings page displays.
- 4. Click New Managed Property.

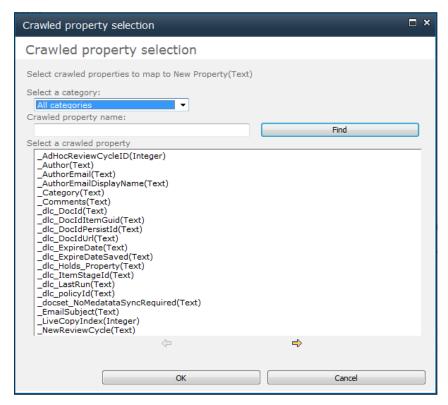
Colligo Engage Outlook App – Offline Mode



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
 - Mappings to crawled properties: click Add Mapping
 The Crawled property selection screen displays:

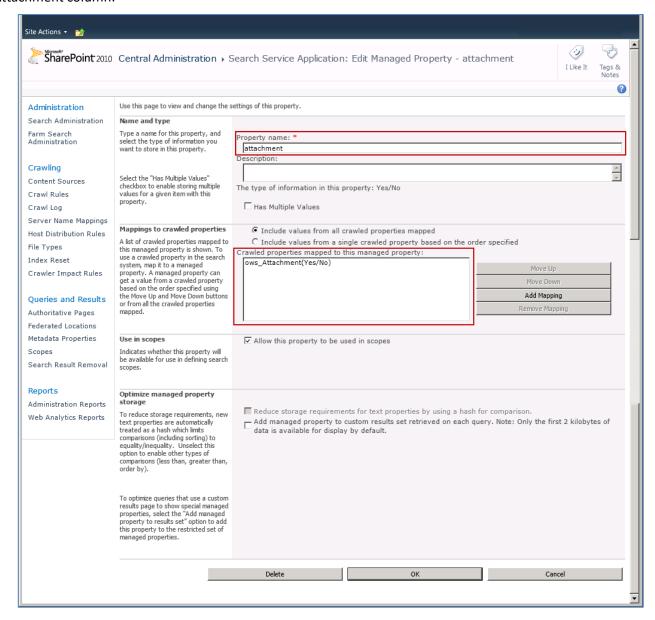


- i. Use the **Select a category** drop-down to filter the available properties, or enter a property in the **Crawled property name** field and click **Find**.
- ii. Select a crawled property from the list and click OK to add it to the mapping.
- iii. In the **Available crawled properties** list and 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:



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

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**.