

OnePlaceMail User Guide | 6.6

Overview

- Manage SharePoint Locations
- Save items from Outlook to SharePoint
- Send and save emails to SharePoint
- Microsoft Outlook Style Interface to SharePoint
- Insert from SharePoint
- Open from SharePoint
- Manage email attachments
- Transfer files from windows to SharePoint
- Access SharePoint content directly from Outlook
- Further configuration options
- Alternate file transfer methods
- OnePlaceMail productivity tools for Office
- Extend SharePoint 2013 Site Mailboxes

Scinaptic Communications Pty Ltd

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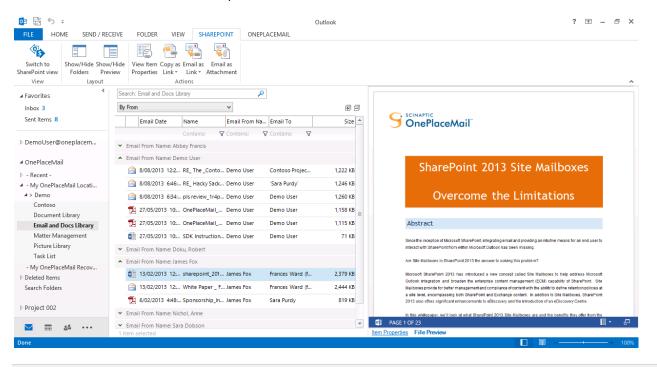
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Document Purpose

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

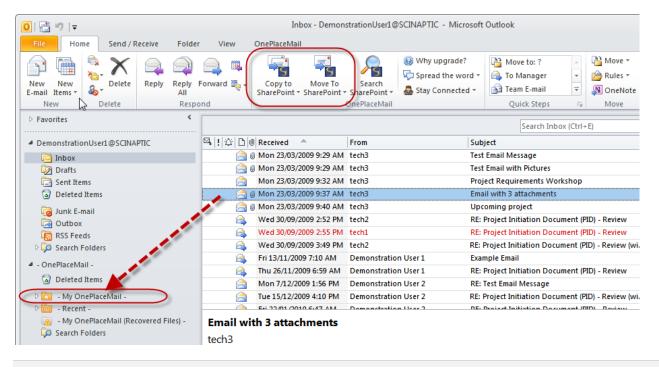
OnePlaceMail encourages the adoption of SharePoint by providing seamless capture, classification and access to content within SharePoint from your familiar Microsoft Outlook Client and other desktop applications such as File Explorer, Word, Excel and PowerPoint.

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.

	Save to SharePoint	
cation 🚺 - Pl	lease select a location -	
My OnePlace		nat files cannot be saved to.
	Image: Add SharePoint Connection URL: http://]. Image: I	
	OK Cancel	
1	ject Requirements Workshop 1r0lhcr5.msg (19.5 KB) rwrite Existing Files?	Manage Files
naptic OnePlaceM		Save Cancel

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.

S OnePlaceMail - Save to SharePoint	🖉 Example Document Library - All Documents - Windows Internet Explorer
Location 0 - Please select a location -	🚱 🕞 🕫 https://oneplacemail.sharepoint. 🔻 🔒 44 🕅 📴 Bing 🖉 🗸
My OnePlaceMal - SharePoint - Properties Location Content defClick to Add SharePoint Connection	☆ Favorites ☆ Suggested Sites ▼ <a>Web Slice Gallery ▼ <a>Office 365 Demo - Home [™] Stample Document Library - All Documents Solution 1 Solution 1 Solution 2 S
The selected location (on the left) and Please select a location	Site Actions 👻 😥 Brov Doc Libr
Add SharePoint Connection	Image: Share & Copies Workflows Image: Share & Copies Workflows Image: Share & Copies Itike Track Notes
URL: https://oneplacemail.sharepoint.com/sites/Contoso/Example%20Docum	New Folder Document It Notes New Open & Check Out Tags and Notes
How do I add SharePoint connection?	Libraries Type Name Email Date Email From Name
OK Cancel	Example Document Library Project 001
	Example Email Library Project 002
	Project 003
	Pictures Add document
	Internet Protected Mode: On 4 € 125% ▼

Copy/Paste full URL from SharePoint Library/Site

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

OnePlace	Mail - Test Connection
i	Congratulations you are connected. Your SharePoint Site Collection is 'https://oneplacemail.sharepoint.com/sites/Test'.
	ОК

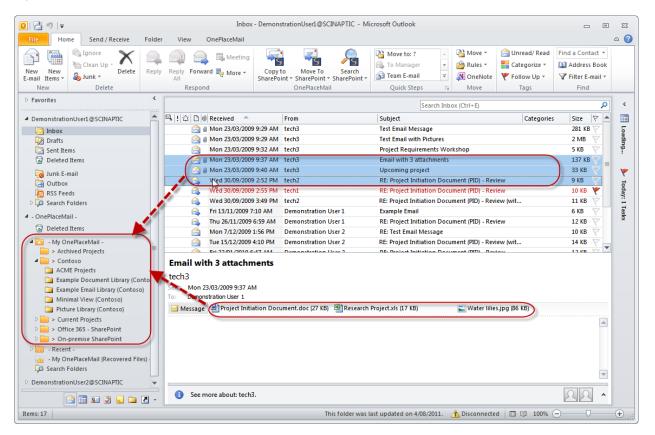
Confirmation of your connection to SharePoint

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.



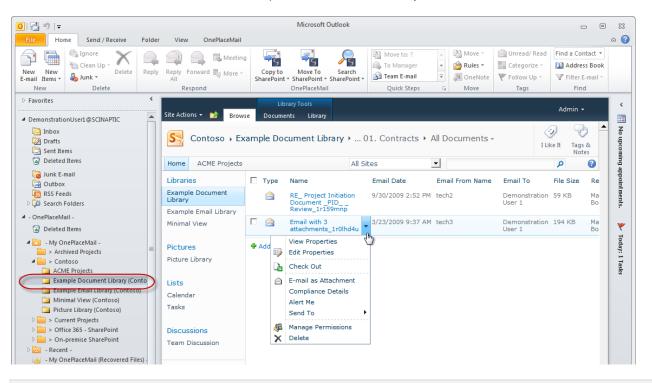
Drag & Drop emails or attachments to left navigation

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

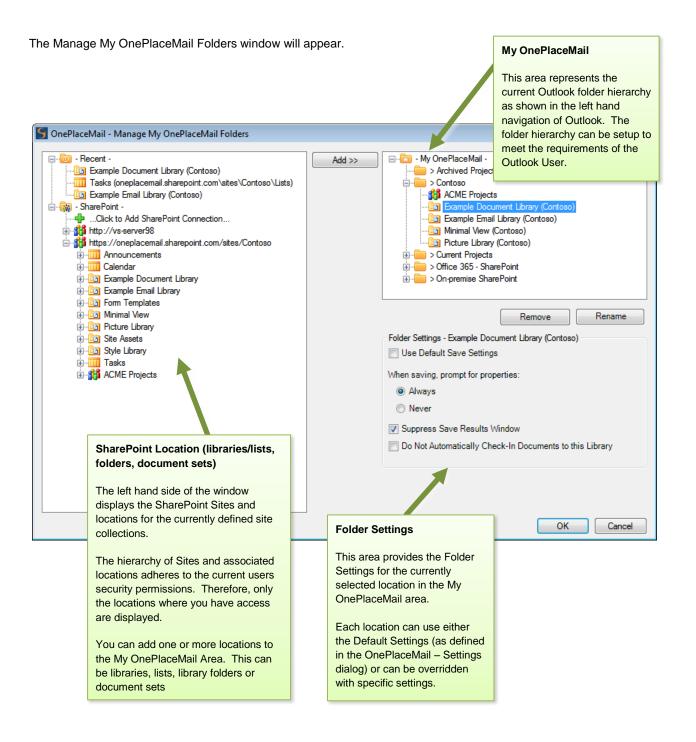
The Manage My OnePlaceMail Folders window provides the ability to manage the My OnePlaceMail area on the left navigation in Outlook. This is where you can add/remove one or more libraries/lists from SharePoint into Outlook to facilitate the transfer of emails and attachments.

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.**

0 ¦⊒"", -			Inbox - Demons	strationUser1@SCIN	APTIC - Microsoft Outlook
File Home Send / Receive	Folder	View	OnePlaceMail		
OnePlaceMail Settings DePlaceMail Folders OnePlaceMail DePlaceMail	About PlaceMail	•			Search Inbo
			1	2000	
DemonstrationUser1@SCINAPTIC		S. ! O D 0	Received A	From	Subject
		0[] \$ \$ \$	Received Mon 23/03/2009 9:37 AM	1	Subject Email with 3 attachments
DemonstrationUser1@SCINAPTIC Inbox Drafts				tech3	

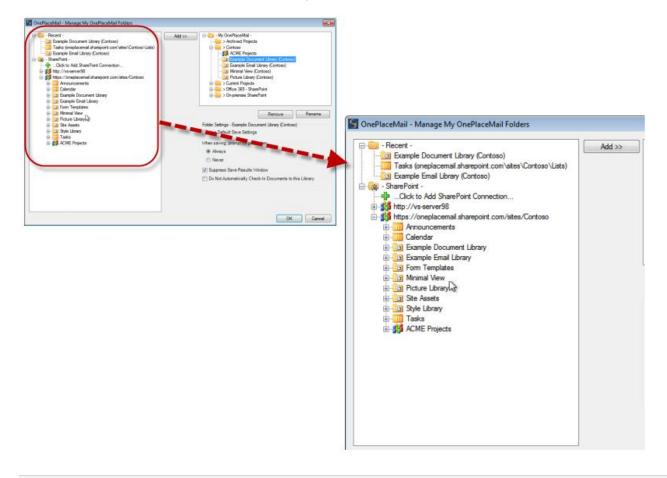
Select Manage My OnePlaceMail Folders (Favorite Locations)



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'.

		++++	
URL:	http://l	な	Test
	How do I add SharePoint connection?		
		OK	Const

Remove SharePoint Connection

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

写 OnePlaceMail - Manage My OnePlaceMail Folders		
	Add >>	
	Connection	

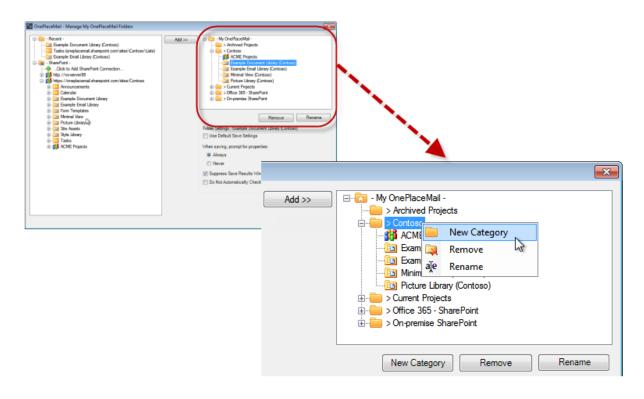
SharePoint Locations

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 selcted 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).

GnePlaceMail - Manage My OnePlaceMail Folders			
Beet Beet	Md 30	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	y

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

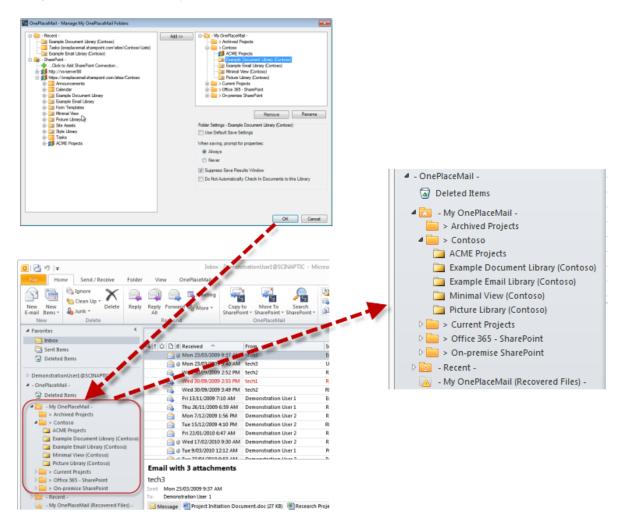
Once you have completed all your selections in the Manage My OnePlaceMail Folders window, click OK.

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).

112 11 =			Microsoft Outlook				•	• 8
Home Send / Receive Folder	Reply Farm		ny to Move To Search	Contractors To Move to: T	A Move Move Move Move Move		Find a Conta	look
New Delete	All Respon	5. C	Point * SharePoint * SharePoint * OnePlaceMail	Quick Step	and the second	Tags	Find	40.7
Favorites 4		Library Tools			n de la classifica			
inbox	Browse	Documents Library					Admin *	
 Sent Rems Deleted Rems 	S c	ontoso 🔸 Minimal '	View + All Minimal -			(international contents)		A Sustainable formation
DemonstrationUser1@SCINAPTIC	Hame 4	ACME Projects	40	Sites			Notes	
- OnePlaceMail -	Home A	VCME Projecta	[Aii	Sites	<u>.</u>		2 6	de la la
Deleted dems A OnePlaceMail -	П Туре	Email Date	Name		Email From Name	Email To	File Size	- Contract
Archived Projects	a	7/21/2011 11:57 PM	RE_Test123_1r2rk9ql		Demonstration User	Demonstration User	1 43 KB	
ACME Projects	6	4/27/2010 9:53 AM	Test Sending Email_1r1mg7jj		Demonstration User 2	Demonstration User	1 62 KB	
Example Document Library (Contoso) Example Email Library (Contoso)	□ @	3/9/2010 12:11 AM	Project A0001 _ Specification_	1r1idri2	Demonstration User	Demonstration User	1 2501 KB	
Minimal View (Contoso) Picture Library (Contoso)	6	2/17/2010 9:30 AM	RE_ Example Email_1r1gq4ql		Demonstration over 2	Demonstration User	1 64 KB	case a discon
Current Projects Solution StatePoint Solution StatePoint Solution StatePoint	9	1/22/2010 6:47 AM	RE_ Project Initiation Documer Review_1r1ei9hs	nt_PID	Demonstration User 2	Demonstration User	1 51 KB	ð
0 🔜 - Recent -	8	12/15/2009 4:10 PM	RE_ Project Initiation Documer Review1r1bi490	nt_PID	Demonstration User 2	Demonstration User	1 52 KB	
- My OnePlaceMail (Recovered Files) - GD Search Folders	(3)	12/7/2009 1:55 PM	RE_ Test Email Message_1r1as	spdj	Demonstration User 2	Demonstration User	1 48 KB	
DemonstrationUser2@SCINAPTIC	8	11/26/2009 5:58 AM	RE_ Project Initiation Documer Review_1r19v0a4	nt _PIO	Demonstration User	tech1; Demonstratio User 1	n 54 KB	-
	9	11/13/2009 7:09 AM	Example Email_1r18sokj		Demonstration User	Demonstration User	1 46 KB	
	8	9/30/2009 3:49 PM	RE_ Project Initiation Documer Review1r159q37	nt_PID	tech2	Demonstration User	1 50 KB	
- 5 - 2 - 2 - 2	-	0/20/0000 3-54 04	RE Desired Tablation Pressent	at 010	lasht.	Plantaction that	100.00	•

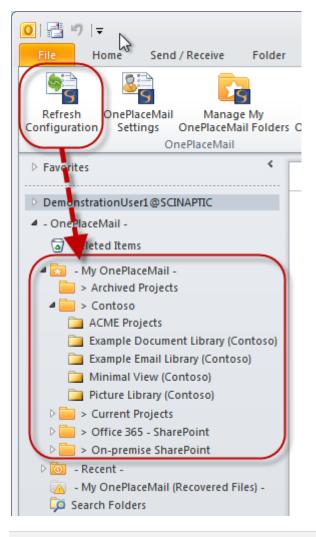
Access SharePoint from within Outlook with control over the look & feel (Minimal View)

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)

Key Points:

process

captured

document sets

Save from Outlook to SharePoint

Step 1: Drag & Drop Emails or Attachments

Drag & Drop emails and/or attachments X from your Inbox to SharePoint locations 63 2 via the My OnePlaceMail folders area 1. Seamless and intuitive drag/drop 2. Email attributes are automatically 3. Supports libraries, lists, folders and 80. O See more about tech IN A HAND

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

 My OnePlaceMail - Archived Projects Contoso 	Properties Loca	tion Content		
ACME Projects ACME Projects ACME Projects Acme Projects Acme Projects Acme Acmedia Acme Acmedia Acmedia		Project Document +		
	Title	[Auto Set]		
	Enterprise Keywords	Antippe to permittee		
On premiae SharePoint Pecent -	Example Choice	Red +		
🗟 🙀 - SharePoint -	Required Text *			
	Example Date	Example Date 22/02/2012		
	Region	× Manly		
		tol T	42	
	Example Lookup	Suggestions Butot (Region: Australia NSW) Bondi Beach (Region: Australia NSW) Bowen (Region: Australia NSW)		
RE Test Estal Message 1/1asp	di mag (25.5 KB); Show more		Manage Files	

Step 3: (Optional) Display Save Results Window

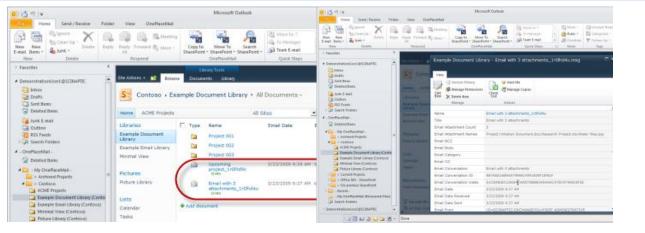
Optionally, the **Save Results Window** will display.

Key Points:

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

Save R	esuits		
1	View	Email with 3 attachments_1r0hd4u.msg	
1	View	Upcoming project_1r0hd9c.msg	
			Gose

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
- Seamless Save to SharePoint process with flexibility to define the required upload options on a library by library basis

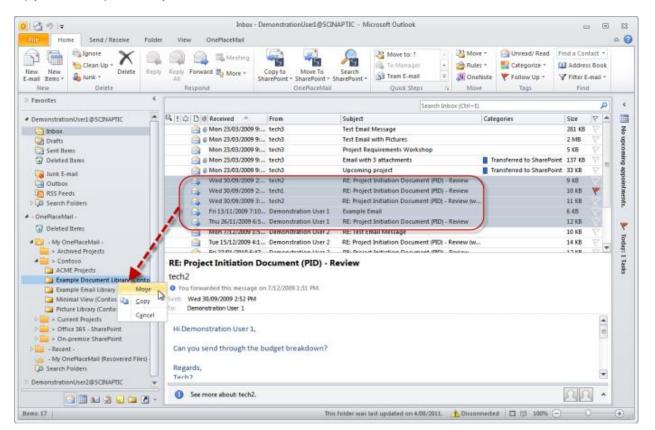
1.2 Step 1: Drag & Drop Emails or Attachments

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.

⊠ 🚽 🧉 🍐 🗇 ╤ Project A0001 - Specification - Message (HTML)	x
File Message	۵ 🕜
Image: Copy to SharePoint * Image: Copy to SharePoint *	
Recent	
picture Library (Contoso) 4e 9/03/2010 12	:10 AM
Example Email Library (Contoso)	
01. Contracts (oneplacemail.sharepoint.com\sites\Contoso\Example Document Library\Project 001)	
Select SharePoint location (2 MB)	
Project Specification.docx (13 KB)	
Hi, OnePlaceMail provides seamless Microsoft Outlook to SharePoint connectivity. Emails and/or attachments can be placed into SharePoint by a simple drag/drop. All email attributes are automatically captured. Kind Regards, Demonstration User 1	
i See more about: Demonstration User 1.	1
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.

Home Send / Receive Folde		DemonstrationUser1@SCINAPTIC - Microsoft Outlook	•	
Print As Attachments Attachment	Selection Message			
Pavontes 4		Search Inbox (Chri-E)		0
DemonstrationUserL@SCINAPTIC	Bit E Bit Received From Image: I	Subject Categories Test Email With Pictures Project Requirements Workshop Email with Pictures Project Requirements Workshop Email with 3 attachments Upcoming project Transferred to SharePoir RE: Project Initiation Document (PD) - Review RE: Project Ini		i kao nito munita internationali e
COMME Projects Example Document Library (Conto Example Enail Ubrary (Contose) Minimal View (Contose) Picture Library (Contose) Contractors Contractor	Humpback Whale.jpg Size: 260 KB Shage dimension: 1024 x 758 Last change: Diordeg, 2 Novimber 2000 The jpg (756 KB) Conden Toco Toucan.jpg (116 KB) See more about: tech3.	jpg (508 KB) Creen Sea Turtle jpg (374 KB) ⊂ Humpback Wh	ale.jpg (260 KB)	

Drag & drop email attachments to SharePoint

Image: Second state state Image: Second state File Message Attachments	Email with 3 attachments - Message (HTML)	
Open Quick Save Save All Remove Actions Attachments Attachments Attachment File name: Project Initiation Document.doc Size: 27 KB Author: tech3 Last changed: Monday, 23 March 2009 Message Project Initiation Document.doc	Select Copy All Selection Show Message (27 KB) Research Project xis (17 KB) Quen Quen Quick Print Save As Save All Attachments Remove Attachment Save All Attachment Save All Itachment Sopy Select All Copy Attachment(s) to SharePoint	
	Right Click – Copy to SharePoint	
© Copyright 2014 Scinaptic Con	nmunications Pty Ltd	Page 24 of 137

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.

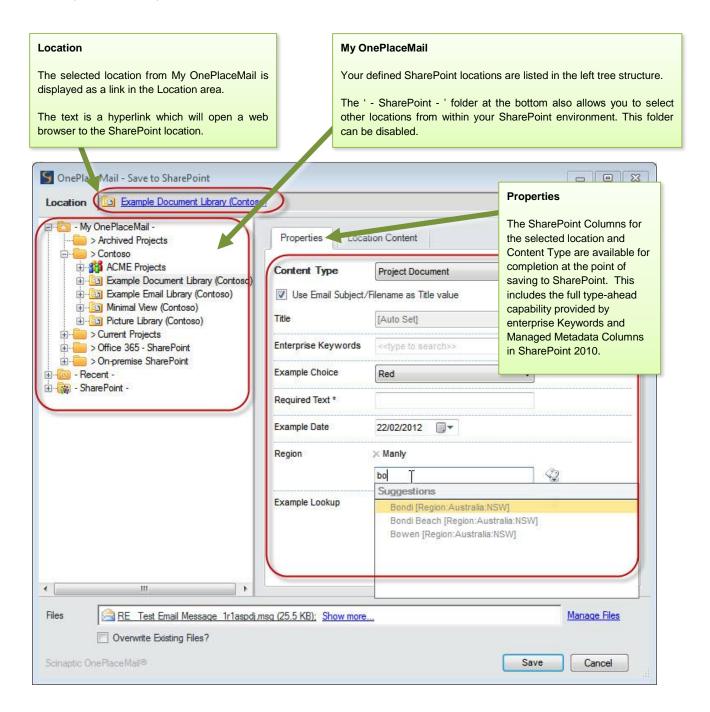
The Save to SharePoint window allows the completion of additional SharePoint metadata.

- My One PlaceMail -	Properties Loca	tion Content	
ACME Projects	Content Type	Project Document	•
	Vse Email Subject/	Filename as Title value [Auto Set]	
Current Projects Office 365 - SharePoint	Enterprise Keywords	< <type search="" to="">></type>	
	Example Choice	Red	•
- SharePoint -	Required Text *		
	Example Date	22/02/2012	
	Region	× Manly	
		bo T	- Q
	Example Lookup	Suggestions Bondi [Region:Australia:NSW] Bondi Beach [Region:Australia Bowen [Region:Australia:NSV	a:NSW]
iles RE Test Email Message 1r1aspdj.n	nsg (25.5 KB); Show more		Manage Files

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.



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.

		Location Content The Location content tab existing items in SharePo My OnePlaceMail.		
S OnePlaceMail - Save to SharePoi	int			
Location 01. Contracts				
- My OnePlaceMail -	F	Properties Location Conten	t	
Contoso ACME Projects	C	Name	Туре	Modified
Example Document Libr	ary (Contoso) 🖻	Email with 3 attachments_1r0	lhd4u.msg msg	21/02/2012 5:55:59 PM
Project 001		RE_ Project Initiat Repla	ce this item in ShareF	Point 2 5:56:02 PM
·····î 02. Corresponde ····î 03. Plans	ence	Use th	is item's properties a	s default
04. Financials			S	
⊡⊡ Project 002 ⊡⊡ Project 003				
Example Email Library (C Email Minimal View (Contoso)	Contoso)			
)			
Current Projects				
File	es			
⊕ - SharePoint - The	e Files area provid	es a list of the files being sa	ved to SharePoint	
The	e Manage Files lin	k provides the ability to rena	me files prior to sa	ving into SharePoint.
		Mail performs duplicate chewill not be saved to ShareP		
	eni to 5 people, it	will hot be saved to Sharer		cation 5 times.
	•			
Files	1r0lhckr.msg (299.5	<u>KB)</u>		Manage Files
Overwrite Existing File	s?			
Scinaptic OnePlaceMail®				Save Cancel

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.

G OnePlaceMail - Save to SharePoint		
Location 01. Contracts (oneplacemail.share)	ooint.com\sites\Contoso\Example Document Library\	<u>\Project 001)</u>
My OnePlaceMail - 	Properties Location Content	
·································	Name	Type Modified
	Email with 3 attachments_1r0lhd4u.msg	msg 21/02/2012 5:55:59 PM
i → - i → > On-premise SharePoint	RE_Project Initiation Document _PID	msg 21/02/2012 5:56:02 PM
01. Contracts (oneplacemail.sharepoint.c	PID.doc	doc 24/02/2012 2:27:52 PM
	Replace this item in SharePoint	
Tasks (oneplacemail.snarepoint.com/site Stample Email Library (Contoso)	Use this item's properties as de	ault :
	File / Attachment will be renamed to PID.doc	
Files Project Initiation Document.doc (23	<u>.5 KB)</u>	Manage Files
Overwrite Existing Files?		
Scinaptic OnePlaceMail®		Save Cancel

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

G OnePlaceMail - Save to SharePoint		
Location 01. Contracts (oneplacemail.sharepo	int.com\sites\Contoso\Example Document Library\	Project 001)
⊡ - My OnePlaceMail - 	Properties Location Content	
········· > Contoso ············· > Current Projects	Name	Type Modified
Office 365 - SharePoint	Email with 3 attachments_1r0lhd4u.msg	msg 21/02/2012 5:55:59 PM
:	RE_ Project Initiation Document _PID	msg 21/02/2012 5:56:02 PM
	PID.doc	doc 24/02/2012 2:27:52 PM
📴 Example Document Library (Contoso) Tasks (oneplacemail.sharepoint.com\site		
Example Email Library (Contoso) SharePoint - SharePoint Properties		83
Do you wish 'Properties' t	to use this item's properties as the default val ab?	ues in the
	Yes	No
Files PID.doc (23.5 KB)		Manage Files
Overwrite Existing Files?		
Scinaptic OnePlaceMail®		Save Cancel

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.

S OnePlaceMail - Save to SharePoint		
Location Calendar		
	Properties Loc	ation Content
	Content Type	Event
	Title *	RE: Project Initiation Document (PID) - F
- SharePoint -	Location	
	Start Time *	24/02/2012 8:38 AM
	End Time *	24/02/2012 8:38 AM
Example Document Library Example Email Library Form Templates Form Templates	Description	•
Winning view	Category	Specify your own value:
Files RE Project Initiation Document PIE	Review 1r159mnp.r	nsq (25.5 KB) Manage Files
Scinaptic OnePlaceMail®		Save Cancel
Bro	owse 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.

S OnePlaceMail - Save to SharePoint		
Location Calendar		
- My OnePlaceMail	Properties Location Content	
Current Projects Soffice 365 - SharePoint Soffice 365 - SharePoint	Content Type Event Title * RE: Project Initiation Doc	T COD L
	Title * RE: Project Initiation Doc	sument (PID) - F
	Start Time * 24/02/2012 8:38 AM	
🗄 📲 Minimal Vi	SharePoint connection?	<u>Test</u>
⊕-⊡ Picture Lit ⊕-⊡ Site Asset ⊕-⊡ Style Libra ⊕ Tasks	ОК (Cancel
Files RE Project Initiation Document PI	Review 1r159mnp.msg (25.5 KB)	Manage Files
Scinaptic OnePlaceMail®		Save Cancel

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.

S OnePlaceMail - Save to SharePoint		
Location 01. Contracts (oneplacemail.sharepo	int.com\sites\Contoso\Ex	ample Document Library\Project 001)
	Properties Loca	tion Content
	Content Type	Project Document
On-premise SharePoint Recent -	Title	RE: Project Initiation Document (PID) - F
01. Contracts (oneplacemail.sharepoint.c. Example Document Library (Contoso)	Enterprise Keywords	< <type search="" to="">></type>
Tasks (oneplacemail.sharepoint.com\site	Example Choice	Red
⊕ 🙀 - SharePoint -	Required Text *	
	Example Date	24/02/2012
	Region	× Manly
		< <type search="" to="">></type>
	Example Lookup	× SharePoint Conference Preparation
		< <type search="" to="">></type>
<		
Files RE Project Initiation Document PID	Review 1r159mnp.ms	sg (25.5 KB) Manage Files
Overwrite Existing Files?		
Scinaptic OnePlaceMail®		Save Cancel

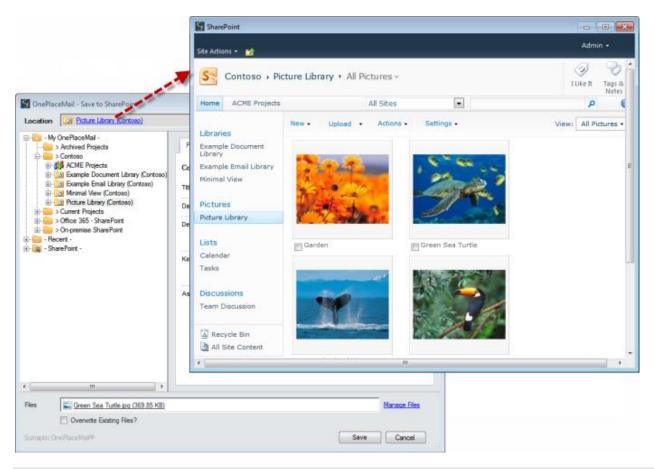
Save to a recent location

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.

Contractilist Save In Deservoid	(#1878)			
nates a bout Tourst dan Color				
M. Carlland Hari Schweit Regists Schweit Regists Schweit Regists Schweit Regists Schweit Regists Mark Mark Schweit Schweit Regists Schweit Regists S	Properties Location Groups Construct Fagues March Resource M [2] Use Stand External Tars Provided M Tars Provided M Changing Responde M M Standard Responde M M	\		
	tangk late 2000 g+ hap + bag H	Properties Loca	tion Content	
	Rever (Apple: Luitede 193)	Content Type	Project Document	•
Conversion Sector Presson Viewels	in the second	Vise Email Subject/	Filename as Title value	
	Restlicted to 7777-14	Title	[Auto Set]	
		Enterprise Keywords	<-type to search>>	
		Example Choice	Red	•
		Required Text *		
		Example Date	22/02/2012	
		Region	× Manly	
			boj Ţ	Q
		Example Lookup	Suggestions Bondi [Region:Australia:NSW] Bondi Beach [Region:Australia:NSW] Bowen [Region:Australia:NSW]	ISW]

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.

Content Type	Project Document	T
	Project Document	2
Fitle	Email Correspondence	
Enterprise Keywords	< <type search="" to="">></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.

Use Email Subject/Filename as Title value		
Title	[Auto Set]]
		1

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 **U** 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 (*).

G OnePlaceMail - Save to SharePoint						
Location Example Document Library (Contoso)						
	Properties Loca	tion Content				
∰ ACME Projects ⊕ ∰ Acmple Document Library (Contoso)	Content Type	Project Document -				
	☑ Use Email Subject/Filename as Title value					
⊕- ⊡ Picture Library (Contoso) ⊕- ⊃ Current Projects	Title	[Auto Set]				
	Enterprise Keywords	< <type search="" to="">></type>				
	Example Choice	Red				
⊞- 🙀 - SharePoint -	Required Text *	•				
	Example Date	24/02/2042 - Invalid Input				
	Region	× Manly				
		< <type have="" input.<="" invalid="" td="" you=""></type>				
	Example Lookup	< <type< td=""></type<>				
		ОК				
< •						
Files State Email with Pictures 1r0lhcls.msg	(2.01 MB): Show more	Manage Files				
Overwrite Existing Files?		, <u> </u>				
Scinaptic OnePlaceMail®		Save Cancel				

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.

OnePlaceMail - Save to SharePoint)		
		tion Content	
Contoso Contoso Contoso Contoso Contoso Contoso Contoso	Content Type	Project Document	•
Example Email Library (Contoso)	✓ Use Email Subject/	Filename as Title value	
ianimal View (Contoso) ianiani Picture Library (Contoso)	Title	[Auto Set]	
ierrie > Current Projects ierrie > Office 365 - SharePoint	Enterprise Keywords	fr	
		Suggestions	Create new
	Example Choice	ReFrance [Region]	Y
🥋 - SharePoint -	Required Text *	Friday [Weekdays]	
	Example Date	24/02/2012	
	Region	r Manly	
		< <type search="" to="">></type>	43
	Example Lookup	< <type search="" to="">></type>	
• III			
illes 📄 Test Email with Pictures 1r0lhcls.msg	(2.01 MB); Show more		Manage Files
Overwrite Existing Files?			
cinaptic OnePlaceMail®		(Save Cancel

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.

Required Text * Friday [Weekdays] Example Date 24/02/2012 Region Manly < <type search="" to="">></type>	Enterprise Keywords Example Choice	ReFrance [Region]	<u>Create new</u>
Example Date 24/02/2012	Required Text *	Friday [weekdays]	
Region Manly	Example Date	24/02/2012	
< <type search="" to="">></type>			
		< <type search="" to="">></type>	- Q

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Managed Metadata

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

G OnePlaceMail - Save to SharePoint					
Location Example Document Library (Contoso)	1				
	Properties Locat	tion Content			
ACME Projects Example Document Library (Contoso)	Content Type	Project Document			
🗈 🛅 Example Email Library (Contoso)	☑ Use Email Subject/Filename as Title value				
iter (Contoso) iter (Contoso) iter (Contoso)	Title	[Auto Set]			
ie internet Projects ie internet Proje	Enterprise Keywords	< <type search="" to="">></type>			
	Example Choice	Red			
⊞ 🩀 - SharePoint -	Required Text *				
	Example Date	24/02/2012			
	Region	× Manly			
		s 🖓			
	Example Lookup	Suggestions Sacramento [Region:USA:California]			
		Salt Lake City [Region:USA:Utah]			
		Seattle [Region:USA:Washington] Shoreline [Region:USA:Washington]			
		South Carolina [Region:USA:Washington] South Dakota [Region:USA:Washington]			
< •					
Files	(2.01 MB); Show more	Manage Files			
Overwrite Existing Files?					
Scinaptic OnePlaceMail®		Save Cancel			

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.

			Select: Region
			Please select a value from the options below Add New Item New Item: South Cardinal OK Caronal
🔄 OnePlaceMail - Save to SharePoint			New item: South Carolinal OK Cancel
Location Example Document Library (Contose	ù		* The new item will be created under the selected item in the tree below
- Contoso - Con	Properties Local	tion Content Project Document	Region Australia Denmak France
B-13 Example Document Library (Contoso) B-13 Example Enail Library (Contoso) B-13 Minimal Vew (Contoso) B-13 Picture Library (Contoso)	Use Email Subject/	Filename as Title value	- O New Zealand - O Norway - O UK
Current Projects Current Projects Current Projects Current Projects Current Projects Corporation SharePoint	Enterprise Keywords	<-type to search>>	ia-⊘ USA ⊕-⊘ Calfonia ——⊘ Texas
B B - Becent - B - B - SharePoint -	Example Choice	Red	⊕-⑦ Utah ⊡-⑦ Washington Coloredo
	Example Date	24/02/2012	Kngsgate Redmond Seatle *
	Region	X Manly	Select Cancel
	Example Lookup	<-type to search>>	
۲			
Files Cest Email with Pictures 1r0hcls.ms	2 (2.01 MB); Show more		Manage Files
Overwrite Existing Files?			
Scinaptic OnePlace Mail®			Save Cencel

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.

Example Lookup	s	ų					
	Suggestions	Suggestions					
	SharePoint Conference Preparation						
	SharePoint Las Vegas						
2.01 MB); Show more							

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.

Project Specification
OK Cancel

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.

Select lookup value Please search for or select values fr o create a new lookup item	om the options below	w
create a new pokup tem	S Create List Iter	m
pro	Content Type	13
	Task	-
Project Specification	Properties	Add >
	Title *	< Remove -
	Predecessors	< <type search="" to=""></type>
	Priority	(2) Normal 👻
	Status	Not Started
	% Complete	%
	Assigned To	
	Description	*
		*
	Start Date	2/03/2011
	Due Date	
	•	III
		Create Cancel Ca

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)

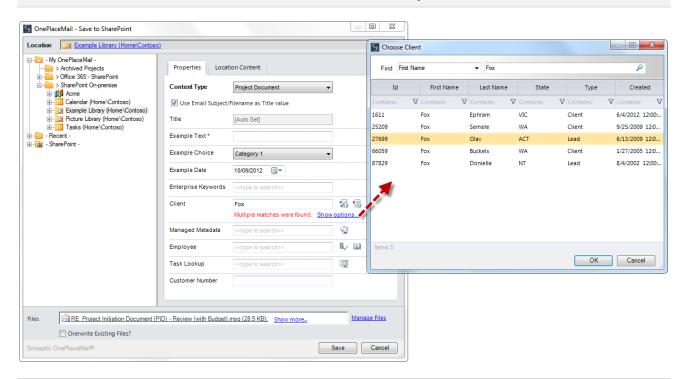
OnePlaceMail works with your existing SharePoint 2010 Business Connectivity Services (BCS) configuration. There is no additional configuration necessary. This screencast showing '<u>How to use Business Connectivity Services from within</u> <u>Microsoft Outlook</u>' demonstrates OnePlaceMail using an 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.

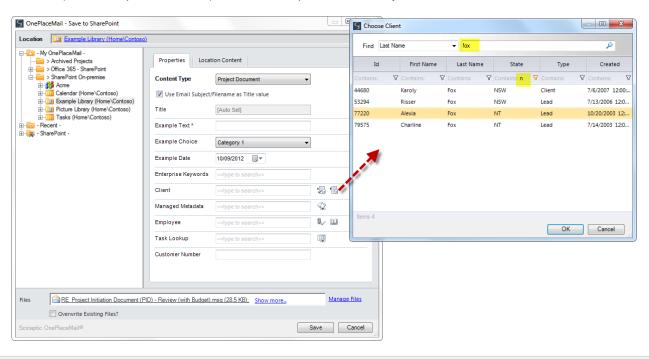
Client	Fox	5
	Multiple matches were found.	Show options

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.

Share Point -	Properties Locati	Project Dacument		tec Display Name Contains: V	Department	Title	Email	P Account Name
SharePoint On premise SharePoint On premise SharePoint OnevContoso) SharePoint OnevContoso) SharePoint - SharePoint -	♥ Use Email Subject/I Title Example Text *	Filename as Title value		Display Name			Email	
Galendar (Home Contoso)	Title Example Text *						Email	Account Name
Gring Picture Library (Home Contoso) T Gring Tasks (Home Contoso) Gring Tasks (Home Contoso) Gring - Ecent - E S - Share Point - E	Example Text *	[Auto Set]		Contains: 🛛 🗸				
3 - Recent - E					Contains:	Contains:		Contains:
For the second secon				scinaptic\tech2			tech2@SCINAPTIC	SCINAPTIC\tech2
	Example Choice			scinaptic\tech7			tech7@SCINAPTIC	SCINAPTIC\tech7
E		Category 1 👻		tech1			tech1@SCINAPTIC	SCINAPTIC\tech1
	Example Date	10/09/2012		tech10			tech10@SCINAPTIC tech11@SCINAPTIC	
	Enterprise Keywords			tech12			tech12@SCINAPTIC	
				tech13			tech13@SCINAPTIC	
c	Client	< <type search="" to="">></type>	5	tech14			tech14@SCINAPTIC	
N	Managed Metadata	< <type search="" to="">></type>	¢2	tech3			tech3@SCINAPTIC	SCINAPTIC\tech3
E	Employee	× scinaptic\tech7	1	tech4			tech4@SCINAPTIC	SCINAPTIC\tech4
		tec	8/ DI					
		Multiple matches were found. Show	options	Items 10				
т	Task Lookup	< <type search="" to="">></type>	ų				ОК	Cancel
	Customer Number			-				
RE Project Initiation Document (PID) -	Review (with Budget).	msg (28.5 KB); Show more	Manage	Files				
Overwrite Existing Files?								
aptic OnePlaceMail®			Save C	Cancel				

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.

ion Example Library (Home\Contos	01			G Choose Employee	2			
· My OnePlaceMail - → Archived Projects → Office 365 - SharePoint	Properties Locat	tion Content		tec				P
	Content Type	Project Document		Display Name	Department	Title	Email	Account Nar
Calendar (Home\Contoso)	Use Email Subject,	/Filename as Title value		Contains: 1	Contains: ি	Contains:	V Contains: V	Contains:
⊕ ⊡ Picture Library (Home\Contoso)	Title	[Auto Set]		tech1			tech1@SCINAPTIC	SCINAPTIC\tech
ia - IIII Tasks (Home \Contoso) - Recent -	Example Text *			tech10			tech10@SCINAPTIC	SCINAPTIC\tec
- SharePoint -	Example Choice	Category 1		tech11 tech12			tech11@SCINAPTIC tech12@SCINAPTIC	SCINAPTIC\tec
	· · · · · · · · · · · · · · · · · · ·			tech13			tech12@SCINAPTIC	SCINAPTIC\tech SCINAPTIC\tech
	Example Date	10/09/2012		tech14			tech14@SCINAPTIC	
	Enterprise Keywords	< <type search="" to="">></type>						
	Client	< <type search="" to="">></type>	56					
	Managed Metadata	< <type search="" to="">></type>	¢j	F				
	Employee	× scinaptic\tech7	1					
		< <type search="" to="">></type>	8/ 11 🗸	Items 6				
	Task Lookup		ų				ОК	Cancel
	Customer Number							
RE Project Initiation Document (PID) - Review (with Budget)	msg (28.5 KB); Show more	Manage	Files				
Overwrite Existing Files?								

People and Groups – Search, Sort and Refine

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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.

Files RE Business Requirements Workshop vf0bq5.msq (30 KB); 🚔 process documents vf0aqo.msq (77.5 KB); Show more	Manage Files
Overwrite Existing Files?	
Scinaptic OnePlaceMail®	Save Cancel

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.

S N	Aanage Files to Save		• 🔀
1.	Test Email with Pictures_1r0lhcls		.msg
2.	Project Requirements Workshop_1r0lhcr5		.msg
3.	Email with 3 attachments_1r0lhd4u		.msg
		ОК	Cancel

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 ¹ mark 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.

ŀ		
	Files 🛛 🚔 RE_Business Requirements Workshop vf0bq5.msq (30 KB); 🚔 process documents vf0aqo.msq (77.5 KB); Show more	Manage Files
	Overwrite Existing Files?	
	Scinaptic OnePlaceMail® Sav	e Cancel
Ľ		

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.

				Find location in http://appserver-2013/contoso/Legal Mat
				🕀 📴 03. Closed Matters
5	OpePlaceMail - 1	iave to SharePoint		😑 🛅 04. All Matters
Location and Mater 2000	/			🌾Clear Filter: ' 77'
Red location in http://apprenver/2013/contoes/Cegal Mat 👂	Properties Loca	tion Content		
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Nes RE EDRMS Project 1r42dfb.mag (151)	(B): CARE EDRMS Proje	ect 1/42e5o3.mag (80.5 KB)		Managerites
Overwrite Existing Riles?				
Scinaptic OnePlaceMail®				Seve Cancel

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.

S OnePlaceMail - Settings – 🗆 🗙
My SharePoint Outlook Preview Site Mailboxes Save Search Launch Credentials Proxy Licensing
Recent Locations Image: Show Recent Locations in Navigation Tree Recent Locations Tracked: 10 Clear Recent Locations
Location Search
The search service associated with the following site collection is used for farm wide search: First site collection added (default)
O Specific site collection http://appserver-2013
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

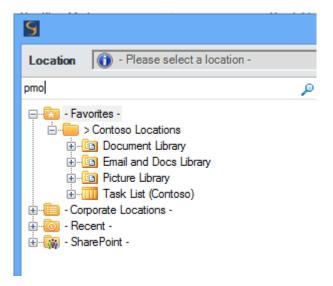
Settings for Location Filtering

1.3.10 Navigation Tree - Search locations

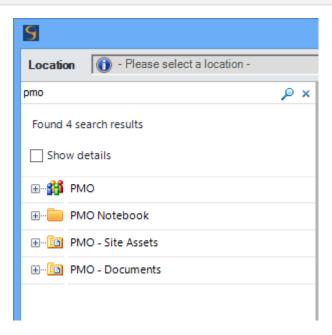
The navigation tree search uses the powerful enterprise search and indexing capabilities of SharePoint, allowing the user to efficiently find a location within SharePoint. For example, you can search for a site, library, document set and/or folder.

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	Type	a	sear	ch	a	uerv
---------------------	------	---	------	----	---	------



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.

9		OnePlaceMail -	Save to Sha
Location 04. All Matter	<u>s</u>		
Find location in http://appserver-2	hent hent ters rs Location: 04. All Matters Open in web browser New Refresh	Properties Loc Content Type Use Email Subject Title	ation Content Email Corre t/Filename as [Auto Set]
	Right-C	lick – New	

5	OnePlaceM	ail - Save to SharePoint		- 🗆 ×
Location 04. All Matters				
Find location in http://appserver-2013/contoso/Legal Ma	Properties	Location Content		
	5	OnePlaceMail - Create	new item 🛛 🗖 🗙	
	Content Type	Legal Matter	~	
Matter 07777 Matter 08888	Title *			
Matter 00001 Matter 00002	Matter Status	New	¥	
Matter 00003 Matter 00004	Matter No			
Matter 00005 Matter 00006	Matter Type	Partnership	~	
	Description		~	
	Matter Team	< <type search="" to="">></type>	Save Cancel	
Files RE EDRMS Project 1r42dtfo.msg (1	51 KB); 🚖 RE EDRM	S Project 1r42e5o3.msg (80.5 KB)	1	Manage Files
Overwrite Existing Files?				
Scinaptic OnePlaceMail®			Sav	/e Cancel

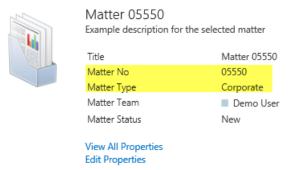
Create a new Document Set / Folder

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 supressed from the Save to SharePoint user interface. This removes confusion when completing metadata upon saving content into a document set.

Matter Management Matter 05550

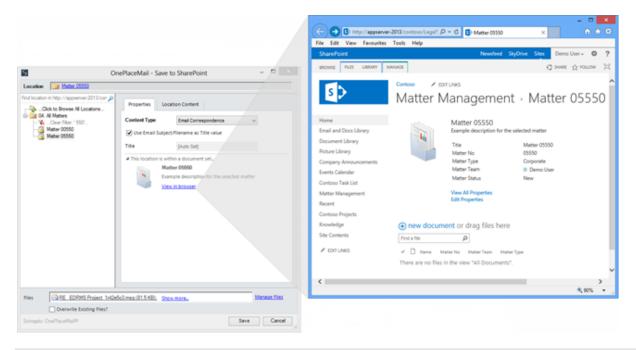


SharePoint document set - with 2 columns being synchronized down/stamped on new items

S 01	nePlaceMail - Save	to SharePoint	- 🗆 🗙
Location Matter 05550			
Find location in http://appserver-2013/contosc 🔎	Properties Locat	tion Content	
	Content Type	Project Document V	
Matter 05550	 Use Email Subject, 	/Filename as Title value	
	Title	[Auto Set]	
	Example Choice	Green 🗸	
	Example Date	11/04/2014	
	Select Person	< <type search="" to="">></type>	\$√ 10
	Example Number		
	Project Location	×Nevada	
		< <type search="" to="">></type>	¢
	Client	< <type search="" to="">></type>	5 B
	Associated Task	< <type search="" to="">></type>	
	Enterprise Keywords	< <type search="" to="">></type>	
	Description	^	
		¥	
	Exam	in a document set er 05550 ple description for the selected matter in browser	
Files RE EDRMS Project 1r42e5o3.m	sa (81.5 KB): Show ma	Ire	Manage Files
Overwrite Existing Files?	<u>og (ono no),</u> <u>priow mo</u>	<u>11 C.m.</u>	
Scinaptic OnePlaceMail®			Save Cancel

Save to SharePoint Window – with document set columns suppressed

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





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

S OneP	PlaceMail - Save to S	iharePoint 🗖 🗖 🗖	
- Save R	lesults		
V	View	Test Email with Pictures_1r0lhcls.msg	
V	View	Project Requirements Workshop_1r0lhcr5.msg	
×		https://oneplacemail.sharepoint.com/sites/Contoso/Example Document Library/Email with 3	
		File already exists in SharePoint	
Scinaptic	c OnePlaceMail®	Close	4

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

auta View	Test Email with Pictures_1r0h	cla mag		
View	Project Requirements Worksh	op_1r0hcr5.msg		
	https://oneplacemail.sbarepo	nt.com/sites/Contoso/Example	Document Library/Final with 3	
	Site Actions 🕶 😏 Brow	vse Edit		Admin •
OnePlaceMail®	Save Cancel Paste	K Cut Copy Delete Item		
	Commit Clipt	oard Actions		
	Libraries	Content Type	Project Document	
	Example Document Library	Name *	Project Requirements Workshop_1r0lhc.msg	
	Example Email Library	Title	Email with 3 attachments	
	Minimal View	Enterprise Keywords	Enterprise Keywords are shared with other users ar ease of search and filtering, as well as metadata co	
	Pictures	Example Choice	Red 💌	
	Picture Library	Required Text * cxc	CXC	
	Lists	Example Date	2/24/2012	
	Calendar	Region	Manly;	0
	Tasks	Example Lookup	AGM 2012 SharePoint Conference (
	Discussions		SharePoint Las Vegas Add >	
	Team Discussion		< Remove	
	Recycle Bin			
	All Site Content		L	-
		Created at 2/24/2012 4:38 Last modified at 2/24/2012		Cancel

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.

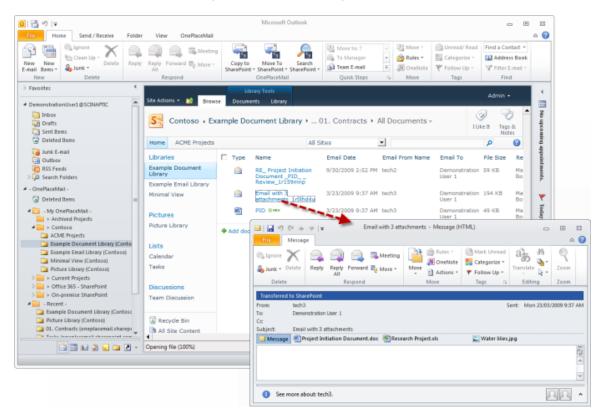
Emails can be opened from SharePoint into Outlook by selecting the yellow mail 'Type' icon (SharePoint 2007) or the filename link in SharePoint 2010.

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 Download X Do you want to open or save this file? To view attachments and the email body click on the mail icon. Name: RENAME.msg The File Download Window may appear. It allows you to open Type: Outlook Item, 60.5KB or save the selected email message. From: vs-server39 Click Open to open and view the message and its attachments Open Cancel Save directly within Outlook. Always ask before opening this type of file While files from the Internet can be useful, some files can potentially Tip: Deselect 'Always ask before opening this type of file' 2 harm your computer. If you do not trust the source, do not open or save this file. What's the risk? File open window

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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.

Howe Send / Receive Folder	View	OnePlaceMail	Microsoft Outlook			
en New New Series - Series - Delete New Delete	Repy For M Repy		More To Search And Search Stars Contraction Contractio	Mayer Mayer	Averaal/ Categorier Pollow Road	Contact + dress Book ar Extent + Find
favoritas 4	1	Library Totals				10000
DemonstrationUserL@SCINAPTIC	Brawse	Donuments Library				Admin *
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RSS Feeds	3	7/21/2011 11:57 PM	RE_Test123_1r2rk9ql	Demonstration User 1	Demonstration User 1	43 KD
GG Search Folders		4/27/2010 9:53 AM	Test Sending Email_trtmp7()	Oemonstration User 2	Demonstration User 1	62 KB
OnePlaceMed -		3/9/2010 12:11 AM	Project AD001 _ Specification_1r1/dn2	Semanatration User 1	Demonstration User 1	2501.905
@ Deleted Remo	a	2/17/2010 9:30 AM	RE_ Example Ernal_1/10040	Demonstration User 2	Demonstration User 1	64 43
- My OnePlaceMai -		1/22/2010 6:47 AM	R5_ Project Initiation Document _PID Review_InitialSha	Demonstration User 2	Demonstration User 1	52 (05
Archived Projects Contoco		12/15/2009 #110 PM	RE_ Project Initiation Document _PID Review1r1bi450	Demonstration User 2	Demonstration User 1	52 KB
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Example Document Library (Contoos) Example Email Library (Contoos)	0	11/25/2009 6/58 AM	RE_Project Initiation Occument_PIDReview_1r19v0s4	Demonstration User 1	techt) Demonstration User 1	54 #8
Minimul View (Contosis)	3	11/13/2009 7:09 AM	Example Email_tridepkg	Demonstration User 1	Demonstration User 1	46.405
Picture Library (Contoxo)	0	9/30/2009-3:49 PM	RE_ Project Initiation Document _PID Review1r199x37	beth2	Demonstration User 1	50 KB
 Current Projects 	3	9/30/2009 2:54 PH	RE_ Project Initiation Document _PID Review_1/159mt0	tautt1	Demonstration User 1/ tech2	56 KB
Office 385 - SharePoint On-premise SharePoint	-	3/23/2009-9:39 AM	Upcoming project_1/Dihd9c .	techil	Demonstration User 1	73.45
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Example Document Library (Contore) Michae Library (Contore) Or. Contract (Englishment) American (Englishment) Tasks (Englishment) (Englishment) (American) Superficient (Englishment) (Contore) -My (OriePlaceMail (Recovered File) - Search Order	• Ada do	current.				

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).

0 📑 🤊 🗸	Inbox - DemonstrationUser1@SCINAPTIC - Microsoft Outlook	_	E 53
File Home Send / Receive Folde	View OnePlaceMail		۵ 🕜
New New E-mail Items * New Delete	Image: Copy to SharePoint + SharePoint	ess Book E-mail ▼	
Favorites	Respond OnePlaceMain Quick steps 1% Move 1ags Fin	IU	
V Favorites	Search Inbox (Ctrl+E)		<mark>ک</mark> <
DemonstrationUser1@SCINAPTIC	🖾 !! 泣 🗅 @ Received 🔺 From Subject Categories	Size N	? 🔺 🔳
🖂 Inbox	🚖 🛛 Mon 23/03/2009 9:2 tech3 Test Email Message	281 KB	~ <mark>8</mark>
Drafts	🚖 🛛 Mon 23/03/2009 9:2 tech3 Test Email with Pictures	2 MB	र ह
🔁 Sent Items	🚖 Mon 23/03/2009 9:3 tech3 Project Requirements Workshop	5 KB	7
Deleted Items	🚖 🕘 Mon 23/03/2009 9:3 tech3 Email with 3 attachments	37 KB	upcoming appointments
Junk E-mail	🚖 🕘 Mon 23/03/2009 9:4 tech3 Upcoming project 📲 Transferred to SharePoint	33 KB 🛛 🕅	2 월
Outbox	🙈 Wed 30/09/2009 2:5 tech2 RE: Project Initiation Document (PID) - Review 📳 Transferred to SharePoint	1	₹ Din
RSS Feeds	🙈 Wed 30/09/2009 2:5 tech1 RE: Project Initiation Document (PID) - Review 🚺 Transferred to SharePoint		🚩 tine
Search Folders	Wed 30/09/2009 3:4 tech2 RE: Project Initiation Document (PID) - Review (with		
4 - OnePlaceMail - ■	Fri 13/11/2009 7:10 Demonstration User 1 Example Email		2
Deleted Items	Thu 26/11/2009 6:59 Demonstration User 1 RE: Project Initiation Document (PID) - Review		2 🛛
	A Mon 7/12/2009 1:56 Demonstration User 2 RE: Test Email Message	10 KB	
4 🔯 - My OnePlaceMail -	Tue 15/12/2009 4:10 Demonstration User 2 RE: Project Initiation Document (PID) - Review (with	14 KB	Today:
> Archived Projects	Eri 32/01/2010 6:47 Demonstration Liker 2 DEs Droiset Initiation Decement (ND) Deviau	17 49 1	
 Contoso ACME Projects Example Document Library (Conto Example Email Library (Contoso) 	Email with 3 attachments tech3 Transferred to SharePoint		Tasks
Minimal View (Contoso)	ent: Mon 23/03/2009 9:37 AM		
Picture Library (Contoso)	Io: Demonstration User 1		
D > Current Projects	Message Project Initiation Document.doc (27 KB) 🕮 Research Project.xls (17 KB) 📓 Water lilies.jpg (86 KB)		
D > Office 365 - SharePoint			
On-premise SharePoint			
4 🔯 - Recent -			-
🔁 Example Email Library (Contoso)			
	See more about: tech3.	$\mathcal{A}\mathcal{A}$	^
Items: 17	This folder was last updated on 4/08/2011. 🔥 Disconnected 🛛 🖽 100% 🝚		

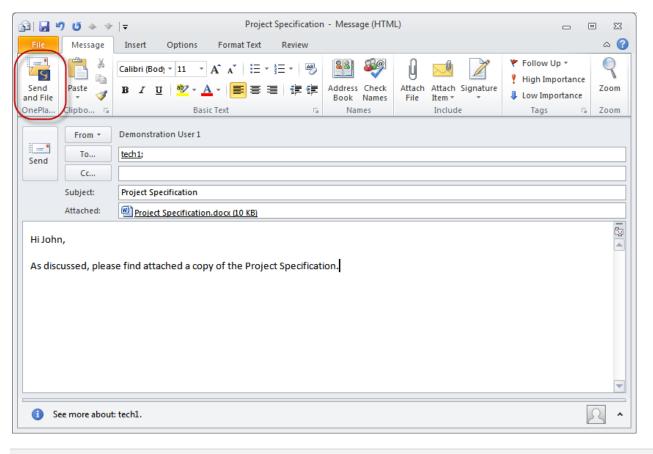
'Transferred to SharePoint' Category - Showing email messages successfully saved into SharePoint

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.

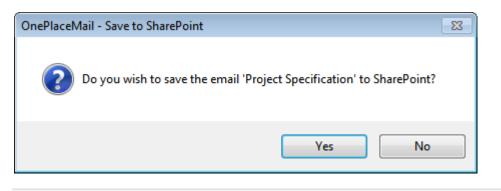
1.7 Automatically Prompt to Save on Send

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

Project Specification - Message (HTML)								ο <u>Σ</u> 3		
File	lessage Insert	Options	Format Text Revi	ew						۵ 🕜
Send Pas		iody v 11 v A <u>U</u> <mark>∎2</mark> v <u>A</u>	、▲、│ ≔ → う言 → → │ ■ ■ ■ ∰	E 🚈 Add	ress Check		ttach Signature	 Follow Up High Impo Low Impor 	rtance	Zoom
OnePla Clip	bo 🖫	Basic T	ext	G	Names	I	Include	Tags	Es.	Zoom
Send	To <u>tech1;</u> Cc	ration User 1								
Atta	ached: 🗾 🖭 Proje	ect Specification.d	locx (10 KB)							
Hi John, As discusse	ed, please find at	tached a copy (of the Project Spe	cification.						
 See mo 	ore about: tech1.									2 •

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.

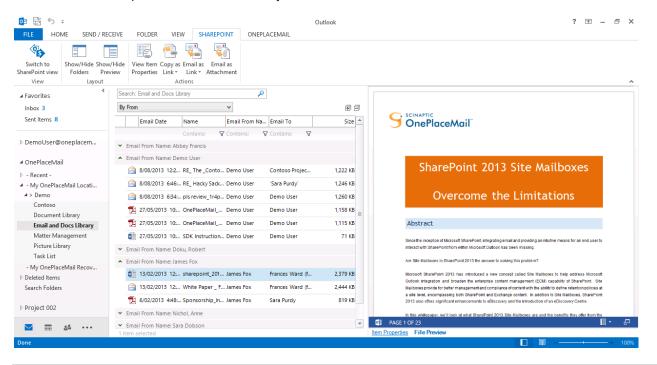


User Prompt asking to save a sent email into SharePoint

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'.

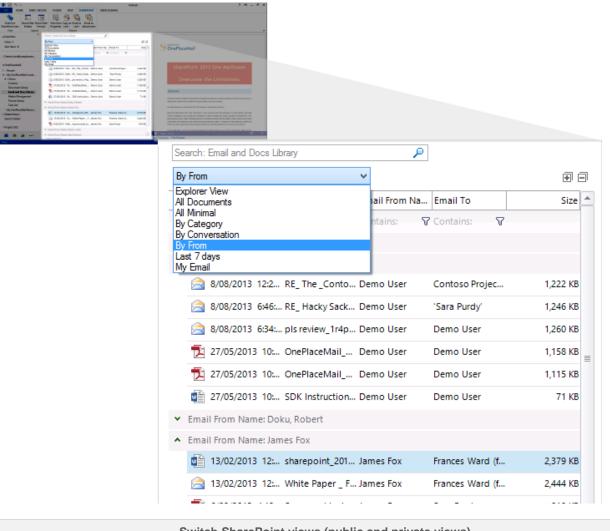


OnePlaceMail: Outlook Style Interface of SharePoint content

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.

Se	arch: Email and Docs Libr	ary	ρ	\sim				
By	/ From		•		+ -			
	Email Date	Name	Email From Na	Email To	Size			
		Cont 📶 🗸	Contains: 🛛 🖓	Contains: 🛛 🖓				
^	Email From Name: Dem	io User						
	27/05/2013 10:	SDK Instruction	Demo User	Demo User	71 KB			

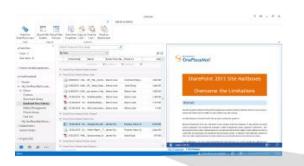
			Filter view	v content	
Sear	ch: Email and Docs Lib	rary	P		
By F	rom	1	~		
	Email Date	Name	Email From Na	Email To	Size
		Contains: sd 🛛 😽	Contains:	Contains:	8
∧ E	mail From Name: Den	no User	No filter		
	27/05/2013 10:	SDK Instruction	 Contains 	ser	71 KB
			Does not cont	ain	
			Starts with		
			Ends with		
			Equals		
			Not equal to		
			ls null		
			ls 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

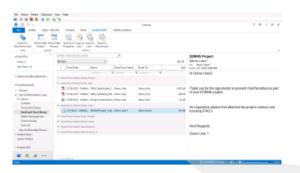




Document/File Preview using Office Web Apps

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.

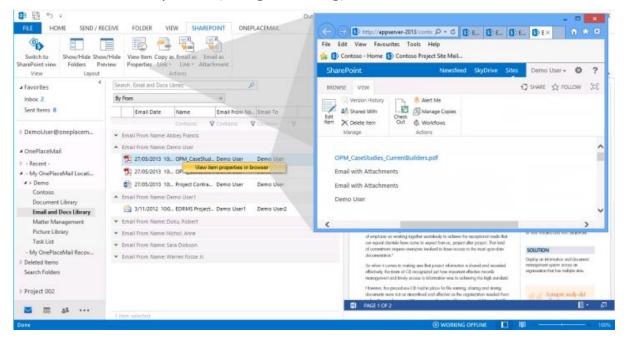


EDRMS Project
Demo User1
To: Demo User2
Sent: 3/11/2012 9:00 PM
Hi Demo User2,
Thank you for the opportunity to present OnePlaceMail as part
of your EDRMS project.
As requested, please find attached the project contract and
licensing FAQ's
Kind Regards,
Demo User 1
Preview email messages

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

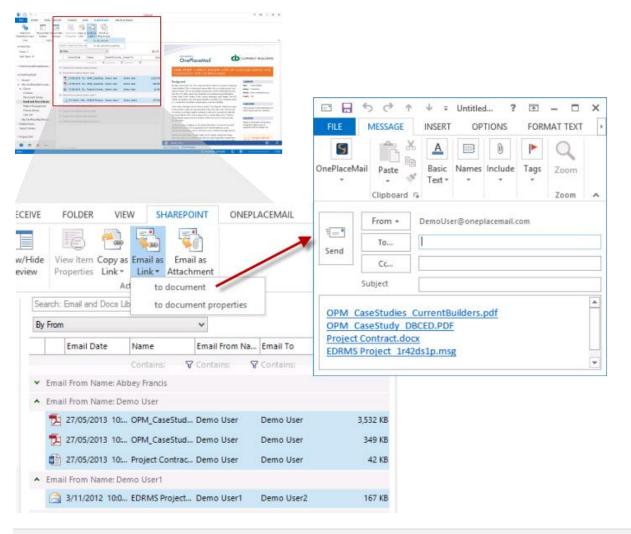
1.12 Actions: Insert as Link/Attachment from SharePoint, View Properties

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.



Insert selected items as Links

1.12.2 Email as Attachments

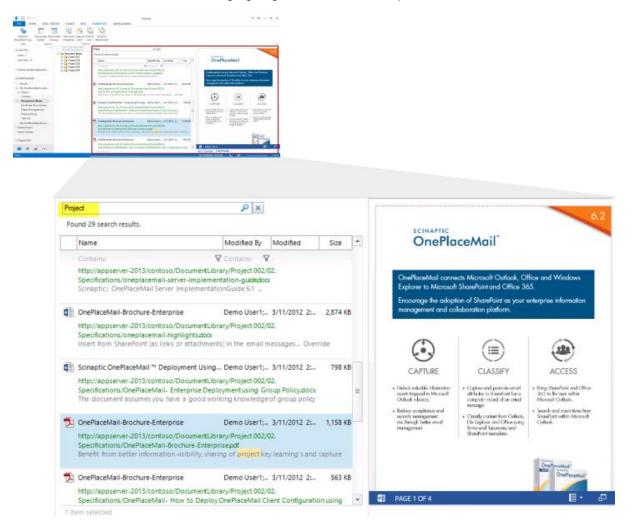
There are circumstances where sending content from SharePoint as an attachment is required. OnePlaceMail allows you to use the 'Email as Attachment' for one or more selected items.

Sections for Park Section (Section (Sec	
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OnePlaceMail Paste Basic Names	Include Tags Zoom
* • * Text* *	· ·
Clipboard 🕫	Zoom 🔺
We can't show MailTips right now.	
	la come il come
From - DemoUser@onep	lacemail.com
CEIVE FOLDER VIEW SHAREPOINT ONEPLACEMAIL To	
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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.

- Large folder structures from SharePoint are consideration 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.

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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.

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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.

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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.

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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.

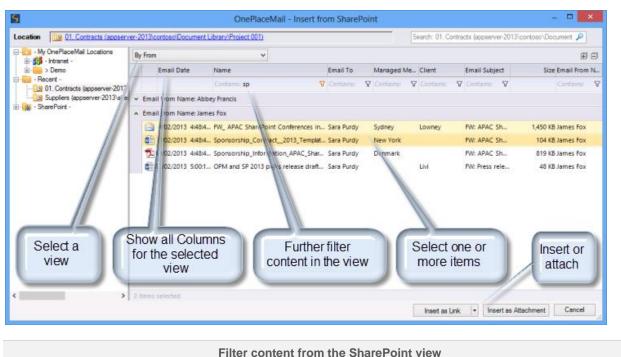
From a draft/reply email message, select 'Insert from SharePoint'.

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.

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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.



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 usinf 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.

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Search SharePoint from the Insert window

1.19 Filter and Sort Content

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

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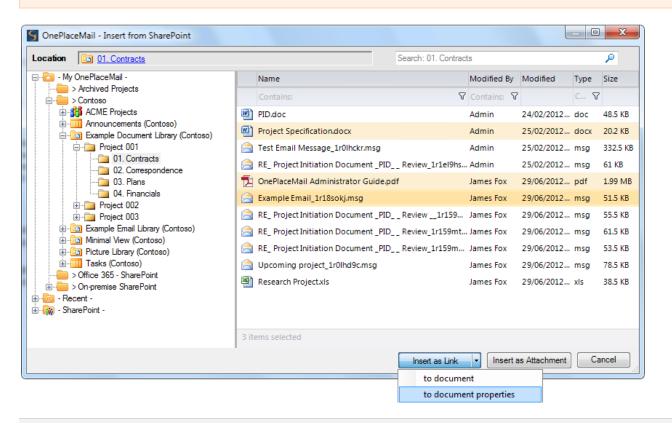
1.20 Link directly to Document

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.

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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)
- 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.

si 🔒 🤊	じ	- -	RE: Project Initiation Document (PID) - Review (with Budget) - Message (HTML)	_	• %
File	Message	Insert Optio	ons Format Text Review		۵ (?
Send and File OnePlaceMa	Paste	 K Cut Topy ✓ Format Painter ipboard ☑ 	Calibri (Bod) ~ 11 ~ A A K Ξ ~ Ξ ~ ∞ Image: A A A K Ξ ~ Ξ ~ ∞ Image: A A A K Ξ ~ Ξ ~ ∞ Image: A A A K = K = K = K = K = K = K = K = K	Zoom Zoom	
	not respond	ding to the latest me Demonstration Us	ssage in this conversation. Click here to open it. er 1		
Send	То Сс	tech2	/		
	Subject:	RE: Project Initiati	on Document (PID) - Review (with Budget)		
Hi Jane, Please fi		elow to the Proje	ect Specification OnePlaceMail - Save Attachment to SharePoint		
Sent: W To: Dem Subject:	rednesday, nonstration : RE: Proje	ct Initiation Docur	Do your with to cave Project Specification door to ShareDoint?		
	onstration ttached th	User 1, e reviewed budg	et ir No		
Regards, Tech2	,				

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**.

S OnePlaceMail - Save to SharePoint		
My OnePlaceMail - Archived Projects	Properties Loca	tion Content
⊖ → Contoso	Content Type	Project Document
Project 001	Title	Project Specification
02. Correspondence 03. Plans	Enterprise Keywords	< <type search="" to="">></type>
04. Financials ⊕ Project 002	Example Choice	Red
	Required Text *	Example Text
iaian Minimal View (Contoso) iaian Picture Library (Contoso)	Example Date	25/02/2012
	Region	◆ February 2012 →
i≟iiii > On-premise SharePoint ⊞iiii > Recent -		Mon Tue Wed Thu Fri Sat Sun 30 31 1 2 3 4 5 6 7 8 9 10 11 12
ia⊡iiii - iiiiiiiiiiiiiiiiiiiiiiiiiiiiii	Example Lookup	6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26
		27 28 29 1 2 3 4 5 6 7 8 9 10 11
		Today: 25/02/2012
Files Project Specification.docx (9.65 KB)		Manage Files
Overwrite Existing Files?		
Scinaptic OnePlaceMail®		Save Cancel

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.

à 🛃 🖌	ባ 🧿 🔺		RE: P	roject A0001 - Specifi	cation - Message (HTML)		
File	Message	Insert	Options Format Text	Review				۵
	nsert from	Paste	Calibri (Bod) $\stackrel{\checkmark}{}$ 11 $\stackrel{\checkmark}{}$ A $\stackrel{\checkmark}{}$ B I \underline{U} $\stackrel{\texttt{ab}?}{=} \stackrel{\checkmark}{\sim}$ \underline{A} $\stackrel{\checkmark}{=}$		Address Check Book Names	Attach Attach Signature File	 Follow Up High Importance Low Importance 	Zoom
OnePla	aceMail (lipboard 🗔	Basic Text	Gi Gi	Names	Include	Tags 🗔	Zoom
Send	Cc Subject:	RE: Project A	0001 - Specification					
Projec OnePla	cussed, plea t Specificat aceMail Ad							

Email with link to attachment in SharePoint

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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
Please select the location to recover the 1 item(s) that were not saved to SharePoint:
Currently Active Folder - Inbox - My OnePlaceMail (Recovered Files) -
ОК



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.

0 📑 🄊 🖃						Inbox -	Demonstration	User1@SCIN/	APTIC - Microsoft Out	look
File Hor	me Send / Receive	Folder	View	OnePlaceMail	1					
New New E-mail Items •	lgnore to Clean Up ▼ to Sunk ▼	Reply	Reply Forwa	Meetir	g	Copy to SharePoint	Move To SharePoint •	Search SharePoint *	Move to: ? Team E-mail Reply & Delete	 ➡ To Manage ✓ Done ➡ Create Nev
New	Delete		Respon	d		Recent				eps
 Favorites Demonstration 	onUser1@SCINAPTIC	<	 ¤!!⊅⊡©	Received			(oneplacemail. ple Email Librar		m\sites\Contoso\Lists)	
🖂 Inbox	-			Mon 23/03/2	009	Exam	ple Document I	library (Conto	so)	ssage
Drafts) 😒	Mon 23/03/2	009	Selec	t SharePoint Io	cation		h Pictures
🔁 Sent Ite	ms (1)			Mon 23/03/2	009	9:32 AM	tech3		Project Re	quirements Worl
Deleted	Items (8)		20	Mon 23/03/2	009	9:37 AM	tech3		Email with	3 attachments

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

<u> </u> <u>-</u> י ו ד		- DemonstrationUser1@SCINAPTIC - Mi
File Home Send / Receive Folde	View OnePlaceMail	
🚰 🔚 🖏 Ignore	👰 🚘 🕮 Meeting 😽	S S S S S S S S S S S S S S S S S S S
New New E-mail Items * & Junk *	Reply Forward More - Copy to All SharePoint	
New Delete	Respond	OnePlaceMail
Favorites		
DemonstrationUser1@SCINAPTIC	🖾 🕂 🏠 🕲 Received 🛛 🐣	From
🖂 Inbox	📄 🛽 Mon 23/03/2009 9:29 AM	tech3
Drafts	📄 🛛 Mon 23/03/2009 9:29 AM	tech3
🔁 Sent Items (1)	Mon 23/03/2009 9:32 AM	tech3
Deleted Items (8)	🖂 🕖 Mon 23/03/2009 9:37 AM	tech3
🐻 Junk E-mail	🚔 🕖 Mon 23/03/2009 9:40 AM	tech3
🔁 Outbox	Wed 30/09/2009 2:52 PM	tech2
🐻 RSS Feeds	Wed 30/09/2009 2:55 PM	tech1
Dip Search Folders	🖂 Wed 30/09/2009 3:49 PM	tech2
DemonstrationUser2@SCINAPTIC	Fri 13/12/2009 7:10 AM	Demonstration User 1
4 - OnePlaceMail -	Thu 26/11/2009 6:59 AM	Demonstration User 1
Deleted Items	Mon 7/12/2009 1:56 PM	Demonstration User 2 Demonstration User 2
	Er: 22/01/2010 5:47 AM	Demonstration User 2
 My OnePlaceMail - Archived Projects Contoso Current Projects 	RE: Project Initiation Docum tech1	ent (PID) - Review
 > Office 365 - SharePoint > On-premise SharePoint 	Follow up. Start by Monday, 12 Octob You forwarded this message on 7/12/2	er 2009. Due by Monday, 12 October 2009 009 1:31 PM.
 Complementation of the second s	Sent: Wed 30/09/2009 2:55 PM To: Demonstration User 1; tech2 Cc: tech3	
 Example Email Library (Contoso) Example Document Library (Contoso) 	Cc tech3 Hi Demonstration User 1/Tech2.	

Drag / Drop to Recent Locations

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

		Microsoft Out	tlook		
File Home Send / Receive Folder	View OnePlaceMail				
New New E-mail Items - New New C-lean Up - New New Delete	Reply Forward to More ~ Respond	Copy to Move To Search SharePoint * SharePoint * SharePoint * OnePlaceMail	Move to: ? Team E-mail Reply & Delete Quick	To Manager ✓ Done ✓ Create New ✓ Steps	Move × Move × Move
Favorites		^{brary} ample Document Library + (01. Contracts • A	All Minimal -	
Deleted Items	Home		All s	iites 🔻	
 Image: A with the second second	Type Email Date	Name 2 PM RE_Project Initiation Documen Review_Ir159mnp III MW	,		rom Name Ema Den 1
 Minimal View (Contoso) Picture Library (Contoso) 	3/23/2009 9:3	7 AM Email with 3 attachments_1r0lh	d4u ≅new	tech3	Den 1
D > Current Projects D > Office 365 - SharePoint	🖶 Add document				
Do-premise SharePoint SharePoint SharePoint SharePoint SharePoint.com\sit Tasks (oneplacemail.sharepoint.com\sit Example Email Library (Contoso)					

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)

S OnePlaceMail - Save to SharePoint			- • •
Location Example Document Library (Contoso)			
- My OnePlaceMail - Archived Projects	Properties Loca	tion Content	
ia⊶iiii > Current Projects ia⊶iiiii > Office 365 - SharePoint	Content Type	Project Document	•
	Use Email Subject/	/Filename as Title value	
Recent - Tasks (oneplacemail.sharepoint.com\sites\Conto: Example Email Library (Contoso)	Title	[Auto Set]	
Example Document Library (Contoso)	Enterprise Keywords	< <type search="" to="">></type>	
HerePoint https://oneplacemail.sharepoint.com/sites/0	Contoso/Example Documen	t Library	•
	Required Text *		
	Example Date	21/02/2012	
	Region	× Manly	
		< <type search="" to="">></type>	- Ca
	Example Lookup	< <type search="" to="">></type>	
4			
Files RE Project Initiation Document PID Re	eview 1r159mt0.msg (33 KE	3); Show more	Manage Files
Overwrite Existing Files?			
Scinaptic OnePlaceMail®		Save	Cancel

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)

0 📑 🧐 ↓ File Home Send / I	Receive Folder	Inbox - DemonstrationUser1 View OnePlaceMail	@SCINAPTIC - M	licrosoft Outlook				_ 0	83 2 a
New New E-mail Items *	Reply Reply All Forward	← Copy to Move To SharePoint ▼ SharePoint ▼	Search	Move to: ? To Manager Team E-mail	4 4	A Move ▼ Move ▼ M Rules ▼ M OneNote	۲ Tags	Find a Conta Address E Filter E-m	Book
New Delete	Respond	OnePlaceMail	SharePoint (Advanced)	154	Move		Find	
Favorites	<	Search Inbox (Ctrl+E)	Project Sites		-			Q	<
DemonstrationUser1@SCINA	рпс	Arrange By: Date	Matter Mana	Oldest on top					
		Demonstration User 2	People Search						
Drafts		RE: Test Email Message		Matter Manag	Matter Management System				
Sent Items (1)		🚔 Demonstration User 2		https://onep	lacem	ail.sharepoint.co	m/searc	h/Pages/matter	s.aspx
Deleted Items (8)		RE: Project Initiation Doct	Iment (PID) - Revie	OnePlace	Mail				_
🧔 Junk E-mail	=	Demonstration User 2 RE: Project Initiation Docu	ument (PID) - Revie	Press F1 f		l-in help.			-
Outbox		<u>A</u>						1221	5

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:

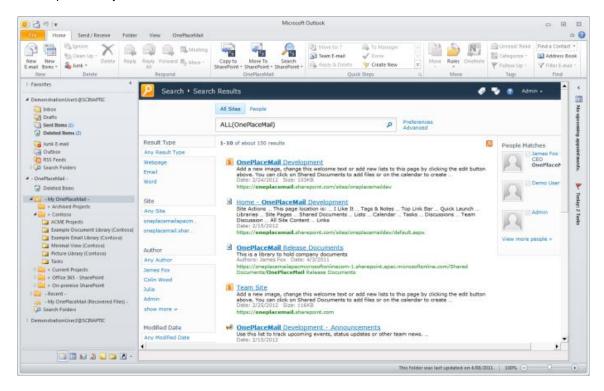
- Search automatically captured email metadata
- Search any other metadata (item columns)
- Search content
- Search email body content
- Search email attachments

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).

2 🔁 🕫 =	Microsoft Outlook	- • 12
File Home Send / Receive Folder	View OnePlaceMail	۵ 🕜
New New E-mail Items - New New Delete	Renty Forward III, Mover - Copy to Move To Careth Move To Careth	d a Contact * Address Book Filter E-mail * Find
Favorites DemonstrationUsed@SCINAPTIC DEmonstratioUsed@SCINAPTIC DEmonstrationUsed@SCINAPTIC DEmonstrationU	Search • Advanced Search Project Sites admin Project Sites @ @ Admin People Search @ @ @ Admin	
Sent Rems (1) Deleted Rems (2) Junk E-mail Outbox SSS Feeds Gase Search Folders	Find documents that have All of these words: OnePlaceMail The exact phrase: Any of these words:	No upcoming appoint ments.
OnePlaceMail - Deleted Items	None of these words: Data Control of the control of	*
My OnePlaceMail - Archived Projects Archived Projects AcME Projects Example Document Library (Conto Example Email Library (Contoso) Minimal View (Contoso) Pricture Library (Contoso)		Today: 2 Tasks
Tasks Surrent Projects	Result type: All Results	
0 == > Office 365 - SharePoint 0 == > On-premise SharePoint 1 = 0 = - Recent - = - My OnePlaceMail (Recovered Files) - ↓ Search Folders	Add property restrictions Where the Property [(Pick Property)] Contains] And]	
A 1 1 2 2 1 2 2 4	Done	<u> </u>
	This folder was last updated on 4/08/2011. 100% 🕤	U 🕂 .

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

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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.

0 2 7 1							Inbox - De	emonstrationUser1@S(
File Hor	ne Send / Receive	Fold	der View OnePlaceMail					
New New E-mail Items *	ingnore ing Ignore ing Clean Up ▼ ing Clean Up ▼ Delete	Rep	↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓ ↓	Copy to SharePoint * SI	Move To	Ø Search ▼ W Open Den Launch ▼	lage Move to: ? age Team E-mail age Reply & Delete	☐ To Manager ✓ Done Ø Create New
New	Delete		Respond	0	nePlaceMai	SharePo	int Conference Las Veg	jas 📃 📃
 Favorites Inbox Sent Iter Deleted 	ms (1) Items (8)	<	Search Inbox (Ctrl+E) 吗!! 泣 臣 @ Received ▼ 合 Thu 21/07/2011	From Demonstration	Su User 1 RE	FY 2013 Calculat Leave Re	or equest	S Size 🕅 🗡
✓ Demonstratio	onUser1@SCINAPTIC		 i) Tue 27/04/2010 9 i) Wed 17/02/2010 Fri 22/01/2010 6: 	Demonstration	User 2 RE	: Example Ema	rchase Order il ion Document (PI	22 🕅 12 🯹
			Launch	Locations				

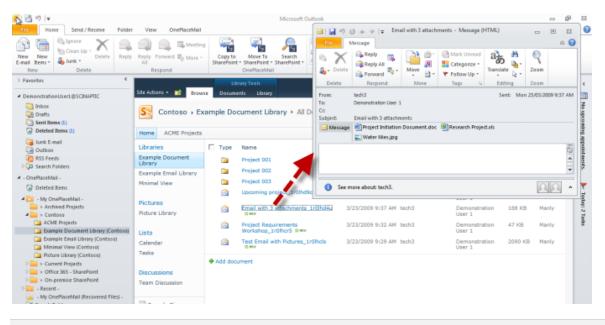
The launch locations can be defined by your administrator and deployed to Microsoft Outlook or you can define the locations personally using the OnePlaceMail – Settings – Launch window.

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.

Home Send/Receive Folder	View OnePlaceMail				Microsoft	Dutlook						0	9 8 6
lev New mak Pens- New Devte	Respond		Copy to tarePoint	Mave • SharePo OnePlac	int - SharePoint -	Can Arove to: 1 Can Team E-mail Can Reply & Deleta	To Manager Done Create New UK Stept	- 🙆 * (1)	lules =	Categoriae * Follow Up * Topi	M Ad V Fit	Contact + dress Book er E-mail Find	
Favorites C				rary Tools	and the second						į,	dmin +	
DemonstrationUser1@SCR44PTIC photox Confts Confts Confts Conftent Rems (1) Deteted Rems (1)	Site Advant - Second New Ustaad Document - Document - New	New	Deck	dR anent ()	Properties Pro	Edit perties X	nali a Link of Me • Downloa Capy	da 📅 Wo	Warkflow	-30 x			No upcoming
 Junk E-mail Outbias PSS Feeds Search Folders 	Libraries Example Document Library	P	Type	Name Project Project	001		Constant of the second	nail From Nan		Size.	File Size	Region	suppointments.
- OnePlaceMail -	Example Email Library Minimal View			Project		Ис () ни 3/3	3/2009 9:39 AM 1s	chă	Demo User 1	mitration 1	79 KB	Harily	100
Archived Projects Scontoso	Pictures Picture Library	P	6	Email se	th 3 attachments	_trolhd4u3/2	3/2009 9:37 AM te	ch3	Demo User 1	instration	188 KB	Marsly	Todeșt 2 Fases
ACME Projects	Lists		9	Project Worksh	View Prope		3/2009 9:32 AM te	ch3	Demo User 1	nstration	47 KB	Manly	90
Example Email Library (Contoso) Minimal View (Contoso)	Calendar			Test En	Check Out	3/2	3/2009 9:29 AM te	chā	Demo User 1	instration	2090 KB	Hanly	
	Taske Discussions Team Discussion	•	Add doo	ument 🤇	E-mail as A Alert Me Send To Manage Pe X Delete	•	>						

Select 'Email as Attachment' when sending an external email

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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.

Open Quick Save All Remove As Attachments Attachme	ViaceMail Attachm Show Essage eived From 23/03/2009 9:2 tech: 123/03/2009 9:3 tech:	m 13 13 13 13 13	Subject Test Email Message Test Email with Pictures Project Requirements Workshop	ch Inbox (Ctri+E) Categories	Size 281 KB 2 MB	\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	A III
DemonstrationUser1@SCINAPTIC Inbox Inbox Drafts Detected Items (1) Junk E-mail Junk E-mail Outbox	23/03/2009 9:2 tech 23/03/2009 9:2 tech 23/03/2009 9:3 tech 23/03/2009 9:3 tech 23/03/2009 9:3 tech 23/03/2009 9:4 tech	13 13 13 13	Subject Test Email Message Test Email with Pictures Project Requirements Workshop		281 KB 2 MB		A III
Inbox Image: Constraint of the second seco	23/03/2009 9:2 tech 23/03/2009 9:2 tech 23/03/2009 9:3 tech 23/03/2009 9:3 tech 23/03/2009 9:3 tech 23/03/2009 9:4 tech	13 13 13 13	Test Email Message Test Email with Pictures Project Requirements Workshop	Categories	281 KB 2 MB	8 9 9	R
Image: Sent Rems (1) Image: Sent Rems (1) Image: Sent Rems (1) Im	23/03/2009 9:2 tech 23/03/2009 9:3 tech 23/03/2009 9:3 tech 23/03/2009 9:3 tech 23/03/2009 9:4 tech	13 13 13	Test Email with Pictures Project Requirements Workshop		2 MB	Ÿ	
Sentitems (1) Image: Constraint of the sentimeters of the s	23/03/2009 9:3 tech 23/03/2009 9:3 tech 23/03/2009 9:4 tech	13 13	Project Requirements Workshop			8	
Image:	n 23/03/2009 9:3 tech n 23/03/2009 9:4 tech	13					
ig Junk E-mail ig 0 Mon ig 0 utbox	1 23/03/2009 9:4 tech				5 KB	8	upcoming
Wed			Email with 3 attachments	Transferred to SharePoint	137 KB	8	_ lin
Outbox 🔒 🔒 Wed	1 20/00/2000 2/5 toch?	13	Upcoming project	Transferred to SharePoint	33 KB	8	
	130/03/2009 2.3 tech	12	RE: Project Initiation Document (PID) - F	Review Transferred to SharePoint	9 KB	8	poir
	1 30/09/2009 2:5 tech1	1	RE: Project Initiation Document (PID) - R	Review Transferred to SharePoint	10 KB	*	Ť
Search Folders 🖂 Wed	1 30/09/2009 3:4 tech2	12	RE: Project Initiation Document (PID) - R	Review (with	11 KB	*	appoint ments.
- OnePlaceMail -	3/11/2009 7:10 Dem	nonstration User 1	Example Email		6 KB	8	
Thu 2	26/11/2009 6:59 Dem	nonstration User 1	RE: Project Initiation Document (PID) - F	Review	12 KB	8	
🗟 Deleted Items 📃 🚔 Mon	7/12/2009 1:56 Dem	nonstration User 2	RE: Test Email Message		10 KB	8	X
🛿 🔀 - My OnePlaceMail - 📄 🔂 🔂	15/12/2009 4:10 Dem	nonstration User 2	RE: Project Initiation Document (PID) - R	Review (with	14 KB	8	Foday:
	2/01/2010 6:47 Dom	appetration User 2	DE Droiget Initiation Document (DID)	Deview	17.00	17	9:2
ACME Projects Example Document Library (Conto Example Email Library (Contoso) Example Email Library (Contoso) More Last changed: More	on Document.doc nday, 23 March 2009 Project Initiation Docum]Research Project.xls (17 KB)	Water lilies.jpg (86 KB)			Tasks
> On-premise SharePoint > On-premise SharePoint > Recent - See more at	about: tech3.				22	*	

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.

G OnePlaceMail - Save to SharePoint						
Location Tasks						
	Properties Lo	cation Content				
ACME Projects E- E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E - E	Content Type	Task	•			
Example Email Library (Contoso) Event Minimal View (Contoso) Event Minimal View (Contoso) Event Picture Library (Contoso) Event Tasks Current Projects Softice 365 - SharePoint Event SharePoint	✓ Use Email Subject					
	Title *	Title * [Auto Set]				
	Predecessors	Predecessors < <type search="" to="">></type>				
	Priority	•				
ia⊶ioo - Recent - ia⊶ioon - SharePoint -	Status	Not Started	•			
	% Complete	%				
	Assigned To		•			
	Description		*			
			*			
	Start Date	25/02/2012				
	Due Date					
۰ III ا						
Files Project Initiation Document.doc (23.5	5 KB); 🗐 Research Proj	iect.xls (13.5 KB)	Manage Files			
Scinaptic OnePlaceMail®			Save Cancel			
C	Complete SharePo	oint 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**.

🛃 49 -				Micro	soft Outlook					-	Ξ Σ
File Home Send / Receive F	older	View On	ePlaceMail								\$
Vew New mail Items- New Delete	Reply	Reply Forward All Respond	🕮 Meeting Nore -			Move to: ? To Manager Team E-mail Quick Steps	-	Move - Rules - OneNote Move	Categorize * Follow Up *	Find a Contact Address Book Filter E-mail Find	
Favorites	<			List Tools							
DemonstrationUser1@SCINAPTIC		Site Actions 👻 👔	🖄 Brow							Admin 🚽	
Inbox Deleted Items (1)		New New Folder	View Item	Edit Item Permissions	File	Alert Me +	s Appro	I	ike Tags & t Notes		
G Junk E-mail		New Libraries		Manage	Actions Share		'orkflows tatus		s and Notes ue Date % Cor	nplete Predeces	
RSS Feeds		Example Docu Library	ment	attack	with 3	No		(2) Normal		1 %	
- OnePlaceMail -		Example Email	Library	I NEW							`
Deleted Items	=	Minimal View		Add new item							X
 - My OnePlaceMail - > Archived Projects > Contoso 		Pictures Picture Library									TUULAY: 2 TASKS
ACME Projects Example Document Library (Contended)	D	Lists									õ
Example Email Library (Contoso)		Calendar									
🚞 Minimal View (Contoso) 🚞 Picture Library (Contoso)		Tasks									
Tasks											
Current Projects Office 365 SharePoint		Discussions									_



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.

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File Home Send / Receive Fold	er View OnePlaceMail					۵ 🕜
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 My OnePlaceMail - > Archived Projects 	Pictures Statu	Not Started			_	Today: 2 Tasks
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Example Document Library (Conto Example Email Library (Contoso) Example View (Contoso)		ription 2/25/2012				
Picture Library (Contoso) Tasks	Tasks Due I Attac	hments Research Project.xls				
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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.

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			-	(7)			
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■ Recent -	Discussions Team Discussion		Alert Me Send To	•			
01. Contracts (oneplacemail.sharep: Example Email Library (Contoso)	4	49	Manage Permissions				
- S - S - S -	javascript;						
				This folder was last	updated on 4/08/2011. 100% (

Email as Attachment (for sending emails to external recipients)

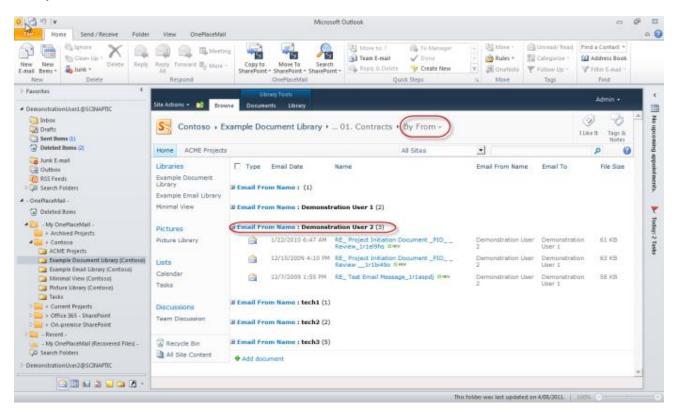
This is useful if you require the ability to conveniently send a file from SharePoint to an external recipient. For internal emails, it is recommended you use the 'Send To – Email as a link' capability provided by SharePoint.

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

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🔆 Favorites	Name	Date	Туре	Size Tags
🧮 Desktop	Hydrangeas	24/03/2008 4:41 PM	JPEG image	582 KB
鷆 Downloads	🔊 Jellyfish	11/02/2008 11:32 AM	JPEG image	758 KB
🖳 Recent Places	🔁 oneplacemail-highl	28/09/2011 12:52 PM	Adobe Acrobat D	2,466 KB
	Penguins	18/02/2008 5·07 AM	IPEG image	760 KB
🥽 Libraries	Project Specification	Preview	Word D	10 KB
Documents	📔 Tulips	Set as desktop background	e e	607 KB
👌 Music		Print		
Pictures		Rotate clockwise		
📑 Videos		Rotate counterclockwise		
🖳 Computer		Share with	•	
🚢 Local Disk (C:)		Send to	> Com	pressed (zipped) folder
		_		top (create shortcut)
		Cut		uments
		Сору		ecipient
		Create shortcut		recipient
		Delete		ePoint
		Rename		py Disk Drive (A:)
		Properties	Loca	I Disk (C:)

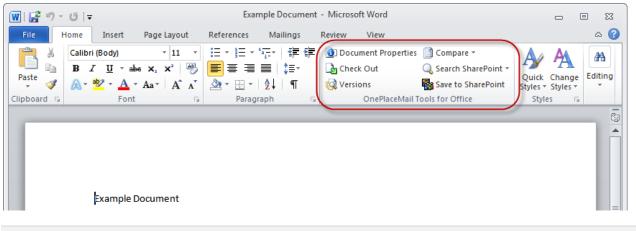
Save files from Windows Explorer

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 New ribbon group on the Home Ribbon tab providing Check In, Check Out, Discard Check Out, File Properties (Document Information Panel)	Yes	Yes	Yes
Compare SharePoint Document Versions Visually compare versions showing all differences between two documents	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.

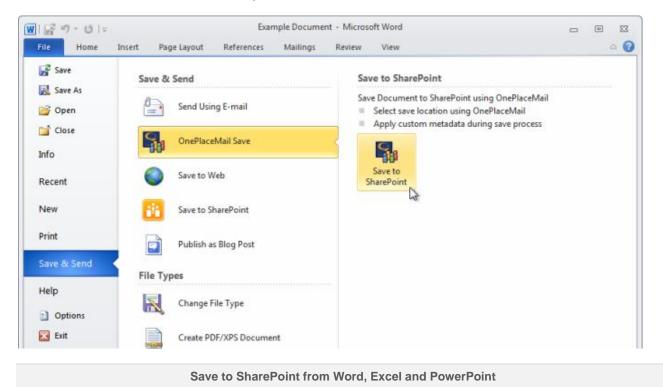
Once the file has been transferred to SharePoint you will notice that other buttons become available in the OnePlaceMail Tools for Office group related to document management (such as check in, checkout, discard checkout, and versions).

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:



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

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File Home Insert Pag	ge Layout References	Mailings Review	View	۵ 😮
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Project Document Properties - Server			ail.sharepoint.com/sites/Contoso/Ex	
		ail Category:	Email Conversation:	Email Conversation ID:
Email Conversation Index: Email D	Date: Em	ail Date Received:	Email Date Sent:	Email From:
Email From Name: Email ID		ail Importance:	Email Sensitivity:	Email Subject:
Email Type: Example Red	le Choice: Rei	quired Text:	Example Date: 25/02/2012	
		· ·		
Example Docur	ment			

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

ersions	s saved to: <u>http://vs-se</u>	erver43/dients/opmreleases	/2009 12 08/0	official Documents/
No.	Modified 🔻	Modified By	Size	Comments
0.2	5/02/2010 10:48 AM	SCINAPTIC\cdwyer	7.6 MB	
0.1	5/02/2010 10:48 AM	SCINAPTIC\cdwyer	7.6 MB	

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.

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1	/ersions s	saved to: <u>https://one</u>	olacemail.sharepoint.com/sites/Co	ontoso/Exa	ample Document Library/
	No.	Modified 🔻	Modified By	Size	Comments
	2.0	25/02/2012 3:56 PM	Admin	23.1 KB	Modifiy Section 1
	1.0	25/02/2012 3:56 PM	Admin	23.1 KB	Modifiy Section 1
		Oper	n Compare <u>R</u> est	ore	Delete Close

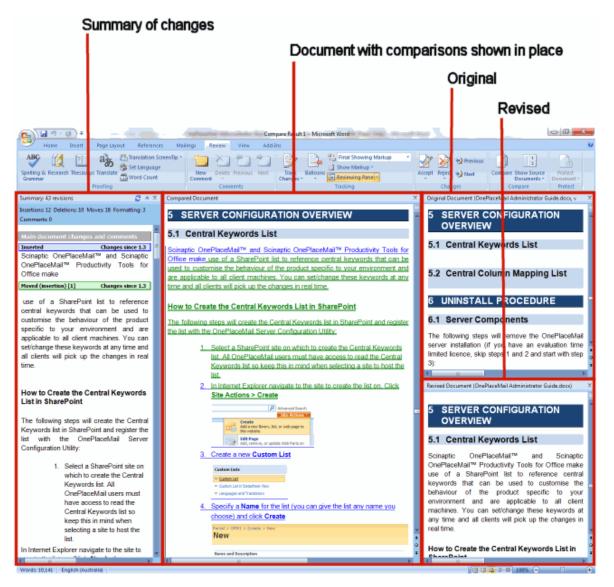
Versions window and available actions

1.38 Compare SharePoint Document Versions

Example Document - Micro	osoft Word				▣	23
ences Mailings Review	View					۵ 🕜
Document Properties Check In	🔞 Version		Style		*A iting	
Discard Check Out	Co	jor Version mpare this document with the last jor version published on the server.	- tyle	s Lui	Ť	
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	Co	mpare mpare two versions of a document gal blackline).				≡
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	<u>s</u> hov	/ Source Documents	Þ			

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.

₩ ⊑ ² ग - ७ -	Example Document - Microsoft Word	
File Home Insert Page Layout Referen	nces Mailings Review View	۵ 😮
Calibri (Body) \cdot 11 \cdot Paste \bullet B I \bullet \bullet \bullet Paste \bullet \bullet A \bullet A \bullet \bullet Clipboard \bullet \bullet Font \bullet \bullet \bullet \bullet	ph Document Properties 😡 Versions 🖬 Save to SharePoint a Check In Compare * Discard Check Out Q Search SharePoint * On SharePoint (Advanced)	Styles Editing
	Project Sites Matter Management System People Search	

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.

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File Home Insert Pa	ge Layout References Mailings Review View	۵ 🕜
Paste	▼ 11 II II III III III IIII IIII IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	

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.

ocation 01. Contracts (oneplacemail.sharepoi	nt.co	m\sites\Contoso\Example Docu Search: 01. Contrac	cts (oneplacema	iil.sharepoint.co	m\sites\	C/P
- My OnePlaceMail -		Name	Modified By	Modified	Туре	Size
		Contains: V	Contains: 😽	,	C 🗑	2
	1	PID.doc	Admin	24/02/2012	doc	48.5 KB
ie	•	Project Specification.docx	Admin	25/02/2012	docx	20.2 KB
01. Contracts (oneplacemail.sharepoint.com\site		Test Email Message_1r0lhckr.msg	Admin	25/02/2012	msg	332.5 KE
Picture Library (Contoso) Example Email Library (Contoso)		RE_ Project Initiation Document _PID Review_1r1el9hs.	Admin	25/02/2012	msg	61 KB
- SharePoint -	1	OnePlaceMail Administrator Guide.pdf	James Fox	29/06/2012	pdf	1.99 MB
		Example Email_1r18sokj.msg	James Fox	29/06/2012	msg	51.5 KB
		RE_ Project Initiation Document _PID Review1r159	James Fox	29/06/2012	msg	55.5 KB
		RE_ Project Initiation Document _PID Review_1r159mt.	James Fox	29/06/2012	msg	61.5 KB
		RE_ Project Initiation Document _PID Review_1r159m	James Fox	29/06/2012	msg	53.5 KB
		Upcoming project_1r0lhd9c.msg	James Fox	29/06/2012	msg	78.5 KB
	2	Research Project.xls	James Fox	29/06/2012	xls	38.5 KB
4	1 it	em selected				

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

G OnePlaceMail - Open from SharePoint					x
Location 01. Contracts (oneplacemail.sharepoint	nt.com\sites\Contoso\Example Docu Search: 01. Contrac	ts (oneplacema	il.sharepoint.cor	n\sites\	•••)
My OnePlaceMail -	Name Contains:	Modified By Contains: 🗸		Type	_
Office 365 - SharePoint On-premise SharePoint On-premise SharePoint On-premise SharePoint On-premise SharePoint On-contracts (oneplacemail.sharepoint.com\site Office Pointson) Office Pointson State Library (Contoso)	PID.doc Project Specification.docx	Admin Admin	24/02/2012 25/02/2012		48.5 КВ 20.2 КВ
	Test Email Message_1r0lhckr.msg RE_Project1z (uation Document _PID Review_1r1el9hs OnePlaze Mail Administrator Guide.pdf	Admin Admin James Fox	25/02/2012 25/02/2012 29/06/2012	msg	332.5 KB 61 KB 1.99 MB
B- A - SharePoint -	Concrete chain Administration Guide point Evanple Email_1r18sokj.msg RE_ Project Initiation Document _PID Review1r159 RE_ Project Initiation Document _PID Review _1r159mt.	James Fox James Fox	29/06/2012 29/06/2012 29/06/2012	msg msg	51.5 KB 55.5 KB 61.5 KB
Search SharePoint	RE_ Project Initiation Document _PID Review_1r159m		29/06/2012 29/06/2012	msg	53.5 KB 78.5 KB
	Research Project.xls	James Fox	29/06/2012	xls	38.5 KB
۰ <u>ااا</u>	1 item selected Open in Application	on Open	in Browser	Ca	ancel

Search and Open from SharePoint

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SharePoint Site Mailboxes (2013 Only)

OnePlaceMail extends SharePoint Site Mailboxes to help overcome many of their limitations (see <u>White Paper</u>). 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.

S OnePlaceMail - Settings - 🗆 🗙										
SharePoint Connections Outlook Site Mailboxes	Save	Search	Launch	Credentials	Proxy	Licensing				
How does OnePlaceMail support SharePoint Site Mailboxes?										
SharePoint Site Mailboxes*										
Enable Site Mailbox support										
Show Site Mailbox compatibility warnings										
How do I exclude OnePlaceMail support for selected Site Mailboxes?										
Site Mailbox Configuration Cache										
Clear Site Mailbox configuration cache										

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 basic 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.

5		OneP	laceM	ail - Set	tings			_ □	×
SharePoint Connections	Outlook	Site Mailboxes	Save	Search	Launch	Credentials	Proxy	Licensing	
Default Save Settings When saving, pron O Always Never		perties:							
Suppress Save Results Window Do Not Automatically Check-In Documents to Library									
Recent Locations Image: Show Recent Locations in Navigation Tree Recent Locations Tracked: 10 Clear Recent Locations									
SharePoint Filename Format Move the filename format when saving email to SharePoint? Custom Mapping of Email Attributes to Columns									

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)

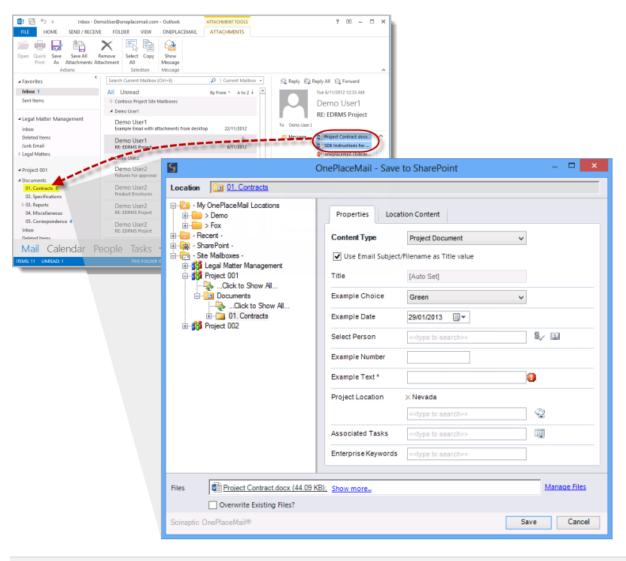
You can show the 'Save to SharePoint' window by selecting 'Always' in the Default Save Settings. This will apply to all Site Mailboxes and their libraries being managed by OnePlacceMail.

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.

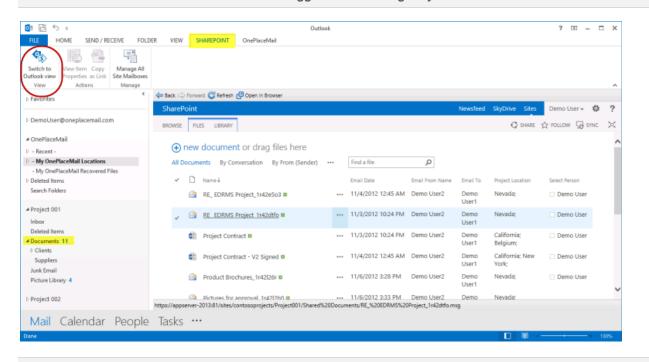


Tag content with custom metadata when saving to a Site Mailbox

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.

📴 5 🕫	Project 001 - Documents - Project 0	01 - Outlook	?	Œ	- 5	X
FILE HOME SEND / RECEIVE FOLD	ER VIEW SHAREPOINT OnePlaceN	Aail				
Switch to harePoint view View Actions Manage						
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DemoUser@oneplacemail.com	 Date: Today 					
	OnePlaceMail Licensing FAQ's.docx	Tue 21 Demo User 81 K				
OnePlaceMail	Project Contract.docx	Tue 21 Demo User 39 K				
- Recent - - My OnePlaceMail Locations	all Project Contract - V2 Signed.docx	Tue 21 Demo User 43 K				
- My OnePlaceMail Recovered Files	OnePlaceMail-Brochure-Express.pdf	Tue 21 Demo User 1.1				
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Documents 11	RE_ EDRMS Project_1r42dtfo.msg	Tue 21 Demo User 186 K				
> Clients	Product Brochures_1r42l26r.msg	Tue 21 Demo User 2,3				
Suppliers Junk Email	Pictures for approval_1r42l2h0.msg	Tus 21/0762013 8:44 Ptd				×
Picture Library 4						
Mail Calendar People	Tasks …					
EMS: 11 UNREAD: 11	ALL FOLDERS ARE UP	TO DATE CONNECTED		-		00%



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

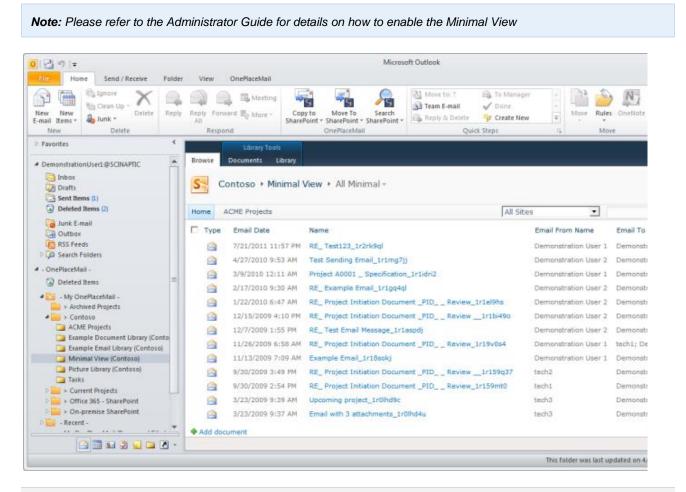
Site Mailbox – SharePoint Tab: Toggle from SharePoint View to Exchange Style View

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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).



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

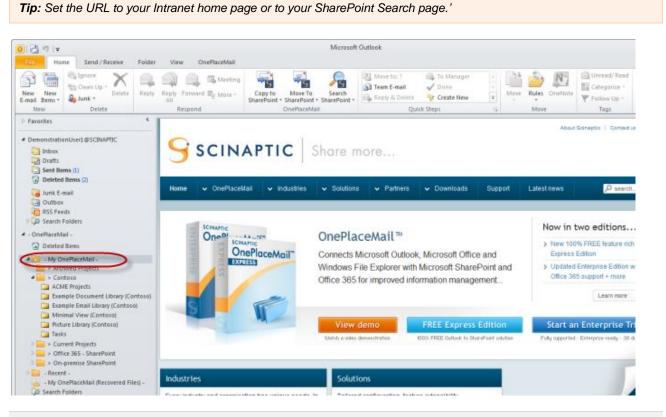
Home Send / Receive Folder	View OnePlaceMail		Microsoft Outlook			
Vew New mail Items* New Delete	👰 🔍 🖽 Meeting	Copy to SharePoint	Move To SharePoint + SharePoint - OnePlaceMail	E-mail 🖌 Done	+ Move	Rules One
Favorites 4		Lib	rary look			
DemonstrationUser1@SCINAPTIC Demon	Site Actions • Browse Site Actions • Contoso • Exar Hame ACME Projects	Docume	ubrany cument Library + 01. Contr	acts + All Documer	nts +	
Junk E-mail	Libraries	Type	Name	Email Date	Email From Name	Email T
RSS Feeds	Example Document Library	8	RE_ Project Initiation Document _PID Review_1r1el9hs Sime	1/22/2010 6:47 AM	Demonstration User 2	Demon User 1
OnePlaceMail - Deleted Rems	Example Email Library Minimal View	8	RE_Project Initiation Document _PIDReview1r1bi490 @###	12/15/2009 4:10 PM	Demonstration User	Demon User 1
🖌 🎦 - My OnePlaceMail -	Pictures		RE_Test Email Message_1r1aspdj	12/7/2009 1:55 PM	Demonstration User 2	Demon User 1
 Archived Projects Cantoso ACME Projects 	Picture Library		RE_Project Initiation Document _PIDReview_1r19v0s4 Date	11/26/2009 6:58 AM	Demonstration User 1	tech1; Demon User 1
Example Document Library (Contoso)	Lists	9	Example Email_1r18sokj 🖬 🕬	11/13/2009 7:09 AM	Demonstration User	Demon User 1
Minimal View (Contoso) Picture Library (Contoso)	Calendar Tasks	9	RE_ Project Initiation Document _PID Review1r159q37 Decv	9/30/2009 3:49 PM	tech2	Demon User 1
 Tasks Current Projects 	Discussions	8	RE_Project Initiation Document _PIDReview_1r159mt0 @###	9/30/2009 2:54 PM	tech1	Demon User 1;
 Office 365 - SharePoint On-premise SharePoint 	Team Discussion		RE_Project Initiation Document _PIDReview_1r159mnp	9/30/2009 2:52 PM	tech2	Demon User 1
Recent - My OnePlaceMail (Recovered Files) -	Recycle Bin	9	Upcoming project_1r0lhd9c DHM	3/23/2009 9:39 AM	tech3	Demon User 1
Ga Search Folders	All Site Content		Email with 3 attachments_1r0lhd4u	3/23/2009 9:37 AM	tech3	Demon User 1
DemonstrationUser2@SCINAPTIC	\square	國	PID BHO	3/23/2009 9:37 AM	tech3	Demon User 1
- 5 📼 🖬 🕲 🔤 🗃						

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'

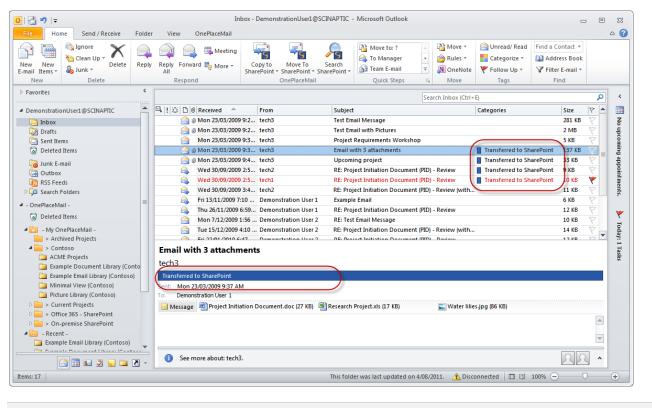
When the user selects the '- My OnePlaceMail – 'folder; the OnePlaceMail website home page is presented by default. This can also be changed using the configuration update process.



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)

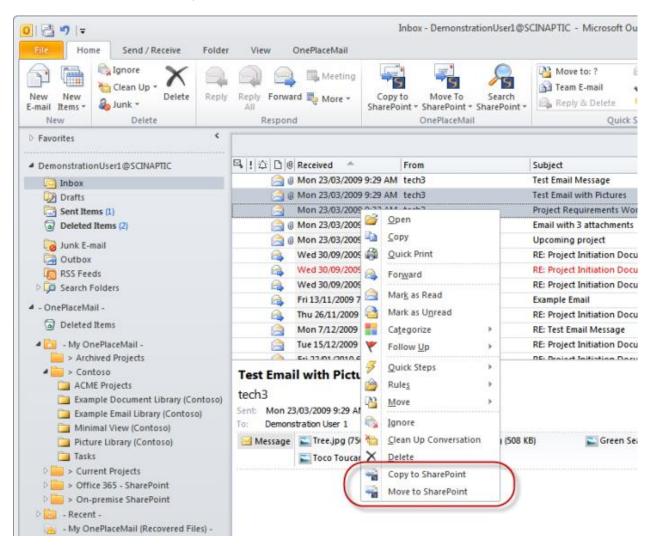
Alternate File transfer methods

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.



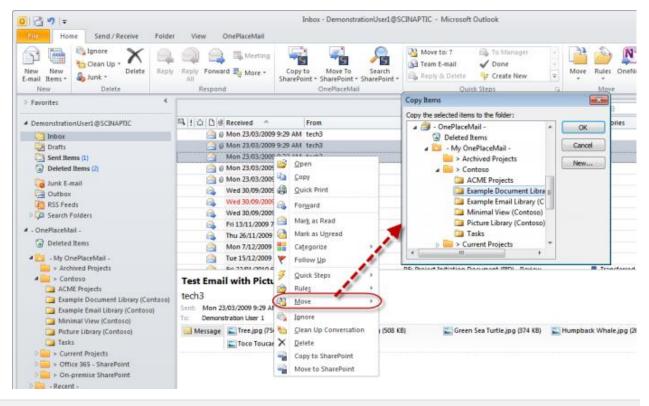
Right-click – Save to SharePoint

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:

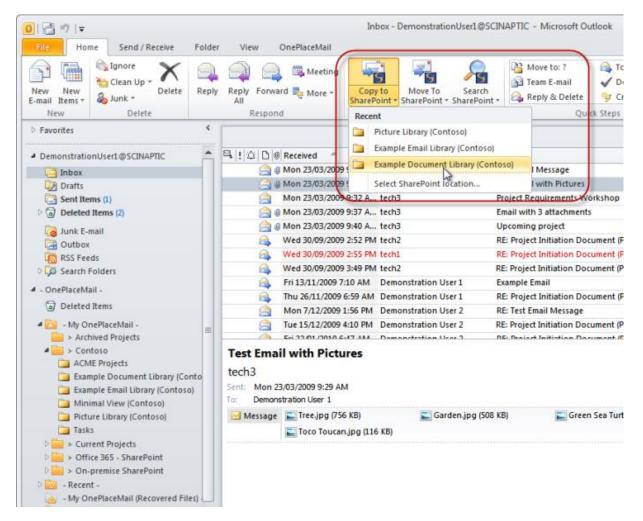
- 1) Select the email and/or attachment you wish to upload
- 2) Right-click and select Move to Folder from the dialog box
- 3) A dialog box will appear where you can select the destination





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

Eile Edit View Go Iools Actions		ceMail Help	# * Ø	🛄 Search address books	- 🛛 🔀 Copy	To SharePoint 👪 Move To	question for he SharePoint		E
Mail		🔲 Inbox				Search Inbox		0.	×
Favorite Folders	*	B,!∴ D0	From	Subject	Received	Categories	Size	7	P
Inbox (1) Unread Mail (1)		🖃 Date: Today				1.8			
Sent Items	-		Demonstrati	Example Email	Fri 13/11/2009 7:10 A	М	5 KB		4
Mail Folders	*	Date: Last V	Vank						
All Mail Items				T. 4. 007				12	-
Mailbox - Demonstration User 1 My OnePlaceMail - D1. Quick Reference D2. Client Projects D3 > ABC D3 > ABC D3 > ABC		Date: Older	Demonstratio	I LESTE PUP	Tue 3/11/2009 9:32 AI	51	2 MB		
		8	tech2	RE: Project Initiation Docum	Wed 30/09/2009 3:49		10 KB	R	5
		64	tech1	RE: Project Initiation Docum	Wed 30/09/2009 3:14		9 KB		
		6	techt	RE: Project Initiation Docum	Wed 30/09/2009 2:55		S KB	Y	ĸ

Microsoft Outlook 2007, 2003

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OnePlaceMail Settings

1.51 OnePlaceMail Settings

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

1.51.1 My SharePoint Tab

S OnePlaceMail - Settings - 🗆 🗙							
My SharePoint Outlook Preview Site Mailboxes Save Search Launch Credentials Proxy Licensing							
Recent Locations Image: Show Recent Locations in Navigation Tree Recent Locations Tracked: 10 Clear Recent Locations							
Location Search Image: How do I configure location search settings? The search service associated with the following site collection is used for farm wide search: Image: First site collection added (default) Image: Specific site collection Image: http://appserver-2013 Image: Disable search across site collections							
Search query mode: O Keyword query language search (default) Title property search							
Location Filtering Image: How do I configure location filtering settings? When filtering locations in the Navigation Tree use the following filter mode: Image: Starts with typed characters (default) Image: 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 queery 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 'Cotains...'. 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

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)* 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: Email Correspondence Logging (Advanced)* 							
 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: Email Correspondence 							
 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 Oefault Data File Email Content Type () Select email content type by default for emails Content Type Name: Email Correspondence 							
 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: Email Correspondence 							
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 - Local user profile Default Data File Email Content Type Select email content type by default for emails Content Type Name: Email Correspondence							
 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: Email Correspondence 							
 ✓ 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: Email Correspondence 							
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 - Roaming user profile Default Data File Email Content Type Select email content type by default for emails Content Type Name: Email Correspondence							
 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 I Select email content type by default for emails Content Type Name: Email Correspondence							
 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: Email Correspondence							
 OnePlaceMail Data File - Local user profile (Recommended) OnePlaceMail Data File - Roaming user profile Default Data File Email Content Type I Select email content type by default for emails Content Type Name: Email Correspondence							
 OnePlaceMail Data File - Roaming user profile Default Data File Email Content Type ✓ Select email content type by default for emails Content Type Name: Email Correspondence 							
 ○ Default Data File Email Content Type ✓ Select email content type by default for emails Content Type Name: Email Correspondence 							
Select email content type by default for emails Content Type Name: Email Correspondence							
Content Type Name: Email Correspondence							
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.

Share more
Office and Windows File Explorer with improved information management
 Search SharePoint from Outlook Send and save email to SharePoint File Explorer integration
Take a tour > Close

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.

SharePoint Connections Outlook Save To SharePoint 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: Transferred to SharePoint
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: OnePlaceMail Email
Logging (Advanced)*
Enable application logging (support) () <u>Open log file location</u>
* Please restart Outlook for these changes to take effect.
OK Cancel

1.51.3 Preview Tab

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

S CS	S	S OnePlaceMail - Settings – 🗆
OnePlaceMail Manage My	About	DieplaceMail - Settings – – I
Settings OnePlaceMail Folde OnePlaceMail	ers OnePlaceIviali *	SharePoint Outlook Preview Site Mailboxes Save Search Launch Credentials Proxy Licensing
▲ Favorites	Search: Email an	
Inbox	Explorer View	Thresholds for Local Preview
Sent Items 11	Name	Warning size (KB): 100
Outbox [3]	Contains:	Maximum size (KB): 2000
	📄 🙈 RE_ ROI Sp	
DemoUser@oneplacem	ConePlaceM	
▲ OnePlaceMail	RE_ WIP an	Project to alight aids provide when SharePaint provide is not available for the file types:
	Email with	All None All Except None Except
▷ - Recent - ▲ - My OnePlaceMail -		
 A - My OnePlaceMail - Document Library 	dest_1r4k3	
Email and Docs Library	RE_ Office 2	
Events Calendar	🔁 OnePlaceM	(separate each file extension with a semi colon e.gdocx;.msg;.xls)
Picture Library	DnePlaceM	
Task List	Project Cor	Preview Cache
- My OnePlaceMail (Reco	saaa_1r4p9	
Deleted Items		
Search Folders	😢 hello.pptx	
▷ Project 002	🚖 RE_ EDRMS	
Project 002	📄 Product Bro	
	RE_ Hacky	
M 📰 🞎 ····	-	

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 doubleclicking 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.

S OnePlaceMail - Settings ×
My SharePoint Outlook Preview Site Mailboxes Save Search Launch Credentials Proxy Licensing
Default Save Settings When saving, prompt for properties:
✓ Suppress Save Results Window
Do Not Automatically Check-In Documents to Library
SharePoint Filename Format
How do I configure the filename format when saving email to SharePoint?
Custom Mapping of Email Attributes to Columns Image: Open state Image: Open state
List URL: Test Connection
SharePoint List Definitions
OK Cancel

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.

- My OnePlaceMail -	Properties Loca	tion Content	
Contoso Contoso	Content Type Use Email Subject/	Project Document Filename as Title value [Auto Set]	•
E- Picture Library (Contoso) E- Surrent Projects		Contractor	
	Enterprise Keywords	fr	
i	Example Choice	Suggestions France [Region]	Create new
- SharePoint -	Required Text *	Friday [Weekdays]	
	Example Date	partorena D-	
	Region	2 Minut	
		<dype search="" to="">></dype>	42
	Example Lookup	< <type search="" to="">></type>	
les <u>Test Email with Pictures</u> 1r0lhcls.ms	g (2.01 MB); Show more		Manage Files

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.

	SharePoint	
View	RE_ Project Initiation Document _PID Review_1r19v0s4.msg	
View	RE_ Test Email Message_1r1aspdj.msg	
OnePlaceMail®		Close
	suits View View	View RE_Project Initiation Document _PID Review_1r19v0s4.msg View RE_Test Email Message_1r1aspdj.msg

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

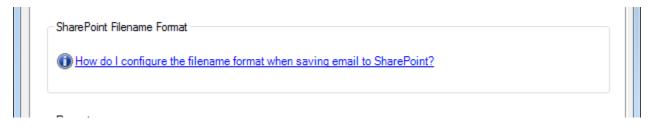
By default, all emails/files saved by OnePlaceMail to SharePoint are automatically checked-in. This behavior can be reversed by enabling this option on a global basis or for selected libraries/lists (See Manage My OnePlaceMail Folders).

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

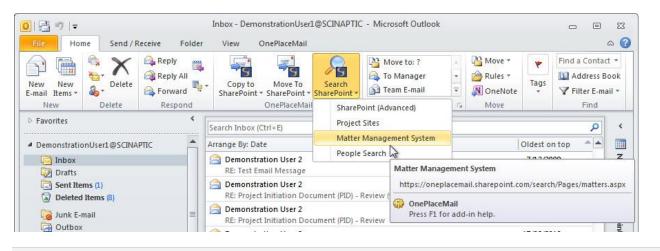
OnePlaceMail provides the ability to search SharePoint directly from within Microsoft Outlook. This includes providing direct access to SharePoint Search, Fast Search and other 3rd Party search solutions and capabilities for user from within Microsoft Outlook.

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).

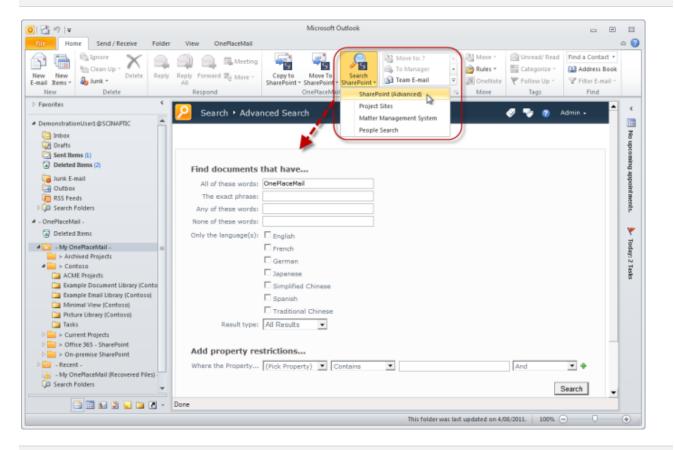
Tip: You can deploy the Search Site locations using the Config_update process described in the OnePlaceMail Administrator guide. See: <u>http://www.scinaptic.com/support/docs/index.html</u>

9 OnePla	aceMai	I - Settings	
SharePoi	int Con	nections Outlook Save To SharePoint Search Launch Credentials	Proxy Licensing
0 <u>Ho</u>	ow do I	configure search locations?	
Shar	ePoint	Search Locations	
Tit	tle	Advanced Search	Remove
UF	RL	https://oneplacemail.sharepoint.com/search/Pages/advanced.aspx?k=one	
		Example: http://myserver/mysearchsite/default.aspx	
Tit	tle	Intranet	Remove
UF	RL [https://oneplacemail.sharepoint.com/search/Pages/advanced.aspx?k=one	
		Example: http://myserver/mysearchsite/default.aspx	
Tit	tle	Legal Matter Management	Remove
UF	RL [eplacemail.sharepoint.com/search/Pages/advanced.aspx?k=onpplacemail	
		Example: http://myserver/mysearchsite/default.aspx	
-	Add lo	ocation	
			OK Cancel

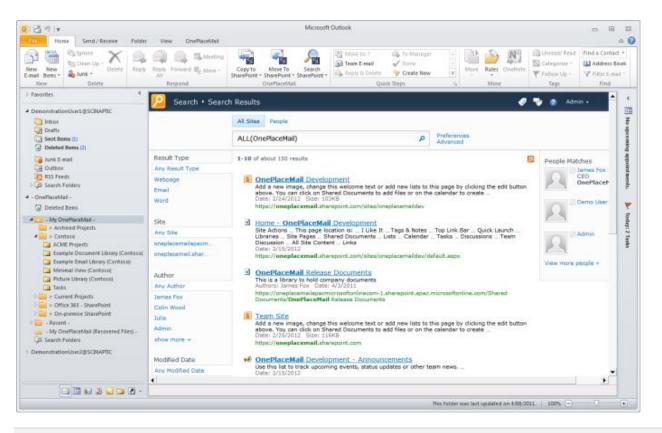
OnePlaceMail - Settings: Define Search Locations/Scopes



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.

0 == ") -			Inbox - Demo	onstrationUser1@S
File Home Send / Receive	Folder View OnePlaceMail			_
Glean Up +	🚘 📦 🚔 🗮 Meeting	S S		🗼 To Manager 🖌 Done
New New E-mail Items - & Junk - Delete	Reply Reply Forward 🌉 More - All	Copy to Move To SharePoint + SharePoint +	Banky & Dalata	🕏 Create New
New Delete	Respond	OnePlaceMai	i SharePoint Conference Las Vegas	
Favorites	Search Inbox (Ctrl+E)		FY 2013 Budget	۹
🖂 Inbox 🔁 Sent Items (1)	⊠ ! ☆ 🗅 🔘 Received 🔹	From Si	Leave Request	s Size 🕅 🔺
Deleted Items (8)	→ Thu 21/07/2011 → 0 Tue 27/04/2010 9	Demonstration User 1 R Demonstration User 2 Te		7 КВ 🖓 20 🖓
DemonstrationUser1@SCINAPTIC			E: Example Email	22 🟹
	Fri 22/01/2010 6:	Demonstration User 2 RI	E: Project Initiation Document (PI	12 🌾

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://.

tle	SharePoint Conference Las Vegas	Remove
уре	Web Page (URL) File/Application (Browse)	
RL	http://www.mssharepointconference.com/Pages/default.aspx	

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).

	nnections Outlook Save To SharePoint Search Launch Credentials	Proxy Licensing	G S a k Co	cal Disk (C:) Example Files	▼ 4 _j	Search Example File	S	
How do	I configure launch items?		Organize 🔻 Ne	w folder		811 •		?
-Launch Ite	ms Example: http://myserver/mycrmsystem		☆ Favorites	Name	Date modified	Туре		Siz
Title	FY 2013 Budget	Remove	Desktop	Budget 2013	10/09/2012 8:00 AM	Microsoft Excel Wo	rksheet	
Туре	Web Page (URL) Image File/Application (Browse,)		Recent Places	E				
File	Examples: notepad.exe, x:\documents\test.docx	•	Cibraries					
Title	Calculator	Remove	J Music					
Туре	Web Page (URL) File/Application (Browse)		Pictures					
File	calc.exe		Videos 🗧					
	Examples: notepad.exe, x:\documents\test.docx		· Computer		III			
Title	Leave Request	Remove		File name: Budget 2013				•
	Web Page (URL) O File/Application (Browse)					Open	Cancel	1
Туре								
Type URL	http://www.mssharepointconference.com/Pages/default.aspx							
	http://www.mssharepointconference.com/Pages/default.aspx Example: http://myserver/mycrmsystem							
		Remove						

	Settings Window – Launch: A File/Applic	ation
Title	FY 2013 Budget	Remove
Туре	Web Page (URL)	
File	C:\Example Files\Budget 2013.xlsx	0
	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.

SharePoint Cor	nnections Outlook Save To SharePoint Search Launch Credentials	Proxy Licensing	
🕕 <u>How do</u>	I configure launch items?		
Launch Ite	ms		
Title	SharePoint Conference Las Vegas	Remove	Â
Туре	Web Page (URL) File/Application (Browse)		
URL	http://www.mssharepointconference.com/Pages/default.aspx		
	Example: http://myserver/mycrmsystem		
Title	FY 2013 Budget	Remove	
Туре	Web Page (URL) File/Application (Browse)		=
File	C:\Example Files\Budget 2013.xlsx		
	Examples: notepad.exe, x:\documents\test.docx		
Title	Calculator	Remove	
Туре	Web Page (URL) File/Application (Browse)		
File	calc.exe		
	Examples: notepad.exe, x:\documents\test.docx		
Title	Leave Request	Remove	
Туре	Web Page (URL) File/Application (Browse)		
URL	http://vs-server98/contoso/_layouts/listform.aspx?PageType=8&ListId={E	34:	-

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.

G OnePlaceMail - S	Settings					×
SharePoint Connect	ions Outlook	Save To SharePoint	Search Launch	Credentials	Proxy Licensing	
Credentials Use Defau Username:	ult Credentials					
Password: [Domain: [

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.

OnePlaceMail - Settin	gs						
SharePoint Connections	Outlook	Save To SharePoint	Search Lau	nch Cre	edentials F	Proxy Licer	nsing
Proxy Server Settings							
Use specific pr	oxy settin	gs					
No proxy							
Auto-detect							
Specify proxy s	erver						
Address:				Port:			
V Bypas	s proxy s	erver for local address	ses				
Proxy	server re	quires a password					
Usernam	e:						
Passwor	:						
Please restart Out	ook for an	y proxy settings chan	ges to take eff	ect.			
					_		
						OK	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: <u>http://www.scinaptic.com/support/oneplacemail-implementation-guide.html</u>

G OnePlaceMail - Setting	IS				
	Outlook Save To SharePoint		Credentials Pr	oxy Lice	nsing
Installed edition: Er License location*: ht	nterprise ttps://oneplacemail.sharepoint.c	om/sites/intranet/lis	ts/oneplacemail	Test Co	nnection
	How do I configure the licens Not required if OnePlaceMail Set		are installed		

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.