

# OnePlaceMail Administrator Guide | 6.6

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# 1 Getting Started

## 1.1 The Configuration Update Process

Configuration settings can be applied for a particular OnePlaceMail user or across all users, and many areas of functionality within the OnePlaceMail client can be modified by making changes to these configuration settings. The mechanism used to set/change OnePlaceMail settings is referred to as the Configuration Update Process and makes use of a file called **config\_update.xml**.

If the **config\_update.xml** file is present in the OnePlaceMail user directory when Microsoft Outlook is launched, the file will be processed for instructions to update the user's OnePlaceMail configuration. Once processed, the **config\_update.xml** file is automatically deleted from the OnePlaceMail user directory.

Typically the location of the OnePlaceMail user directory will be:

- Windows XP: Documents and Settings\<username>\Application Data\Scinaptic\OnePlaceMail
- Vista\Windows 7\8: Users\<username>\AppData\Roaming\Scinaptic\OnePlaceMail

Configuration setting updates can be made at any time using the **config\_update.xml** file. The file can be used during the initial OnePlaceMail deployment or subsequently, when business requirements or the technical environment changes.

This process enables the administrator the flexibility to deploy different client configurations for various users groups.

*It is not necessary to modify the client configuration settings when installing OnePlaceMail. The software will install with a default configuration. This configuration is described in the example configuration models section below.*

## 1.2 Enterprise Deployment of Configuration Updates

There are several ways to deploy config\_update.xml to client machines. Please find two most common of them below.

### 1.2.1 Using group policy

System Administrator may use standard Group Policy Objects to deploy config\_update.xml files among users' machines. For the detailed description of the process please refer to the following guide:

[OnePlaceMail Enterprise Deployment Using Group Policy](#)

### 1.2.2 Via custom web service

OnePlaceMail allows an organisation to create their own Web Service in SharePoint for the systematic creation and easy deployment of SharePoint filing locations to the desktop applications such as Outlook, File Explorer and Microsoft Office. The Web service can be created to adhere to relevant business rules and information available for generating the SharePoint filing locations.

For large deployments and/or where configuration updates happen frequently (e.g. adding OnePlaceMail folders when new project sites and libraries are created), **OnePlaceMail supports config\_update.xml files being dynamically generated through custom web service code**. This removes the need for administrators to deploy config\_update.xml files to user directories. The custom web service mechanism forms part of the OnePlaceMail Server SDK, refer to the SDK documentation for further details.

## 1.3 Resetting (Clearing) Client Configuration Back to Default

To clear all configuration settings and revert the client configuration back to original settings, you can delete/rename a file called config.xml that is located in the OnePlaceMail user directory. Ensure Outlook is closed, delete/rename this file, and then restart Outlook.

The location of the OnePlaceMail user directory will be dependent on the options chosen during installing the client software. Typically the path will be:

- XP: Documents and Settings\<username>\Application Data\Scinaptic\OnePlaceMail
- Vista\Windows 7: Users\<username>\AppData\Roaming\Scinaptic\OnePlaceMail

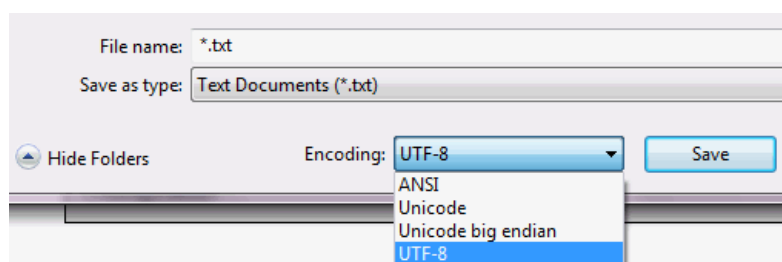
*Note: Clearing the configuration settings will result in the removal of all My OnePlaceMail folders that a user has added to Outlook.*

## 1.4 Config\_update.xml Creation Rules

The config\_update.xml file can be created using an xml authoring program or by using the Notepad.exe program available in Windows. In order to create a config\_update.xml file it is assumed that you have a basic understanding of xml files and the rules of writing valid xml.

### 1.4.1 Saving config\_update.xml

When saving the config\_update.xml file you should set the encoding type to UTF-8. This option is available in the Notepad save as dialog as shown below:



*Setting the encoding to UTF-8 is critical if your xml file contains non-English characters. Failing to do this will result in errors on Outlook startup when the config\_update.xml file is processed.*

*Note: xml is case-sensitive, please pay careful attention to the case of all tags in your xml*

### 1.4.2 Combining multiple configuration instructions in a single config\_update.xml file

The config\_update.xml file can contain a combination of instructions for updating the configuration settings. You may combine as many instructions into a single config\_update.xml as is necessary to meet your objective.

### 1.4.3 Using the action parameter to perform insert and delete operations

Most of the OnePlaceMail tags that you can enter into the config\_update.xml file have a mandatory parameter called **action**. This action parameter can have a value of **insert** or **delete**.

The rules applied for an insert action:

- If a matching tag has already been set (or changed from the default), then ignore the insert action.
- Example 1: if a library has already been added to My OnePlaceMail and an insert action is encountered that tries to insert the same library again, then the insert action is ignored.
- Example 2: if a menu item has been renamed and an insert action is encountered that tries to rename the menu item again, then the insert action is ignored.
- If no matching tag has been set, and/or the functionality has not been modified from the default then the insert action is performed.
- Example 3: if a library does not exist in a user's My OnePlaceMail folders list and an insert action occurs, then the library will be added to the user's My OnePlaceMail folders list.

The rules applied for a delete action:

- If a matching tag has already been set, then delete the matching tag (returning functionality back to the default)
- Example 4: if a library has already been added to My OnePlaceMail and a delete action is encountered, then the library will be deleted from the user's My OnePlaceMail folders list.
- Example 5: if a menu item has been previously renamed and a delete action is encountered then the previous customisation of the menu name is removed, returning the menu item back to its default (non-customised) state.
- If no matching tag has been set, and/or the functionality has not been modified from the default then ignore the delete action.
- Example 6: if a library does not exist in a user's My OnePlaceMail folders list and a delete action occurs for the library, then the delete action is ignored.

Best Practice:

It follows from the rules above that if you want to enforce a setting across all users the most reliable way is to always perform a delete action prior to performing an insert action. This is because an insert action will be ignored if an earlier insert operation has already customised the same configuration setting. This behaviour has been implemented by design so that configuration settings (modified by the user or by an earlier update process) are not accidentally lost or overwritten.

For example, if a user manually adds a SharePoint library to their My OnePlaceMail folders and sets the folder to be auto upload, then a subsequent config\_update.xml change attempts to perform an insert of this library to deploy it to all users as a non-auto upload folder, then there would be a situation where the user's auto upload setting would be overwritten.



### 1.4.4 Deleting entire sections of a configuration

---

In some situations it is difficult or impossible to create a config\_update.xml file that can issue individual delete instructions to remove items from a user's configuration file. Two practical examples of this are Site Collections and My OnePlaceMail Folders. As the user may have added Site Collection and My OnePlaceMail Folders through the OnePlaceMail menu options it is not possible to issue delete instructions to remove these (as you first need to know they are there!). You could certainly delete any that you added via an earlier config\_update.xml file.

The purpose of the <configElementDeletions> tag is to identify any delete a whole section of the config.xml file below and including the named element.

Example: Delete all Site Collections

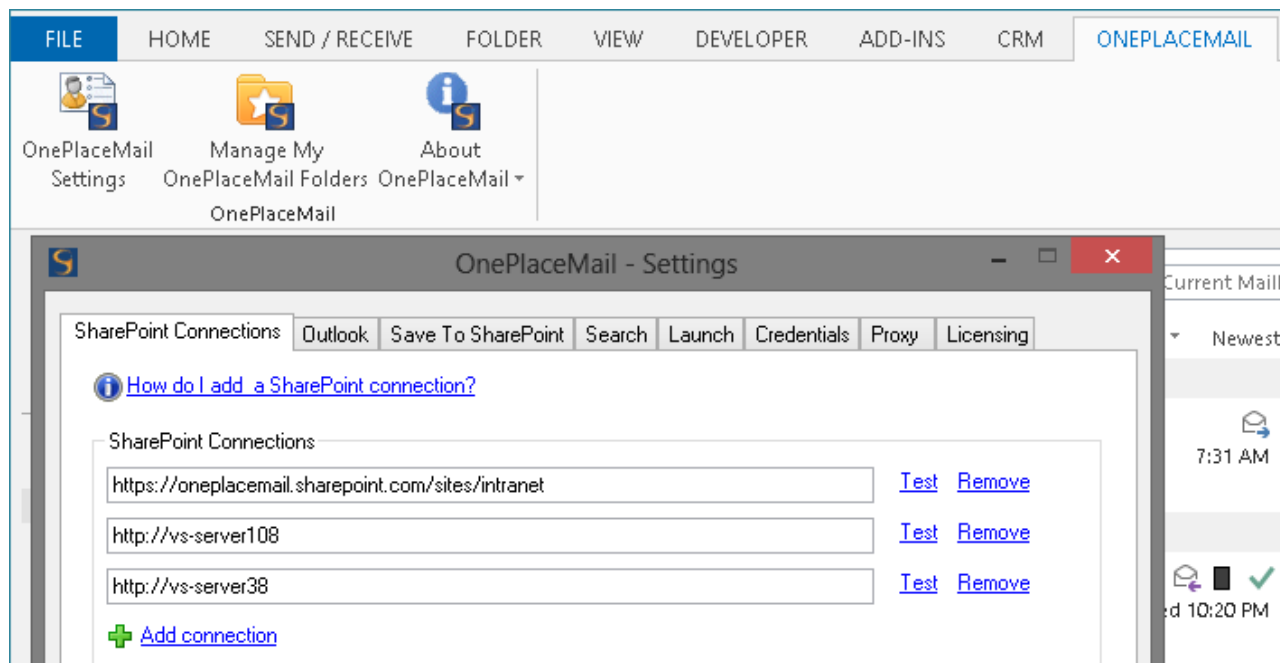
[\(Click here to open .xml file\)](#)

Example: Delete all My OnePlaceMail Folders

[\(Click here to open .xml file\)](#)

## 2 Managing SharePoint Connections and Favorite Locations

### 2.1 Managing SharePoint Connections (Site Collections)



The list of available site collections can be provided in the config\_update.xml file. The list will override all existing site collections defined in the users **OnePlaceMail > Settings** dialog.

Removing a site collection will not remove any **My OnePlaceMail** folders previously created by the user under the site collection.

Create the <siteCollections> tag and child <siteCollection> tags to specify the SharePoint site collections. You may enter multiple <siteCollection> tags, one for each site collection.

Property	Mandatory/Optional	Valid Values
action	Mandatory	Set to "insert" to insert site collection Set to "delete" to delete existing site collection setting
siteColUrl	Mandatory	The full URL to the SharePoint site collection

Example: Adds two new site collections (small and large)

[\(Click here to open .xml file\)](#)

Example: Delete two existing site collections and add two new site collections

[\(Click here to open .xml file\)](#)

*Note: there is a known issue that when deleting site collection using the delete action the siteColUrl must be all lowercase as shown in the example above.*

Example: Delete all Site Collections

[\(Click here to open .xml file\)](#)

You can prevent users from adding their own connections by using the 'Configuration Update' process.

The <siteCollectionsPermissions> tag must be inserted within opening and closing <configuration> tags.

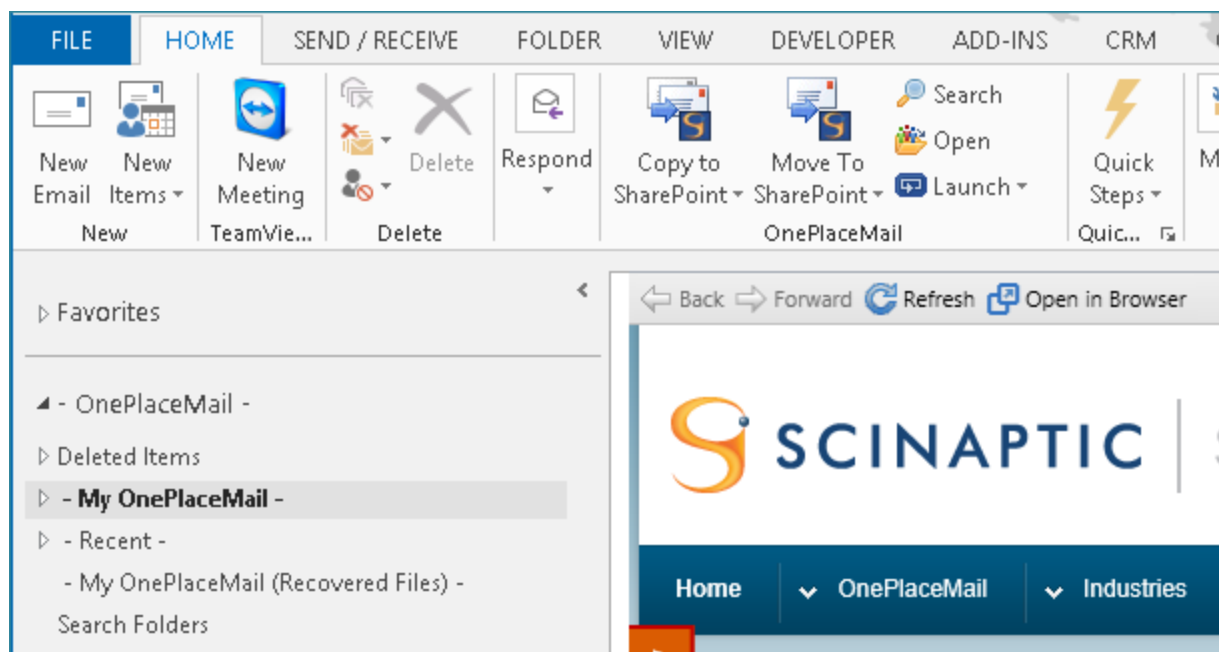
The table below describes the properties that can be modified.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
enableEdit	Mandatory	This setting allows you to control if users have the ability to add SharePoint Connections  Valid values: "true" or "false" (default is true)

Example: Prevent adding SharePoint Connections

[\(Click here to open .xml file\)](#)

## 2.2 Customizing the - My OnePlaceMail - Folder Name and Homepage



The “- My OnePlaceMail -” folder in Outlook can be customized to have a different name and URL.

To change the name and/or URL use a <rootOnePlaceMailFolder> tag. The URL of the My OnePlaceMail Folder in Outlook defaults to <http://www.oneplacemail.com> and the name defaults to “- My OnePlaceMail -”.

The <rootOnePlaceMailFolder> tag must be inserted within opening and closing <outlook> tags. The <rootOnePlaceMailFolder> tag properties are explained in the table below.

Property	Mandatory/Optional	Description
action	Mandatory	Set to “insert” to change the default behaviour Set to “delete” to revert to default behaviour
folderUrl	Optional	Text for the URL of the website
folderName	Optional	Text for the name of the folder

Example: Set the homepage URL to <http://www.scinaptic.com> and the folder name to “SharePoint Folders”.

[\(Click here to open .xml file\)](#)

Example: Reverting the My OnePlaceMail folder back to the default settings.

[\(Click here to open .xml file\)](#)

## 2.3 Customizing the - My OnePlaceMail (Recovered Files) - Folder Name

The “- My OnePlaceMail (Recovered Files) -” folder in Outlook can be customized to have a different name.

To change the name use a <recoveredFilesFolder> tag. The name of the Recovered Files folder defaults to “- My OnePlaceMail (Recovered Files) -”. This name can be changed by using a <recoveredFilesFolder> tag.

The <recoveredFilesFolder> tag must be inserted within opening and closing <outlook> tags. The <recoveredFilesFolder> tag properties are explained in the table below.

Property	Mandatory/Optional	Description
action	Mandatory	Set to “insert” to change the default behaviour Set to “delete” to revert to default behaviour
folderName	Mandatory	Text for the name of the folder

Example: Set the folder name to “SharePoint Recovered Files”.

[\(Click here to open .xml file\)](#)

Example: Reverting the My OnePlaceMail (Recovered Files) folder back to the default settings.

[\(Click here to open .xml file\)](#)

## 2.4 Customizing the - Recent - Folder

OnePlaceMail tracks the locations you recently filed to and presents them in the Navigation tree in the OnePlaceMail Save to SharePoint window for you to select as a filing location.

"- Recent -" functionality can be modified through the 'Configuration Update' process. The <recentLocations> tag must be inserted within opening and closing <userinfo> tags.

Below details the properties that can be set:

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
showInNavigationTree	Mandatory	This determines whether the 'Recents' node appears in the navigation tree in the Save to SharePoint window.  Valid values: "true" or "false" (default is true)
recentsTrackedCount	Optional	This specifies the number of 'Recents' to track.  Default value is '10'.
enabled	Optional	This setting allows you to control if users have the ability to enable/disable this feature through the OnePlaceMail Settings > Save To SharePoint tab.  Valid values: "true" or "false" (default is true)

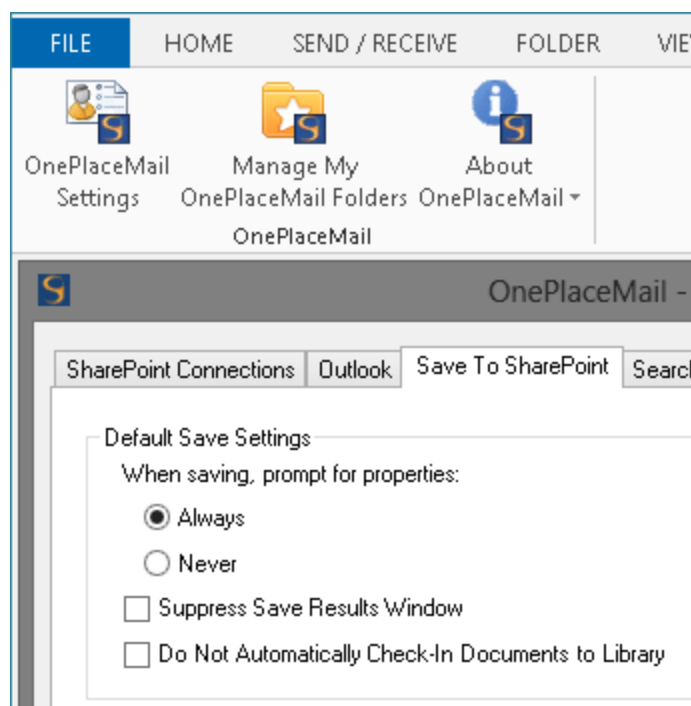
Example: Set the "- Recent -" tracked count to '25'

[\(Click here to open .xml file\)](#)

Example: Set the "- Recent -" tracked count to '25' and prevent modifying "- Recent -" in Settings dialog

[\(Click here to open .xml file\)](#)

## 2.5 Managing Default Save Settings



OnePlaceMail allows you to set 'Default Save Settings'. These settings are used by OnePlaceMail folders in "Manage My OnePlaceMail Folders" area and are the default setting when a new folder is added. They are applicable to List and Library OnePlaceMail locations only and not site folders you have added. If you want specific settings for a OnePlaceMail folder, you can uncheck the "Use Default Settings" checkbox and the folder will get its own settings.

Default Folder Settings can be set through the config\_update.xml.

Example 1: Setting Operation Mode to No Prompt (Auto Upload)

[\(Click here to open .xml file\)](#)

Settings for Operation Mode are listed in the table below:

Property	Mandatory/Optional	Valid Values
action	Mandatory	Set to "delete" to remove a setting Set to "insert" to add a setting
name	Mandatory	"operationMode"
value	Mandatory	"PromptAll" "NoPrompt"

Example 2: Setting 'Suppress Upload Results Dialog' Default Folder Setting

[\(Click here to open .xml file\)](#)

Settings for setting "suppressResultsDialog" are listed in the table below:

Property	Mandatory/Optional	Valid Values
action	Mandatory	Set to "delete" to remove a setting Set to "insert" to add a setting
name	Mandatory	"suppressResultsDialog"
value	Mandatory	"true" "false"

Example 3: Setting the 'Do Not Automatically Check-In Documents to Library':

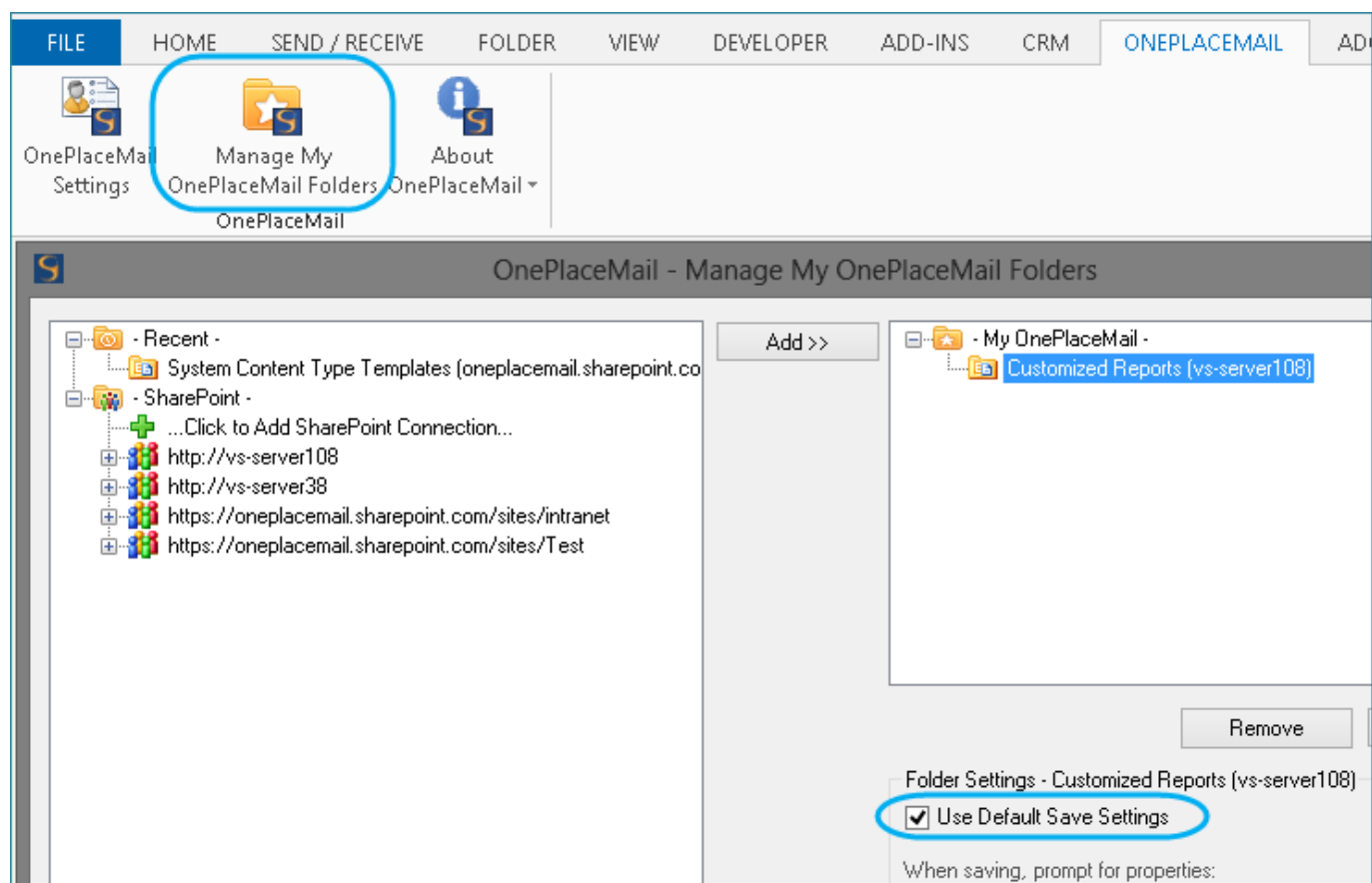
[\(Click here to open .xml file\)](#)

Settings for setting "autoCheckIn" are listed in the table below:

Property	Mandatory/Optional	Valid Values
action	Mandatory	Set to "delete" to remove a setting Set to "insert" to add a setting
name	Mandatory	"autoCheckIn"
value	Mandatory	"true" "false"



## 2.6 Manage Use Default Folder Settings



By default a user can change the Default Folder Settings for all new folders added using OnePlaceMail. However, the ability to change these settings can be disabled/enabled via the config\_update.xml.

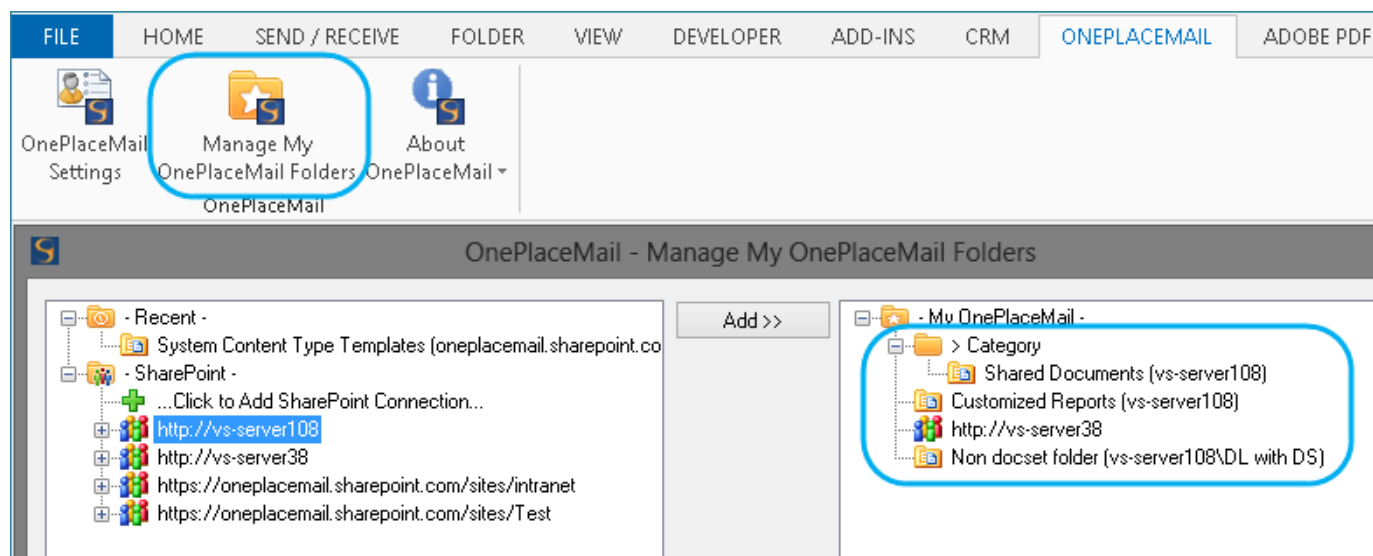
Example 1: Disable Settings Modification

[\(Click here to open .xml file\)](#)

Example 2: Re-enable Modification of Default Folder Settings (just a delete required as the default is enabled)

[\(Click here to open .xml file\)](#)

## 2.7 Managing My OnePlaceMail Folders



### Adding one or more My OnePlaceMail Folders

Example 1: Add Docs library, Tasks list, and HR Procedures folder of Company Docs libraries to My OnePlaceMail

([Click here to open .xml file](#)) Create the <outlookFolders> tag and child <outlookFolder> tags to specify the SharePoint libraries/lists or sites to add to the users My OnePlaceMail folders in Outlook. You may enter multiple <outlookFolder> tags, one for each library/list or site you wish to make available.

When libraries/lists or sites are added, there are several folder properties that can be set, these are explained in the tables below.

- Table 1: Details the possible properties if using the default folder settings (list, library, locations only)
- Table 2: Details the properties available if not using the default folder settings
- Table 3: Details the attributes that must be set if adding a site location as a OnePlaceMail location

Table 1 – Using Default Folder Settings (List and Library locations)

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to create a folder
folderName	Mandatory	The displayname to use for the folder in Outlook
listUrl	Mandatory	The full URL to the SharePoint library/list
folderUrl	Mandatory	The full URL to the SharePoint folder within the library/list. If you do not want to specify a folder within a library/list, set this property to the full URL of the library/list (i.e. folderUrl = listUrl).
isSubFolder	Mandatory	If specifying a folder within a library/list (i.e. listUrl and folderUrl are different) then set to "true", otherwise set to "false".

listType	Mandatory	The type of list. Specify "library" for Document Library or "list" for List in SharePoint.
useGlobalSettings	Mandatory	Must be set to "true" to use Default Folder Settings
path	Optional	Specify 'path' if you want the folder to appear in a category folder structure. Specify each folder name followed by a backslash for each folder. e.g. to put a folder in a category Folder "Project Documents" under a "Documents" parent category folder specify: "Documents\Project Documents"

Table 2 – Not using Default Folder Settings (List and Library locations)

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to create a folder
folderName	Mandatory	The displayname to use for the folder in Outlook
listUrl	Mandatory	The full URL to the SharePoint library/list
folderUrl	Mandatory	The full URL to the SharePoint folder within the library/list. If you do not want to specify a folder within a library/list, set this property to the full URL of the library/list (i.e. folderUrl = listUrl).
isSubFolder	Mandatory	If specifying a folder within a library/list (i.e. listUrl and folderUrl are different) then set to "true", otherwise set to "false".
listType	Mandatory	The type of list. Specify "library" for Document Library or "list" for List in SharePoint.
useGlobalSettings	Mandatory	Must be set to "false" to use Own Folder Settings (Not the Default Folder Settings)
operationMode		Valid Values are one of: "PromptAll" "NoPrompt"
autoCheckIn	Optional	This corresponds to the folder setting "Do Not Automatically Check-In Documents to this Library" in Outlook. This is an optional property and can be set to "true" or "false" (default if omitted is false)
suppressResultsDialog	Optional	This corresponds to the folder setting "Suppress Upload Results Window" in Outlook. This is an optional property and can be set to "true" or "false" (default if omitted is false)
path	Optional	Specify 'path' if you want the folder to appear in a category folder structure. Specify each folder name followed by a backslash for each folder. e.g. to put a folder in a category Folder "Project Documents" under a "Documents" parent category folder specify: "Documents\Project Documents"

*TIP: An easy way to get the folderName, listUrl, and folderUrl property values is to start Outlook and manage folders to add in all the folders you want to push out to users. Then open the config.xml file (you can find this in the OnePlaceMail user directory) and look at the <outlookFolder> tags and you can copy the folderName, listUrl, and folderUrl property values from there.*

Table 3 – Properties for a My OnePlaceMail Site location (Site locations only)

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to create a folder
folderName	Mandatory	The displayname to use for the folder in Outlook
folderUrl	Mandatory	The full URL to the SharePoint site.
isSubFolder	Mandatory	Must be set to "false"
listType	Mandatory	This must be set to "site"
useGlobalSettings	Mandatory	Must be set to "true"

#### Example 2: Adding a Site as a My OnePlaceMail location

[\(Click here to open .xml file\)](#)

#### Example 3: Removing One or More Category Folders

[\(Click here to open .xml file\)](#)

#### Removing Libraries/Lists from Users OnePlaceMail in Outlook:

Create the <outlookFolders> tag and child <categoryFolder> tags to specify the SharePoint libraries/lists to remove from the users My OnePlaceMail folders in Outlook. You may enter multiple <categoryFolder> tags, one for each category folder path you wish to remove. Note, that when you delete the category folder it deletes all folders under it in Outlook.

Property	Mandatory/Optional	Valid Values
action	Mandatory	Set to "delete" to remove a folder
path	Mandatory	The full path to the category folder

#### Modifying a My OnePlaceMail Folder

It is possible to modify any of the following properties of a folder after it has been deployed:

- List URL
- Folder URL
- The displayname of the folder (library/list)
- Operation Mode i.e. No Prompt (Auto Upload) etc.
- Suppress Upload Results Window
- Do Not Automatically Check-In Documents to this Library (applies to Libraries only)

To modify an existing folder, simply combine a folder delete and folder insert in a single config\_update.xml and deploy to users.

Example 4: config\_update.xml - changing an existing My OnePlaceMail folder auto upload property:

[\(Click here to open .xml file\)](#)

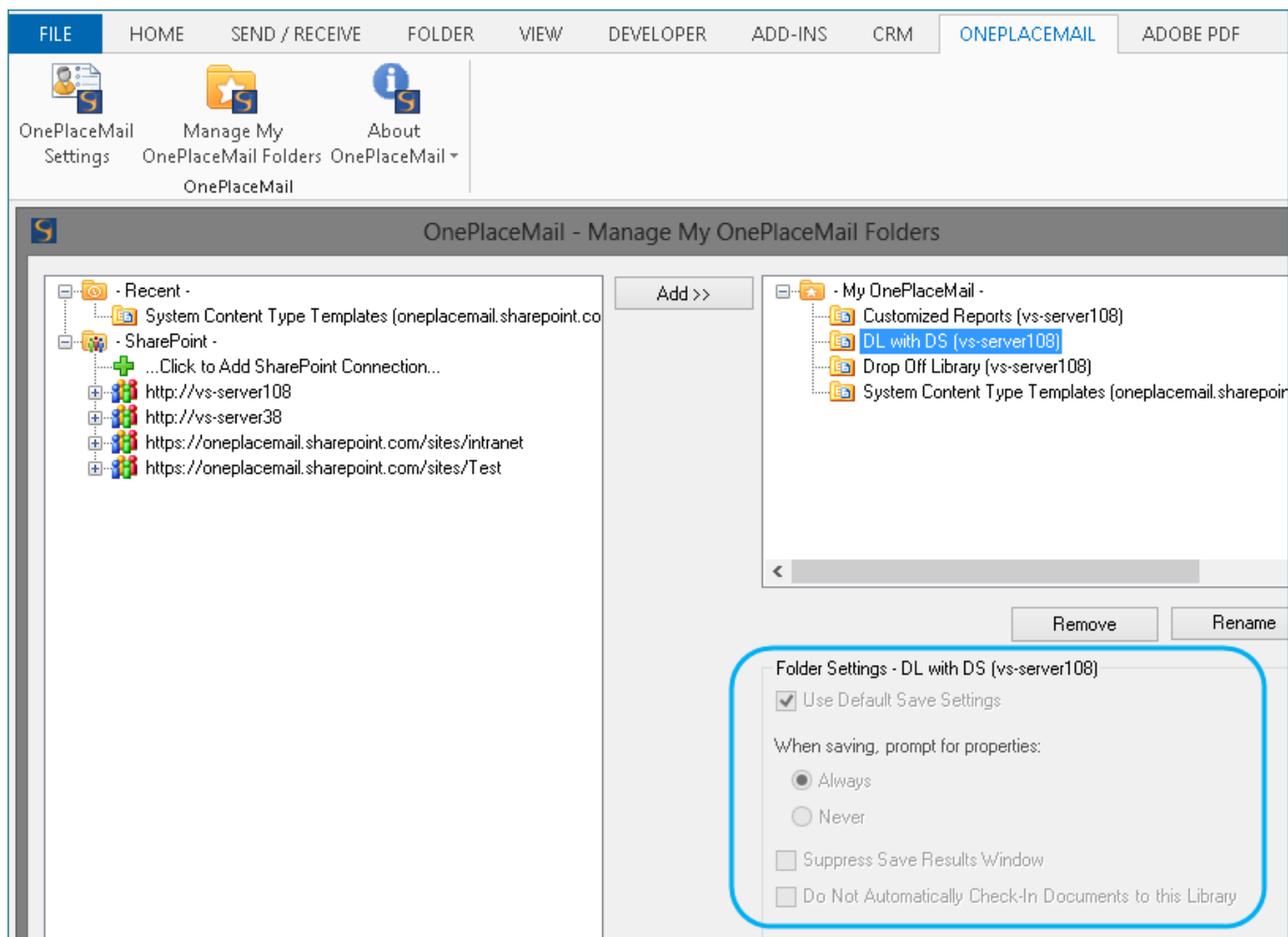
The above example will:

- Remove the existing My OnePlaceMail folder
- Add a new My OnePlaceMail folder with the supplied 'foldername', 'listUrl', 'folderUrl', 'isSubFolder', 'operationMode', and 'listType' properties.

Example 5: Delete all My OnePlaceMail Folders

[\(Click here to open .xml file\)](#)

## 2.8 Enable/Disable Folder Settings (when User Manages Folders)



The example below shows how we have disabled the ability to modify settings in Manage Folders Dialog on a folder by folder basis. This means all new folders a user adds will all use the Default Folder Settings. To re-enable the ability to edit settings in Manage Folders, we need to perform a delete action to delete the setting; we do not need to do an insert as the default for each option is enabled if no option is specified.

Example: Disable Folder Settings

[\(Click here to open .xml file\)](#)

## 3 Managing OnePlaceMail Settings / Behavior

### 3.1 UI Settings (Available Via OnePlaceMail Settings Dialog)

This section details how to deploy the settings that are available through the user interface in **Outlook | OnePlaceMail tab | OnePlaceMail Settings**. These settings can be changed directly through Outlook on a client-by-client basis directly through the OnePlaceMail Settings dialog, the configuration update options provided in this section allow you to deploy these settings to whole groups of users so that you do not have to manually configure each client.

#### 3.1.1 Welcome screen dialog

OnePlaceMail shows a Welcome Screen when a user launches Outlook after installation. This dialog provides a series of pages on how to get you up and running quickly using OnePlaceMail.

The behaviour of this dialog can be modified through the 'Configuration Update' process. . The <show StartupDialog> tag must be inserted within opening and closing <userinfo> tags.

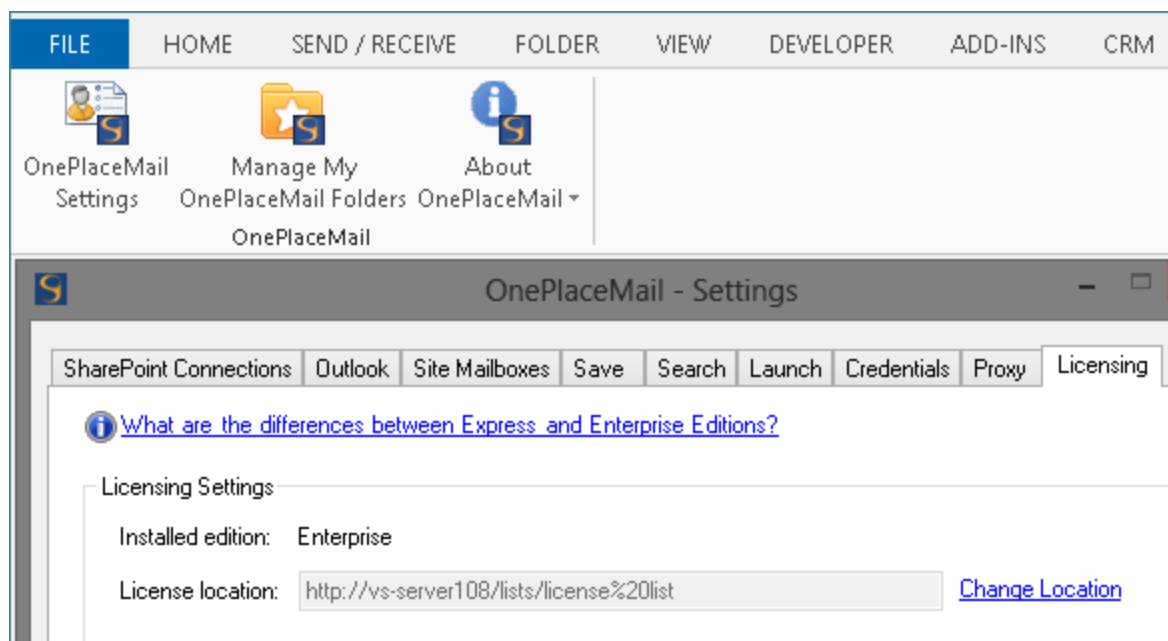
The table below describes the properties that can be modified.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
value	Mandatory	This setting determines if the Getting Started Dialog is shown (default is true).  Valid values: "true" or "false"

[\(Click here to open .xml file\)](#)

### 3.1.2 Licensing

OnePlaceMail Enterprise Edition requires licensing to be configured.



The behaviour of this dialog can be modified through the 'Configuration Update' process. The <license> tag must be inserted within opening and closing <configuration> tags.

The table below describes the properties that can be modified.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
type	Mandatory	This determines the type of license being used by OnePlaceMail  Valid values: "enterprise" or "free"
licenseLocation	Optional	This value is required if you are using 'Enterprise' licensing with no OnePlaceMail Server components installed (Client Only).  This is the location of your license list.
enabled	Optional	This setting allows you to control if users have the ability to change this feature through the OnePlaceMail Settings > Licensing tab.  Valid values: "true" or "false" (default is true)

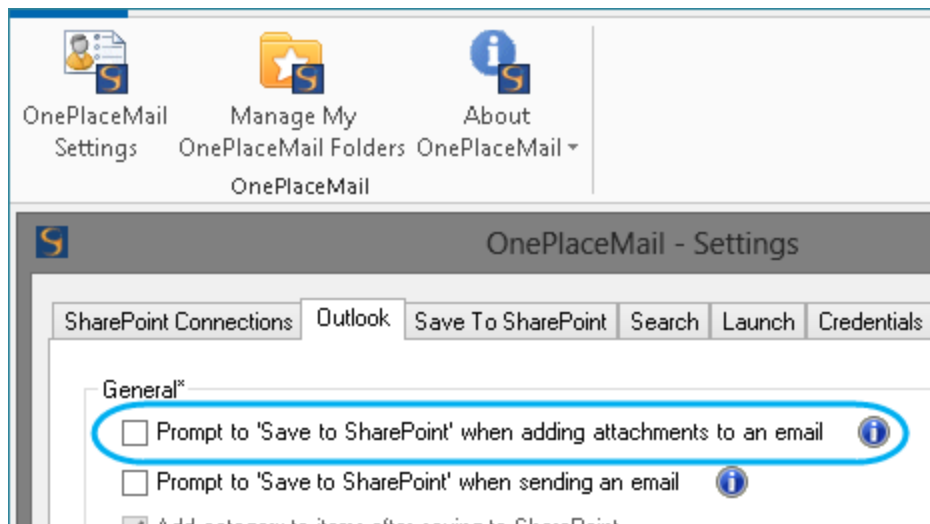
Example: Set the license location and prevent modification of licensing in Settings dialog

[\(Click here to open .xml file\)](#)



### 3.1.3 Managing 'Save to SharePoint' prompt when adding attachments to emails

OnePlaceMail prompts the user if they would like to transfer the attachment to a location in SharePoint and insert a link (in to the email) to the file in SharePoint rather than send out the file as an attachment on the email. Recipients of the email can then follow the link to access the attachment (file) that is stored in SharePoint.



To manage this feature use the <promptAttachingToEmail> tag.

The <promptAttachingToEmail> tag must be inserted within opening and closing <outlook> tags.

The promptAttachingToEmail tag properties are explained in the table below.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
value	Optional	This setting determines if the prompt is shown (default is false). Valid values: "true" or "false"
enabled	Optional	This setting allows you to control if users have the ability to enable/disable this feature through the OnePlaceMail Settings > Advanced tab. Valid values: "true or "false" (default is true)

Example: Enable the 'Save to SharePoint' prompt when adding attachments to emails.

[\(Click here to open .xml file\)](#)

Example: Disable the 'Save to SharePoint' prompt when adding attachments to emails.

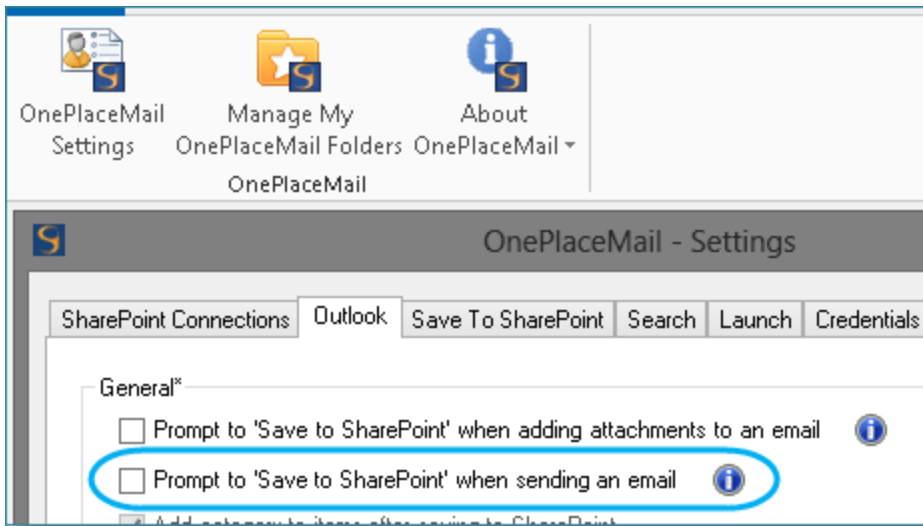
[\(Click here to open .xml file\)](#)

Example: Enable the 'Save to SharePoint' prompt when adding attachments to emails and prevent users from modifying this setting through OnePlaceMail Settings > Preferences tab

[\(Click here to open .xml file\)](#)

### 3.1.4 Managing 'Save to SharePoint' prompt when sending an email

When sending an email, OnePlaceMail prompts the user if they would like to transfer the email to a location in SharePoint and allows them to choose a location in SharePoint to upload the email to.



To manage this feature use the <promptSendingEmail> tag.

The <promptSendingEmail> tag must be inserted within opening and closing <outlook> tags.

The promptSendingEmail tag properties are explained in the table below.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
value	Optional	This setting determines if the prompt is shown (default is false). Valid values: "true" or "false"
enabled	Optional	This setting allows you to control if users have the ability to enable/disable this feature through the OnePlaceMail Settings > Advanced tab. Valid values: "true or "false" (default is true)

Example: Enable the 'Save to SharePoint' prompt when sending an email.

[\(Click here to open .xml file\)](#)

Example: Disable the 'Save to SharePoint' prompt when sending an email.

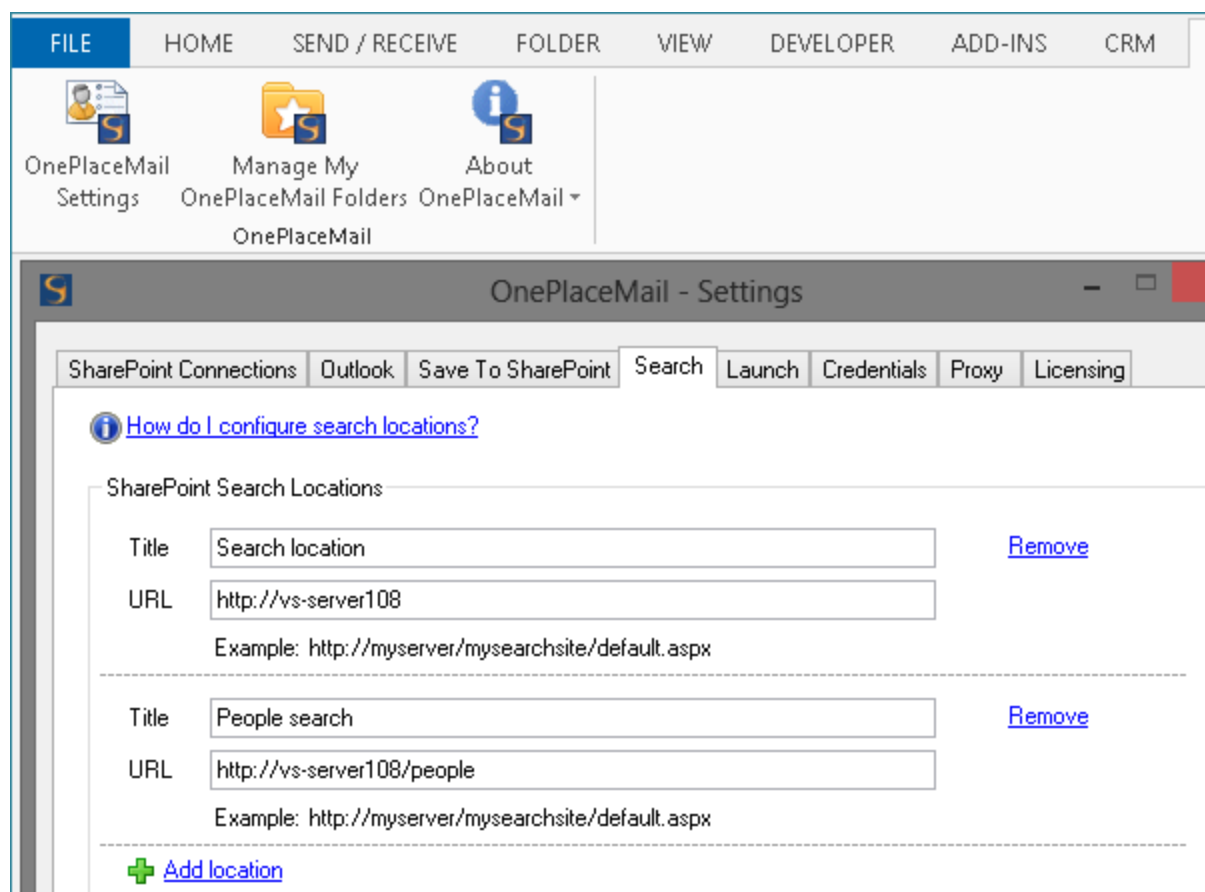
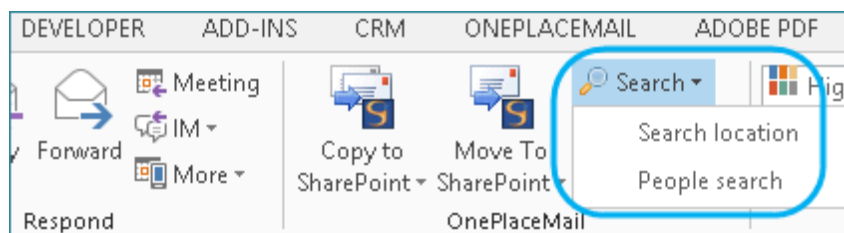
[\(Click here to open .xml file\)](#)

Example: Enable the 'Save to SharePoint' prompt when sending emails and prevent users from modifying this setting through OnePlaceMail Settings > Preferences tab

[\(Click here to open .xml file\)](#)

### 3.1.5 Managing search locations

OnePlaceMail has a Search button on the toolbar which can be configured to point to your SharePoint Search Site(s) or Search Page(s):



The URLs of the search locations can be configured through the configuration update process. The <searchLocation> tag must be inserted within opening and closing <sharepoint> and <searchLocations> tags.

The table below describes the properties that can be modified.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to add the search location
title	Mandatory	The user friendly name to display in the search dropdown menu when multiple search locations are configured
url	Mandatory	The url of your search site or search page e.g. http://portal/search/default.aspx

Example: Add a single search location (any locations already setup by the user will be preserved)

[\(Click here to open .xml file\)](#)

Example: Remove any previously configured search locations and replace with 2 new search locations

[\(Click here to open .xml file\)](#)

It is possible to lock the user out from modifying the Search Locations through the OnePlaceMail Settings dialog using the configuration update process. The <search> tag must be inserted within opening and closing <sharepoint> tags.

The table below describes the properties that can be modified.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
enabled	Optional	This setting allows you to control if users have the ability to change this feature through the OnePlaceMail Settings > SharePoint tab.  Valid values: "true" or "false" (default is true)

Example: Prevent user from modifying search locations through OnePlaceMail settings

[\(Click here to open .xml file\)](#)

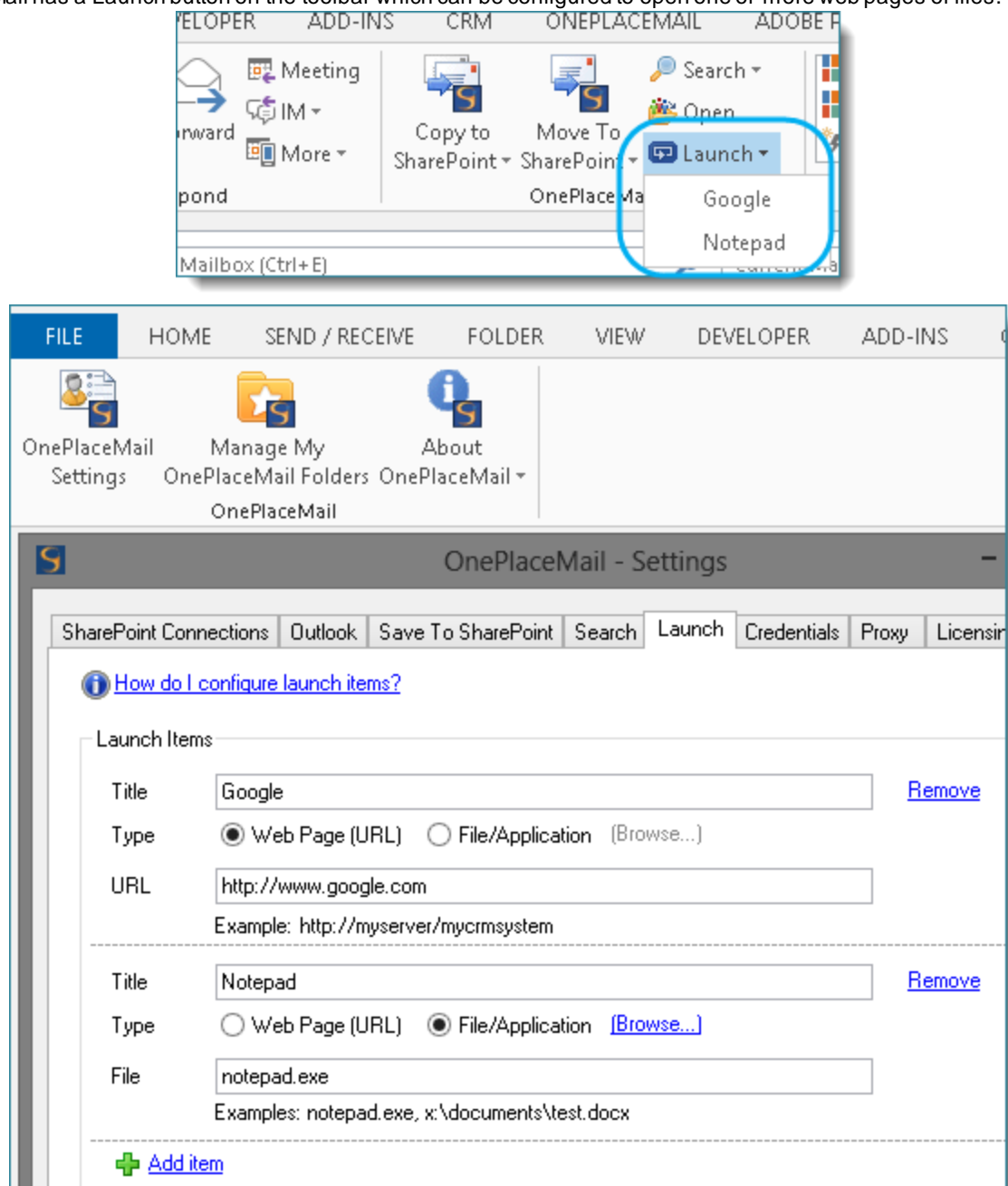
Example: Revert to allow a user to modify search locations through OnePlaceMail settings

[\(Click here to open .xml file\)](#)

### 3.1.6 Managing launch items

#### Adding and Removing Launch Items

OnePlaceMail has a Launch button on the toolbar which can be configured to open one or more web pages or files.



The launch items can be configured through the configuration update process. The <launchItem> tag must be inserted within opening and closing <launch> tags.

The table below describes the properties that can be modified.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to add the search location
title	Mandatory	The user friendly name to display in the search dropdown menu when multiple search locations are configured
type	Mandatory	Set to "URL" or "File"  URL – to launch web pages File – to launch a file or application
url	Mandatory (if type=URL)	The URL of a web page including protocol e.g. http://portal/search/default.aspx
file	Mandatory (if type=file)	The filename of a file to launch. This could be a document (e.g. c:\myworddoc.docx) or an application (e.g. notepad.exe). The full file path must be included unless the file location is included on the PATH environment variable in Windows.

Example: Add a single web page launch item (any items already setup by the user will be preserved)

[\(Click here to open .xml file\)](#)

Example: Remove any previously configured items and replace with 3 new launch items

[\(Click here to open .xml file\)](#)

It is possible to lock the user out from modifying the Launch Items through the OnePlaceMail Settings dialog using the configuration update process. The <launchSettings> tag must be inserted within opening and closing <configuration> tags.

The table below describes the properties that can be modified.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
enabled	Optional	This setting allows you to control if users have the ability to change this feature through the OnePlaceMail Settings.  Valid values: "true" or "false" (default is true)

Example: Prevent user from modifying launch items OnePlaceMail settings

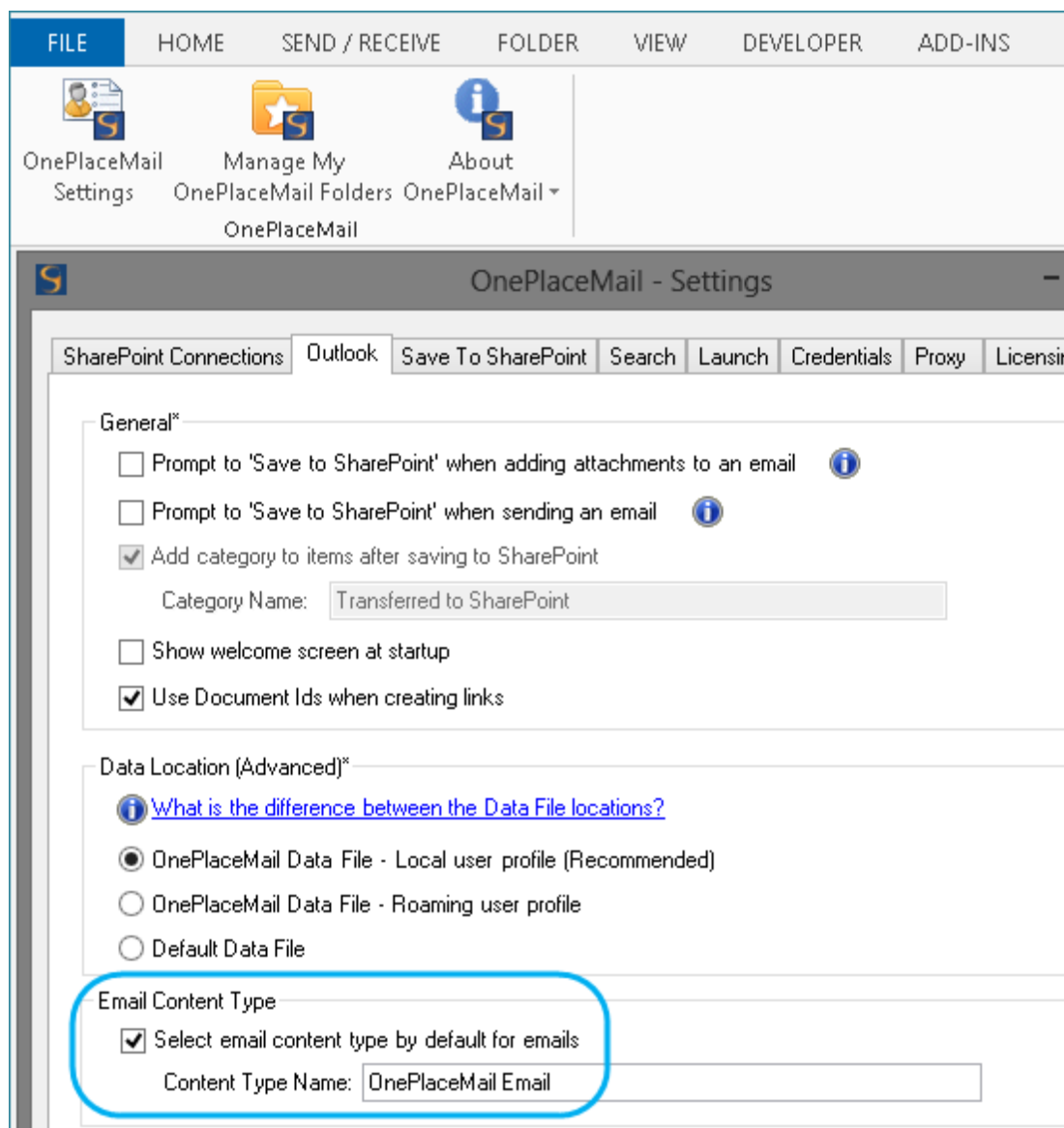
[\(Click here to open .xml file\)](#)

Example: Revert to allow a user to modify launch items through OnePlaceMail settings

[\(Click here to open .xml file\)](#)

### 3.1.7 Specifying the default email content type

The following details how to deploy a configuration update for configuring clients to use a default email content type when filing emails (.msg files) to SharePoint. If enabled, OnePlaceMail will check for the presence of this content type in the filing location and select it by default if one of the files being saved to SharePoint is an email (.msg). If saving other file types (e.g. docx, pdf, etc.) the default content type will be used.



The <emailContentType> tag must be inserted within opening and closing <configuration> tags.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
name	Mandatory	The name of the content type to use as the default for emails.



enableEdit	Optional	Prevents modification of this setting in the Settings dialog Valid values are "true" or "false"
enabled	Mandatory	Indicated whether the email content type is used by OnePlaceMail. Valid values are "true" or "false"

Example: Enable the use of an email content type called "Email Content Type"

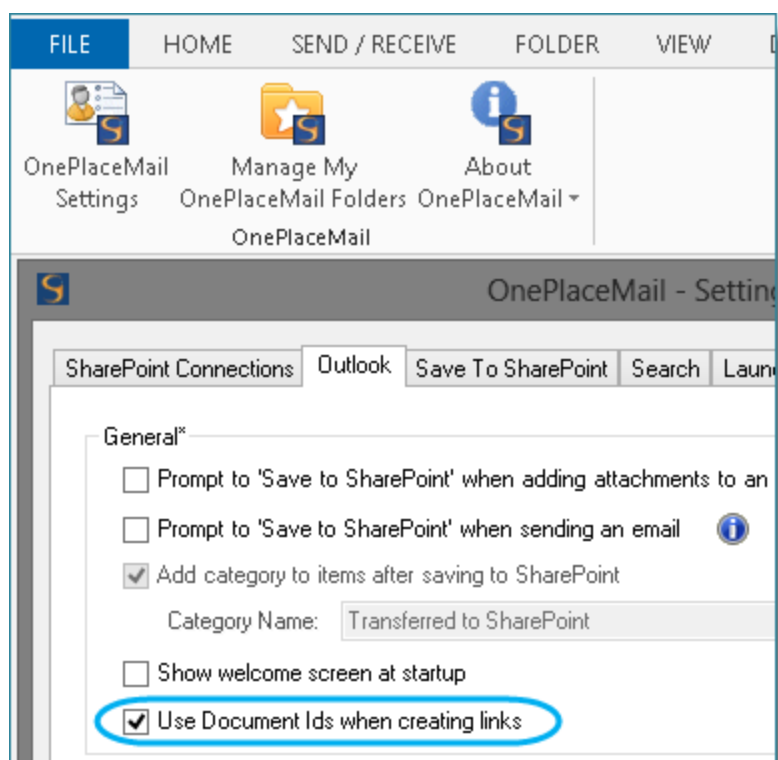
[\(Click here to open .xml file\)](#)

Example: Revert to default behaviour (use the email content type called "OnePlaceMail Email" if available in the filing location)

[\(Click here to open .xml file\)](#)

### 3.1.8 Use of document IDs in URL links

The following details how to deploy a configuration update for configuring clients, to use the Document Id URL if the Document Ids feature is enabled and available when creating links to documents in SharePoint. The default behaviour of OnePlaceMail is to use Document IDs in URLs if available.



The <useDocIds> tag must be inserted within opening and closing <outlook> tags.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
value	Mandatory	Valid values: "true" – Document Id URL will be used if available "false" – Document Id URL will not be used
enableEdit	Optional	Prevents modification of this setting in the Settings dialog Valid values are "true" or "false"

Example: Prevent the Document Id URL being used when creating links using OnePlaceMail

[\(Click here to open .xml file\)](#)

Example: Revert to default behaviour (use Document Id URLs if available)

[\(Click here to open .xml file\)](#)

### 3.1.9 Custom file type associations when opening files

---

Using the OnePlaceMail “Open from SharePoint” feature allows a user to open the files (that is stored in SharePoint) with the appropriate application. By default OnePlaceMail automatically associates Outlook, Word, Excel and PowerPoint file types with the corresponding Office application. This section details how to add, change or remove these associations.

All modifications to the file type associations are achieved by creating and deploying a file called “CustomFileTypeAssociations.xml” in the OnePlaceMail installation directory. This file effects all users on the machine.

To associate an application with a file type, the application must be available on the PATH environment variable (e.g. so you can start the application simply by typing the executable name at the Run... command)

Example 1: Add associations for .rtf files to open with Word, and .csv files to open with Excel

[\(Click here to open .xml file\)](#)

Example 2: Change the default association for .doc files to open with a custom application called MyWordView.exe

[\(Click here to open .xml file\)](#)

Example 3: Remove the default association for .ppt and .pptx files so they cannot be opened in PowerPoint and users only get the option to open in browser

[\(Click here to open .xml file\)](#)

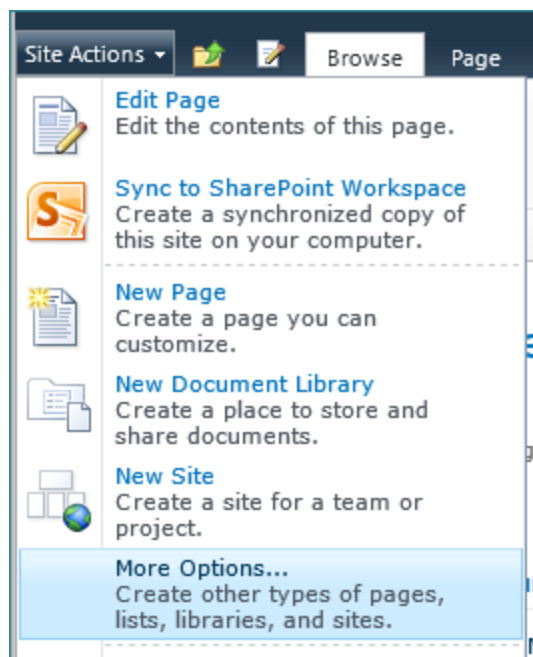
### 3.1.10 Custom mapping of email attributes to columns – SharePoint

By default OnePlaceMail will automatically capture email attributes (To, From, Subject etc.) and populate associated SharePoint columns. The OnePlaceMail Email Library Template (in SharePoint) & OnePlaceMail Email Content Type are pre-configured to have columns of the correct name to facilitate the automatic upload of the email properties. Mapping email properties to your own columns in SharePoint can be achieved by using a Central Column Mapping list.

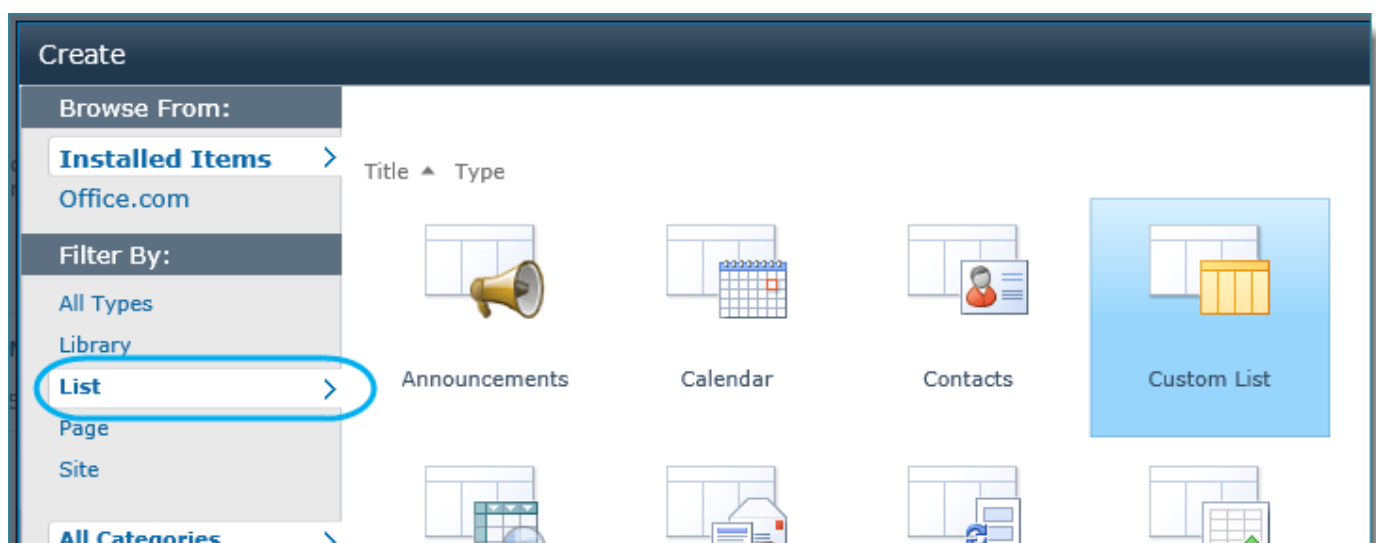
#### Create the central column mapping list in SharePoint

This step will help you to create the Central Column Mapping list in SharePoint:

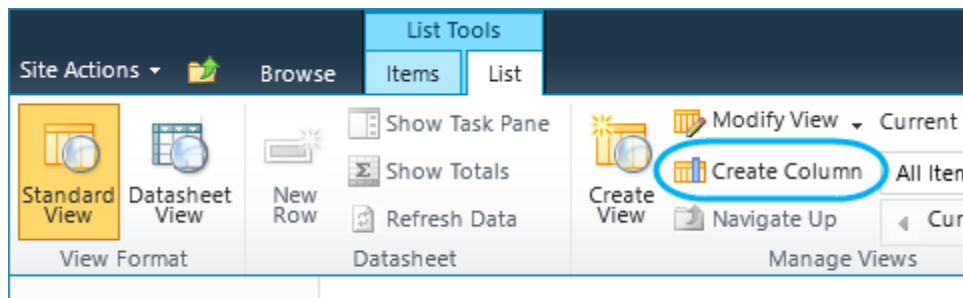
1. Select a SharePoint site on which to create the Central Column Mapping list. All OnePlaceMail users must have access to read the Central Column Mapping list so keep this in mind when selecting a site to host the list.
2. In Internet Explorer navigate to the site to create the list on. Click **Site Actions > More options... > Lists**



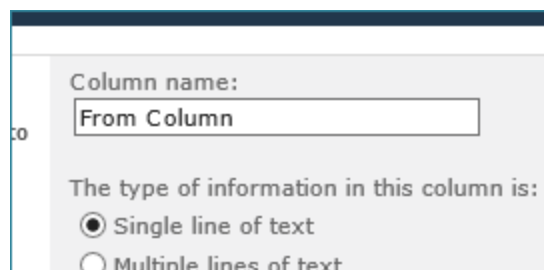
3. Create a new **Custom List**



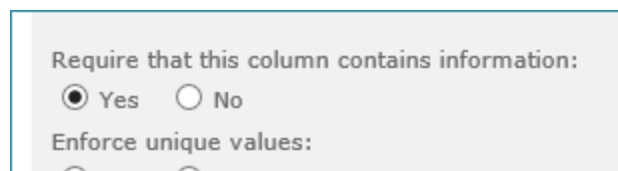
4. Specify a **Name** for the list (you can give the list any name you choose) and click **Create**
5. Add a new column to the list by selecting **List > Create Column**



6. Specify the column name as **From Column**. It is important to use this exact column name and case is important, make sure From starts with a capital F and Column with capital C.



7. Change **Require that this column contains information** to **Yes**



8. **Leave all other column settings as default**, and click **OK** to create the column
9. Add a new column to the list by selecting **Settings > Create Column**

10. Specify the column name as **To Column**. It is important to use this exact column name and case is important, make sure To starts with a capital T and Column with capital C.

Column name:

The type of information in this column is:  
☒ Single line of text  
☐ Multiple lines of text

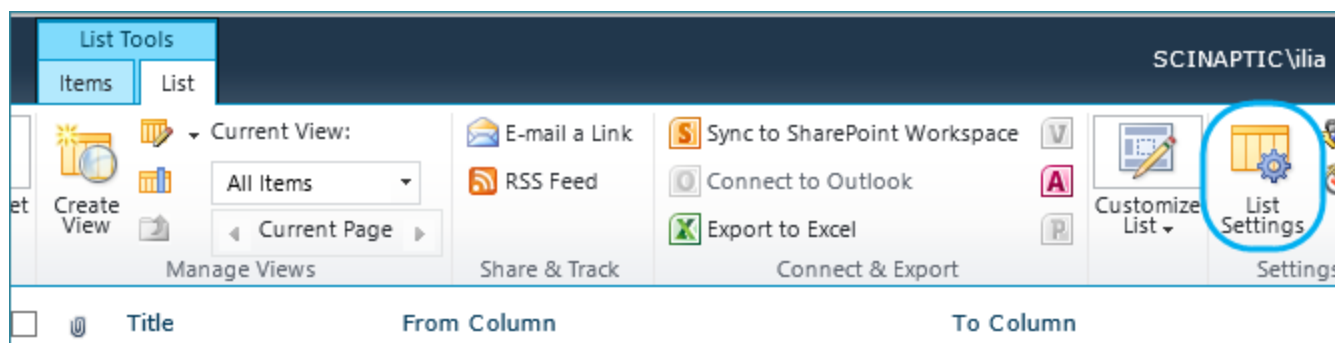
11. Change **Require that this column contains information** to **Yes**

Require that this column contains information:  
☒ Yes ☐ No

Enforce unique values:  
☐ ☐

12. **Leave all other column settings as default**, and click **OK** to create the column

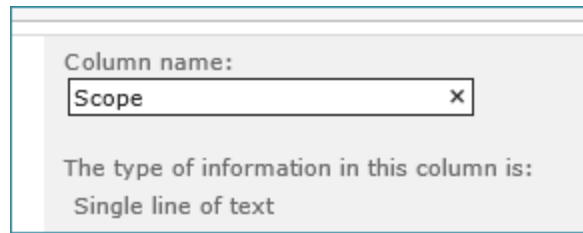
13. Open the list settings by clicking **List > List Settings**



14. Click on the **Title** column to edit

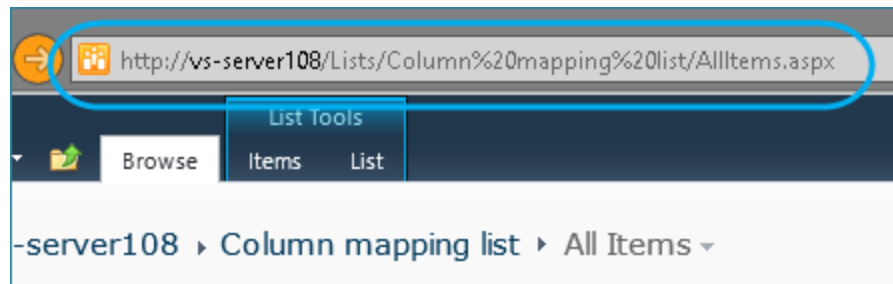
Columns	
A column stores information about each item in the list.	
Column (click to edit)	Type
Title	Single line of text
From Column	Single line of text
To Column	Single line of text

15. Change the column name from **Title** to **Scope**



A dialog box with a light gray background. At the top, it says "Column name:". Below this is a text input field containing the word "Scope". To the right of the input field is a small "x" icon. Below the input field, it says "The type of information in this column is:" followed by "Single line of text".

16. Take note of the **URL to the list**, as we need to register this URL within the OnePlaceMail.

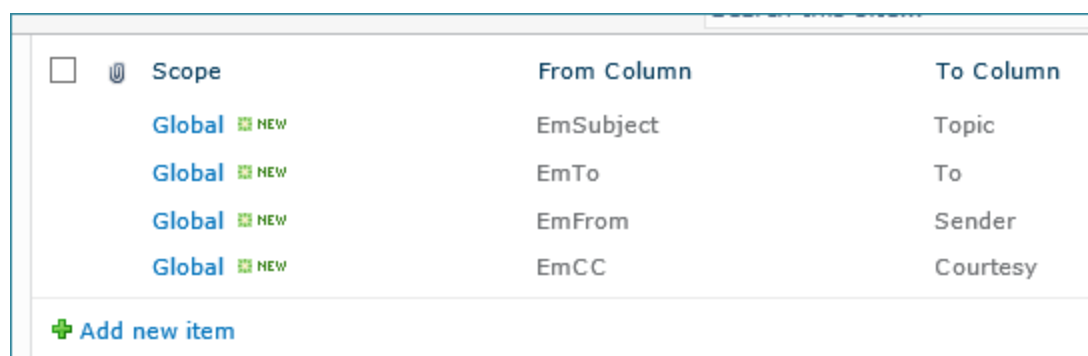


## Populate the central column mapping list

The table below details the properties used when creating a mapping item.

Property	Mandatory/Optional	Description
Scope	Mandatory	This must be set to "Global"
From Column	Mandatory	<p>This is the reserved OnePlaceMail column names that match the email property.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>EmSubject</li> <li>EmTo</li> <li>EmToAddress</li> <li>EmCC</li> <li>EmBCC</li> <li>EmFrom</li> <li>EmFromName</li> <li>EmDateSent</li> <li>EmDateReceived</li> <li>EmType (derived based on user filing)</li> <li>EmDate (derived based on EmType)</li> <li>EmID</li> <li>EmAttachCount</li> <li>EmAttachmentNames</li> <li>EmCon</li> <li>EmConversationID</li> <li>EmConversationIndex</li> <li>EmCategory</li> <li>EmBody</li> <li>EmSensitivity</li> <li>EmImportance</li> <li>EmToSMTPAddress</li> <li>EmCCSMTPAddress</li> <li>EmBCCSMTPAddress</li> <li>EmFromSMTPAddress</li> <li>EmHasAttachments</li> <li>EmSentOnBehalfOfName</li> <li>EmReceivedOnBehalfOfName</li> <li>EmCompanies</li> <li>EmRetentionPolicyName</li> <li>EmReplyRecipientNames</li> <li>EmReplyRecipients</li> </ul>
To Column	Mandatory	This is the internal name of the column you want the email property to be stored in.

The image below shows a Column Mapping list configured with example mappings.



Scope	From Column	To Column
Global <small>NEW</small>	EmSubject	Topic
Global <small>NEW</small>	EmTo	To
Global <small>NEW</small>	EmFrom	Sender
Global <small>NEW</small>	EmCC	Courtesy

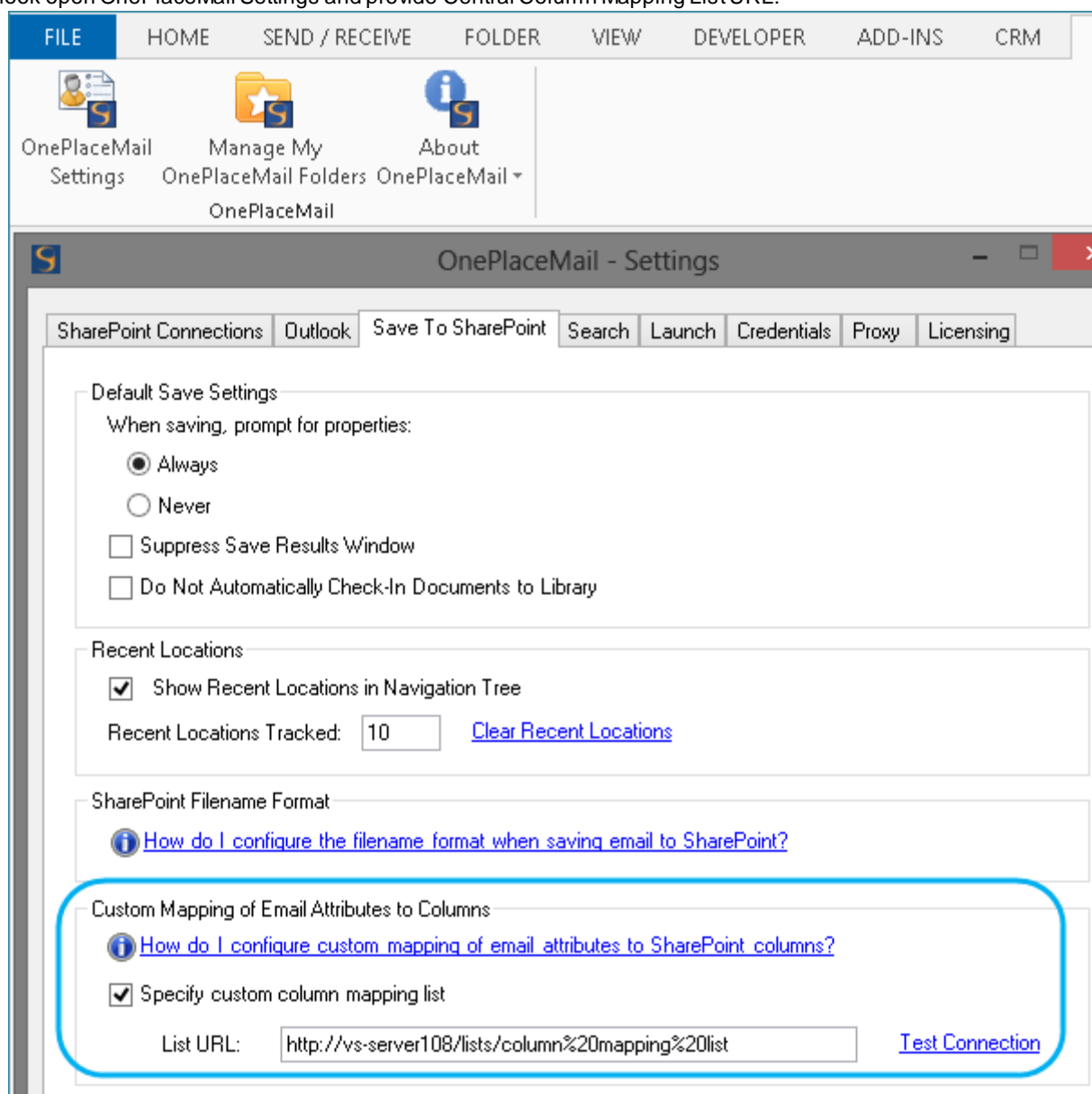
[+ Add new item](#)





## Changing client settings

In Outlook open OnePlaceMail Settings and provide Central Column Mapping List URL:



Column mapping will take effect immediately and will apply to all users and all document libraries and lists in SharePoint when using OnePlaceMail.

### 3.1.11 Custom mapping of email attributes to columns – client settings

The following details showing how to deploy a configuration update for configuring clients to use the column mapping list in SharePoint.

The <columnMapping> tag must be inserted within opening and closing <configuration> tags.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
useColumnMappingUrl	Mandatory	Valid values: "true" or "false"
listUrl	Optional	If useColumnMappingUrl ="true", determines the URL of the column mapping list in SharePoint.  E.g. <a href="http://portal/OPM1/Lists/OnePlaceMail%20Column%20Mapping">http://portal/OPM1/Lists/OnePlaceMail%20Column%20Mapping</a>
enabled	Optional	This setting allows you to control if users have the ability to change the Custom Mapping configuration.  Valid values: "true or "false" (default is true)

Example: Use custom mapping list at the URL <http://portal86/sites/sitecol2/lists/columnmappinglist> and do not allow the user to modify these settings

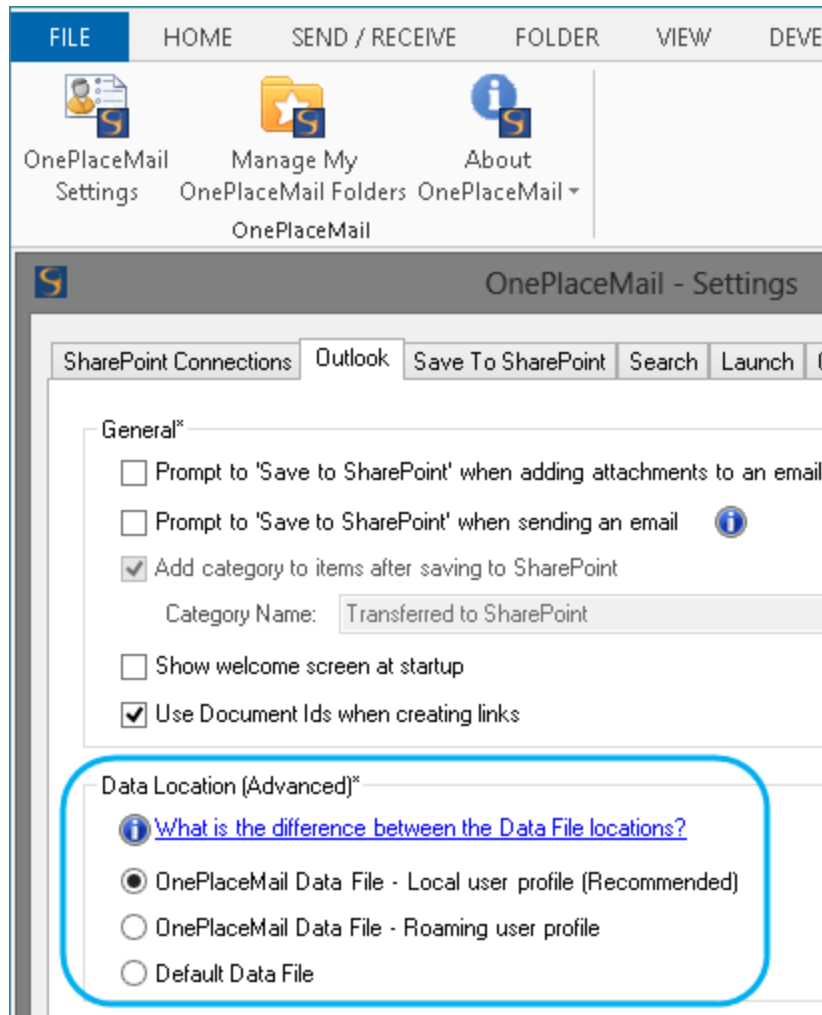
[\(Click here to open .xml file\)](#)

Example: Use custom mapping list at the URL <http://portal86/sites/sitecol2/lists/columnmappinglist> and allow the user to modify these settings

[\(Click here to open .xml file\)](#)

### 3.1.12 Data location (advanced)

*Note: This functionality is not supported in Outlook 2003*



You can use OnePlaceMail in three modes:

- OnePlaceMail Data File – Local user profile (Recommended)
- OnePlaceMail Data File – Roaming user profile
- Default Data File

The default is to use 'OnePlaceMail Data File Local user profile (Recommended)' in which OnePlaceMail folders are added to a dedicated local OnePlaceMail .pst file in the user's local windows profile.

In 'OnePlaceMail Data File – Roaming user profile' mode the OnePlaceMail folders are added to a dedicated local OnePlaceMail.pst in the users roaming windows profile.

In 'Default Data File' mode, OnePlaceMail uses the users default mail store (either Microsoft Exchange or local mail .pst file) for adding OnePlaceMail folders to.

This setting can be set via the configuration update process and the ability to change it through 'OnePlaceMail Settings' can be enabled/disabled by an Administrator.

To enable this feature use the <usePST> tag.

The <usePST> tag must be inserted within opening and closing <outlook> tags.

The usePST tag properties are explained in the table below.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
value	Mandatory	This setting determines if the prompt is shown (default is false). Valid values: "true" or "false"
profilePath	Optional	This setting applies if the "value" attribute above is set to "true". Valid values: "local" for local windows profile or "roaming" for roaming windows profile
enabled	Optional	This setting allows you to control if users have the ability to enable/disable this feature through the OnePlaceMail Settings > Outlook tab. Valid values: "true" or "false" (default is true)
folderName	Optional	This setting allows you to change the name of the root folder of the PST as it appears in Outlook
folderUrl	Optional	This setting allows you to set the folder homepage of the root folder of the PST

Example: Enable the 'OnePlaceMail Data File' mode.

[\(Click here to open .xml file\)](#)

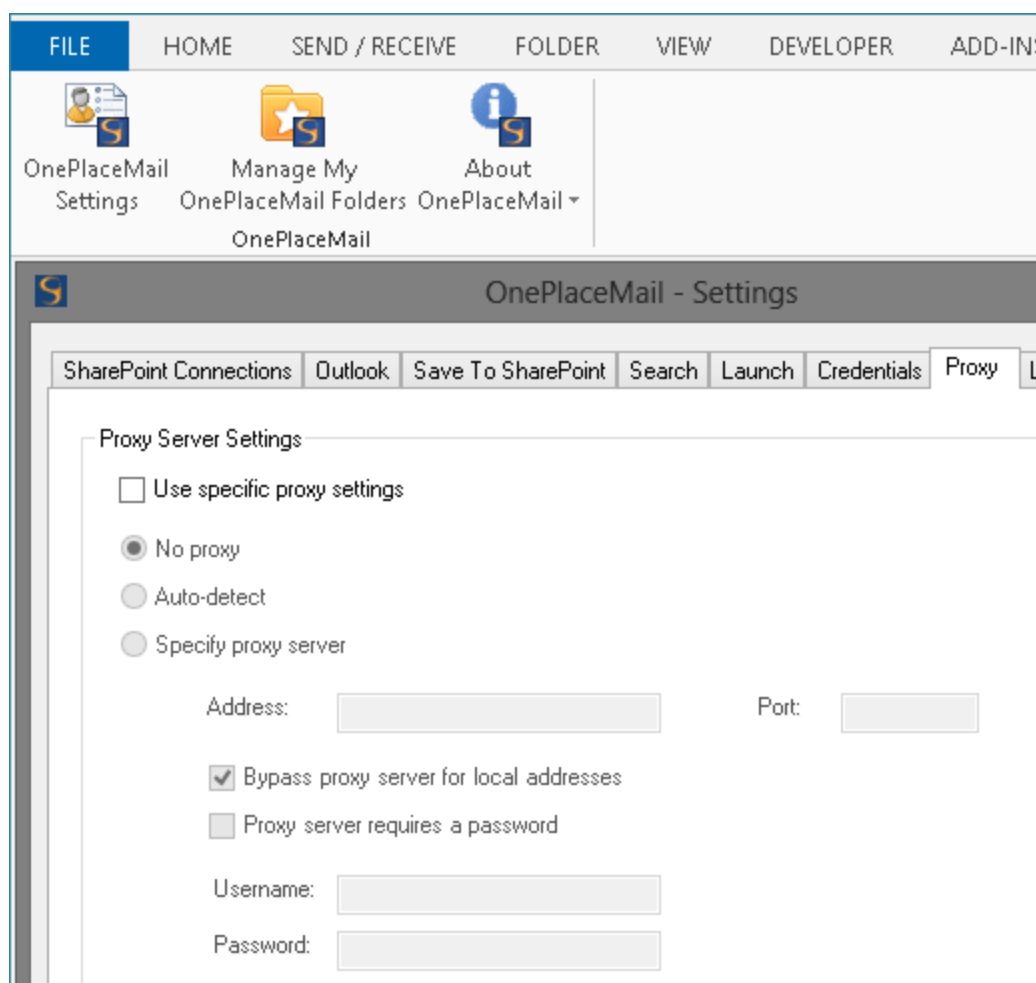
Example: Use 'Default Data File' mode

[\(Click here to open .xml file\)](#)

Example: Use 'OnePlaceMail Data File' and prevent the user changing the Data File mode in OnePlaceMail Settings – Outlook tab

[\(Click here to open .xml file\)](#)

### 3.1.13 Proxy settings



OnePlaceMail allows you to configure your proxy server settings. These settings can be configured through the 'Configuration Update' process.

The <proxyServer> tag must be inserted within opening and closing <configuration> tags.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
proxyUseSpecificSettings	Mandatory	This determines whether OnePlaceMail uses OnePlaceMail Proxy Settings.  Valid values: "true" or "false" (default is false)
proxyMode	Optional	If using Specific Proxy settings, determines the type of Proxy being used.  Valid values are "noproxy" or "manual" or "autodetect"
proxyAddress	Optional	If using 'proxyMode' with a value of "manual", is the proxy server address.
proxyPort	Optional	If using 'proxyMode' with a value of "manual", is the proxy server port.

proxyBypassLocal	Optional	If using 'proxyMode' with a value of "manual", is the bypass on local addresses proxysetting.
proxyRequiresPassword	Optional	If using 'proxyMode' with a value of "manual", specifies whether a specific username and password are required for the proxyserver (not default credentials).  Valid values: "true" or "false" (default is false)

Example: Use No Proxy

[\(Click here to open .xml file\)](#)

Example: Use auto-detect Proxy

[\(Click here to open .xml file\)](#)

Example: Use manual proxy with bypass local addresses

[\(Click here to open .xml file\)](#)

## Automatically detect proxy settings

Due to performance issues connecting to web services OnePlaceMail does not use the "Automatically Detect Settings" feature of web browsers to connect to web services. This setting is set in the **SendToHandler.exe.config** file located in the OnePlaceMail install directory (by default C:\Program Files\Scinaptic\Scinaptic OnePlaceMail).

To enable this feature delete the following section from the **SendToHandler.exe.config** file and save on each client desktop:

```
<system.net>
  <defaultProxy>
    <!-- Disable Autoproxy-->
    <proxy autoDetect="False"/>
  </defaultProxy>
</system.net>
```

### 3.1.14 Preview Settings

The screenshot shows the 'OnePlaceMail - Settings' dialog box with the 'Preview' tab selected. The dialog has a title bar with a blue 'S' icon and standard window controls. Below the title bar is a tabbed interface with tabs for 'SharePoint', 'Outlook', 'Preview' (selected), 'Site Mailboxes', 'Save', 'Search', 'Launch', 'Credentials', 'Proxy', and 'Licensing'. The 'Preview' tab contains the following sections:

- How do I configure local preview settings?** (with an information icon)
- Thresholds for Local Preview**: Two input fields. 'Warning size (KB):' is set to 200, and 'Maximum size (KB):' is set to 4000.
- File Types**: A section titled 'Revert to client-side preview when SharePoint preview is not available for the file types:'. It contains four radio buttons: 'All' (selected), 'None', 'All Except', and 'None Except'. Below the radio buttons is a text input field for file extensions, with a note: '(separate each file extension with a semi colon e.g. .docx;.msg;.xls)'. The field is currently empty.
- Preview Cache**: A section with a 'Maximum size (MB):' input field set to 100, and a 'Clear preview cache' link.

At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

OnePlaceMail allows you to configure preview settings to control the behaviour. If SharePoint based preview is not enabled on your SharePoint farm via Office Web Apps OnePlaceMail will revert to using local preview (client side) preview. In order to perform a local preview, content must be downloaded from SharePoint. To make the performance as optimal as possible we cache content locally. So that performance is not impacted we put controls in place to warn users of large files they are about to download or stop the download of the file completely and allow you to enable/disable preview just for specific file types.

The <localPreview> tag must be inserted within opening and closing <configuration> and <outlook> tags.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
enableEdit	Optional	This setting determines if the preview settings are editable in the settings dialog by the user (default is true).  Valid values: "true" or "false"



thresholdDownloadNoWarnings	Optional	This setting sets the 'Warning Size (KB)'. The default is 200KB. The value is the kilobyte value as a whole number e.g.  thresholdDownloadNoWarnings="200"
thresholdDownloadNever	Optional	This setting sets the 'Maximum Size (KB)'. The default is 4000KB. The value is the kilobyte value as a whole number e.g.  thresholdDownloadNever="1000"
type	Optional	This setting sets the types of files that can be previewed using local preview. The default is 'All'. Valid values are: "All", "None", "AllExcept" or "NoneExcept" e.g.  type="None"
extensions	Optional	This value is only required if you have specified "AllExcept" or "NoneExcept" for the 'type' value above. e.g.  type="AllExcept" extensions=".docx" to allow local preview of all file types except .docx files.
maxCacheSizeInBytes	Optional	This setting allows you to set the maximum cache size in Bytes for the local preview e.g.  maxCacheSizeInBytes="104857600"

Example: Disable edit of preview settings

[\(Click here to open .xml file\)](#)

Example: Disable local preview for a file type

[\(Click here to open .xml file\)](#)

Example: Set threshold sizes and preview cache size

[\(Click here to open .xml file\)](#)

### 3.1.15 Navigation Tree Location Search Settings

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

Recent Locations

☒ Show Recent Locations in Navigation Tree

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

Location Search

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

☒ First site collection added (default)

☐ Specific site collection

☐ Disable search across site collections

Search query mode:

☐ Keyword query language search (default)

☒ Title property search

Location Filtering

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

☒ 'Starts with' typed characters (default)

☐ 'Contains' typed characters

The OnePlaceMail navigation tree (that allows you to browse SharePoint environments and access your favorites and recents) also supports searching for locations. The following settings modify the behaviour of this search for locations.

The search service setting determines how farm wide searches are performed, this setting can be set using the `<searchLocation>` tag which must be inserted within opening and closing `<configuration>` and `<navigationTree>` tags.

Typically you would use this setting if you have connections to multiple SharePoint farms and need to specify which farm the search should be performed against.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
mode	Mandatory	Valid values: "auto" – uses search services associated with first site collection added to OnePlaceMail. This is the default setting. "custom" – uses the search service associated with the site collection specified in the "url" property "off" – disables farm wide search. A scoped search (below a selected node on the navigation tree is still enabled).
url	Mandatory if mode="custom"	This setting is only used when mode="custom". This specifies a site collection url e.g. <a href="http://myserver">http://myserver</a> . OnePlaceMail will use the search service associated with the site collection to perform the farm wide search.

Example: Specify that site wide searches should use the search service associated with http://vs -server38

[\(Click here to open .xml file\)](#)

Example: Disable farm wide search

[\(Click here to open .xml file\)](#)

The search query mode setting determines how keywords entered into the search box are processed, this setting can be set using the <searchMode> tag which must be inserted within opening and closing <configuration> and <navigationTree> tags.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
mode	Mandatory	Valid values: "kql" – Keyword Query Language syntax. This supports free text keyword query and property queries in the same format accepted by the search through SharePoint user interface. This is the default setting. "title" – This restrict the search to just match the keywords entered with the title property of locations in SharePoint

Example: Set the search querymode to "title"

[\(Click here to open .xml file\)](#)

Example: Set the search querymode to "kql" (Keyword Query Language)

[\(Click here to open .xml file\)](#)

### 3.1.16 Navigation Tree Filter Settings

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

**Recent Locations**

☒ Show Recent Locations in Navigation Tree

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

**Location Search**

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

☒ First site collection added (default)

☐ Specific site collection

☐ Disable search across site collections

Search query mode:

☐ Keyword query language search (default)

☒ Title property search

**Location Filtering**

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

☒ 'Starts with' typed characters (default)

☐ 'Contains' typed characters

The OnePlaceMail navigation tree allows filtering of nodes to quickly locate an item by filtering as you type characters. The behavior of how the filtering operates can be changed from a 'starts with' matching algorithm, to a 'contains' algorithm.

The filter mode setting determines this behavior and can be set using the `<filterMode>` tag which must be inserted within opening and closing `<configuration>` and `<navigationTree>` tags.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
mode	Mandatory	Valid values: "startswith" – This filters the tree to match items that start with the characters typed. This is the default setting. "contains" – This filters the tree to match items that contain the characters typed.

Example: Set the filter mode to "content"

[\(Click here to open .xml file\)](#)

Example: Set the filter mode to "startswith"

[\(Click here to open .xml file\)](#)

## 3.2 Non-UI Settings (Only Available Via Config Update)

### 3.2.1 Configuring SharePoint content browsing within OnePlaceMail

#### Using a list/library view to drive the list of folders or content

By default, OnePlaceMail will give you all items in a library/list and all folders. However, the list presented can be based on a view in a library/list so that the content is filtered based on how the view is configured in SharePoint.

OnePlaceMail will always look for a view called "Content View" in a library/list in SharePoint to present the list of content (not folders). If this view is present it will be used to drive the selection content in the OnePlaceMail Insert, Open and Save dialogs and the embedded view in Outlook. In terms of the location content, the view's columns, sorting, grouping and filtering criteria will be used and presented in the dialogs.

OnePlaceMail will always look for a view called "Content View Navigation" in a library/list in SharePoint to present the list of folders to select in the navigation tree of OnePlaceMail. If this view is present it will be used to drive the list of folders in the navigation tree of the OnePlaceMail Insert, Open and Save dialogs and the embedded view in Outlook.

The view name that OnePlaceMail looks for can be modified through the configuration update process.

The view behaviour can be configured through the configuration update process by using the <contentViews> tag and child <contentView> tags.

The table below describes the properties that can be modified on the <contentView> tag.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
type	Mandatory	Valid value: "default" – this view will be used to drive content (not folders) in all dialogs "navigationtreefolders" – if specified will use this view only when getting the list of folders in a library/list.
name	Mandatory	The name of the view to use

Example: Modifying the view to use to drive the list of all content and folders

[\(Click here to open .xml file\)](#)

Example: Modify the view to use for location content and the list of folders

[\(Click here to open .xml file\)](#)

If no config\_update.xml is applied OnePlaceMail will look for a view called "Content View". If this is present in a library/list it will be used to drive the list of content/folders in the selected location.

## Setting the Initial Items Load Count in Open, Insert and Save dialogs

In large libraries/lists there can be thousands of items. Rather than let OnePlaceMail load in all items in the library which can be a time consuming exercise, we limit the number of items loaded in initially. The default is to load in the first 500 items of a library/list. OnePlaceMail will then present a 'Get All Items' link if the number of items exceeds 500.

The number of items to be loaded in initially can be modified to any number suitable to your requirements.

To enable this feature use the <LocationContent> tag. The <LocationContent> tag attributes are detailed below:

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
firstPageResultsCount	Mandatory	This setting the number of items initially loaded

Example: Setting the initial load to 250 items

[\(Click here to open .xml file\)](#)

### 3.2.2 Customizing the email filename format

The format of the filename that is created when transferring email messages can be modified by using the <filenameMethod> tag. OnePlaceMail provides you with the option of choosing one of our predefined standard email filename formats or alternatively creating your own custom format. Our predefined email formats ensures that the filename length fits within the limits set by all versions of SharePoint. If you use your own custom filename format it is up to you to ensure that the filename length fits within the limits of your version of SharePoint.

By default the filename will use the email subject and append an underscore and a unique hash code (the Email Sent Date/Time encoded as Base 64 text) e.g. ACME project information\_vf65c8.

The following filename formats are available:

Filename Format	Example	Description
default:  <email subject>_<hashcode(email sent date/time)>	ABC project information_vf65bmt2	<ul style="list-style-type: none"> <li>- Prevents duplicate emails being filed within a library (across all users)</li> <li>- Adds minimal additional length to subject</li> </ul>
title_datecurrentuser:  <email subject>_<hashcode(email sent date/time + unique characters to user filing)>	ACME project information_vf65bmt2	<ul style="list-style-type: none"> <li>- Prevents a single user filing duplicate emails within a library</li> <li>- Adds minimal additional length to subject</li> </ul>
senton_sendername_title:  <email sent date>_<email sent time>_<email sender>_<email subject>	2008-10-24_21-01-23_Jim Smith_Weekly Project Update	<ul style="list-style-type: none"> <li>- Prevents duplicate emails being filed within a library (across all users)</li> <li>- Provides legible date/time/sender information in subject</li> <li>- Allows chronological sort of email by subject</li> <li>- Adds additional length to subject</li> </ul>
custom	[sentdateutc#yyyy-MM-dd_HH-mm-ss]_[sendernamesubject#49#_] [subject]_[sentdateutc#yyyy-MM-dd]	<ul style="list-style-type: none"> <li>- Allows you to specify your own custom format based on predefined tokens – explained below</li> </ul>

*Note: When filing draft email all file formats use the email creation date/time (rather than the sent date/time) and the current user (rather than the sender).*

To use an alternate email filename format (other than the default), make use of the <filenameMethod> tag which must be inserted within opening and closing <outlook> tags.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
value	Mandatory	Valid values: "senton_sendername_title" "title_datecurrentuser" "custom"
customFileFormat	Mandatory if using custom format	If using "custom" in value attribute above specifies the custom filename format based upon predefined token values
maximumFileNameLength	Optional	Allows you to specify the maximumFileNameLength if using the email subject in the filename.

Example: Use <email sent date>\_<email sent time>\_<email sender>\_<email subject> format



[\(Click here to open .xml file\)](#)

Example: Revert the filename format back to the default

[\(Click here to open .xml file\)](#)

Example: Use <email subject>\_<unique characters to user> format

[\(Click here to open .xml file\)](#)

## Custom Email Filename formats

Custom Filename Formats allow you to create your own filename format. This is useful if one of the default filename formats we provide above does not match your requirements. We provide several predefined tokens as provided in the table below. You can use any combination of these tokens and the tokens can be added to any filename you provide – the tokens are simply replaced by the actual values taken dynamically from the email. Tokens allow you to specify additional optional parameters which must be prefixed with #.

Token	Parameters Mandatory/Optional	Parameters	Description
[sentdatelocal]	Optional	datetimeformatstring	<p>Uses the local date time of the users' current time zone in the email filename for the sent date.</p> <p>Examples:</p> <p>[sentdatelocal] uses the default date time format string "yyyy-MM-dd_HH-mm-ss"</p> <p>[sentdatelocal#yyyy-MM-dd] uses a custom datetime format which includes only the year month and day of the email sent date.</p> <p>It is important to note that using the local date time of the user can cause duplicate emails to be saved.</p> <p>Only datetime separators that are valid in filenames are supported e.g. HH-mm-ss not HH:mm:ss as ':' is not supported in filenames.</p>
[sentdateutc]	Optional	datetimeformatstring	<p>Uses the utc datetime of the sentdate in the email filename.</p> <p>Examples:</p> <p>[sentdatelocal] uses the default date time format string "yyyy-MM-dd_HH-mm-ss"</p> <p>[sentdatelocal#yyyy-MM-dd] uses a custom datetime format</p>

			<p>which includes only the year month and day of the email sent date.</p> <p>It is important to note that using the utc date time helps prevent duplicate emails being saved to the same location in SharePoint.</p>
[sendernamesubject]	Mandatory	maxlength separator	<p>Uses a combination of the sender and subject and a separator character to separate the values. The maxlength specifies the maximum length of the sender and subject combined. Examples:</p> <p>[sendernamesubject#49#-] [sendernamesubject#60#_]</p>
[subject]	Optional	maxlength	<p>The subject of the email.</p> <p>Examples: [subject] The default subject length is 49 characters [subject#100] The subject length of 100 characters</p>
[sendername]	Optional	maxlength	<p>The email senders name.</p> <p>Examples: [sendername] The default is to return the entire senders name. [sendername#10] The sendername length of 10 characters</p>
[uniquehash]	N/A	N/A	<p>Unique hash code for email based on the sent datetime of the email. Useful in combination with the email subject and sender.</p>
[uniquehashuser]	N/A	N/A	<p>Unique hash code for email based on the sent datetime of the email plus the initials of the person filing the email</p>

Example filenames using tokens and the corresponding config\_update.xml example:

CompanyPrefix\_[subject]\_[sendername]\_[uniquehash]

[\(Click here to open .xml file\)](#)

[subject]-[sendername]-[sentdateutc#yyyy-MM-dd]

[\(Click here to open .xml file\)](#)

CompanyPrefix\_[sendername]\_[subject]\_[uniquehash]\_CompanyText

[\(Click here to open .xml file\)](#)

Prefix123\_[sendernamesubject#50#\_]\_[uniquehash]\_ProjectEmail

[\(Click here to open .xml file\)](#)

[sentdateutc#yyyy]\_[subject#30]

[\(Click here to open .xml file\)](#)

[subject]\_[sentdateutc#dd-MM-yyyy]

[\(Click here to open .xml file\)](#)

As you can see from the examples above, the tokens can be used in any order with different parameters where appropriate combined with static text at any spot in the filename. This creates incredible flexibility in naming your emails when filing to SharePoint.

Further custom Date / Time format strings can be found via the following Microsoft article: [http://msdn.microsoft.com/en-us/library/8kb3ddd4\(v=vs.110\).aspx](http://msdn.microsoft.com/en-us/library/8kb3ddd4(v=vs.110).aspx)

### 3.2.3 Illegal character stripping from filenames

OnePlaceMail (by default) strips out illegal characters when creating the filename for an email or an attachment and replaces them with an underscore. To provide a custom set of rules to define which characters get stripped you can provide your own regular expression (regex) statement.

To enable this feature use the <filenameIllegalCharactersRegEx> tag.

The <filenameIllegalCharactersRegEx> tag must be inserted within opening and closing <outlook> tags. You must also insert a <![CDATA[<sup>^</sup>a-zA-Z0-9\x0020&ÆÄÅæ]]> which is a regular expression. Replace "<sup>^</sup>a-zA-Z0-9\x0020&ÆÄÅæ" with your own regex statement.

Example: prevent stripping of letters, numbers, spaces, and some Norwegian language characters.

[\(Click here to open .xml file\)](#)

Example: Disable the Illegal Custom Character Stripping (reverts to default)

[\(Click here to open .xml file\)](#)

*When saving the config\_update.xml file, setting the encoding to UTF-8 is critical if your xml file contains non-English characters*

### 3.2.4 Character stripping from email/file properties

OnePlaceMail can be configured to strip out specific characters from email or file properties and replace them with an underscore. To provide a custom set of rules to define which characters get stripped you can provide your own regular expression (regex) statement.

To enable this feature use the `<filePropertiesIllegalCharactersRegEx>` tag.

The `<filePropertiesIllegalCharactersRegEx>` tag must be inserted within opening and closing `<sendToHandler>` tags. You must also insert a `<![CDATA[<filePropertiesIllegalCharactersRegEx>]]>` which is a regular expression. Replace "`<filePropertiesIllegalCharactersRegEx>`" with your own regex statement, characters matching the regex statement will be stripped.

Example: prevent some Norwegian language characters.

[\(Click here to open .xml file\)](#)

Example: Disable the Custom Character Stripping (reverts to default)

[\(Click here to open .xml file\)](#)

*When saving the config\_update.xml file, setting the encoding to UTF-8 is critical if your xml file contains non-English characters.*

### 3.2.5 Capture the email body as column meta-data – emails

By default, the Body of an email message is not captured as SharePoint column meta-data when successfully transferring an email to SharePoint. To enable the capture of the email body as column meta-data use a <captureEmailBodyForEmail> tag.

The <captureEmailBodyForEmail> tag must be inserted within opening and closing <outlook> tags.

The captureEmailBodyForEmail tag properties are explained in the table below.

Property	Mandatory/Optional	Description
action	Mandatory	Set to “insert” to change the default behaviour Set to “delete” to revert to default behaviour
value	Mandatory	Valid values: “true” or “false”

Example: Enable the capture of Email Body for email.

[\(Click here to open .xml file\)](#)

Example: Reverting back to default behaviour

[\(Click here to open .xml file\)](#)

**Note:** You must also have a column called EmBody created in your SharePoint environment to store the Email Body.

### 3.2.6 Capture the email body as column meta-data – attachments

By default, the Body of an email message is not captured as SharePoint column meta-data when successfully dragging and dropping an attachment from an email. To enable the capture of the email body as column meta-data use a <captureEmailBodyForAttachment> tag.

The <captureEmailBodyForAttachment> tag must be inserted within opening and closing <outlook> tags.

The captureEmailBodyForAttachment tag properties are explained in the table below.

Property	Mandatory/Optional	Description
action	Mandatory	Set to “insert” to change the default behaviour Set to “delete” to revert to default behaviour
value	Mandatory	Valid values: “true” or “false”

Example: Enable the capture of Email Body for email.

[\(Click here to open .xml file\)](#)

Example: Reverting back to default behaviour

[\(Click here to open .xml file\)](#)

**Note:** You must also have a column called *EmBody* created in your SharePoint environment to store the Email Body. This column is a part of OnePlaceMail Sandbox Solution or can be created manually.

### 3.2.7 Suppressing (hiding) meta-data columns from the file upload window

Specific SharePoint columns that appear in the OnePlaceMail File Upload Window (allowing users to enter meta-data) can be suppressed so that the column does not appear by using the <columnsToSuppressFromFileUploadWindow> and child <columnToSuppress> tags.

The <columnToSuppress> tag must be inserted within opening and closing <columnsToSuppressFromFileUploadWindow> tags.

The columnToSuppress tag properties are explained in the table below.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to suppress a column Set to "delete" to remove a column suppression
name	Mandatory	The name of the column to suppress (this is the SharePoint displayname not the internal name).
list	Optional	A list/documentlibraryurl e.g. http://portal/lists/announcements.  If specified, this will suppress the column only for the designated list. If a column with this name appears in other lists/document libraries then it will not be suppressed from the File Upload Window.
contentType	Optional	The name of a content type in SharePoint e.g. Document  If specified, this will suppress the column only for the designated content type. If a column with this name appears in other content types then it will not be suppressed from the File Upload Window.

Example: Suppress a column called HideMe from all document libraries and all content types.

[\(Click here to open .xml file\)](#)

Example: Suppress a column called HideMe only in the Announcements list.

[\(Click here to open .xml file\)](#)

Example: Suppress a column called HideMe only for the Document content type.

[\(Click here to open .xml file\)](#)

Example: Suppress a column called HideMe only for the Document content type within the Shared Documents document library.

[\(Click here to open .xml file\)](#)

Example: Remove a column suppression so that the column is visible again.

[\(Click here to open .xml file\)](#)

### 3.2.8 Custom list definitions – client only

These configuration update settings are only applicable if you are using OnePlaceMail without OnePlaceMail Server Components installed.

*If you are using the complementary OnePlaceMail Server Components please use the Server Configuration utility to list the custom list definitions available to select as OnePlaceMail filing locations.*

OnePlaceMail has a default set of list and library types that it supports for selecting favourite filing locations from and for browsing SharePoint for to select a filing destinations. OnePlaceMail allows you to specify custom list definition ids that are not part of the default set. This is useful if you have specific custom list definitions you have implemented as part of your SharePoint farm deployment.

The <listDefinition> tag must be inserted within opening and closing <customListDefinitions> and <configuration> tags.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to add support for the custom list definition Set to "delete" to remove support for the custom list definition
serverTemplate	Mandatory	The list/library server template Id

Example: Adding a custom list definition with a server template id of 30001:

[\(Click here to open .xml file\)](#)

### 3.2.9 Sent items prompt time

If you are using an Exchange Mail box with OnePlaceMail on more than 1 machine and you are using the "Prompt to Save To SharePoint" setting in OnePlaceMail you may get prompted to upload emails to SharePoint on the second machine when configuring the Exchange account on the other machine.

To prevent this from occurring you can use a config\_update.xml setting. The setting allows you to configure a time in seconds from the Sent Time of the emails for which you should still be prompted in Outlook. If the time in seconds is greater than this, OnePlaceMail will not prompt to send the email to SharePoint. The default is 60 seconds but can be adjusted to your requirements.

Below details the tag properties:

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
value	Mandatory	Time in seconds

Example: Set Sent item Prompt time to 45 seconds.



[\(Click here to open .xml file\)](#)

Example: Set back to default Prompt settings.

[\(Click here to open .xml file\)](#)

### 3.2.10 Getting configuration updates from a custom web service

This setting enables the Refresh Configuration menu/ribbon option, where configuration updates are retrieved from a custom web service developed using the OnePlaceMail Server SDK.

The <configUpdateSettings> tag must be inserted within opening and closing <configuration> tags. Below details the tag properties:

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
url	Mandatory	The absolute url of the SharePoint server (including protocol) hosting the custom web service. e.g. http://SharePointServer01

Example: Enable configuration updates from a custom web service hosted on <http://SharePointServer01>.

[\(Click here to open .xml file\)](#)

*Note: Applying this setting using the config\_update.xml file applies it on a user-by-user basis. Please refer to the OnePlaceMail Server SDK documentation regarding mechanisms to apply this setting to all users on a machine.*

### 3.2.11 Disabling preview of SharePoint content

This setting is used to disable preview of SharePoint files and items within OnePlaceMail.

The <filePreview> tag must be inserted within opening and closing <configuration> tags. Below details the tag properties:

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
enabled	Mandatory	Valid values: true (default) false

Example: Disable file preview

[\(Click here to open .xml file\)](#)

### 3.2.12 Setting default SharePoint folder viewing style in Outlook

This setting is used to determine the default style for viewing SharePoint content within Outlook. The user is able to change between SharePoint and Outlook style using buttons on the Outlook ribbon menu. Therefore if you are wanting to enforce users only access SharePoint through a single style this setting is best used in combination with hiding the ribbon button that allows the user to change styles.

The <outlookFolderCurrentViewStyle> tag must be inserted within opening and closing <configuration> and <userInfo> tags. Below details the tag properties:

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
value	Mandatory	Valid values: Outlook (default) SharePoint

Example: Set the default viewing style to SharePoint

[\(Click here to open .xml file\)](#)

### 3.2.13 Setting the maximum number of results for Navigation Tree location searches

This setting is used to modify the maximum number of search results that are returned when performing a location search from the Navigation Tree.

The <search> tag must be inserted within opening and closing <configuration> and <navigationTree> tags. Below details the tag properties:

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
maxSearchResults	Mandatory	Maximum number of search results e.g. 5

Example: Set the maximum number of search results to 5

[\(Click here to open .xml file\)](#)

## 4 Visual Customizations

### 4.1 Customizing OnePlaceMail Menu - Outlook 2007

All OnePlaceMail menu items, toolbar buttons, and the Send & File button within Outlook can be modified to have different text descriptions (captions) and can be made visible/invisible to the user.

<menulitem> tags must be inserted within opening and closing <outlookMenu> tags.

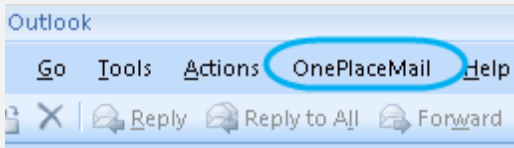
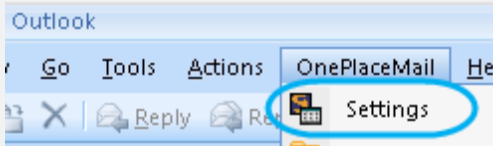
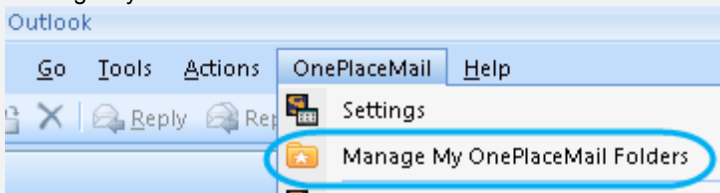
Example 1: Remove the entire **OnePlaceMail** menu from Outlook





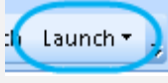
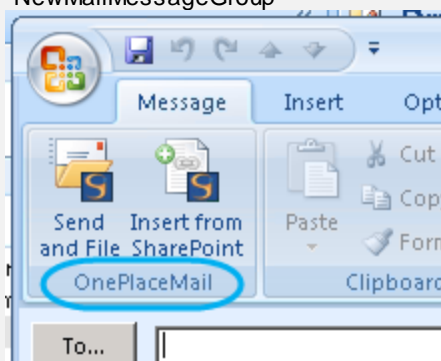


[\(Click here to open .xml file\)](#)

Example 2: Rename OnePlaceMail menu items and the **Copy To SharePoint** toolbar button and the **Move To SharePoint** toolbar button.

[\(Click here to open .xml file\)](#)

Create one <menulitem> entry for each item you wish to modify the behaviour of. To hide a menu item from a user, define the menu item to specify a visible attribute and set it to false (default if not specified is true).

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
tagName	Mandatory	Valid values are: "OnePlaceMail"  "Settings"  "Manage My OnePlaceMail Folders" 

		<p>"OPMSharePointButton"</p>  <p>"OPMMoveToSharePointButton"</p>  <p>"OPMOpenFromSharePointButton"</p>  <p>"OPMSearchSharePointButton"</p>  <p>"OPMLaunchButton"</p>  <p>"NewMailMessageGroup"</p>  <p>"SendAndFileButton"</p>  <p>"InsertFromSharePointButton" – The Insert from SharePoint ribbon button when composing email</p> 
--	--	--

		"Refresh Configuration" – Sub menu item (only visible if configUrlSettings have been set)
visible	Optional	Valid values are "true" or "false". The default is "true" if this is not specified.
caption	Optional	The textual description of the menu item as you want it to be displayed to the user.

To modify existing menu item configurations you have to perform a **delete** and **insert** of the new menu item in the same configuration update process.

Example 3: Updating the **OnePlaceMail** menu item

[\(Click here to open .xml file\)](#)

Example 4: Hide the **Move to SharePoint** and **Copy to SharePoint** toolbar buttons (limits user to only perform drag-drop transfer to My OnePlaceMail folders).

[\(Click here to open .xml file\)](#)

Example 5: Hide the **Send & File** toolbar button when composing email

[\(Click here to open .xml file\)](#)

## 4.2 Customizing OnePlaceMail Menu - Outlook 2010/2013

Button labels and visibility are customized using the <ribbonObject> tag.

The <ribbonObject> tag must be inserted within a hierarchy of opening and closing <toolsForOffice><[OfficeApplicationName]><ribbonCustomisations> tags as shown below:

```
<toolsForOffice>
```

```
    <Outlook>
```

```
        <ribbonCustomisations>
```

```
            <ribbonObject /> tags go here
```

```
        </ribbonCustomisations>
```

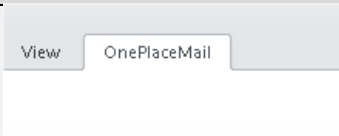
```
    </Outlook>
```

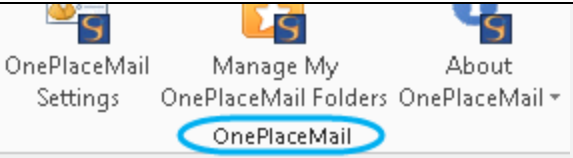






```
</toolsForOffice>
```


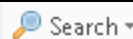

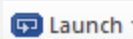
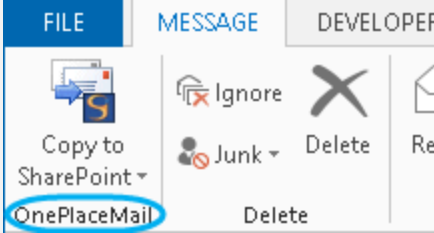
The ribbonObject tag properties are explained in the table below.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
tag	Mandatory	This property identifies the ribbon item to customise (tab, tab group, button etc)
label	Optional	Specify a value for this property to give a ribbon item a custom label
visible	Optional	Specify a value to determine the visibility of the ribbon item.  Valid values: "true" or "false"

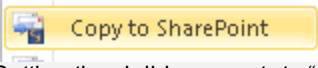
The table below describes the valid values of the tag property.


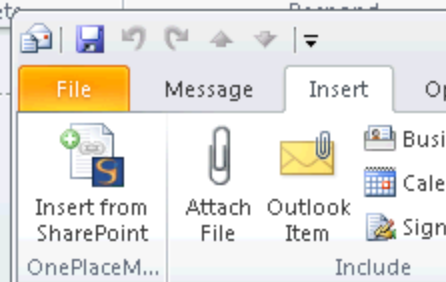
tag	Description
OPM_OutlookTab	 <p>This tag controls the entries OnePlaceMail tab in the main ribbon of Outlook 2010/2013</p> <p>Setting the visible property to "false" will hide the entire tab (including all buttons on the tab).</p> <p>Setting the label property will change tab displayname</p>

OPM_OutlookTabGroup	 <p>Setting the visible property to "false" will hide this entire group of buttons on the OnePlaceMail ribbon tab Setting the label property will change the group label</p>
OPM_Refresh	 <p>Setting the label property will change the name of the button. Setting the visible property of this button will not have any effect. The visibility of this button is determined by the presence of the configUpdateSettings element.</p>
OPM_ManageFolders	 <p>Setting the visible property to "false" will hide this button. Setting the label property will change the name of the button.</p>
OPM_Settings	 <p>Setting the visible property to "false" will hide this button. Setting the label property will change the name of the button.</p>
OPM_About	 <p>Setting the visible property to "false" will hide this button. Setting the label property will change the name of the button.</p>
Home_OnePlaceMailGroup	 <p>Setting the visible property to "false" will hide this entire group of button on the 'Home' tab of Outlook 2010/2013. Setting the label property will change the name of the group.</p>
Home_CopySharePointSplitButton Home_CopySharePointButton	 <p>This button consists of 2 elements:</p> <ol style="list-style-type: none"> <li>1. To set the visibility you must set <b>Home_CopySharePointSplitButton visible</b> property.</li> <li>2. To change the label you must set <b>Home_CopySharePointButton label</b> property.</li> </ol> <p>Please see the examples below this table.</p>

<p>Home_MoveSharePointSplitButton</p> <p>Home_MoveSharePointButton</p>	 <p>This ribbon button consists of 2 elements.</p> <p>To set the visibility you must set <b>Home_MoveSharePointSplitButton visible</b> Setting this property to "false" will hide this button on the 'Home' tab of Outlook 2010/2013.</p> <p>To change the label you must set <b>Home_MoveSharePointButton label</b> property will change the name of the button.</p> <p>Please see the examples below this table.</p>
	 <p>Please refer to the Section 4.3 for more details.</p>
<p>Home_OpenFromSharePoint</p>	 <p>Setting the visible property to "false" will hide this button on the 'Home' tab of Outlook 2010/2013. Setting the label property will change the name of the button.</p>
<p>Home_LaunchMenu</p>	 <p>Setting the visible property to "false" will hide this button on the 'Home' tab of Outlook 2010/2013. Setting the label property will change the name of the button.</p>
<p>MailRead_OnePlaceMailGroup</p>	 <p>Setting the visible property to "false" will hide this entire group of button on the 'Message' tab of Outlook 2010/2013 when <b>reading</b> an email. Setting the label property will change the name of the group.</p>



<p>MailRead_CopySharePointSplitButton</p> <p>MailRead_CopySharePointButton</p>	 <p>This button (in opened email message) consists of 2 elements.</p> <p>To set the visibility you must set <b>MailRead_CopySharePointSplitButton visible</b>. Setting this property to "false" will hide this button on the 'Message' tab of Outlook 2010/2013 when reading an email.</p> <p>To change the label you must set <b>MailRead_CopySharePointButton label</b>. This property will change the name of the button.</p> <p>Please see the examples below this table.</p>
OPM_RightClickCopySingle	 <p>Setting the visible property to "false" will hide this button in the right click menu in Outlook 2010/2013. This option is visible when selecting a single email and right clicking on it.</p> <p>Setting the label property will change the name of the button.</p>
OPM_RightClickCopyMultiple	 <p>Setting the visible property to "false" will hide this button in the right click menu in Outlook 2010/2013. This option is visible when selecting a multiple emails and right clicking on them.</p> <p>Setting the label property will change the name of the button.</p>
OPM_RightClickMoveSingle	 <p>Setting the visible property to "false" will hide this button in the right click menu in Outlook 2010/2013. This option is visible when selecting a single email and right clicking on it.</p> <p>Setting the label property will change the name of the button.</p>
OPM_RightClickMoveMultiple	 <p>Setting the visible property to "false" will hide this button in the right click menu in Outlook 2010/2013. This option is visible when selecting a multiple emails and right clicking on them.</p> <p>Setting the label property will change the name of the button.</p>
OPM_RightClickFolderManage	 <p>Setting the visible property to "false" will hide this button in the right click menu of a OnePlaceMail in Outlook 2010/2013. This option is visible when right clicking on a OnePlaceMail folder in the left hand side of Outlook 2010/2013. Setting the label property will change the name of the button.</p>
OPM_AttachmentsRightClickCopy	 <p>Setting the visible property to "false" will hide this button in the right click attachments menu of a mail item in Outlook 2010/2013. This option is visible when selecting attachments in an email and right clicking on them.</p> <p>Setting the label property will change the name of the button.</p>
OPM_InsertFromSharePoint	

	Setting the visible property to "false" will hide this button when composing email in Outlook 2010. Setting the label property will change the name of the button.
OPM_NewMailMessageGroup	 <p>This will hide the OnePlaceMail group and all contained item on the new Mail Message ribbon (on the Message tab)</p>
OPM_NewMailMessageInsertGroup	 <p>This will hide the OnePlaceMail group and all contained item on the new Mail Message ribbon (on the Insert tab)</p>

Example 1: Remove the entire **OnePlaceMail** ribbon tab from Outlook

[\(Click here to open .xml file\)](#)

Example 2: Rename OnePlaceMail tab buttons and rename the **Copy To SharePoint** toolbar button and the **Move To SharePoint** toolbar button.

[\(Click here to open .xml file\)](#)

Example 3: Updating the **OnePlaceMail** main ribbon tab

[\(Click here to open .xml file\)](#)

Example 4: Hide the **Move To SharePoint** and **Copy to SharePoint** toolbar buttons (limits user to only perform drag-drop transfer to My OnePlaceMail folders).

[\(Click here to open .xml file\)](#)

Example 5: Hide the **Send & File** toolbar button when composing email (same as Outlook 2007)

[\(Click here to open .xml file\)](#)

Example 6: Hide the **Insert from SharePoint** button when composing email

[\(Click here to open .xml file\)](#)

Example 7: Rename right click copy and move menu items

[\(Click here to open .xml file\)](#)

## 4.3 Customizing the Search SharePoint Ribbon Button



The Search SharePoint button (Outlook 2010/2013) in the ribbon can be hidden or renamed using the following config\_update.xml.

Example 1: Rename the Search SharePoint button to “Search Intranet”

[\(Click here to open .xml file\)](#)

Example 2: Hide the Search SharePoint button

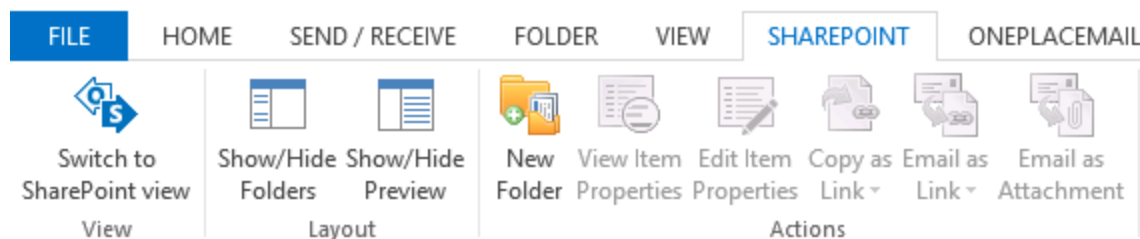
[\(Click here to open .xml file\)](#)

Example 3: Revert Search SharePoint button to default behaviour

[\(Click here to open .xml file\)](#)

## 4.4 Customizing the SharePoint Ribbon Tab

The SharePoint ribbon tab (Outlook 2010/2013) can be hidden or renamed using the following config\_update.xml.



Example 1: Rename the SharePoint tab to “Intranet”

[\(Click here to open .xml file\)](#)

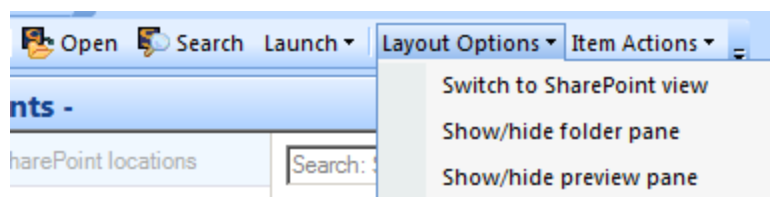
Example 2: Hide the SharePoint tab

[\(Click here to open .xml file\)](#)

Example 3: Hide the View group on the SharePoint tab

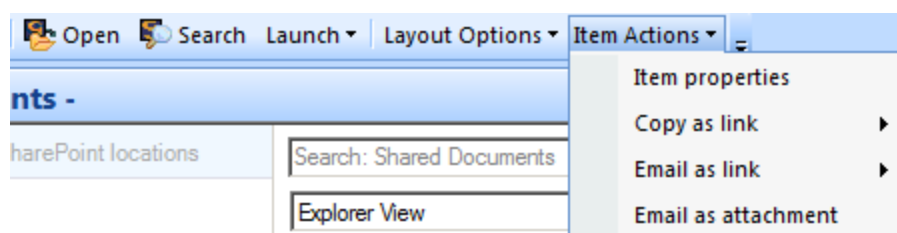
[\(Click here to open .xml file\)](#)

Similar customization can be performed in the Outlook 2007 user interface menus as shown below:



Example 1: Hide the Layout Options menu in Outlook 2007

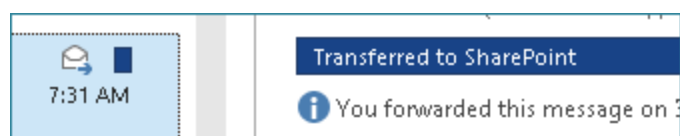
[\(Click here to open .xml file\)](#)



Example 2: Hide the Item Actions menu in Outlook 2007

[\(Click here to open .xml file\)](#)

## 4.5 Customize the Outlook Category when Email is Transferred to SharePoint



When email(s) are successfully copied to SharePoint a category of “Transferred to SharePoint” is automatically set on the email(s) in Outlook. You may change this to a custom category name by using the `<setCategoryOnTransfer>` tag.

The `<setCategoryOnTransfer>` tag must be inserted within opening and closing `<outlook>` tags.

The `setCategoryOnTransfer` tag properties are explained in the table below.

Property	Mandatory/Optional	Description
action	Mandatory	Set to “insert” to change the default behaviour Set to “delete” to revert to default behaviour
enabled	Optional	Valid values: “true” or “false”

categoryName	Optional	The name of the category to assign to transferred email messages.
--------------	----------	---

Example: Set the category name to “custom category name”

[\(Click here to open .xml file\)](#)

Example: Disable setting of category on transfer

[\(Click here to open .xml file\)](#)

## 4.6 OnePlaceMail Error Dialogs - Support Information

In the event of an error in the use of OnePlaceMail, the error dialog that is presented to the user can be customized to include support details of your company.

To enable these settings you must use a <OPMErrorDialogValues> tag. The <OPMErrorDialogValues> tag must be inserted between opening and closing <configuration> tags.

Below details the tag properties:

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
name	Mandatory	"Phone" for phone number "Email" for email address "Website" for website address "SupportLabelText" for main support header text on dialog "SupportDetails Text" for an instruction message
value	Mandatory	Value of each of the name options above

Example: Setting support information.

[\(Click here to open .xml file\)](#)

## 4.7 Custom Error Dialog Image

The error dialog image can be customized to have a company logo or any other image. The image will replace the image shown below:



The image must be called **OPMErrorDialogImage.jpg** and must be placed in the OnePlaceMail install directory (by default C:\Program Files\Scinaptic\Scinaptic OnePlaceMail). The image size must be **Width 302 pixels, Height 173 pixels**.

## 4.8 Item Properties - Checkbox Choice Column Rendering

When completing SharePoint item properties using OnePlaceMail, by default checkbox choice columns are rendered at a fixed height. If there are more choices than will fit within this height then scrollbars will appear. It is possible using the configuration option below to have checkbox choice column dynamically expand in height to fit all options.

To enable this behaviour you must use a `<choiceMultiColumn>` tag. The `<itemProperties>` tag must be inserted between opening and closing `<configuration>` tags.

Below details the tag properties:

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
fitHeightToItems	Mandatory	true or false (default)

Example: Make checkbox choice columns show all items instead of scrollbars

[\(Click here to open .xml file\)](#)

## 4.9 Save to SharePoint Dialog - Hiding the Location Content Tab

The Save to SharePoint dialog contains two tabs: Item Properties and Location Content. It is possible using the configuration option below to hide the Location Content tab so that it is not available to the user.

To enable this behaviour you must use a `<sharePointContentTab>` tag. The `<sharePointContentTab>` tag must be inserted between opening and closing `<sendToHandler>` tags.

Below details the tag properties:



Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
is Visible	Mandatory	True (default) or false

Example: Hide the Location Content tab from the Save to SharePoint dialog

[\(Click here to open .xml file\)](#)

## 5 Site Mailboxes

### 5.1 Configuring Site Mailbox Support

To setup your environment for SharePoint Site Mailboxes please follow this KB article:

*How do I setup my environment for SharePoint Site Mailboxes*

<http://www.scinaptic.com/support/0109.html>

By default, OnePlaceMail will detect any SharePoint Site Mailboxes that have been added to Outlook and provide additional features when working with Site Mailboxes.

The Site Mailbox behaviour can be configured through the configuration update process by using the <siteMailBoxSettings> tag.

The table below describes the properties that can be modified.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
useSiteMailBoxFeature	Mandatory	Set to "true" to enable Site Mailbox support (default), or "false" to disable Site Mailbox support
showCompatibilityWarning	Mandatory	Site Mailboxes are only supported in Exchange Cached mode, if you are working in a different mode (e.g. Exchange Online) you will receive a warning message on starting Outlook. To suppress this message set this property to "false", the default is "true"
enabled	Optional	This setting allows you to control if users have the ability to change this feature through the OnePlaceMail Settings.  Valid values: "true" or "false" (default is true)

Example: Disable OnePlaceMail support for Site Mailboxes

[\(Click here to open .xml file\)](#)

Example: Disable OnePlaceMail support for Site Mailboxes and prevent user from changing this setting

[\(Click here to open .xml file\)](#)

Example: Enable Site Mailbox support and disable CompatibilityWarning

[\(Click here to open .xml file\)](#)

## 5.2 Excluding Individual Site Mailboxes from Using OnePlaceMail Save Process

By default, when moving/copying email and/or attachments to a Site Mailbox document library, OnePlaceMail will replace the native process (prompting for relevant metadata and saving the item into SharePoint). If you want to exclude particular Site Mailboxes from using the OnePlaceMail process and rather continue using the native process you can define an inclusion or exclusion list of Site Mailboxes through the configuration update process.

The Site Mailbox behaviour can be configured through the configuration update process by using the `<siteMailboxDragDropAvailabilityList>` tag and child `<siteMailboxDragDropAvailabilityLocation>` tags.

The table below describes the properties that can be modified on the `<siteMailboxDragDropAvailabilityList>` tag.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
listType	Mandatory	Valid value: "exclusion" – All Site Mailboxes will use OnePlaceMail except for those identified in child <code>&lt;siteMailboxDragDropAvailabilityLocation&gt;</code> tags "inclusion" – All Site Mailboxes will use native behaviour except for those identified in child <code>&lt;siteMailboxDragDropAvailabilityLocation&gt;</code> tags

The table below describes the properties that can be modified on the `<siteMailboxDragDropAvailabilityLocation>` tags.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
type	Mandatory	Valid value: "site"
url	Mandatory	Full url of the Site Mailbox site including protocol. E.g. <a href="https://vs-server15:82">https://vs-server15:82</a> (the easiest way to check the exact url is to look at the OnePlaceMail config.xml file to find the Site Mailbox url for all site mailboxes that have been added to Outlook)

Example: Create an inclusion list so that only these 2 mailboxes will use the OnePlaceMail save process

[\(Click here to open .xml file\)](#)

Example: Create an exclusion list so that only these 2 mailboxes will not use the OnePlaceMail save process

[\(Click here to open .xml file\)](#)

Example: Delete any inclusion or exclusion lists

[\(Click here to open .xml file\)](#)

## 6 OnePlaceMail Productivity Tools for MS Office

### 6.1 Changing OnePlaceMail Productivity Tools for Office Button Labels and Visibility

All ribbon elements of the OnePlaceMail Productivity Tools for Office are configurable, allowing customisation of button visibility and labels. This is achieved using the Client Configuration Update Process (please refer to the chapter earlier in this document that details the Configuration Update Process). The remainder of this section details the necessary xml required to be placed in the config\_update.xml file to customise the ribbon.

Button labels and visibility are customised using the <ribbonObject> tag.

The <ribbonObject> tag must be inserted within a hierarchy of opening and closing <toolsForOffice><[OfficeApplicationName]><ribbonCustomisations> tags as shown below:

```
<toolsForOffice>
```

```
  <Word>
```

```
    <ribbonCustomisations>
```

```
      <ribbonObject /> tags go here
```

```
    </ribbonCustomisations>
```

```
  </Word>
```

```
  <Excel>
```

```
    <ribbonCustomisations>
```

```
      <ribbonObject /> tags go here
```

```
    </ribbonCustomisations>
```

```
  </Excel>
```

```
  <PowerPoint>
```

```
    <ribbonCustomisations>
```

```
      <ribbonObject /> tags go here
```

```
    </ribbonCustomisations>
```

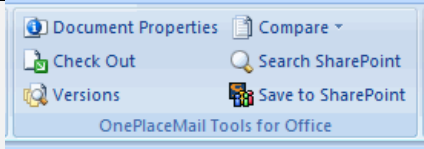
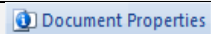
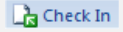
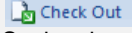
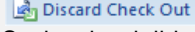
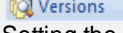
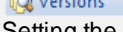
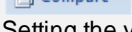
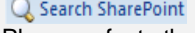
```
  </PowerPoint>
```

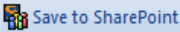

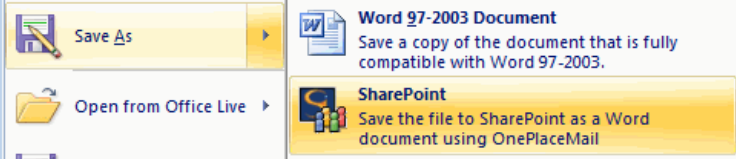
```
</toolsForOffice>
```

The ribbonObject tag properties are explained in the table below.

Property	Mandatory/Optional	Description
action	Mandatory	Set to "insert" to change the default behaviour Set to "delete" to revert to default behaviour
tag	Mandatory	This property identifies the ribbon item to customise (tab, tab group, button etc)
label	Optional	Specify a value for this property to give a ribbon item a custom label
visible	Optional	Specify a value to determine the visibility of the ribbon item.  Valid values: "true" or "false"

The table below describes the valid values of the tag property.

tag	Description
Home_OPMToolsForOfficeGroup	 <p>This tag controls the entries OnePlaceMail Tools for Office group.</p> <p>Setting the visible property to "false" will hide the entire group (including all buttons within the group).</p> <p>Setting the label property will change the label displayed at the bottom of the group box.</p>
Home_FileProperties	 <p>Setting the visible property to "false" will hide this button. Setting the label property will change the name of the button.</p>
Home_FileCheckIn	 <p>Setting the visible property to "false" will hide this button. Setting the label property will change the name of the button.</p>
Home_FileCheckOut	 <p>Setting the visible property to "false" will hide this button. Setting the label property will change the name of the button.</p>
Home_FileCheckOutDiscard	 <p>Setting the visible property to "false" will hide this button. Setting the label property will change the name of the button.</p>
Home_FileVersionHistory (Excel & PowerPoint only)	 <p>Setting the visible property to "false" will hide this button. Setting the label property will change the name of the button.</p>
Home_FileVersionHistoryWord (Word only)	 <p>Setting the visible property to "false" will hide this button. Setting the label property will change the name of the button.</p>
Home_ReviewCompareMenu (Word only)	 <p>Setting the visible property to "false" will hide this button. Setting the label property will change the name of the button.</p>
	 <p>Please refer to the Section 3.2.12 for more details.</p>

Home_SaveToSharePoint	 <p>Setting the visible property to "false" will hide this button. Setting the label property will change the name of the button.</p>
Home_OpenFromSharePoint	 <p>Setting the visible property to "false" will hide this button. Setting the label property will change the name of the button</p>
Office_OPMSaveToSharePoint	 <p>This tag controls the Save As &gt; SharePoint entry on the Office menu.</p> <p>Setting the visible property to "false" will hide this entry.</p> <p>Setting the label property will change the name of the entry.</p>

Example: Rename the "Document Properties" button to "Toggle Document Information Panel" in Excel.

[\(Click here to open .xml file\)](#)

Example: Hide the Save As > SharePoint option in Word, Excel, and PowerPoint.

[\(Click here to open .xml file\)](#)

## 7 Uninstallation

### 7.1 OnePlaceMail Outlook Add-in

#### OnePlaceMail software

Scinaptic OnePlaceMail and the pre-requisite for Office 2007 **Visual Studio 2010 Tools for Office Runtime** are registered in the Windows add/remove programs. To remove the programs, select the **remove** or **change/remove** button via add/remove program as shown in the screenshots below.



#### Removing OnePlaceMail client software

! **Note:** Only remove this software if it is not being used by any other client programs



#### Removing VSTO prerequisite client software

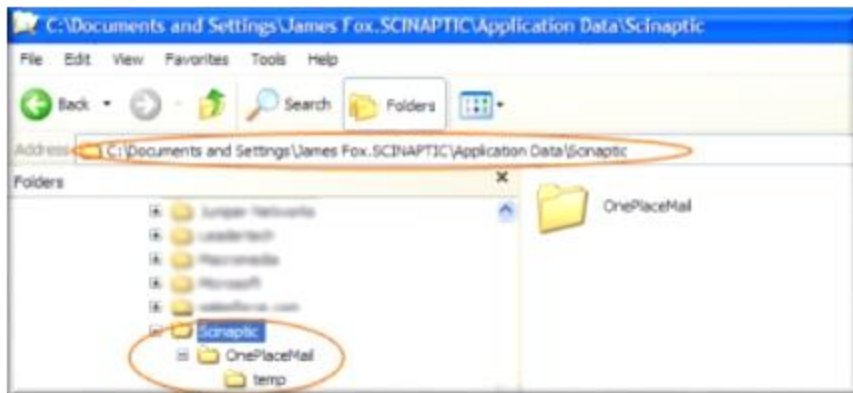
! **Note:** Office 2010/2013 pre-requisite Visual Studio Tools for Office 2010 Runtime is removed as above.

#### User configuration files

When removing the OnePlaceMail software, the user configuration files are retained. These are retained to enable seamless software upgrades without removing any user configurations. The user configuration files can be removed if you are no longer using Scinaptic OnePlaceMail software.

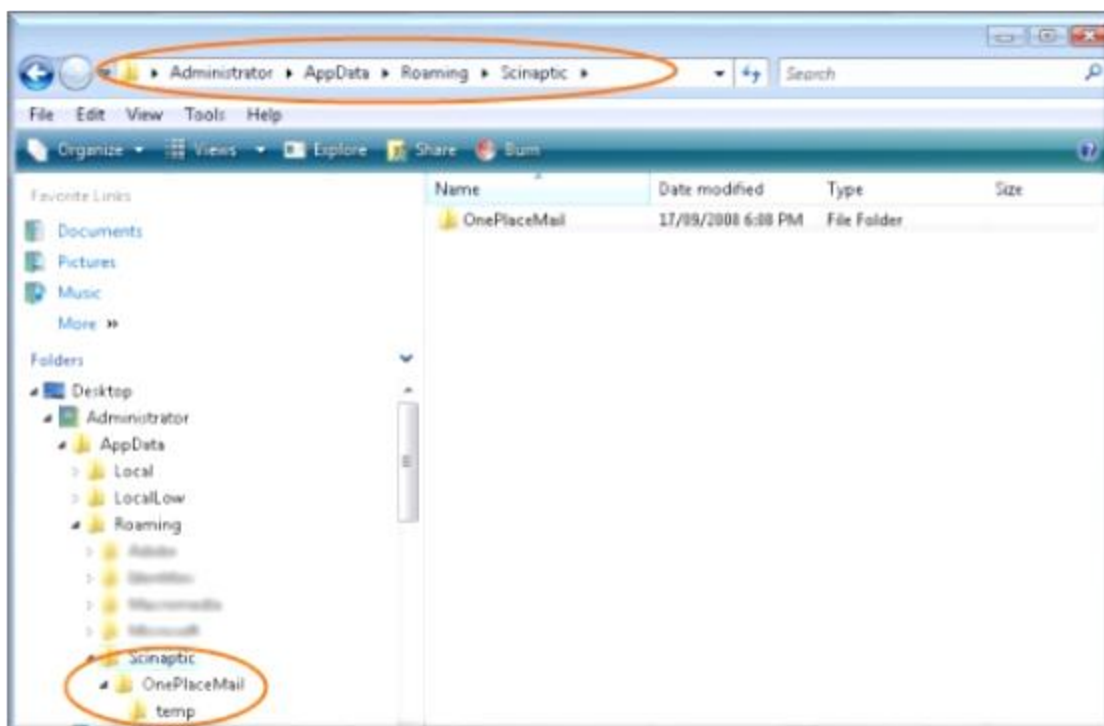
## Windows XP

Delete the **Scinaptic** folder and all sub folders/files as per the screenshot below. The Scinaptic folder is located under the **Documents & Settings\username\Application Data**



Windows Vista / Windows 7 / Windows 8

Delete the **Scinaptic** folder and all sub folders/files as per the screenshot below. The Scinaptic folder is located under the **Users\username\AppData\Roaming\Scinaptic**

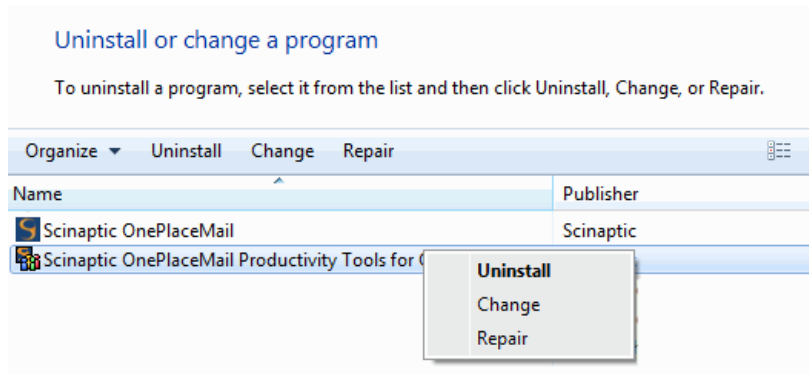




## 7.2 OnePlaceMail Productivity Tools for MS Office

To uninstall OnePlaceMail Tools for Office 2003/2007/2010/2013:

1. Open **Control Panel > Add/Remove Programs**
2. Select **Scinaptic OnePlaceMail Tools for Office (2007/2010/2013)**



3. Click **uninstall**