

OnePlaceMail User Guide | 6.6

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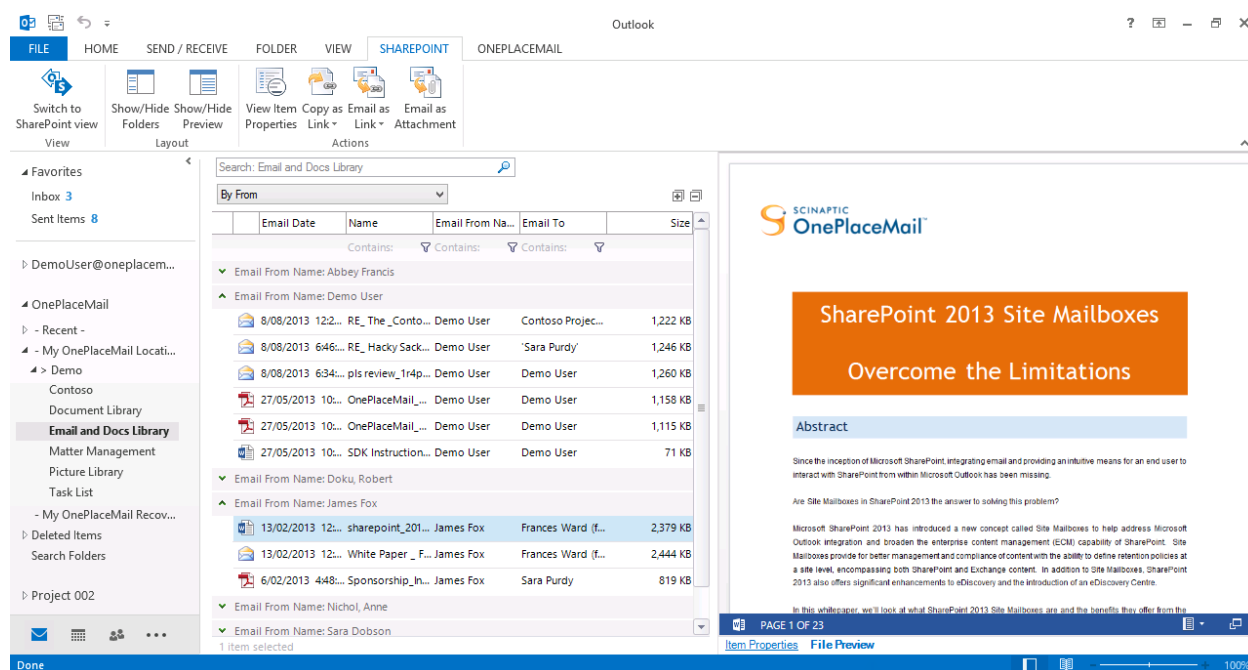
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Document Purpose

This document provides guidance for using OnePlaceMail.

Imagine if SharePoint content was presented within Microsoft Outlook with the same look and feel as your Inbox. Furthermore, imagine if you could combine the power of Outlook such as email and document preview with the strengths of the SharePoint Platform. This is now possible with OnePlaceMail.



OnePlaceMail: Outlook Style Interface to SharePoint

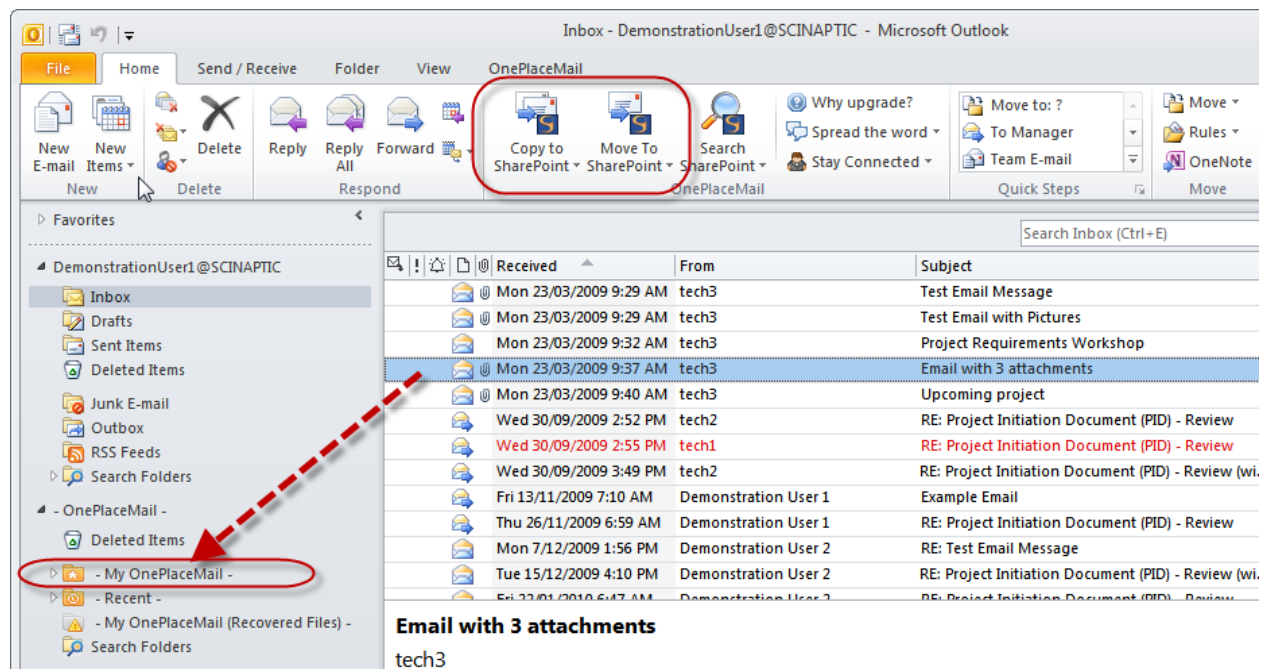
OnePlaceMail encourages the adoption of SharePoint by providing seamless capture, classification and access to content within SharePoint from your familiar Microsoft Outlook Client and other desktop applications such as File Explorer, Word, Excel and PowerPoint.

Quick Start - Connect Outlook to SharePoint

1.1 Save to SharePoint

SharePoint Button on the Ribbon/Task Bar

OnePlaceMail provides a 'Copy To' and 'Move To' button on the ribbon/task bar. Simply select the emails you wish to save to SharePoint and press the appropriate button. Alternatively, drag & drop the emails to the 'My OnePlaceMail' folder.

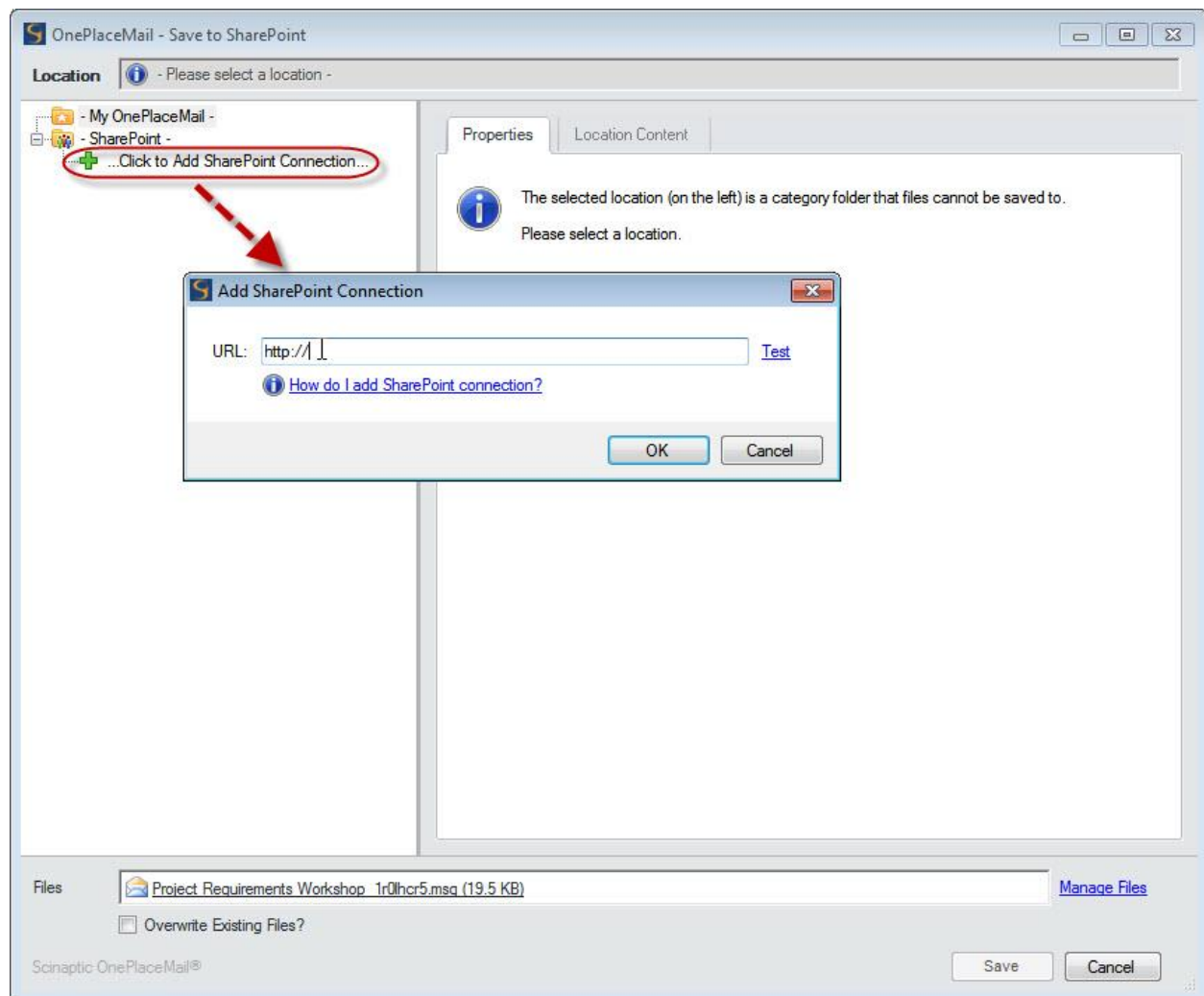


Save to SharePoint using buttons or drag & drop

Tip: OnePlaceMail provides the ability to manage favorite SharePoint locations for an easy drag & drop of emails or email attachments to folders on the left navigation of Outlook (representing SharePoint locations). This is explained in the next section of this guide.

Add SharePoint Connection

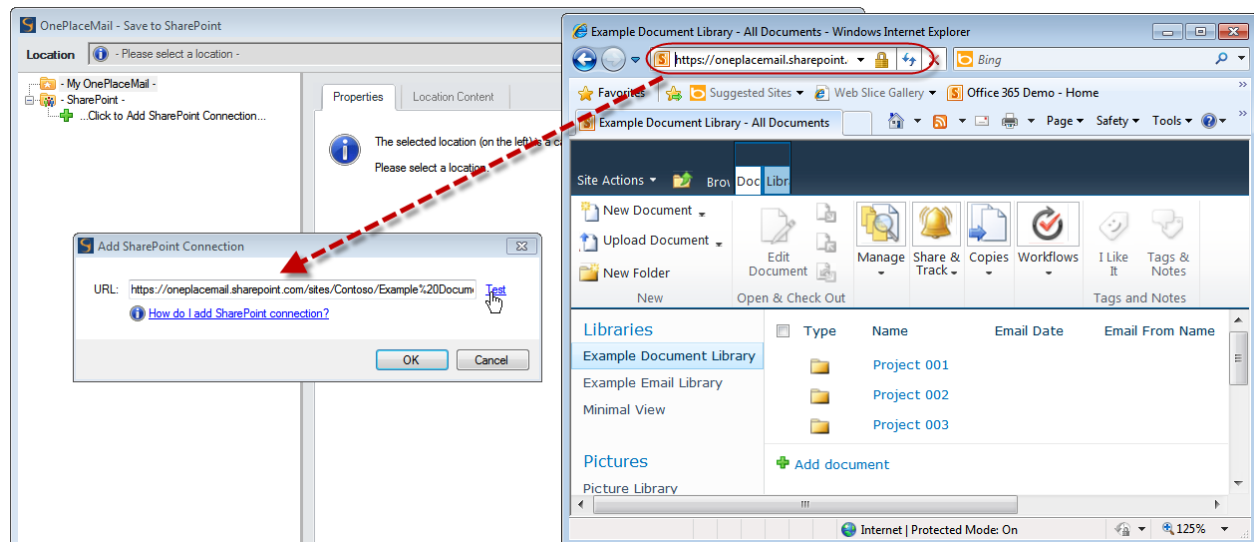
The first time you save content to SharePoint using OnePlaceMail you will need to define a connection to your SharePoint environment. This is easily performed by clicking on the green plus icon under SharePoint.



Click Add SharePoint Connection

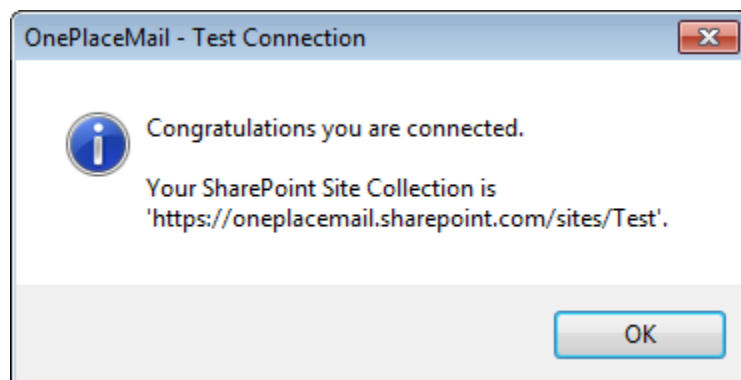
The Add SharePoint Connection Window will appear and allow you to enter your SharePoint Site collection URL.

Simply Copy & Paste the full Web browser URL from your SharePoint Site into the window and OnePlaceMail will resolve the Site Collection name for you.



Copy/Paste full URL from SharePoint Library/Site

Upon selecting 'OK', OnePlaceMail will resolve and test the URL you have entered.



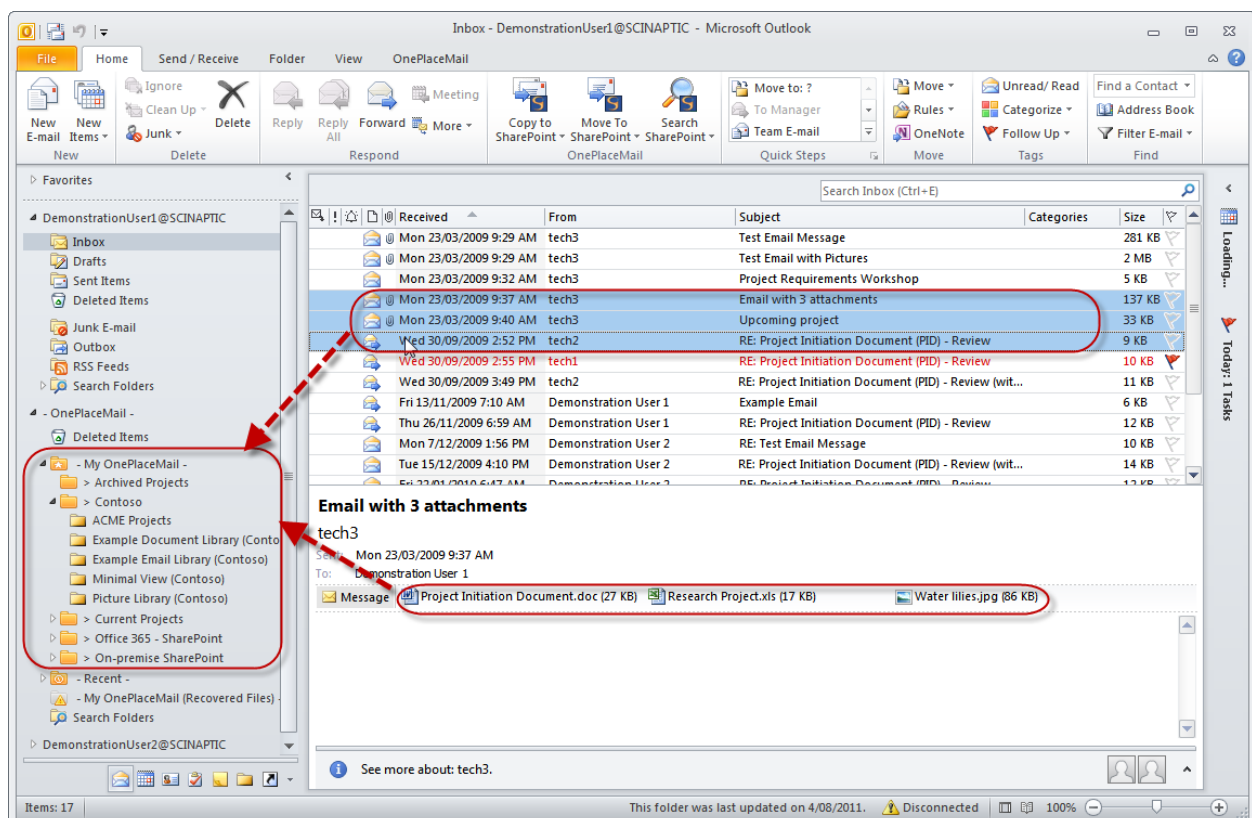
Confirmation of your connection to SharePoint

Manage My OnePlaceMail Folders (Favorites) in Outlook

1.1.1 What is the My OnePlaceMail area?

The My OnePlaceMail (Favorites) area is located on the left navigation pane of Microsoft Outlook and is where you can add (bookmark) one or more Microsoft Outlook folders to represent direct links to SharePoint locations (libraries, lists, library folders or document sets). You can also add a SharePoint Site as a favorite location and subsequently drag/drop content to the SharePoint site.

The SharePoint locations (represented as Outlook Folders) can be included in a folder structure reflecting your current work patterns/projects and/or your personal Information Management preferences. Thereby, maintaining an intuitive and highly productive environment within Microsoft Outlook for you to file information directly into SharePoint.



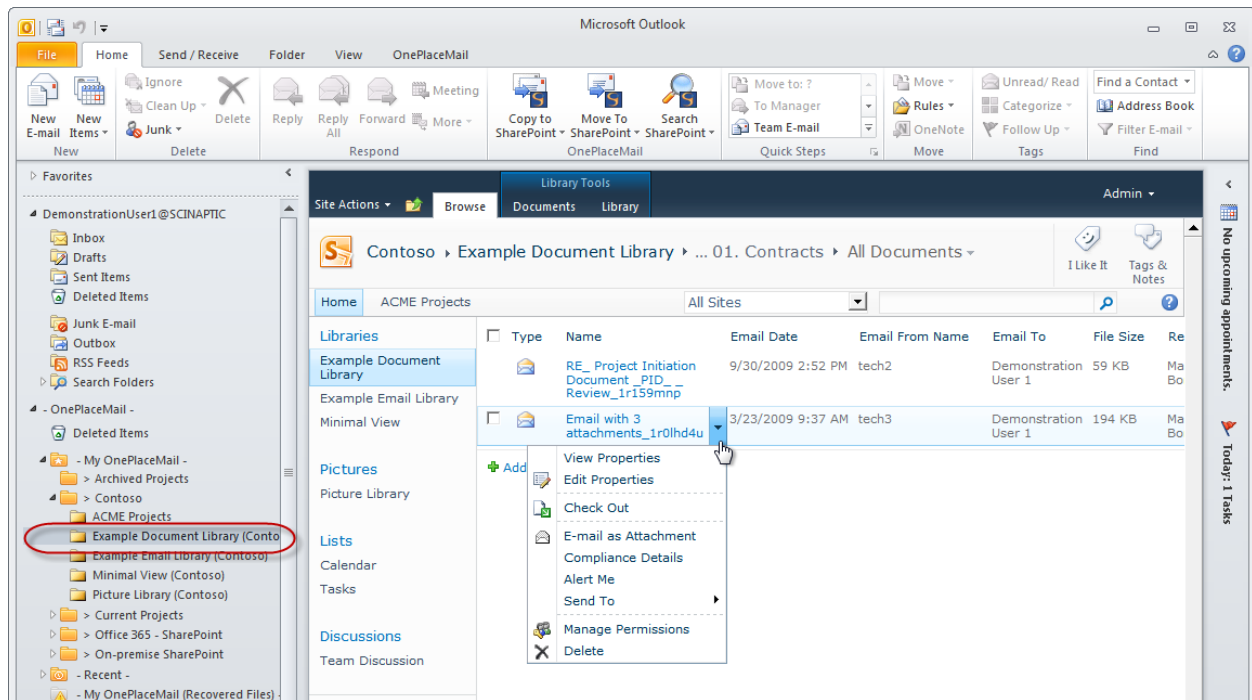
Drag & Drop emails or attachments to left navigation

Tip: The folder structure and SharePoint locations in the My OnePlaceMail (left navigation pane of Outlook) can be managed directly by the current Outlook user or can be centrally managed and deployed across one or more different user groups within the business (OnePlaceMail Enterprise Edition only). Please refer to the Administrator Guide for detailed instructions on central deployment and configuration options for OnePlaceMail.

You can simply drag & drop email messages or specific attachments from an email message directly into a folder within the My OnePlaceMail area. This will save the items to the associated SharePoint location.

In the case of saving emails, all associated email attachments are retained and saved with email in SharePoint (email format: .msg file)

The folders under My OnePlaceMail represent a live connection to SharePoint. Therefore, if you click on the folders, you can view SharePoint content and access the full power of SharePoint directly from within Outlook.



Access SharePoint content and functionality from within Microsoft Outlook

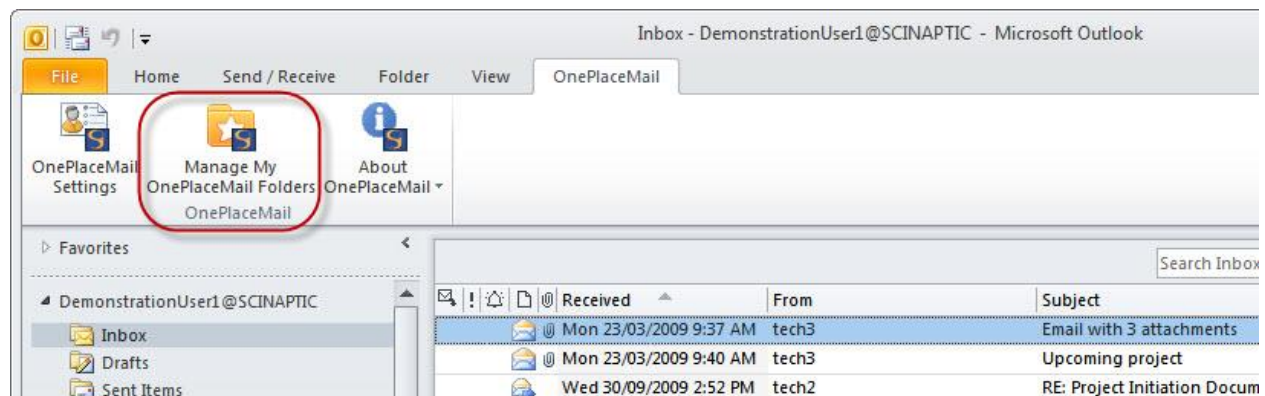
Note: You are not restricted to the defined My OnePlaceMail libraries/lists locations when uploading content. You can save files to any other SharePoint library/list where you have appropriate access. Please refer to the section below describing the Save to SharePoint Window.

1.1.2 Manage My OnePlaceMail Folders

The Manage My OnePlaceMail Folders window provides the ability to manage the My OnePlaceMail area on the left navigation in Outlook. This is where you can add/remove one or more libraries/lists from SharePoint into Outlook to facilitate the transfer of emails and attachments.

Adding libraries/lists to the My OnePlaceMail area in Outlook

To add libraries/lists to the My OnePlaceMail area in Outlook, Click **OnePlaceMail** on the menu and select **manage My OnePlaceMail Folders**.



Select Manage My OnePlaceMail Folders (Favorite Locations)

The Manage My OnePlaceMail Folders window will appear.

My OnePlaceMail

This area represents the current Outlook folder hierarchy as shown in the left hand navigation of Outlook. The folder hierarchy can be setup to meet the requirements of the Outlook User.

SharePoint Location (libraries/lists, folders, document sets)

The left hand side of the window displays the SharePoint Sites and locations for the currently defined site collections.

The hierarchy of Sites and associated locations adheres to the current users security permissions. Therefore, only the locations where you have access are displayed.

You can add one or more locations to the My OnePlaceMail Area. This can be libraries, lists, library folders or document sets

Folder Settings

This area provides the Folder Settings for the currently selected location in the My OnePlaceMail area.

Each location can use either the Default Settings (as defined in the OnePlaceMail – Settings dialog) or can be overridden with specific settings.

OnePlaceMail - Manage My OnePlaceMail Folders

Recent -

- Example Document Library (Contoso)
- Tasks (oneplacemail.sharepoint.com/sites/Contoso/Lists)
- Example Email Library (Contoso)

SharePoint -

...Click to Add SharePoint Connection...

- http://vs-server98
- https://oneplacemail.sharepoint.com/sites/Contoso
- Announcements
- Calendar
- Example Document Library
- Example Email Library
- Form Templates
- Minimal View
- Picture Library
- Site Assets
- Style Library
- Tasks
- ACME Projects

My OnePlaceMail -

- > Archived Projects
- > Contoso
- ACME Projects
 - Example Document Library (Contoso)
 - Example Email Library (Contoso)
 - Minimal View (Contoso)
 - Picture Library (Contoso)
- > Current Projects
- > Office 365 - SharePoint
- > On-premise SharePoint

Remove Rename

Folder Settings - Example Document Library (Contoso)

☐ Use Default Save Settings

When saving, prompt for properties:

☒ Always

☐ Never

☒ Suppress Save Results Window

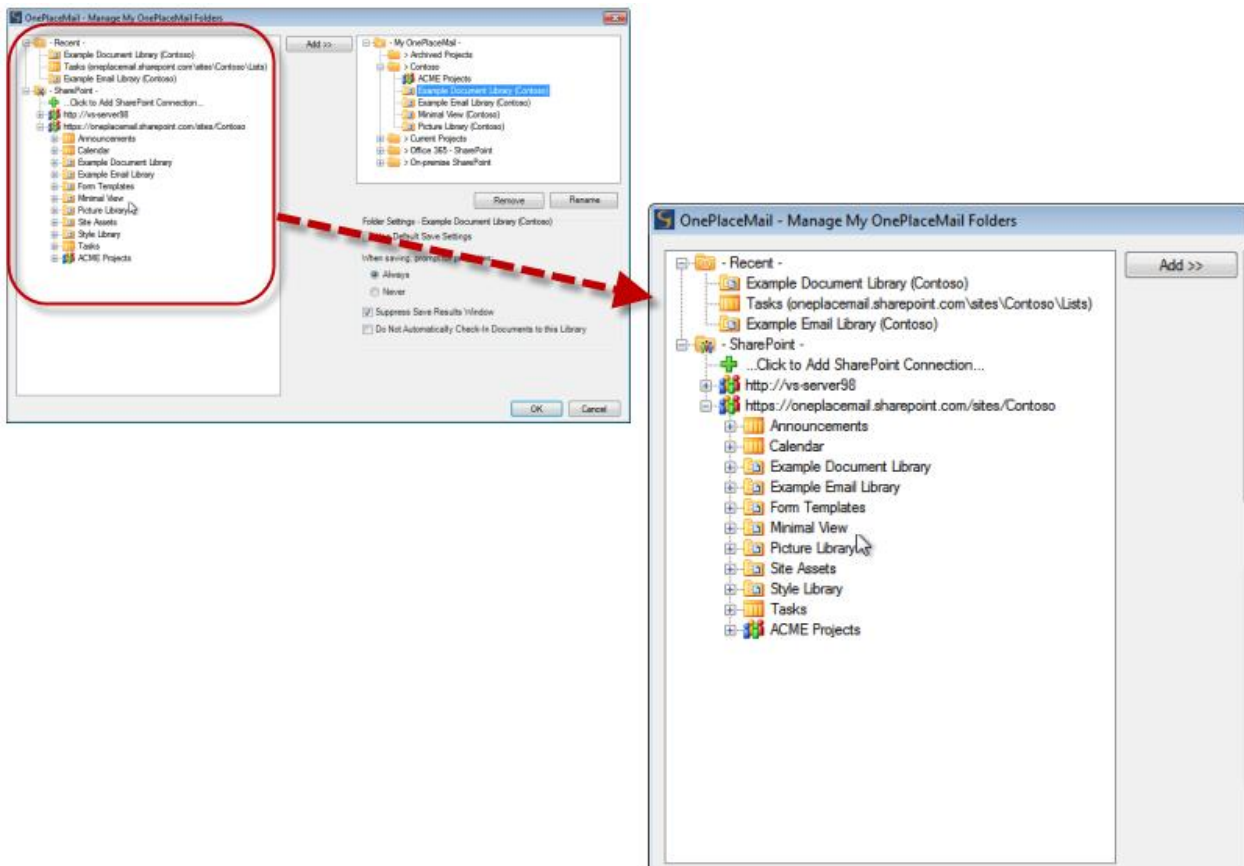
☐ Do Not Automatically Check-In Documents to this Library

OK Cancel

Manage My OnePlaceMail Folders - SharePoint Libraries/Lists

On the left hand side of the window, OnePlaceMail presents a navigation tree of SharePoint based on your security permissions and the Site Collections you are connected to.

SharePoint libraries, lists, folders, Document Sets and Sites can be added to the right hand side of the window which represents the My OnePlaceMail area on the left navigation of Outlook.



Navigate SharePoint Structure (with respect to security permissions) and select locations

Recent

The Recent Locations area shows the SharePoint libraries, lists, folders or document sets where you have recently saved content. You can drag/drop Recent Locations or use the 'Add >>' button to the right hand side of the window to make a recent a permanent favorite location.

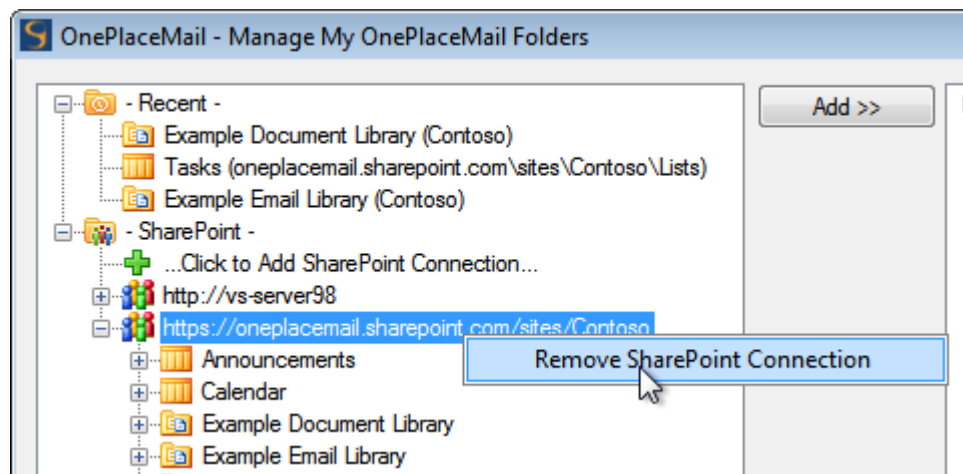
Add SharePoint Connection

You can add one or more connections to SharePoint Site Collections using the 'Add SharePoint Connection'.



Remove SharePoint Connection

To remove a SharePoint Connection, you can Right-Click on the SharePoint Connection and select 'Remove SharePoint Connection'.



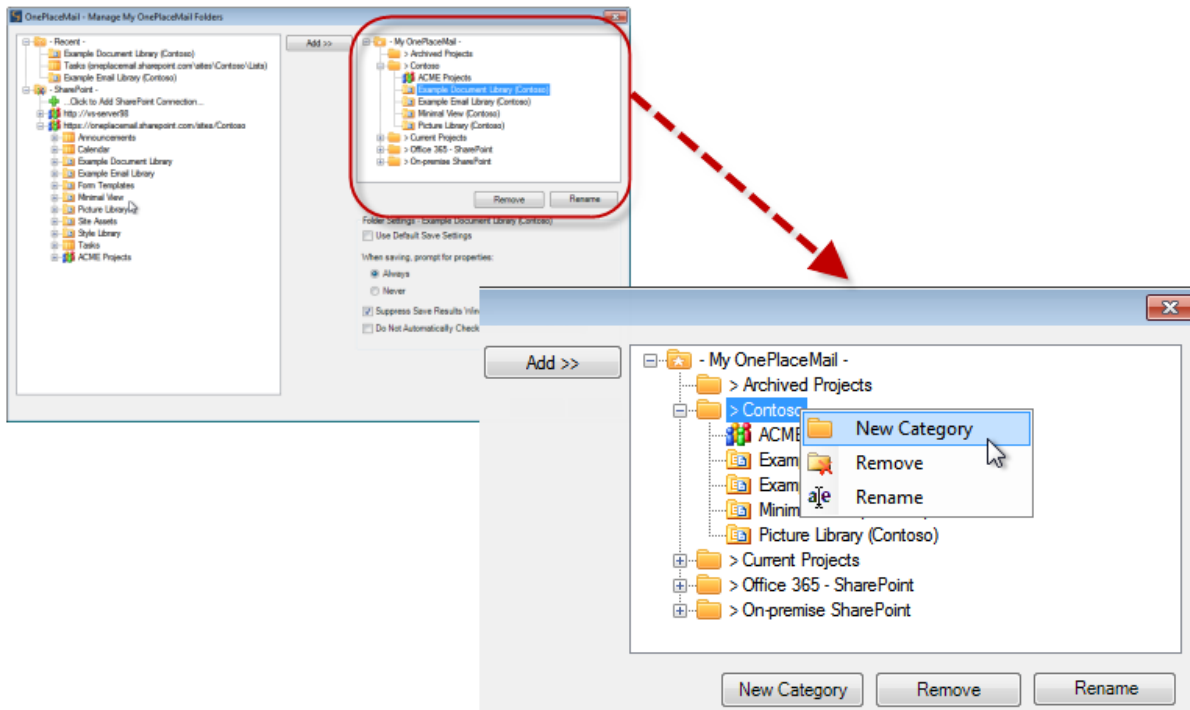
SharePoint Locations

Select a location (library, list, library folder, document set or site) you wish to add to your My OnePlaceMail area from the left hand side tree structure and click 'Add >>'. Repeat this step for as many locations as you would like to see in the My OnePlaceMail area.

Tip: You can also drag/drop the locations from the SharePoint structure on the left hand side to the relevant location within the My OnePlaceMail folder structure on the right hand side of the window.

Manage My OnePlaceMail Folders - My OnePlaceMail

The My OnePlaceMail area on the left navigation of Outlook is managed within this area of the window.



Define a category structure and add favorite SharePoint locations

The My OnePlaceMail area allows for the creation of a folder category structure containing SharePoint locations to meet the work practices and requirements of the current user. The SharePoint locations can also be renamed for display purposes in Outlook without changing/impacting the libraries, lists, folders or sites in SharePoint.

The flexibility provided by OnePlaceMail is extremely powerful as it allows the user to structure libraries/lists within a hierarchy that is both relevant and streamlined for the personal information management requirements and work practices of the current user.

Note: The My OnePlaceMail category folders (Folder within Outlook) can be defined and deployed centrally through the configuration update process (OnePlaceMail Enterprise Edition only). This is useful if you would like to automate the rollout of new SharePoint locations to one or more users. The locations can be deployed within a consistent category folder structure. All aspects of the category folders and libraries/list can be managed via the config_update.xml process (See Administrator Guide for details).

New Category

The New Category button will create a new category folder within the currently selected category folder hierarchy. One or more locations can be added under a category folder.

Remove

The Remove button will remove the currently selected category folder or location. If a category folder is removed, all sub category folders and locations will also be removed.

Rename

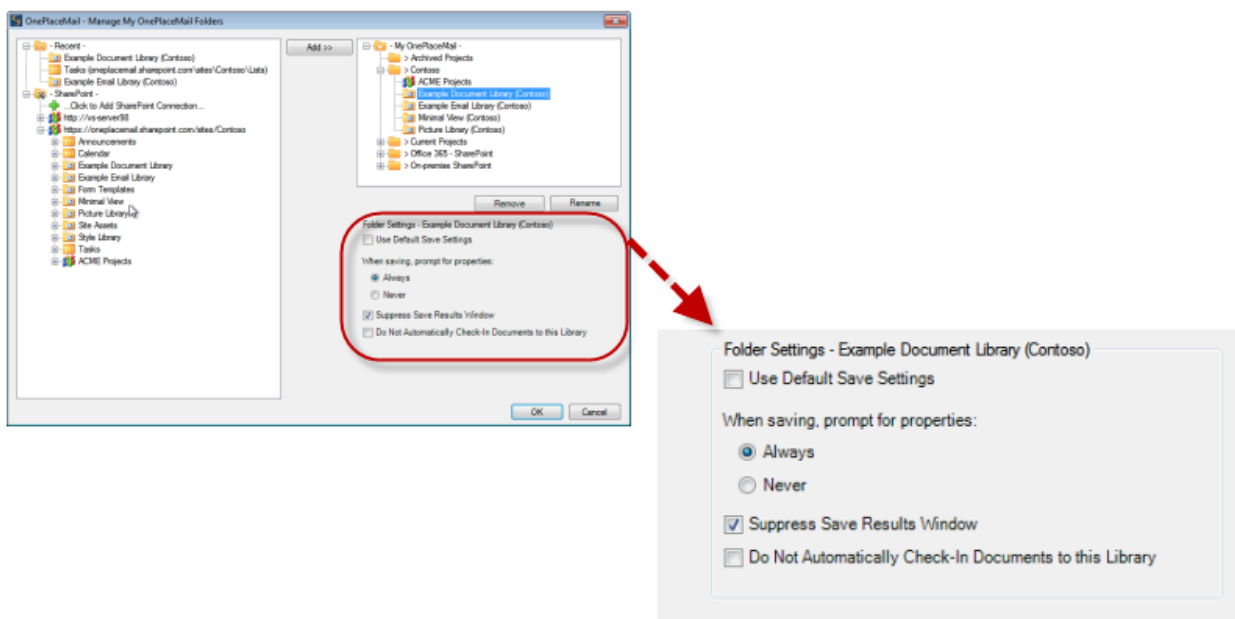
The Rename button allows the user to rename a category folder or a location. Renaming a location will not impact the associated library, list, folder or document set name in SharePoint.

Folder Settings

Each location selected to appear in the My OnePlaceMail area can be configured to work in a specific manner when items are saved to this location in SharePoint. Each library/list may use the globally defined Default Settings or can be overridden for the specific business requirements by deselecting 'Use Default Settings'.

Select a location on the right hand side and apply the appropriate Folder Settings.

Note: All My OnePlaceMail Manage Folder settings can be set centrally through the configuration update process (OnePlaceMail Enterprise Edition only). The settings can also be set to 'non-editable' by the end user (see Administrator Guide for details).



Define the Save process for each location or use the global default settings

Use Default Save Settings:

The OnePlaceMail Setting area provides the ability to define the default behavior when saving content to SharePoint. Deselecting this option, allows you to override the setting for a specific location in SharePoint.

When saving, prompt for properties: Always

If selected, the Save to SharePoint window will appear when saving content to this location in SharePoint. The save to SharePoint window provides the opportunity to enter additional metadata and/or select other filing locations within SharePoint. Email attributes are automatically captured when saving from Outlook.

When saving, prompt for properties: Never

If selected, the Save to SharePoint window will not appear unless validation for the items being saved is not satisfied. Email attributes are automatically captured when saving from Outlook.

Suppress Save Results Window (OnePlaceMail Enterprise Edition only)

Enabling this option will suppress the Save Results Window from appearing. However, the window will still appear on the exception where there is an unsuccessful save attempt for emails/files.

Do Not Automatically Check-in Document to this Library

This option is only visible in the **Manage My OnePlaceMail Folders** window if a document library or folder within a document library has been selected. If this option has been enabled, documents saved to this library will be uploaded in a 'Checked-out' status. By default this option is not enabled, therefore, documents are automatically checked into libraries.

Note: The locations and associated settings can be centrally configured and deployed across the enterprise (OnePlaceMail Enterprise Edition only). See the Administrator Guide for details

The flexibility provided with the Folder Settings enables you to configure the behavior of OnePlaceMail for a number of different business scenarios. Therefore, OnePlaceMail can be implemented to meet many different requirements across the business.

Save My OnePlaceMail Configuration

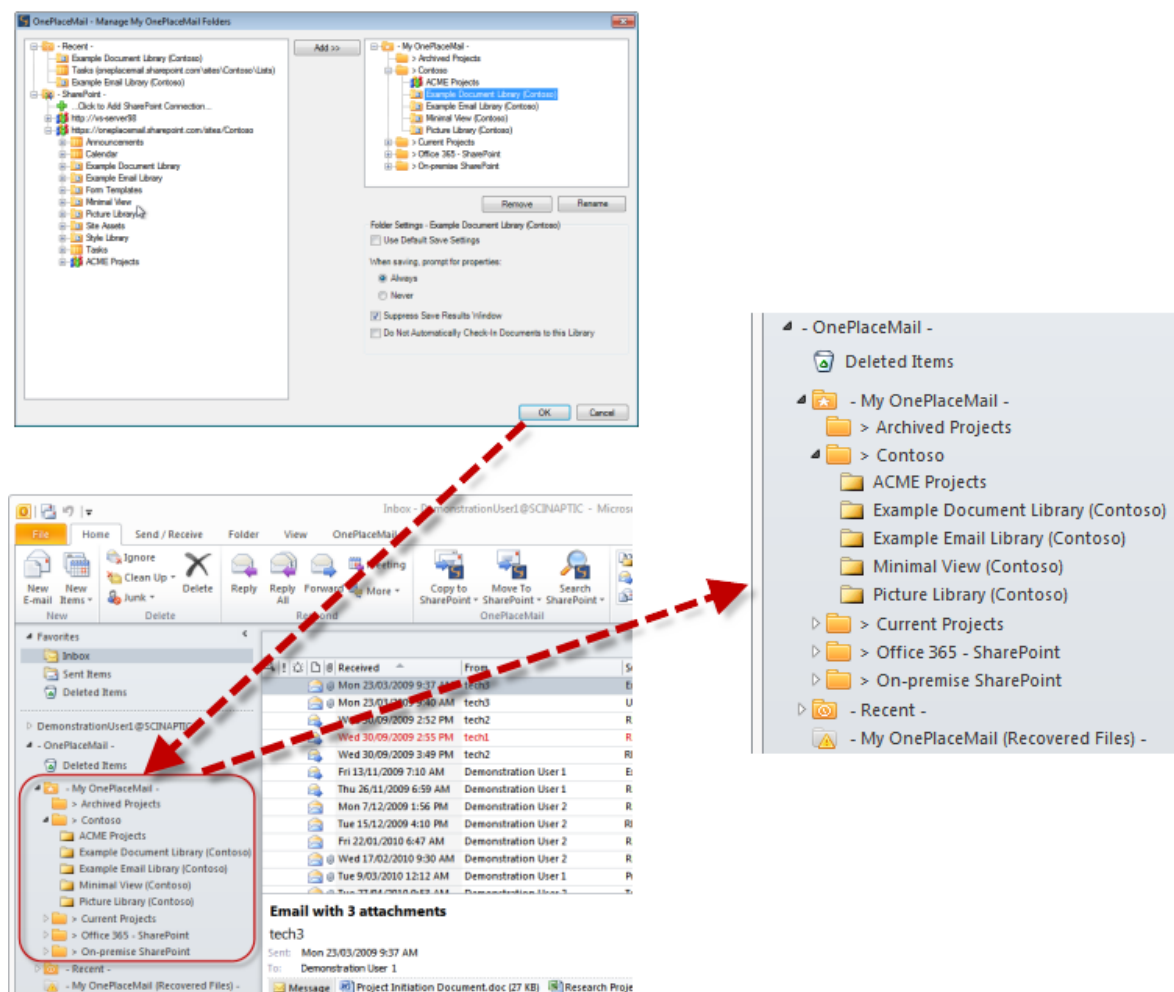
Once you have completed all your selections in the Manage My OnePlaceMail Folders window, click **OK**.

The SharePoint locations are now available and represented as folders on the left navigation pane of Outlook under the My OnePlaceMail area. The My OnePlaceMail folders allow you to:

- Click on the folders to view the SharePoint library/list content in real-time. The folders also expose the full power of SharePoint directly within the Microsoft Outlook interface.
- Drag & drop emails or specific attachments directly from your inbox to SharePoint. This is a real-time connection and allows you to immediately and securely share content across the enterprise.

My OnePlaceMail - Folders within Outlook

The locations are displayed in the category folder structure as defined in the My OnePlaceMail Folders window. The category folders are denoted by the '>' prefix applied to the folder.



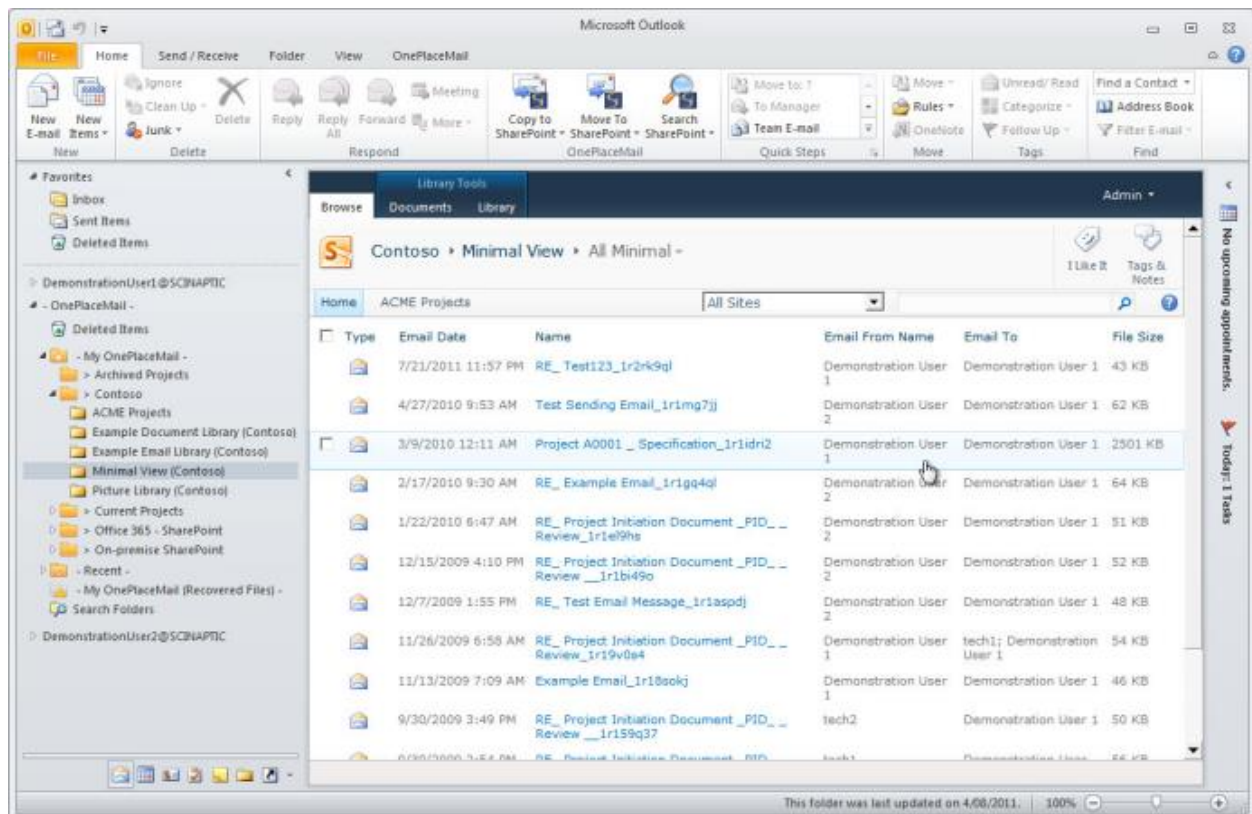
Favorite locations available on the left navigation of Outlook

SharePoint Default View or Minimal View

The content of the SharePoint library/list can be accessed in real-time by clicking on the folder as shown below. By default, OnePlaceMail will display the default SharePoint library/list view.

OnePlaceMail also supports displaying a custom view defined by the SharePoint Administrator. This is known as the 'Minimal view'. An Administrator can define a view which is different to the default SharePoint view and have this view present when accessing the SharePoint location via Outlook.

The example below shows the library view without the left navigation structure normally shown in SharePoint views (achieved using a SharePoint Master Page).



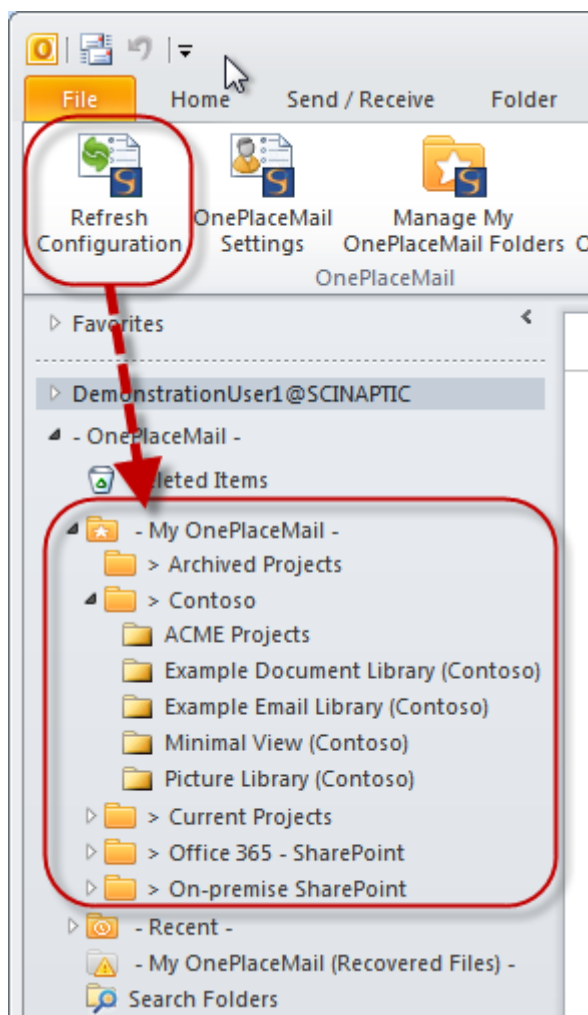
Access SharePoint from within Outlook with control over the look & feel (Minimal View)

1.1.3 Adding/Removing SharePoint Locations to Outlook

If enabled by your Administrator, the 'Refresh Configuration' button (this can be renamed) provides the capability for automating the process of adding/removing SharePoint locations to the left navigation of Outlook. The Refresh configuration button can also update many OnePlaceMail settings as defined in the Administration guide.

Tip: Refer to the 'OnePlaceMail - How to Deploy OnePlaceMail Client Configuration using a Custom Web Service.pdf' guide on the OnePlaceMail website (or in your software download) for detailed instructions on how you can automate the creation and deployment of SharePoint save locations to be embedded in desktop applications such as Outlook.

These same locations are also available when saving content from File Explorer and Office (Word, Excel and PowerPoint).



Refresh Configuration – including SharePoint locations (If configured by your Administrator)

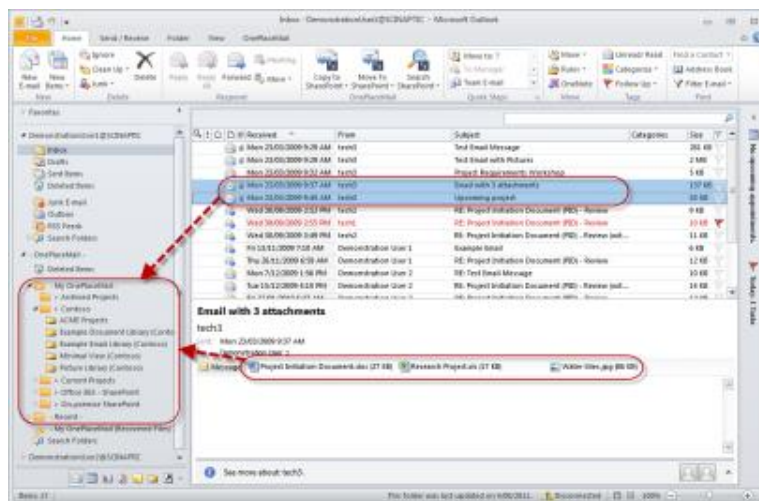
Save from Outlook to SharePoint

Step 1: Drag & Drop Emails or Attachments

Drag & Drop emails and/or attachments from your Inbox to SharePoint locations via the My OnePlaceMail folders area

Key Points:

1. Seamless and intuitive drag/drop process
2. Email attributes are automatically captured
3. Supports libraries, lists, folders and document sets

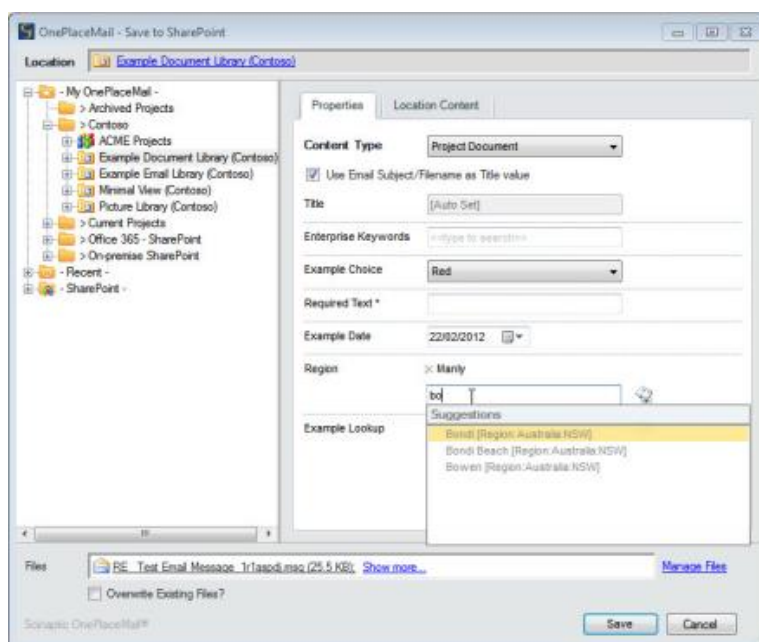


Step 2: (Optional) Display Save to SharePoint Window

Optionally, the **Save to SharePoint Window** will be displayed to complete additional metadata.

Key Points:

1. Streamlined interface for completing metadata
2. Adheres to SharePoint default values, required columns, etc...
3. If required, rename files during the upload process

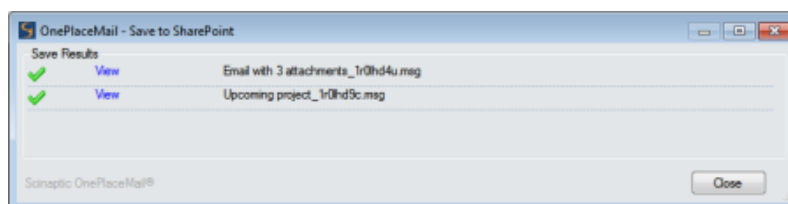


Step 3: (Optional) Display Save Results Window

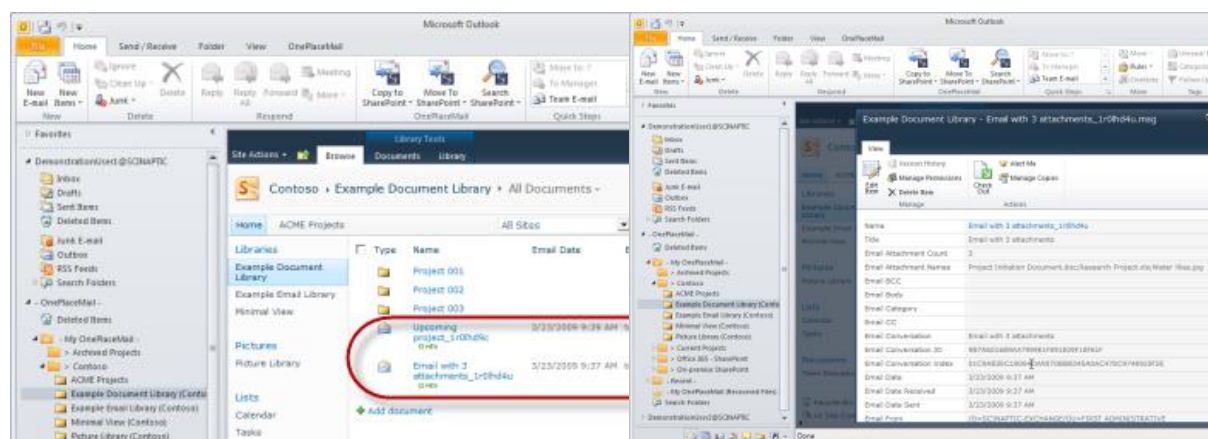
Optionally, the **Save Results Window** will display.

Key Points:

1. See results immediately
2. Simply View or Edit saved items to initiate workflows and or perform further actions on items



Result: SharePoint - Access from Outlook



Open emails from SharePoint

View captured email attributes

Key Points:

1. Emails are stored in the .MSG format within SharePoint
2. Access uploaded content directly from within Microsoft Outlook
3. Emails are tagged as 'Transferred to SharePoint' in the case of performing a Copy
4. Seamless Save to SharePoint process with flexibility to define the required upload options on a library by library basis

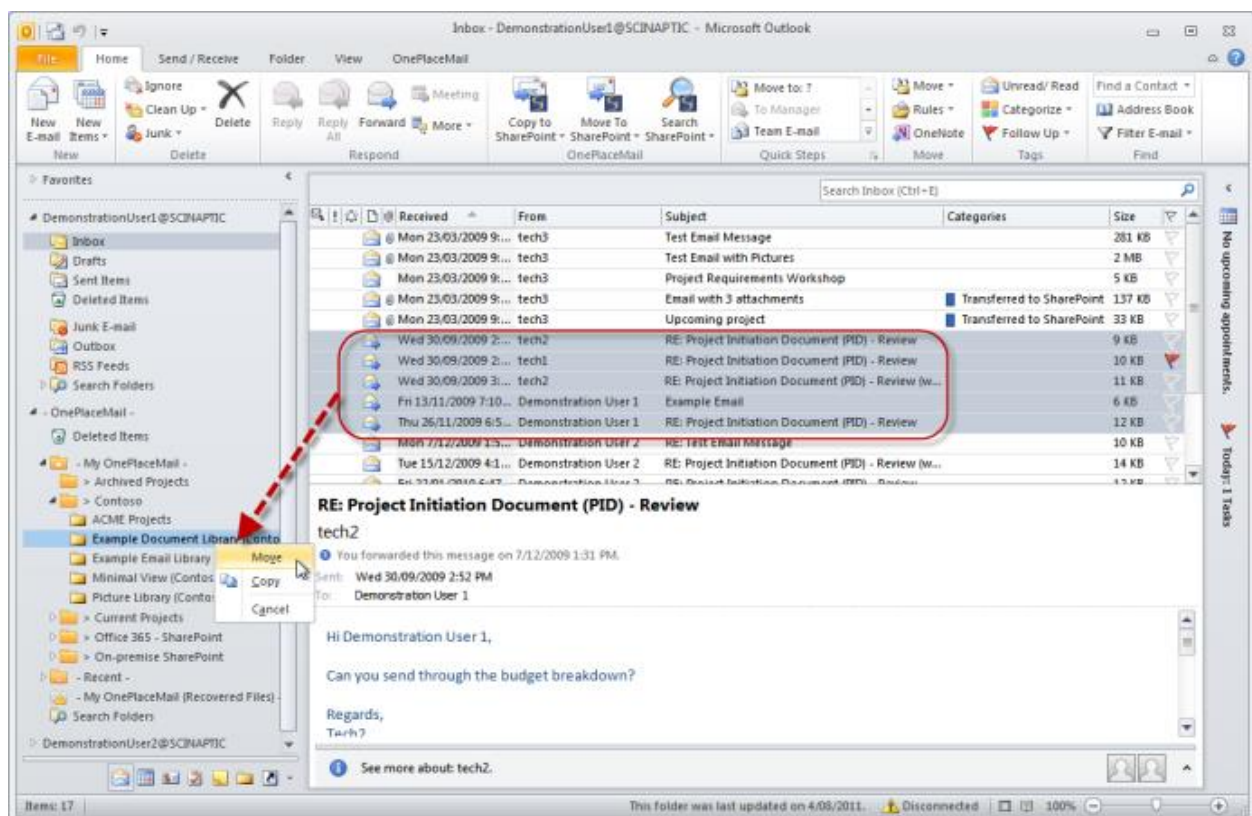
1.2 Step 1: Drag & Drop Emails or Attachments

OnePlaceMail provides a seamless, yet highly flexible and powerful process for transferring content from Microsoft Outlook to Microsoft SharePoint.

1.2.1 Drag-and-Drop Emails (may or may not contain attachments)

You can save **one or more emails (that may contain attachments)** to SharePoint. Simply drag-and-drop emails to the appropriate SharePoint location folder in the My OnePlaceMail area in Outlook.

The emails and all associated email attachments will be transferred to SharePoint and stored in the native .msg format (email attributes are automatically captured). The .msg format enables the email to be re-opened in Microsoft Outlook to reply, forward or perform any other standard Outlook action.

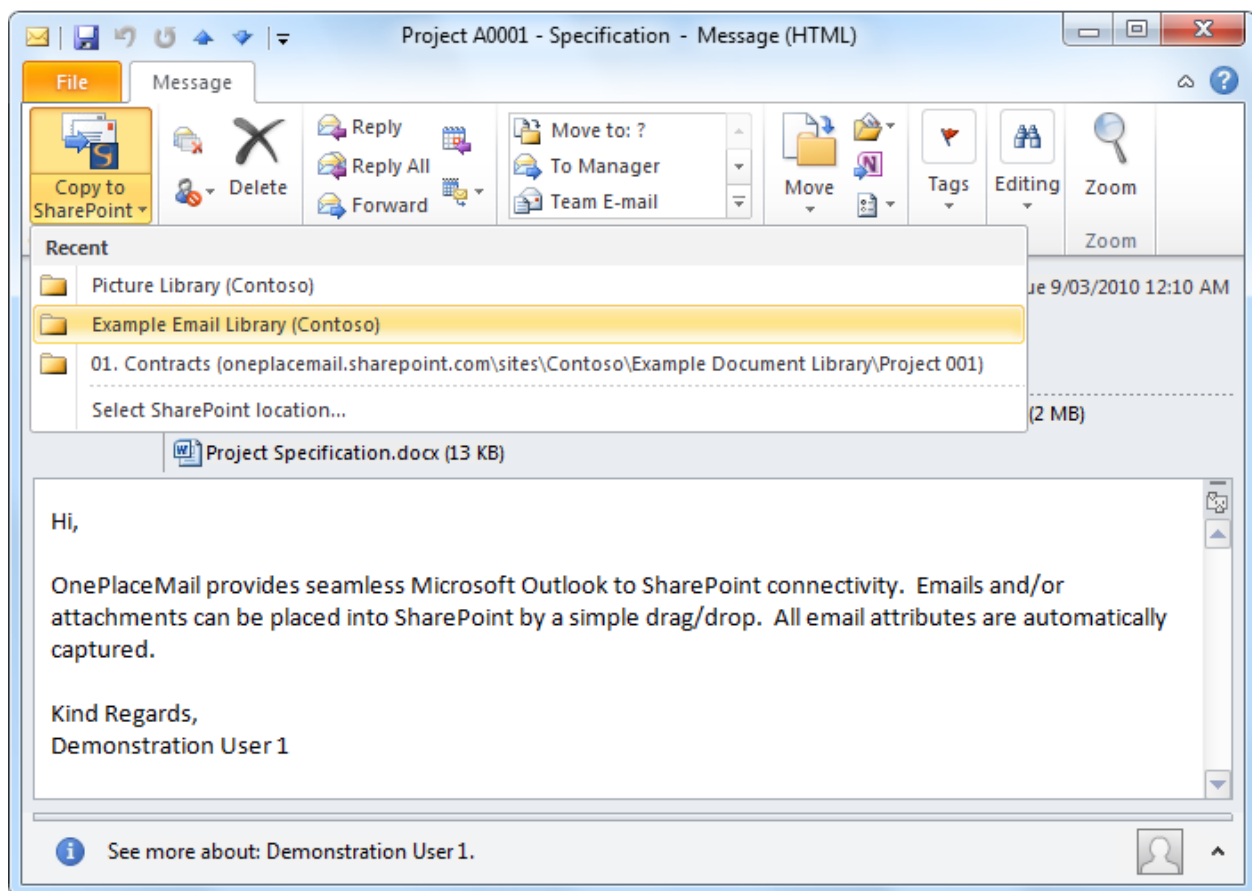


Drag & drop emails to SharePoint

Note: There is an important distinction between performing a drag-and-drop with the left mouse and the right mouse buttons:

- Left – The left mouse button does a 'move' operation so once the message is uploaded to SharePoint it will be removed from Outlook.
- Ctrl + Left – Hold down Ctrl and click the left mouse button performs a 'copy' operation. A copy operation retains the message in Outlook and creates a copy in SharePoint
- Right – The right mouse button will pop up a menu (see screenshot above) asking whether you wish to perform a move or copy.

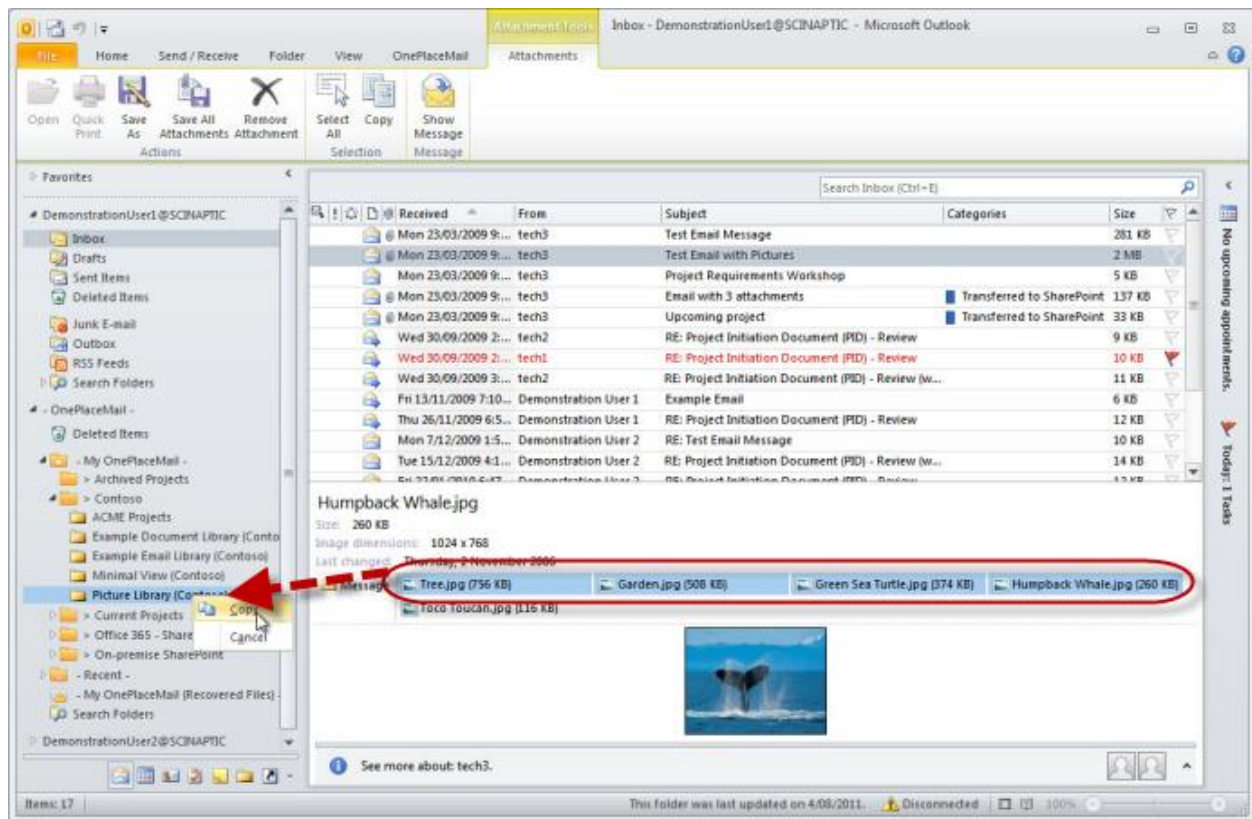
From within an open email message you can use the 'Copy to SharePoint' button.



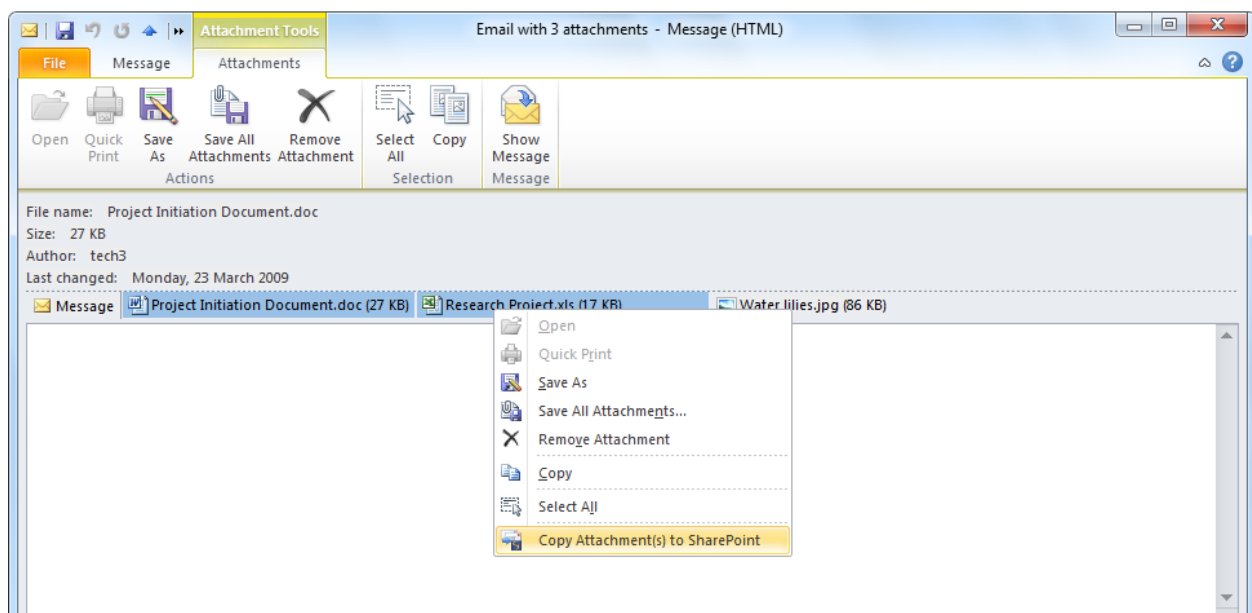
Copy to SharePoint from an open email message

1.2.2 Drag-and-Drop or Right Click Attachments Separately

You can also upload **one or several attachments separately from the email message**. Simply drag-and-drop the attachments out of the email message into the desired SharePoint location or use the Right-Click Copy to SharePoint.



Drag & drop email attachments to SharePoint



Right Click – Copy to SharePoint

1.2.3 Automatic Capture of Email Metadata for Emails and Attachments

OnePlaceMail automatically captures email metadata (To, CC, Subject, Category, etc...) upon upload. Email metadata is captured for both transferred emails and for attachments transferred separately from the email. The email metadata along with any additional metadata is captured and is available in SharePoint for creating views. The metadata is also indexed for search purposes.

1.2.4 Support for Libraries/Lists

OnePlaceMail supports SharePoint libraries (Document/Picture), lists (Tasks, Issues, Contacts, Events, Announcements and Custom lists), library folders and document sets as destination SharePoint locations.

1.3 Step 2: (Optional) Display Save to SharePoint Window

Optionally, the Save to SharePoint Window can be displayed when saving content to a SharePoint location.

The Manage My OnePlaceMail Folder Settings area is where you enable/disable the Save to SharePoint window for a specific location.

The Save to SharePoint window allows the completion of additional SharePoint metadata.

OnePlaceMail - Save to SharePoint

Location: **Example Document Library (Contoso)**

Properties | Location Content

Content Type: Project Document

☒ Use Email Subject/Filename as Title value

Title: [Auto Set]

Enterprise Keywords: <<type to search>>

Example Choice: Red

Required Text *:

Example Date: 22/02/2012

Region: X Manly

Example Lookup: bo |

Suggestions:

- Bondi [Region:Australia:NSW]
- Bondi Beach [Region:Australia:NSW]
- Bowen [Region:Australia:NSW]

Files: RE_Test Email Message_1r1aspdj.msg (25.5 KB); [Show more...](#) [Manage Files](#)

☐ Overwrite Existing Files?

Scinaptic OnePlaceMail®

Save **Cancel**

Managed Metadata with full type-ahead

1.3.1 Save to SharePoint Window

If enabled for the location in the Manage My OnePlaceMail Folders, the Save to SharePoint window will be presented when saving content to the location. The Save to SharePoint window is a highly powerful and efficient process for capturing additional filing information as defined by the destination location.

Location

The selected location from My OnePlaceMail is displayed as a link in the Location area.

The text is a hyperlink which will open a web browser to the SharePoint location.

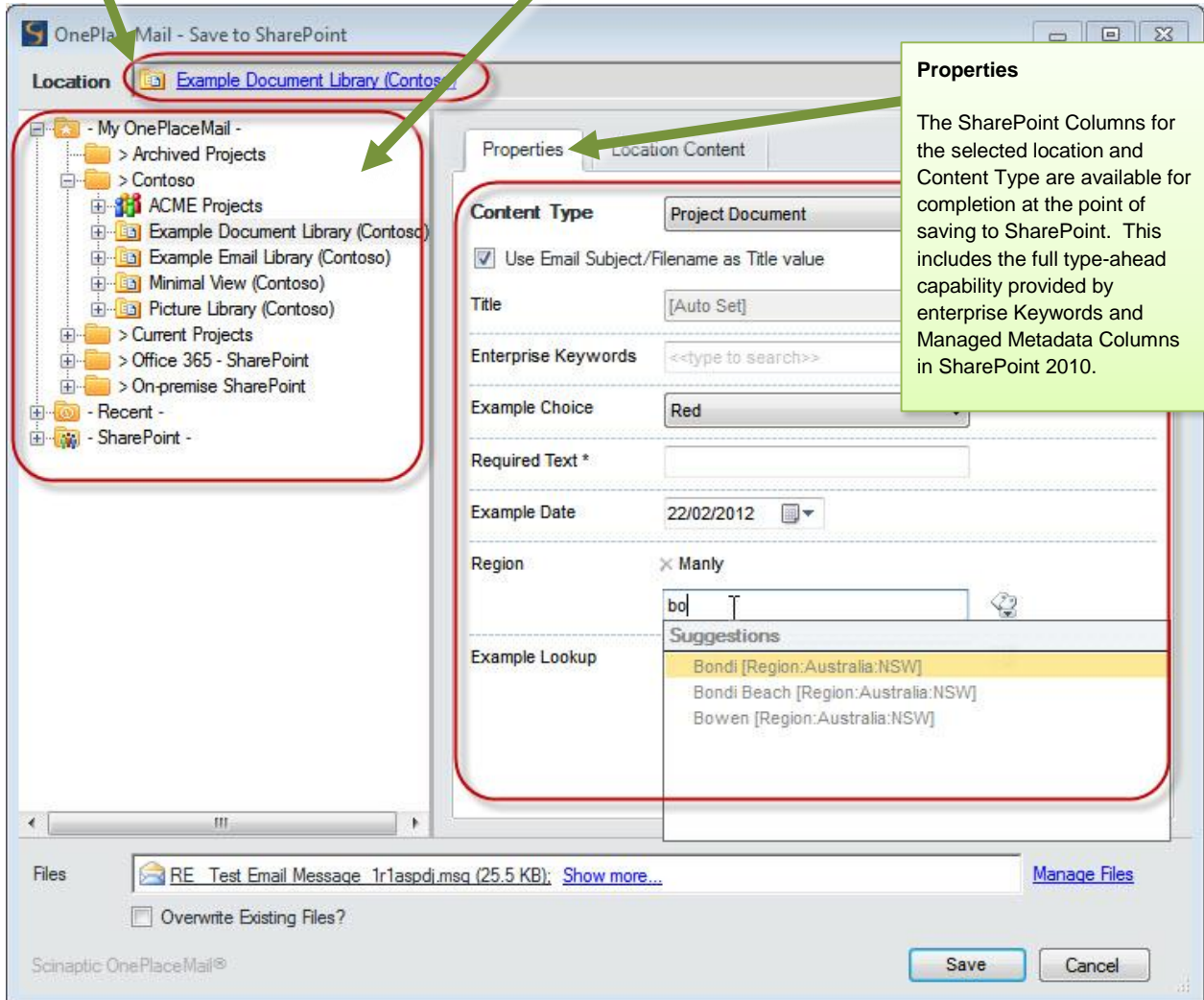
My OnePlaceMail

Your defined SharePoint locations are listed in the left tree structure.

The ' - SharePoint - ' folder at the bottom also allows you to select other locations from within your SharePoint environment. This folder can be disabled.

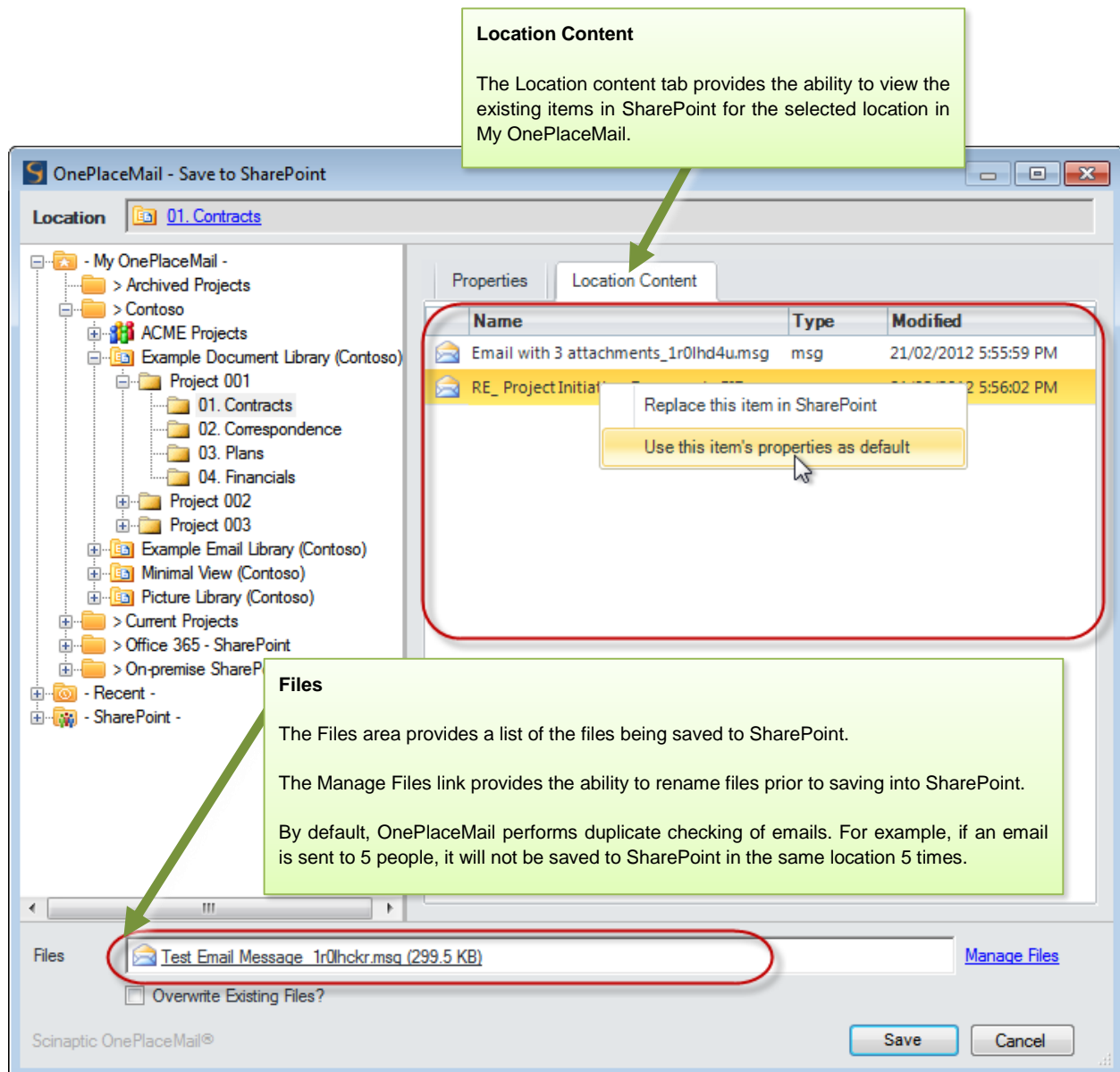
Properties

The SharePoint Columns for the selected location and Content Type are available for completion at the point of saving to SharePoint. This includes the full type-ahead capability provided by enterprise Keywords and Managed Metadata Columns in SharePoint 2010.



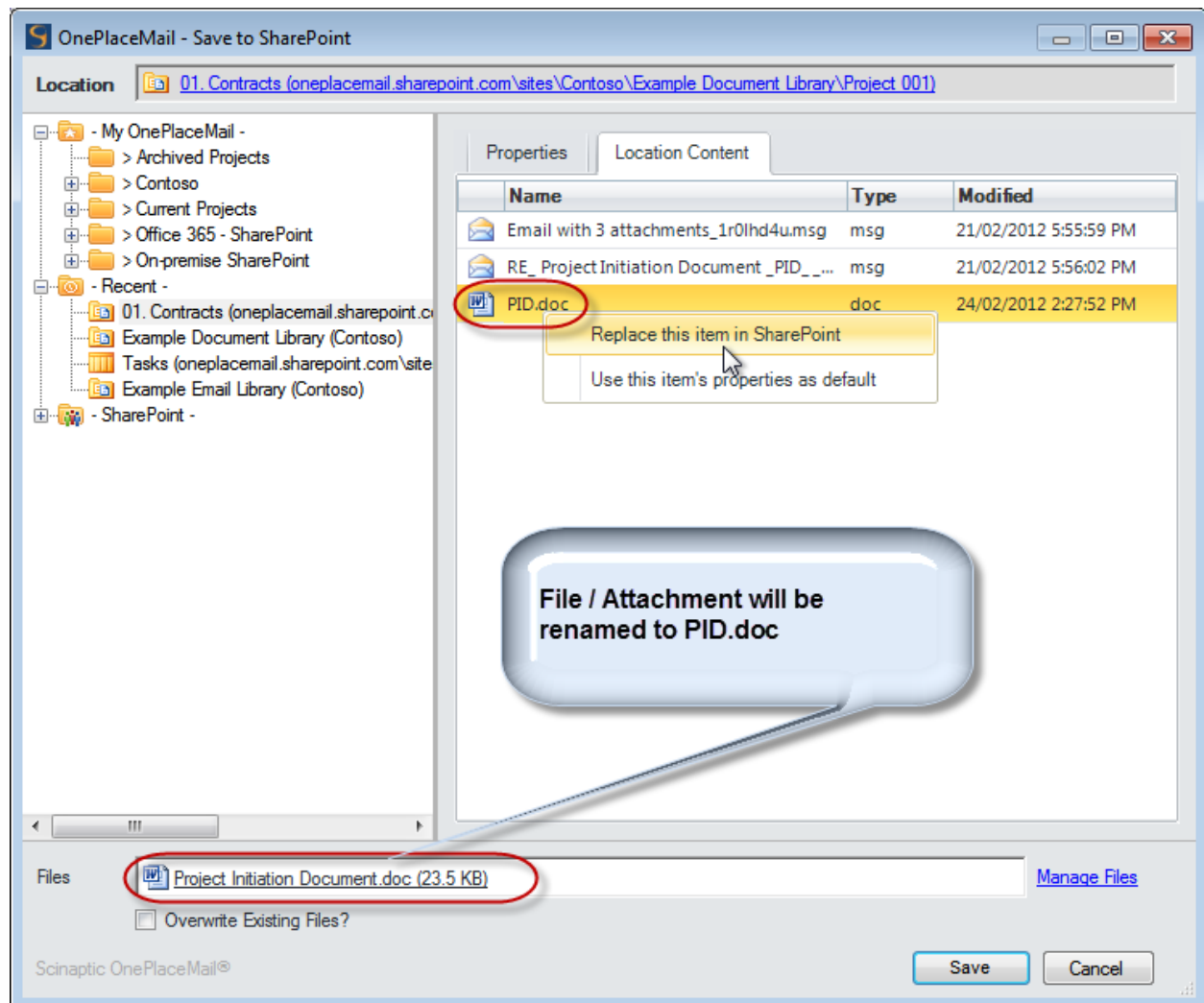
1.3.2 Copy Metadata from an existing Item

To streamline data entry, right click on an existing SharePoint item and copy metadata as the default for current files being saved.



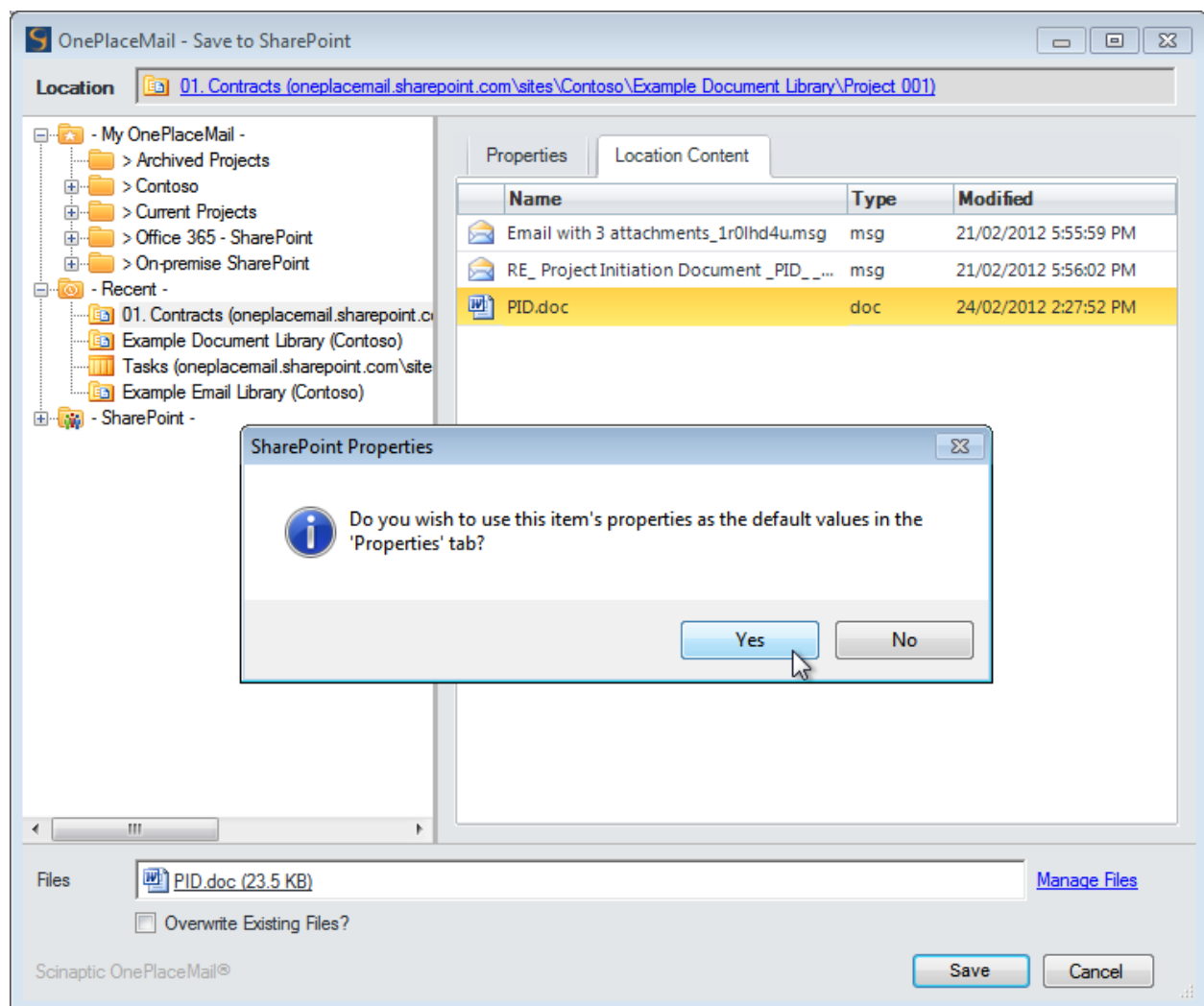
1.3.3 Replace an existing Item in SharePoint

Often you receive email attachments which have a different name to an existing file you would like to replace in SharePoint. Using OnePlaceMail, you can simply right-click on the existing item you would like to replace and select 'Replace this item in SharePoint'. This will rename the file being saved to be the same as in SharePoint.



Replace item in SharePoint (Save As / Rename) and version item if enabled

The user will be presented the option to use the existing item metadata as default for the new file being saved.

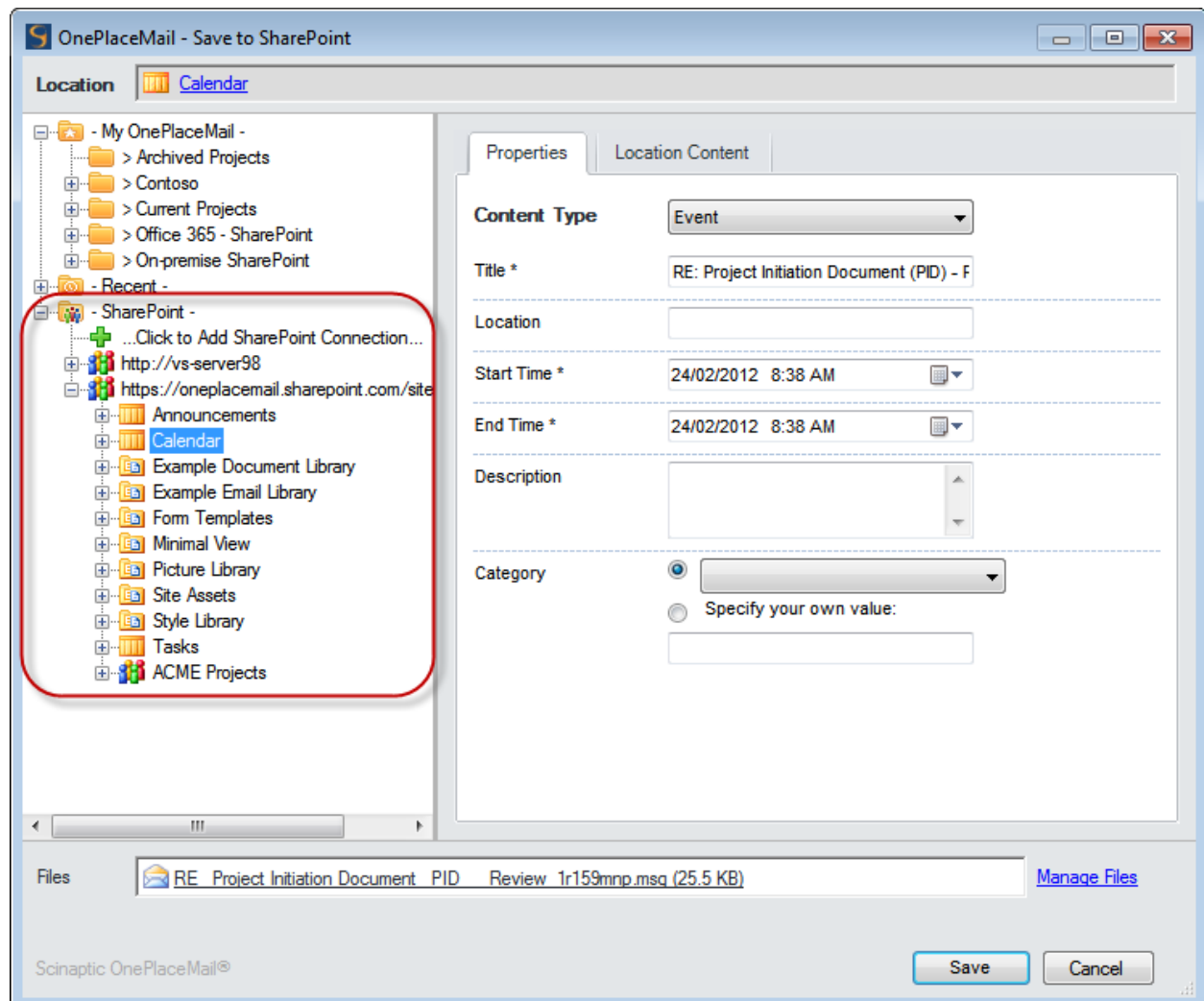


Use existing metadata as defaults

1.3.4 Other SharePoint locations

SharePoint locations not defined in the My OnePlaceMail area can also be selected by clicking on the ' – SharePoint – ' folder in the tree navigation.

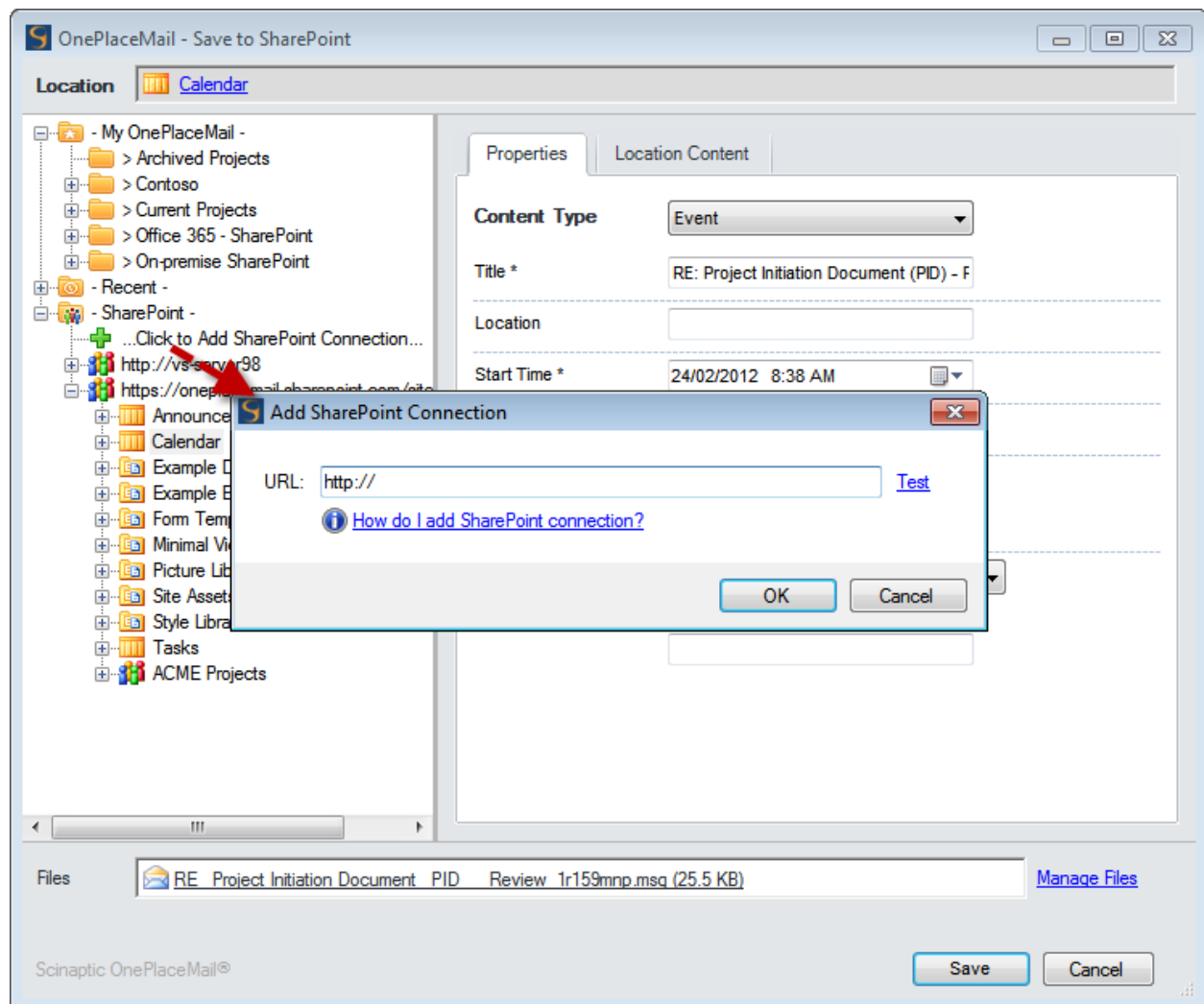
OnePlaceMail adheres to the SharePoint security settings defined for sites, libraries, lists and folders. Therefore, you will only see locations you have access to view.



Browse SharePoint (security trimmed)

Add SharePoint Connection

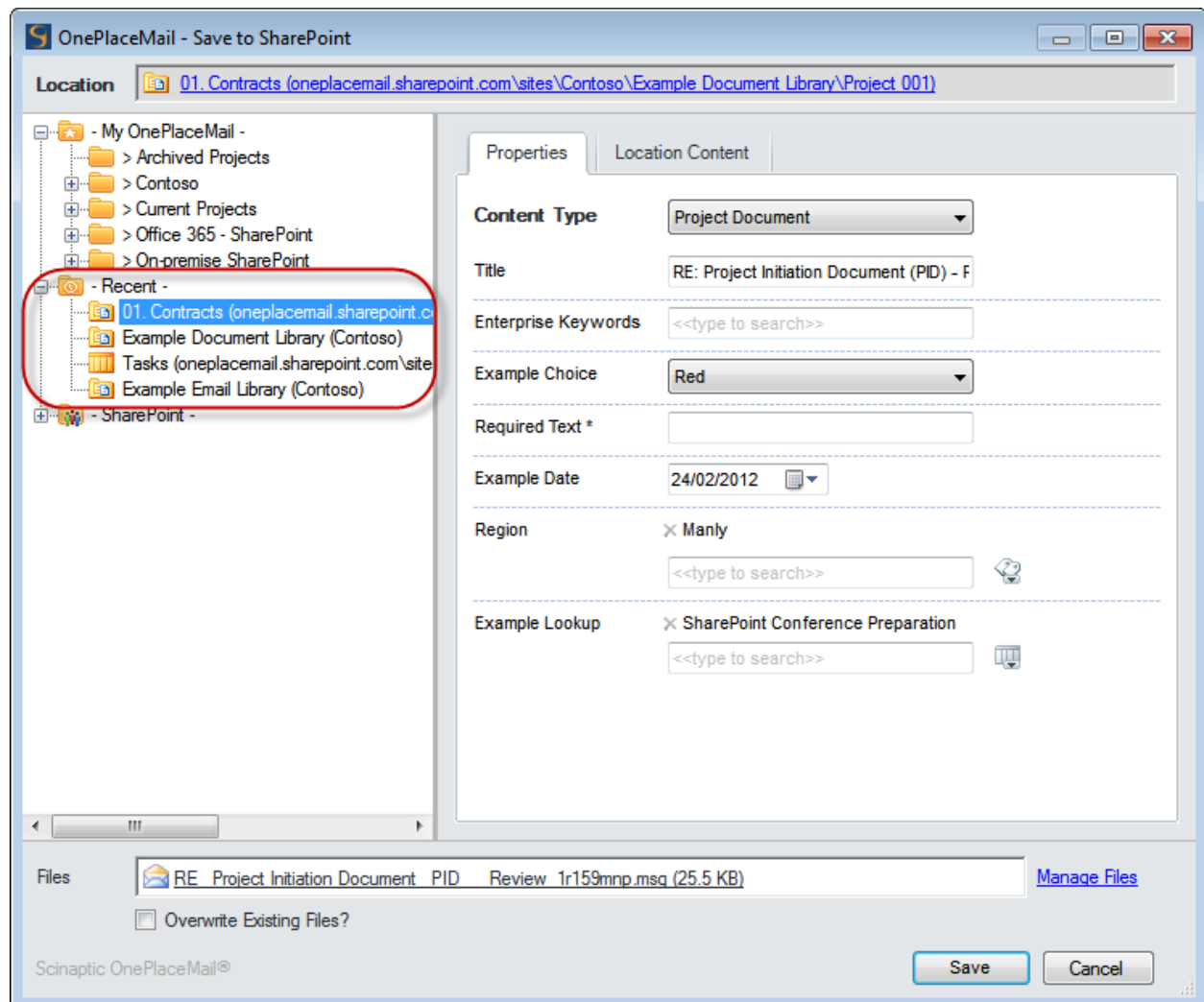
You have the ability to add a new SharePoint connection using the link provided under the ' – SharePoint –' folder in the tree navigation.



Add SharePoint Connection

1.3.5 Recent Locations

The Recent Locations area allows you to select a SharePoint Library, Folder or Document Set to save content.



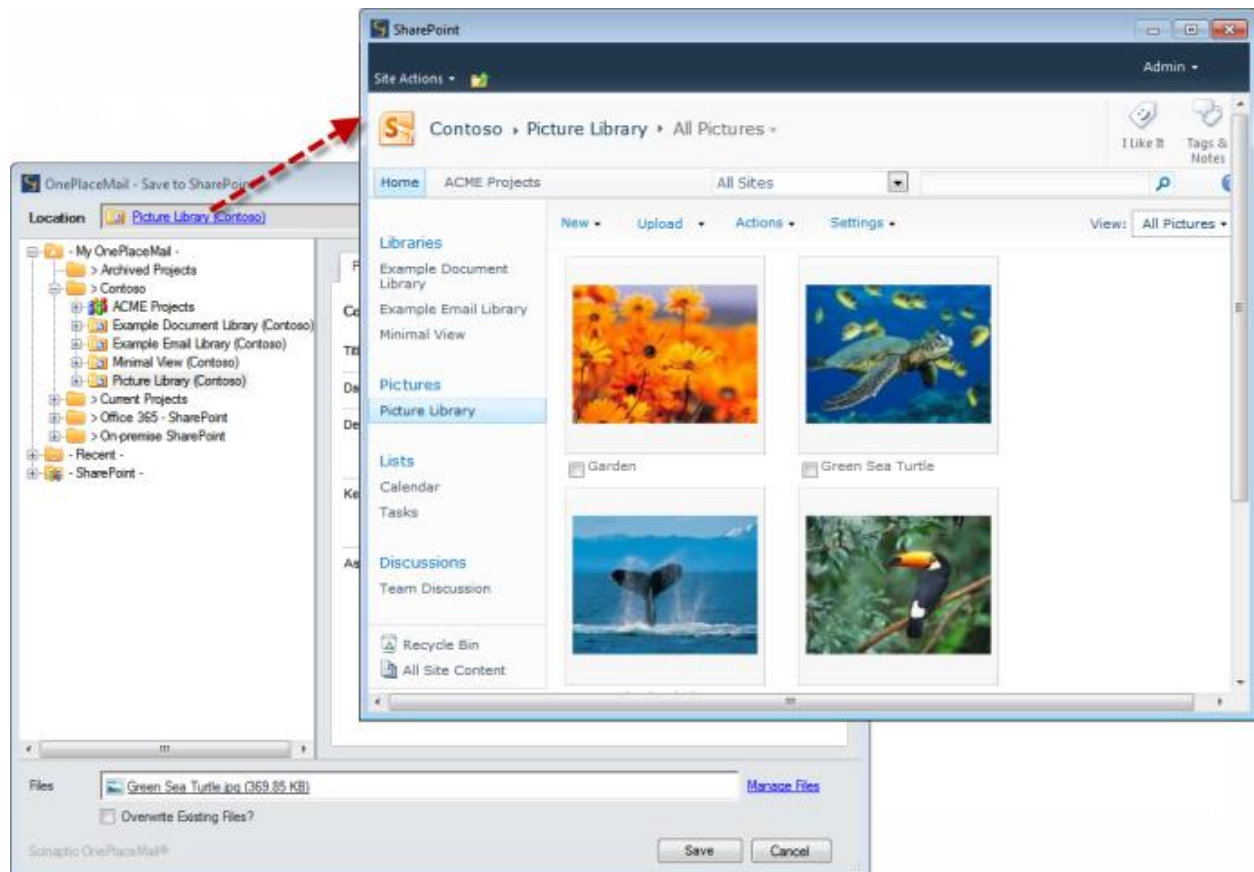
Save to a recent location

1.3.6 View location in SharePoint

The Location provides a link to open a web browser to the current location.

This is useful if you would like to perform actions in SharePoint such as creating folders or modifying content prior to saving new items into SharePoint.

New folders created via the popup window will be shown immediately within the Save to SharePoint window when the browser is closed.



View SharePoint location content from Save to SharePoint window

1.3.7 Properties

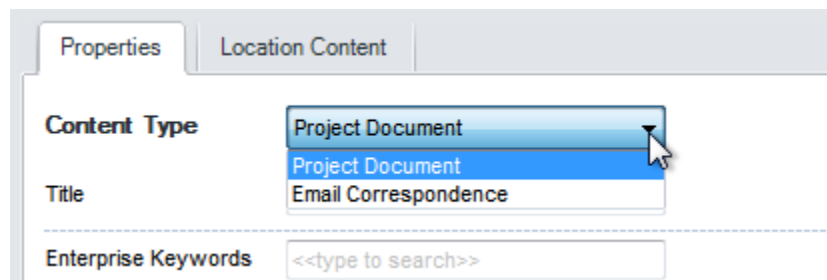
The Properties area allows the efficient completion of SharePoint metadata.

The screenshot shows the 'Properties' dialog box for a SharePoint library. The 'Properties' tab is selected, and the 'Content Type' is set to 'Project Document'. The 'Title' is set to '[Auto Set]'. The 'Enterprise Keywords' field is empty. The 'Example Choice' is set to 'Red'. The 'Required Text' field is empty. The 'Example Date' is set to '22/02/2012'. The 'Region' is set to 'Manly'. The 'Example Lookup' field shows a list of suggestions: 'Bondi [Region:Australia:NSW]', 'Bondi Beach [Region:Australia:NSW]', and 'Bowen [Region:Australia:NSW]'. A red arrow points from the 'Properties' tab in the smaller dialog to the 'Properties' tab in the larger dialog.

Classify content: Complete SharePoint Library/List metadata (Columns)

Content Type

The Properties (columns) change depending on content type selected (drop-down). Any column or content type changes made in SharePoint will be instantly available in the Save to SharePoint Window.



Select Content Type

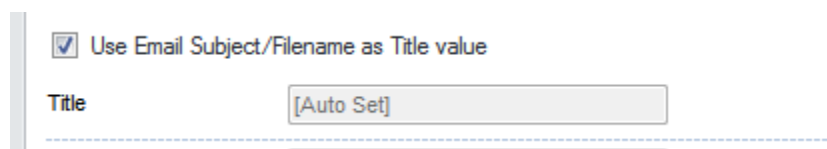
Properties

In the Properties area, you can see the list of columns defined in SharePoint for the selected location. The columns in **Properties** change according to the selected **Content Type**. Any column or content type changes made in SharePoint will be made available in the Save to SharePoint Window.

The column metadata, along with the automatically captured email attributes are saved with the new items created in SharePoint. This information can be used within SharePoint to create views and is also indexed and used when searching for content in SharePoint.

Automatically set email subject or filename as Title column value


OnePlaceMail by default sets the Title Column value to the email subject or filename (in the case of attachments). If desired, you can deselect the **Use Email Subject/Filename as Title Value** box to enter your own Title value.



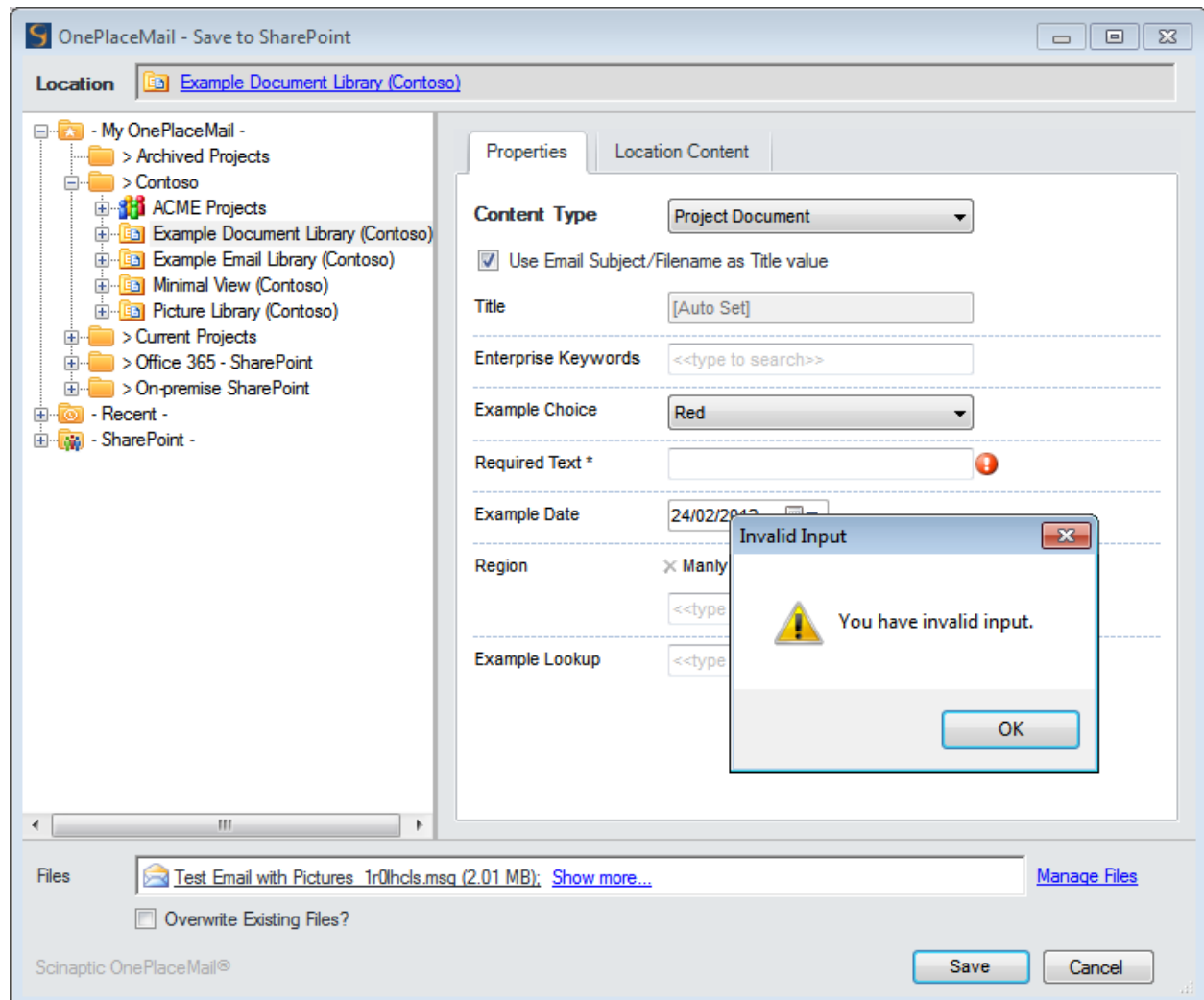
Set Title of SharePoint Items to Email Subject or Filename

Required Columns

OnePlaceMail prevents items being uploaded to SharePoint where Required Columns have not been completed.

Required Information is denoted by an asterisk. A warning is also provided with a red exclamation mark  beside the field if no information has been entered and an **Invalid Input** window will appear.

Required Columns are indicated in the Save to SharePoint window with an Asterisk (*).

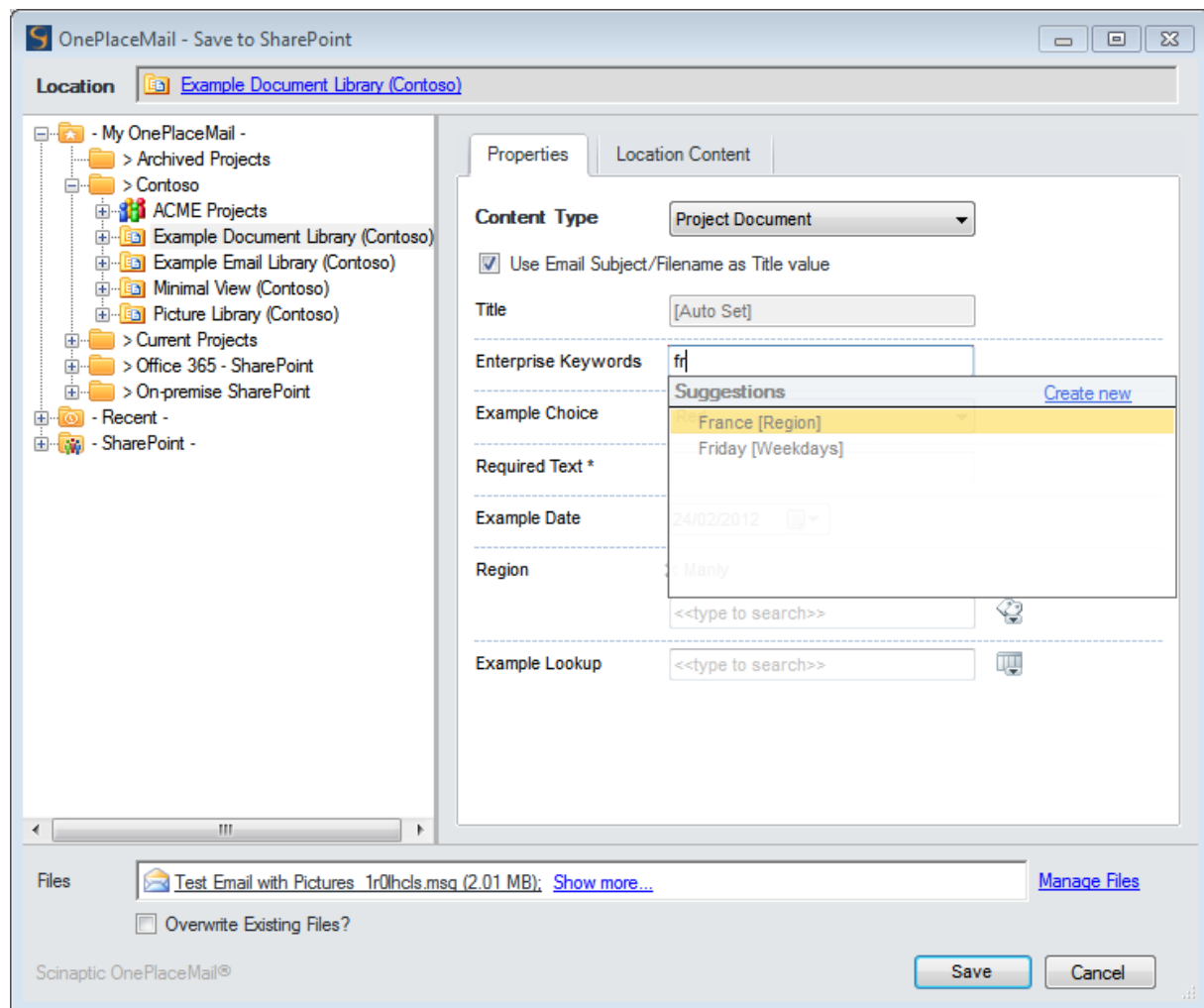


Validate content prior to saving into SharePoint

Tip: OnePlaceMail also fully supports SharePoint 2010 list level validation (OnePlaceMail Enterprise Edition only)

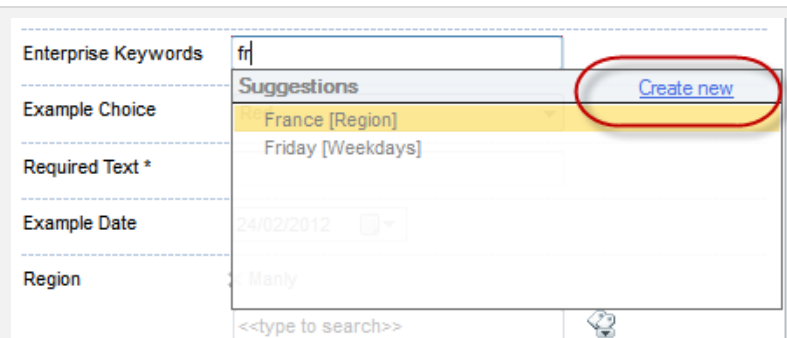
Enterprise Keywords

Enterprise Keywords and Managed Metadata columns can be completed using the full type-ahead capability into the terms/taxonomy store of SharePoint.



Enterprise Keywords – Type-ahead capability

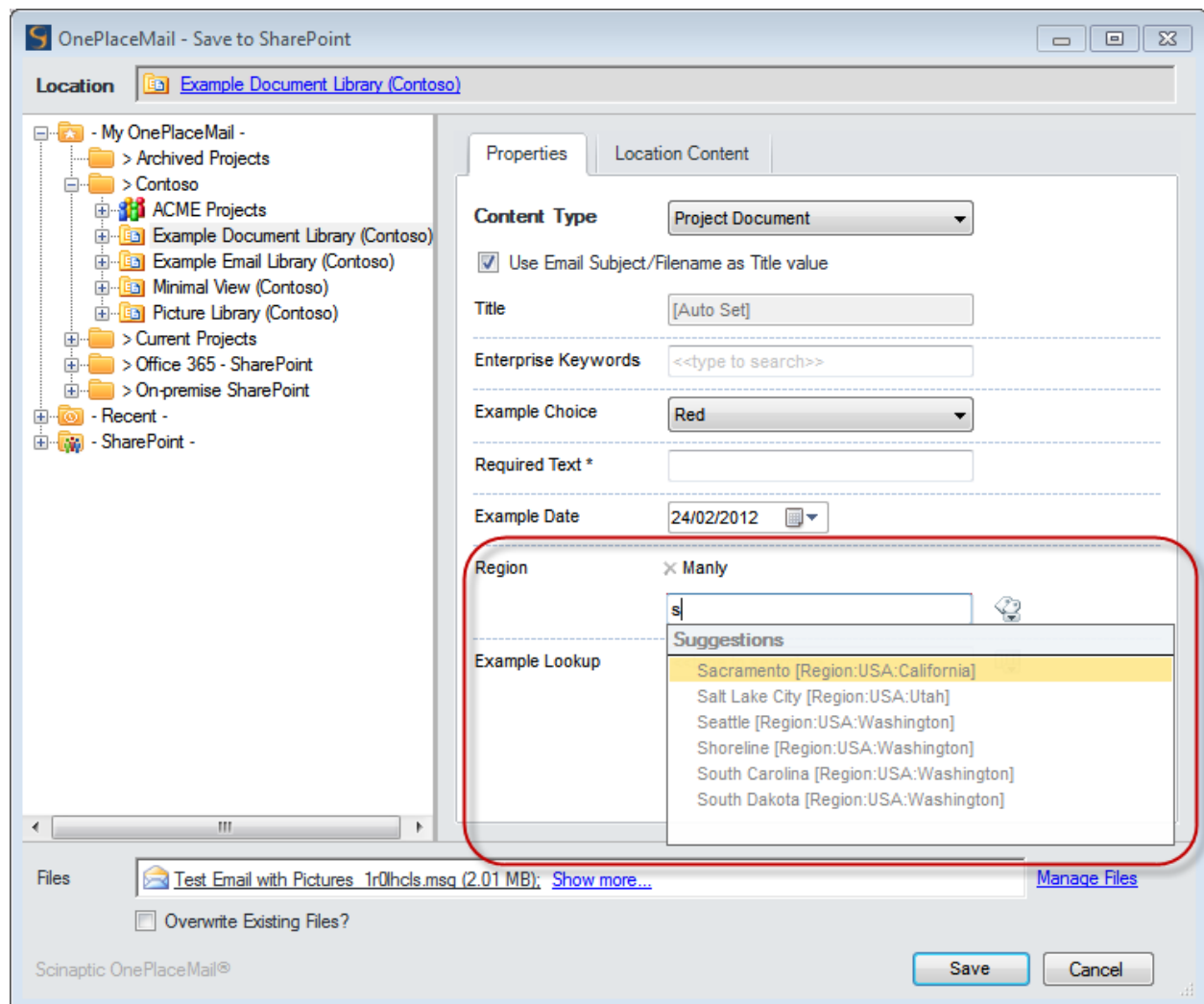
If the Term Store has been configured as an open terms store, you will have the ability to create new Terms in the event the Term you are looking for is not available.



Create new Keyword Terms

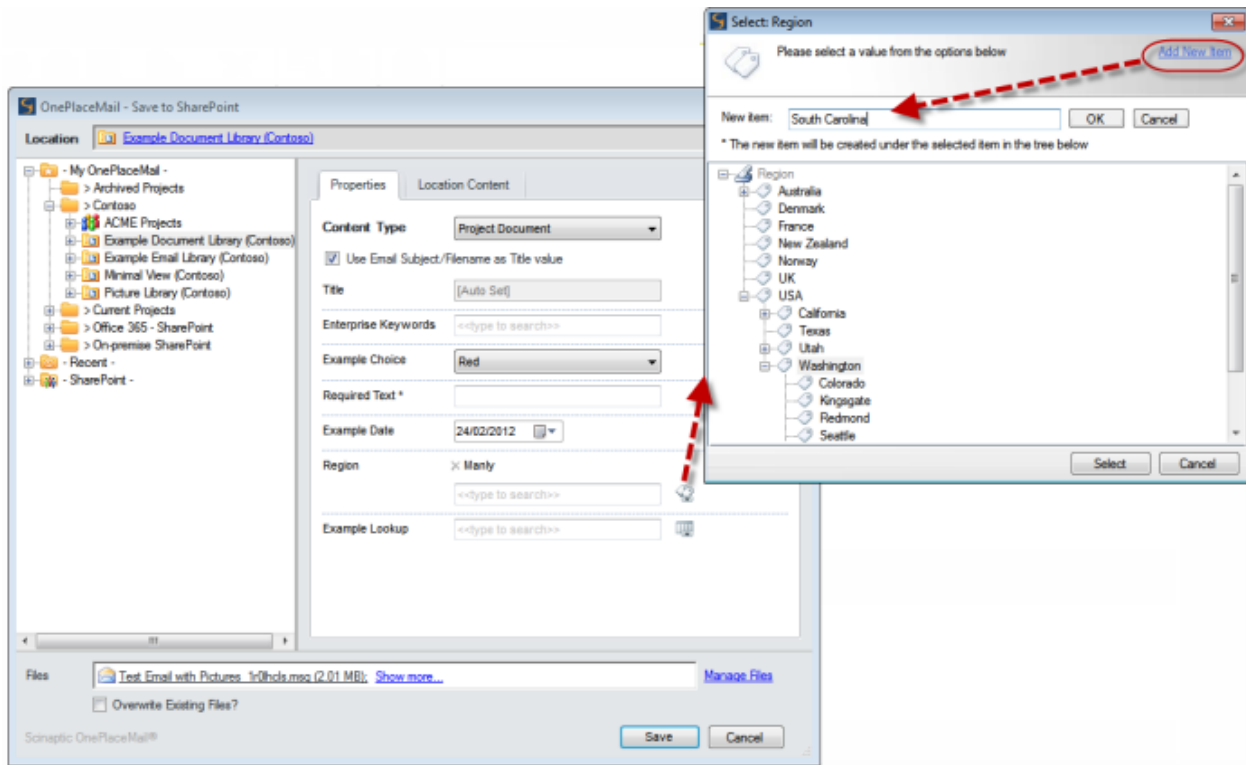
Managed Metadata

Managed Metadata columns also provide an efficient type-ahead capability for locating Terms.



Managed Metadata – full type-ahead

Alternatively, you can browse the Term Store or Create a **New Item** if the Term Store and Column has been configured to allow this capability.

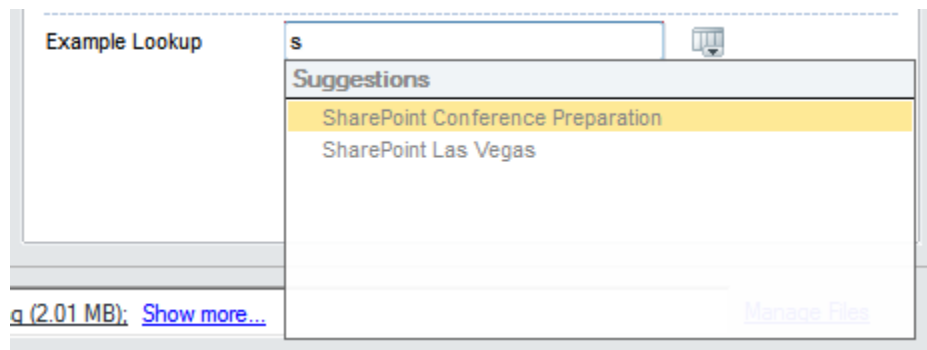


Managed Metadata – Create New Item

Tip: OnePlaceMail supports Multilingual terms stores with full type-ahead capabilities

Lookup List

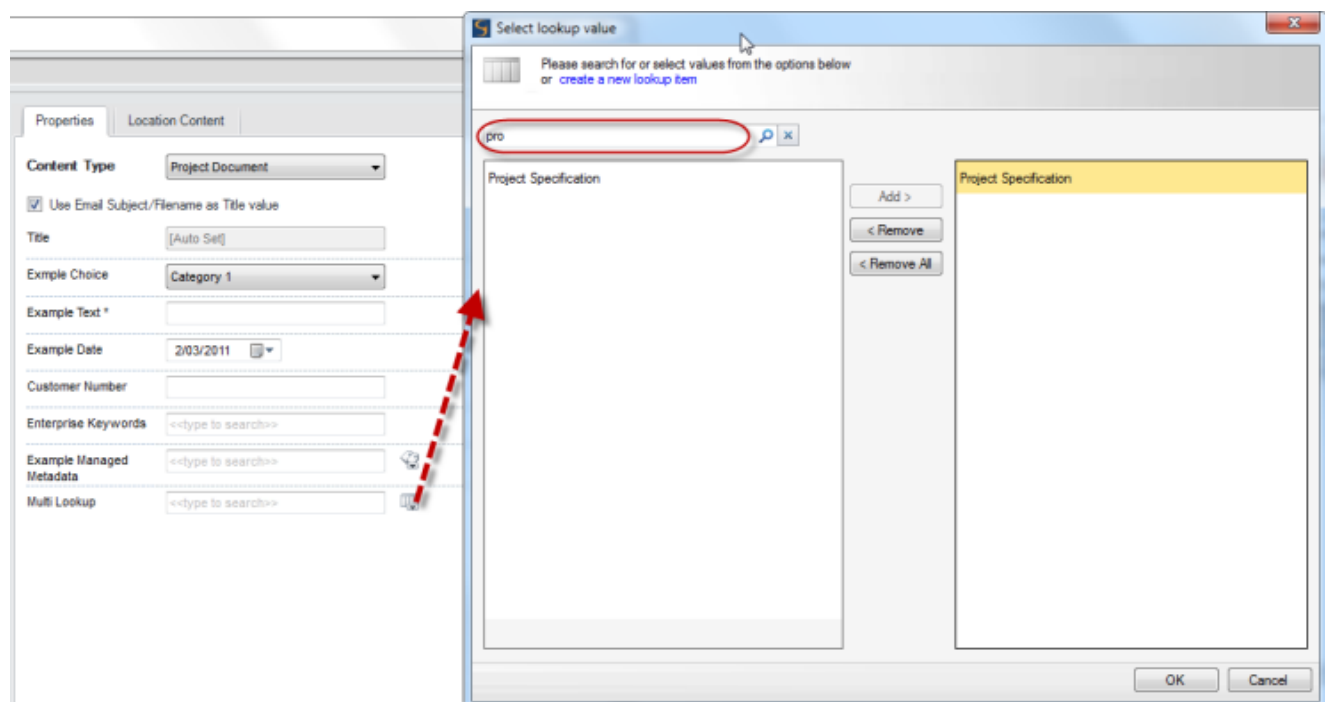
OnePlaceMail provides a full type-ahead capability for SharePoint Lookup columns (similar to Enterprise Keywords). This can significantly streamline the process for completing metadata.



SharePoint Lookup List – Using full-type ahead capabilities

Select a List Item

In addition to the type-ahead capability, you can also use the selector icon to launch the select lookup window. The window allows for both the selection and type-ahead capability for locating list items. The screenshot shown below is for a multi-value lookup column.

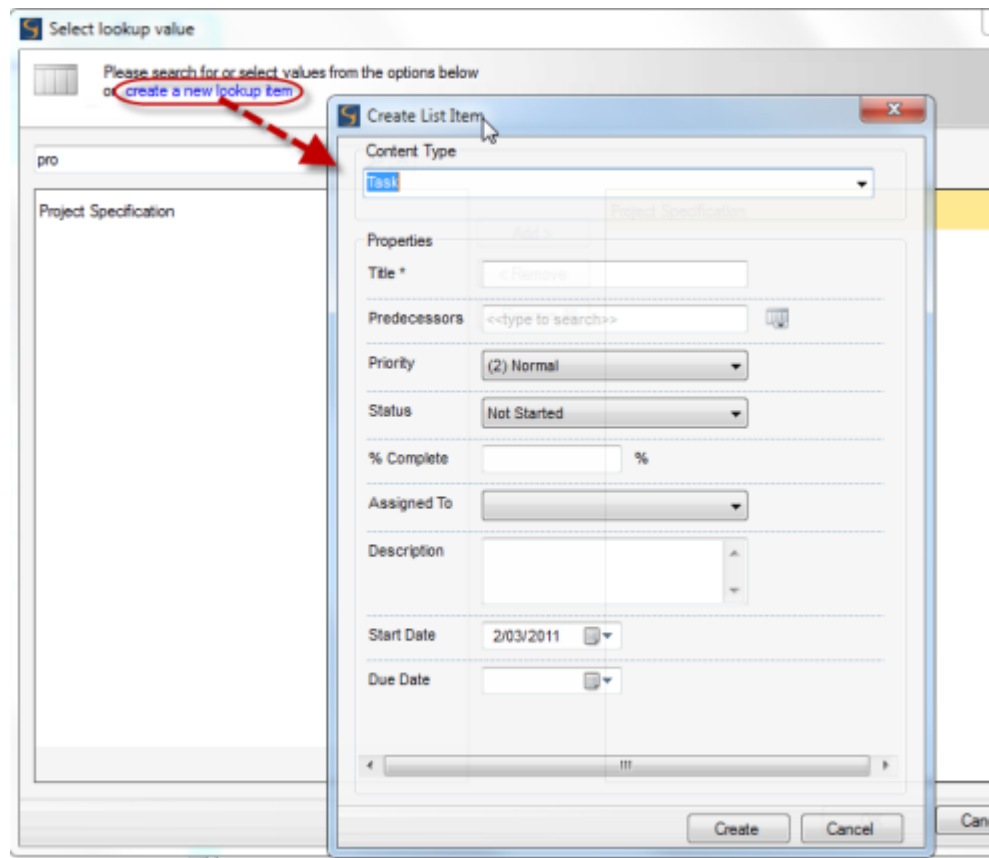


Lookup List (multiple select) – with type-ahead filter

Create a new List Item

OnePlaceMail provides the facility to create new list items (if you have the security access to create new items) during the save to SharePoint process.

This streamlines the save to SharePoint process in the case of an item not being available in a list.



Lookup List – Create new Item



The Lookup Column could retrieve values from a Task List, Issues List, Events, Announcements, Custom List, etc... The new list item will be instantly available in the list without the need to interrupt the upload process.

External Data Column (Business Connectivity Services)

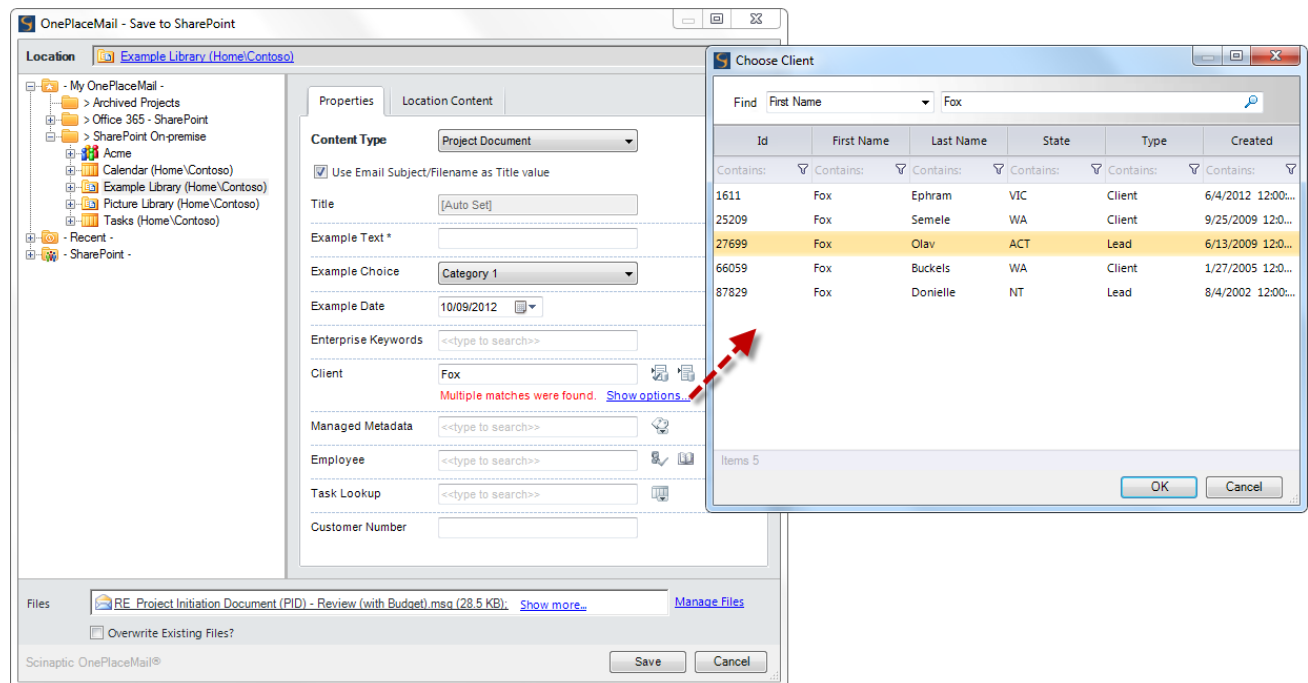
OnePlaceMail works with your existing SharePoint 2010 Business Connectivity Services (BCS) configuration. There is no additional configuration necessary. This screencast showing '[How to use Business Connectivity Services from within Microsoft Outlook](#)' demonstrates OnePlaceMail using an External Data Column.

To select an item from your External System using the External Data Column, you can either resolve the value entered or perform a search.

If the value entered is resolved and shown to be unique, no further selection is necessary. However, if multiple matches are located you will be presented with a window where you can select a value from the multiple matches. You also have the ability to sort the list and/or filter the content further using the Column filtering provided.

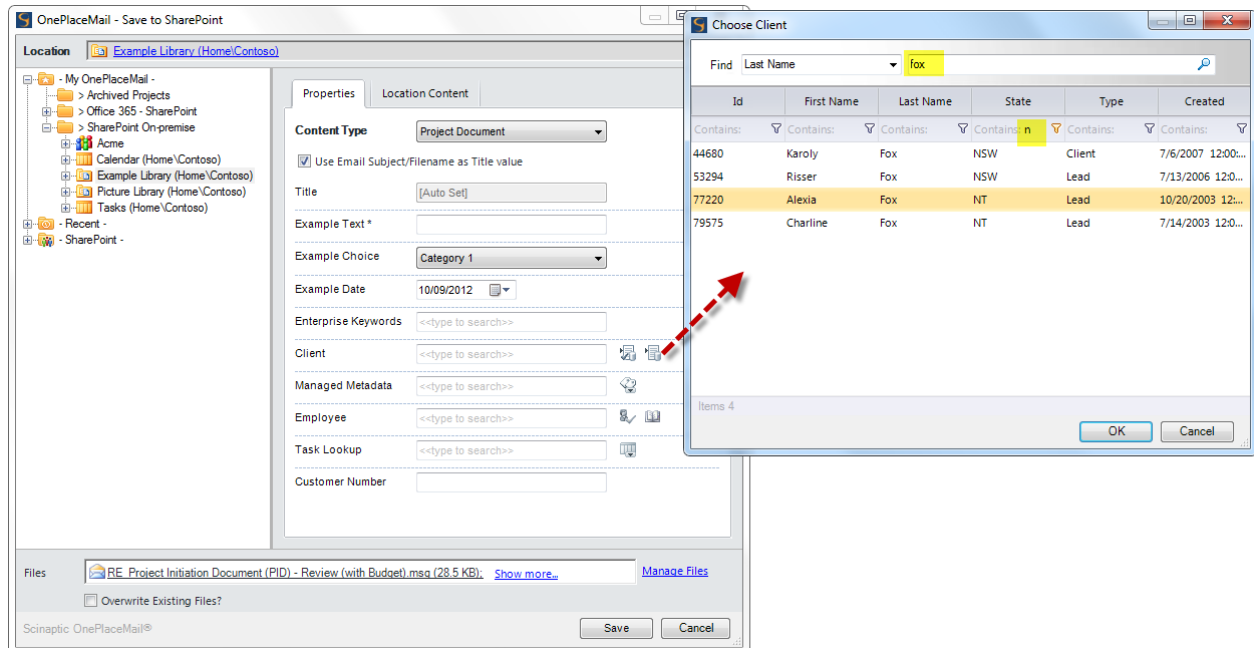
Client  
Multiple matches were found. [Show options...](#)

External Data Column – Resolve with Multiple Item Matches



External Data Column – Select from multiple matches

The option to perform a Search across your external system is provided by clicking on the 2nd icon. This will present the External Data Column Picker window where you have the ability to search for the appropriate entry. In a similar manner to the resolve (where multiple entries exist), OnePlaceMail provides the ability to sort and further refine the search results.

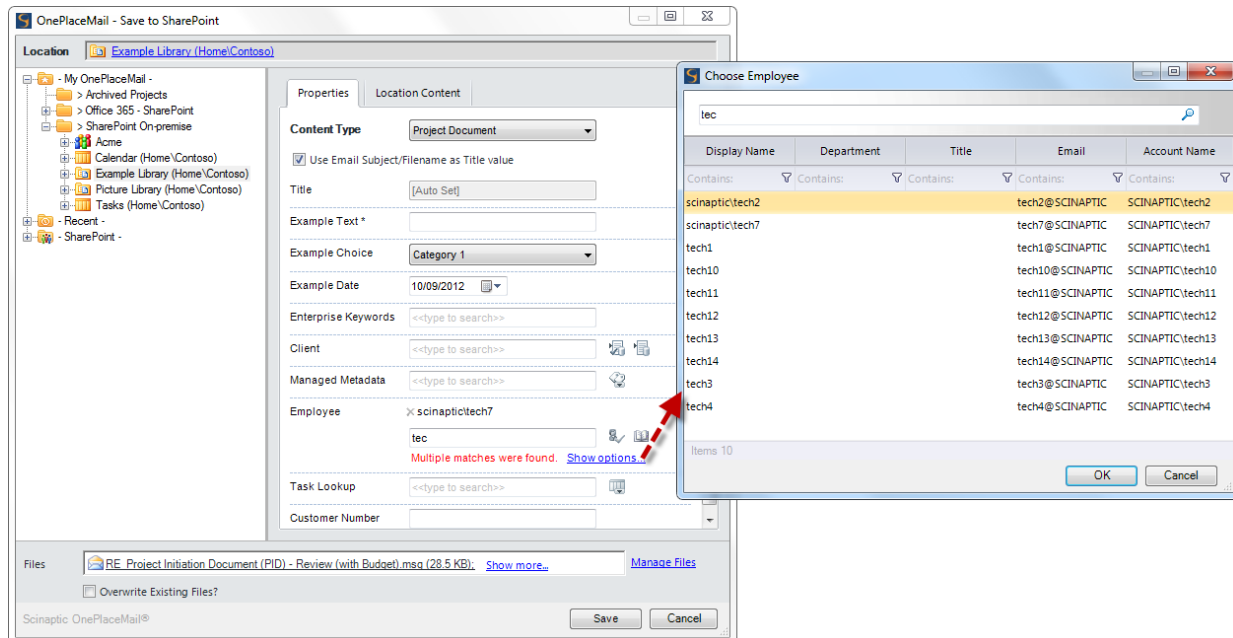


External Data Column - Search and Filter

People and Groups Column

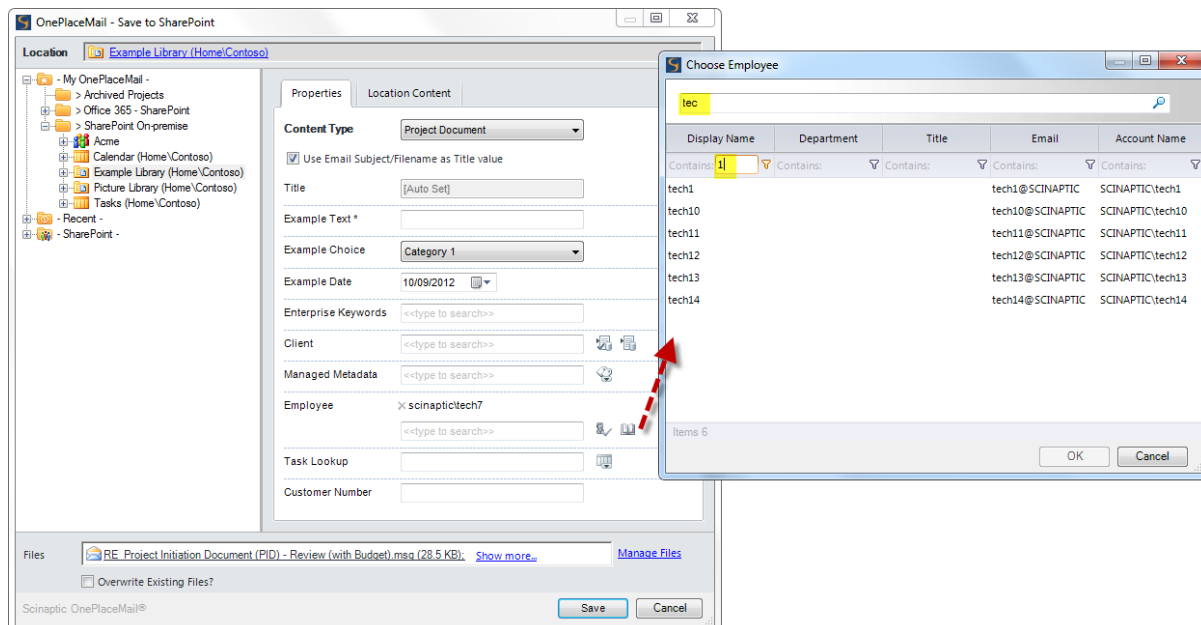
The People and Groups SharePoint Column provide the ability to both Resolve and Search for entries.

To resolve an entry, simply type the name/group and select the Resolve button. Alternatively, you can hit Enter. If you find a unique match, the Person/Group will be selected.



People and Groups – Resolve

Alternatively, you can search for People and Groups using the People/Groups picker provided. This will allow you to search, sort and further refine your results to select an entry.

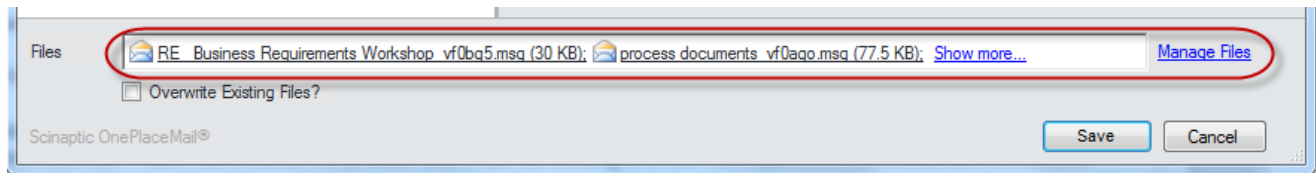


People and Groups – Search, Sort and Refine

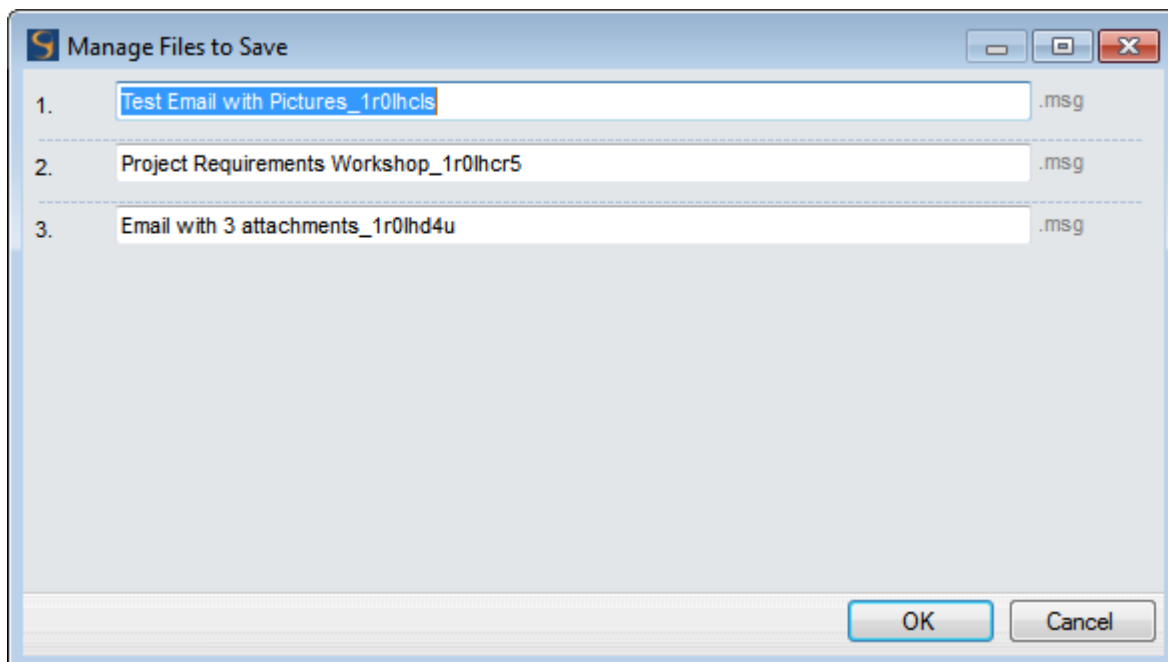
1.3.8 Files

Manage Files

Prior to saving files to SharePoint, you have the option to rename any files within the Manage Files area. By default, OnePlaceMail provides duplicate checking of emails by uniquely identifying emails that have been sent to multiple recipients.



The **Manage Files** provides a list of the files you have selected for saving to SharePoint. This is especially useful if you are saving several items. While you are completing additional filing information, you might want to remind yourself which files you are currently saving.



Manage Files – option to rename

OnePlaceMail validates a filename has been entered. If the filename field is empty and you click the **Save** button, OnePlaceMail will not allow the upload. You will see a red exclamation mark icon at the respective filename field and the **Invalid Input** window will appear. To resolve the error, simply click **OK** and type in a filename for the file that is marked with the exclamation mark.

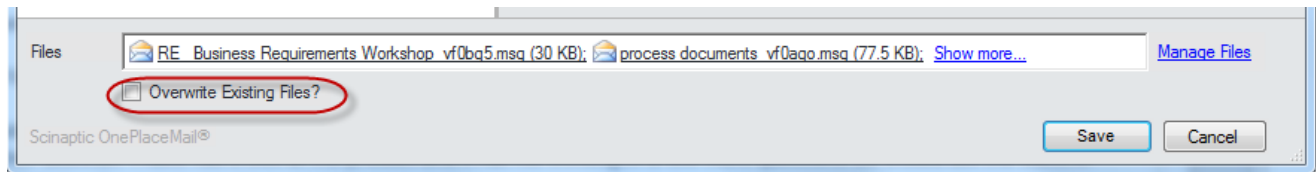
OnePlaceMail provides a number of file naming conventions to meet different business requirements (see Administrator Guide). The default naming convention is configured to perform email duplicate checking. Therefore, OnePlaceMail will detect if the email has already been transferred to SharePoint. The filename format is:

Email Subject + a hash value of the following [Email Subject, Sender Name, Sent Date/Time]

Refer to the Administrator Guide for filename format options.

Overwrite Existing Files

OnePlaceMail will not override an existing file in a SharePoint location unless the 'Override Existing Files' option is checked in the Save to SharePoint window. If the option is checked, the original file will be overridden and managed according to the SharePoint configurations.



If versioning is enabled in the target document library and the option **Overwrite Existing Files** is selected, the file will be uploaded as a new version of the existing document with the same name.

If versioning is not enabled and this option is selected, the file will be uploaded, replacing the one of the same name in the target document library.

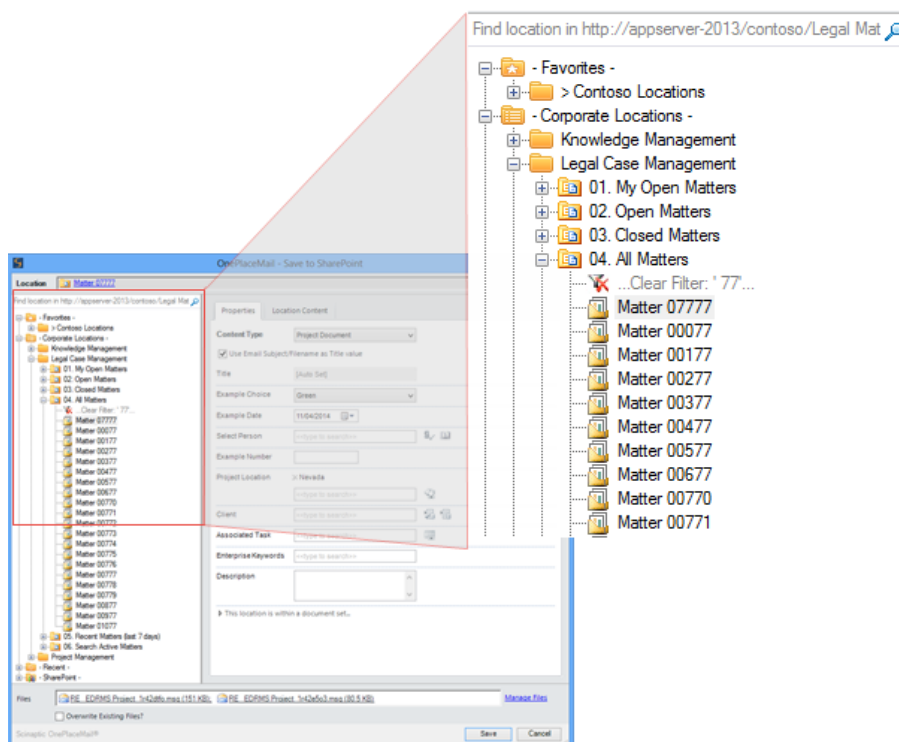
If a document library has the versioning setting **Require documents to be checked out before they can be edited?** you will be unable to overwrite the existing file. If the file is already checked-out by someone else, you will also be unable to overwrite it.

1.3.9 Navigation Tree - Filter locations with type-ahead

The navigation tree provides the ability for type-ahead to help make finding and selecting a location more efficient.

This navigation tree is used consistently across the Save to SharePoint window within Outlook, Windows Explorer, and Office applications, and also within the Insert from SharePoint, Open from SharePoint and Outlook style experience when browsing SharePoint from Outlook

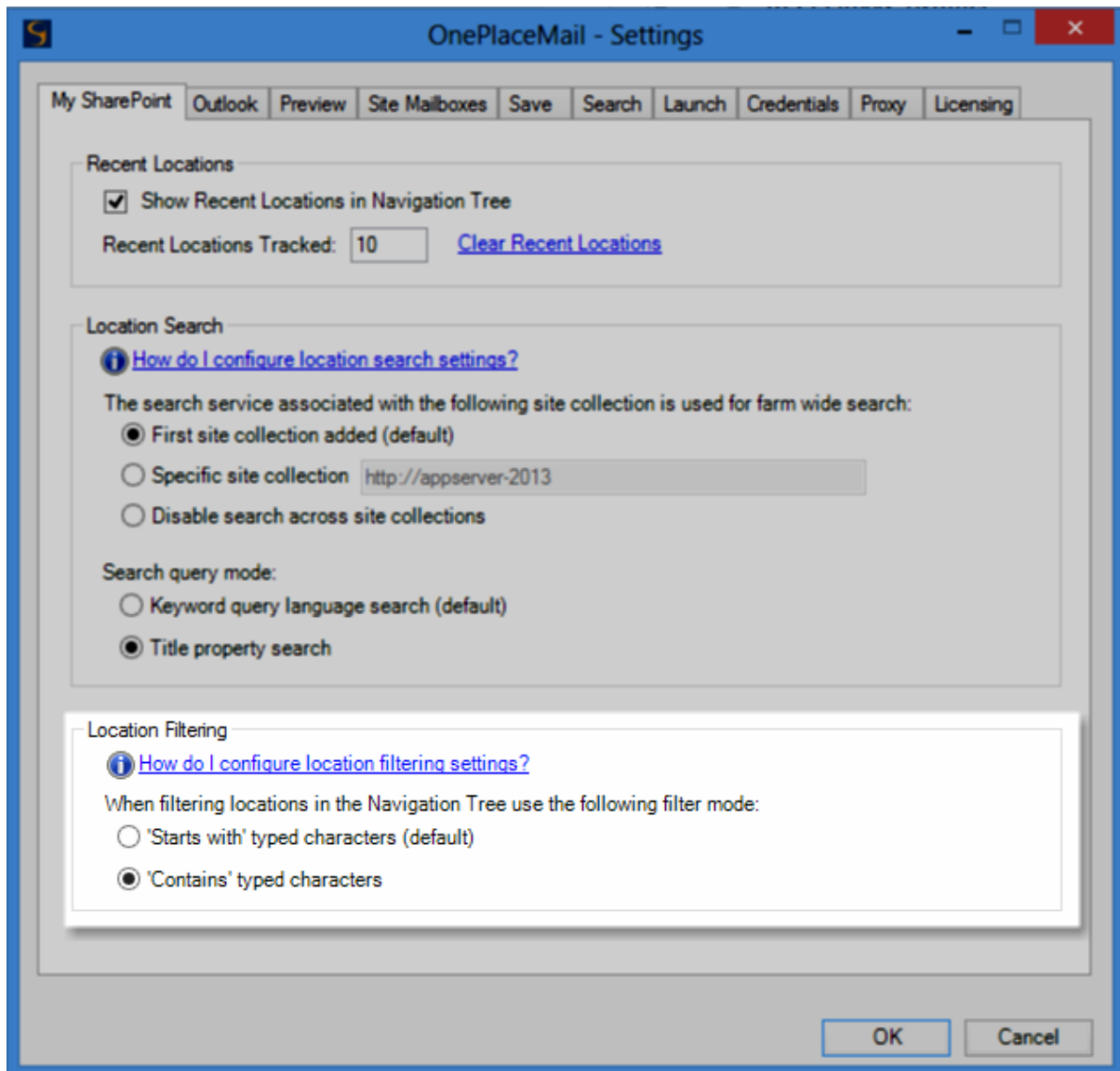
When you select a node in the navigation tree, such as a document library containing document sets or folders, there is the ability to start typing the name of the document set/folder for which you would like to select. The list of document sets/folder are filtered as each character is typed. This provides an efficient method for selecting a specific location.



Type-ahead filtering for the select tree node – example: 77 (using 'Contains...' option)

The same type-ahead filtering is available at every node in the tree. For example, when selecting a Site, List or Folder.

By default the filter works using the logic of 'Starts with'. This can be modified to be a 'Contains...' within the OnePlaceMail Settings Window or set centrally as a configuration option for all users.



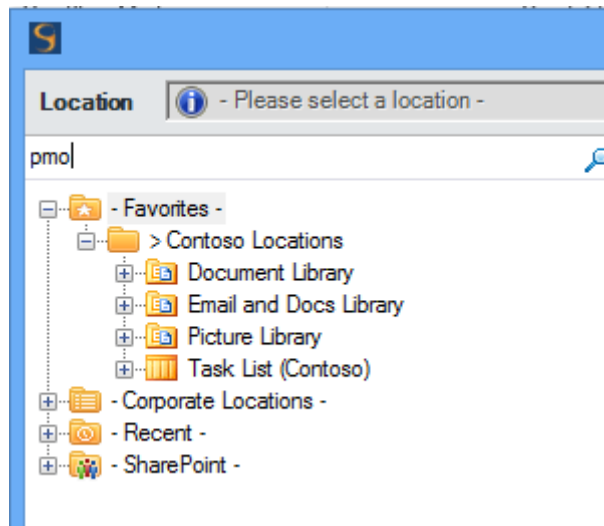
Settings for Location Filtering

1.3.10 Navigation Tree - Search locations

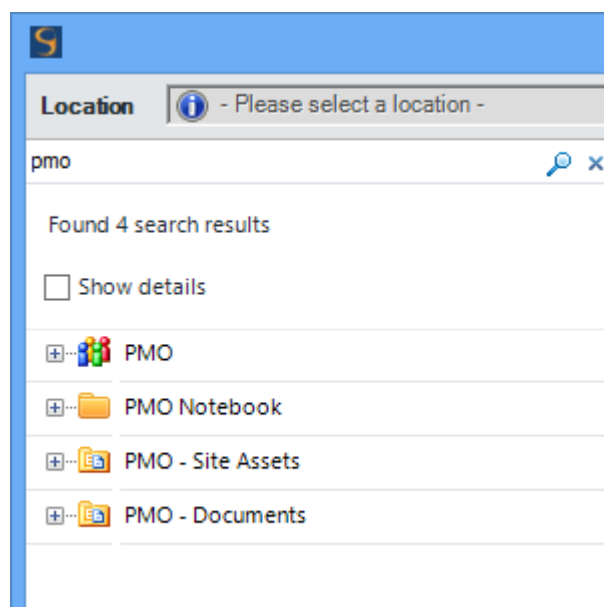
The navigation tree search uses the powerful enterprise search and indexing capabilities of SharePoint, allowing the user to efficiently find a location within SharePoint. For example, you can search for a site, library, document set and/or folder.

The navigation tree is available across a number of areas within the OnePlaceMail solution. Therefore, searching for a location is consistent and always available.

If you have a node in the navigation tree selected, the search will be scoped to the selected node and any node at multiple levels below the currently select node. If no node is selected within the navigation tree, the search can be configured to search across the entire SharePoint farm.



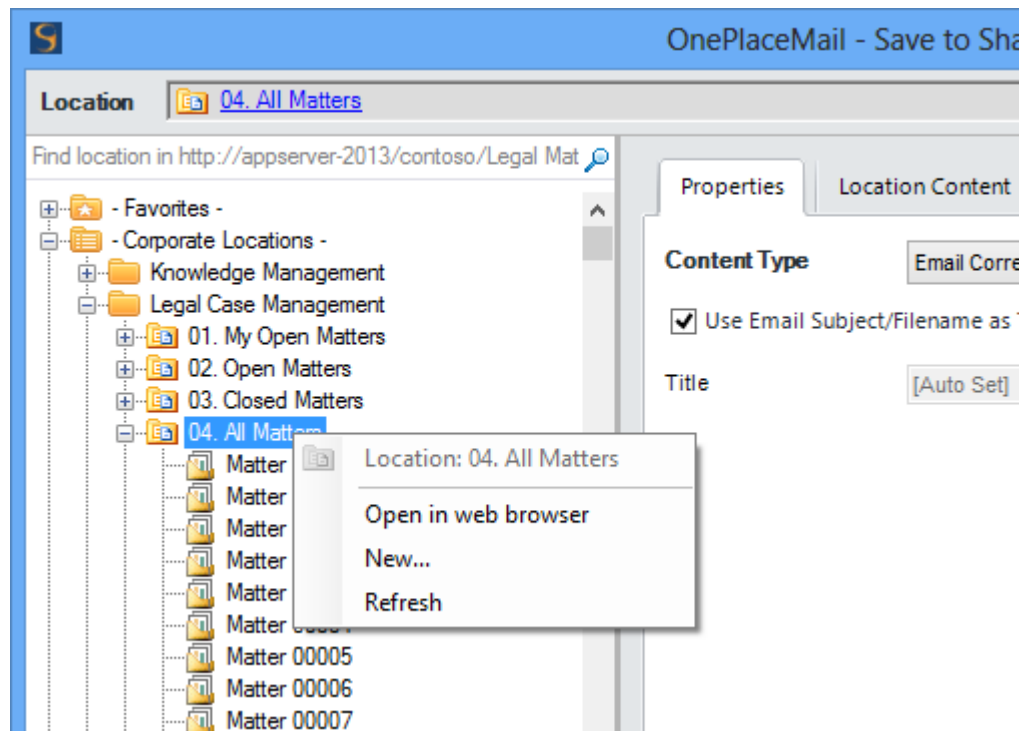
Type a search query



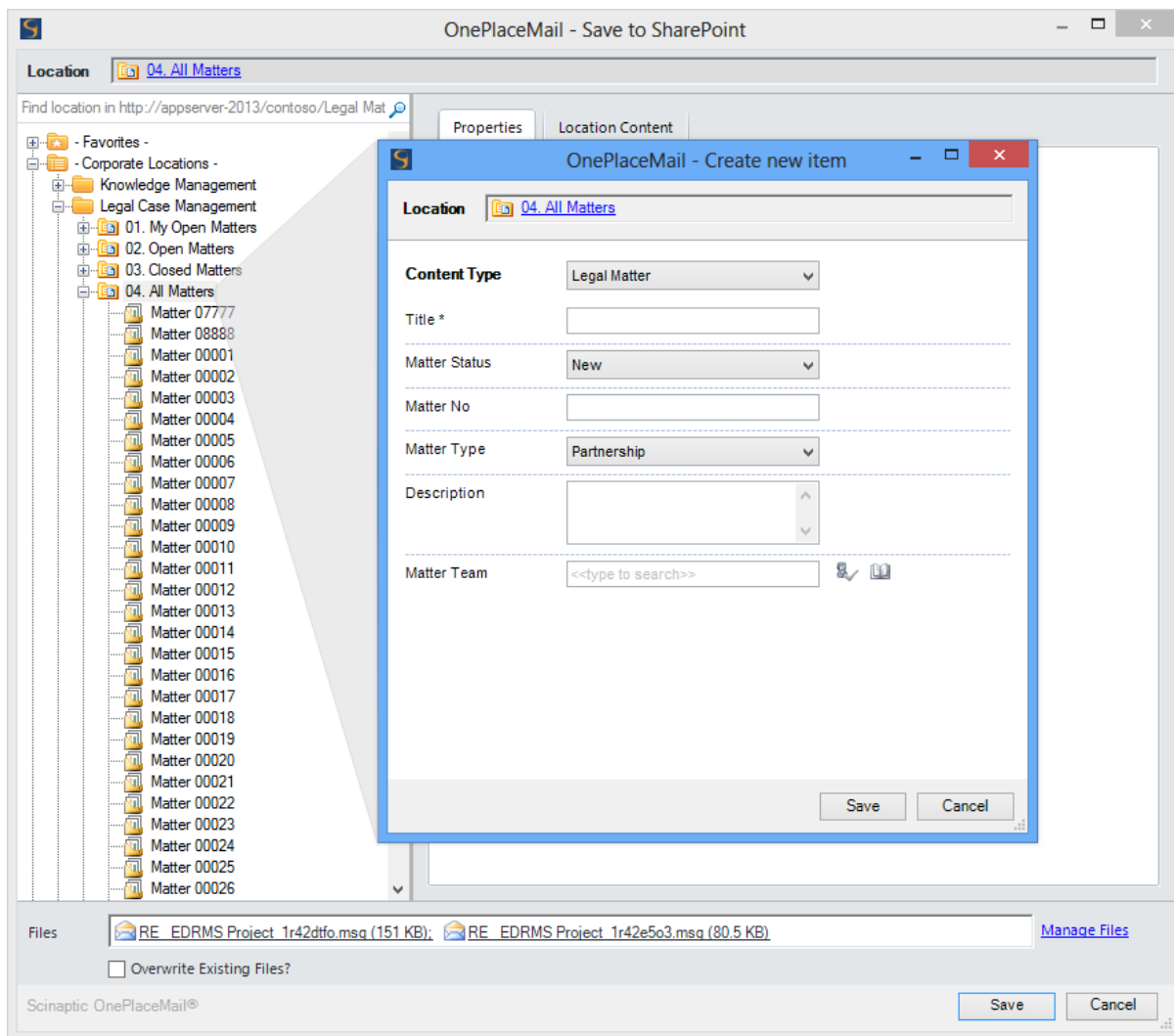
View/select a location from the search results

1.3.11 Create new folders/document sets from within Outlook

From within the navigation tree, there is the ability to create new folders and document sets.



Right-Click – New...



Create a new Document Set / Folder

Permissions to control who can create new document sets and folders is based on the SharePoint security permissions and settings.

1.3.12 Document sets enhancements

All columns within a document set which have been configured to automatically synchronize down/stamped on newly created documents are suppressed from the Save to SharePoint user interface. This removes confusion when completing metadata upon saving content into a document set.

Matter Management ▸ Matter 05550



Matter 05550

Example description for the selected matter

Title	Matter 05550
Matter No	05550
Matter Type	Corporate
Matter Team	Demo User
Matter Status	New

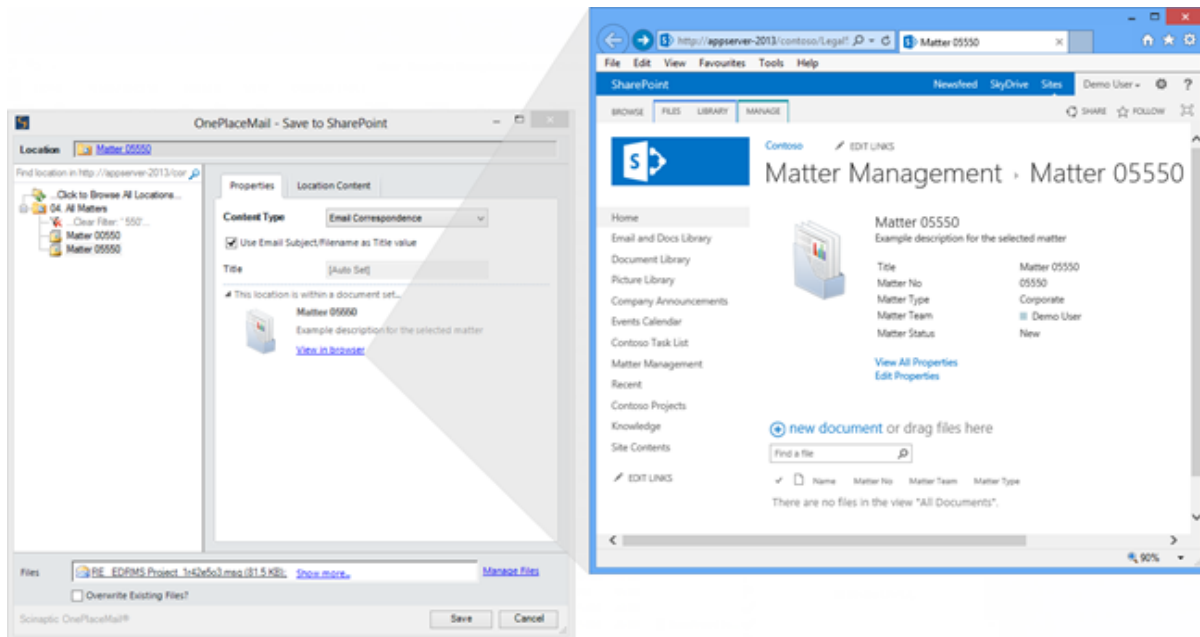
[View All Properties](#)

[Edit Properties](#)

SharePoint document set – with 2 columns being synchronized down/stamped on new items

Save to SharePoint Window – with document set columns suppressed

A new section on the Save to SharePoint window is provided, enabling the end user to view a description of the document set and access the full properties of the document set within the web browser.



Access document set information and content

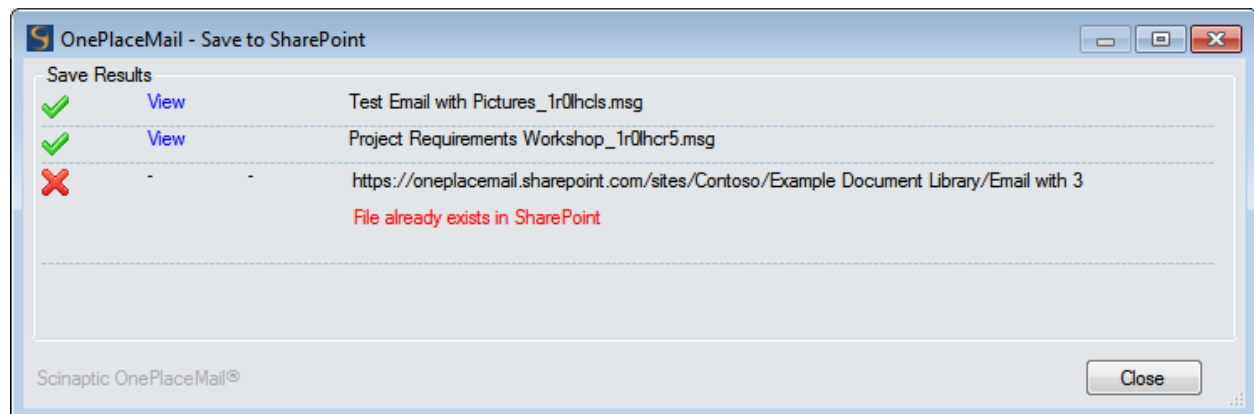
1.4 Step 3: (Optional) Display Upload Results Window

The Save Results Window presents a summary of the save status for each email/file sent to SharePoint. The potential save status results are:

Successful

Successful & Checked-Out

Unsuccessful



Save Results (optional to display)

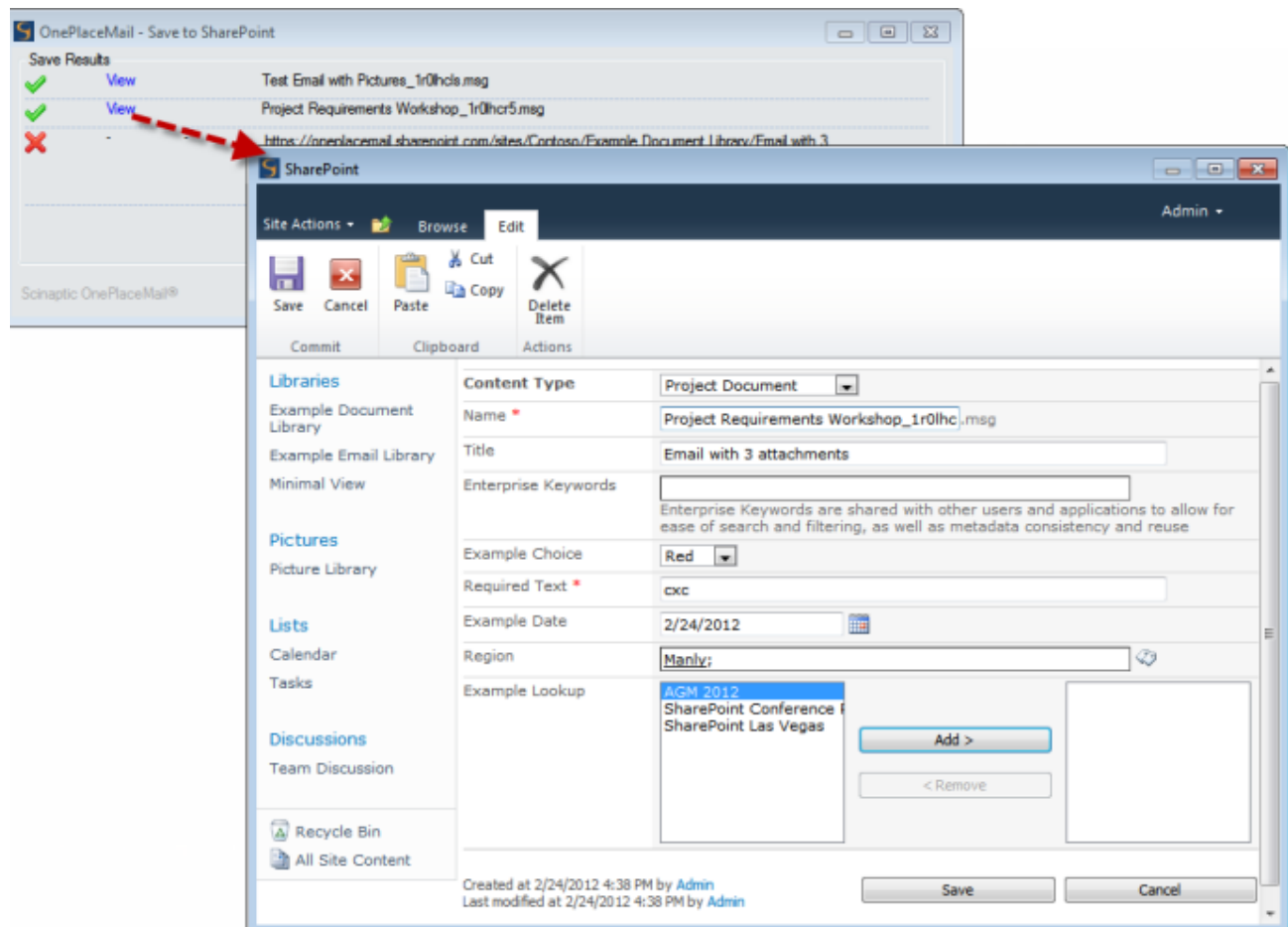
The Save Results window can be suppressed from displaying on a location by location basis in the Folder Settings area of the Manage My OnePlaceMail Folder Window. If the save Results Window is suppressed, the window will still appear by exception in the case of an unsuccessful save attempt for an email/file.

The Save Results window also provides the ability to View the successfully saved Item Properties.

View Items

The newly created SharePoint library/list items can be viewed and if required, edited by clicking on the link in the Save Results Window. This provides the opportunity to:

- Complete or modify any additional custom Column information directly in SharePoint as part of the save process
- Check-in any checked-out items
- Initiate workflow processes



View and edit SharePoint Item from Save Results

1.5 Result: SharePoint Content - Direct from Outlook

Email messages are saved to SharePoint in the .msg format. Therefore, the email message and email attachments integrity are retained. This format enables the email messages to be opened directly within Microsoft Outlook for performing further actions such as replying or forwarding the email.

Email attributes are automatically captured and promoted to SharePoint Columns. If email attachments are saved separately from the email, all the email attributes of the associated email are automatically captured and stored with the attachment in SharePoint.

1.5.1 SharePoint Library

OnePlaceMail is a live connection to SharePoint. Therefore, all files transferred to SharePoint via OnePlaceMail are immediately available in SharePoint. OnePlaceMail is not adding or removing any security, it is simply adhering to the security defined within SharePoint.

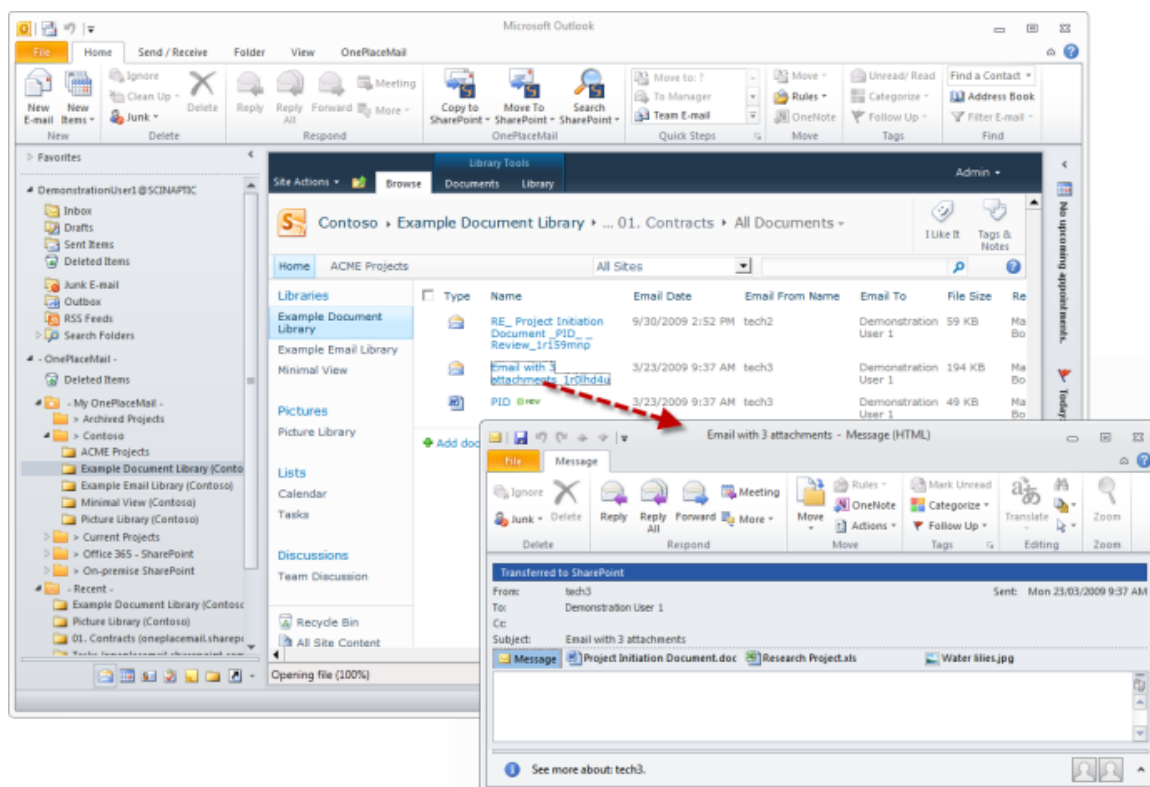
Emails can be opened from SharePoint into Outlook by selecting the yellow mail 'Type' icon (SharePoint 2007) or the filename link in SharePoint 2010.

1.5.2 Outlook Folder View - Standard

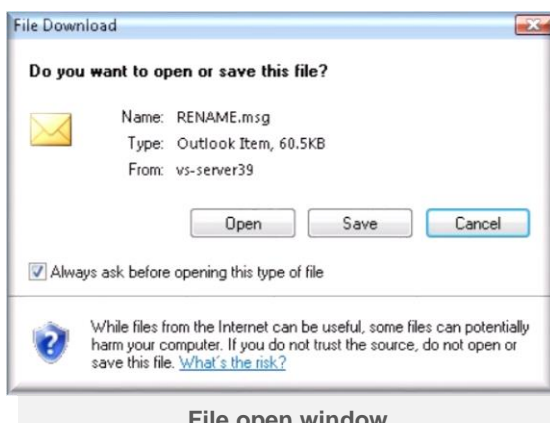
Content stored in SharePoint can be accessed directly from within Microsoft Outlook without the need to open a web browser. OnePlaceMail extends the power of Microsoft SharePoint to Microsoft Outlook. Enhancements or specific customizations made to SharePoint are made available directly in the Outlook interface, therefore promoting the adoption of SharePoint across the enterprise.

To view content in a SharePoint library/list, click on the appropriate folder within the My OnePlaceMail area as shown in the screenshot below. The default SharePoint view for the selected library/list (with the full SharePoint capabilities) will be available on the right hand pane of Outlook.

The email message is stored in SharePoint in the native .msg format. All email attributes are available as SharePoint columns and are available for creating views and for searching.



Open email message from SharePoint in Outlook



File open window

To view attachments and the email body click on the mail icon.

The **File Download Window** may appear. It allows you to open or save the selected email message.

Click **Open** to open and view the message and its attachments directly within Outlook.

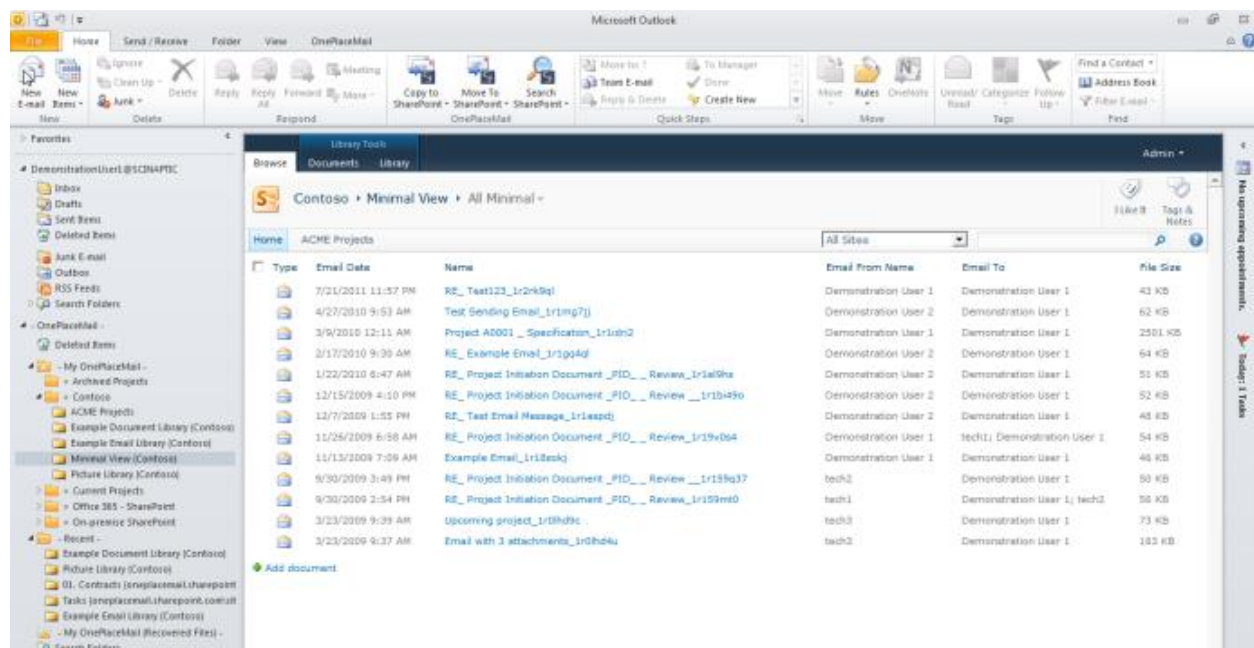
Tip: Deselect 'Always ask before opening this type of file'

1.5.3 Outlook Folder View - Minimal View

OnePlaceMail exposes the full power of SharePoint directly within Microsoft Outlook.

For some business requirements, you may only want to view the content of a library/list without the need for the top and left navigation provided in a standard SharePoint view. OnePlaceMail provides the concept of a 'Minimal View'. The minimal view can be configured by the Administrator using standard SharePoint tools (See Administrator Guide) to meet branding and functional requirements of the business.

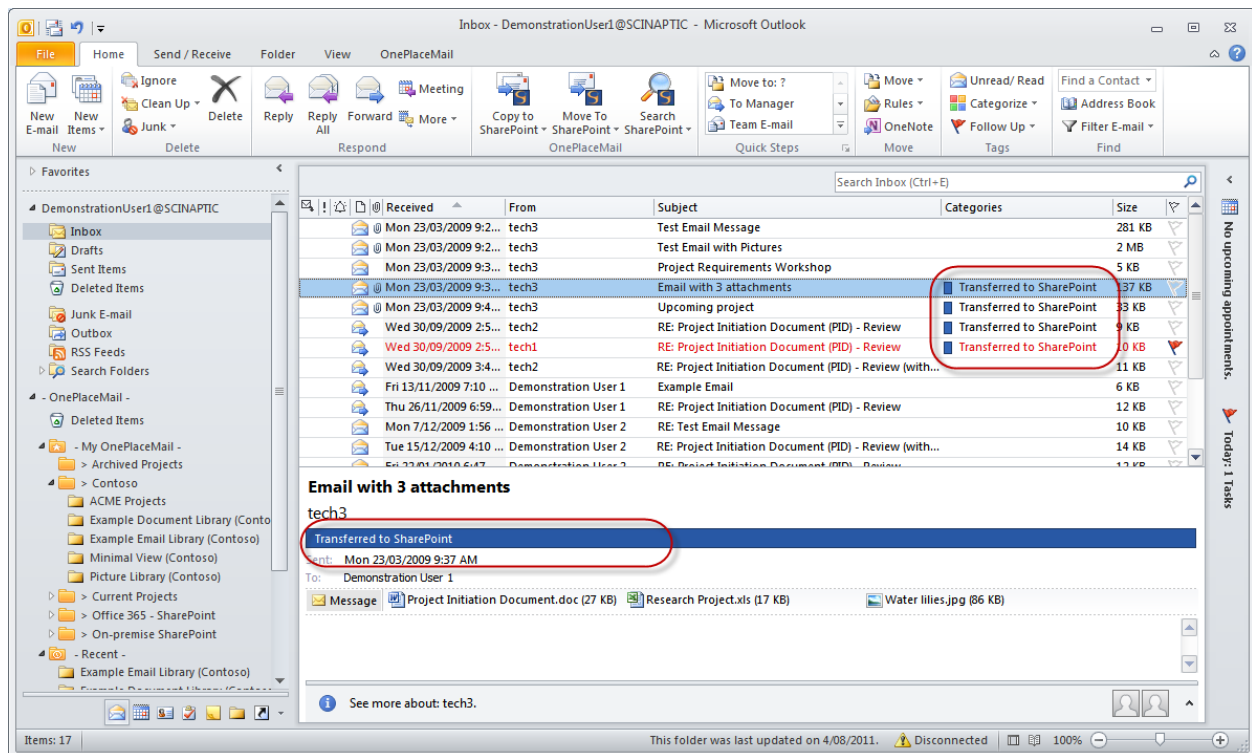
For example, the screenshot below has the left navigation removed from the SharePoint view when accessed via Outlook.



SharePoint within Outlook – Minimal view option (override SharePoint default view)

1.5.4 'Transferred to SharePoint' Category

If emails are copied to SharePoint instead of moved, the copied emails are flagged with an Outlook Category to indicate they have been successfully transferred to SharePoint. By default the Category name is 'Transferred to SharePoint' however this can be modified according to business requirements (See Administrator Guide).



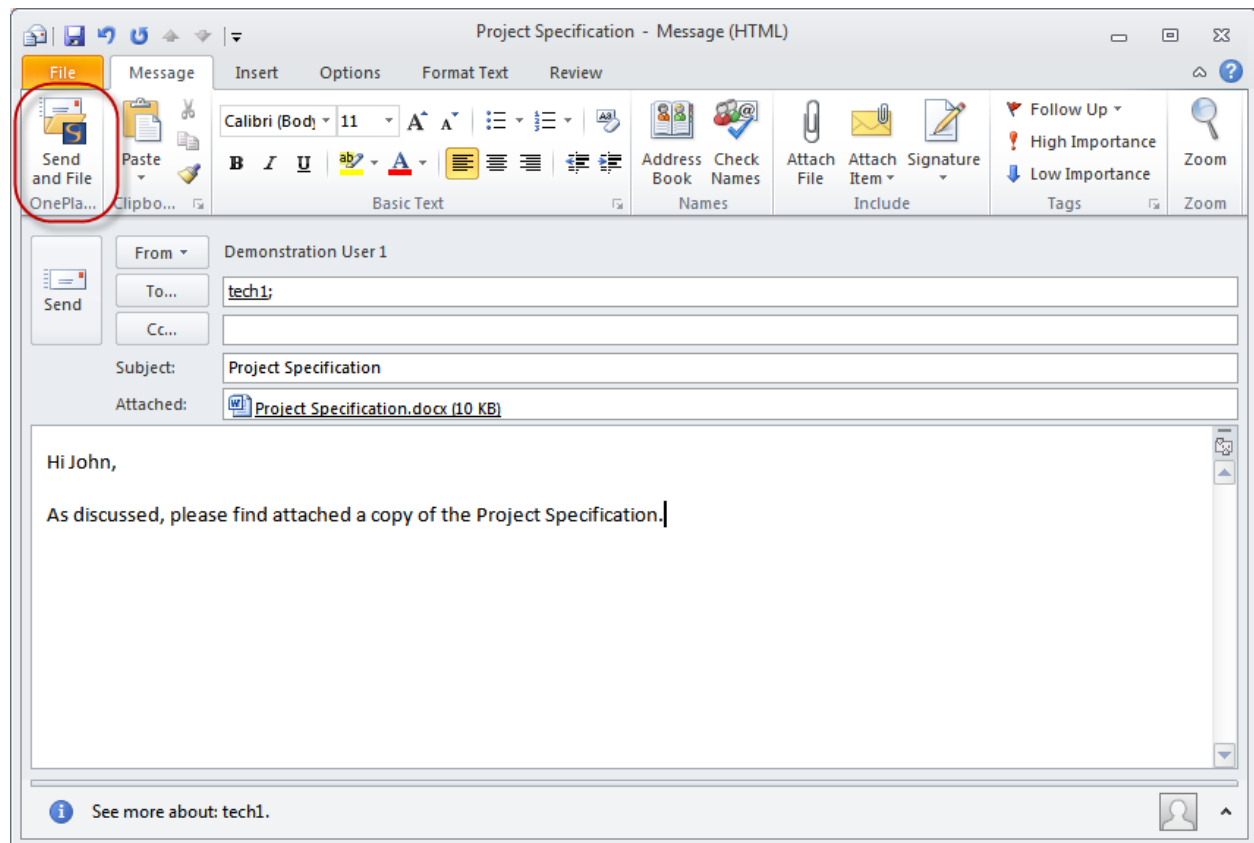
'Transferred to SharePoint' Category – Showing email messages successfully saved into SharePoint

Send and Save Emails to SharePoint

OnePlaceMail provides the facility to send and save emails directly to SharePoint. Saving a sent email to SharePoint can be accomplished by one of two methods.

1.6 Send and File Button/Ribbon - Office 2007 / Office 2010

An email can be sent and saved to SharePoint by clicking on the 'Send and File' (See Administrator Guide for changing the button name) button in Office 2007 and Office 2010 as shown in the screenshot below. After the email has been successfully sent, OnePlaceMail will present the Save to SharePoint Window to request the correct SharePoint location and completion of any additional metadata.

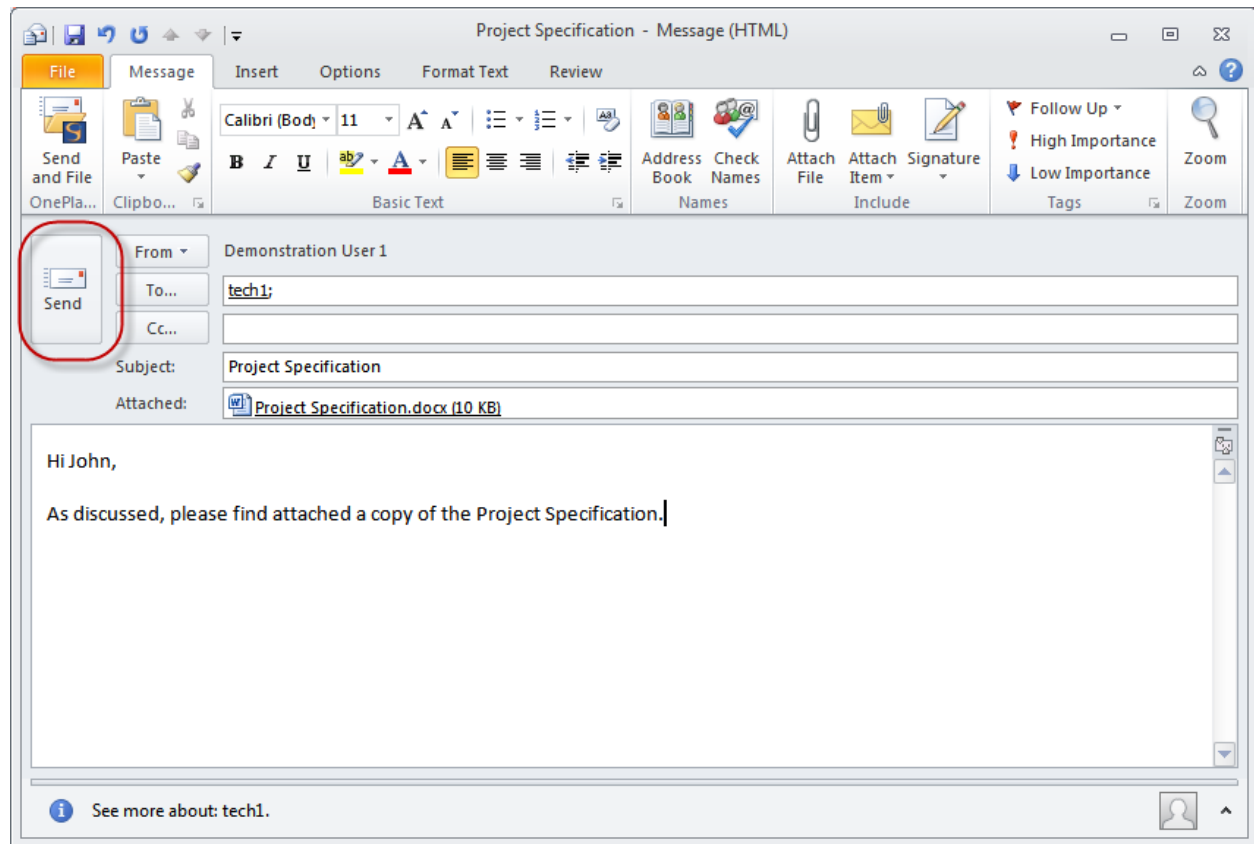


Send and File emails into SharePoint

In Office 2003 use the "Prompt on Send" option to file Sent emails to SharePoint as detailed below.

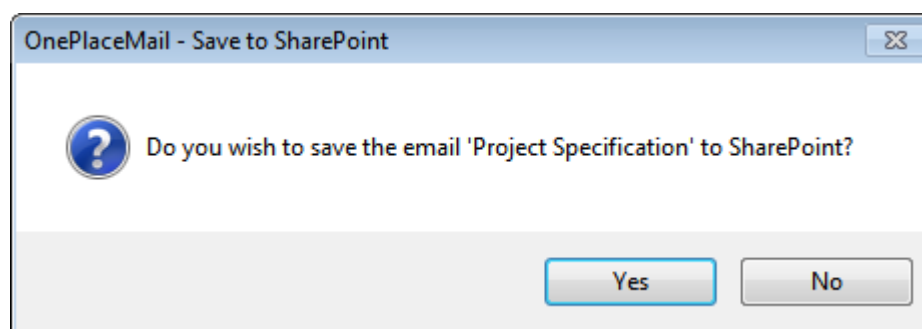
1.7 Automatically Prompt to Save on Send

OnePlaceMail can also automatically prompt the user on sending an email.



Using the normal Outlook Send Button

When the user selects the normal Outlook Send, they will be asked if they would like to save the sent email to SharePoint. This behavior is enabled by default but can be disabled in the OnePlaceMail – Settings if required.

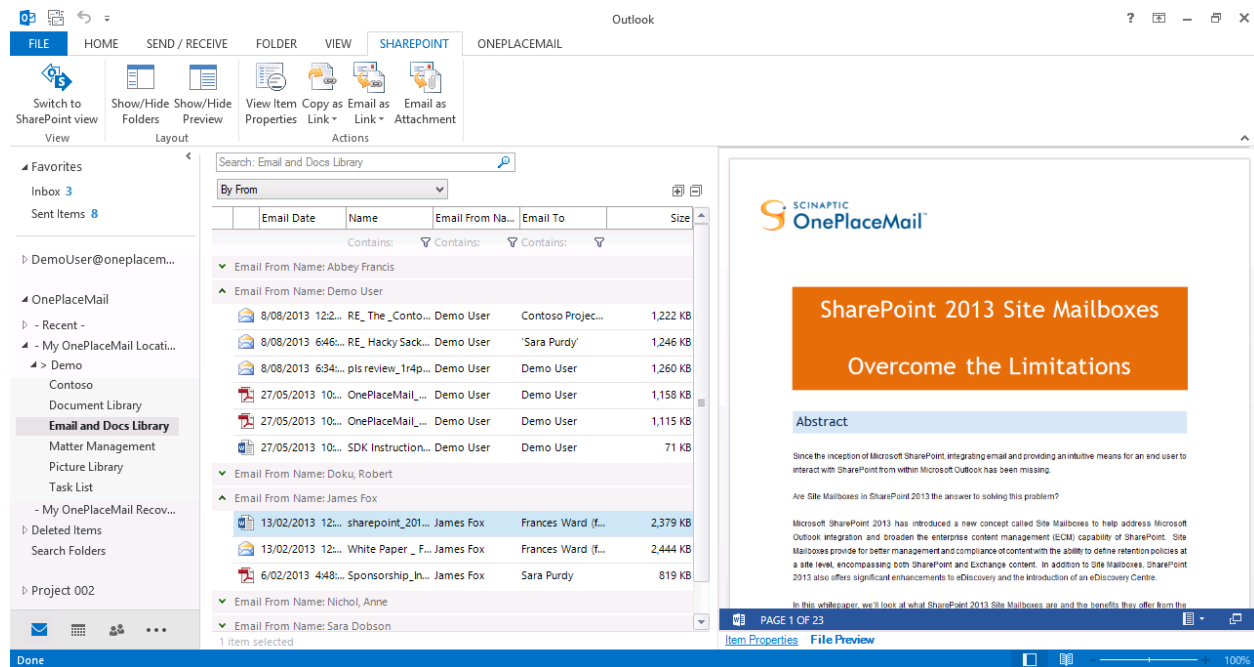


User Prompt asking to save a sent email into SharePoint

Microsoft Outlook Style Interface to SharePoint

The Microsoft Outlook style interface to SharePoint minimises change for the end user and helps encourage greater adoption of solutions built on your SharePoint Platform.

When a SharePoint location (Library, List, Folder, Document Set or Site) is selected on the left navigation of Outlook, the SharePoint content is presented in an 'Outlook Style Interface'.

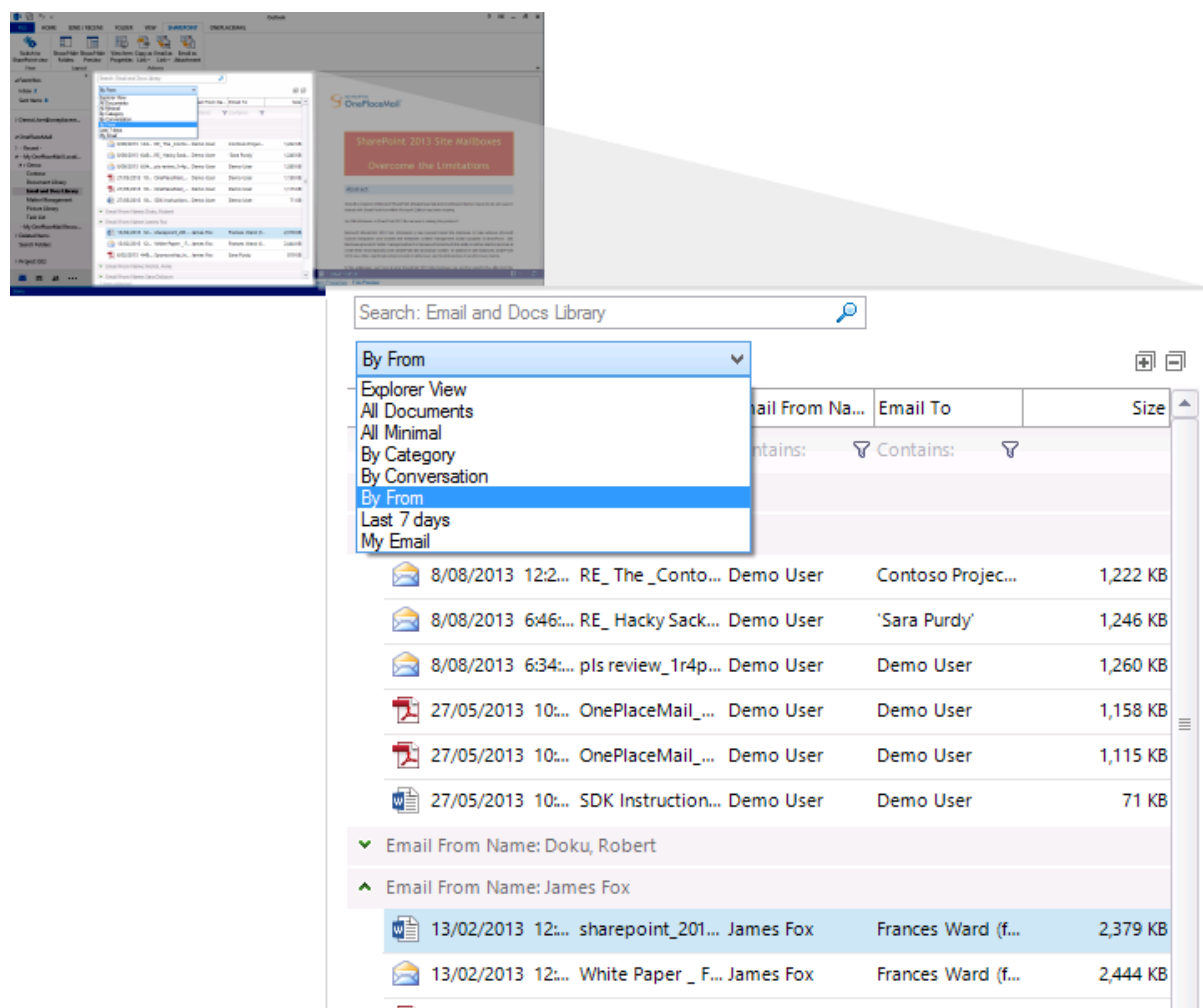


OnePlaceMail: Outlook Style Interface of SharePoint content

1.8 SharePoint Views within Outlook

The 'Outlook Style Interface' provides access to both SharePoint public and private views for the selected location. This includes all SharePoint view capabilities such as:

- Columns – including Managed Metadata, Enterprise keywords, External Data columns, Lookup Columns, etc...
- Grouping
- Sorting



Switch SharePoint views (public and private views)

1.9 Content Filtering and Sorting

In addition to the standard SharePoint view capabilities, you also have the ability to further filter content in the view to make finding content faster.

Search: Email and Docs Library

By From

	Email Date	Name	Email From Na...	Email To	Size
Cont...		sd	Contains:	Contains:	
Email From Name: Demo User					
	27/05/2013 10:...	SDK Instruction...	Demo User	Demo User	71 KB

Filter view content

Search: Email and Docs Library

By From

	Email Date	Name	Email From Na...	Email To	Size
Contains: sd			Contains:	Contains:	
Email From Name: Demo User					
	27/05/2013 10:...	SDK Instruction		ser	71 KB

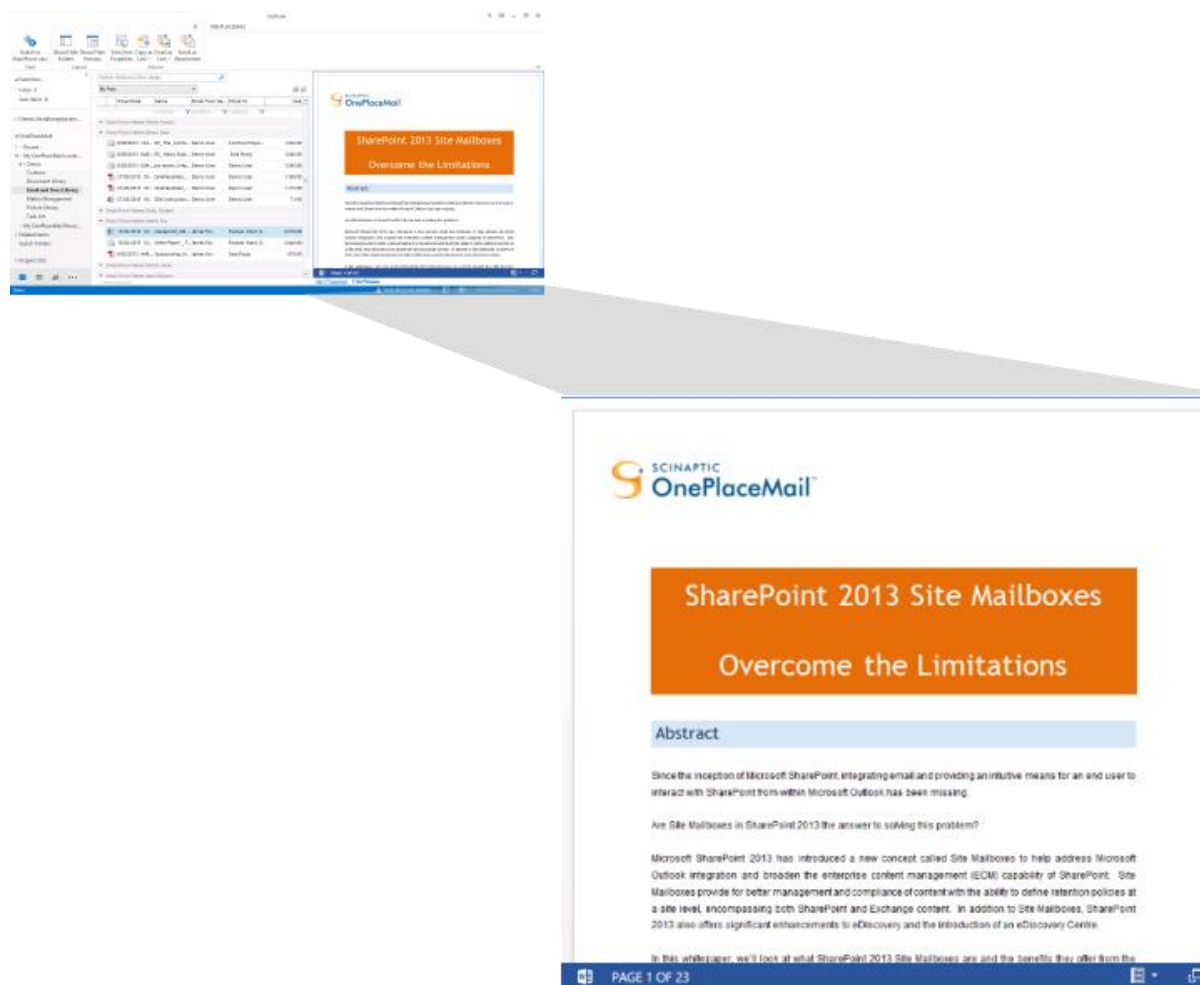
- No filter
- ☒ Contains
- Does not contain
- Starts with
- Ends with
- Equals
- Not equal to
- Is null
- Is not null
- Custom

Alternate filtering options

1.10 SharePoint Document & Email previews within Outlook

OnePlaceMail delivers Email and Document Previews within the 'Outlook Style Interface'. Where available, OnePlaceMail utilises the Office Web Application Server preview capabilities provided by SharePoint 2010, SharePoint 2013 and Office 365 environments to deliver highly efficient previews.

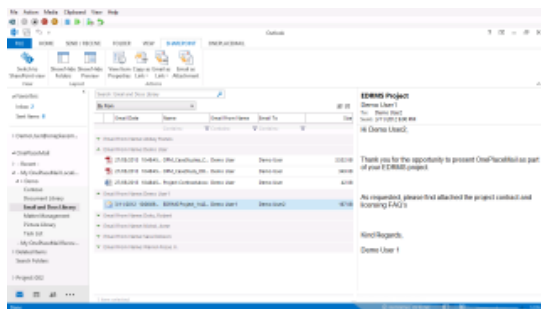
1.10.1 Embedded Preview Using Office Web Application Server



Document/File Preview using Office Web Apps

1.10.2 Embedded Preview of Email Messages

If an Office Web Application Server is not available or the file type is not supported by Office Web Apps (e.g. Email Messages), OnePlaceMail will deliver a local preview of the content.



EDRMS Project

Demo User1

To: Demo User2

Sent: 3/11/2012 9:00 PM

Hi Demo User2,

Thank you for the opportunity to present OnePlaceMail as part of your EDRMS project.

As requested, please find attached the project contract and licensing FAQ's

Kind Regards,

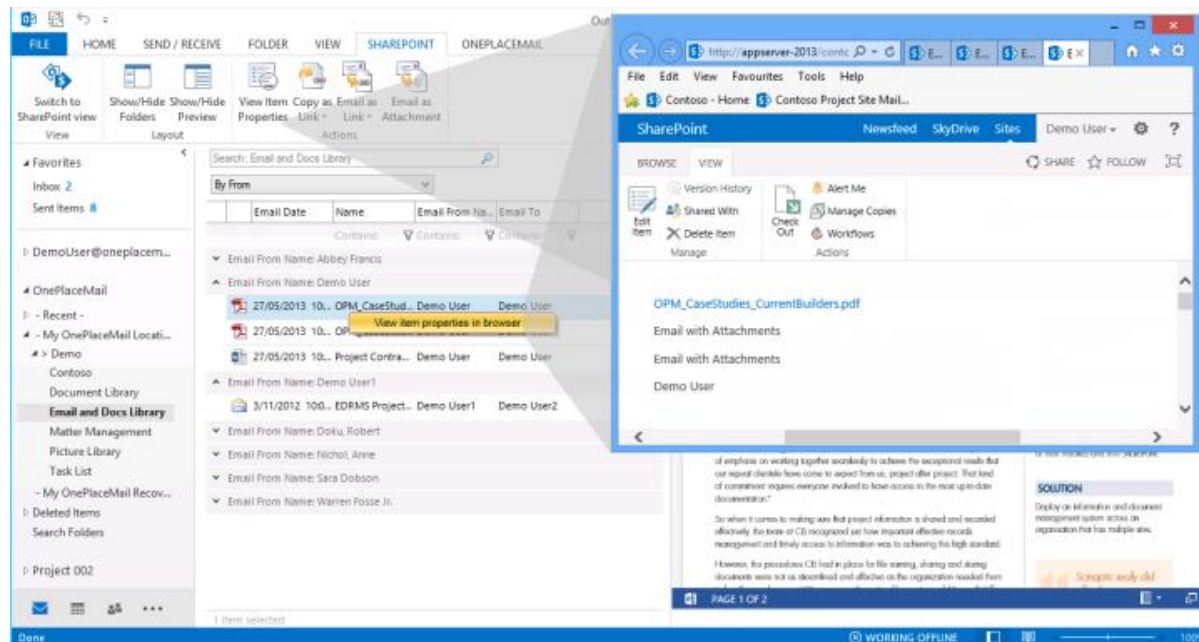
Demo User 1

Preview email messages

1.11 Access Items: View & Edit Items from Outlook and Start Workflows

Access to the Items Properties of the selected document is available using the 'View Properties' action on the ribbon or by performing a 'right-click' on an item. The View Item Properties page allows you to further edit the item and initiate workflows.

1.11.1 View Item Properties (or Right-clicking) on the selected Item.



Access Item Properties

1.12 Actions: Insert as Link/Attachment from SharePoint, View Properties

The Outlook Style Interface provides user actions to increase productivity when interacting with SharePoint.

1.12.1 Email as Links

The 'Email as Link' provides the ability to insert links direct to the document(s) or to the Item Properties. If the 'Document ID' feature has been enabled on SharePoint 2010 or SharePoint 2013, the links will be generated using the Document ID. This will minimise broken links in the event of a SharePoint restructure or items being moved as part of a records management solution.

Sending links to content stored in SharePoint helps reduce large attachments being sent across the network and encourages better collaboration on a single instance of the latest document within SharePoint.

The screenshot illustrates the 'Email as Link' functionality. On the left, the OnePlaceMail interface shows a list of documents. A red box highlights the 'Email as Link' option in the context menu. A red arrow points from this option to the 'Email as Link' button in the 'SHAREPOINT' tab of the 'MESSAGE' window. The 'MESSAGE' window shows the email composition interface with the 'From' field set to 'DemoUser@oneplacemail.com'. The 'Subject' field is empty. The 'Body' of the email contains the following links:

- [OPM CaseStudies CurrentBuilders.pdf](#)
- [OPM CaseStudy DBCED.PDF](#)
- [Project Contract.docx](#)
- [EDRMS Project 1r42ds1p.msg](#)

Below the email composition window, a table displays the email history:

Email Date	Name	Email From Na...	Email To	
Contains: Contains: Contains:				
Email From Name: Abbey Francis				
Email From Name: Demo User				
27/05/2013 10...	OPM_CaseStud...	Demo User	Demo User	3,532 KB
27/05/2013 10...	OPM_CaseStud...	Demo User	Demo User	349 KB
27/05/2013 10...	Project Contrac...	Demo User	Demo User	42 KB
Email From Name: Demo User1				
3/11/2012 10:0...	EDRMS Project...	Demo User1	Demo User2	167 KB

Insert selected items as Links

1.12.2 Email as Attachments

There are circumstances where sending content from SharePoint as an attachment is required. OnePlaceMail allows you to use the 'Email as Attachment' for one or more selected items.

The screenshot illustrates the process of sending SharePoint content as email attachments. On the left, the OnePlaceMail interface shows a list of items under the 'SHAREPOINT' tab. A red box highlights the 'Email as Attachment' action in the 'Actions' menu. A red arrow points from this action to the 'Send' button in the email composition window on the right.

The email composition window, titled 'Untitled - ...', shows the following details:

- From:** DemoUser@oneplacemail.com
- To...** (empty field)
- Cc...** (empty field)
- Subject:** (empty field)
- Attached:**
 - OPM CaseStudies CurrentBuilders.pdf (3 MB);
 - OPM CaseStudy DBCED.PDF (350 KB);
 - Project Contract.docx (43 KB);
 - EDRMS Project

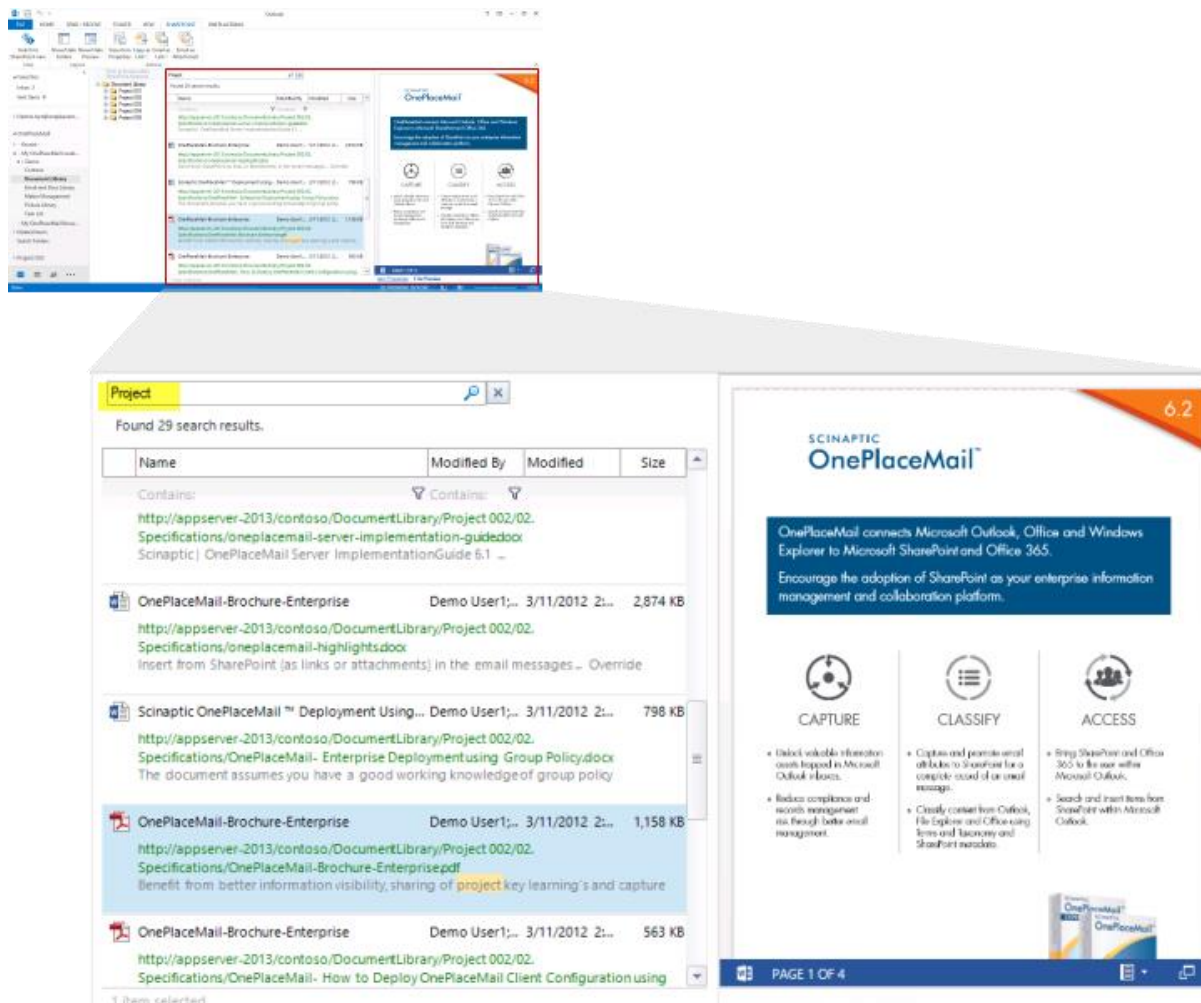
Below the email composition window, a table displays the email history:

Email Date	Name	Email From Na...	Email To	Size
Contains: Contains: Contains: Contains:				
Email From Name: Abbey Francis				
Email From Name: Demo User				
27/05/2013 10:...	OPM_CaseStud...	Demo User	Demo User	3,532 KB
27/05/2013 10:...	OPM_CaseStud...	Demo User	Demo User	349 KB
27/05/2013 10:...	Project Contrac...	Demo User	Demo User	42 KB
Email From Name: Demo User1				
3/11/2012 10:0...	EDRMS Project...	Demo User1	Demo User2	167 KB

Insert selected items as attachments

1.13 Search within the Outlook Style Interface

In addition to browsing SharePoint, OnePlaceMail provides the power of SharePoint search within the Microsoft Outlook interface. The search results show 'hit highlighting' for search terms and previews for selected search result items.



Search SharePoint from within the Outlook Style Interface

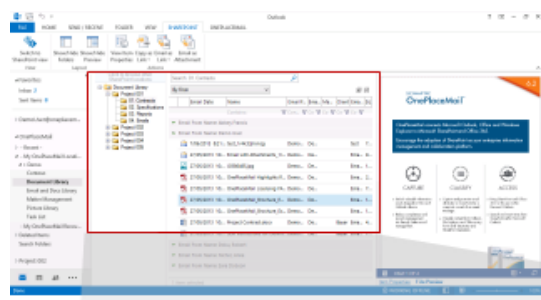
1.14 Library Folder Hierarchy

Folders (and Document Sets) are presented to the end user without impacting Microsoft Outlook performance and usability.

1. Large folder structures from SharePoint are considered with respect to new, modified and deleted folders along with relevant security privileges for the current user without the need for synchronisation and caching. Therefore, large folder structures are delivered in a high performance manner and are available from Microsoft Outlook, File Explorer and Office (Word, Excel and PowerPoint)
2. The user experience within Microsoft Outlook is not cluttered with unnecessary SharePoint folders sitting on the left navigation. Access to relevant SharePoint locations and content is streamlined, resulting in greater end user adoption.

1.14.1 Browse SharePoint

When browsing SharePoint locations, OnePlaceMail presents SharePoint library folder structures in an efficient and user friendly manner as shown in the screenshot below.



Click to browse other SharePoint locations

- Document Library
 - Project 001
 - 01. Contracts
 - 02. Specifications
 - 03. Reports
 - 04. Emails
 - Project 002
 - Project 003
 - Project 004
 - Project 005

Search: 01. Contracts

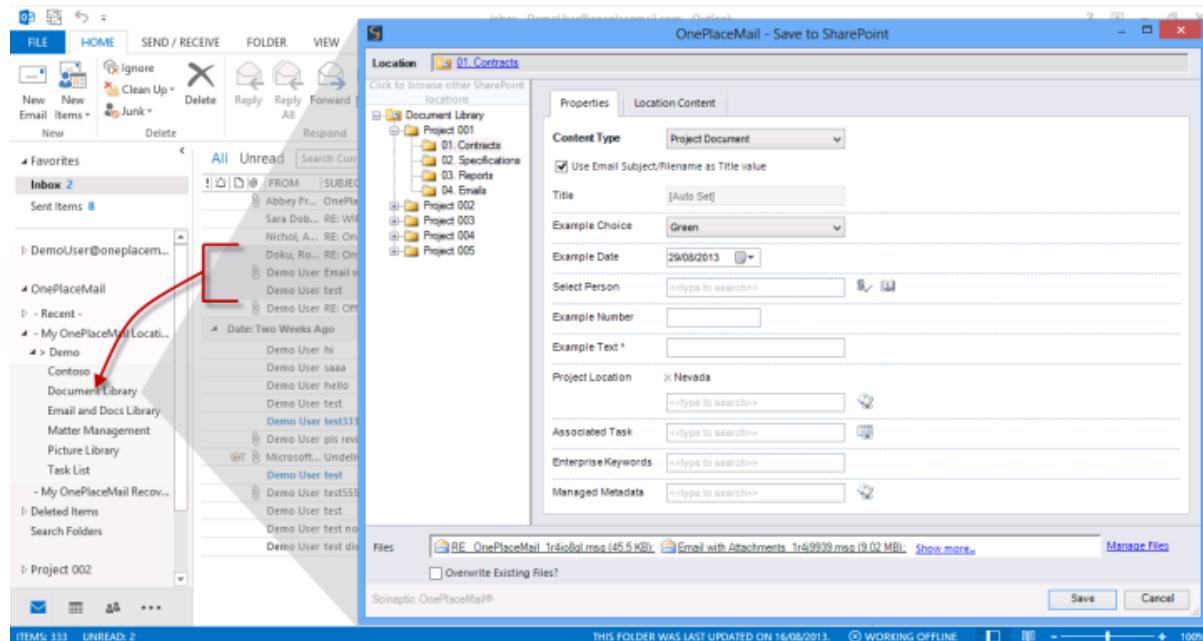
By From

	Email Date	Name	Email F...	Ema...	Ma...	Client	Ema...	Siz
Contains:								
▼ Email From Name: Abbey Francis								
▲ Email From Name: Demo User								
	7/06/2013 8:21...	test_1r4k33jh.msg	Demo...	De...			test	7...
	27/05/2013 10...	Email with Attachments_1r...	Demo...	De...			Ema...	9...
	27/05/2013 10...	J0386485.jpg	Demo...	De...			Ema...	1...
	27/05/2013 10...	OnePlaceMail Highlights R...	Demo...	De...			Ema...	2...
	27/05/2013 10...	OnePlaceMail Licensing FA...	Demo...	De...			Ema...	7...
	27/05/2013 10...	OnePlaceMail_Brochure_E...	Demo...	De...			Ema...	1...
	27/05/2013 10...	OnePlaceMail_Brochure_Ex...	Demo...	De...			Ema...	1...
	27/05/2013 10...	Project Contract.docx	Demo...	De...		Bayer	Ema...	4...

Browse Library Document Sets & Large Folder Structures

1.14.2 Saving to SharePoint

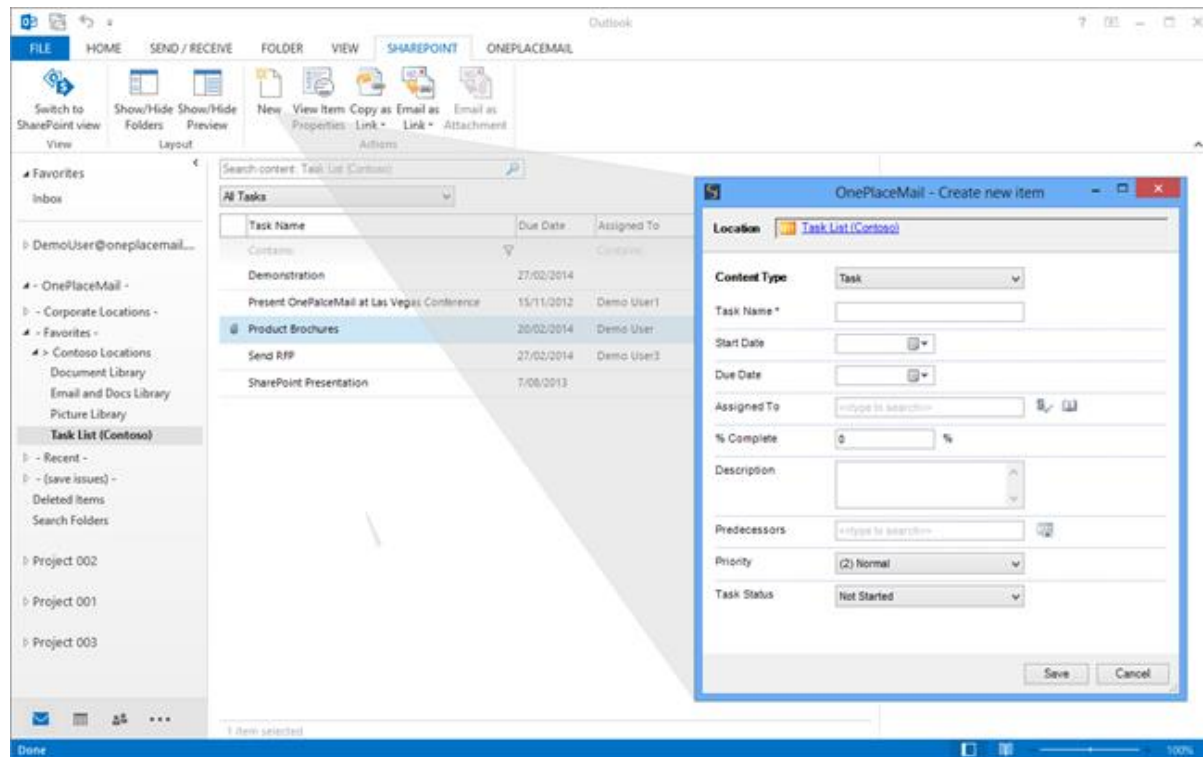
The Save to SharePoint window presents the sub-folders for the location you have selected to save content.



Save to Document Sets & Large Folder Structures within SharePoint

1.15 Create new List Items from Outlook

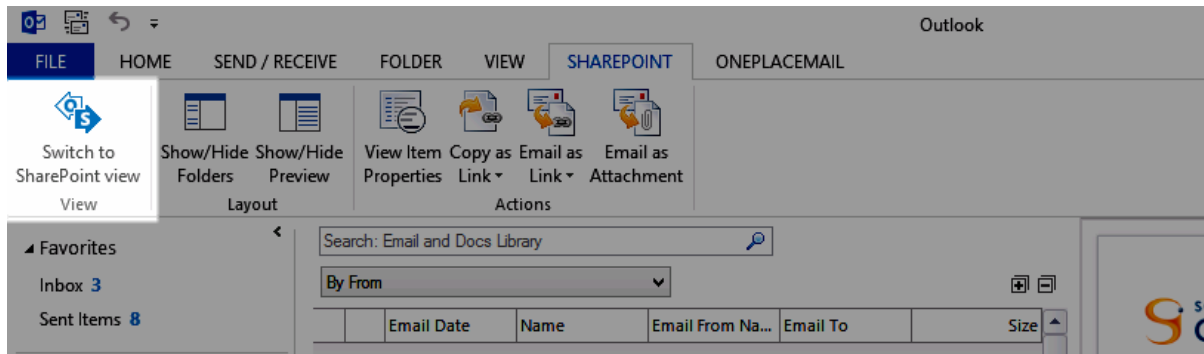
When browsing a SharePoint list within Outlook you can create new list items.



Create new list items from Microsoft Outlook

1.16 Outlook / SharePoint Toggle

The user has the option to toggle between the 'Outlook Style Interface' and the Microsoft SharePoint Web Browser interface.



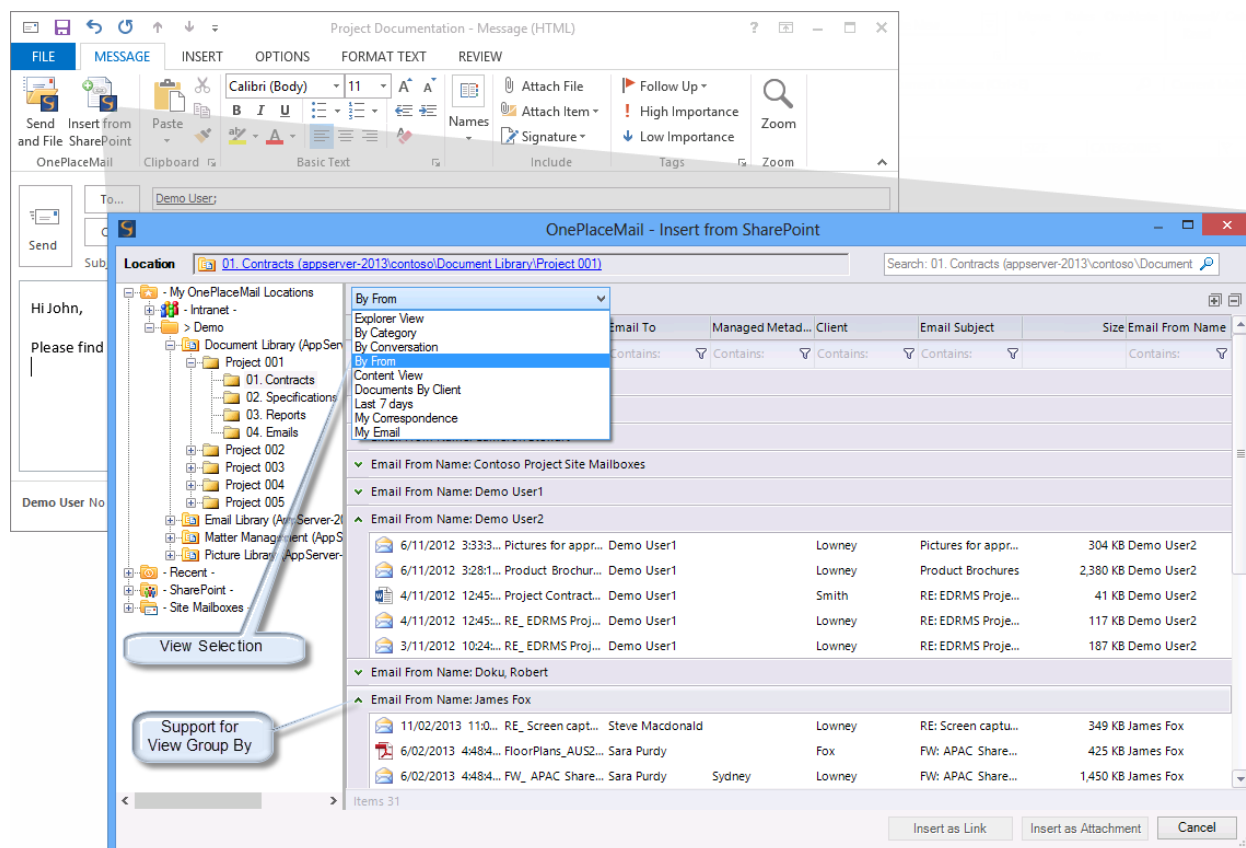
Toggle between 'Outlook Style Interface' of SharePoint Web Browser Interface

Insert from SharePoint

OnePlaceMail provides the ability to insert links or attachments from Microsoft SharePoint when writing an email message. This discourages duplicate documents, reduce excessive storage in Microsoft Exchange or network traffic from emails with attachments.

From a draft/reply email message, select 'Insert from SharePoint'.

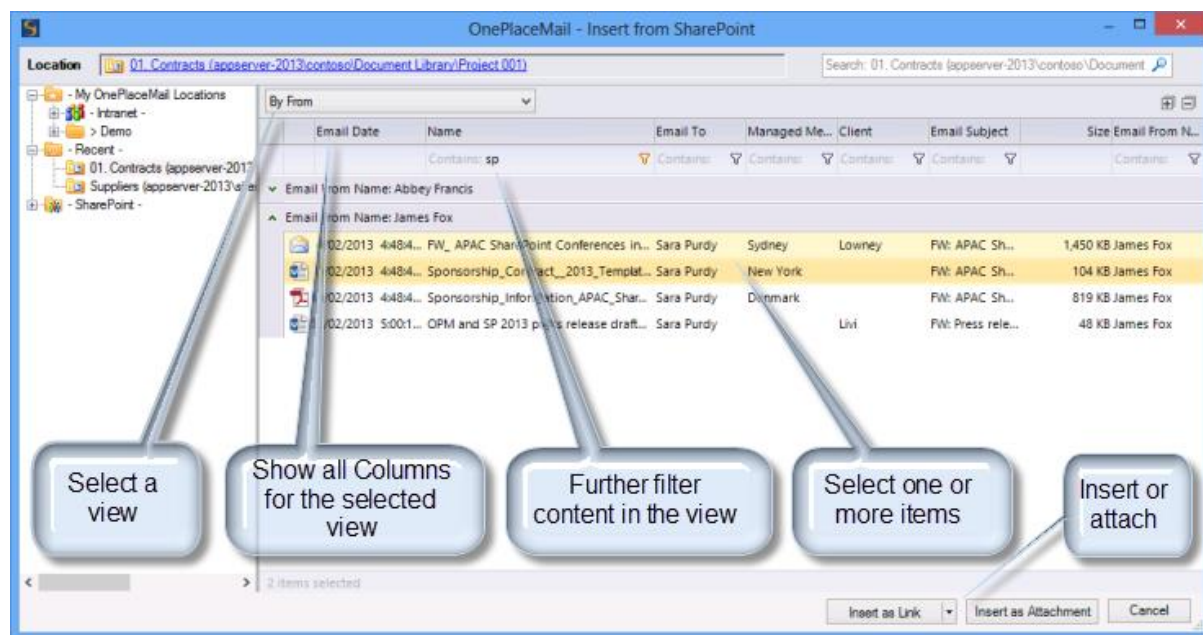
The view selection drop down allows you to switch between the public and private views defined for the selected location. The window supports most SharePoint view capabilities, such as as group by, view filtering, sorting and standard SharePoint columns.



Insert from SharePoint

Refer to the following KB article for [defining a specific view for the Insert from SharePoint Window](#).

The Insert from SharePoint window also allows you to further filter the view content as shown in the screenshot below.



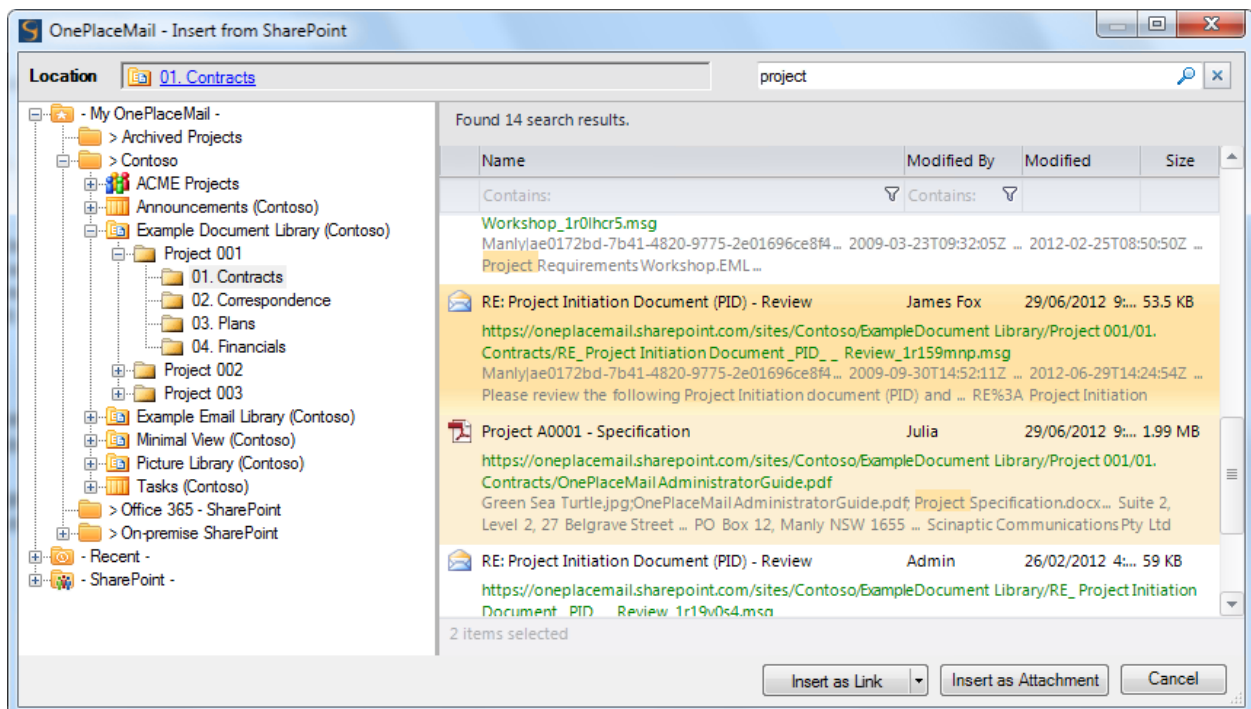
Filter content from the SharePoint view

1.17 Browse Recent, Favorite locations

The Insert from SharePoint window provides the ability to browse your recent and favourite SharePoint locations. You can also browse your entire (security trimmed) SharePoint environment using the navigation tree on the left hand side of the window.

1.18 Search and link to SharePoint content

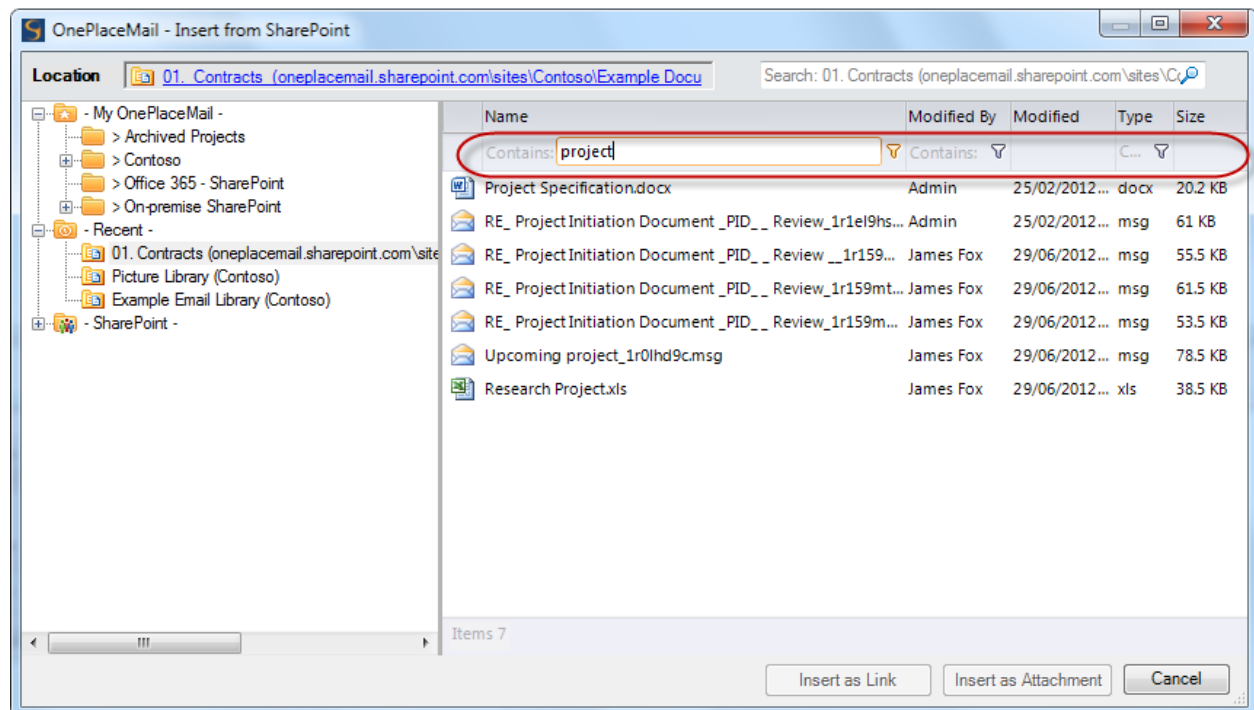
The top right hand side of the window provides the ability to search your SharePoint content (both metadata and file content) as indexed within SharePoint. The search results are displayed with full hit highlighting of your results. You can select one or more items to insert or attach.



Search SharePoint from the Insert window

1.19 Filter and Sort Content

You can filter and sort when browsing content or viewing search results.



Filter and Sort Content

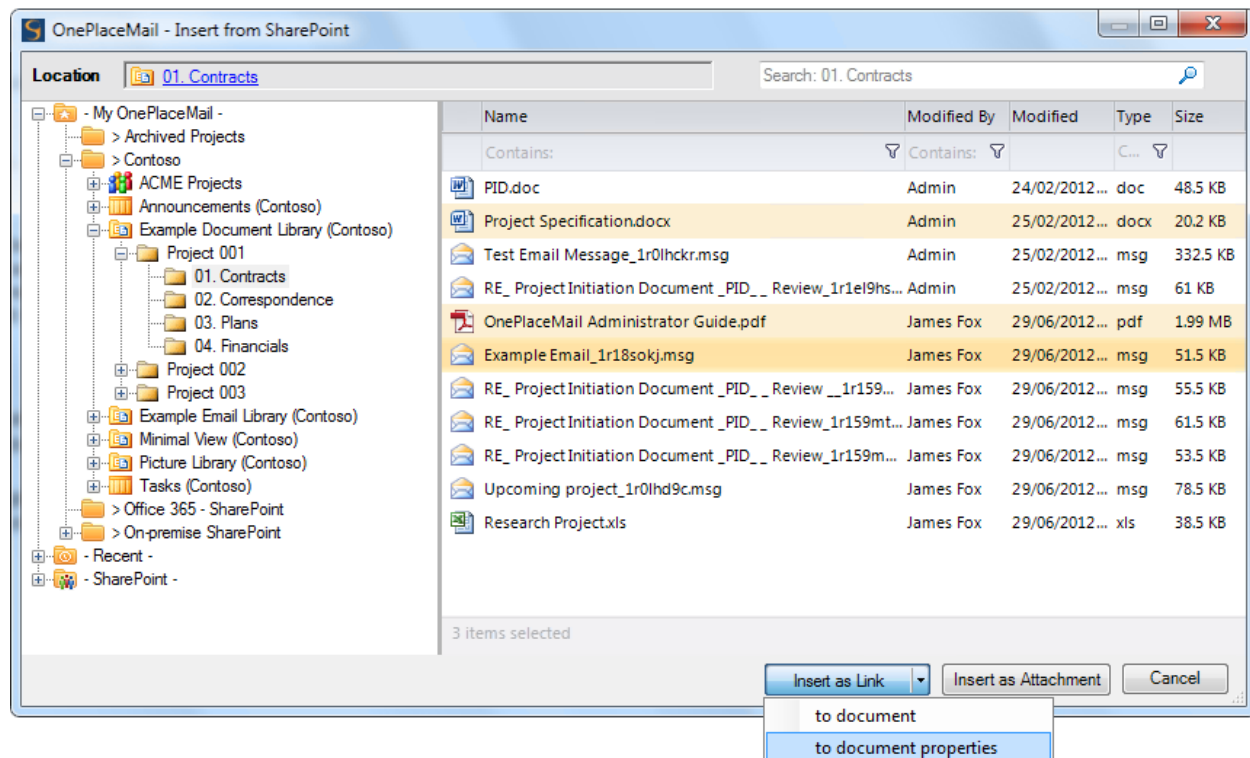
1.20 Link directly to Document

The default linking option is to link directly to the document within the SharePoint Item. For example: to the Word or PDF Document.

1.21 Link to SharePoint Document Properties

OnePlaceMail provides the ability to also link to the Document Properties. Therefore, allowing the user to access the metadata of the item in SharePoint in addition to the document.

You can insert links to List items in addition to SharePoint library items



Insert a link to the Document Properties

1.22 SharePoint Document ID

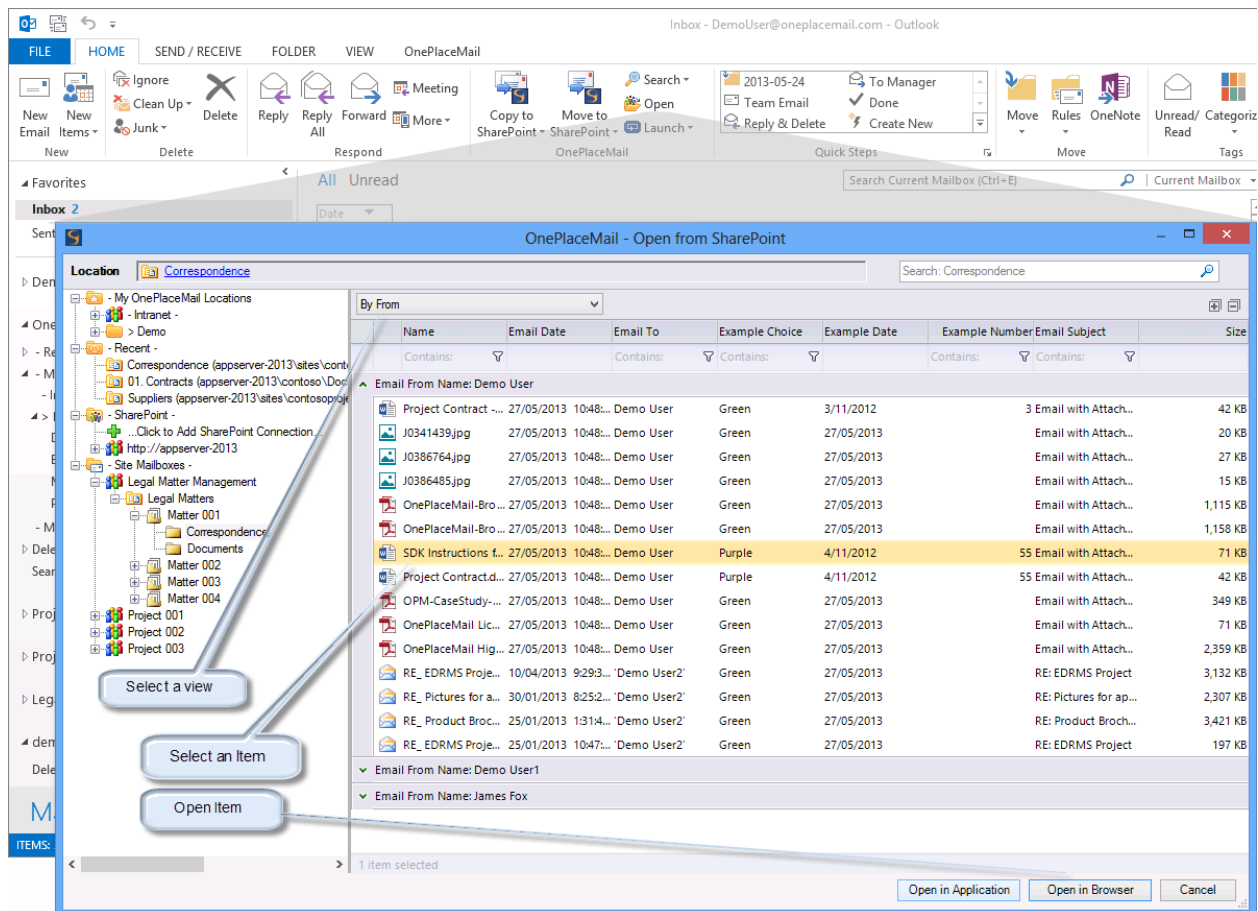
If the SharePoint 2010 Document ID Feature has been enabled, OnePlaceMail will generate links using the Document ID. Therefore, links are not broken if content is moved in SharePoint.

1.23 Insert Attachments (for external Recipients)

Select the Insert as Attachment button to insert the selected documents as attachments to an email. This is useful when sending an email to external recipients.

Open from SharePoint

From within Outlook and other office applications such as Word, Excel and PowerPoint, OnePlaceMail provides the ability to Open from SharePoint.



1.24 Search or Browse

The window provides the same advanced browser and search capabilities as provided by the Insert from SharePoint window.

1.25 Open in Application

The Open in Application button will open the select document in the native desktop application. For example, a Word Document (.docx, .doc) will open within Microsoft Word and an email message (.msg) will open in Microsoft Outlook.

1.26 Open in Browser

If the SharePoint 2010 Open in Browser Feature has been enabled in your SharePoint environment, OnePlaceMail will provide the option to the document within the web browser.

Manage Email Attachments

OnePlaceMail provides control around managing and helping reduce the number of email attachments sent.

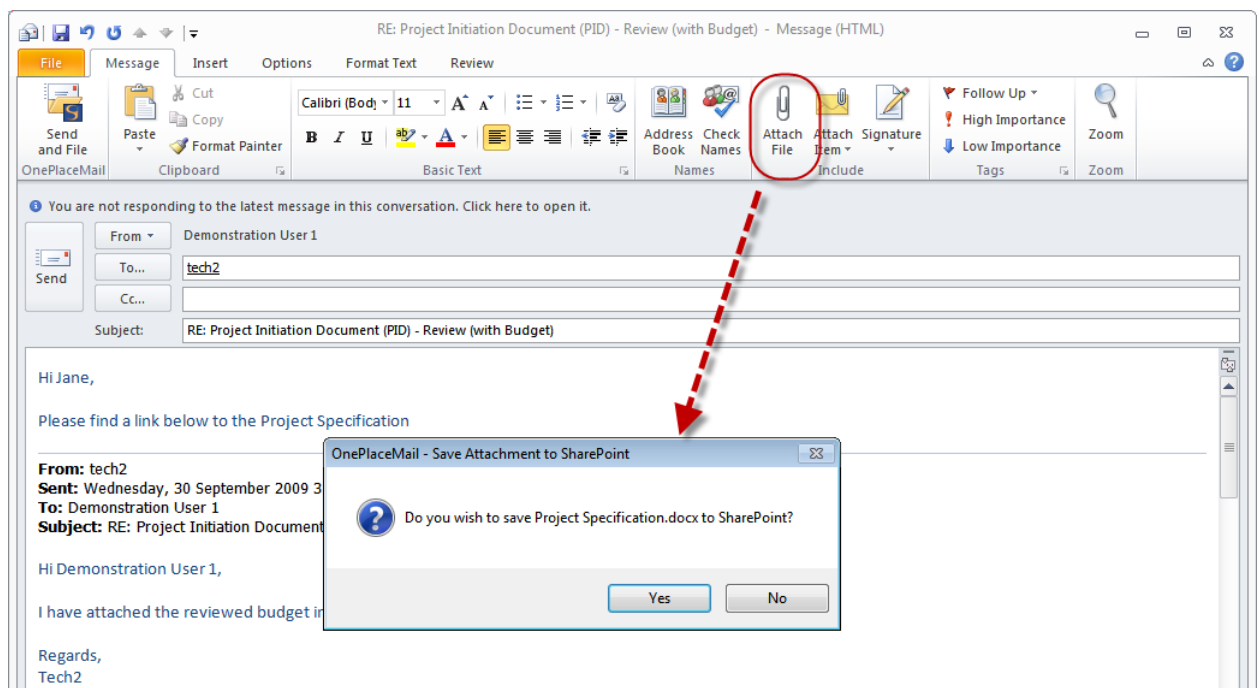
1.27 Save Attachment to SharePoint and Add link to Email

When an attachment is added to an email, the user will have the option of uploading the attachment to SharePoint and placing a URL link in the email to the uploaded item.

The '**Prompt to 'Save to SharePoint' when adding attachments to an email**' setting can be enabled/disabled in the OnePlaceMail – Settings window.

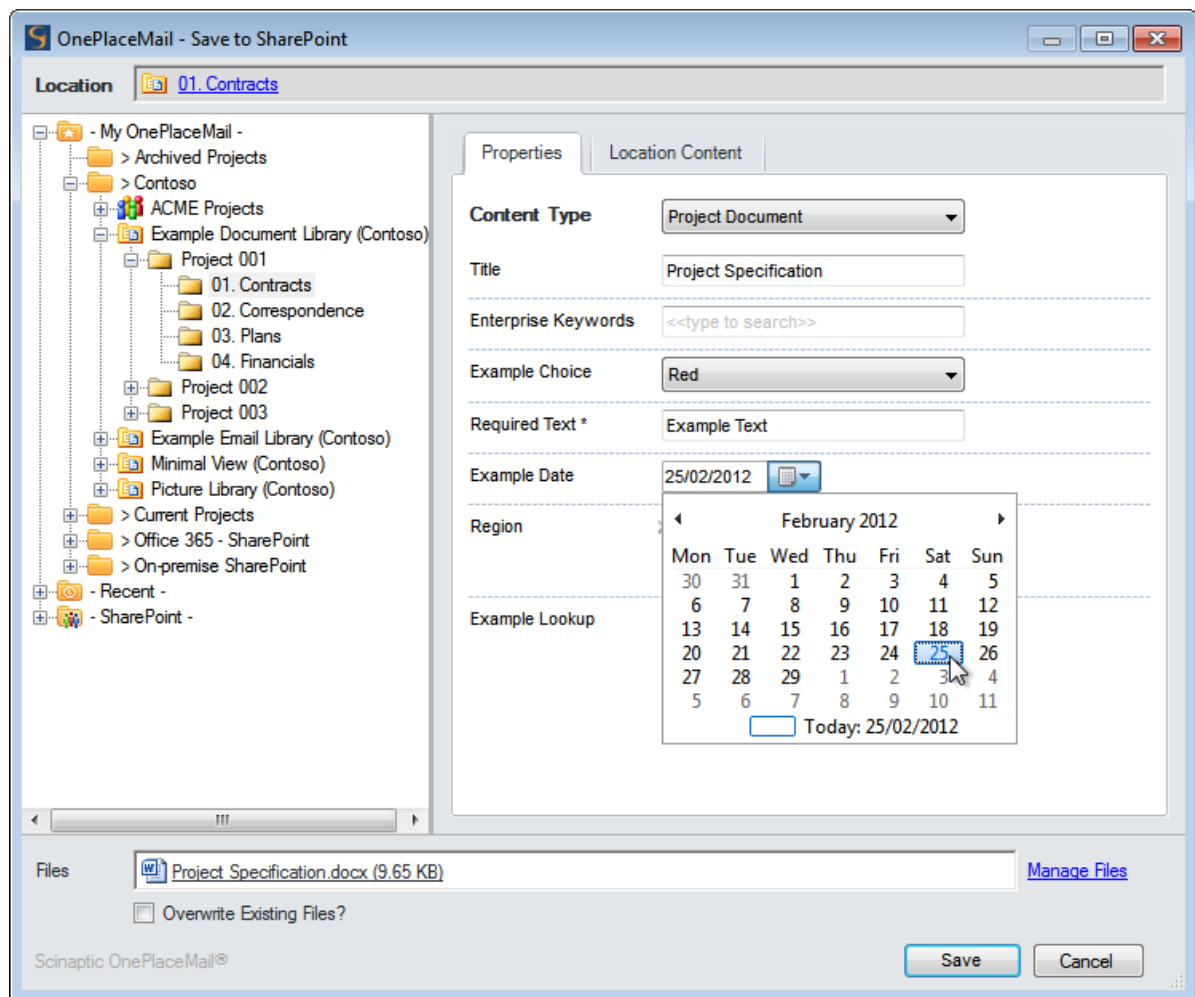
To use the feature, follow these steps:

- 1) Create a new email message and click **Attach File** (you can also drag and drop files from your desktop into the email message)
- 2) Select the file you wish to upload. You will see the following prompt **Do you wish to transfer [file] to SharePoint?** Click **Yes** if you would like OnePlaceMail to upload the file to SharePoint and insert a URL link in the email to the uploaded item. Click **No**, if you would like to attach the file to the email without saving it to SharePoint.



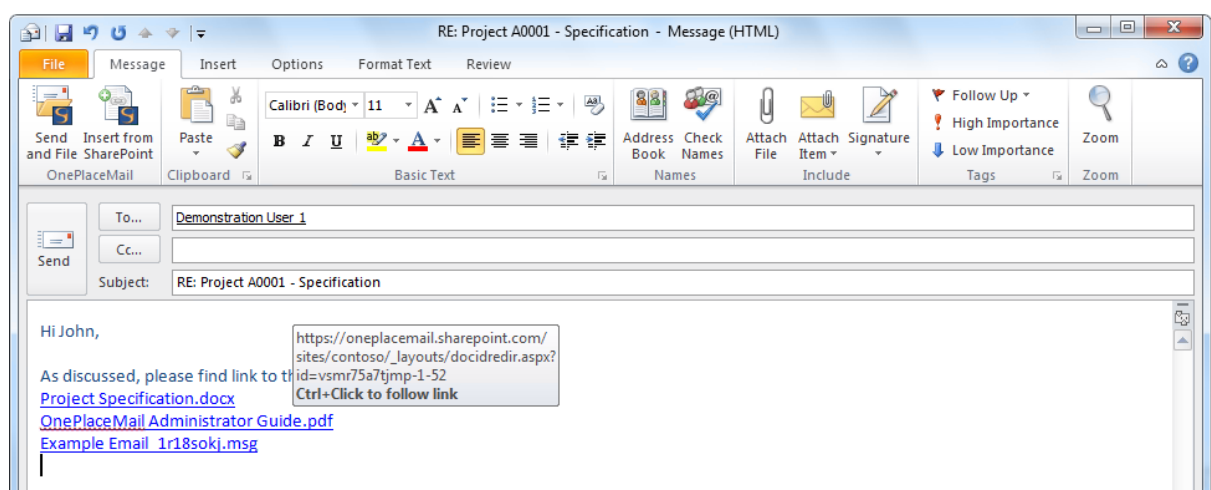
Save email attachment into SharePoint and replace attachment with a link

- 3) If you click **Yes**, the familiar Save to SharePoint window will appear which allows you to select the SharePoint location and complete additional metadata if required. Click **Save**.



Save to SharePoint and complete metadata

- 4) OnePlaceMail will insert a link (using the SharePoint 2010 Document ID if enabled) to the uploaded file within SharePoint. Click **Send** to send the email. The recipient can access the file by clicking on the link in the email.

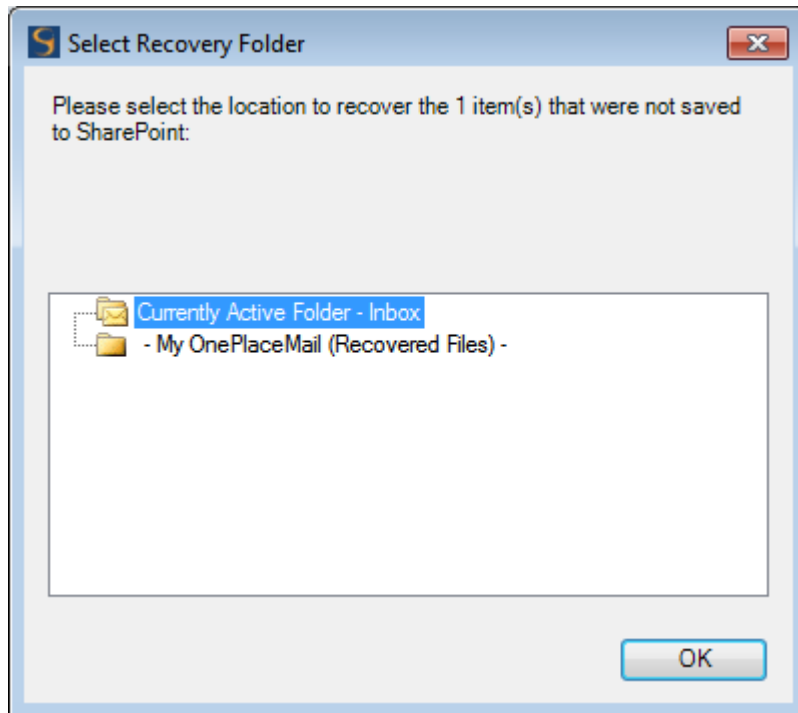


Email with link to attachment in SharePoint

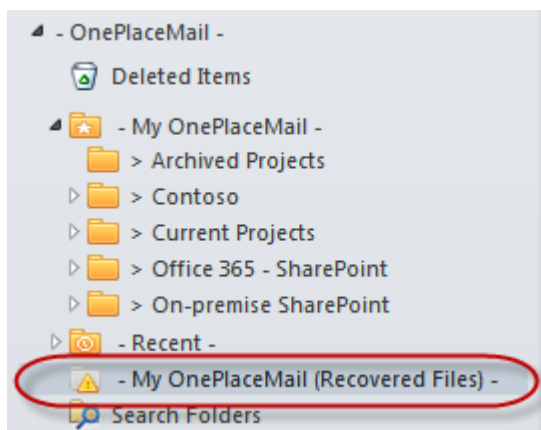
1.28 File Recovery on Cancel

If emails are moved via a drag & drop action to a folder representing a SharePoint location and you decide to select the **Cancel** button on the Save to SharePoint window, or if there is a problem saving the files, the user is prompted if they would like to recover the emails.

The Select Recovery Folder window will display. OnePlaceMail will try to determine the original location of the item and provide this as an option for the recovery location. Alternatively, the file will be recovered to the **My OnePlaceMail (Recovered Files)** folder for further user intervention.



Select Recovery Folder window

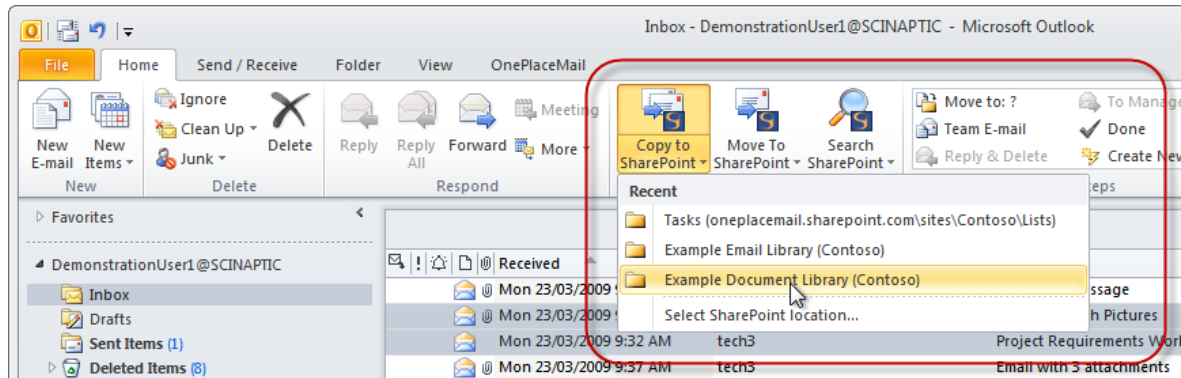


My OnePlaceMail (Recovered Files) folder

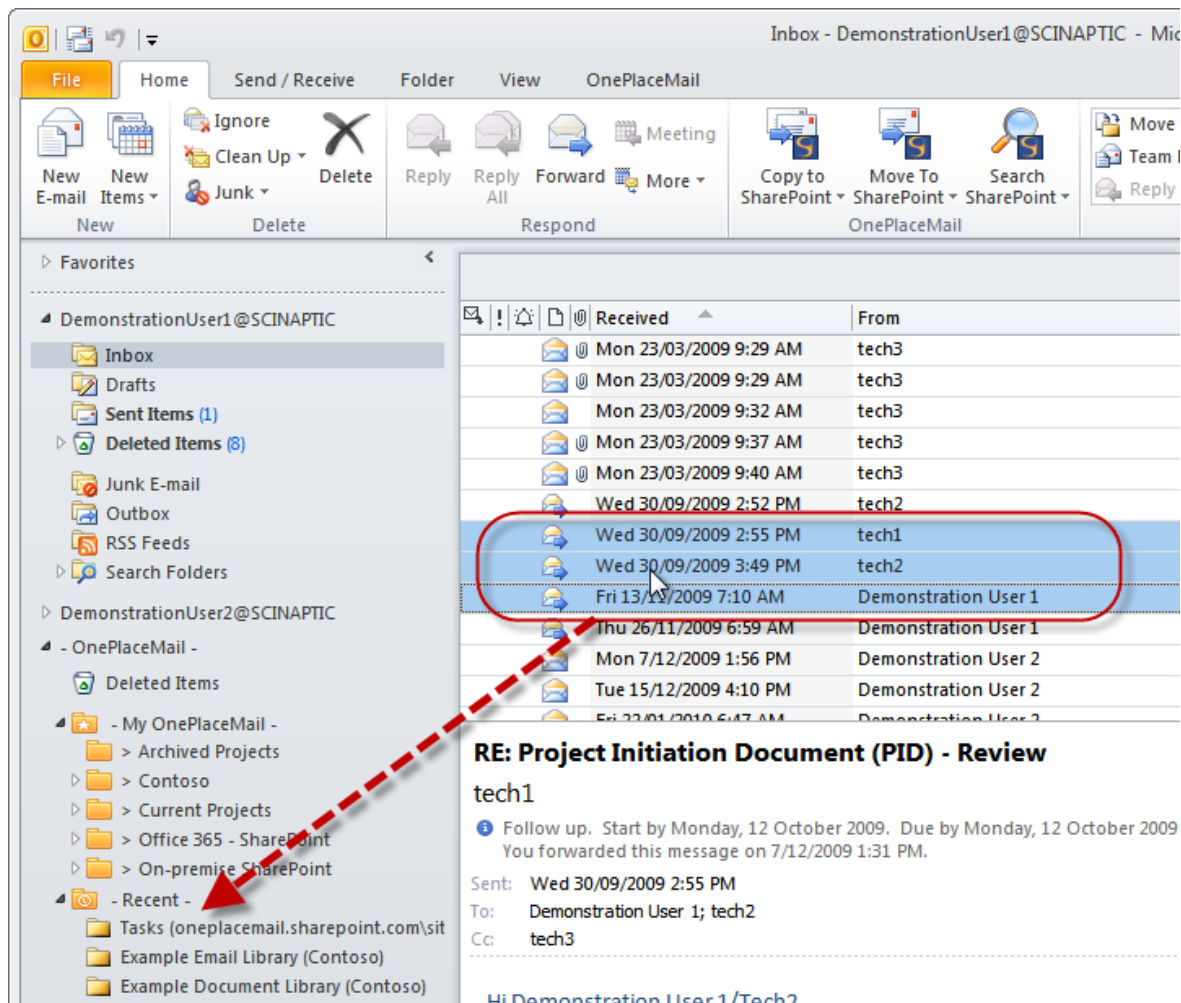
You can select the Recovered Files folder and drag your files back into your inbox or any other preferred folder.

Recent Locations

OnePlaceMail remembers the SharePoint locations where you saved content and provides convenient access to these locations for future filing operations using the Copy To / Move To buttons or by performing a drag/drop operation on the left navigation of Outlook.

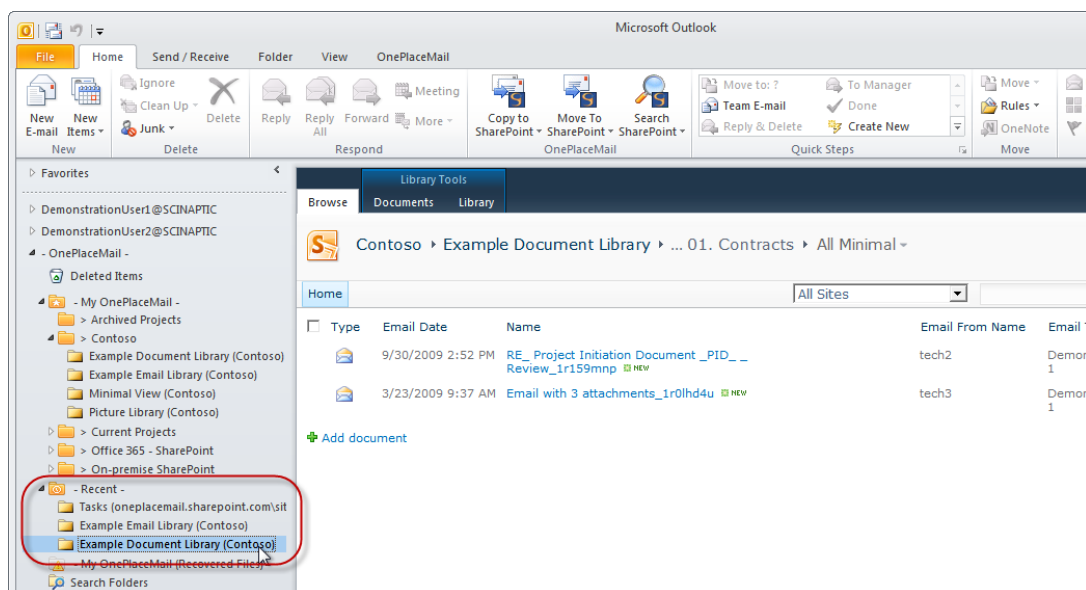


Recent Locations under the 'Copy To' / 'Move To' buttons within Outlook



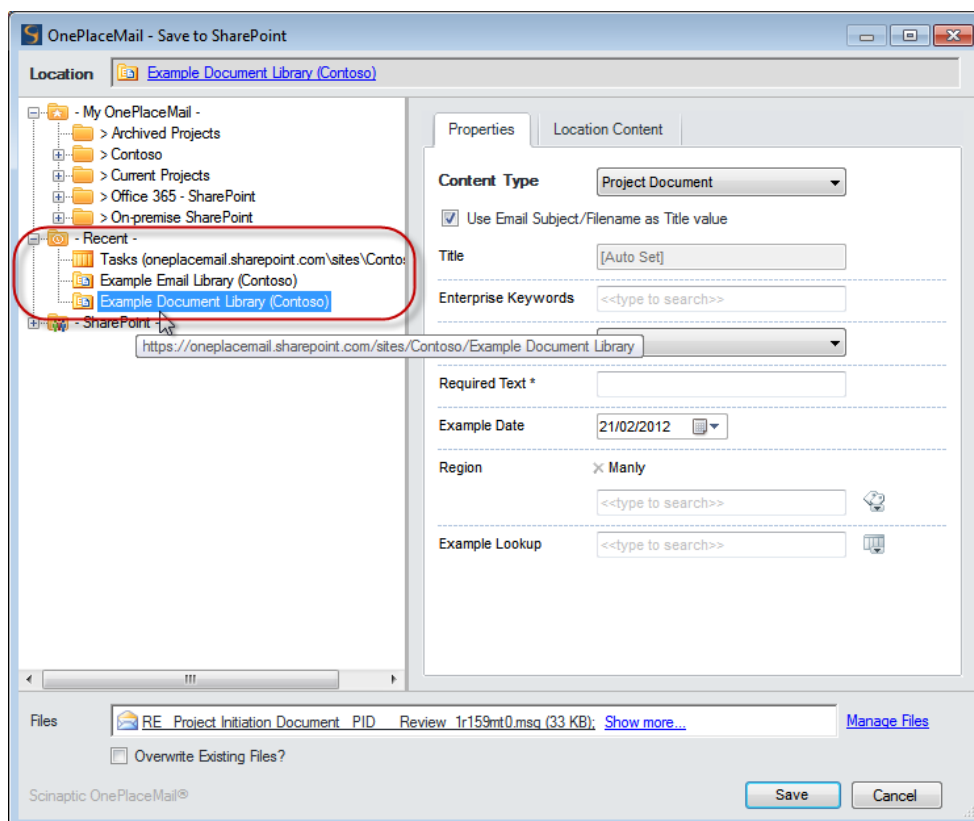
Drag / Drop to Recent Locations

The Recent location folders are available on the left navigation of Outlook for easy access to SharePoint content.



Select a Recent Location folder to access SharePoint

The Save to SharePoint window provides the same Recent locations when saving files from Windows Explorer or documents from Microsoft Office (Word, Excel and PowerPoint)



Save to a Recent Location

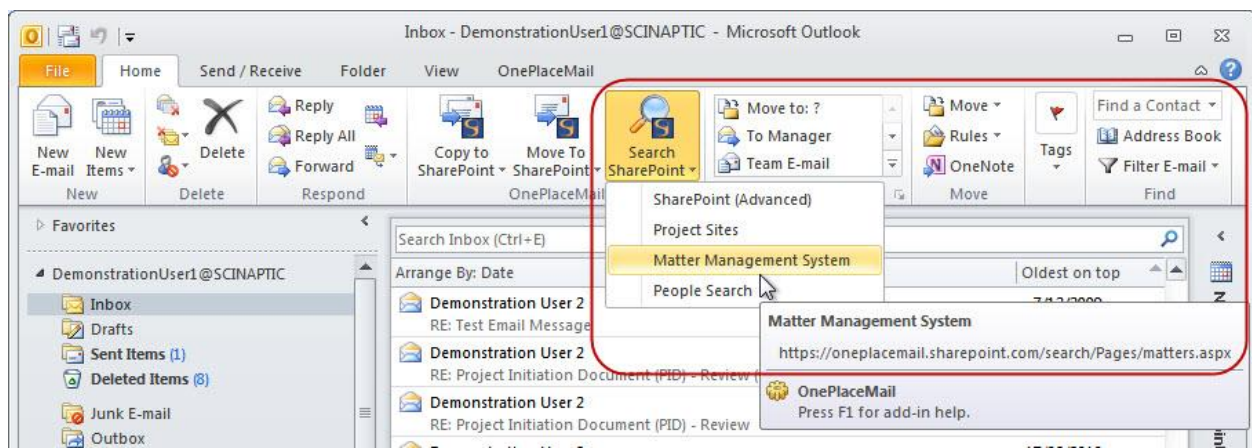
Search and Access SharePoint from within Outlook

SharePoint content including files, emails and email attachments can be accessed directly from within Outlook. Access to information stored in SharePoint is using the full SharePoint security model. Email metadata is captured automatically and made available for creating views, indexing and searching.

OnePlaceMail extends the power of Microsoft SharePoint to Microsoft Outlook. Enhancements or specific customizations applied to SharePoint are made available within the Outlook interface, therefore promoting the adoption of SharePoint across the enterprise.

1.29 Connect to one or more SharePoint Search locations/Scopes

OnePlaceMail allows you to define one or more search locations / scopes. These search locations are available in Microsoft Outlook and other Office applications (Word, Excel and PowerPoint)



Select a SharePoint location/scope to search

Refer to the OnePlaceMail Settings area later in this guide for instructions on defining the Search Locations.

1.30 Search SharePoint Content from Outlook

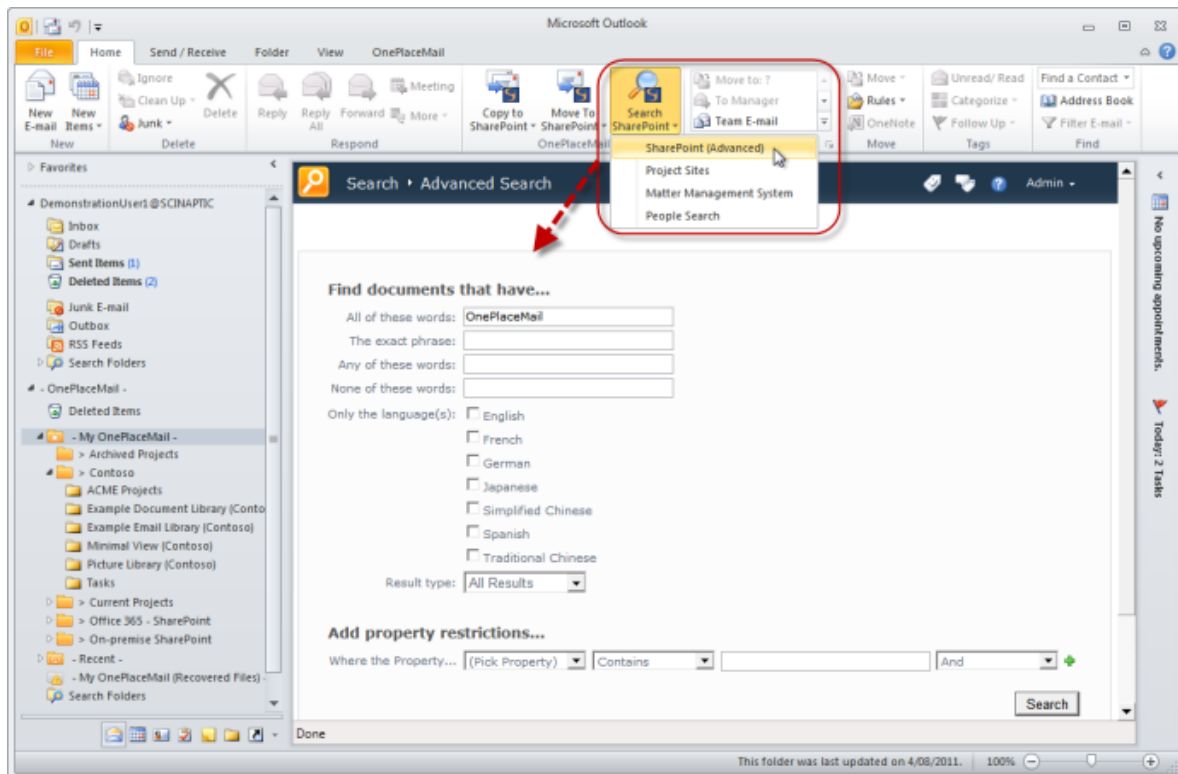
1.30.1 How to Search SharePoint from Outlook

OnePlaceMail allows you to take advantage of the SharePoint search capabilities without leaving Outlook

For example, you can use the following searches and filters:

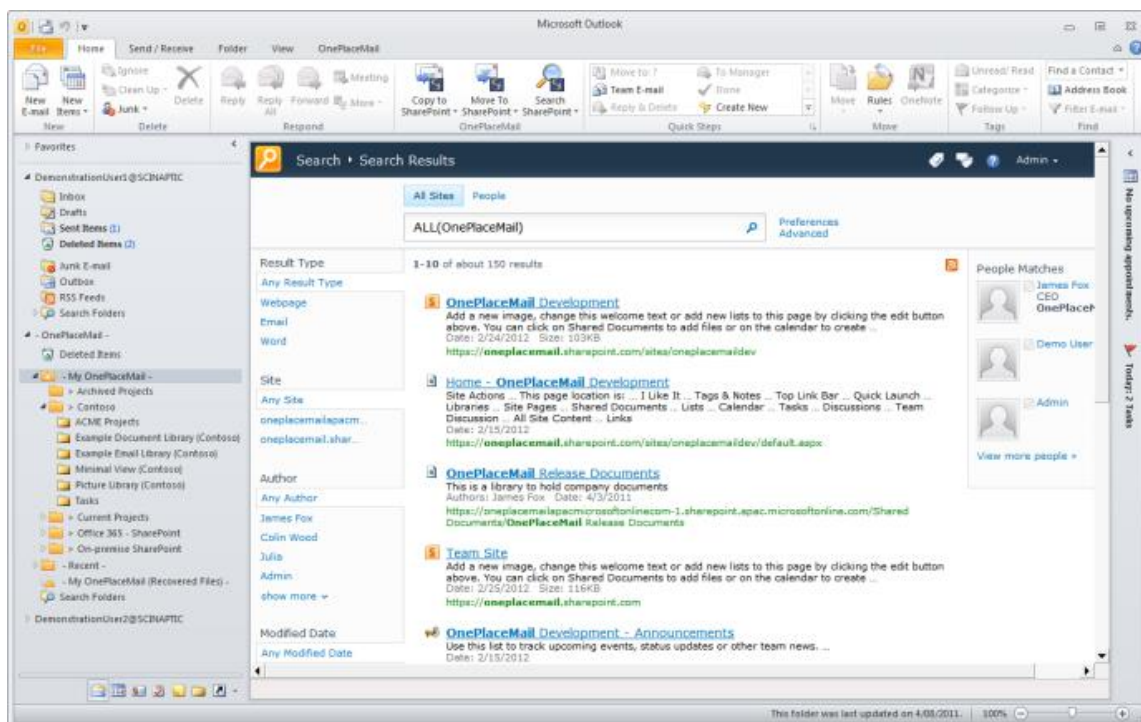
- Search automatically captured email metadata
- Search any other metadata (item columns)
- Search content
- Search email body content
- Search email attachments

NOTE: In order to search email body content and associated attachments the appropriate IFilters must be installed on the SharePoint server. Please see your administrator for help (further information about the IFilters can be found in the Administrator Guide).



Select search location/scope within Microsoft Outlook and perform search

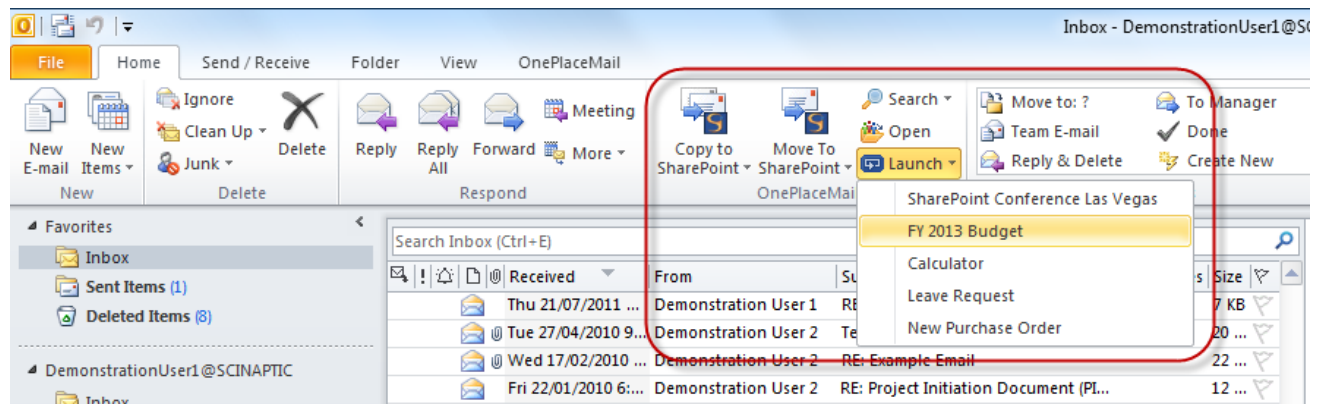
The search results are provided within the Microsoft Outlook interface where you have full access to the rich capabilities of search provided by SharePoint/Fast Search.



SharePoint Search Results – Access to search capabilities within Microsoft Outlook

Launch and Access SharePoint from within Outlook

The Launch button allows you to add one or more favorite web pages, links to files and applications. These items are conveniently available to launch/access from within Microsoft Outlook.



Launch Locations

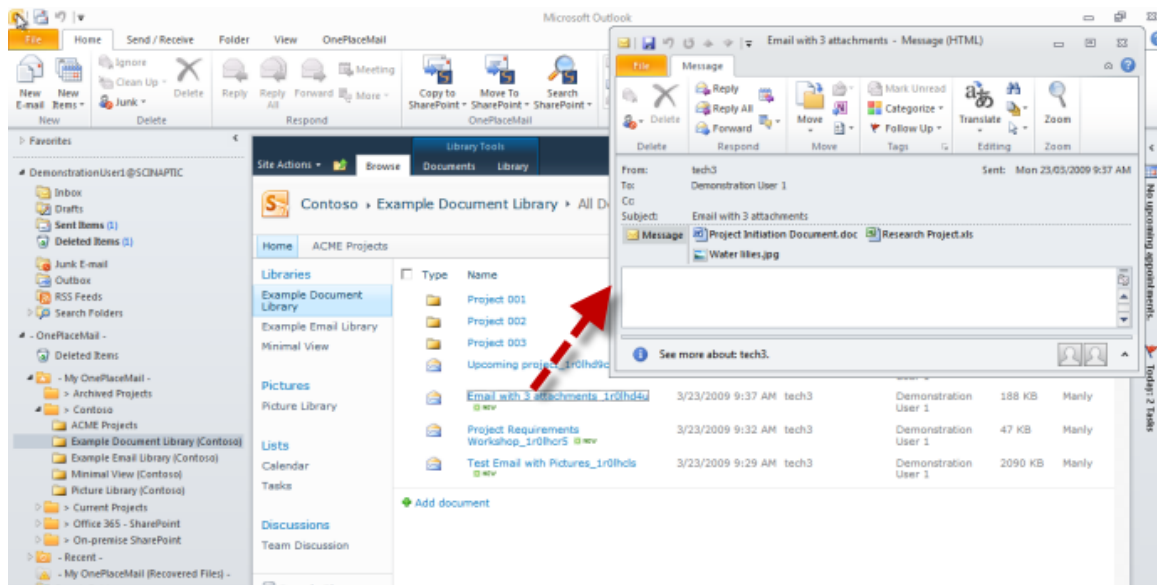
The launch locations can be defined by your administrator and deployed to Microsoft Outlook or you can define the locations personally using the OnePlaceMail – Settings – Launch window.

1.31 Access SharePoint content from within Outlook

1.31.1 View items transferred to a Library

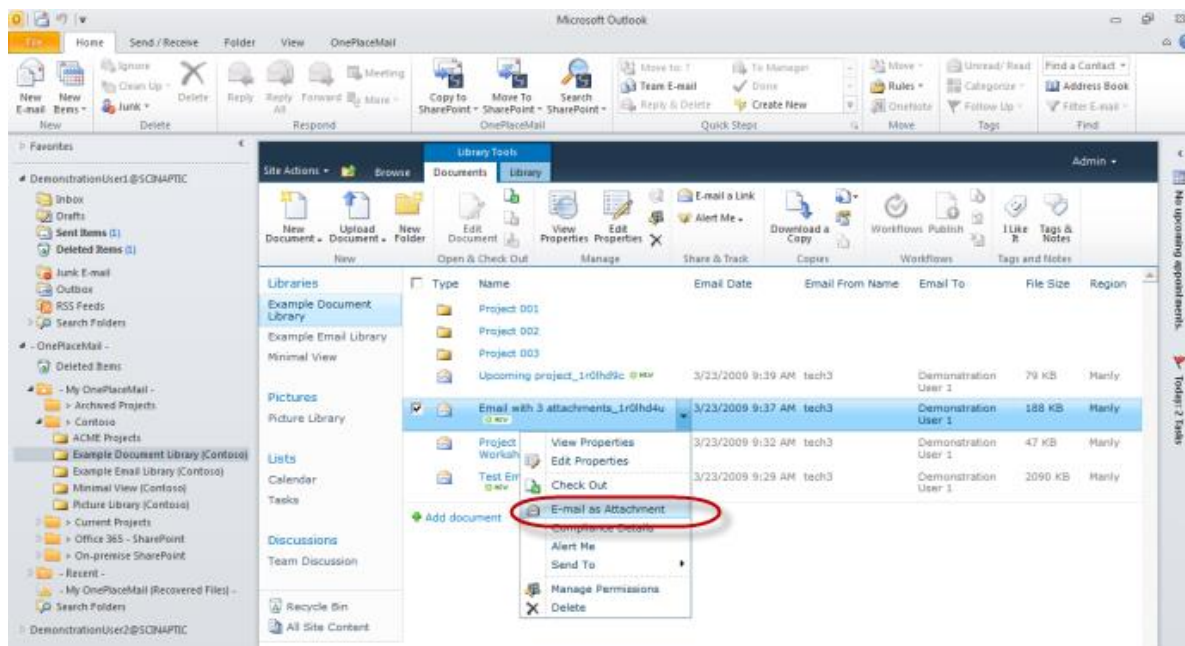
Simply select the appropriate folder within the My OnePlaceMail area to view the content of the SharePoint location. This provides full access to the capabilities offered by SharePoint, all from within the Microsoft Outlook interface.

The screenshot below shows accessing SharePoint from Outlook and opening an email.



Open email message from SharePoint (without leaving Outlook)

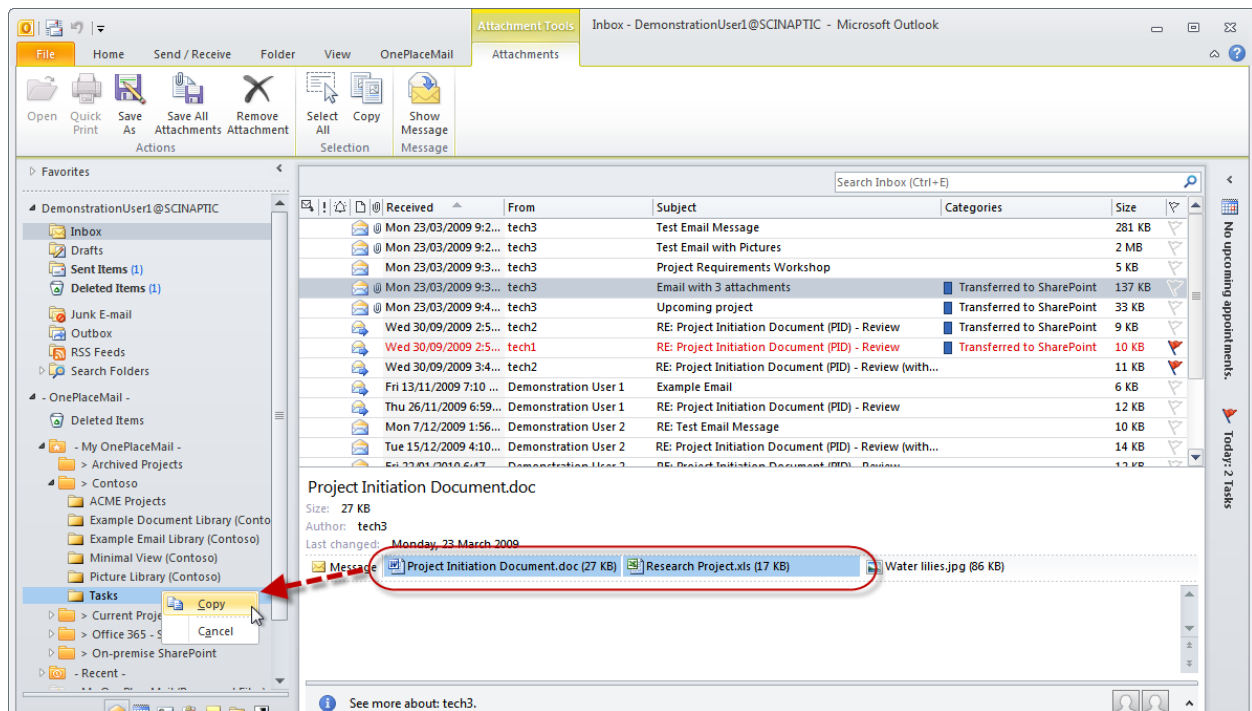
The screenshot below shows selecting an item and using the 'Email as Attachment' function provided by OnePlaceMail.



Select 'Email as Attachment' when sending an external email

1.31.2 View items transferred to a List

OnePlaceMail support transferring content to SharePoint Lists. The screenshot below shows dragging/dropping two email attachments to a SharePoint Tasks List. Email messages can also be transferred to SharePoint lists in the same manner.



Drag & drop one or more email attachments

In the example above, the list is a Task list, but you could also transfer items to Announcements, Issues, Calendar, Contacts or Custom lists.

The Save to SharePoint window will appear to enable the completion of metadata in the SharePoint List.

OnePlaceMail - Save to SharePoint

Location **Tasks**

Properties Location Content

Content Type Task

☒ Use Email Subject/Filename as Title value

Title * [Auto Set]

Predecessors <<type to search>>

Priority (2) Normal

Status Not Started

% Complete %

Assigned To

Description

Start Date 25/02/2012

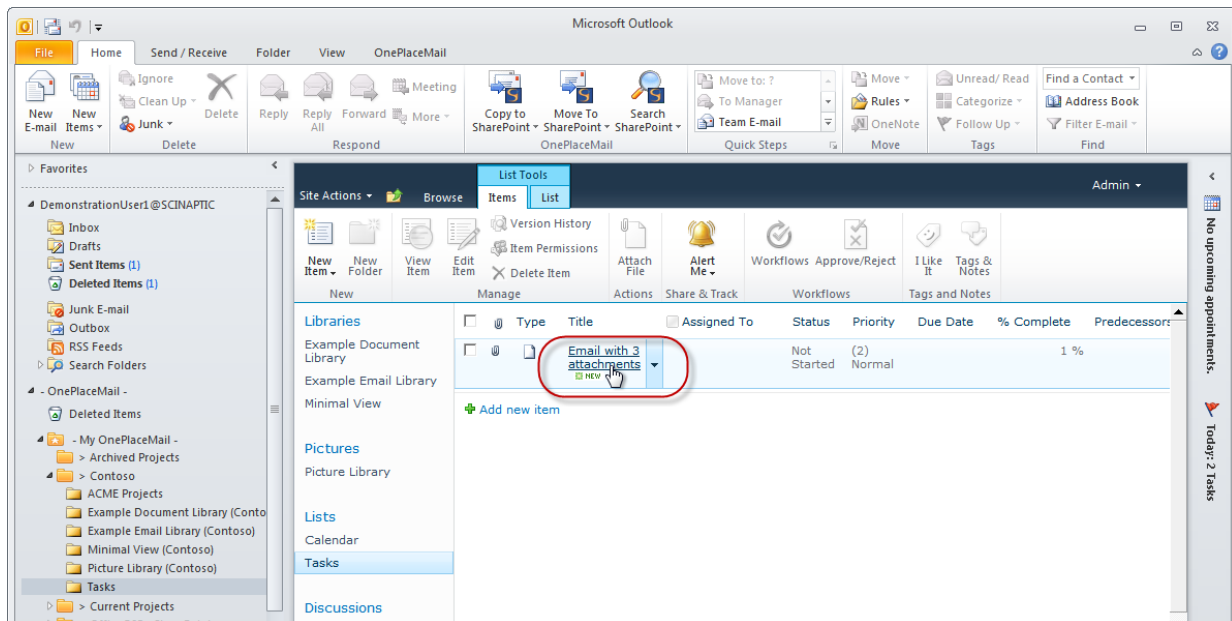
Due Date

Files Project Initiation Document.doc (23.5 KB); Research Project.xls (13.5 KB) [Manage Files](#)

Scinaptic OnePlaceMail® Save Cancel

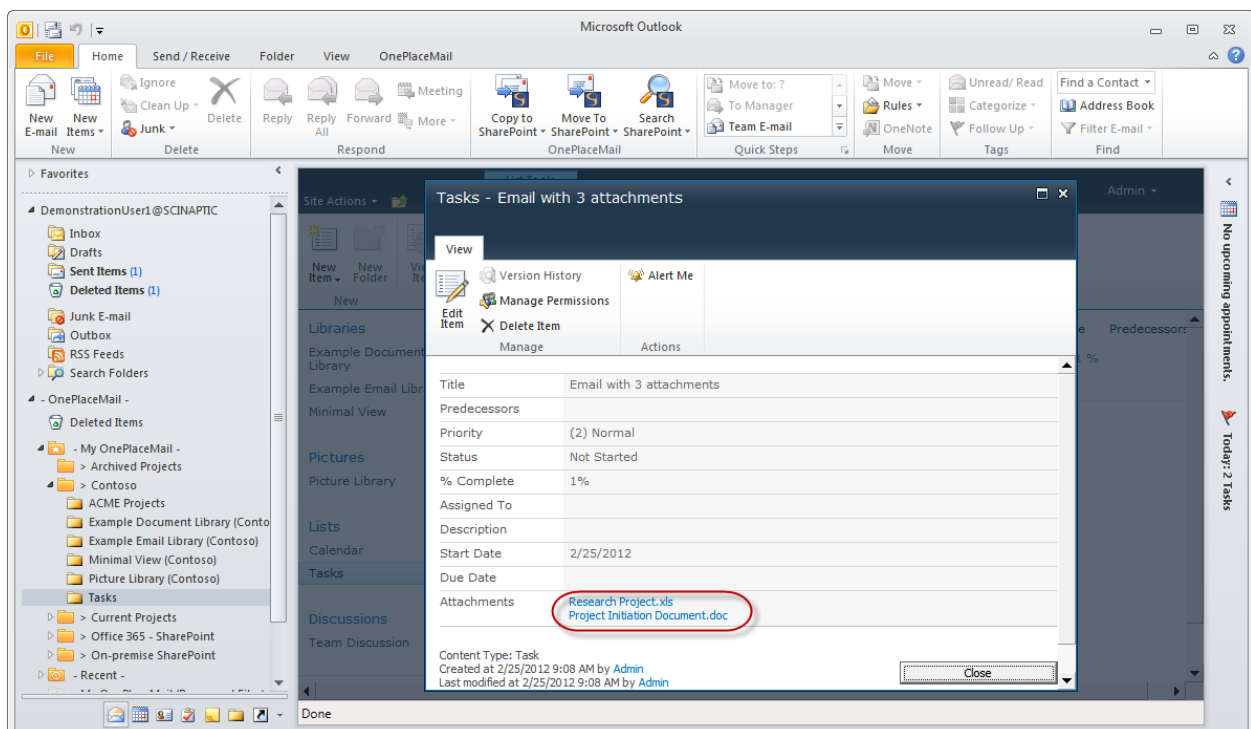
Complete SharePoint List Metadata

To view the Task item containing the two attachments, simply click on the item in SharePoint. The list item opens and you see the **Attachments**.



New List Item containing multiple attachments

The screenshot below shows how the attachments are displayed if you have transferred them into a SharePoint list. In this example, we are showing the creation of a new Task list item containing the 2 attachments.

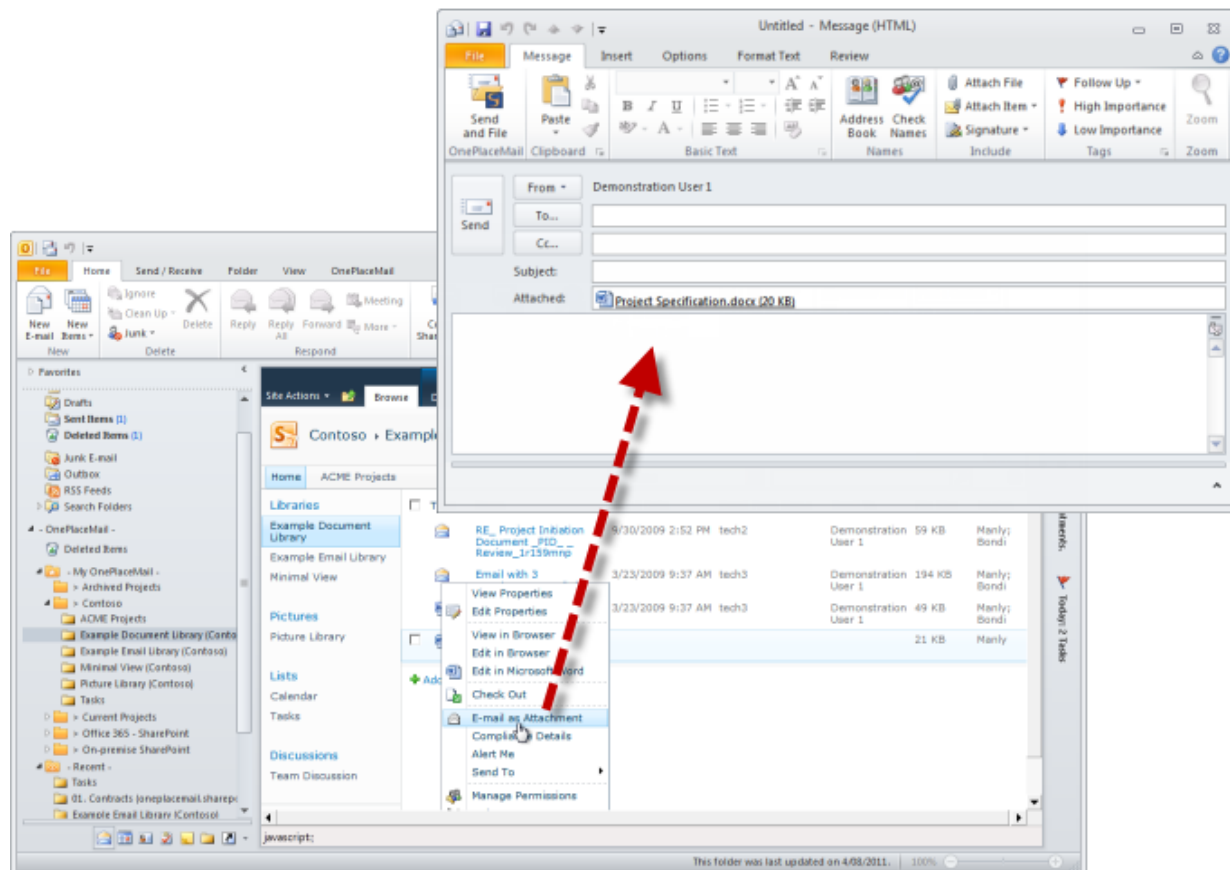


View attachments

1.32 Send SharePoint Item as Attachment

1.32.1 Email as Attachment

You can select a SharePoint location from within Outlook (or within SharePoint) using the folders in the My OnePlaceMail area and locate an item within the view. The drop-down menu is available to perform extended functions such as attaching the item to a new email message.



Email as Attachment (for sending emails to external recipients)

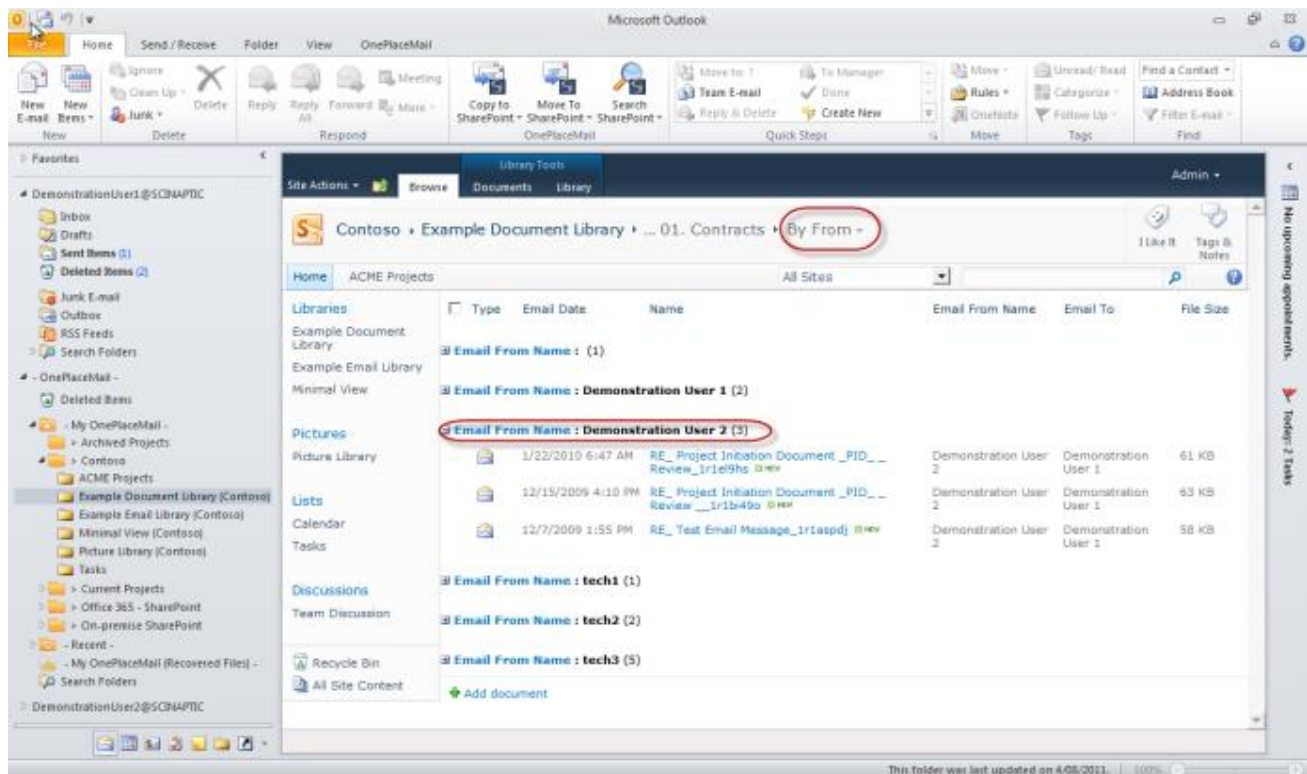
This is useful if you require the ability to conveniently send a file from SharePoint to an external recipient. For internal emails, it is recommended you use the 'Send To – Email as a link' capability provided by SharePoint.

1.33 The Power of Metadata - Views, Search & Find

1.33.1 Email Attributes and SharePoint Views

OnePlaceMail automatically captures email attributes at the point of saving to SharePoint. Email attributes are captured both when transferring email messages or transferring specific email attachments separately from the email. Furthermore, the user can complete additional filing information in the save to SharePoint window if required.

Capturing both email attributes and additional filing information enables the creation of sophisticated views and search capabilities in SharePoint. The power of SharePoint, including the library views and search capabilities are made available directly within Outlook via OnePlaceMail.



Email Attributes in SharePoint Views

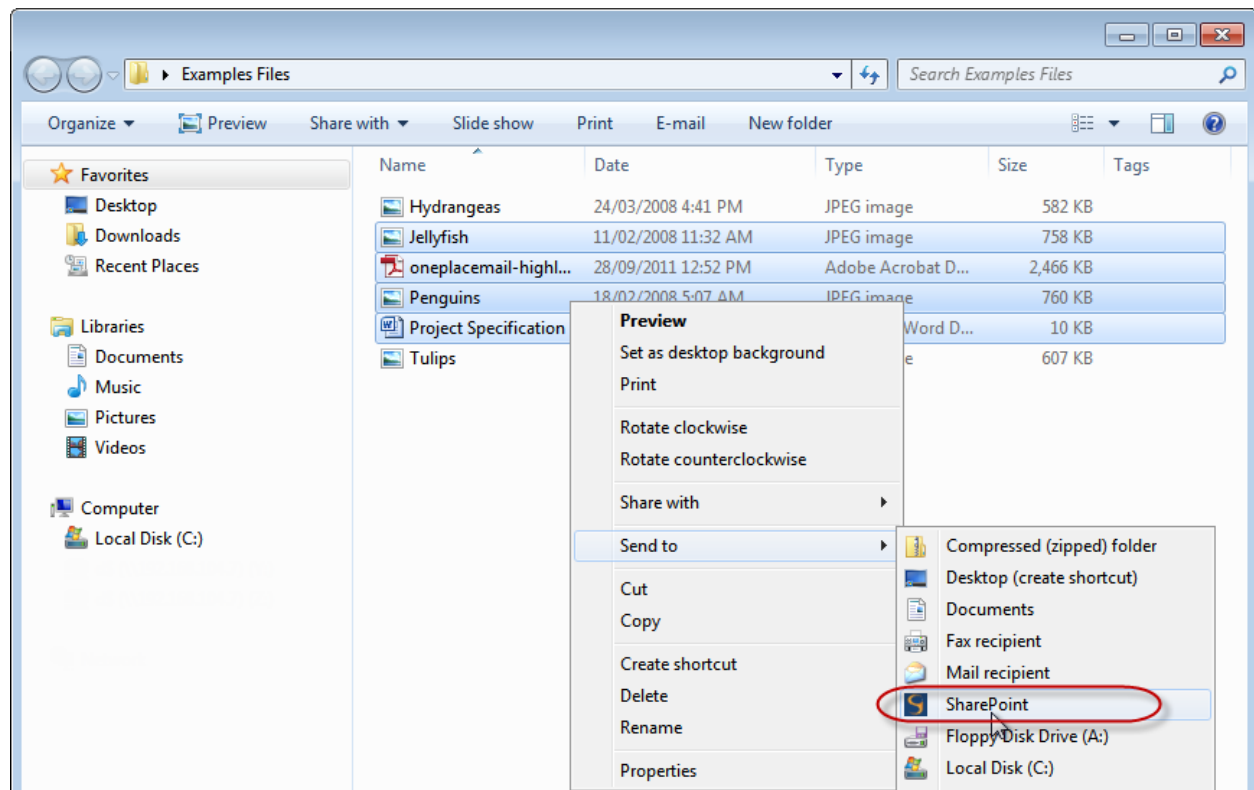
Tip: You can create views at the folder level or create views that aggregate information across folders.

Windows Explorer to SharePoint

OnePlaceMail provides Windows desktop integration from the Windows Right-Click Send To menu. Therefore, you can save files from your desktop, personal folders or network drives directly to SharePoint.

Perform the following steps to save files from your desktop, personal folders or network drives to SharePoint using OnePlaceMail:

- 1) Select the file(s) you wish to save to SharePoint
- 2) Right-click and click **Send To** and click **SharePoint**
- 3) The Save to SharePoint window will open to complete additional filing information



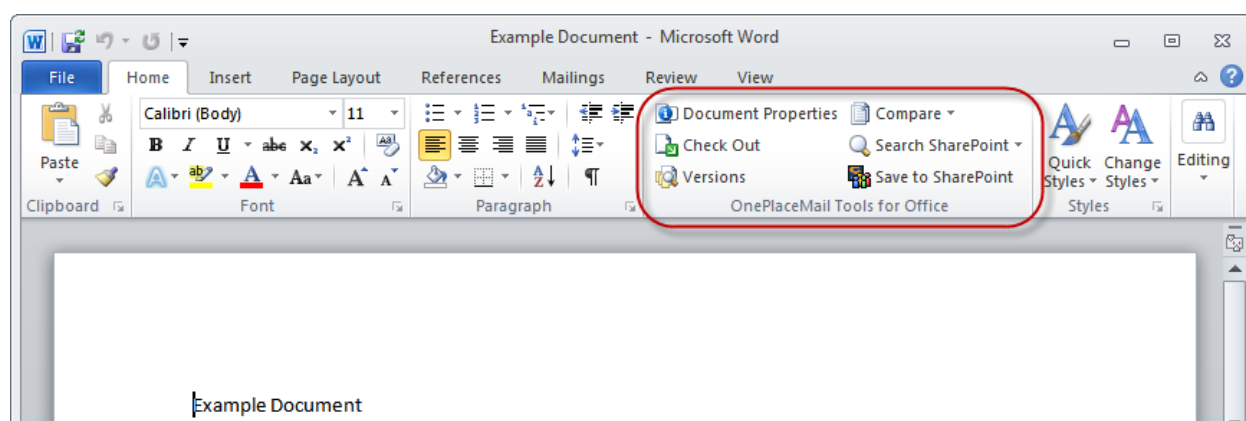
Save files from Windows Explorer

OFFICE (Word, Excel, PowerPoint) TO SHAREPOINT

Scinaptic OnePlaceMail™ Productivity Tools for Office (OnePlaceMail Enterprise Edition only) is an add-on to Scinaptic OnePlaceMail™ and extends the integration features of Scinaptic OnePlaceMail™ into the following Microsoft Office applications:

1.34 Office 2010 & 2007

Feature	Word	Excel	PowerPoint
Save to SharePoint / Office 365 using OnePlaceMail	Yes	Yes	Yes
Launch your SharePoint Search Site Location/Scope	Yes	Yes	Yes
Perform SharePoint Document Management Functions <i>New ribbon group on the Home Ribbon tab providing Check In, Check Out, Discard Check Out, File Properties (Document Information Panel)</i>	Yes	Yes	Yes
Compare SharePoint Document Versions <i>Visually compare versions showing all differences between two documents</i>	Yes	-	-



OnePlaceMail Tools for Office Ribbon Group 2010

OnePlaceMail™ Productivity Tools for Office appear as a new group in the Office 2010/2007 ribbon as shown below.

1.35 Office 2003

Feature	Word	Excel	PowerPoint
Save to SharePoint using OnePlaceMail	Yes	Yes	Yes

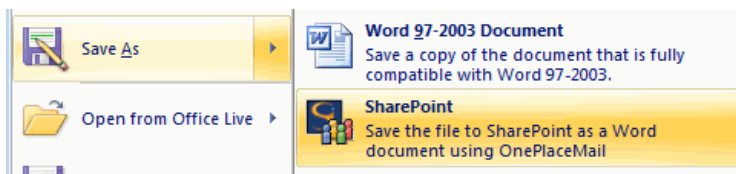
1.36 Save to SharePoint from Word, Excel and PowerPoint

The Save to SharePoint button allows you to take a copy of the current file and transfer it to SharePoint using the OnePlaceMail Save to SharePoint Window to select a destination location in SharePoint and optionally specify any metadata (SharePoint columns).

Once the file has been transferred the application will then reopen the file stored in SharePoint and you can now continue working on the file and subsequent changes will be saved to SharePoint.

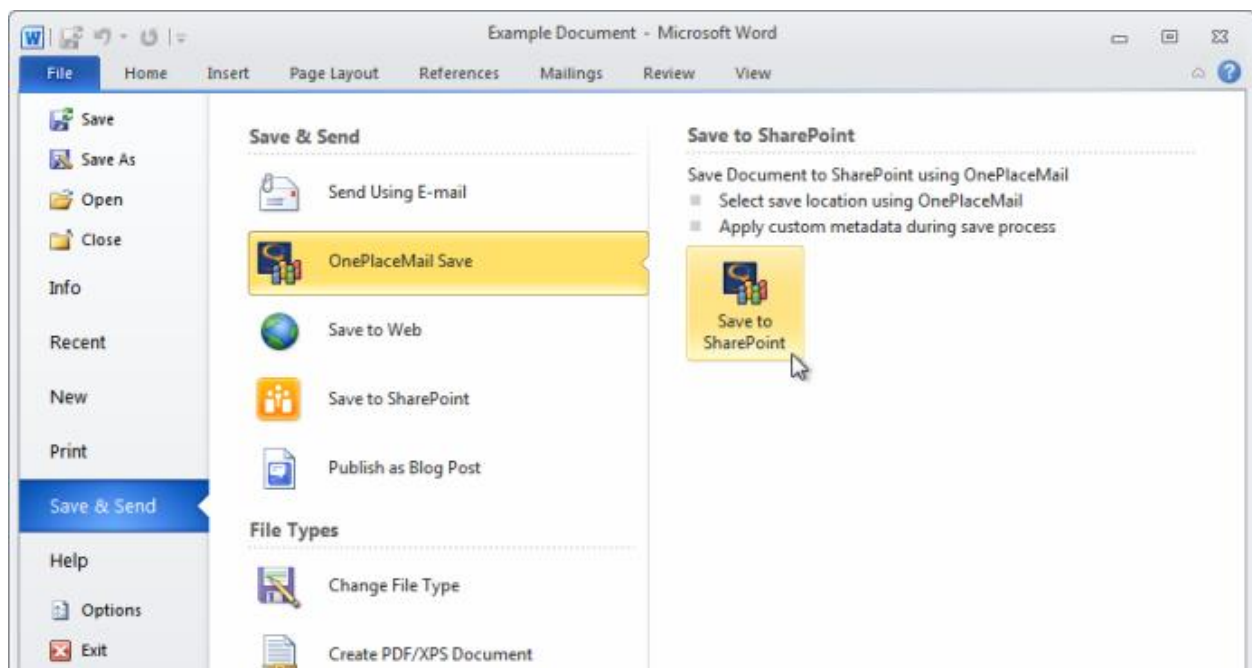
Once the file has been transferred to SharePoint you will notice that other buttons become available in the OnePlaceMail Tools for Office group related to document management (such as check in, checkout, discard checkout, and versions).

The same Save to SharePoint action is also available from the Office > Save As menu in Office 2007.



Office > Save As > SharePoint

In Microsoft Office 2010 a new Action has been added to the 'Backstage' area of Word, Excel and PowerPoint under the 'Save and Send' tab called 'OnePlaceMail Upload' as below:

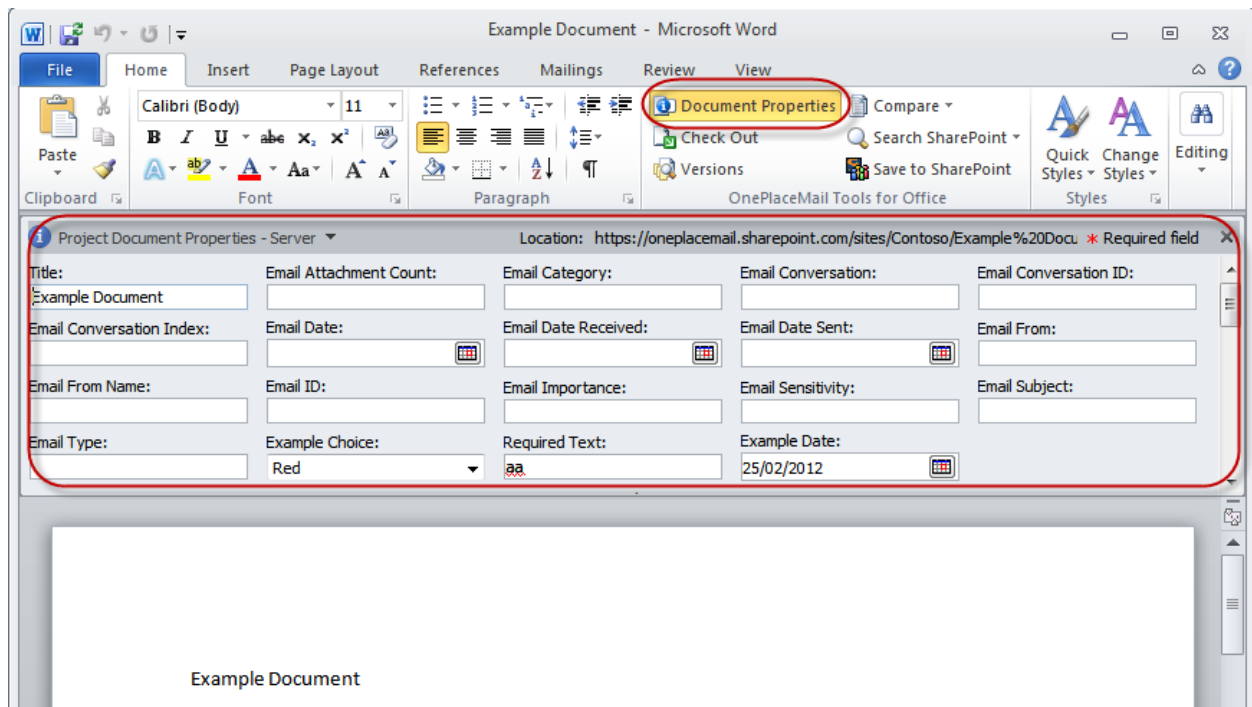


Save to SharePoint from Word, Excel and PowerPoint

1.37 Perform SharePoint Document Management Functions

When working with a file that is stored in SharePoint the OnePlaceMail Tools for Office ribbon group provides functions related to document management (such as document properties, check in, checkout, discard checkout, and versions).

Document Properties



Document Properties (Document Information Panel)

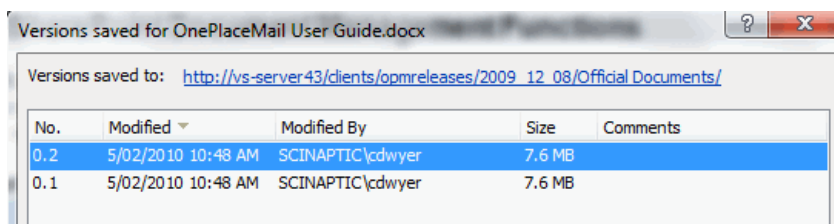
The Document Properties button toggles the document information panel (DIP) on and off. This represents the metadata (SharePoint column) values associated with this document.

When editing a document, these property values can be set directly in the document information panel within the Office application.

Check In, Check Out, Discard Check Out

The functionality provided by the check in/check out buttons will vary according to the SharePoint document library settings. Usually, you will need to check in a document after making changes so that other users can see you changes. Use check out to lock a document for editing so that other users cannot edit the same document while you are editing it.

Versions

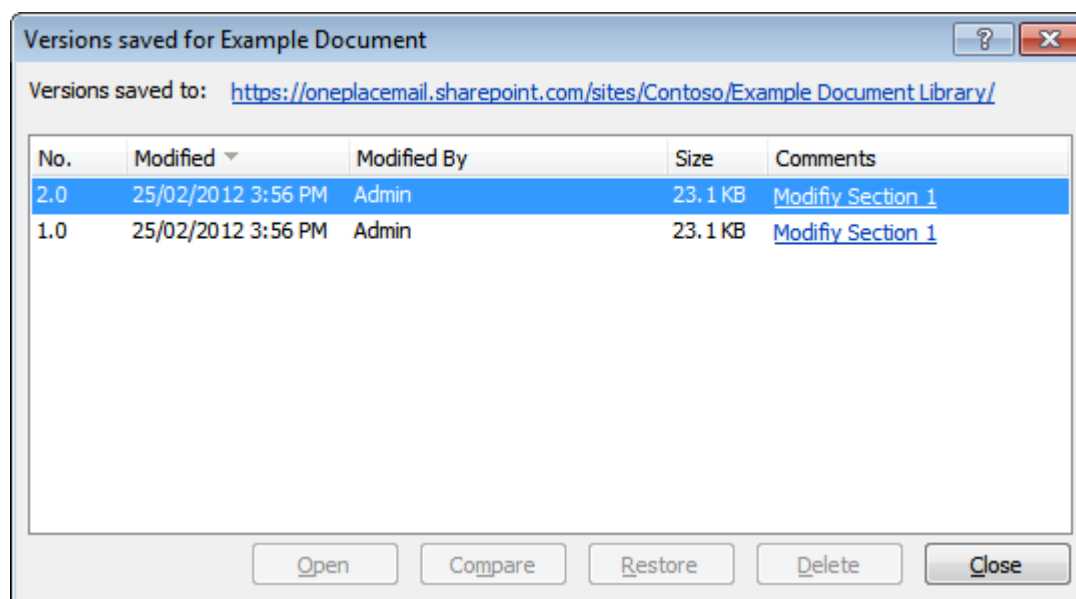


Office Versions window

The Versions button allows you to see all versions (and drafts) of this document that are stored in SharePoint.

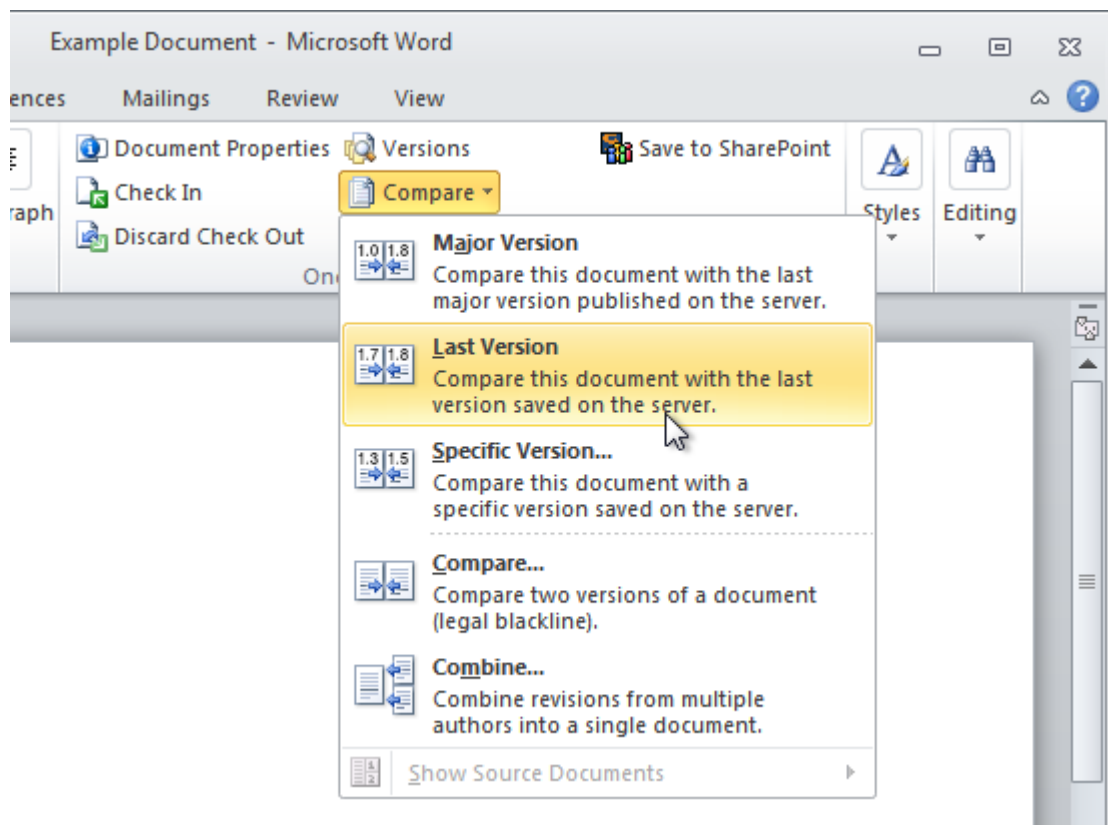
When selecting a particular version of a document in this dialog you can perform additional action including:

- Open - opens the selected version of the document in the Office application.
- Compare - opens both the current version of the document and the selected version of the document inside the Office application and analyses any differences between the two versions of the document. Note compare is only available in Word 2007.
- Restore - replaces the content of the currently checked out file with the content from the selected version.
- Delete - deletes a specific version of the document from SharePoint.



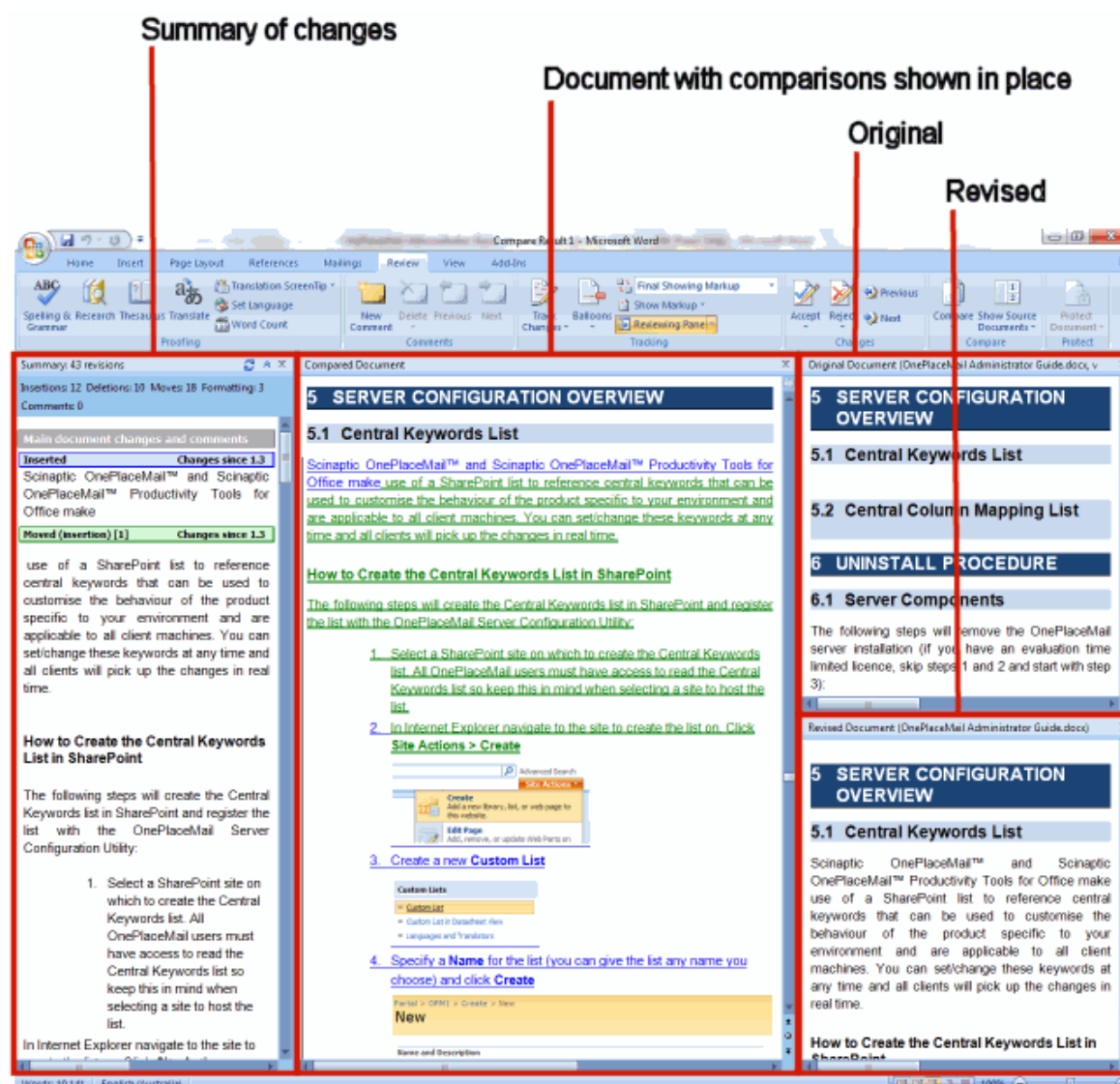
Versions window and available actions

1.38 Compare SharePoint Document Versions



From Microsoft Word - Compare Versions of documents stored in SharePoint

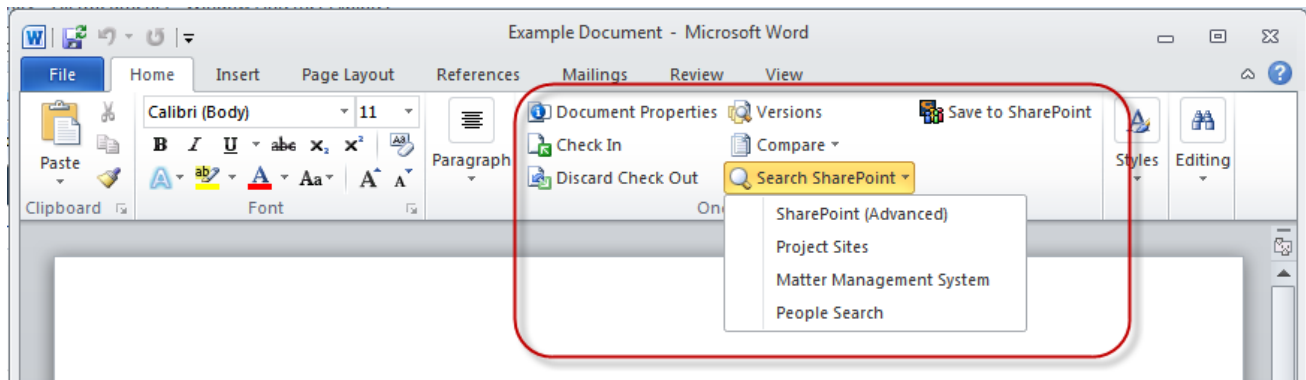
The compare menu allows you to compare the current document with another version of the same document and quickly identify all differences between the two documents.



Document Compare capability available in Word 2007 & 2010 (2007 Word image)

1.39 Search SharePoint Locations from Microsoft Office

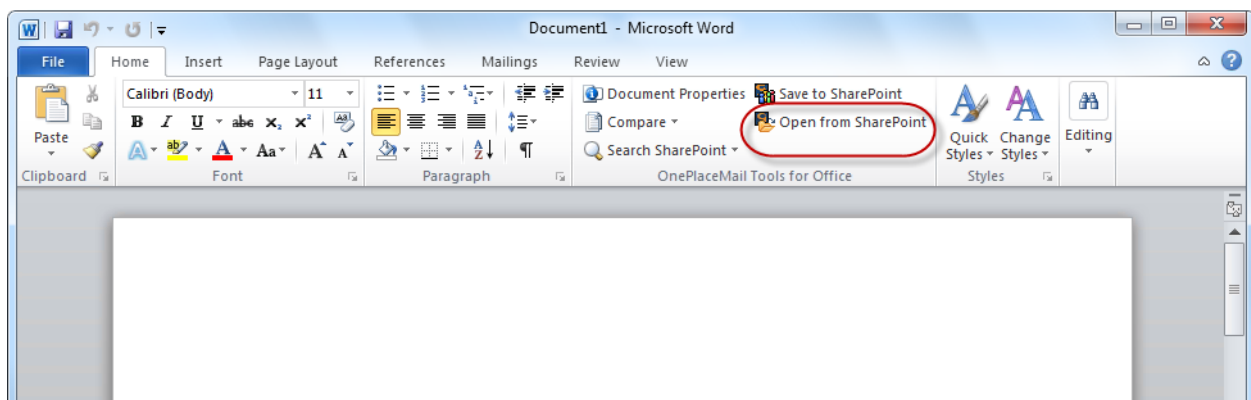
The Search SharePoint button will launch your SharePoint search site in a new browser window.



Search SharePoint - Office 2010 & 2007

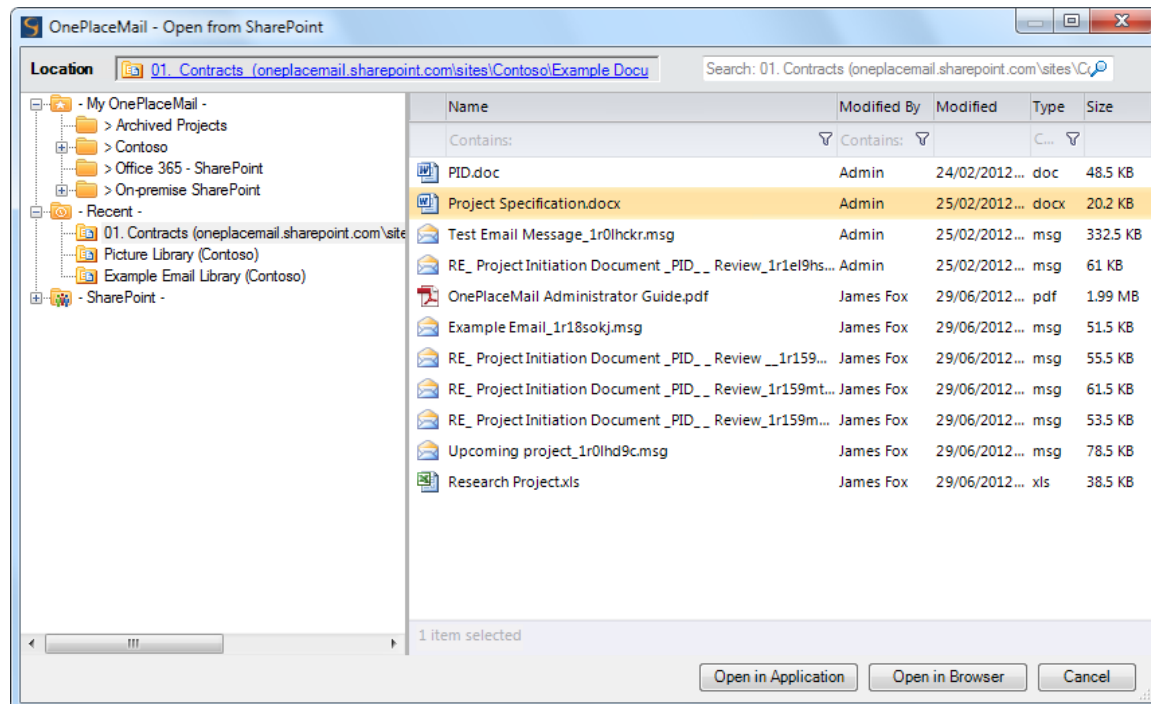
1.40 Open from SharePoint

From within Word, Excel, PowerPoint and Outlook, you can open a document from SharePoint to view/edit within the native desktop application.



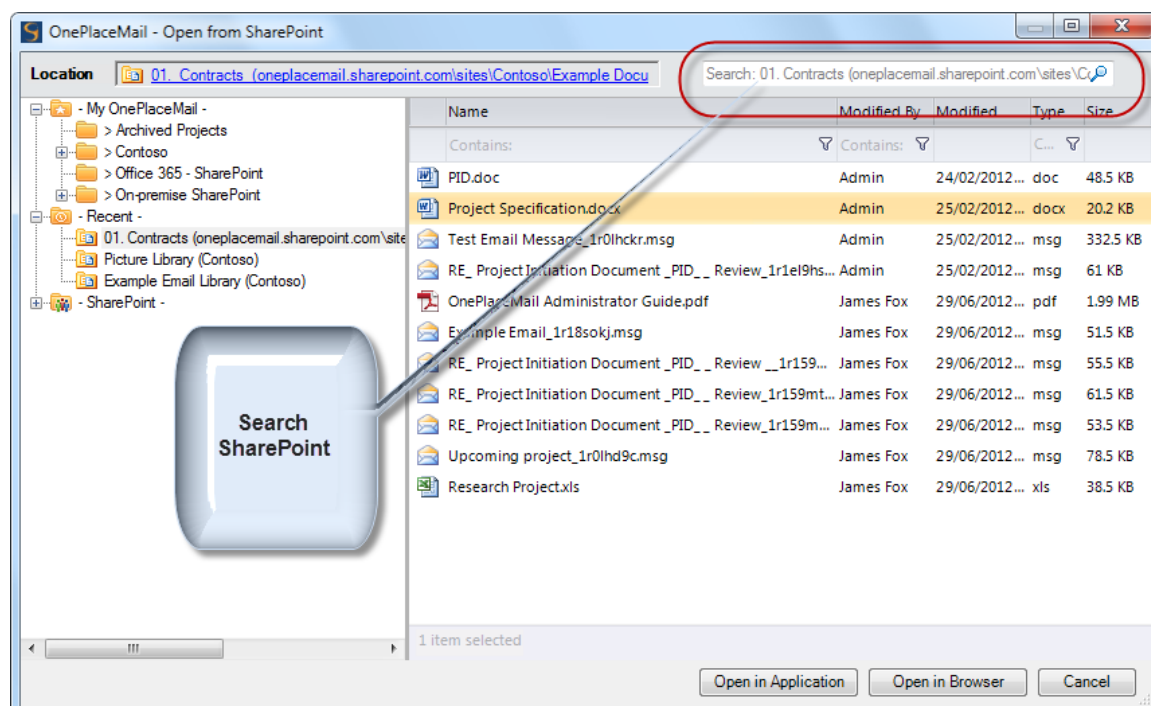
Open from SharePoint - Office 2010 & 2007

The Open from SharePoint window provides the ability to browse SharePoint recent locations, favorite locations or your entire (security trimmed) SharePoint environment.



Browse and open from Recent or Favorite locations

You also have the option (as per the Insert from SharePoint) to search SharePoint (metadata and file content) using the SharePoint Search



Search and Open from SharePoint

SharePoint Site Mailboxes (2013 Only)

OnePlaceMail extends SharePoint Site Mailboxes to help overcome many of their limitations (see [White Paper](#)). Site Mailboxes are only available to Outlook 2013 clients when saving to SharePoint/Exchange 2013 environments. The SharePoint 2013 Site must be extended with the Site Mailbox App.

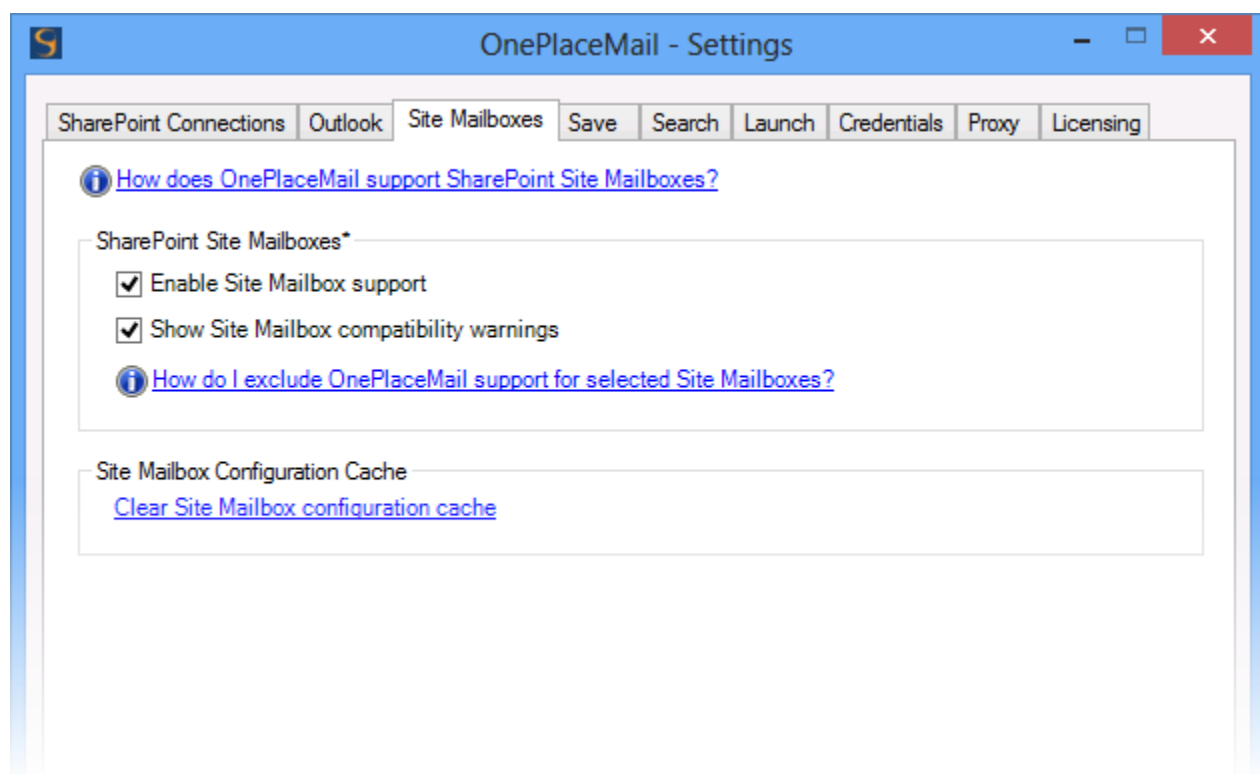
The following short videos demonstrate how Site Mailboxes are being extended with OnePlaceMail:

1. How do I capture email attributes when saving to SharePoint Site Mailboxes
2. How do I save to SharePoint Site Mailboxes from Windows File Explorer and Office
3. How do I tag content with custom metadata when saving to SharePoint Site Mailboxes
4. How do I manage email attachments with Site Mailboxes
5. How do I access SharePoint from with Outlook Site Mailboxes

Watch Videos: <http://www.scinaptic.com/sharepoint-2013-site-mailboxes.html>

1.41 Settings

The 'OnePlaceMail – Settings' window allows you to configure how OnePlaceMail interacts with SharePoint Site Mailboxes made available within an Outlook 2013 client.



1.41.1 Enable Site Mailbox support

This setting will enable OnePlaceMail support for extending Site Mailboxes in the Outlook client. The Outlook client must be restarted for the setting to effect.

1.41.2 Show Site Mailbox compatibility warnings

OnePlaceMail supports extending Site Mailboxes when Outlook is running in cached mode. In the event an Outlook client is not running cached mode, OnePlaceMail can pro-actively present a compatibility warning.

This warning can be disabled from appearing.

1.41.3 How do I exclude OnePlaceMail for selected site Mailboxes?

OnePlaceMail provides the flexibility to exclude specific Site Mailboxes from being extended by OnePlaceMail during the process of saving content to a Site Mailbox.

OnePlaceMail allows you to deploy a configuration setting to specify the Site Mailboxes to include or exclude from being extended by OnePlaceMail. Please refer to the following knowledge base article for further details:

www.scinaptic.com/support/0108.html

1.41.4 Clear Site Mailbox configuration Cache

To help improve performance when interacting with SharePoint Site Mailboxes, OnePlaceMail caches some details regarding the SharePoint Site Mailbox locations.

There are scenarios when an existing Site Mailbox may be moved or renamed within SharePoint. Under this type of scenario, the Site Mailbox cache can be cleared. Therefore, allowing OnePlaceMail to reestablish the correct details for the Site Mailbox location/name.

1.42 Saving to Site Mailboxes - Controlling the process

1.42.1 Use native Site Mailbox process

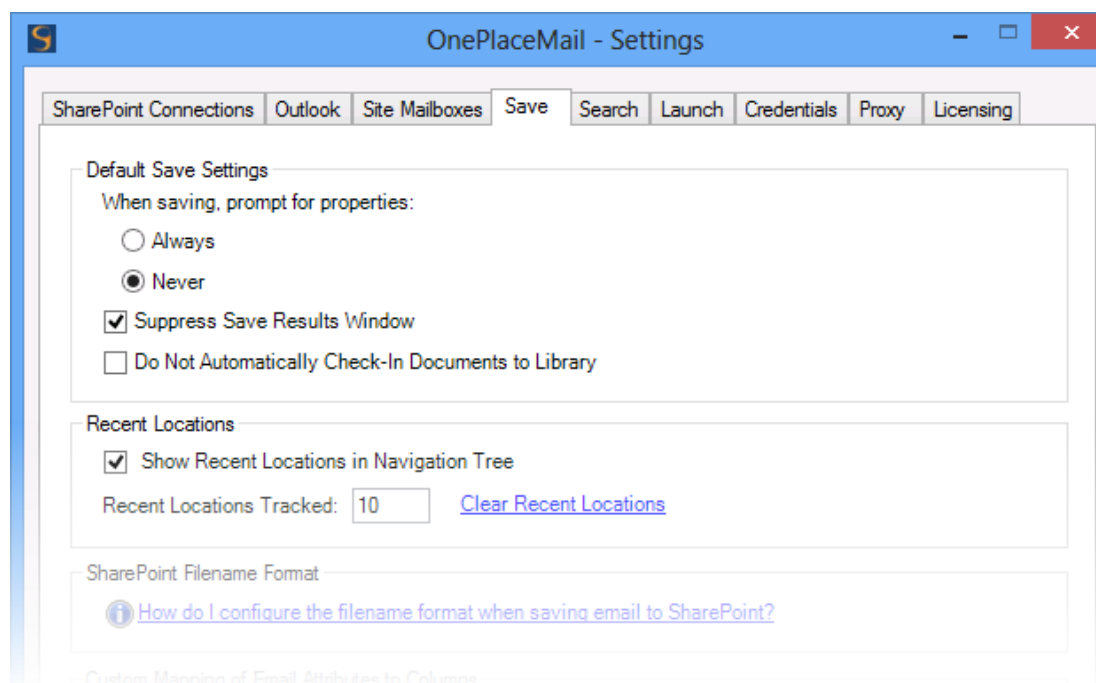
To not extend site mailboxes for the capture of email attributes or tagging with custom metadata you can exclude a Site Mailbox from being managed by OnePlaceMail. Please refer to the following knowledge base article: www.scinaptic.com/support/0108.html. Note: All libraries within the Site Mailbox will adhere to the configuration setting.

1.42.2 Use OnePlaceMail

When saving content to a SharePoint / Site Mailbox location, OnePlaceMail can optionally present the 'Save to SharePoint' window allowing the user to tag content with custom metadata.

OnePlaceMail provides the ability to define a default global setting for this behavior. The setting can also be overridden on a location by location basis when defining your favorite OnePlaceMail locations - See section '1.1.1: Manage My OnePlaceMail Folders (Favorites) in Outlook' earlier in this user guide.

Site Mailboxes reference the global setting to determine if the 'Save to SharePoint' window will appear.



Never prompt (capture email attributes)

You can suppress the 'Save to SharePoint' window from appearing by selecting 'Never' in the Default Save Settings. This will apply to all Site Mailboxes and their libraries being managed by OnePlaceMail.

Note: if a location (library/content type) in SharePoint has a required column, OnePlaceMail will present the Save to SharePoint window for the user to complete the metadata. Therefore, the system will dynamically determine if the Save to SharePoint window will appear based on the location content.

Always prompt (to tag content with custom metadata)

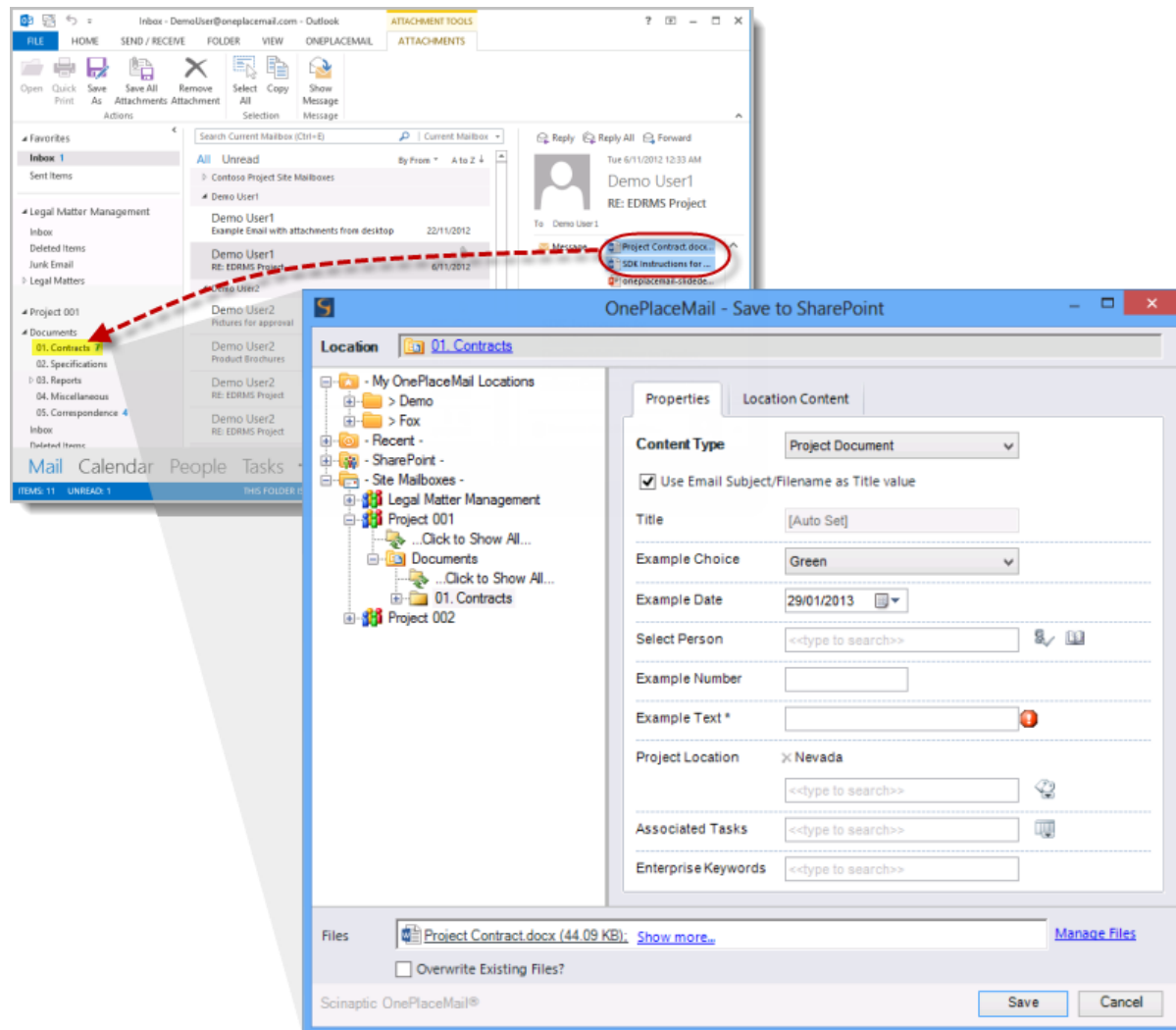
You can show the 'Save to SharePoint' window by selecting 'Always' in the Default Save Settings. This will apply to all Site Mailboxes and their libraries being managed by OnePlaceMail.

1.43 Saving to Site Mailboxes

Tag content with Custom Metadata

The screenshot below shows the ability to tag content with custom metadata (Columns) when saving to SharePoint 2013 Site Mailboxes. Email attributes are also captured automatically when saving email attachments or emails.

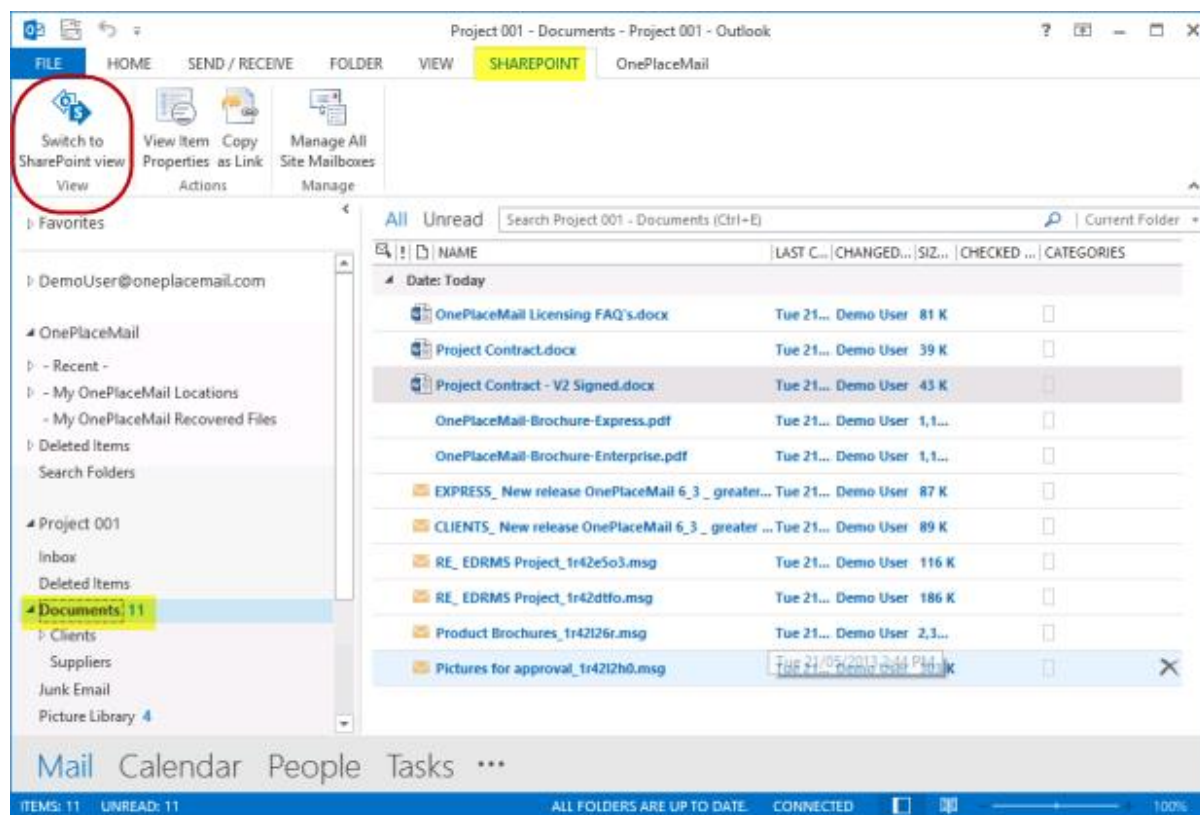
Refer to [Page 11 of the White Paper](#) for further details on tagging content when saving to SharePoint Site Mailboxes.



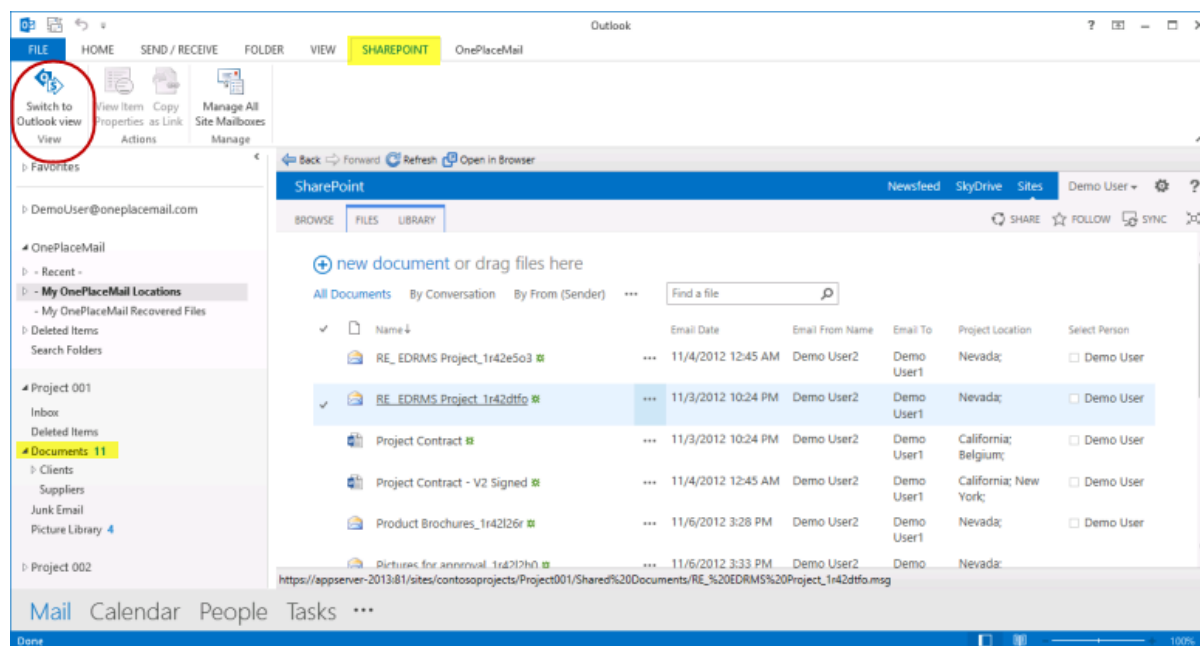
Tag content with custom metadata when saving to a Site Mailbox

Access SharePoint Document Management capabilities from Site Mailboxes

Toggle between the Exchange Style views of Site Mailboxes and the corresponding SharePoint View to access document management capabilities.



Site Mailbox – SharePoint Tab: Toggle from Exchange Style View to SharePoint View



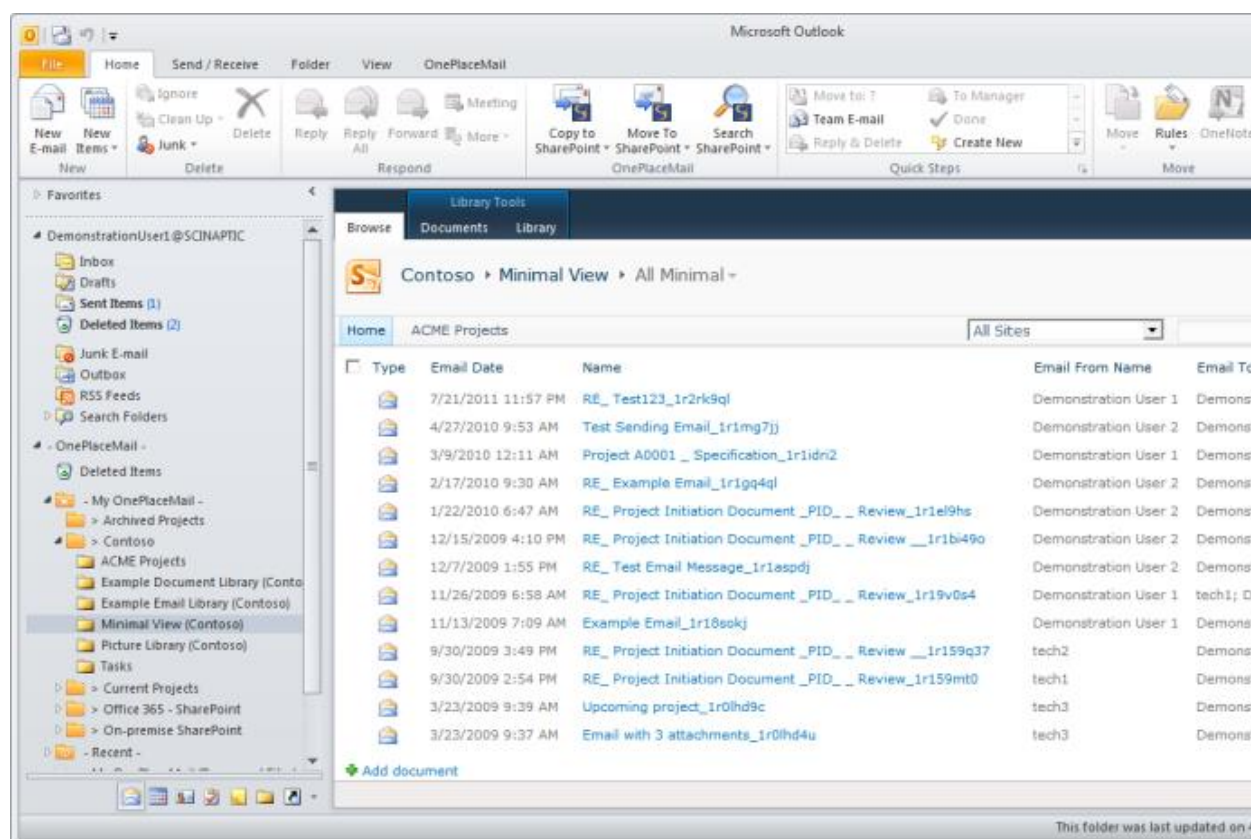
Site Mailbox – SharePoint Tab: Toggle from SharePoint View to Exchange Style View

Further configuration options

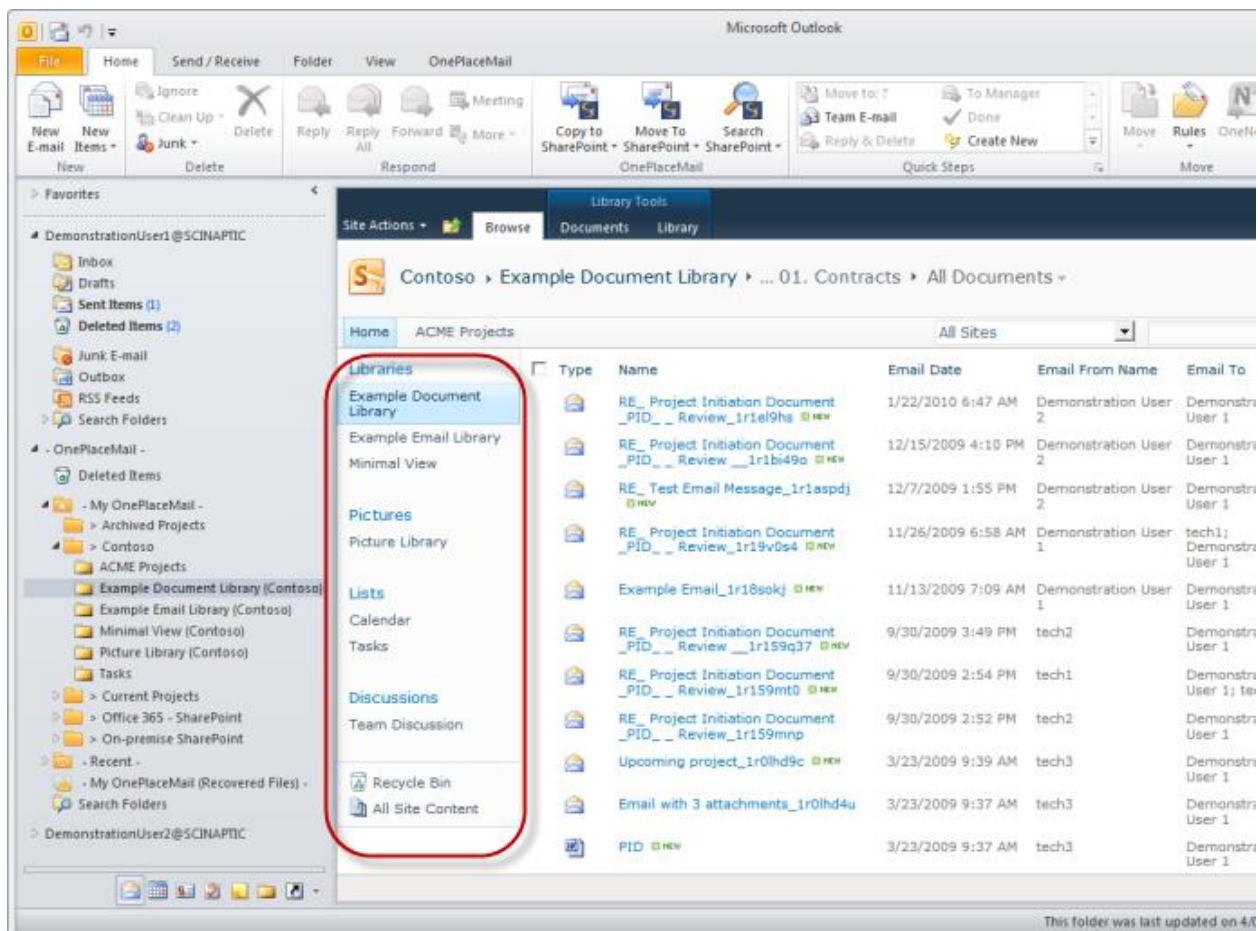
1.44 Minimal View - Standard View

OnePlaceMail provides the option to set a Minimal View for a SharePoint library. The Minimal View is a simplified view of the SharePoint library. It has the standard SharePoint navigation bars removed to help maintain focus on the library content. The Minimal View provided with OnePlaceMail can be modified (see Administrator Guide for details).

Note: Please refer to the Administrator Guide for details on how to enable the Minimal View



Minimal View showing SharePoint with no left navigation (example minimal view)



Standard View with SharePoint left navigation

1.45 Set the Folder 'My OnePlaceMail' to Configurable Homepage

The - **My OnePlaceMail** - folder can be renamed to meet your business requirements using the configuration update process (see Administrator Guide for details). For example, you may change the name to: 'My SharePoint Locations'

When the user selects the - My OnePlaceMail - folder, the OnePlaceMail website home page is presented by default. This can also be changed using the configuration update process.

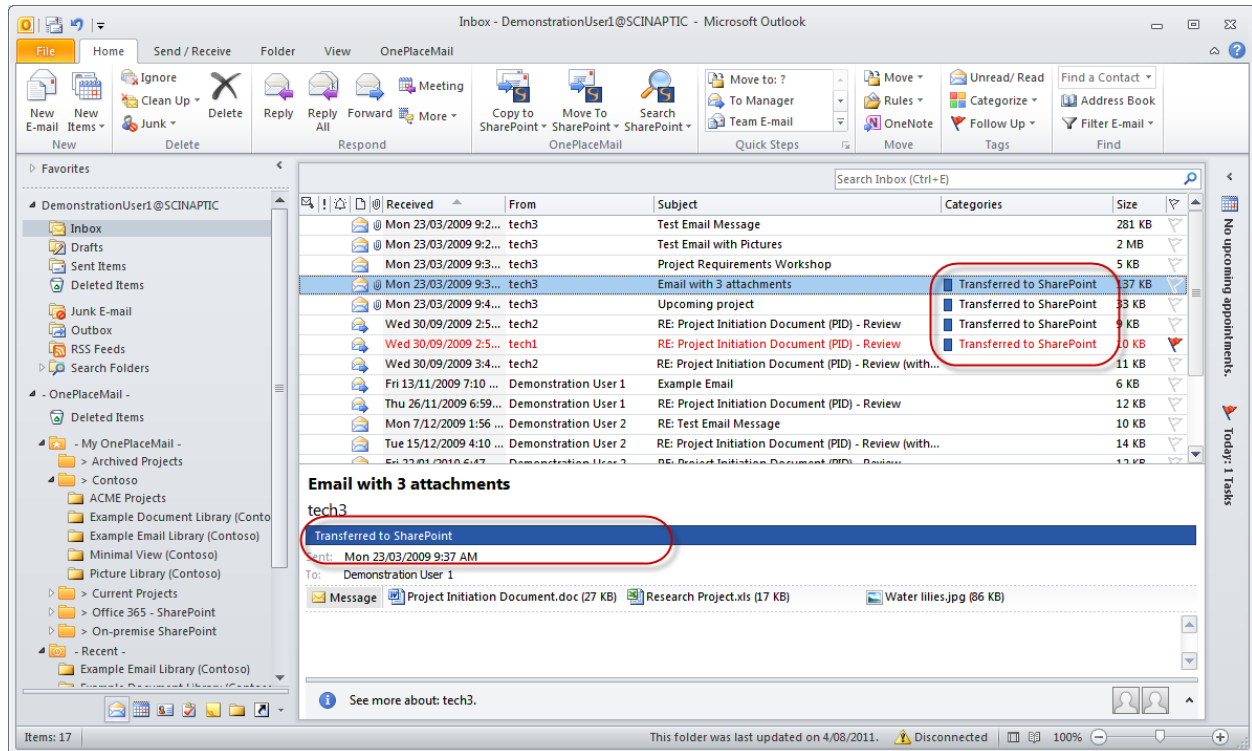
Tip: Set the URL to your Intranet home page or to your SharePoint Search page.'



My OnePlaceMail Home page is configurable

1.46 Category 'Transferred to SharePoint'

If emails are copied (you can also move) to SharePoint, an Outlook Category: **Transferred to SharePoint** is set on the email in Outlook. The category name is configurable via the configuration update process and can optionally be disabled (see Administrator Guide for details).



Outlook Category: 'Transferred to SharePoint'

1.47 OnePlaceMail Menus, Buttons and Other Configurations

OnePlaceMail is a very flexible solution and is highly configurable via the configuration update process (see Administrator Guide for details). Examples of OnePlaceMail configurations are:

- Enabling/Disabling and renaming OnePlaceMail menus and buttons
- Defining the Email filename format
- Deploying Global Settings and configurations for OnePlaceMail
- Deploying Site Collections (OnePlaceMail Enterprise Edition only)
- Deploying Outlook Folders and Category structure (OnePlaceMail Enterprise Edition only)
- Deploying Folder Settings (for Upload and post upload actions) (OnePlaceMail Enterprise Edition only)

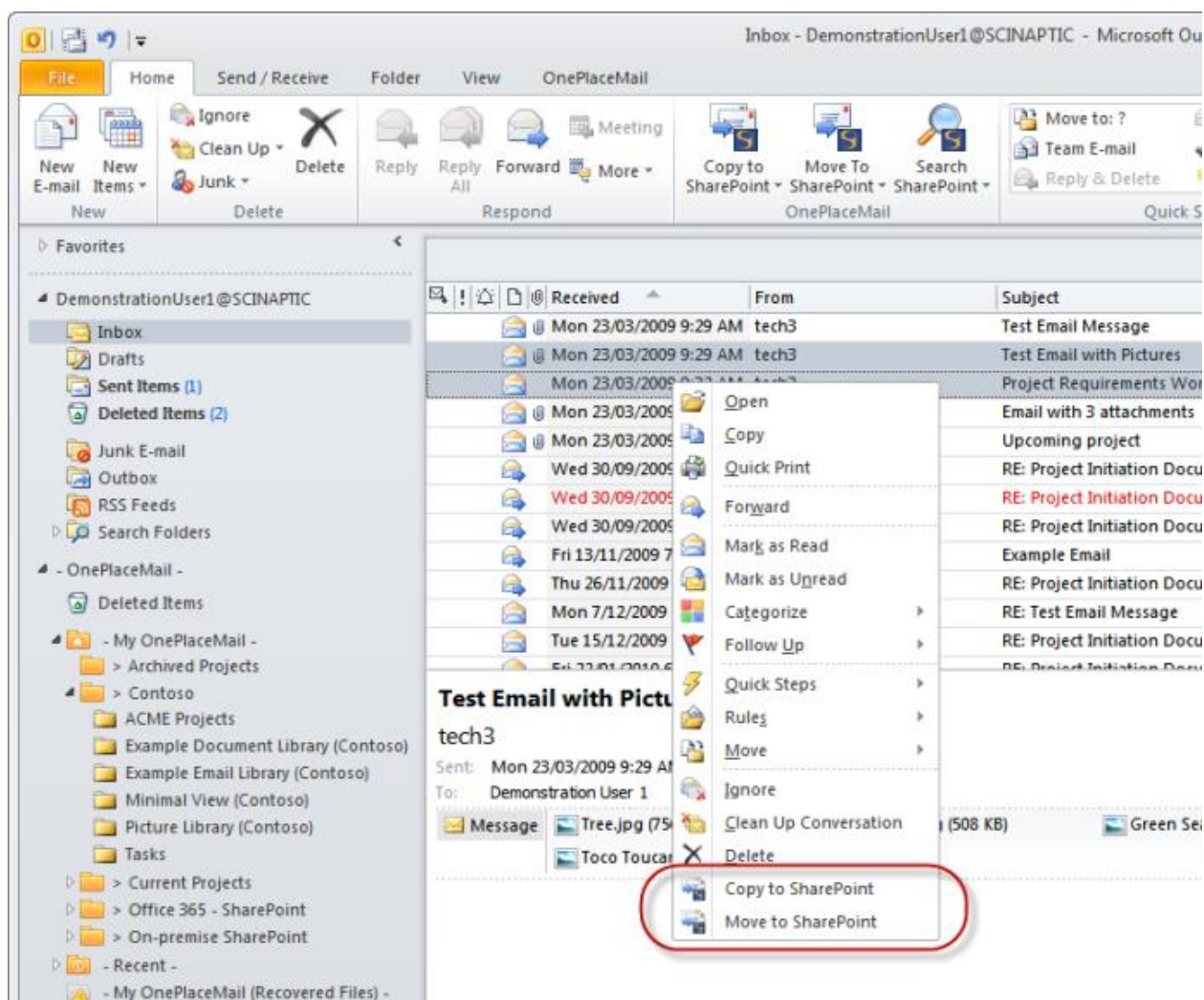
Alternate File transfer methods

In addition to drag & drop, there are other ways of transferring items from Outlook to SharePoint. Choose the one that is most convenient for you.

- Right-click on email message
- SharePoint button on the task bar
- Select OnePlaceMail from the menu bar and select Save Emails to SharePoint
- Move icon on the toolbar
- Send and file emails via OnePlaceMail
- Using Outlook Rules

1.48 Right-Click on Email Message: Move/Copy to SharePoint

Select one or more emails and Right-click to copy or copy the selected emails to SharePoint.



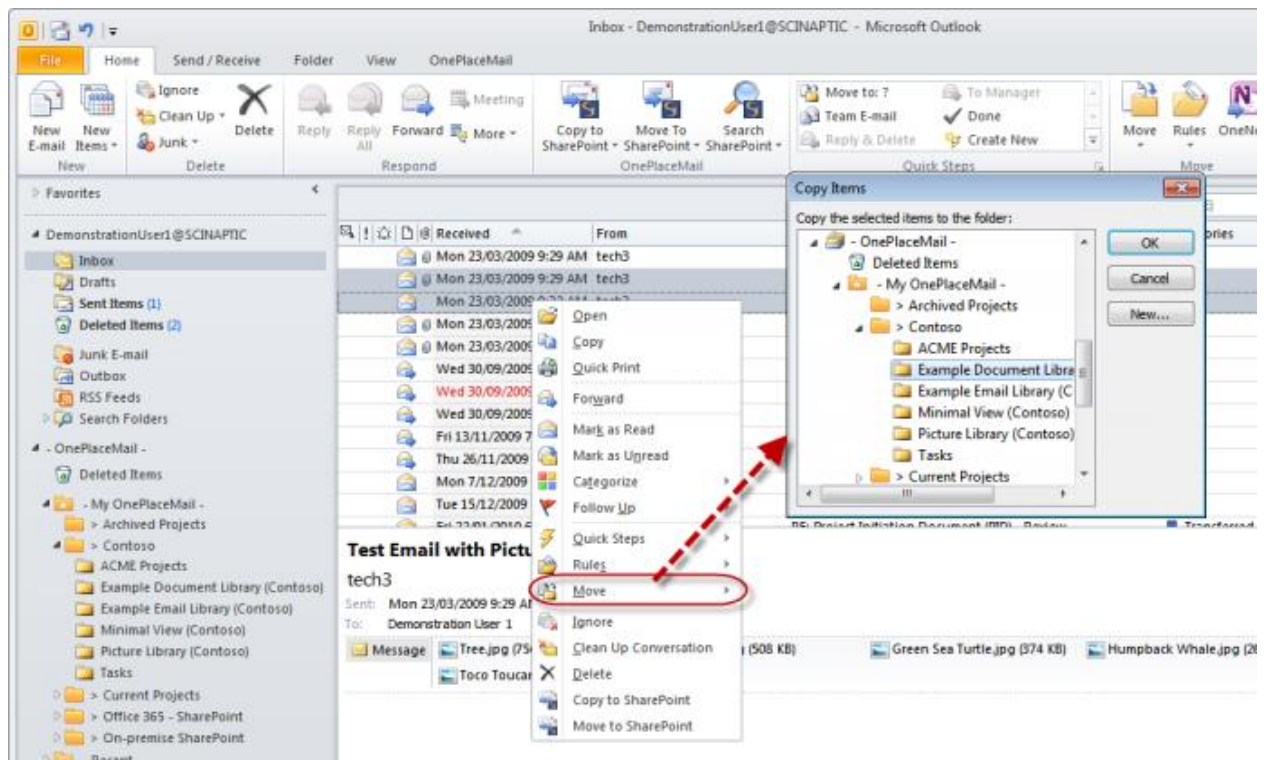
Right-click – Save to SharePoint

Note: Right Click Copy To / Move To is available in Outlook 2010 only.

1.49 Right-Click on Email Message

You can also upload an email and/or attachment by following these steps:

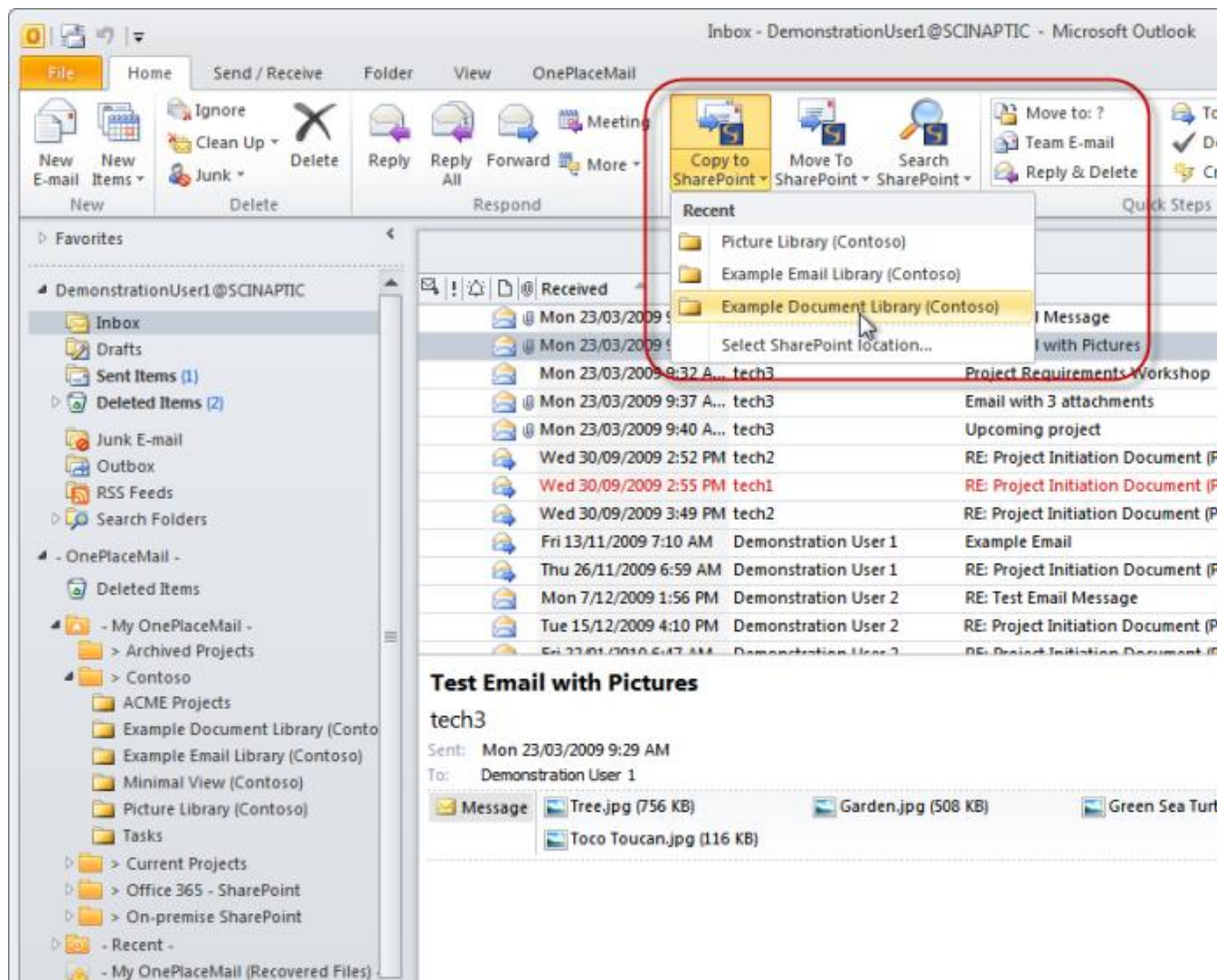
- 1) Select the email and/or attachment you wish to upload
- 2) Right-click and select **Move to Folder** from the dialog box
- 3) A dialog box will appear where you can select the destination



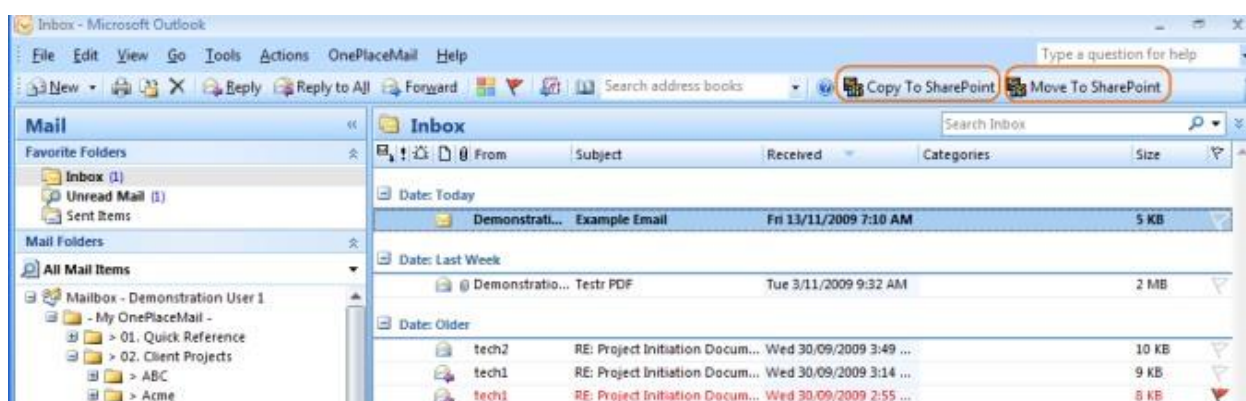
Using the standard Outlook Copy or Move

1.50 SharePoint Button on the Ribbon/Task Bar

OnePlaceMail provides a 'Copy To' and 'Move To' button on the ribbon/task bar. Simply select the emails you wish to upload to SharePoint and press the appropriate button. Either button can be renamed or hidden via the configuration options (See Administrator Guide).



Microsoft Outlook – Copy/Move/Search



Microsoft Outlook 2007, 2003

OnePlaceMail Settings

1.51 OnePlaceMail Settings

OnePlaceMail preferences can be set in the 'OnePlaceMail – Settings' dialog box.

1.51.1 My SharePoint Tab

The screenshot shows the 'OnePlaceMail - Settings' dialog box with the 'My SharePoint' tab selected. The dialog has a blue title bar and a tabbed interface. The 'My SharePoint' tab is active, showing settings for recent locations, location search, and location filtering. The 'Recent Locations' section has a checked checkbox for 'Show Recent Locations in Navigation Tree', a text box for 'Recent Locations Tracked' with the value '10', and a link 'Clear Recent Locations'. The 'Location Search' section has an information icon and a link 'How do I configure location search settings?'. It contains a text box for 'The search service associated with the following site collection is used for farm wide search:' with the value 'http://appserver-2013'. There are three radio buttons: 'First site collection added (default)' (selected), 'Specific site collection', and 'Disable search across site collections'. The 'Search query mode' section has two radio buttons: 'Keyword query language search (default)' and 'Title property search' (selected). The 'Location Filtering' section has an information icon and a link 'How do I configure location filtering settings?'. It contains a text box for 'When filtering locations in the Navigation Tree use the following filter mode:' with the value 'http://appserver-2013'. There are two radio buttons: 'Starts with' typed characters (default)' and 'Contains' typed characters' (selected). At the bottom right are 'OK' and 'Cancel' buttons.

OnePlaceMail - Settings

My SharePoint | Outlook | Preview | Site Mailboxes | Save | Search | Launch | Credentials | Proxy | Licensing

Recent Locations

☒ Show Recent Locations in Navigation Tree

Recent Locations Tracked: [Clear Recent Locations](#)

Location Search

[How do I configure location search settings?](#)

The search service associated with the following site collection is used for farm wide search:

☒ First site collection added (default)

☐ Specific site collection

☐ Disable search across site collections

Search query mode:

☐ Keyword query language search (default)

☒ Title property search

Location Filtering

[How do I configure location filtering settings?](#)

When filtering locations in the Navigation Tree use the following filter mode:

☐ 'Starts with' typed characters (default)

☒ 'Contains' typed characters

OK Cancel

OnePlaceMail – Settings: My SharePoint

Recent Locations

OnePlaceMail allows you to track locations where you have recently saved content within SharePoint. This provides a streamlined process both capturing and accessing content from SharePoint.

You can clear the Recent Location history using the link provided.

Location Search

Farm Level Search capability

You can either disable SharePoint farm-wide search capabilities or set a specific Site Collection to determine the SharePoint Farm to search. When search text is entered in the navigation tree without selecting a specific node in the tree, a farm-wide search is executed.

Search query mode

OnePlaceMail provides the flexibility of performing a Title property Search or a Keyword query language search. A full explanation and examples are provided in the online knowledge base article.

<http://www.scinaptic.com/support/0132.html>

Location Filtering

OnePlaceMail provides the flexibility to filter content using a 'Starts with...' or a 'Contains...'. A complete explanation and examples are provided in the online knowledge base article:

<http://www.scinaptic.com/support/0131.html>

1.51.2 Outlook Tab

The screenshot shows the 'OnePlaceMail - Settings' dialog box with the 'Outlook' tab selected. The dialog has a blue title bar and a tabbed interface. The 'Outlook' tab is active, showing configuration options for Outlook integration. The settings are organized into sections: 'General*', 'Data Location (Advanced)*', 'Email Content Type', and 'Logging (Advanced)*'. Each section contains checkboxes, radio buttons, and text input fields. Information icons (i) are present next to several options. At the bottom, there are 'OK' and 'Cancel' buttons.

OnePlaceMail - Settings

My SharePoint | **Outlook** | Preview | Site Mailboxes | Save | Search | Launch | Credentials | Proxy | Licensing

General*

- ☒ Prompt to 'Save to SharePoint' when adding attachments to an email ⓘ
- ☒ Prompt to 'Save to SharePoint' when sending an email ⓘ
- ☐ Add category to items after saving to SharePoint
Category Name:
- ☐ Show welcome screen at startup
- ☒ Use Document Ids when creating links

Data Location (Advanced)*

- ⓘ [What is the difference between the Data File locations?](#)
- ☒ OnePlaceMail Data File - Local user profile (Recommended)
- ☐ OnePlaceMail Data File - Roaming user profile
- ☐ Default Data File

Email Content Type

- ☒ Select email content type by default for emails
Content Type Name:

Logging (Advanced)*

- ☐ Enable application logging (support) ⓘ [Open log file location](#)

* Please restart Outlook for these changes to take effect.

OK Cancel

OnePlaceMail – Settings: Outlook configuration options

General

The General section on the Outlook tab provides the ability to modify some global settings of OnePlaceMail with respect to using OnePlaceMail in Microsoft Outlook.

Prompt to 'Save to SharePoint' when adding attachments to an email

This is a global setting to control the behavior for managing attachments in new emails. If enabled, OnePlaceMail will prompt the user to upload email attachments to SharePoint and create a URL link in the new email to the newly created item (file) in SharePoint.

Prompt to 'Save to SharePoint' when sending an email

This is a global setting to control the behavior for saving sent emails to SharePoint. If enabled, OnePlaceMail will prompt the user to save the sent emails into SharePoint.

Add category to items after saving to SharePoint

This setting displays the Outlook Category name which will be set on emails copied to SharePoint. The setting can be controlled by the Administrator using the config_update process. This setting is for display purposes only in the Outlook client.

Show welcome screen at start-up

OnePlaceMail provides a Welcome screen and tour for some of the core features of the solution. Click on the 'Take a tour' button to learn some of these capabilities.



Welcome Screen



Welcome Screen – Getting started tour

Data Location (Advanced)

OnePlaceMail folder location

OnePlaceMail Data File – Local user Profile (Recommended): This is the default setting and will place the drag/drop folders in a separate data store to appear on the left navigation of Microsoft Outlook. The folders provided within the data store are to facilitate drag/drop operations of emails or email attachment when transferring to SharePoint. No data or settings are permanently stored within the data store.

OnePlaceMail Data File – Roaming user Profile: This will place the drag/drop folders in a separate data store to appear on the left navigation of Microsoft Outlook. The folders provided within the data store are to facilitate drag/drop operations of emails or email attachment when transferring to SharePoint. No data or settings are permanently stored within the data store. The data file is added to the users roaming directory and is used in a scenario where data in the local directory is removed when using Terminal Services/Citrix environments

Default Data File: This option will place the OnePlaceMail drag/drop folders within the Microsoft Outlook default data store. This is usually a Microsoft Exchange store.

If an organization policy has been enabled to restrict the ability to use local data stores, OnePlaceMail will automatically switch to using the Default Data File mode.

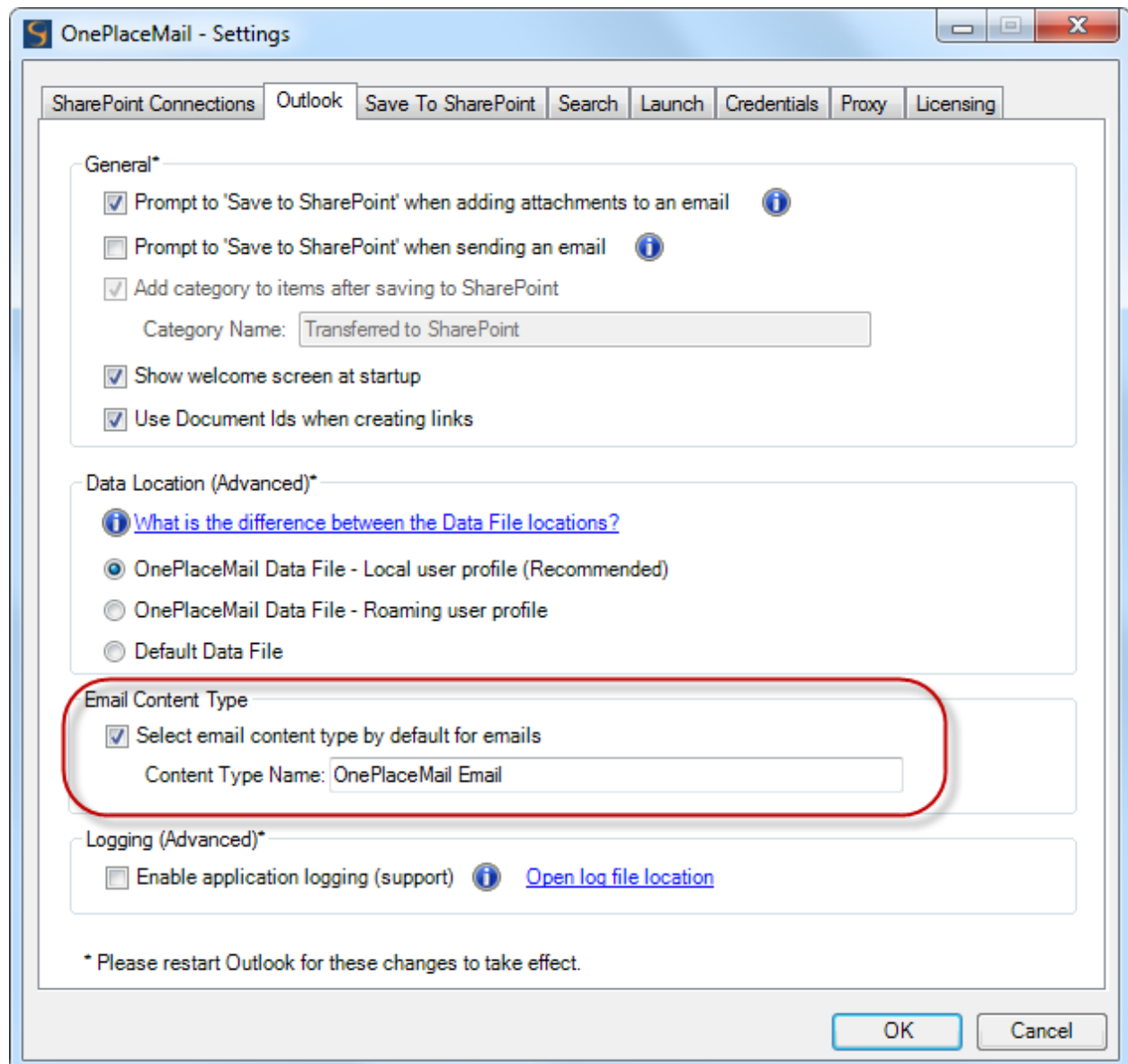
Logging (Advanced)

Enable application logging (support)

Turn on this option if you are experiencing issues with OnePlaceMail and have been instructed by Scinaptic support to enable. Please refer to the knowledge base article for instructions.

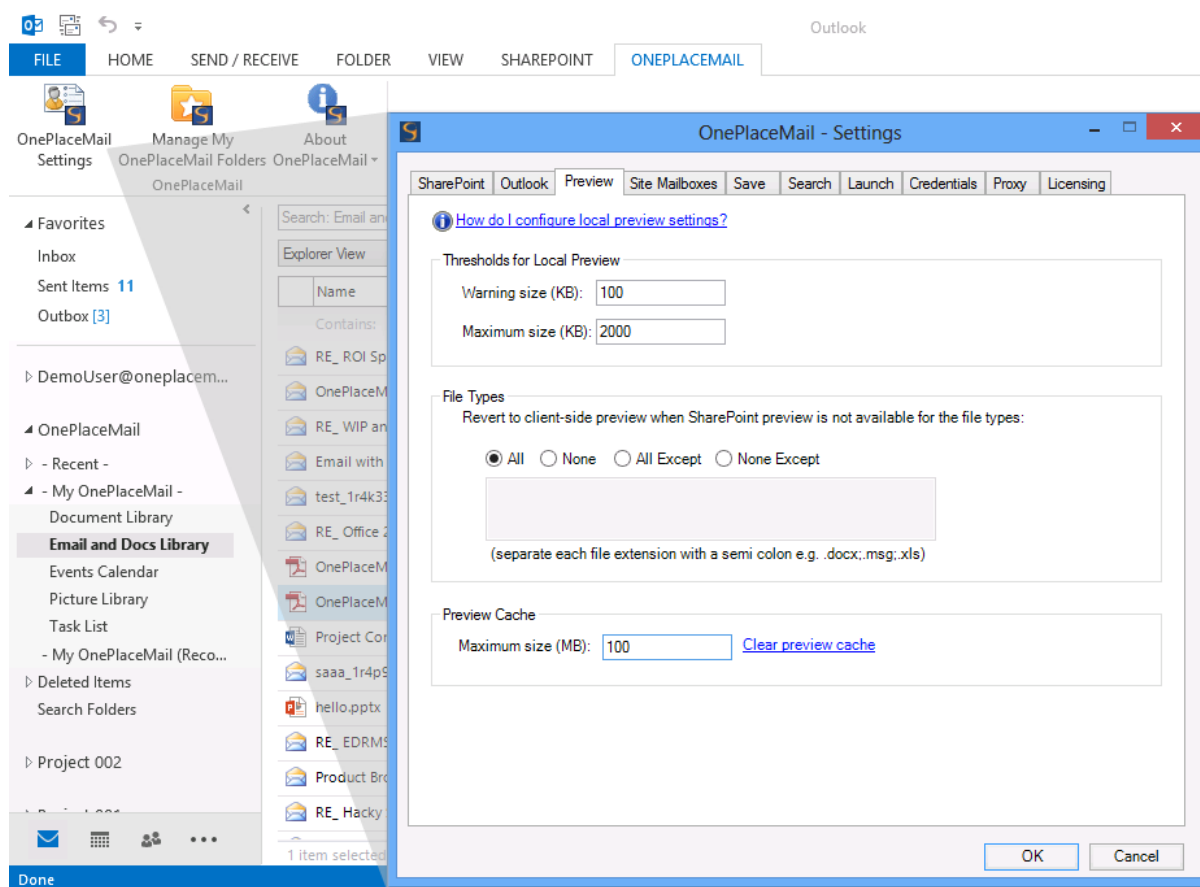
Email Content Type

Override the default Content Type when saving email messages (.msg files) to a library or list. If a Content Type by the specified name exists, the Content Type will be selected by default instead of the library/list default (as defined in SharePoint) when saving email messages. This provides the option of using the same library to store both email and other documents such as pdf, word, excel files while maintaining a streamlined experience when saving and classifying content.



1.51.3 Preview Tab

OnePlaceMail provides performance and governance controls for local previews. These settings can be deployed centrally and access for end users to modify these settings can be removed.



Governance and Performance Controls for Local Previews

Thresholds for Local Preview

OnePlaceMail provides a local preview option when the server-side preview provided by Microsoft Office Web Apps is not available. An administrator (and if access is provided, the end user) can adjust settings to control performance and provide a level of governance on network usage.

Any file greater than the 'Warning size' value will require the user to explicitly request to see the preview. Any file greater than the 'Maximum size' will not be available for preview. The Item can be opened in the native application by double-clicking on the item in the view.

File Types

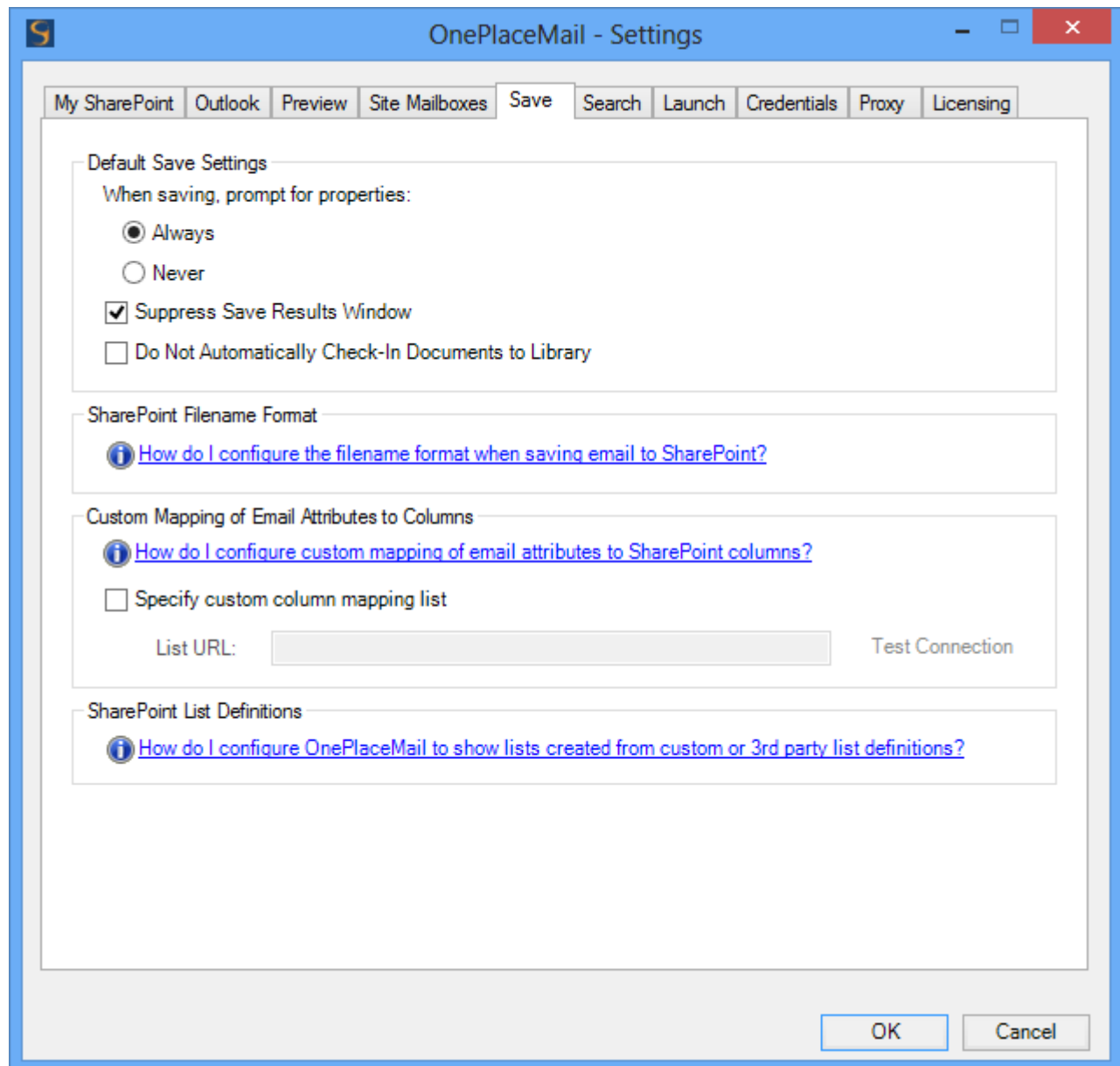
The File Types setting allows you to control what file type you will allow local preview. These settings work in combination with the Threshold settings.

Preview Cache

The Preview cache is the maximum amount of disk space allocated to store cached files for local preview.

1.51.4 Save Tab

OnePlaceMail Save to SharePoint preferences can be configured in the 'OnePlaceMail – Settings' dialog box.



Settings – Save to SharePoint: Configuration options

Default Save Settings

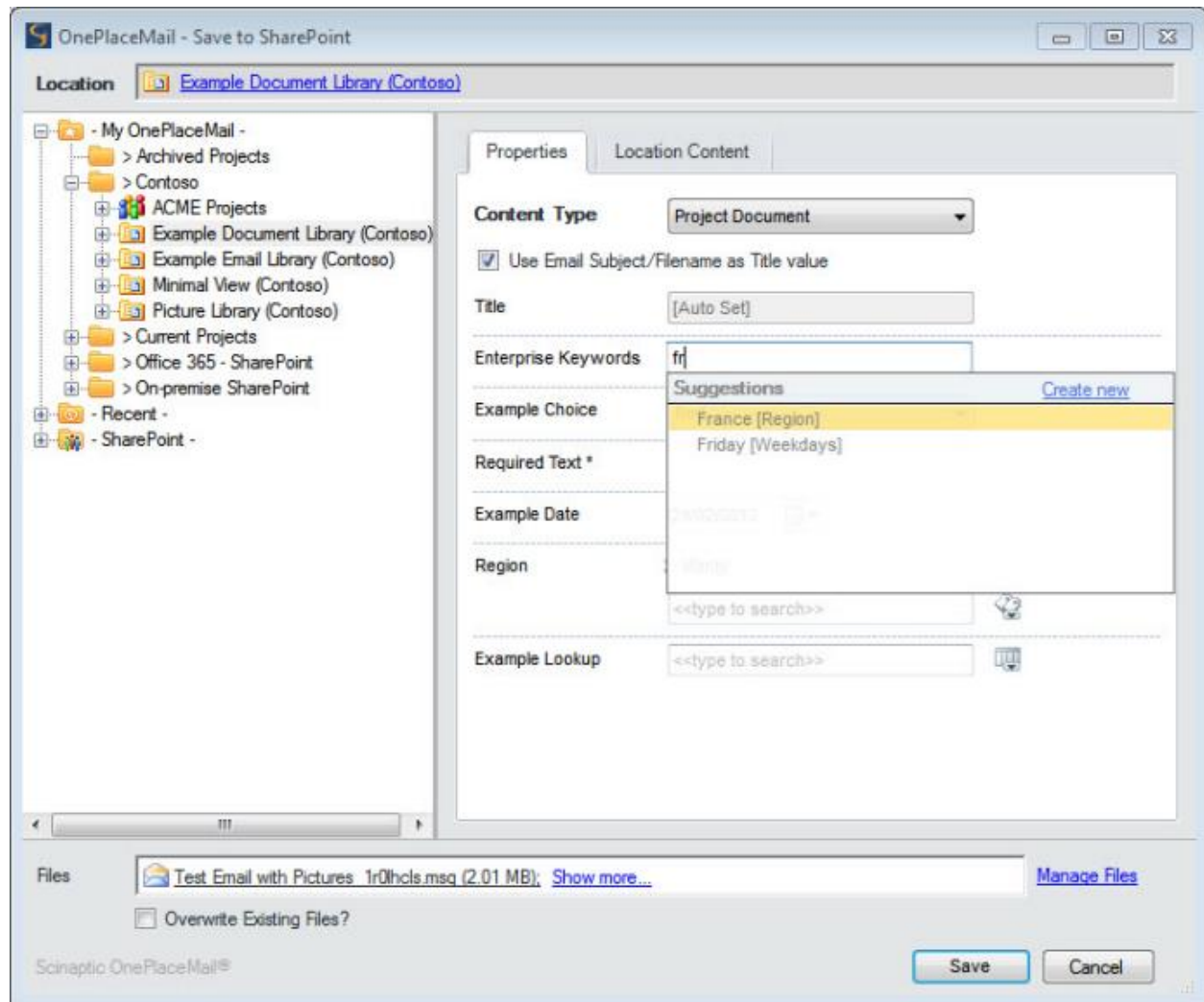
The Default Save Settings section provides the ability to define the default behavior and save settings when transferring files to SharePoint. These default settings can be overridden for specific SharePoint save locations (library/list, library folders, document sets). See the 'Manage My OnePlaceMail Folders' section in this User Guide for further information on each setting within this area.

When saving, prompt for properties: Always

If selected, the Save to SharePoint Window will be presented when saving content to SharePoint. This allows the completion of SharePoint Columns (metadata) as defined for the destination location and Content Type in SharePoint.

This option is most appropriate where additional Column information is to be captured by the user at the point of saving.

Note: in the case of filing emails messages or email attachments, the email attributes are automatically captured and promoted to SharePoint columns.



Save to SharePoint Window used for completing addition metadata information

When saving, prompt for properties: Never

If selected, the Save to SharePoint Window will not display. Therefore, the user will not be prompted to complete any additional Column information.

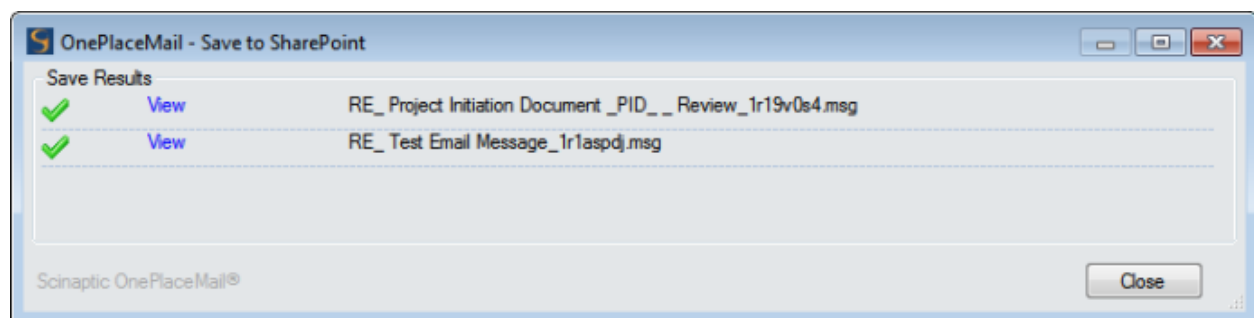
This option is most appropriate where emails and/or attachments are being saved to SharePoint libraries/list with only the standard email attributes being captured.

Suppress Upload Results Window (Enterprise Edition only)

The Save Results Window presents the status for each email/file saved to SharePoint. The potential statuses are:

- Successful
- Successful & Checked-Out
- Unsuccessful

The Save Results window provides the ability to View the successfully saved Items in SharePoint. The window also provides an extended explanation for any unsuccessful save attempts.



Save to SharePoint Results window

Enabling this option will suppress the Save Results Window from appearing. However, the window will still appear in the exception where there is an unsuccessful save attempt for an emails/file.

Do Not Automatically Check-In Documents to Library

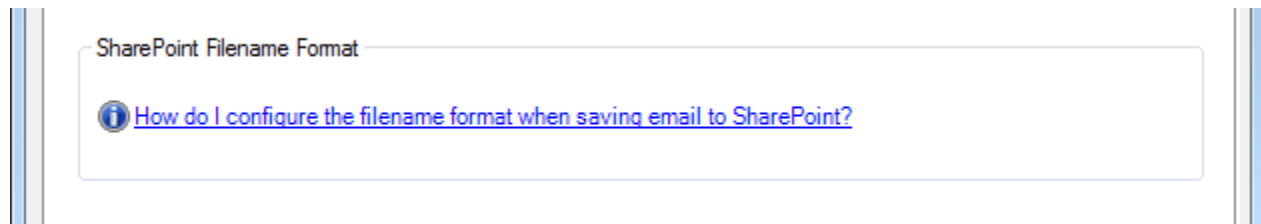
By default, all emails/files saved by OnePlaceMail to SharePoint are automatically checked-in. This behavior can be reversed by enabling this option on a global basis or for selected libraries/lists (See Manage My OnePlaceMail Folders).

SharePoint Filename Format

OnePlaceMail supports a number of file naming conventions for files saved to SharePoint. By default, duplicate checking of emails is performed. The knowledge base article provided on the 'Save to SharePoint' tab provides further detail.

In all save to SharePoint configurations, OnePlaceMail automatically captures standard email attributes (e.g. To, CC, From, Subject, Category, Conversation, Email Type, Date Sent/Received) from email messages or email attachments transferred to SharePoint.

Each SharePoint filing location will use either the default folder settings as defined in this Settings area or can be overridden in the 'Manage My OnePlaceMail Folders' window to use different settings as required for different filing locations.



Column Mapping of Email Attributes to Columns

OnePlaceMail provide a SharePoint Sandbox Solution which includes SharePoint email Columns for capturing email attributes. If these email Columns are available in your SharePoint Library/List or Content Type, email attributes are automatically be promoted to the SharePoint Columns.

If you prefer to map the email attributes to different SharePoint Columns, you can create a Column mapping table in SharePoint and direct the OnePlaceMail client to reference the mapping table. Refer to the OnePlaceMail implementation guide for instructions.

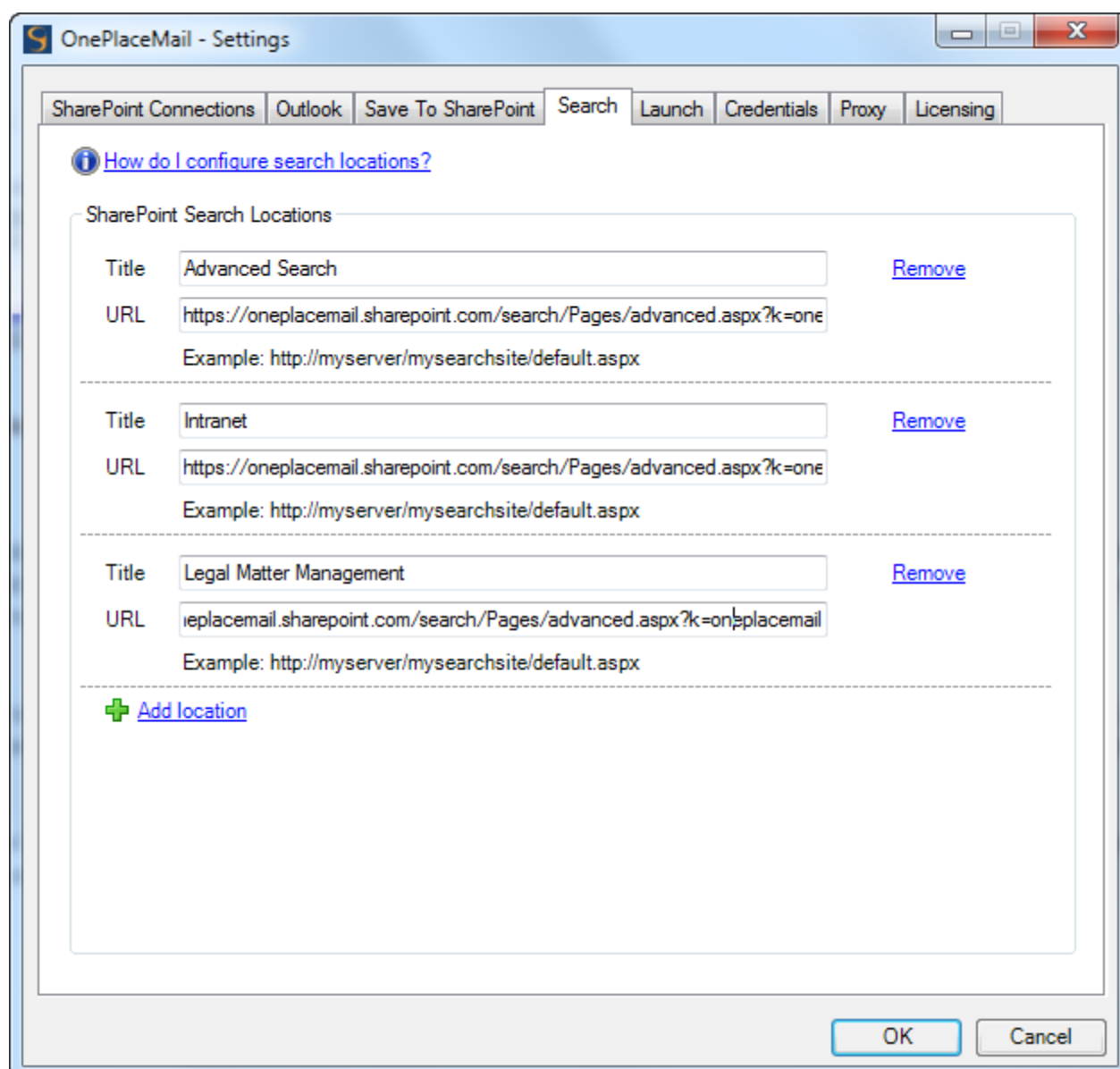
You are not required to create a mapping table, and therefore a List URL if you use the email Columns provided by OnePlaceMail.

1.51.5 Search

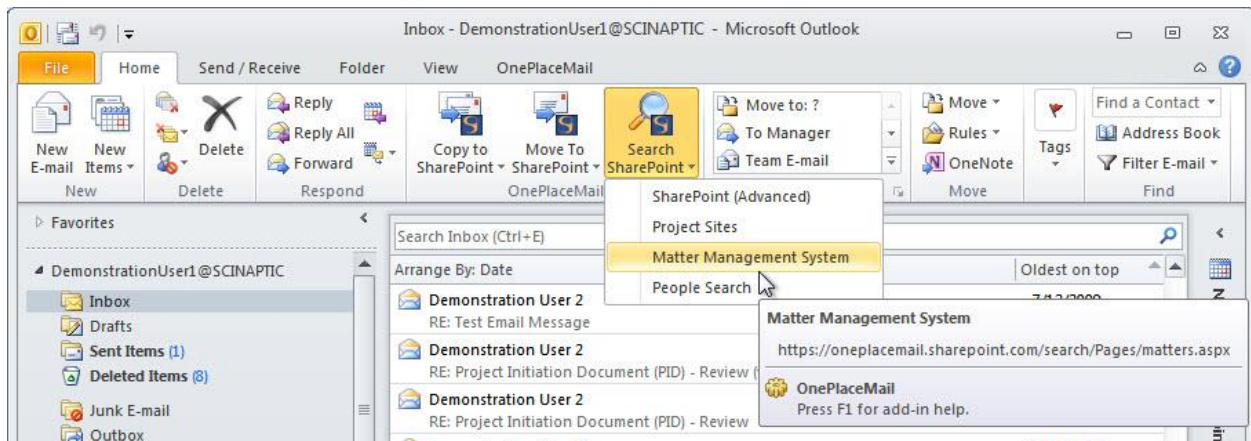
OnePlaceMail provides the ability to search SharePoint directly from within Microsoft Outlook. This includes providing direct access to SharePoint Search, Fast Search and other 3rd Party search solutions and capabilities for user from within Microsoft Outlook.

The Settings – Search Tab allows you to define one or more search locations/scopes. The Search locations are available in Microsoft Outlook, Office Word, Excel and PowerPoint (Office 2007 and 2010).

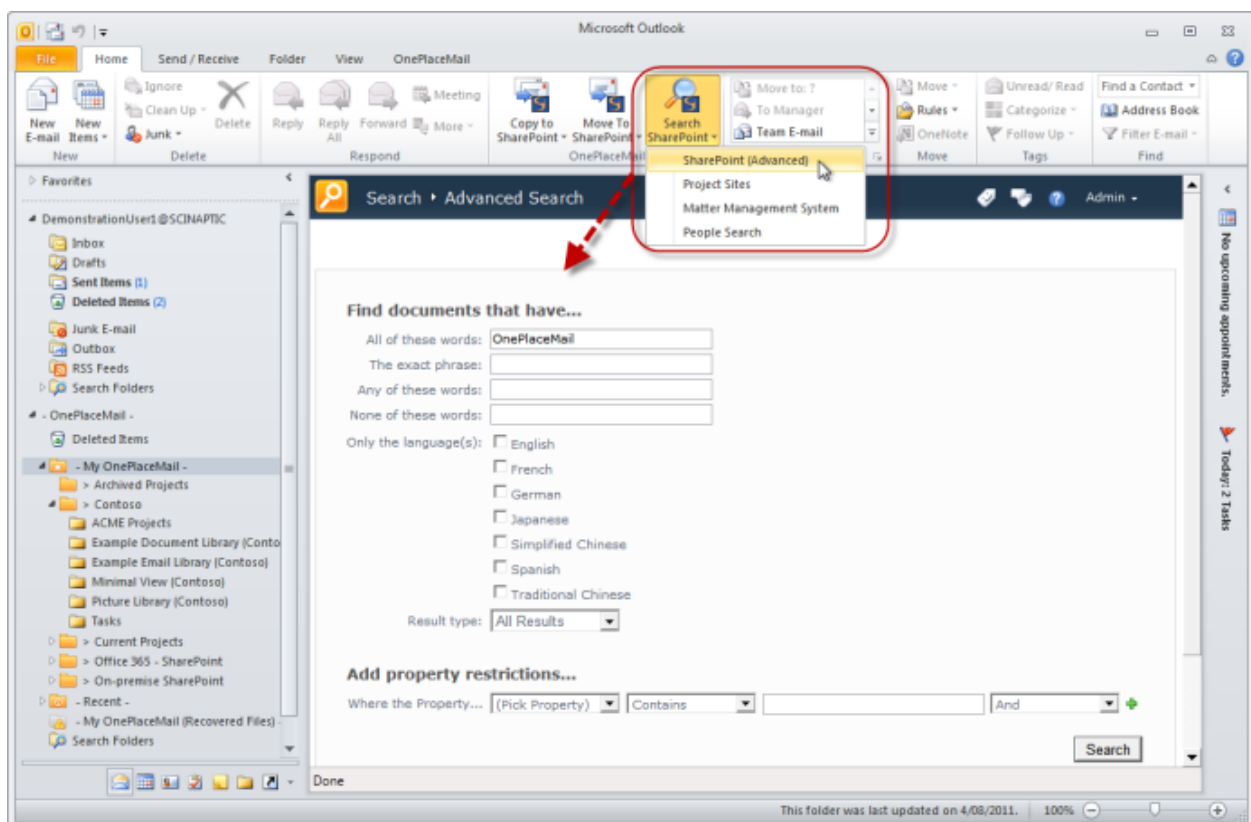
Tip: You can deploy the Search Site locations using the Config_update process described in the OnePlaceMail Administrator guide. See: <http://www.scinaptic.com/support/docs/index.html>



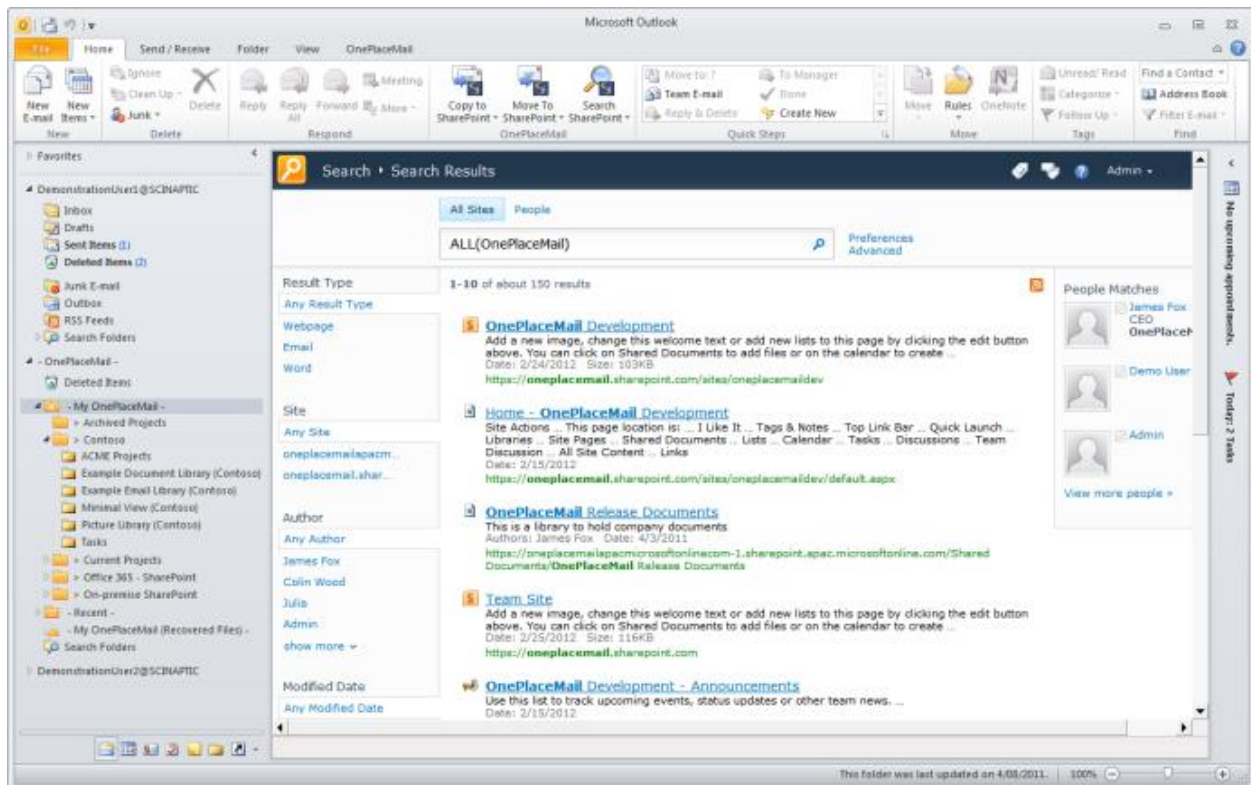
OnePlaceMail - Settings: Define Search Locations/Scopes



Select Search Location



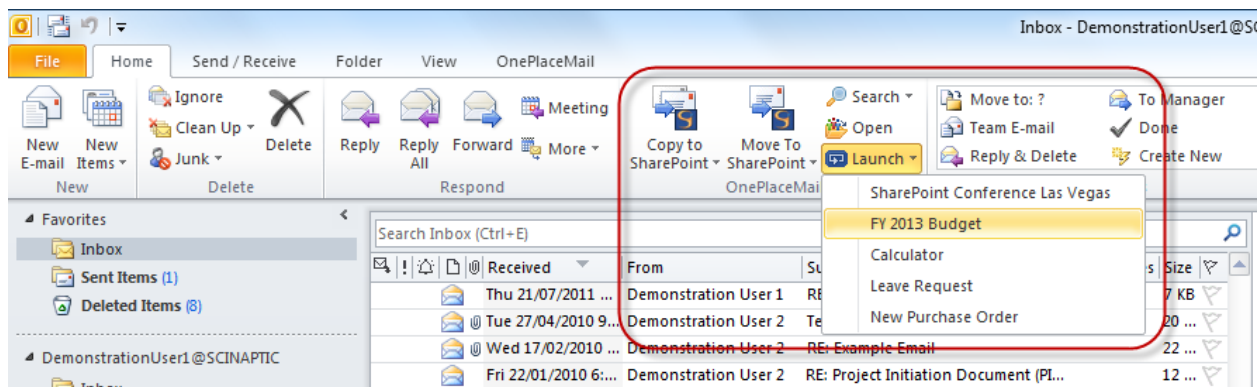
Perform SharePoint Search



SharePoint Search Results

1.51.6 Launch

The Launch Tab provides the ability to define one or more items to include under the Launch button. The items can either be Web Pages (URL's) or Files/Applications.



Launch Button within Outlook

Linking to a Web Page

The Web pages (URL) option will open the web page embedded within Microsoft Outlook. These can be web pages internal to your SharePoint environment or external web pages. The entries must start with either **http://** or **https://**.

Launch Items

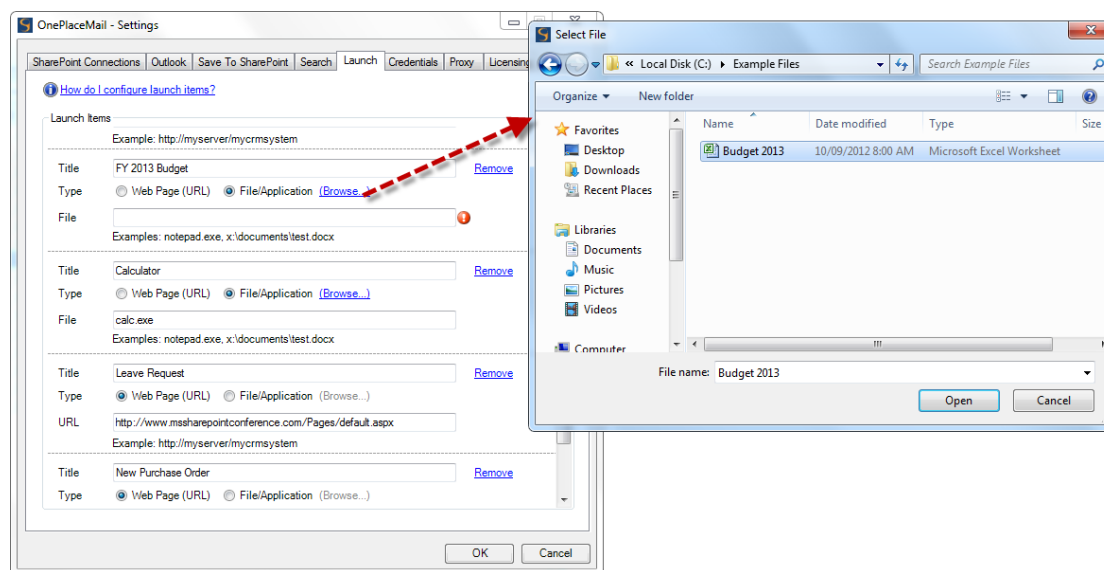
Title	<input type="text" value="SharePoint Conference Las Vegas"/>	Remove
Type	<input checked="" type="radio"/> Web Page (URL) <input type="radio"/> File/Application (Browse...)	
URL	<input type="text" value="http://www.mssharepointconference.com/Pages/default.aspx"/>	

Example: <http://myserver/mycrmsystem>

Settings Window – Launch: A Web Page (URL)

Linking to a File or Application

The File/Application option allows you to browse and add a specific application (e.g. Notepad.exe, Calc.exe, and Excel.exe) or path to file (e.g. c:\My Documents\examplefile.xlsx).



Settings Window – Launch: A File/Application

Title	<input type="text" value="FY 2013 Budget"/>	Remove
Type	<input type="radio"/> Web Page (URL) <input checked="" type="radio"/> File/Application (Browse...)	
File	<input type="text" value="C:\Example Files\Budget 2013.xlsx"/>	
Examples: notepad.exe, x:\documents\test.docx		

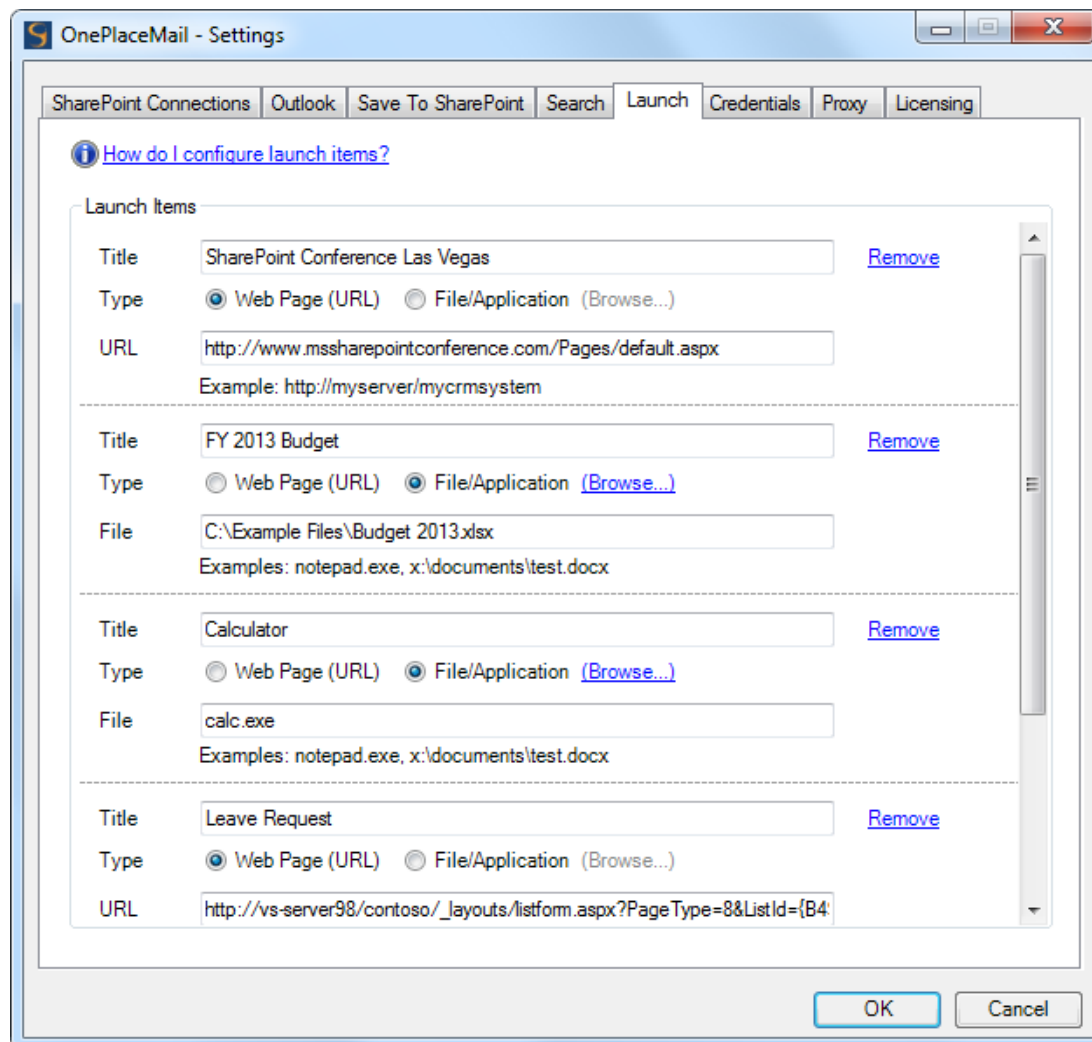
Settings Window – Launch: Directly to a file

Note: If you enter a web page URL when the File/Application option is selected, the web page will be opened in a new Web Browser window instead of embedded within Microsoft Outlook.

The launch items can also be deployed centrally by your Administrator (see Administrator Guide for details).

The Launch Tab allows you to define multiple locations.

As shown by the Leave Request example in the screenshot below, the Launch Item URL can be a link for creating new List or Library Items e.g. Purchase Order Request, Leave Request.

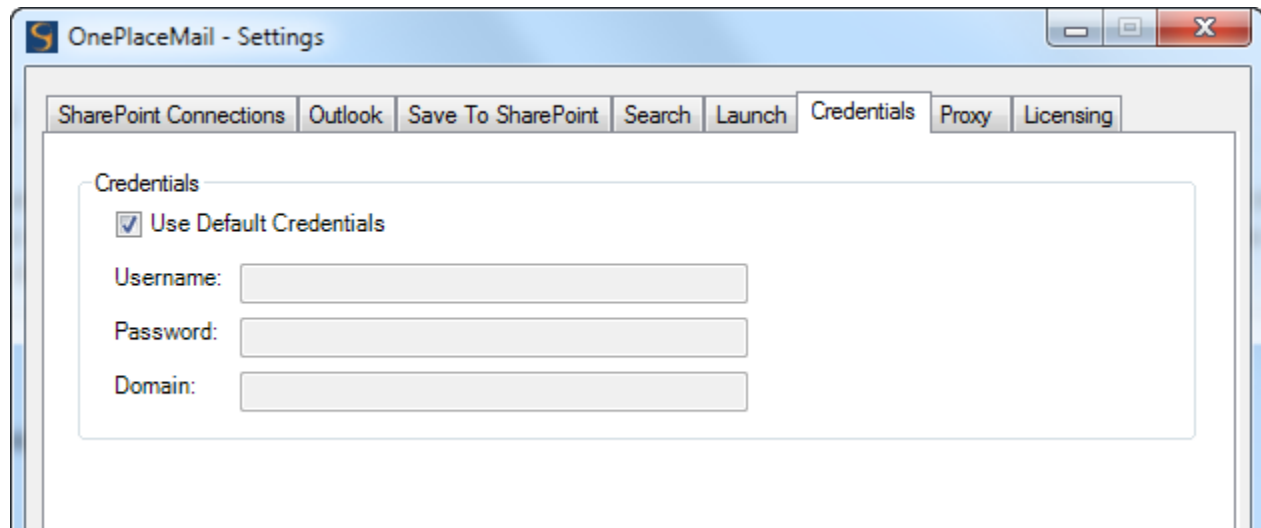


OnePlaceMail Settings - Launch

1.51.7 Credentials - Username, Password and Domain

By default, OnePlaceMail uses the Windows Username/Password and Domain of the currently logged in user. The Credentials Tab provides the ability to provide alternate credentials.

By default, **Use Default Credentials** is enabled.



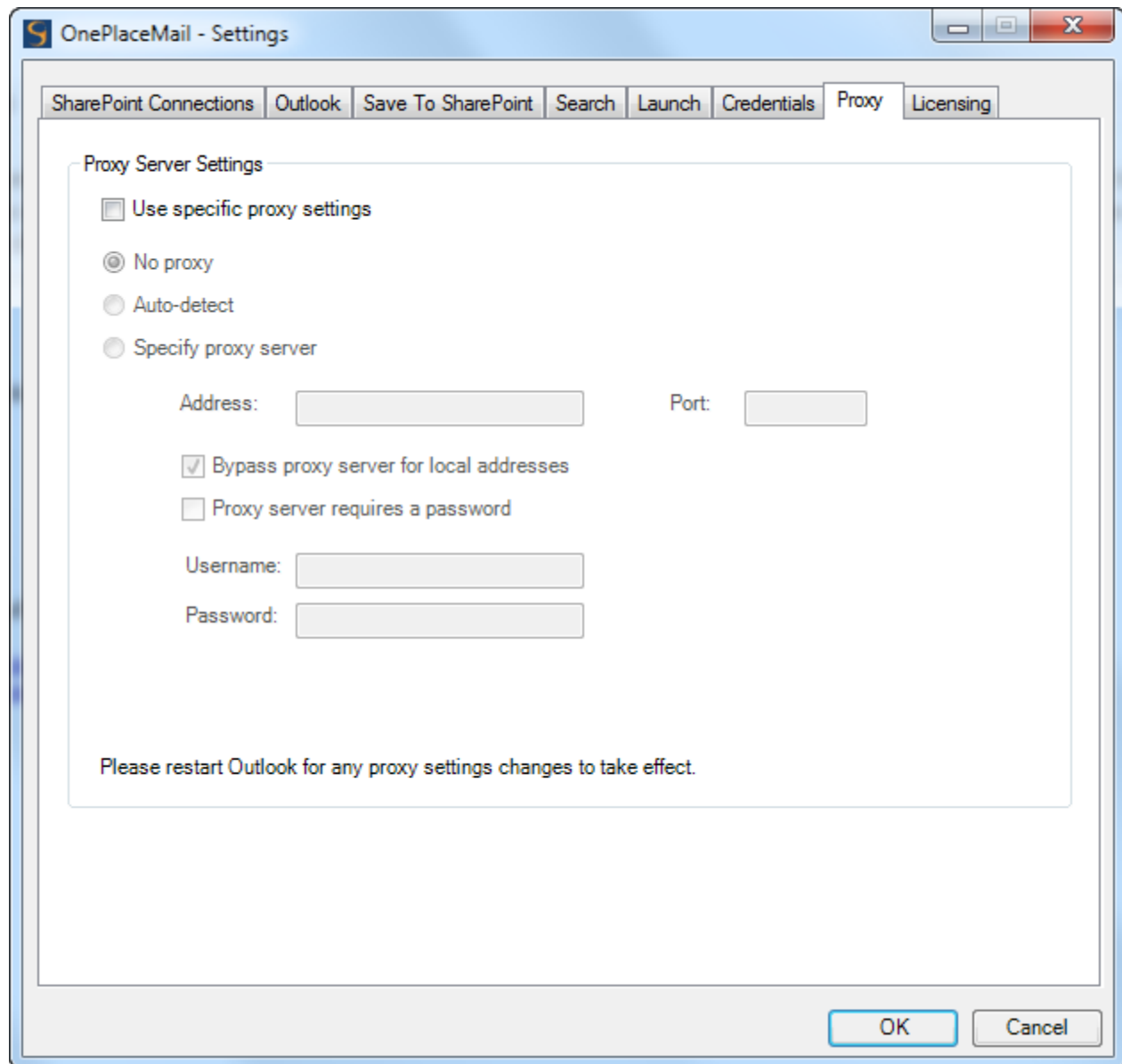
OnePlaceMail Settings - Credentials

If you would like to use different credentials to connect to SharePoint, simply enter them in the fields provided on the **Credentials Tab**.

For example, if a SharePoint server is in a different Active Directory Domain and a different username/Password and Domain is required for authentication.

1.51.8 Proxy

If required, you can define specific proxy settings to access your SharePoint environment.



The image shows a screenshot of the 'OnePlaceMail - Settings' dialog box, specifically the 'Proxy' tab. The dialog has a title bar with the OnePlaceMail logo and the text 'OnePlaceMail - Settings'. Below the title bar is a tabbed interface with the following tabs: 'SharePoint Connections', 'Outlook', 'Save To SharePoint', 'Search', 'Launch', 'Credentials', 'Proxy' (selected), and 'Licensing'. The 'Proxy' tab contains a section titled 'Proxy Server Settings'. Inside this section, there are four radio button options: 'Use specific proxy settings' (unchecked), 'No proxy' (selected), 'Auto-detect' (unchecked), and 'Specify proxy server' (unchecked). Below these options, there are two text input fields: 'Address:' and 'Port:'. Further down, there are two checkboxes: 'Bypass proxy server for local addresses' (checked) and 'Proxy server requires a password' (unchecked). Below these are two more text input fields: 'Username:' and 'Password:'. At the bottom of the 'Proxy Server Settings' section, there is a message: 'Please restart Outlook for any proxy settings changes to take effect.' At the bottom right of the dialog box, there are two buttons: 'OK' and 'Cancel'.

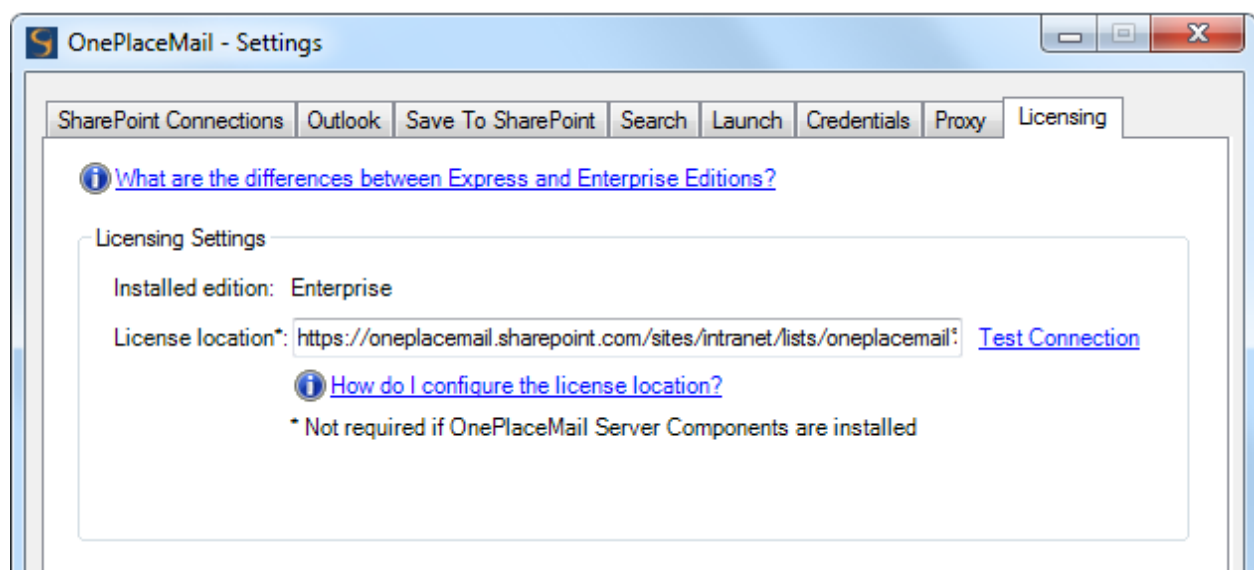
OnePlaceMail Settings - Proxy

1.51.9 Licensing

The Licensing Tab allows you to specify the central location of your OnePlaceMail license list. This is used by the Enterprise edition of OnePlaceMail when saving to SharePoint 2010 or Office 365 environments.

Note: OnePlaceMail Server Components are required for SharePoint 2007 environments. You can optionally install Server components in a SharePoint 2010 environment but is not a requirement. If you install the Server Component, this license tab is not utilized as licensing is performed on the Server

The OnePlaceMail Enterprise edition implementation guide provides further instructions regarding OnePlaceMail licensing. See: <http://www.scinaptic.com/support/oneplacemail-implementation-guide.html>



OnePlaceMail Settings - Licensing

Upgrading from the Express edition to the Enterprise edition involves uninstalling the Express Edition client, and installing the Enterprise edition client.

The License tab also details current edition of OnePlaceMail installed. This can either be the Express edition (free) or the Enterprise edition.

Tip: The license location (URL) can be deployed centrally to all user machines.

OnePlaceMail Configuration

1.52 Configuration Settings

OnePlaceMail client configuration can be performed directly within the Microsoft Outlook Client or throughout the enterprise by using the OnePlaceMail Config_Update.xml process described in the Administrator Guide.

The Enterprise Edition also includes the facility to call a custom Web Service for the creation and deployment of configuration settings on the client (e.g. Microsoft Outlook). For example, the Web Service can be used to automate the process of updating Outlook Folders on the left navigation of Outlook. Therefore, making it easy to drag and drop emails to the correct location within SharePoint.

The Config_Update.xml configuration process provides ultimate flexibility for the enterprise to deploy OnePlaceMail across different departments, users and for specific business requirements. Complete control can be provided to the end user, a subset of configuration controls can be provided or complete control can be maintained at the enterprise level. All configuration options and levels of control can be changed over time using the Config_update.xml process. Please refer to the Administrator guide for instructions on using the enterprise Config_update.xml process to manage all aspects of configuration and deployment.

1.53 Supported Environments

OnePlaceMail is supported to work within the following environments:

1.53.1 Clients

- Microsoft Outlook/Office 2003 (Word, Excel, PowerPoint) **
- Microsoft Outlook/Office 2007 (Word, Excel, PowerPoint)
- Microsoft Outlook/Office 2010 (Word, Excel, PowerPoint) – 32/64 bit.

**** Microsoft Office Versions:**

OnePlaceMail enhancements and fixes are being provided for Microsoft Outlook/Office 2007 and 2010 (32/64 bit). Microsoft Outlook/Office 2003 is supported with OnePlaceMail Release 6.0 but is not being enhanced further.

1.53.2 SharePoint Servers

- SharePoint 2013
- SharePoint 2010
- Office 365
- WSS v3/MOSS 2007 (OnePlaceMail Enterprise Edition Only)

OnePlaceMail supports mixed/hybrid environments for saving content to both on-premise SharePoint and Office 365 or private cloud environments.

1.53.3 Operating system

- Windows 8 (32/64 bit)
- Windows 7 (32/64 bit)
- Windows XP
- Vista
- OnePlaceMail also works within Terminal Services/Citrix environments.