

# Colligo Engage Windows App 7.0

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Administrator's Guide



# Contents

<b>Introduction .....</b>	<b>3</b>
Target Audience .....	3
Overview .....	3
Localization .....	3
<b>SharePoint Security &amp; Privileges .....</b>	<b>3</b>
<b>System Requirements .....</b>	<b>4</b>
Software Requirements .....	4
Client Software Requirements .....	4
Server Software Requirements .....	4
<b>Installing Colligo Engage Windows App .....</b>	<b>5</b>
.exe Installer .....	5
Interactive .exe Install.....	5
MSI Installer .....	5
Interactive MSI Install .....	5
Silent Install or Uninstall .....	5
<b>Configuration Options.....</b>	<b>6</b>
<b>Editing the MSI.....</b>	<b>6</b>
Installing the Orca MSI editor .....	6
Using Orca to Edit the MSI .....	6
<b>Editing the Registry .....</b>	<b>7</b>
<b>Communications .....</b>	<b>10</b>
Web Proxy Configuration.....	10
SharePoint Security and Privileges .....	10
Cache location and Encryption.....	10
<b>Server-side events.....</b>	<b>11</b>
<b>Workflow .....</b>	<b>11</b>
<b>Support for AD FS.....</b>	<b>12</b>
Federation with Office 365 Sites .....	13
Enabling Authentication Service Endpoint.....	14
Server Requirements for AD FS 3.0 .....	15
Distributed Identity Management.....	17
<b>Configuring SharePoint for Email Metadata .....</b>	<b>18</b>

Downloading the List Template .....	18
Installing the Sample List Template.....	18
Creating a Site .....	19
Manually Creating Content Types .....	20
Enabling Metadata Extraction .....	20
Adding a New Content Type to a Library .....	21
Configuring Content Types.....	23
Hiding Columns.....	25
Adding a New Content Type to Library .....	25
Creating a Library Without Content Types.....	27
Creating An Email View .....	28
Validating Metadata Extraction .....	30
Changing Column Mappings .....	31
<b>Uninstalling Colligo Engage Windows App .....</b>	<b>32</b>

## Introduction

This document provides guidance for your deployment of Colligo Engage Windows App.

User documentation is provided on the Colligo Engage Windows App support website:

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

For any further technical details please contact Colligo Technical Support [here](#), or for sales related question please contact [sales@colligo.com](mailto:sales@colligo.com).

## Target Audience

- IT Administrator
- Technical Evaluator
- Deployment Manager

## Overview

Colligo Engage Windows 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 Windows App for SharePoint is IT-department friendly. It supports customized installations and can be deployed using your choice of deployment tools.

Colligo Engage Windows App supports SharePoint Online (Office365), 2007, 2010, and 2013.

## Localization

Colligo Engage Windows App is available in English, French, German, Spanish (Castilian) and Spanish (Mexican) languages. Colligo Engage Windows App localizes to the base language of the running machine, defaulting to English.

## SharePoint Security & Privileges

By using SharePoint's web services to access SharePoint data, Colligo Engage Windows App respects all privileges defined on the site. Colligo Engage Windows 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 2007/2010)
- 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.

# System Requirements

## Software Requirements

Colligo Engage Windows App requires the following software:

- Windows 8
- Windows 7
- Windows Vista

## Client Software Requirements

Colligo Engage Windows App has the following client software requirements:

- Microsoft .NET framework 4.5.1 Runtime
  - <http://www.microsoft.com/en-ca/download/details.aspx?id=40779>
- Microsoft Office 2007, 2010 or 2013
- Microsoft Office PIAs
  - Office 2010: <http://www.microsoft.com/download/en/details.aspx?id=3508>
  - Office 2007: <http://www.microsoft.com/download/en/details.aspx?id=18346>
- Microsoft Visual C++ 2013 Redistributable Package
  - <http://www.microsoft.com/en-ca/download/details.aspx?id=40784>
- Windows Identity Foundation: <http://www.microsoft.com/en-ca/download/details.aspx?id=17331>  
**NOTE:** WIF is required to handle single sign on authentication through AD FS 2.0.

## Server Software Requirements

Colligo Engage Windows App requires at least one of the following:

- Microsoft SharePoint Server 2010, MOSS 2007
- SharePoint Foundation Microsoft Windows SharePoint Services (WSS) 3.0, or 2.0
- SharePoint Online (Office365)
- SharePoint 2013

## Installing Colligo Engage Windows App

Colligo provides both an .exe installer and an .msi installer for Colligo Engage Windows App.

There are different installer packages dependent on which Operating System you have:

- 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 (downloaded from [www.colligo.com](http://www.colligo.com))
- 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 Windows 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 Windows 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 Windows 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\ColligoEngageInstall\CustomColligoEngage.msi /qn
```

### 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.

## Configuration Options

Colligo Engage Windows App saves settings in the registry. Many settings can be configured post-install by pushing out settings to the registry. Colligo Engage Windows App offers administrators the ability to configure a number of settings at install or post-install time. A detailed list of settings is maintained on the Colligo website at <http://www.colligo.com/support>

## Editing the MSI

To edit the MSI installer package you need an MSI database editor. Colligo recommends the Orca database editor. Orca is a Microsoft utility for modifying and validating Windows Installer packages. It is intended to allow setup authors and administrators to manipulate databases compatible with the Windows Installer Service. This utility is a part of the Windows Installer SDK download, along with other MSI related tools.

An introduction to Orca can be found on the Microsoft site:

<http://support.microsoft.com/kb/255905/EN-US/>

### Installing the Orca MSI editor

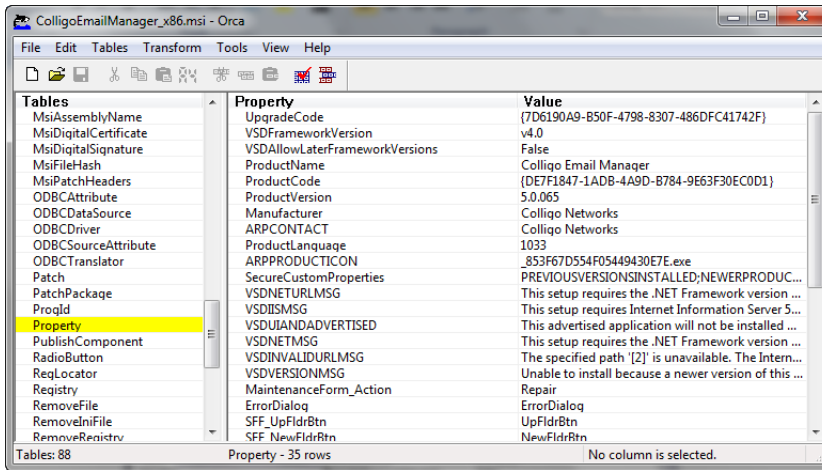
Instead of downloading the entire Windows Installer SDK, you can download Orca from Colligo's web site: <https://community.colligo.com/entries/23392635-How-can-I-use-Orca-MSI-editor-to-configure-a-Colligo-installer>

### Using Orca to Edit the MSI

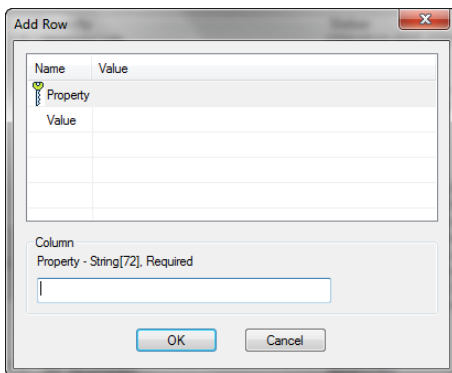
Once you have installed Orca, you can start editing the Colligo Engage Windows App.msi file. Colligo recommends copying the MSI file and working on the copy (since **Save As** in Orca does not save the entire MSI package).

Editing an MSI file:

1. Open the MSI file in Orca.
2. Navigate to the **Property** table in the **Tables** list.



- From the **Tables** menu, select **Add Row**.  
The **Add Row** dialog displays:



- Enter the **Property** name and **Value**.
  - Click **OK**.
- The new property displays in the **Property Table**.

**NOTE:** The property names are case sensitive.

**NOTE:** When editing an MSI database using Orca, there are extra steps required if you perform a **Save As....** As a best practice, it is advisable to edit an MSI database and **Save** the file being edited.

## Editing the Registry

Registry settings may be stored under HKEY\_LOCAL\_MACHINE or HKEY\_CURRENT\_USER. Values are stored in:

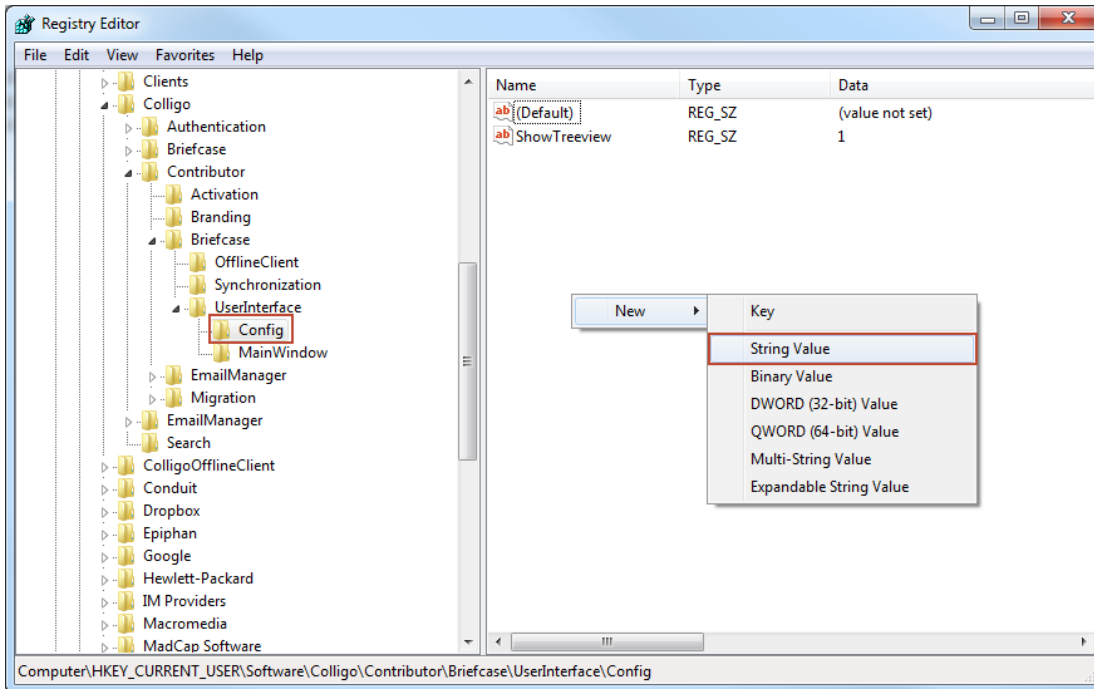
- HKEY\_LOCAL\_MACHINE\Software\Colligo\Contributor\
- HKEY\_LOCAL\_MACHINE\Software\Wow6432Node\Colligo\Contributor\
- HKEY\_CURRENT\_USER\Software\Colligo\Contributor\

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

- Open the Registry Editor.
- Navigate to the Key you want to add a new String Value to. For example, if the key is **Colligo\Contributor\Briefcase\UserInterface\Config**, Config is the key and **EnableMetadataPrompt** is the string value within the **Config** Key.

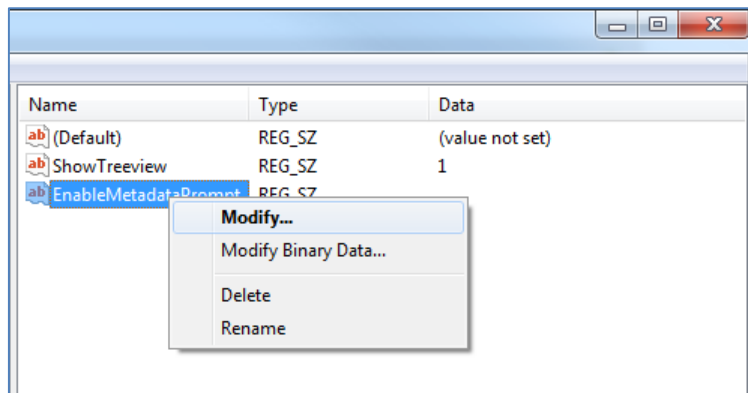
**NOTE:** If the key doesn't exist, you can create it by right clicking on the parent key and select **New Key** from the contextual menu.

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

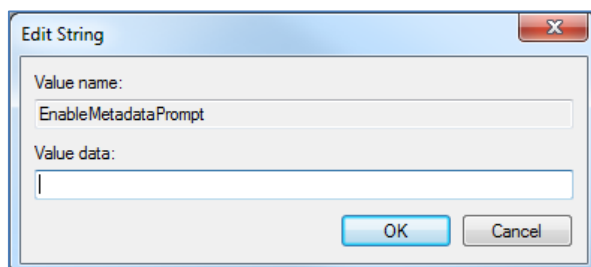


A new String Value appears in the **Name** list.

4. Enter the name of the String Value.  
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**.

## 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.

## Web Proxy Configuration

Colligo Engage Windows App can be configured to use a web proxy. Proxy options are either:

- Direct connection (No Proxy)
- IE's default proxy
- Other proxy

For more information about configuring this setting, <http://www.colligo.com/support/setting/web-proxy-type/>

The other proxy is defined in the CFS.exe.config file according to the specifications listed on msdn here: [http://msdn2.microsoft.com/en-us/library/kd3cf2ex\(vs.80\).aspx](http://msdn2.microsoft.com/en-us/library/kd3cf2ex(vs.80).aspx)

## SharePoint Security and Privileges

By using SharePoint's web services to access SharePoint data, Colligo Engage Windows App respects all privileges defined on the site. A user needs at least read access to an item in order to cache it. Colligo Engage Windows 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:

- Basic
- Digest
- Kerberos (Integrated Windows)
- NTLM (Integrated Windows)

ASP.NET forms-based authentication based on Active Directory Federation Services (AD FS 2.0 ) or similar identity management systems are also supported.

SharePoint by default does not provide web service permissions to anonymous users, so this permission level cannot be used for taking sites offline. Client certificates and single-sign-on (SSO) authentication methods are currently not supported.

## Cache location and Encryption

Colligo Engage Windows App caches SharePoint content on the local machine. The default cache location is in the users local profile area located at the following location in Windows XP:

%UserProfile%\Local Settings\Application Data\ColligoOfflineClient\Storage5

You can change the location to any other valid path including: the local file-store; network location; or other (for example, USB drive). For performance and connectivity reasons the local file-system is the preferred location for the cache.

Colligo Engage Windows App can be configured to secure data using the Windows Encrypting File System (EFS); a good introduction to Windows EFS can be found on Wikipedia: [http://en.wikipedia.org/wiki/Encrypting\\_File\\_System](http://en.wikipedia.org/wiki/Encrypting_File_System). EFS can be configured to be compliant with the Federal Information Processing Standard (FIPS 140-1 and FIPS 140-2).

Microsoft TechNet published an evaluation of EFS for FIPS compliance here: <http://www.microsoft.com/technet/archive/security/topics/issues/fipseval.mspx>.

## Server-side events

SharePoint may have server-side event-handlers defined. Typically event handlers may be added to the ItemAdding or ItemAdded events. These events are triggered when Colligo Engage Windows App performs content operations. The event-handlers may operate synchronously or asynchronously (typically ItemAdding would be synchronous, ItemAdded would be asynchronous). Event handlers that perform asynchronously and change the content must be sure to increment the internal item version to ensure Colligo Engage Windows App is notified of the content updates.

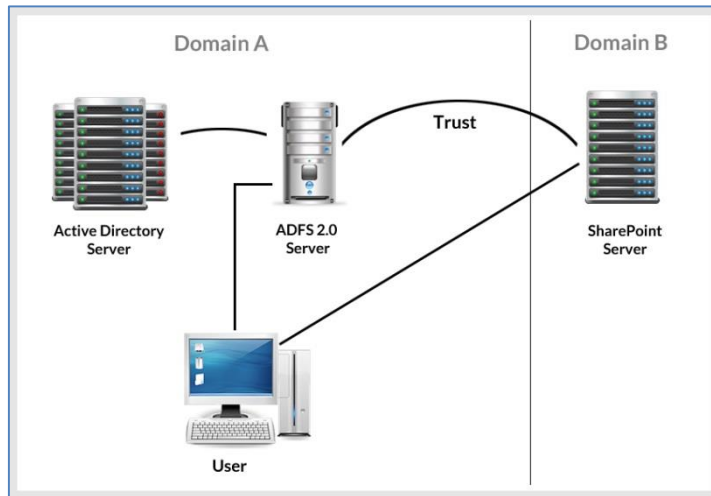
## Workflow

Workflows are typically started or progressed by content changes. For example the **Get Approval** workflow starts when a document is changed and requires approval. Colligo Engage Windows App works with workflow such that content changes will initialize workflows on the server. There is no support for local workflows on the client.

## Support for AD FS

Colligo Engage Windows 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.

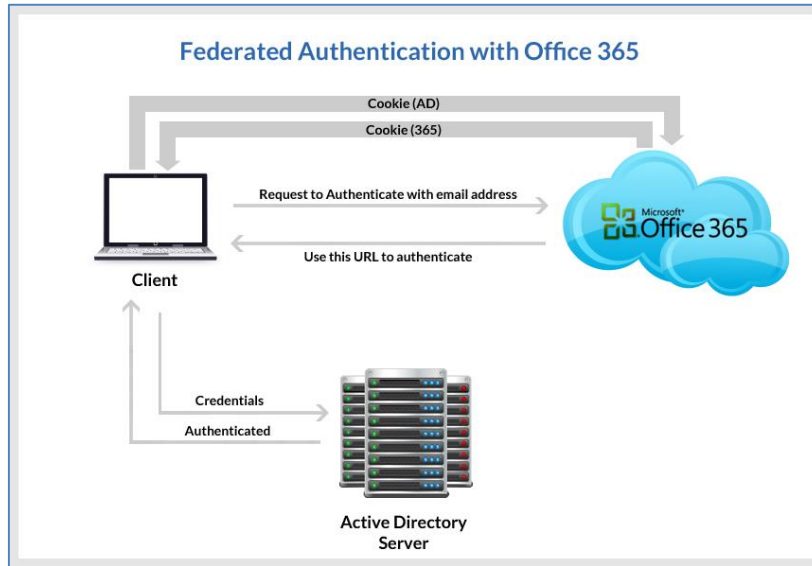
**NOTE:** Configuration settings for AD FS 2.0 or 3.0 can be found on our website:

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

## Federation with Office 365 Sites

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

The following diagram illustrates how Colligo Engage Windows 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 Windows 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.

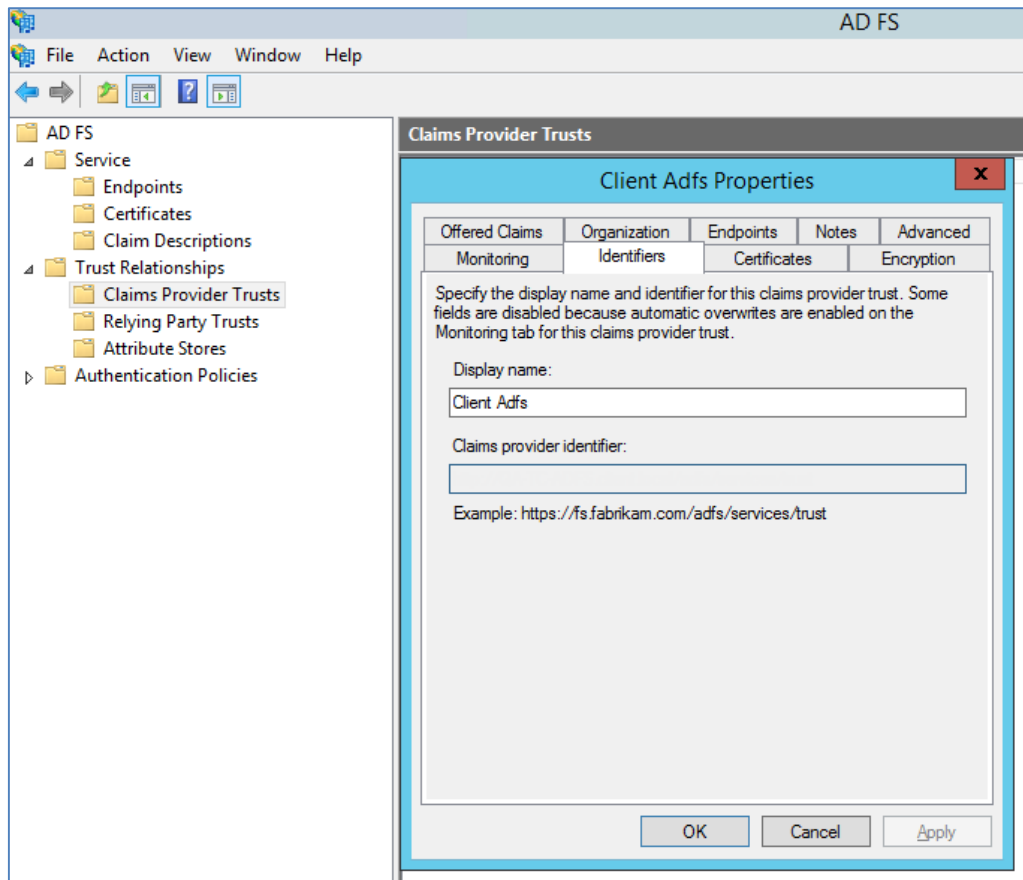


After your AD FS 2.0 server is configured, you need to deploy the following registry key to your users:

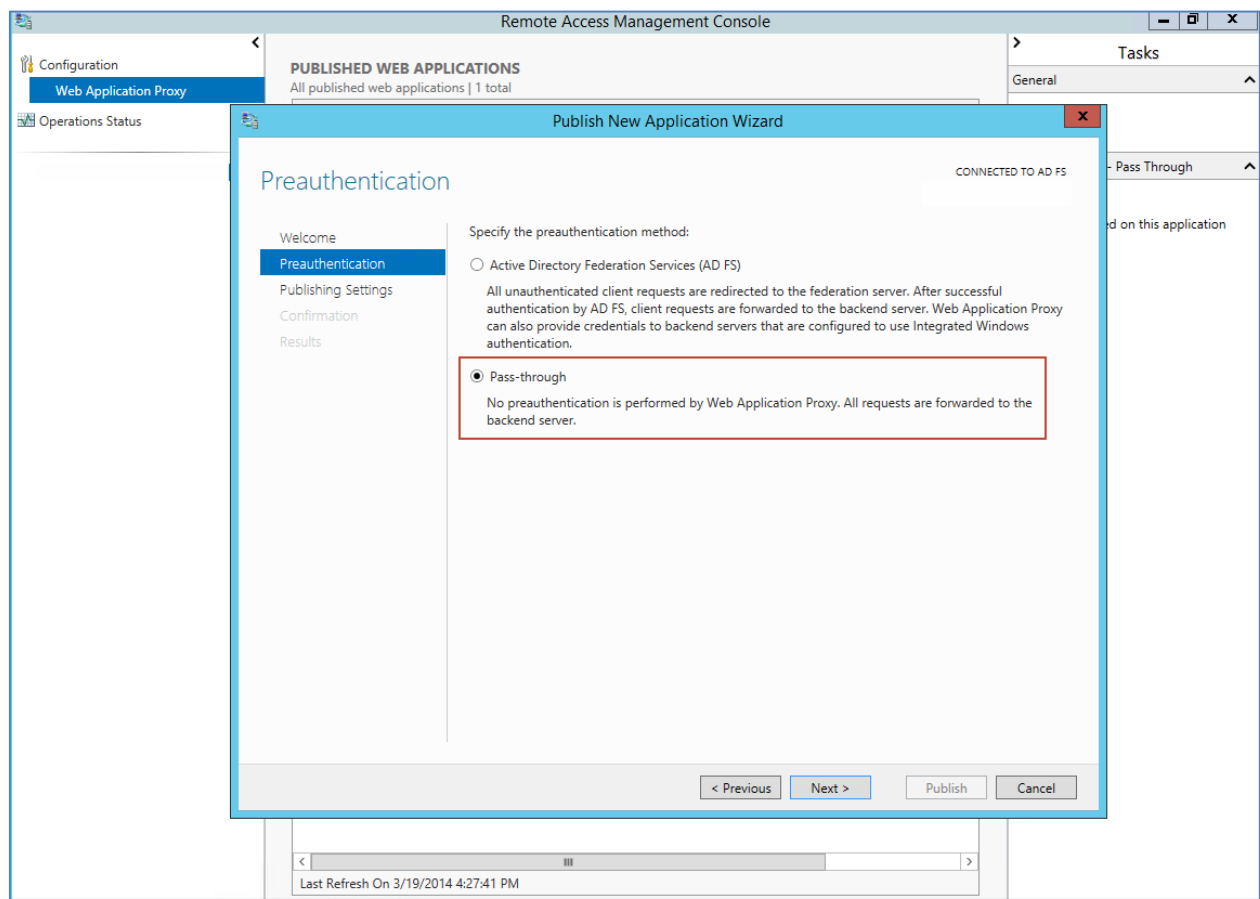
<b>Key</b>	HKEY_CURRENT_USER\Software\ Colligo \Contributor\Authentication\Adfs
<b>Value Name</b>	<ADFS display name – for display purposes only>
<b>Value Data</b>	<AD FS 2.0 Server name: e.g. <a href="https://adfs.mycompany.com">https://adfs.mycompany.com</a> > <ADFS realm for SharePoint server e.g.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

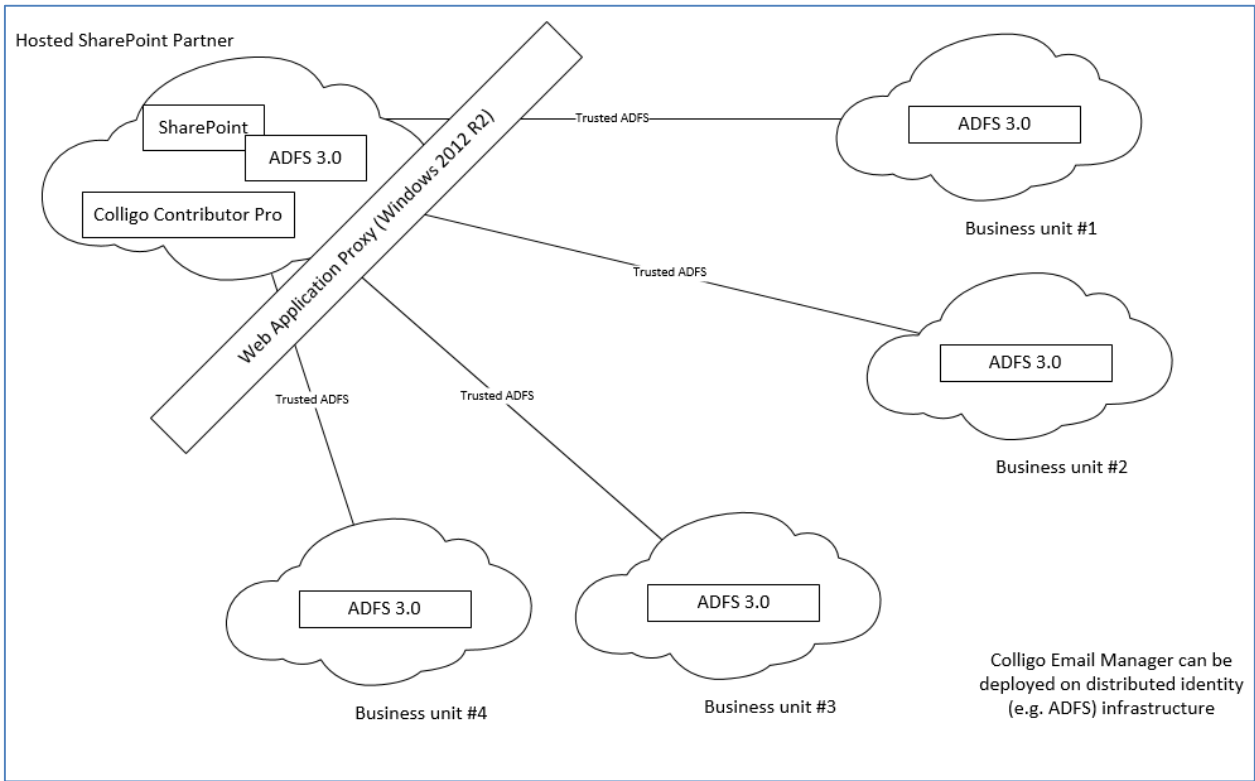


After your AD FS 3.0 server is configured, you need to deploy the following registry key to your users:

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.



## Configuring SharePoint 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 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 following location:

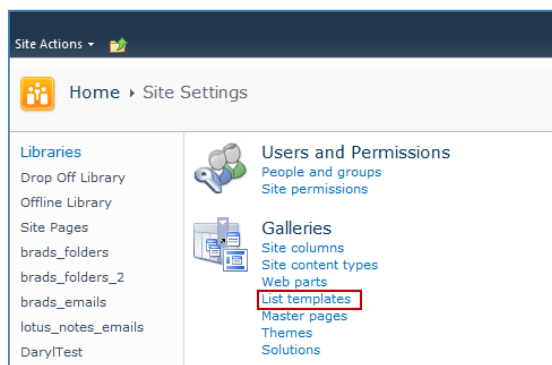
<https://community.colligo.com/entries/23216964-How-do-I-set-default-column-names-for-email-metadata-mapping->

Download the attachment *CfsEmailLibrary2010.zip*.

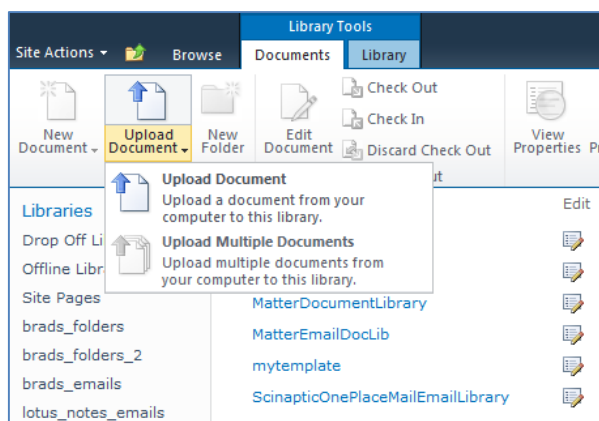
The zip file contains a site template named *CfsEmailLibrary2010.stp*.

### 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**:

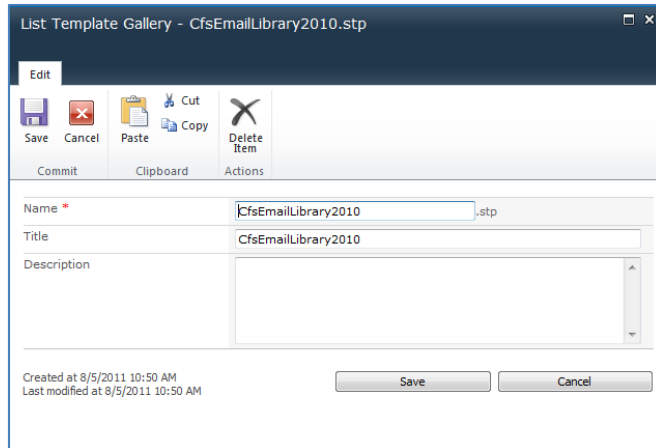


5. In the List Template Gallery, in the **Library Tools** > **Documents** ribbon, click **Upload Document**:



The **Upload Document** dialog displays.

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

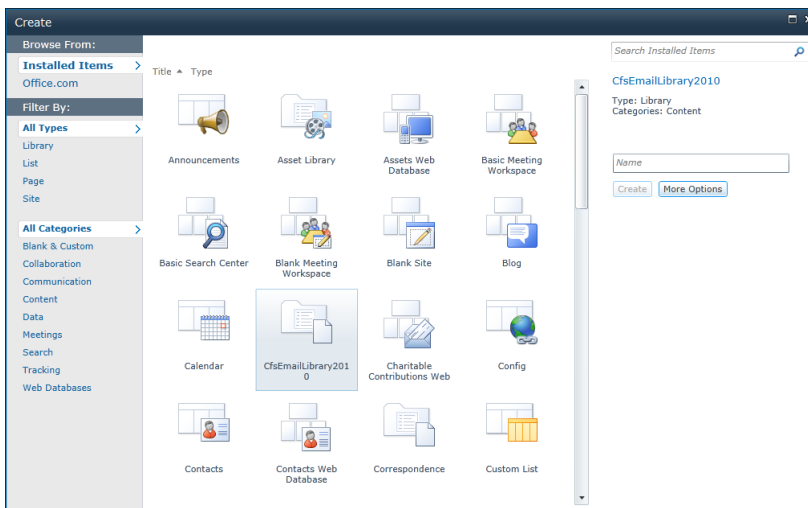


7. Enter the following information:
  - a. **Name:** enter a name for the template gallery
  - b. **Title:** enter a title that reflects the use of the template gallery
  - c. **Description:** enter a description for the template gallery
8. Click **Save**.  
The new list template displays in the **List Template Gallery**.

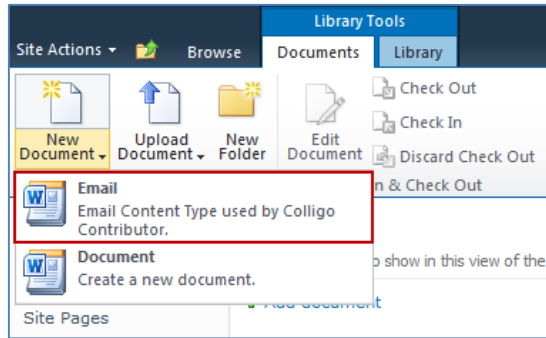
## Creating a Site

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.
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 Windows 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 Windows App extracts the following metadata properties from emails:

Email Metadata	Default Column Name	Type
Attachment	Attachment	Yes/No
Bcc	Bcc	Text
Bcc-Address	Bcc-Address	Text
Bcc-Type	Bcc-Type	Text
Categories	Categories	Text
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
To	To	Text
To-Address	To-Address	Text
To-Type	To-Type	Text

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

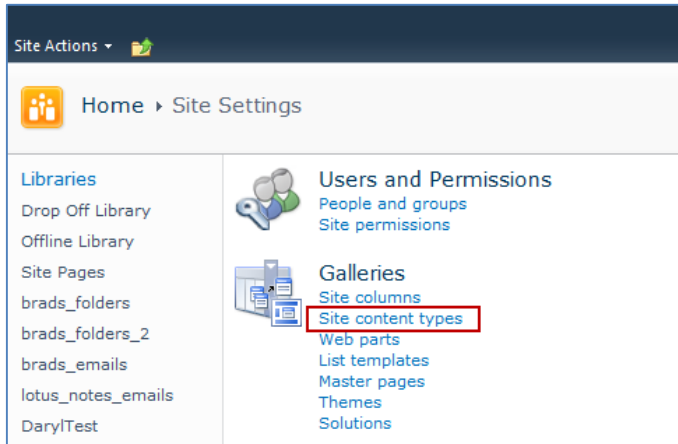
The **Default Column Name** refers to the display name of the SharePoint column

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

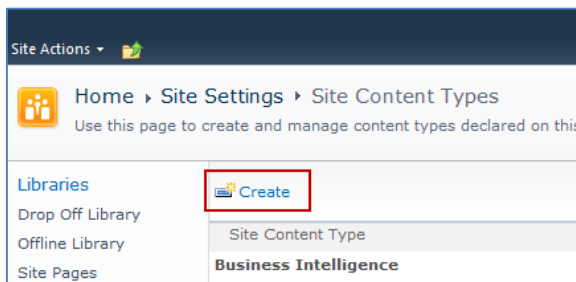
### Adding a New Content Type to a Library

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.

I Like It Tags & Notes

**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:

Document Content Types ▾

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: Custom Content Types ▾

☐ 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 Content Types

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 a 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
3. Click **OK** to display the **New Site Column** screen:

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
- DarylTest
- DarylTest2
- 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 (checkbox)
- ☐ 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**

4. 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.

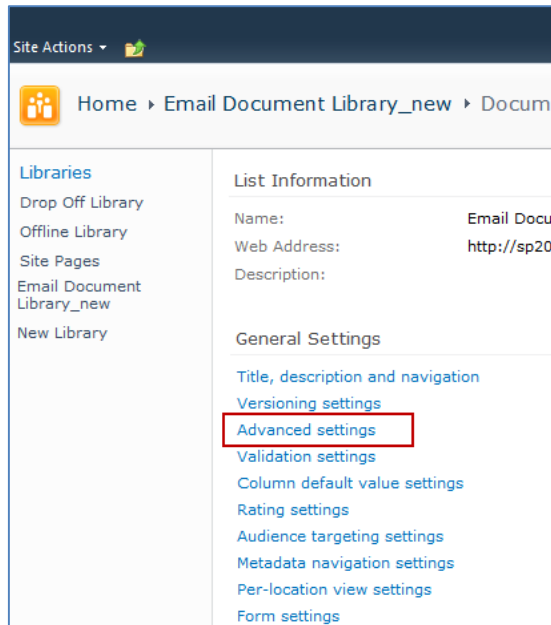
### Hiding Columns

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

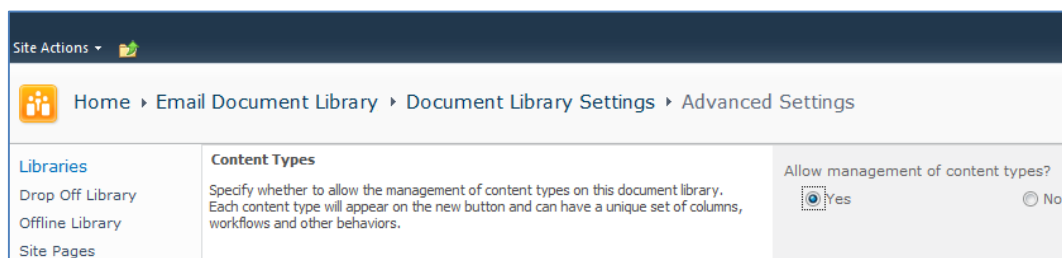
However, Colligo Engage Windows App still extracts metadata into any hidden columns, and they can still be displayed in views, or used for filters.

### 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:



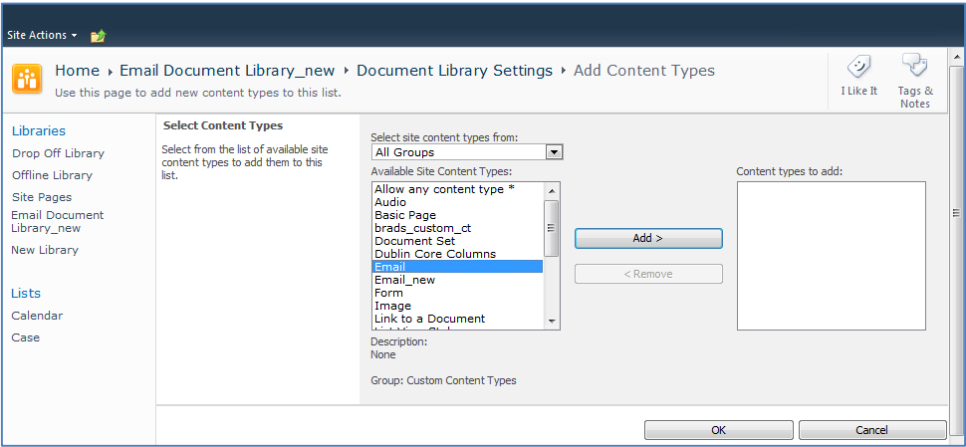
3. In the **Advanced Settings** screen, ensure the **Allow management of content types** option is set to **Yes**:



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	✓	
<a href="#">Add from existing site content types</a>		
<a href="#">Change new button order and default content type</a>		

- 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:

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	✓	
<a href="#">Add from existing site content types</a>		
<a href="#">Change new button order and default content type</a>		

## 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

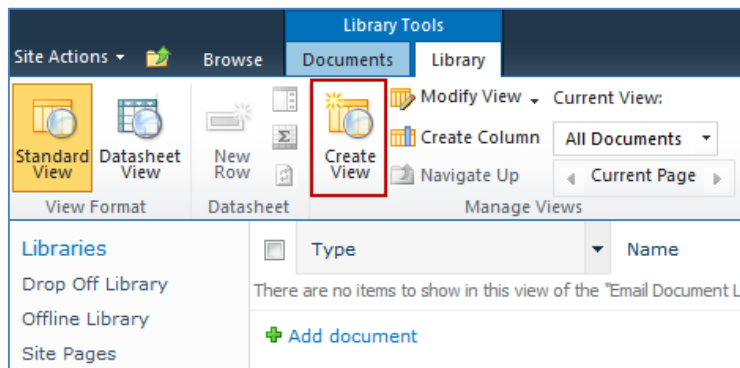
3. Enter the following information:
  - a. **Name and Type**
    - i. **Column name:** enter the column name

- 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.

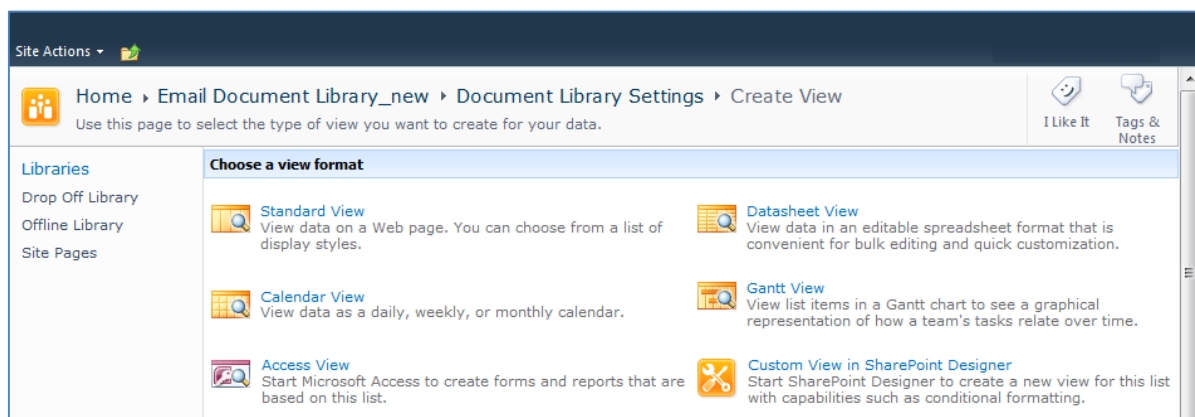
### Creating An Email View

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.

I Like It

Tags & Notes

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.

View Name:

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

Audience

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

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.

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.

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

Sort

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

First sort by the column:

None

☒

1
2
3

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

☐

3
2
1

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

Then sort by the column:

None

☒

1
2
3

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

☐

3
2
1

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

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

☒


 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...](#)

Inline Editing

Tabular View

Group By

Totals

Style

Folders

Item Limit

Mobile

Adjust mobile settings for this view.

☒ 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

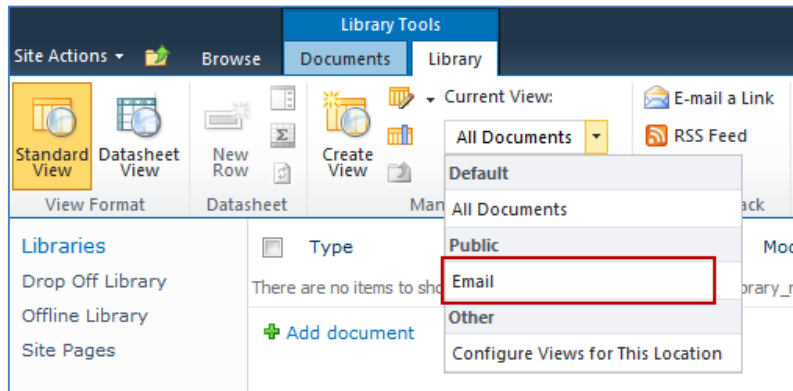
Field to display in mobile list simple view:

Name (linked to document with edit menu)

OK

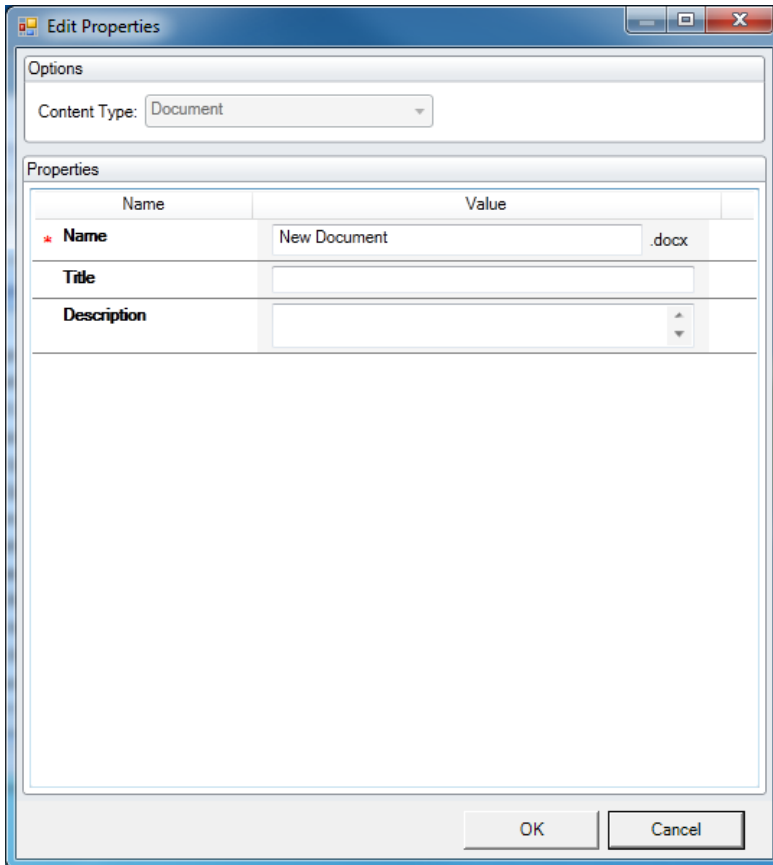
Cancel

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 folder, and check that the correct metadata is being displayed and extracted:



## 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 the following location:

`<%UserProfile%>\Application Data\Local\ColligoOfflineClient\Config\Email`

**NOTE:** the Colligo folder must be manually created.

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 SPColumn="Attachment" Field="Attachment"/>
    <Mapping SPColumn="Bcc" Field="Bcc"/>
    <Mapping SPColumn="Bcc-Address" Field="Bcc-Address"/>
    <Mapping SPColumn="Bcc-Type" Field="Bcc-Type"/>
    <Mapping SPColumn="Categories" Field="Categories"/>
    <Mapping SPColumn="Cc" Field="Cc"/>
    <Mapping SPColumn="Cc-Address" Field="Cc-Address"/>
    <Mapping SPColumn="Cc-Type" Field="Cc-Type"/>
    <Mapping SPColumn="Conversation" Field="Conversation"/>
    <Mapping SPColumn="From" Field="From"/>
    <Mapping SPColumn="From-Address" Field="From-Address"/>
    <Mapping SPColumn="From-Type" Field="From-Type"/>
    <Mapping SPColumn="Importance" Field="Importance"/>
    <Mapping SPColumn="Received" Field="Received"/>
    <Mapping SPColumn="Received-UTC" Field="Received-UTC"/>
    <Mapping SPColumn="Sensitivity" Field="Sensitivity"/>
    <Mapping SPColumn="Sent" Field="Sent"/>
    <Mapping SPColumn="Sent-UTC" Field="Sent-UTC"/>
    <Mapping SPColumn="Subject" Field="Subject"/>
    <Mapping SPColumn="Title" Field="Subject"/>
    <Mapping SPColumn="Email Subject" Field="Subject"/>
    <Mapping SPColumn="Email Categories" Field="Categories"/>
    <Mapping SPColumn="To" Field="To"/>
    <Mapping SPColumn="To-Address" Field="To-Address"/>
    <Mapping SPColumn="To-Type" Field="To-Type"/>
    <Mapping SPColumn="Original Filename" Field="Original Filename"/>
    <Mapping SPColumn="Original Bytes" Field="Original Bytes"/>
    <Mapping SPColumn="Original Created" Field="Original Created"/>
    <Mapping SPColumn="Original Modified" Field="Original Modified"/>
    <Mapping SPColumn="Original Created UTC" Field="Original Created UTC"/>
    <Mapping SPColumn="Original Modified UTC" Field="Original Modified UTC"/>
  </Mappings>
</ColligoMappingConfig>
```

## Uninstalling Colligo Engage Windows App

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

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