

OnePlaceMail Highlights | R6.3

Overview

Release 6.3

- Significant Performance Improvements
- Business Connectivity Service Support
- People & Groups Column Enhancements
- Launch Button from within Outlook
- Support for SharePoint 2013 Preview
- ... and much more

Release 6.2

- Insert from SharePoint (as links or attachments) in the email messages
- Open from SharePoint
- Override default content type for email messages
- Attach from file System using SharePoint Document ID
- Save attachments Right-click
- ...and much more

Release 6.1

- SharePoint Search Locations (within Outlook)
- Recent Locations Tracking
- Site Locations
- Managed Metadata / Enterprise Keywords / Taxonomy
- ...and much more

Scinaptic Communications Pty Ltd

Table of contents

Table of contents	2
OnePlaceMail Release 6.3	3
Release Focus	3
Performance	3
Business Connectivity Services	3
People & Groups Column	6
Launch Button	8
Other Enhancements	8
OnePlaceMail Release 6.2	9
Release Focus	9
Insert from SharePoint	9
Microsoft Outlook – Insert links or attachments	9
Open from SharePoint	12
Override default content type for email messages	13
Attach from file System and link with SharePoint Document ID	14
Save attachments – Right-click	14
Save, Insert and Open Content Enhancements	15
Copy to SharePoint from an opened email	16
Other updates	16
OnePlaceMail Release 6.1	17
Release Focus	17
SharePoint Search Locations (within Outlook)	17
Recent Locations Tracking	21
Site Locations	23
Managed Metadata / Enterprise Keywords / Taxonomy	26
Bug Fixes Highlights	28
Other Updates	29

OnePlaceMail Release 6.3

Release Focus

Release 6.3 delivers greater performance and tighter integration with business workflows and line of business systems.

A performance increase of up to 95% when saving emails and email attachments to SharePoint has been achieved. Line of business systems data is now surfaced directly within Microsoft Outlook, Office and File Explorer through superior support for SharePoint Business Connectivity Services. Significant enhancements have been made for SharePoint People/Groups columns and a new capability to launch actions and applications has been provided from within Microsoft Outlook.

Release 6.3 also provides support for SharePoint 2013 Preview environments and further capabilities will be announced in a subsequent R6.4 where both Office 2013 and more specific SharePoint 2013 capabilities will be unveiled.

Performance

Significant performance improvements have been delivered in Release 6.3 with the Save to SharePoint window being presented up to 95% faster. In instances where the save to SharePoint window has been suppressed, the total time for saving to SharePoint has also been reduced significantly.

Business Connectivity Services

OnePlaceMail simply works with your existing SharePoint 2010 Business Connectivity Services (BCS) configuration. There is no additional configuration necessary and performance and usability of your external Data Columns is simply amazing.

In summary, support for External Data columns (Business Connectivity Services):

- Allows email/files to be tagged with data from external systems
- o Provides full support for both the pop-up picker user interface and resolve actions
- Provides support for External Content Type filters
- o Delivers high performance over large datasets

Watch Video: This screencast shows '<u>How to use Business Connectivity Services from within Microsoft Outlook</u>' and demonstrates the new capabilities in action.

Resolve and select from External System

If a unique entry is provided, OnePlaceMail will identify and select the relevant entry from your External Data Column with no further action required. If multiple matches are identified, the user can further refine and select the appropriate entry.

Client	Fox			る	E)				
	Multiple mat	ches were found.	Show	options	<u></u>				
		B.4141	ala Mat	-					
		wutti	ple Mat	cnes					
OnePlaceMail - Save to SharePoint									
ocation Example Library (Home\Contos	<u>ə)</u>			G Choose Cl	ient				
- Ky OnePlaceMail -	Properties Locat	ion Content		Find First	Name	▼ Fox			٩
- SharePoint On-premise	Content Type	Project Document	•	Id	First Name	Last Name	State	Туре	Created
Calendar (Home \Contoso) E-contoso) E-contoso	✓ Use Email Subject/	Filename as Title value		Contains:	Contains:	Contains:	🔽 Contains:	♥ Contains:	V Contains:
Picture Library (Home\Contoso)	Title	[Auto Set]		1611	Fox	Ephram	VIC	Client	6/4/2012 12:00
i⊞-IIII Tasks (Home\Contoso) - - Recent -	Example Text *			25209	Fox	Semele Olav	WA ACT	Client	9/25/2009 12:0. 6/13/2009 12:0.
🖳 🎆 - SharePoint -	Example Choice	Category 1	•	66059	Fox	Buckels	WA	Client	1/27/2005 12:0.
-	Example Date	10/09/2012		87829	Fox	Donielle	NT	Lead	8/4/2002 12:00:
	Enterprise Keywords	< <type search="" to="">></type>							
	Client	Fox Multiple matches were found. Sh	ow options						
	Managed Metadata	< <type search="" to="">></type>	Q						
	Employee	< <type search="" to="">></type>	8, 10	Items 5					
	Task Lookup	< <type search="" to="">></type>	ų	-				OK	Cancel
	Customer Number								
Files RE Project Initiation Document (PID) - Review (with Budget).	msg (28.5 KB); Show more	Mana	ige Files					
Overwrite Existing Files?									

Resolve and select from external Items

Search your external system

OnePlaceMail provides the ability to search across all entries as configured in your External Data Columns / SharePoint BCS configuration.

In addition to searching with high performance, you can also sort and further filter search results to help locate and select the correct entry.

SomePlaceMail - Save to SharePoint				G Choose C	Client				
Location Example Library (Home\Contoso)				Find Las		+ fox			P
- My OnePlaceMail	Properties Locat	ion Content		Id	First Name	Last Name	e State	Туре	Created
Office 365 - SharePoint SharePoint On-premise Acme	Content Type	Project Document	•	Contains:	♥ Contains:	♥ Contains:	∇ Contains <mark>: n</mark>	V Contains:	♥ Contains: ♥
	👿 Use Email Subject/	Filename as Title value		44680	Karoly	Fox	NSW	Client	7/6/2007 12:00:
Example Library (Home\Contoso) Example Library (Home\Contoso)	Title	[Auto Set]		53294 77220	Risser Alexia	Fox Fox	NSW	Lead	7/13/2006 12:0 10/20/2003 12:
in tasks (Home∖Contoso) in tasks (Home∖Contoso)	Example Text *			79575	Charline	Fox	NT	Lead	7/14/2003 12:0
🛓 🦗 - SharePoint -	Example Choice	Category 1	•						
	Example Date	10/09/2012							
	Enterprise Keywords	< <type search="" to="">></type>							
	Client	< <type search="" to="">></type>		1					
	Managed Metadata	< <type search="" to="">></type>	¢;						
	Employee	< <type search="" to="">></type>	\$/ LL	Items 4				ОК	Cancel
	Task Lookup	< <type search="" to="">></type>	ų					<u> </u>	
	Customer Number								
Files RE Project Initiation Document (P	D) - Review (with Budget).	msg (28.5 KB); Show more	Manage	Files					
Overwrite Existing Files?									
Scinaptic OnePlaceMail®		(Save (ancel					

Search and Filter

People & Groups Column

Support for the SharePoint People / Groups column in Release 6.3 has been greatly enhanced. In addition to significantly improving usability, the new interface also improves performance selecting the relevant entries and saving to SharePoint

The People and Groups column provides support for both a pop-up 'picker' and a Resolve capability.

Picker Interface - supporting search and column sorting/filtering

The People/Group selection via the pop-up picker interface allows you to Search for the relevant person/s and groups and also allows for subsequent sorting and further filtering of your results.

G OnePlaceMail - Save to SharePoint								
Location Example Library (Home\Contoso)	!			Choose Emplo	yee			
- My OnePlaceMail -	Properties Locat	ion Content		tec				٩
SharePoint On-premise	Content Type	Project Document -	·	Display Name	Department	Title	Email	Account Name
Calendar (Home\Contoso) Example Library (Home\Contoso)	Use Email Subject/	Filename as Title value		Contains: 1	V Contains: V	Contains:	Contains: 5	Contains: 🔽
Example Ebility (Home Contoso) E- Tasks (Home Contoso)	Title	[Auto Set]		tech1			tech1@SCINAPTIC	SCINAPTIC\tech1
	Example Text *			tech10			tech10@SCINAPTIC	SCINAPTIC\tech10
😟 🦓 - SharePoint -	Example Choice	Category 1	•]	tech11 tech12			tech11@SCINAPTIC tech12@SCINAPTIC	
	Example Date	10/09/2012		tech13			tech13@SCINAPTIC	SCINAPTIC\tech13
	Enterprise Keywords	< <type search="" to="">></type>	7	tech14			tech14@SCINAPTIC	SCINAPTIC\tech14
	Client	< <tvpe search="" to="">></tvpe>	5					
	Managed Metadata	< <type search="" to="">></type>	2 2					
	Employee	× scinaptic\tech7		1				
	Linployee	< <tvpe search="" to="">></tvpe>	1 8/ 10/	Items 6				
	Task Lookup		Ū				ОК	Cancel
	Customer Number							
		(00.5.1/D)		ae Files				
Files RE Project Initiation Document (PI	 (with Budget) 	msg (28.5 KB); Show more	Manac	<u>ze riles</u>				
Scinaptic OnePlaceMail®			Save	Cancel				
			Cure	- direct				

Select People / Group – Search, Sort and Filter

Resolve functionality

Selecting a Person/Group can also be achieved by typing a name and selecting 'Resolve' or hitting enter. If the entry is unique, OnePlaceMail will resolve the entry to the correct Person/Group as appropriate.

ocation Example Library (Home\Contos	<u>o)</u>							— 0 — X	
- My OnePlaceMail - 	Properties Locat	ion Content		Choose Employe	Choose Employee				
Office 365 - SharePoint SharePoint On-premise Acme	Content Type	Project Document	•	tec Display Name	Department	Title	Email	Account Name	
e-III Calendar (Home∖Contoso) e-Ion Example Library (Home∖Contoso) e-Ion Picture Library (Home∖Contoso)	Use Email Subject/	Filename as Title value [Auto Set]		Contains: V		♥ Contains:	♥ Contains: ♥	Contains:	
i - III Tasks (Home∖Contoso) i Recent - i SharePoint -	Example Text *			scinaptic\tech2 scinaptic\tech7			tech2@SCINAPTIC tech7@SCINAPTIC	SCINAPTIC\tech2 SCINAPTIC\tech7	
	Example Choice	Category 1	•	tech1 tech10			tech1@SCINAPTIC tech10@SCINAPTIC	SCINAPTIC\tech1 SCINAPTIC\tech1	
	Enterprise Keywords	< <type search="" to="">></type>		tech11 tech12			tech11@SCINAPTIC tech12@SCINAPTIC	SCINAPTIC\tech1	
	Client	< <type search="" to="">></type>		tech13 tech14			tech13@SCINAPTIC tech14@SCINAPTIC	SCINAPTIC\tech1	
	Managed Metadata Employee	< <type search="" to="">> x scinaptic\tech7</type>	2	tech3 tech4			tech3@SCINAPTIC tech4@SCINAPTIC	SCINAPTIC\tech3	
		tec Multiple matches were found. <u>Sh</u>	8, 111 ow options	Items 10					
	Task Lookup	< <type search="" to="">></type>					ОК	Cancel	
	Customer Number			-					
es <u>RE Project Initiation Document (</u> Overwrite Existing Files?	PID) - Review (with Budget).	msq (28.5 KB); Show more	Manag	<u>e Files</u>					
inaptic OnePlaceMail®			Save	Cancel					

Resolve People / Group Entry

Launch Button

The new Launch capability expands on positive feedback around OnePlaceMail support for defining multiple SharePoint Search locations/scopes from within Outlook.

The configurable Launch ribbon menu allows for shortcuts to web pages, files and applications to provide quick access for users to access and perform actions directly from Microsoft Outlook

File Hor	ne Send / Receive	Folder	View OnePlaceMail				
New New E-mail Items *	Glean Up + Delete	Reply	Reply Forward More *	Copy to Move To SharePoint * SharePoint *	*	Search 🔻 🎦 Move to: ? Open 🔂 Team E-mail Launch 💙 🚑 Reply & Deli	•
New	Delete		Respond	OnePlaceMa		SharePoint Conference La	s Vegas
Favorites Inbox			iearch Inbox (Ctrl+E)			FY 2013 Budget Calculator	s Size 🕅
🔄 Sent Ite 🗟 Deleted	ms (1) Items (8)		🚔 Thu 21/07/2011		RE Te	Leave Request New Purchase Order	s Size 🌾 7 KB 🌾 20 🌾
Demonstration Index	onUser1@SCINAPTIC		📄 🛛 Wed 17/02/2010	Demonstration User 2 F		ample Email oject Initiation Document (PI.	

Launch applications, files and start actions

Other Enhancements

OnePlaceMail Release 6.3 includes a number of other enhancements and bug fixes. Some of these are listed below and a detailed list is provided in the Release Notes:

Other enhancements

- Added support for SharePoint 2013 Customer Preview
- Check for updates to validate your OnePlaceMail installation is the latest available
- Enhanced browsing experience from within Outlook (now support page navigation controls and ability to open the current page in a full browser)
- "Email as Attachment" context action now available in custom library definitions
- Column mapping can now be achieved to columns that are not shown in Create/Edit forms

Release Notes

http://www.scinaptic.com/support/oneplacemail-release-notes.html

OnePlaceMail Release 6.2

Release Focus

Release 6.2 is focused on greater productivity by bringing SharePoint to the user.

Seamless access to SharePoint content is provided by the new 'Insert from SharePoint' and 'Open from SharePoint' capability. Taking advantage of key SharePoint platform capabilities such as the Document ID feature, OnePlaceMail is making it easier to be productive and share content in a more effective manner.

Insert from SharePoint

Microsoft Outlook - Insert links or attachments

OnePlaceMail R6.2 provides the ability to insert links or attachments from Microsoft SharePoint when writing an email message.

Benefit: Minimise duplicate documents, reduce excessive storage in Microsoft Exchange or network traffic from emails with attachments.

nd Inse File Shar	rePoint 🚪 👻 🚽 💆 🗖	E ≣ ∰ ∰ Address Check Att	ach Attach Signature	Low Importance	Zoom Zoom
	To Demoestration User 1 Cc ubject: RE: Project A0001 - Specification OnePlaceMail - Insert from SharePoint				x
s discu	Location <u>63</u> 01. Contracts	Sea	rch: 01. Contracts		2
	- My OnePlaceMail -	Name	Modified By	Modified Type	Size
egards	🖃 💼 > Contoso	Contains:	V Contains: V	C V	7
mes		PID.doc	Admin	24/02/2012 doc	48.5 KB
rom: [Example Document Library (Contoso)	Project Specification.docx	Admin	25/02/2012 docx	20.2 KB
ent: T	Project 001	Test Email Message_1r0lhckr.msg	Admin	25/02/2012 msg	332.5 KB
: Den	······································	RE_ Project Initiation Document _PID Re	-	25/02/2012 msg	61 KB
ubject	····ia 03. Plans ····ia 04. Financials	OnePlaceMail Administrator Guide.pdf		29/06/2012 pdf	1.99 MB
,	Project 002	Example Email_1r18sokj.msg	James Fox	29/06/2012 msg	51.5 KB
		RE_ Project Initiation Document _PID Re		29/06/2012 msg	55.5 KB
nePlac mple c	⊕-⊡ Example Email Library (Contoso) ⊕-⊡ Minimal View (Contoso)	RE_ Project Initiation Document _PID Re	-	29/06/2012 msg	61.5 KB
inpic c	Picture Library (Contoso)	RE_ Project Initiation Document _PID Re		29/06/2012 msg	53.5 KB
nd Re	ie⊶ 1000 Tasks (Contoso) > Office 365 - SharePoint	Upcoming project_1r0lhd9c.msg	James Fox	29/06/2012 msg	78.5 KB
emons	ba-bar > On-premise SharePoint ga-coo - Recent - ga-coo - SharePoint -	Research Project.xls	James Fox	29/06/2012 xls	38.5 KB
		3 items selected			
			Insert as Link	as Attachment	ancel

Insert from SharePoint (As links or attachments)

Browse

Recent and My OnePlaceMail locations (favorites) are available for efficient access to important SharePoint libraries and lists. You can also browse for other SharePoint locations (Security Trimmed) using the SharePoint hierarchy tree

Search SharePoint

SharePoint search capabilities are provided from within the Insert from SharePoint window. Therefore, allowing you to search both SharePoint metadata and file content. OnePlaceMail provides hit highlighting on the Search results.

OnePlaceMail - Insert from SharePoint			
Location 01. Contracts	proj	ject	×
- 🕞 - My OnePlaceMail -	Found 14 search results.		
⊨ initial > Contoso	Name	Modified By	Modified Size 📤
ACME Projects	Contains:	🛛 Contains: 🖓	
Contoso) Contracts	Workshop_1r0lhcr5.msg Manly[ae0172bd-7b41-4820-9775-2e0169 Project Requirements Workshop.EML	6ce8f4 2009-03-23T09:32:05Z	. 2012-02-25T08:50:50Z
···· <u>·</u> 02. Correspondence ··· <u>·</u> 03. Plans ···· <u>·</u> 04. Financials ⊕·· <u>·</u> Project 002 ⊕·· <u>·</u> Project 003	RE: Project Initiation Document (PID) - Rev https://oneplacemail.sharepoint.com/site: Contracts/RE_Project Initiation Document Manlylae0172bd-7b41-4820-9775-2e0169 Please review the following Project Initiati	s/Contoso/ExampleDocument Libr :_PID Review_1r159mnp.msg :6ce8f4 2009-09-30T14:52:11Z	. 2012-06-29T14:24:54Z
Example Email Library (Contoso)	🔁 Project A0001 - Specification	Julia	29/06/2012 9: 1.99 MB
	https://oneplacemail.sharepoint.com/site: Contracts/OnePlaceMailAdministratorGui Green Sea Turtle.jpg;OnePlaceMailAdmini Level 2, 27 Belgrave Street PO Box 12, I	de.pdf istratorGuide.pdf; Project Specific	ation.docx Suite 2,
ia - <mark>io</mark> o - Recent - ⊯- iiii - SharePoint -	RE: Project Initiation Document (PID) - Rev https://oneplacemail.sharepoint.com/site: Document PID Review 1r19v0s4.msg 2 items selected		26/02/2012 4: 59 KB ary/RE_ Project Initiation
		Insert as Link	Attachment Cancel

Full SharePoint Search with hit highlighting

Document ID Support

If the SharePoint 2010 Document ID feature has been enabled, OnePlaceMail will use this to form the underlying URL of the inserted links. Therefore, if the documents are moved within your SharePoint environment, the links will continue to work.

👔 🖪 🤊 😈 🔺 🔻 🖙	RE: Project A0001 - Specification - Message (HTML)	- 0 X
File Message Insert	Options Format Text Review	۵ 🕜
Send Insert from and File SharePoint OnePlaceMail	B 2 C V Low Importance	Zoom Zoom
To Demonstration Send Cc Subject: RE: Project Ar	1 <u>User 1</u> D001 - Specification	
Hi John, As discussed, please find link <u>Project Specification.docx</u> <u>OnePlaceMail Administrator</u> <u>Example Email 1r18sokj.msg</u> Regards, James	Ctrl+Click to follow link Guide.pdf	128

Links using the SharePoint Document ID Feature in SharePoint 2010 (if enabled)

Support for Libraries and lists

OnePlaceMail supports linking to items within a SharePoint Library (Document or Picture Library) or a SharePoint List (e.g. Event, Task, Issue, Custom list, etc...)

Insert as links to file

Insert links directly to one or more files within SharePoint (e.g. Word documents, Excel Spreadsheets, etc...).

Insert as links to Document Properties

Insert Links to an Item Properties (view/display) for items within a SharePoint document library or list.

cation 01. Contracts	Search: 01. Contra	cts			2
- My OnePlaceMail - - Archived Projects - Archived Project 001 - Project 001 - Project 001 - 01. Contracts - 02. Correspondence - 03. Plans - 04. Financials - Project 002 - Project 003 - Example Email Library (Contoso) - 101	PID.doc Project Specification.docx Test Email Message_1r0lhckr.msg RE_ Project Initiation Document _PID Review_1r1el9hs. OnePlaceMail Administrator Guide.pdf Example Email_1r18sokj.msg RE_ Project Initiation Document _PID Review _1r159m. RE_ Project Initiation Document _PID Review_1r159mt. RE_ Project Initiation Document _PID Review_1r159m. Upcoming project_1r0lhd9c.msg Research Project.xls	Admin Admin Admin Admin Admin James Fox James Fox James Fox	Modified 24/02/2012 25/02/2012 25/02/2012 25/02/2012 29/06/2012 29/06/2012 29/06/2012 29/06/2012 29/06/2012	C ♥ doc docx msg msg pdf msg msg msg msg msg	Size 48.5 KE 20.2 KE 332.5 I 61 KB 51.5 KE 53.5 KE 53.5 KE 38.5 KE
	ms selected Insert as Link to docume		as Attachment	Ca	ncel

Insert Links to the document or the display Properties of the library/list Item

Insert as attachment

When sending files to external recipients, OnePlaceMail provides the ability to insert file attachments. The Insert file attachments button is provided in the Enterprise edition of OnePlaceMail.

> Archived Projects Contains: Conta	ocation 01. Contracts	Search: 01. Contract	cts			2
Image: SharePoint Image: SharePoint Image: SharePoint Image: SharePoint Image: SharePoint Image: SharePoint	 > Contoso ACME Projects Announcements (Contoso) Stample Document Library (Contoso) Project 001 O1. Contracts O2. Correspondence O3. Plans Project 002 Project 003 Example Email Library (Contoso) Starbe Example Email Library (Contoso) Spectrure Library (Contoso) Spectrure Library (Contoso) Spectrure Library (Contoso) Spectrure Library (Contoso) Tasks (Contoso) 	Contains: Contai	Contains: Admin Admin Admin Admin James Fox James Fox James Fox James Fox James Fox James Fox	24/02/2012 25/02/2012 25/02/2012 25/02/2012 29/06/2012 29/06/2012 29/06/2012 29/06/2012 29/06/2012 29/06/2012	C ♥ doc docx msg msg pdf msg msg msg msg msg	48.5 Kl 20.2 Kl 332.5 l 61 KB 1.99 M 51.5 Kl 61.5 Kl 53.5 Kl 78.5 Kl
					-	

Insert as Attachments

Open from SharePoint

Open a document from SharePoint when working in Microsoft Outlook, Word, Excel or PowerPoint. The 'Open from SharePoint' provides all the rich browse and search functions available on the Insert from SharePoint.

OnePlaceMail - Open from SharePoint						X
Location 01. Contracts (oneplacemail.sharepoint	nt.co	m\sites\Contoso\Example Docu Search: 01. Contra	cts (oneplacema	ail.sharepoint.co	m\sites\	Cv
- My OnePlaceMail -		Name	Modified By	Modified	Туре	Size
		Contains: 5	Contains: 😽	,	C V	,
	P	PID.doc	Admin	24/02/2012	doc	48.5 KB
	(W)	Project Specification.docx	Admin	25/02/2012	docx	20.2 KB
01. Contracts (oneplacemail.sharepoint.com\site		Test Email Message_1r0lhckr.msg	Admin	25/02/2012	msg	332.5 K
Picture Library (Contoso) Example Email Library (Contoso)		RE_ Project Initiation Document _PID Review_1r1el9hs	Admin	25/02/2012	msg	61 KB
	1	OnePlaceMail Administrator Guide.pdf	James Fox	29/06/2012	pdf	1.99 M
		Example Email_1r18sokj.msg	James Fox	29/06/2012	msg	51.5 KB
		RE_ Project Initiation Document _PID Review1r159	James Fox	29/06/2012	msg	55.5 KB
		RE_ Project Initiation Document _PID Review_1r159mt	James Fox	29/06/2012	msg	61.5 KB
		RE_ Project Initiation Document _PID Review_1r159m.	. James Fox	29/06/2012	msg	53.5 KB
		Upcoming project_1r0lhd9c.msg	James Fox	29/06/2012	msg	78.5 KB
	3	Research Project.xls	James Fox	29/06/2012	xls	38.5 KB
4	1 it	em selected				
		Open in Applicat	ion Open	in Browser	Ca	ancel

Open Documents from SharePoint in Application or Browser

Override default content type for email messages

OnePlaceMail provides the ability to select from one or more SharePoint Content Types available within a library, list, folder or document set when completing metadata. The default content type is based on the SharePoint configuration for the selected SharePoint location.

OnePlaceMail Release 6.2 allows you to optionally override the default SharePoint Content Types when saving email messages (.msg files). Therefore, streamlining the process of selecting an appropriate Content Type based on the type of information being saved to SharePoint.

Benefit: Improved usability and streamlined process when saving to SharePoint

G OnePlaceMail - Settings
SharePoint Connections Outlook Save To SharePoint SharePoint Credentials Proxy Licensing
General*
Prompt to 'Save to SharePoint' when adding attachments to an email
Prompt to 'Save to SharePoint' when sending an email
☑ Add category to items after saving to SharePoint
Category Name: Transferred to SharePoint
Show welcome screen at startup
☑ Use Document Ids when creating links
Data Location (Advanced)*
What is the difference between the Data File locations?
OnePlaceMail Data File - Local user profile (Recommended)
OnePlaceMail Data File - Roaming user profile
Default Data File
Logging (Advanced)*
Enable application logging (support)
Email Content Type
Select email content type by default for emails
Content Type Name: OnePlaceMail Email
* Please restart Outlook for these changes to take effect.
OK Cancel

Streamline saving emails or other document types to SharePoint (Smart filing)

Attach from file System and link with SharePoint Document ID

When attaching files from the file System to an email message, OnePlaceMail will request if the file should be added to SharePoint and replaced with a link to the newly saved item in SharePoint. If the SharePoint Document ID feature has been enabled, OnePlaceMail will insert the link into the email using the Document ID.

Save attachments - Right-click

When reading an open email message, you can right-click and save the attachments to SharePoint. This is in addition to the existing Drag & Drop capability provided by OnePlaceMail.

🖂 🚽 🧐 🤨 🔺 🕨 Attachment Tools	Email w	ith 3 attachments - Message (HTML)		
File Message Attachments				۵ 🕜
Open Quick Save Save All Remove Print As Attachments Attachment	Select Copy Sho All Messa			
Actions	Selection Messa	-		
File name: Project Initiation Document.doc Size: 27 KB Author: tech3 Last changed: Monday, 23 March 2009				
🖂 Message 🖳 Project Initiation Document.do			lies.jpg (86 KB)	
		<u>O</u> pen		
	ê	Quick Print		
	2 2	Save As		
	×	Save All Attachme <u>n</u> ts Remo <u>v</u> e Attachment		
	E)	<u>C</u> opy		
		Select A <u>I</u> I		
		Copy Attachment(s) to SharePoint		
				-
				*
				*
See more about: tech3.				22 ^

Right-Click Copy Attachments to SharePoint

Save, Insert and Open Content Enhancements

The Location Content Tab on the Save to SharePoint, and files view of the Insert from SharePoint and Open from SharePoint has been enhanced to include the following generic capabilities:

Filtering / Sorting

Advanced filtering and sorting capabilities when browsing or searching are provided to help locate relevant items.

S OnePlaceMail - Insert from SharePoint					×
Location 01. Contracts (oneplacemail.sharepoint	t.com\sites\Contoso\Example Docu Search: 01. Contra	cts (oneplacema	il.sharepoint.co	m\sites\(~
🖃 🔂 - My OnePlaceMail -	Name	Modified By	Modified	Туре	Size
	Contains: project	Contains: 😽		C	\supset
	Project Specification.docx	Admin	25/02/2012	docx	20.2 KB
E-ion - Recent -	RE_ Project Initiation Document _PID Review_1r1el9hs.	Admin	25/02/2012	msg	61 KB
01. Contracts (oneplacemail.sharepoint.com\site	RE_ Project Initiation Document _PID Review1r159	James Fox	29/06/2012	msg	55.5 KB
Picture Library (Contoso) Sample Email Library (Contoso)	RE_ Project Initiation Document _PID Review_1r159mt.	James Fox	29/06/2012	msg	61.5 KB
	RE_ Project Initiation Document _PID Review_1r159m	James Fox	29/06/2012	msg	53.5 KB
	Upcoming project_1r0lhd9c.msg	James Fox	29/06/2012	msg	78.5 KB
	Research Project.xls	James Fox	29/06/2012	xls	38.5 KB
	Items 7				
			Aurober	C -	
	Insert as Link	Insert a	s Attachment	La	ncel

Filter or Sort Content

Opening properties

Right-Click on a file to open a browser window to the properties display form in SharePoint.

G OnePlaceMail - Insert from SharePoint								
Location 3 01. Contracts (oneplacemail.sharepoint.com/sites/Contoso/Example Docu Search: 01. Contracts (oneplacemail.sharepoint.com/sites/Co								
	Name Contains: project Project Specification.docx RE_ Project Initiation Document _PID Review _1r159 RE_ Project Initiation Document _PID Review _1r159mt RE_ Project Initiation Document _PID Review_1r159mt Research Project_1r0lhd9cmsg Research Project_xls	James Fox James Fox		msg 61 KB msg 55.5 KB msg 61.5 KB msg 53.5 KB msg 78.5 KB				
۰	1 item selected							
	Insert as Link	Insert a	as Attachment	Cancel				

View Item Properties in browser

Copy to SharePoint from an opened email

The ability to copy an opened email message to SharePoint has been provided. This is in addition to the existing methods for saving emails to SharePoint: Drag & Drop, 'Copy To'/ 'Move To' buttons or Right-Click actions.

As with other Copy functions provided by OnePlaceMail, the Copy to SharePoint button can be disabled/removed if moving content is preferred.

🖂 🚽 👘 🏕 🗇 🗧 Project A0001 - Specification - Message (HTML)	
File Message	8
Copy to SharePoint * Copy to SharePoint * <td< td=""><td></td></td<>	
Recent	_
Picture Library (Contoso)	м
Example Email Library (Contoso)	
01. Contracts (oneplacemail.sharepoint.com\sites\Contoso\Example Document Library\Project 001)	
Select SharePoint location (2 MP)	
Project Specification.docx (13 KB)	
OnePlaceMail provides seamless Microsoft Outlook to SharePoint connectivity. Emails and/or attachments can be placed into SharePoint by a simple drag/drop. All email attributes are automatically captured. Kind Regards, Demonstration User 1	
See more about: Demonstration User 1.	^

Other updates

Release 6.2 includes a number of other enhancements and bug fixes as detailed in the Release notes.

Release Notes http://www.scinaptic.com/support/oneplacemail-release-notes.html

OnePlaceMail Release 6.1

Release Focus

Release 6.1 is focused on making it easy find and access content within SharePoint from desktop applications.

- The power of SharePoint/FAST Search, including any customisations is made available from your desktop applications such as Microsoft Outlook.
- Accessing and saving to recent locations is made is possible with the new Recent Locations on the left navigation of Outlook and Save to SharePoint window.

SharePoint Search Locations (within Outlook)

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

OnePlaceMail R6.1 provides the ability to define one or more search locations/scopes and therefore allows the user to locate content within the SharePoint platform in an efficient manner.

The Search locations can be deployed to one or more users centrally or a user can configure the search locations from the OnePlaceMail Settings. The Search locations are available in Microsoft Outlook, Office Word, Excel and PowerPoint (Office 2007 and 2010).

ePoint C	Connections Outlook Save To SharePoint SharePoint Credentials	Proxy Licensing
How do	o I configure search locations?	
SharePoi	int Search Locations	
Title	SharePoint (Advanced)	Remove
URL	https://oneplacemail.sharepoint.com/search/Pages/advanced.aspx	
Title	Project Sites	Remove
URL	https://oneplacemail.sharepoint.com/search/Pages/projects.aspx	
Title	Matter Management System	Remove
URL	https://oneplacemail.sharepoint.com/search/Pages/matterslaspx	
Title	People Search	Remove
URL	https://oneplacemail.sharepoint.com/search/Pages/peopleresults.aspx	
🕂 🕂	Id location	
		OK Ca

Define one or more Search Locations/scopes

Inbox - DemonstrationUser1@SCINAPTIC - Microsoft Outlook 0 📑 🤊 🖃 - 0 % Home Send / Receive OnePlaceMail ۵ 🕜 Folder View X 🐴 Move 🔻 Find a Contact 👻 ۵, 🙈 Reply 5 A Move to: ? ₿. ۴ **ب** _____ S Ś Reply All 🙈 To Manager 🖄 Rules 🔻 🔟 Address Book & Delete Move To Tags New New Copy to Search 🔂 Team E-mail Ŧ 🔊 OneNote 🍸 Filter E-mail 🔻 E-mail Items * SharePoint * SharePoint SharePoint * New Delete Respond OnePlaceM Move Find SharePoint (Advanced) Favorites < Project Sites Search Inbox (Ctrl+E) Q < Matter Management System ≜ 🔺 Arrange By: Date DemonstrationUser1@SCINAPTIC Oldest on top People Search 😽 7 🖂 Inbox 📄 Demonstration User 2 Matter Management System RE: Test Email Message 👰 Drafts 📄 Demonstration User 2 Sent Items (1) https://oneplacemail.sharepoint.com/search/Pages/matters.aspx RE: Project Initiation Do Deleted Items (8) 🎲 OnePlaceMail 📄 Demonstration User 2 🧓 Junk E-mail Press F1 for add-in help. RE: Project Initiation Document (PID) - Review 🗟 Outbox Ē _ . _ . _

The defined Search Locations are available directly from Microsoft Outlook or other Office applications.

Search Locations from within Microsoft Outlook



Search Locations from within Microsoft Word (Excel and PowerPoint)

(김 이 I=		Microsoft Ou	tiook.						5
Tile Home Send / Receive Folder	View OnePlaceMail				_				-
lew New mail Itens - New Detete	Reply Forward Bg More -	Copy to Move To SharePoint - SharePoint - S	Search harePoint -	Move to: 1 By To Manager Team E-mail		hlavz = Rules = Coneliate Mave	Categorize - Follow Up - Tags	Find a Contact +	6
Favorites			Project S	Int (Advanced)		india.			1
DemonstrationUserL@SCINAPDC	Search + Advar	nced Search	1000	fanagement System			0 7 0	Admin +	- El rea chomode fermione est
Deleted Items (2) Junik E-mail Outbox	Find documents								and the fact
ASS Feeds C Search Folders	The exact phrase: Any of these words:								
- OnePlaceMail -	None of these words:								
Deleted Rems	Only the language(s):	C English							
- My OnePlaceMail - - Archived Projects - Archived Projects - Contoso ACME Projects - Contoso - Contoso - Manimal View (Contoso) - Picture Ubrary (Contoso) - Taks - Current Projects - Current Projects - Office 305 - SharePoint									and a second
On-premise SharePoint On-Premise Sh		(Pick Property) 💌 Car	itains	•			And	•	
🗭 Search Folders 👻								Search	-
🖸 🖬 🖬 🗿 🖬 🖉 - 🗌	Done								
				This folder v	was last s	pdated on 4.6	8/2011. 100% (e). 0	

The rich SharePoint Search capabilities are available within Microsoft Outlook.

The selected Search Location is presented for the user to perform a search

The Search Results are display with the full capabilities provided by SharePoint Search, Fast or other implemented search technology.

이 급 이 I ································	View OnePlaceMail	Microsoft	Outlook		- R 1
New Delete	🗐 🚉 🕮 Meeting	Copy to More To Search SharePoint - SharePoint - ConsPaceMal	Din Mine to 7 Bi, Ta Mana Team E-mail ✓ Dane Frank & Dane Provide Steps	Mare Buter Conel	Unresd Read Find a Contact +
> Favorites 4	Search + Search	Deculter			a 🕞 a Admin . 🔺
Demonstration/Direct@SCINAPTIC Demonstration/Direct@SCINAPTIC Drafts South Ress (1) Defined Ress (2)	Jearch - Search	Al Sites People ALL(OnePlaceMail)	م	Preferences Advanced	
Ann E-mail Outbos Outbos South of the server	Result Type Any Rasult Type Weboope Email Word Site Any Site Any Site Any Site Any Athen James Fox Chin Wood Julia Admin show more ~ Modified Date Any Modified Date	above, You cari icks on Shat Dote: 1/24/2012 Size: 103 https://www.plac.email.shar 20 https://wwww.plac.email.shar 20 https://wwwwwwwwwwwwwwwwwwwwwwwwwwwwwwwwwww	Inis welcome text or add new lists t med Documents to add files or on i ND export.com/sites/ongliscemaildev 	the calendar to create s Top Link Bar Quick Launch r Taska Discussions Team /default.aspx .c.microsoftanine.com/Shared to this page by clicking the edit bu the calendar to create	Admin Vew mare ptople +
	1	Defet 2/15/2012			

The search results

Recent Locations Tracking

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



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



Drag / Drop to Recent Locations

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



Select a Recent Location folder to access SharePoint

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

G OnePlaceMail - Save to SharePoint			- • •
Location Example Document Library (Contoso)			
☐ - Can by OnePlaceMail - ☐ > Archived Projects 0 → Contoso	Properties Loca	tion Content	
E - Durrent Projects	Content Type	Project Document	•
	☑ Use Email Subject/	'Filename as Title value	
- Recent - 	Title	[Auto Set]	
Example Email Library (Contoso)	Enterprise Keywords	<-type to search>>	
HTM - SharePoint -	ontoso/Example Documen	t Library	•
	Required Text *		
	Example Date	21/02/2012	
	Region	× Manly	
		< <type search="" to="">></type>	- Ç
	Example Lookup	< <type search="" to="">></type>	
< •			
Files RE Project Initiation Document PID Rev	riew 1r159mt0.msg (33 KE	3); Show more	Manage Files
Overwrite Existing Files?			
Scinaptic OnePlaceMail®		Save	Cancel

Save to a Recent Location

Site Locations

OnePlaceMail provides the ability for a user to simplify their view of SharePoint by conveniently selecting one or more SharePoint locations (Libraries, Lists, Folders and Document Sets) and adding these locations into a 'virtual' structure on the left navigation of Outlook.

The favourite SharePoint locations are available in Outlook and also the Save to SharePoint Window when saving content from File Explorer or other Office applications.

OnePlaceMail Release 6.1 has extended this capability to allow the user to add SharePoint Sites into the virtual SharePoint Structure. Therefore, allow the user to drag & drop content into SharePoint Sites or access the SharePoint Sites from within Outlook.



The SharePoint Sites appear on the left navigation of Outlook



Drag & drop emails or attachment to a SharePoint site.

The Save to SharePoint window appears with the Libraries and Lists of the Sites. OnePlaceMail provides the option to filter the Sites to remove Lists, libraries or Sub Sites.



© Copyright 2012 Scinaptic Communications Pty Ltd

SharePoint Sites can be conveniently accessed from within Outlook.



Access a SharePoint Site from within Outlook

Managed Metadata / Enterprise Keywords / Taxonomy

The Save to SharePoint window allows for content to be classified according the metadata/columns defined with your SharePoint environment. This includes support for the full type-ahead capabilities of the Enterprise Keywords and Managed Metadata.

G OnePlaceMail - Save to SharePoint								
Location Example Document Library (Contoso)								
My OnePlaceMail	Properties Loca	tion Content						
ACME Projects Evample Document Library (Contoso)	Content Type	Project Document						
⊕ 📴 Example Email Library (Contoso)	✓ Use Email Subject/	Filename as Title value						
ie di Minimal View (Contoso) ie di Picture Library (Contoso)	Title	[Auto Set]						
Current Projects Soffice 365 - SharePoint	Enterprise Keywords	< <type search="" to="">></type>						
	Example Choice	Red						
⊞⊶🎆 - SharePoint -	Required Text *							
	Example Date	22/02/2012						
	Region	× Manly						
		bo T C C C C C C C C C C C C C C C C C C						
	Example Lookup	Bondi [Region:Australia:NSW]						
		Bondi Beach [Region:Australia:NSW] Bowen [Region:Australia:NSW]						
•								
Files RE Test Email Message 1r1aspdj.m	sg (25.5 KB); Show more.	Manage Files						
Overwrite Existing Files?								
Scinaptic OnePlaceMail®		Save Cancel						

Managed Metadata – Full type-ahead

Release 6.1 provides the ability to add new items to the SharePoint 2010 Term Store when using the Managed Metadata Column. OnePlaceMail adheres to the SharePoint settings to determine if this option is available.

Select: Region	— ×
Please select a value from the options below	Add New Item
	K Cancel
* The new item will be created under the selected item in the tree below	4
⊡23 Region	
🛓 🖓 Australia	
Denmark	
New Zealand	
Norway	
ia⊘ USA ia⊘ California	
Sacramento	
	Select Cancel

New Items in Term Store

In a similar manner, OnePlaceMail R6.1 supports creating new Enterprise Keywords.

S OnePlaceMail - Save to SharePoint			
Location Example Document Library (Contoso)	1		
	Properties Locat	tion Content	
Contoso Contoso Contoso Contoso Contoso Contoso Contoso	Content Type	Project Document	
	✓ Use Email Subject/	Filename as Title value	
	Title	[Auto Set]	
ie - ie > Current Projects ie - ie > Office 365 - SharePoint	Enterprise Keywords	se	
i	Example Choice	Suggestions	
i - SharePoint -	Required Text *		
	Example Date	22/02/2012	
	Region	C Manly	
		< <type search="" to="">></type>	Q
	Example Lookup	< <type search="" to="">></type>	ų
· · · · · · · · · · · · · · · · · · ·			
Files 🕞 RE Test Email Message 1r1aspdj.ms	sa (25.5 KB): Show more.		Manage Files
Overwrite Existing Files?			
Scinaptic OnePlaceMail®		Sav	Cancel

Create new Enterprise Keywords

Bug Fixes Highlights

- 1. Resolved issue with site/folder sort order in Save to SharePoint window and Manage My OnePlaceMail Folders window
- 2. Resolved issue saving to Office 365 that would result in a red cross in the Save Results window and no specific error message
- 3. Resolved issue in People/Groups column where the selection was not filtering to the correct members of a specific group as per the SharePoint column setting
- 4. Resolved issue when opening a .msg file (from within Outlook) where the file in SharePoint had been sent to the Record Center and the user does not have access to the linked file in the Record Center
- Resolved error in license check "GetListTitleAndLicencingStatus Object reference not set to an instance of an object" where anonymous access is enabled and OnePlaceMail Server Components is installed

Other Updates

Improved User Interface

- a. Crisper and cleaner Outlook user interface
- b. Streamlined first use connection configuration can now be done as part of the save process
- c. Adding SharePoint connections can now be done directly in Save to SharePoint window and Manage My OnePlaceMail window
- d. Option to Manage OnePlaceMail folders directly in Outlook navigation pane

Enhanced Outlook navigation pane

- a. Add SharePoint sites (in addition to already supported Lists, Libraries, Folders and Document Sets) as favorite OnePlaceMail Folders
- b. Drag/drop to SharePoint Sites is now supported
- c. Faster navigation during a save operation with added support for drag/drop to:
 - a. My OnePlaceMail Folder
 - b. OnePlaceMail Category Folders
 - c. Recent locations
 - d. SharePoint Sites

Managed Metadata / Enterprise Keywords / Taxonomy

- 1. Create new Enterprise Keywords directly from the Save to SharePoint window
- 2. Create new Managed Metadata items directly from the Save to SharePoint window for open term sets
- 3. Type-ahead now supported in client only mode (without OnePlaceMail Server Components)

SharePoint Search Locations (with Microsoft Outlook)

- 1. Support for multiple SharePoint search locations from within Microsoft Outlook
- 2. Support for multiple SharePoint search locations from within Microsoft Word, Excel and PowerPoint

Extended support for email attribute/column mapping

- 1. Now supported in Express Edition
- 2. OnePlaceMail Server Components are no longer required

Extended support for custom list definitions

- 1. Now supported in Express Edition
- 2. OnePlaceMail Server Components are no longer required

Extended support for new claims mode authentication scenarios

- 1. Added support for Forms Based authentication
- 2. Added support for mixed authentication (e.g. Windows and Forms Based) on a single zone
- 3. Added support for anonymous access authentication when OnePlaceMail Server Components are installed

Terminal Services/Citrix

- 1. Added ability to store OnePlaceMail Data File in users roaming directory
- 2. Added support for an inclusion or exclusion list of users on a Terminal Services/Citrix server to control execution of OnePlaceMail

Microsoft Office Versions:

OnePlaceMail Release 6.1 enhancements and fixes are available for Outlook/Office 2007 and 2010 (32/64 bit). Outlook/Office 2003 remains supported under OnePlaceMail Release 6.0 and is not being enhanced further.