

# OnePlaceMail Highlights | R6.6

## Overview

### Release 6.6

- |  |   |
|--|---|
| <ul style="list-style-type: none"><li>• Navigation tree – Filter locations with type-ahead</li><li>• Navigation tree - Search locations</li><li>• Create new folders/document sets from within Outlook</li><li>• Create new lookup list items from Outlook when saving content</li></ul> | <ul style="list-style-type: none"><li>• Create new list items from Outlook</li><li>• Document set enhancements</li><li>• Configurable filename formats</li><li>• Other Enhancements / Fixes<ul style="list-style-type: none"><li>○ Load the SharePoint default view in Content grid</li><li>○ Additional Metadata</li><li>○ See Release Notes for more...</li></ul></li></ul> |
|--|---|

## Previous Release Summary

<p><b>Release 6.5</b></p> <ul style="list-style-type: none"> <li>• Access SharePoint through a new Outlook Style Interface for greater end user adoption (minimise change)</li> <li>• SharePoint views within Outlook</li> <li>• SharePoint document &amp; email previews within Microsoft Outlook</li> <li>• Search within Outlook Style Interface</li> </ul>	<ul style="list-style-type: none"> <li>• Item Actions: Insert as Link/Attachment from SharePoint, View Properties</li> <li>• List Item: Start workflows, view &amp; edit properties from Microsoft Outlook</li> <li>• Refined SharePoint tree navigation on save and browse</li> <li>• Ability to minimise save progress to allow continuation of work in other applications</li> </ul>
<p><b>Release 6.4</b></p> <ul style="list-style-type: none"> <li>• Extend SharePoint 2013 Site Mailboxes</li> <li>• Enhanced access to SharePoint content - view &amp; column support for Insert, Open and Save to SharePoint windows</li> </ul>	<ul style="list-style-type: none"> <li>• Enhanced SharePoint navigation tree</li> <li>• Enhanced document set support</li> <li>• Reduced memory footprint for greater performance</li> <li>• Support for asset libraries</li> </ul>
<p><b>Release 6.3</b></p> <ul style="list-style-type: none"> <li>• Significant performance improvements</li> <li>• Business Connectivity Service support</li> <li>• People &amp; Groups column enhancements</li> </ul>	<ul style="list-style-type: none"> <li>• Launch button from within Outlook</li> <li>• Support for SharePoint 2013 preview</li> <li>• ... and much more</li> </ul>
<p><b>Release 6.2</b></p> <ul style="list-style-type: none"> <li>• Insert from SharePoint (as links or attachments) in the email messages</li> <li>• Open from SharePoint</li> </ul>	<ul style="list-style-type: none"> <li>• Override default content type for email messages</li> <li>• Attach from file system using SharePoint Document ID</li> <li>• Save attachments – right-click</li> </ul>
<p><b>Release 6.1</b></p> <ul style="list-style-type: none"> <li>• SharePoint Search locations (within Outlook)</li> <li>• Recent locations tracking</li> </ul>	<ul style="list-style-type: none"> <li>• Site Locations</li> <li>• Managed Metadata / Enterprise Keywords / Taxonomy</li> </ul>

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## OnePlaceMail Release 6.6

### Release Focus

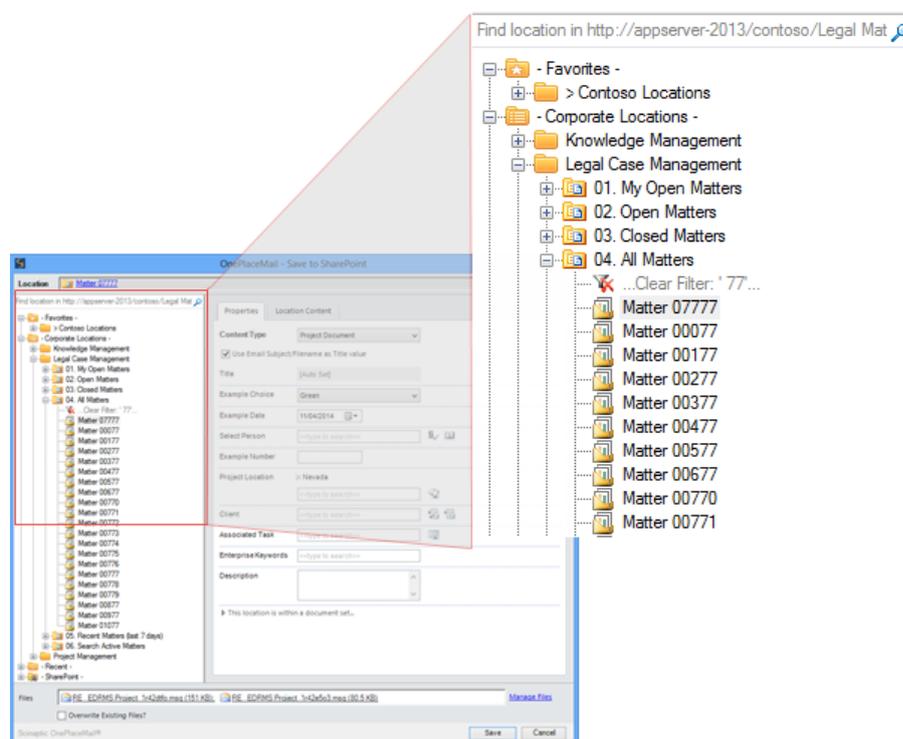
The focus for Release 6.6 is to enable the creation of real world solutions on the SharePoint platform that are intuitive, engaging and enable greater productivity. In essence, it is all about bringing your SharePoint solutions alive to ultimately achieve greater end user adoption of the SharePoint platform.

Building on the well-received capabilities of Release 6.5, further enhancements have been made to the new Outlook Style experience for SharePoint. Significant enhancements such as filtering locations on the navigation tree, searching for locations when saving and the ability to create document sets/folders without leaving Outlook are some of the new capabilities enabling the creation of engaging business solution on the SharePoint platform.

### Navigation Tree - Filter locations with type-ahead

OnePlaceMail provides a navigation tree to browse SharePoint locations, including any favorite locations within SharePoint. This navigation tree is used and is consistent across the Save to SharePoint window within Outlook, Windows Explorer, and Office applications, and also within the Insert from SharePoint, Open from SharePoint and Outlook style experience when browsing SharePoint from Outlook.

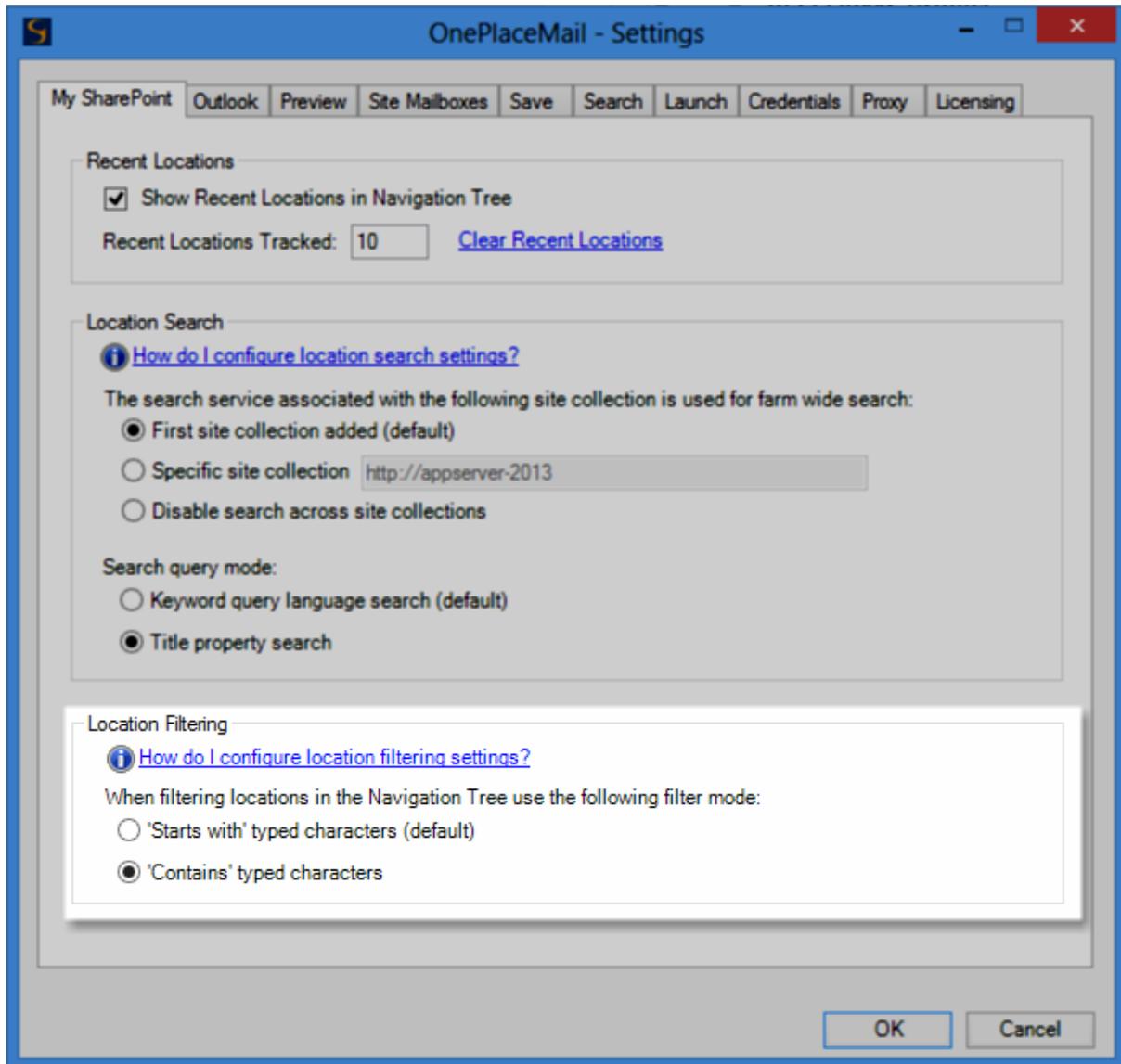
When a user selects a node in the navigation tree, such as a document library containing document sets or folders, there is now the ability to start typing the name of the document set/folder for which you would like to select. The list of document sets/folder are filtered as each character is typed.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



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

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

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



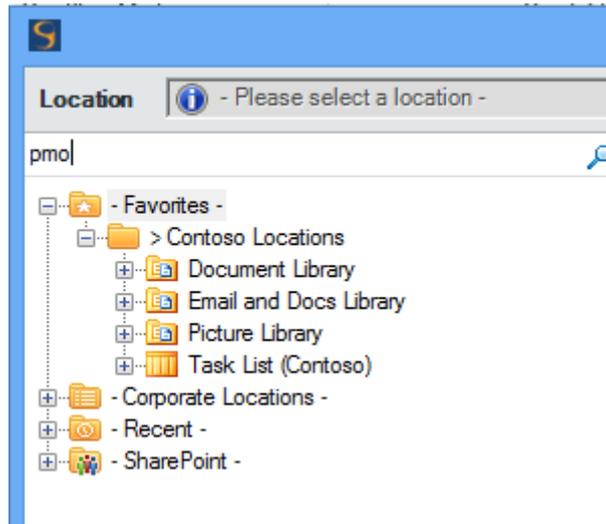
Settings for Location Filtering

## Navigation Tree - Search locations

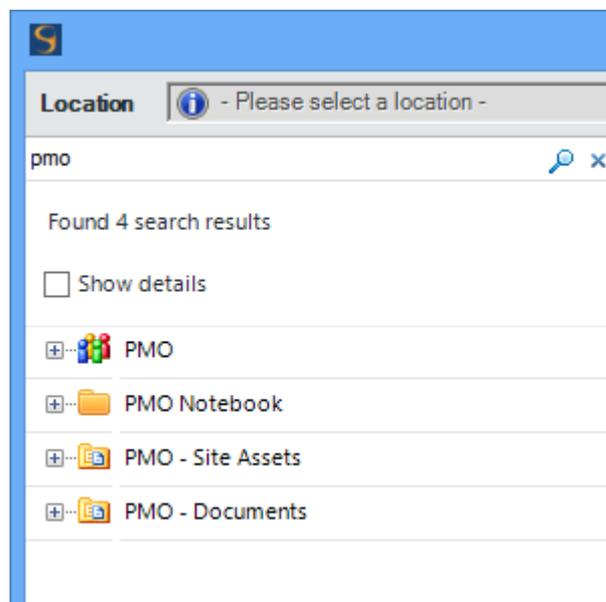
The navigation tree search uses the powerful enterprise search and indexing capabilities of SharePoint, allowing the user to efficiently find a location within SharePoint. For example, you can search for a site, library, document set and/or folder.

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

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



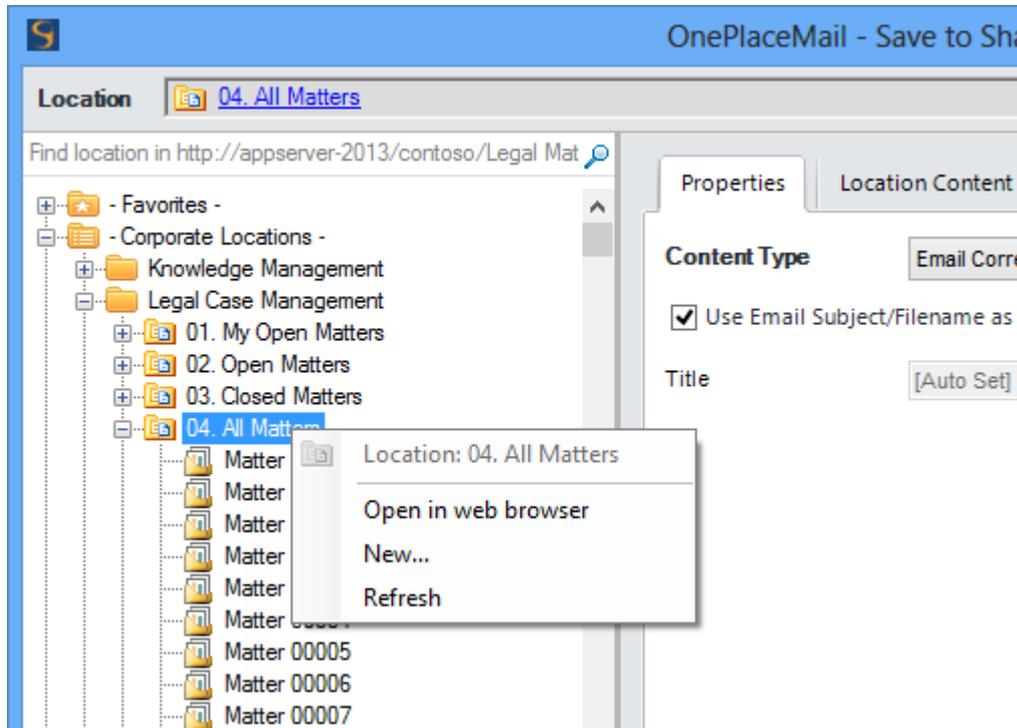
Type a search query



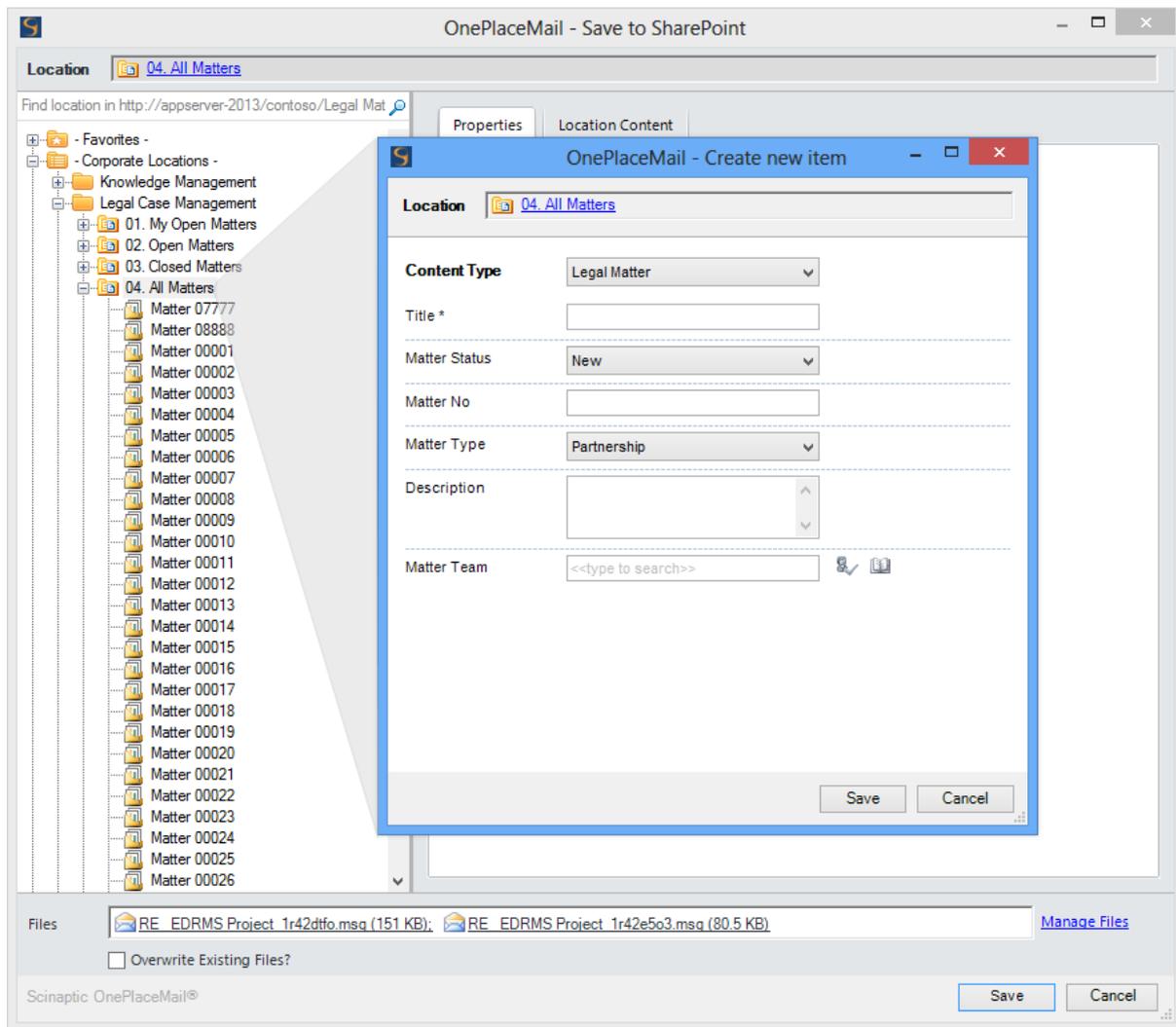
View/select a location from the search results

## Create new folders/document sets from within Outlook

From within the navigation tree, there is the ability to create new folders and document sets. This means you can start building interactive SharePoint solutions allowing end users to efficiently work with SharePoint from within their familiar business applications.



Right-Click – New...



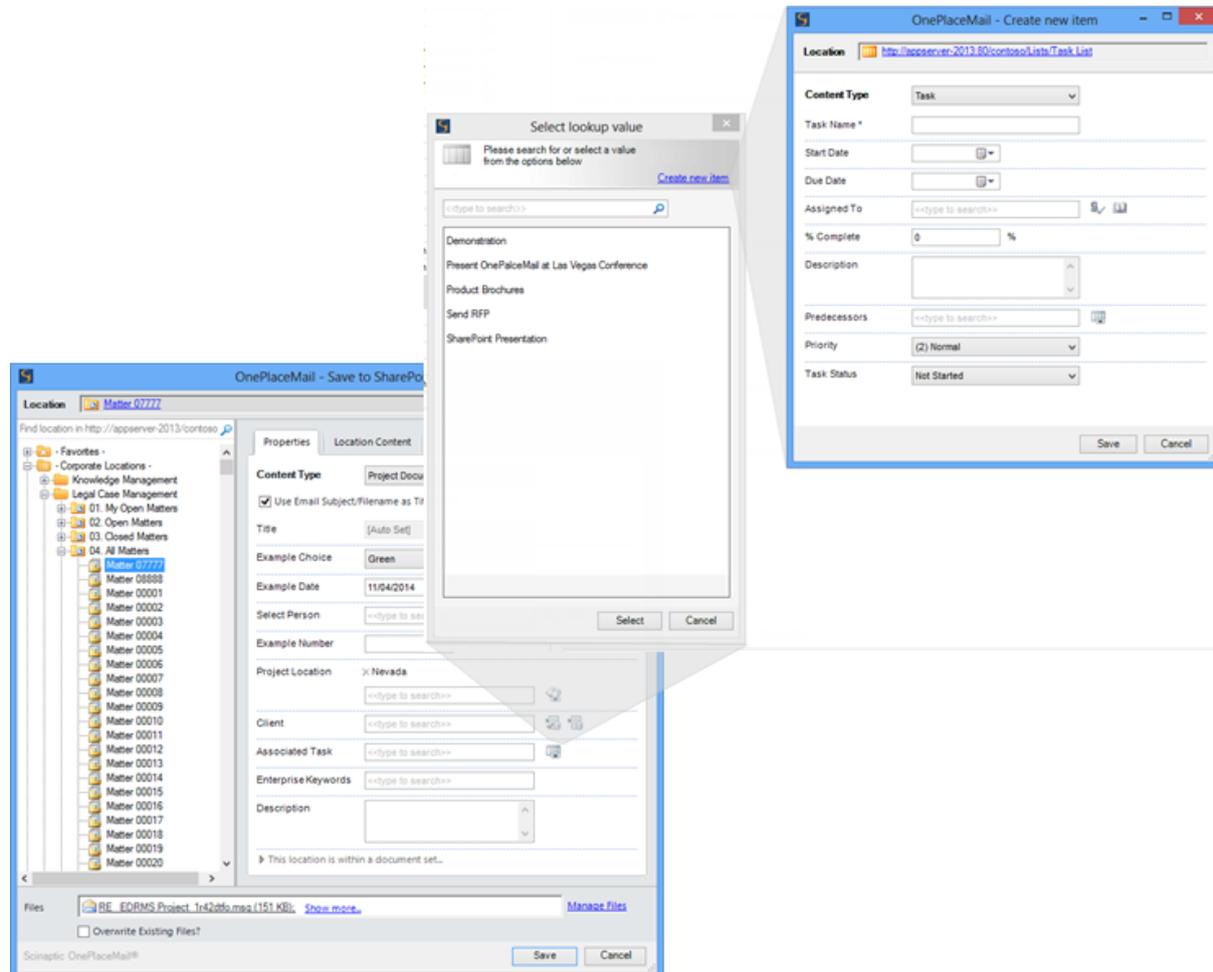
### Create a new Document Set / Folder

An end user's ability to create new document sets and folders is based on the SharePoint security permissions and settings.

## Create new lookup List Items from Outlook when saving content

When saving emails, email attachments, files and documents from office applications, OnePlaceMail allows the completion of SharePoint columns. The columns presented are based on the configuration of your SharePoint content Types and/or destination library/list.

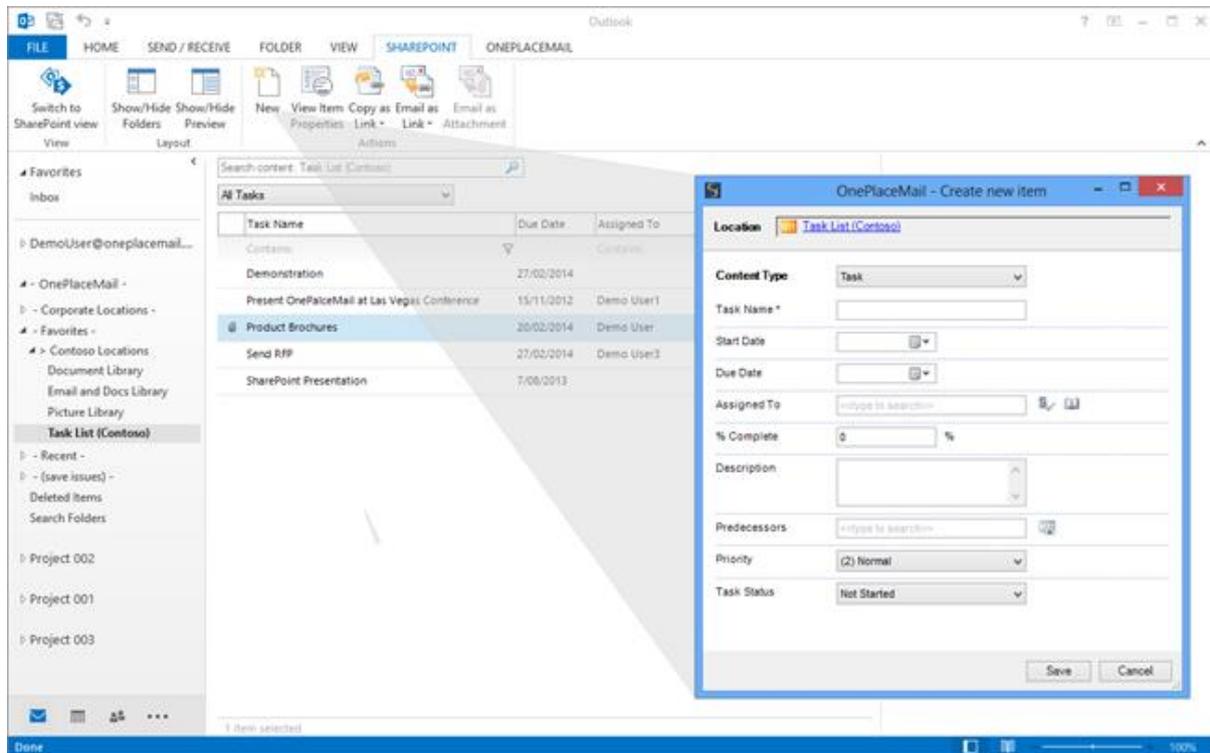
If you have included a Lookup Column to a SharePoint list, you can now create new list items on the fly (assuming you have permissions to do so). For example, you may have a lookup column to a Task List, Issue list, Contact list, Events list or Custom list.



Create new lookup list Item

## Create new List Items from Outlook

If your SharePoint solution involves end users interacting with SharePoint lists, OnePlaceMail R6.6 now provides the ability to create new list items from within Outlook.



Create new list items from Microsoft Outlook

## Document set enhancements

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

### Matter Management › Matter 05550



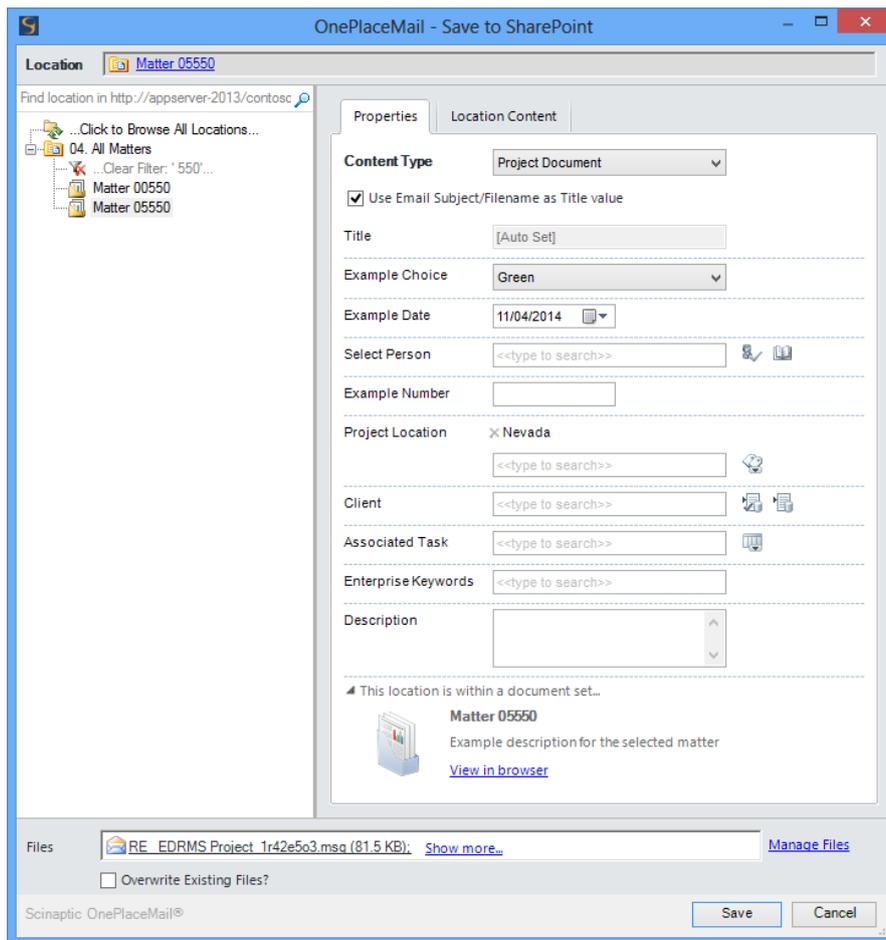
#### Matter 05550

Example description for the selected matter

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

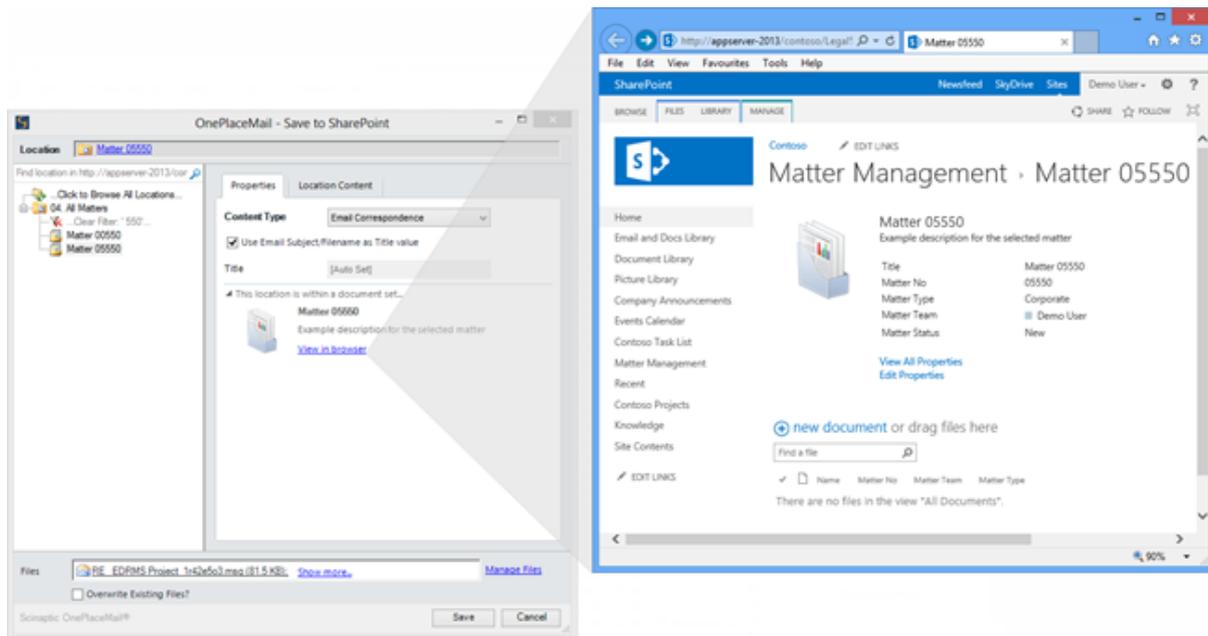
[View All Properties](#)  
[Edit Properties](#)

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



#### Save to SharePoint Window – with document set columns suppressed

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



Access document set information and content

## Configurable filename formats

OnePlaceMail R6.6 now supports custom/tokenized file naming formats when saving emails to SharePoint. There is an option of using one of our predefined standard email filename formats or alternatively creating your own custom format.

By default the filename will use the email subject and append an underscore and a unique hash code (the Email Sent Date/Time and Senders Name encoded as Base 64 text) e.g. ACME project information\_vf65c8. <http://www.scinaptic.com/support/0009.html> .

The flexibility of the custom/tokenized filename format allows you to align OnePlaceMail with your standard naming conventions.

## Other Enhancements / Fixes

Release 6.6 includes many other enhancements and bug fixes. A detailed list is available in the OnePlaceMail Release notes:

<http://www.scinaptic.com/support/oneplacemail-release-notes.html> or [Release Notes \(.pdf\)](#):

## OnePlaceMail Release 6.5

### Release Focus

Imagine if SharePoint content was presented within Microsoft Outlook with the same look and feel as your Inbox. Furthermore, imagine if you could combine the power of Outlook such as email and document preview with the strength of SharePoint views; including columns, grouping, sorting and filtering of content. This is now possible with OnePlaceMail Release 6.5.

Release 6.5 minimises change for the end user; delivering an Outlook style experience to encourage greater end user adoption of solutions built on your SharePoint Platform.

End user productivity is significantly increased through the efficient access to SharePoint content, minimal change in Microsoft Outlook user experience and the availability of actions such as Email as links, Email as attachments and access item properties for both lists and libraries items.

### Outlook Style Interface to SharePoint

When a SharePoint location (Library, List, Folder, Document Set or Site) is selected on the left navigation of Outlook, the SharePoint content is presented in an 'Outlook Style Interface'. This provides for a familiar Outlook experience for the end user when interacting with SharePoint, maintaining a high level of productivity and increasing the end user adoption of solutions built on the SharePoint platform.

The screenshot shows the Outlook interface with the 'SHAREPOINT' ribbon tab active. The main pane displays a list of emails with the following columns: Email Date, Name, Email From, Email To, and Size. The selected email is:

Email Date	Name	Email From	Email To	Size
13/02/2013 12:16...	sharepoint_2013_site_mailboxes_ov...	James Fox	Frances Ward (...)	2,379 KB

The preview pane on the right displays a document titled 'SharePoint 2013 Site Mailboxes' with the subtitle 'Overcome the Limitations'. The document content includes an abstract and a description of Site Mailboxes in SharePoint 2013.

#### OnePlaceMail: Outlook Style Interface of SharePoint content

#### End Users:

*Minimal Change + Greater Productivity = End user engagement and SharePoint solution adoption*

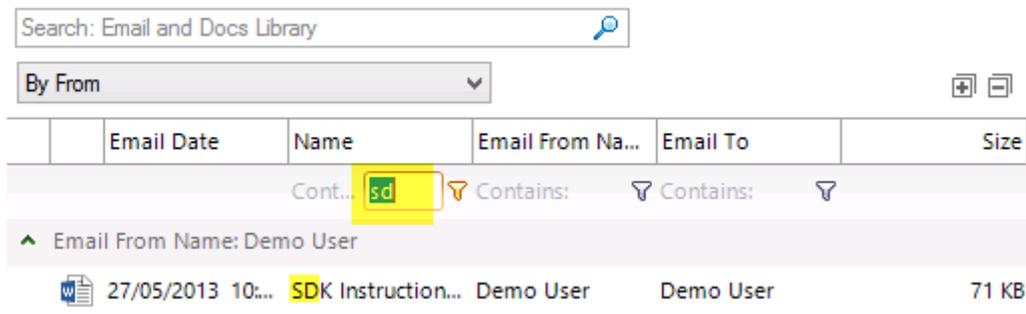
#### Business:

*End user engagement and SharePoint solution adoption = A faster ROI*

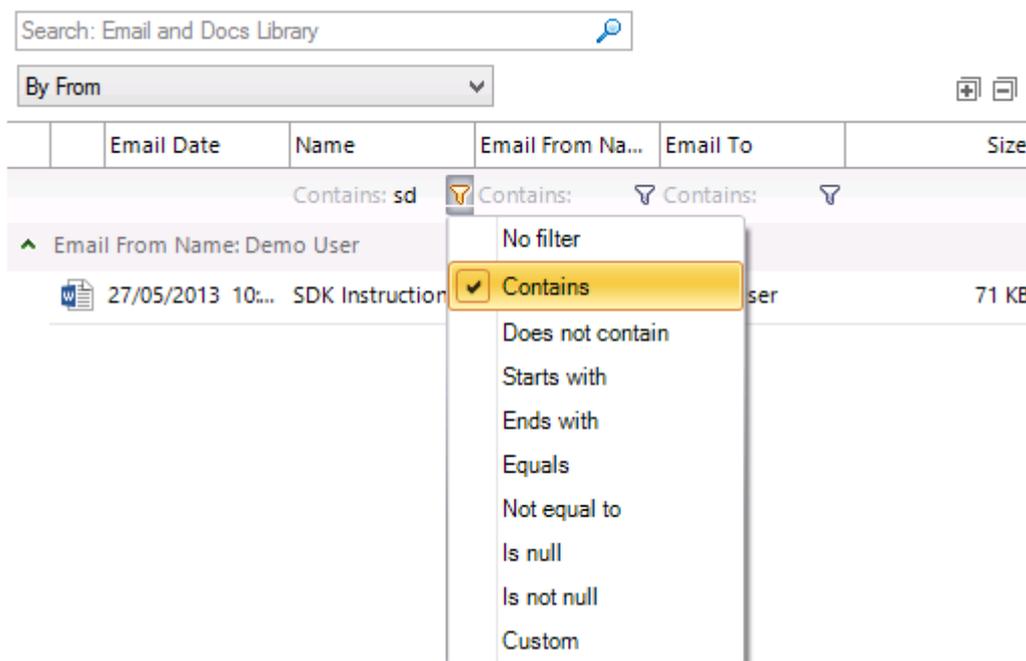


## Content Filtering and Sorting

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



### Filter view content



### Alternate filtering options

## Column Sorting

SharePoint columns can be sorted by selecting the Column title heading. By default, the columns are sorted as per the view settings in SharePoint.

## Overriding Default View

The initial view presented can be controlled by creating a view by the name of 'Content View' or any alternate name as defined in your OnePlaceMail configuration. This allows you to customise the experience when accessing SharePoint locations via Microsoft Outlook. For example, a Task List can default to 'My Tasks'.

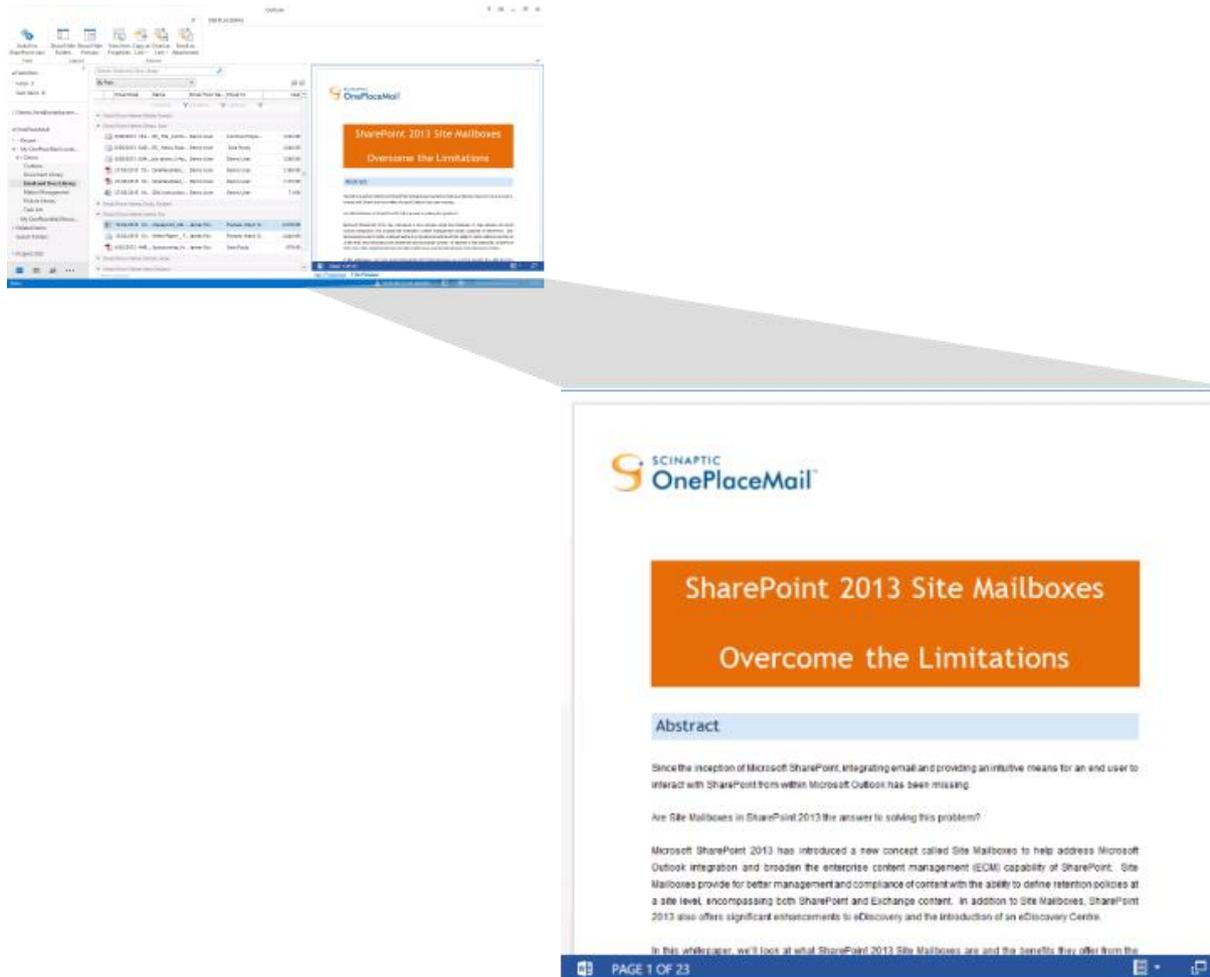
- See: <http://www.scinaptic.com/support/0120.html>

If no 'Content View' has been specified, the 'Explorer view' will be displayed by default.

## SharePoint Document & Email previews within Outlook

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

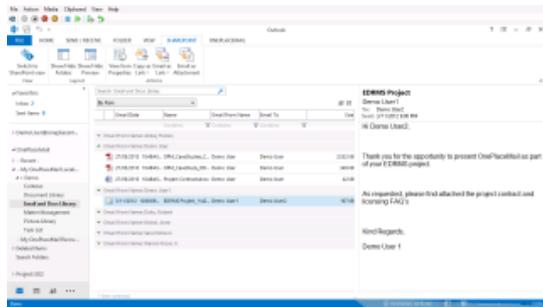
### Embedded Preview Using Office Web Application Server



### Document/File Preview using Office Web Apps

## Embedded Preview of Email Messages

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



### **EDRMS Project**

Demo User1

To: Demo User2

Sent: 3/11/2012 9:00 PM

Hi Demo User2,

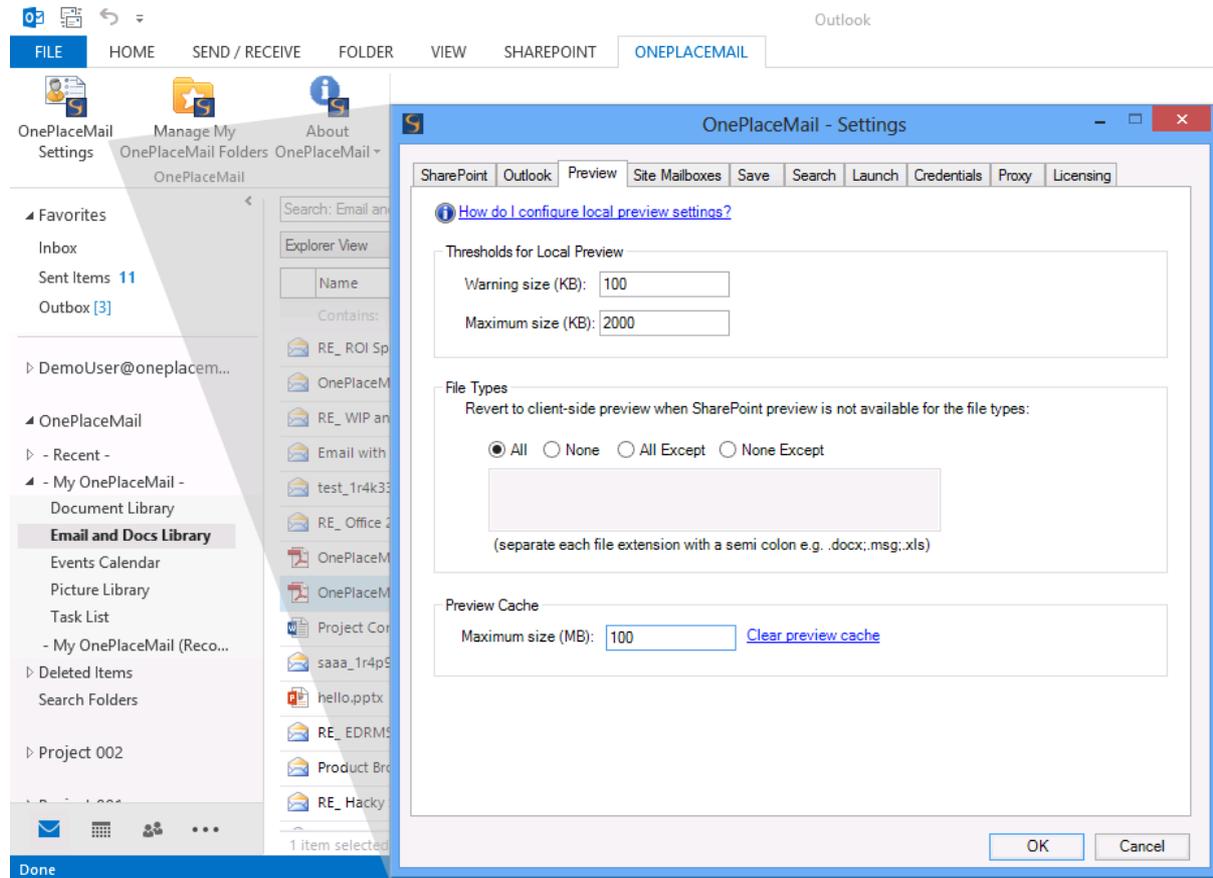
Thank you for the opportunity to present OnePlaceMail as part of your EDRMS project.

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

Kind Regards,  
Demo User 1

Preview email messages

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

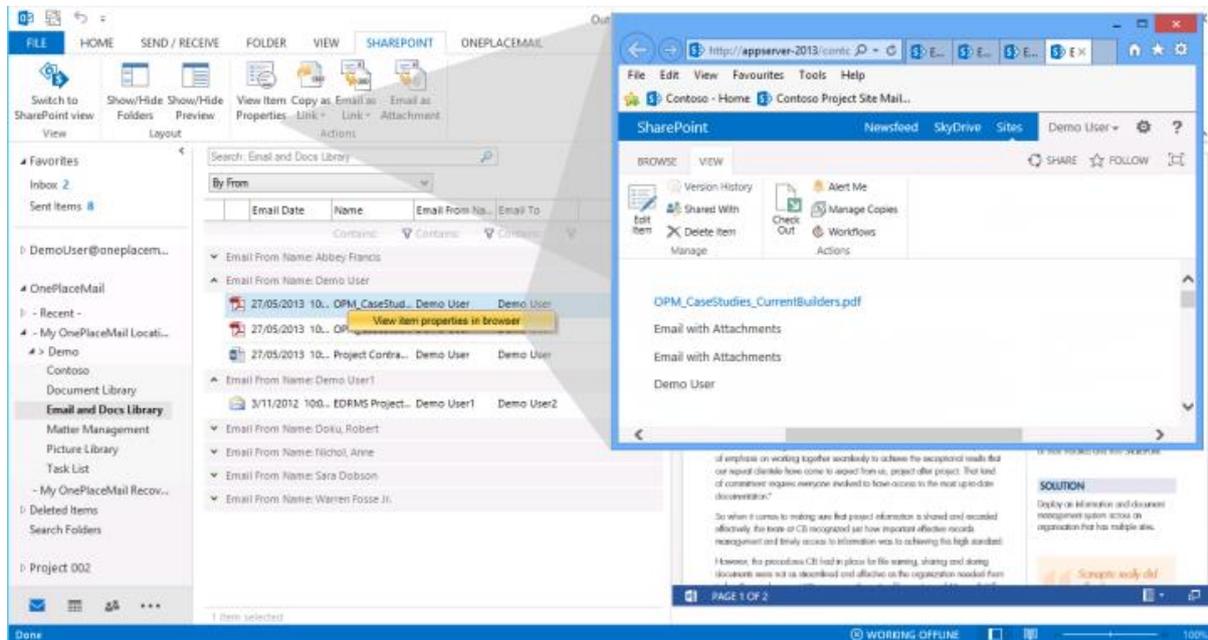


**Governance and Performance Controls for Local Previews**

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

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

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



### Access Item Properties

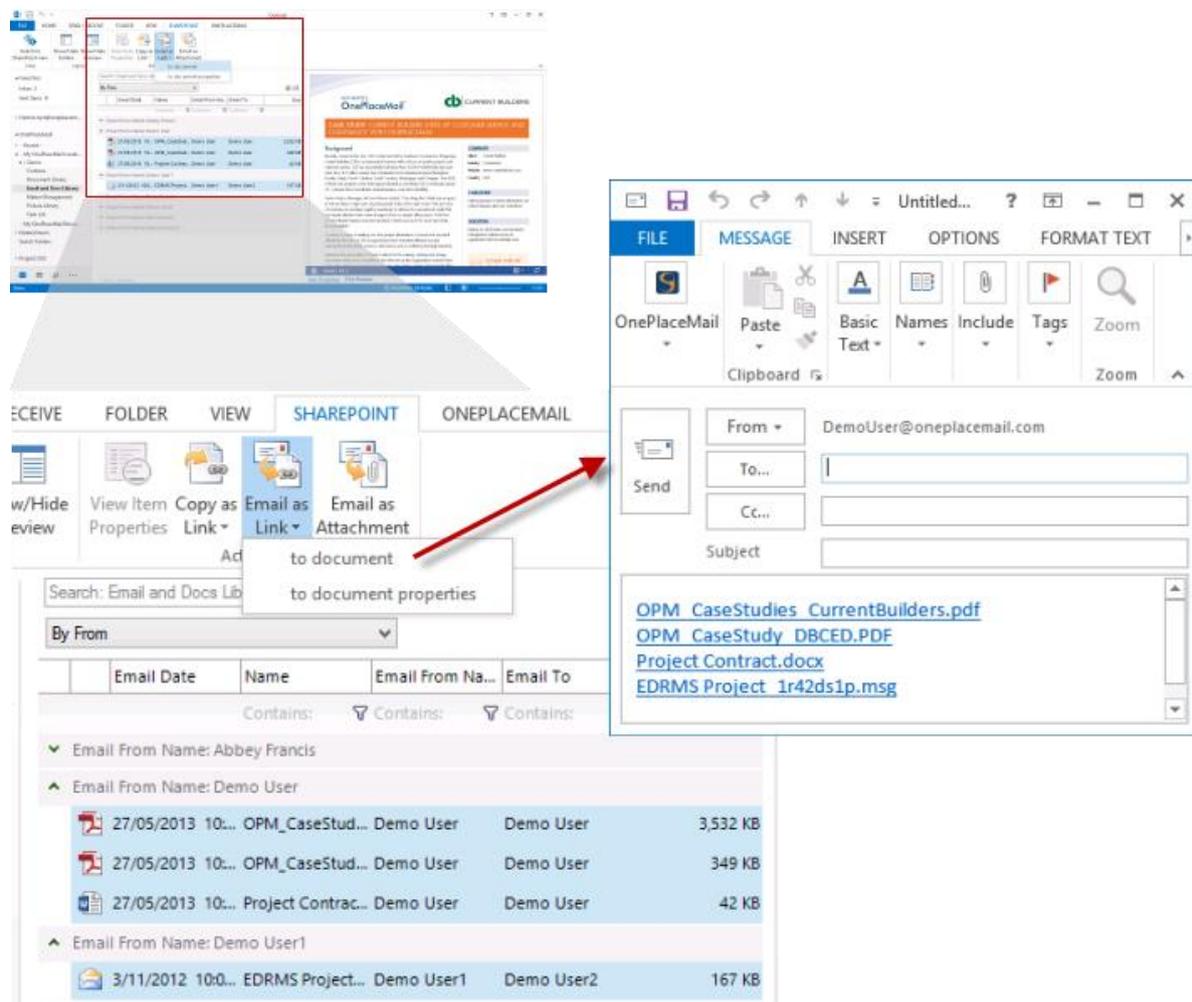
## Actions: Insert as Link/Attachment from SharePoint, View Properties

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

### Email as Links

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

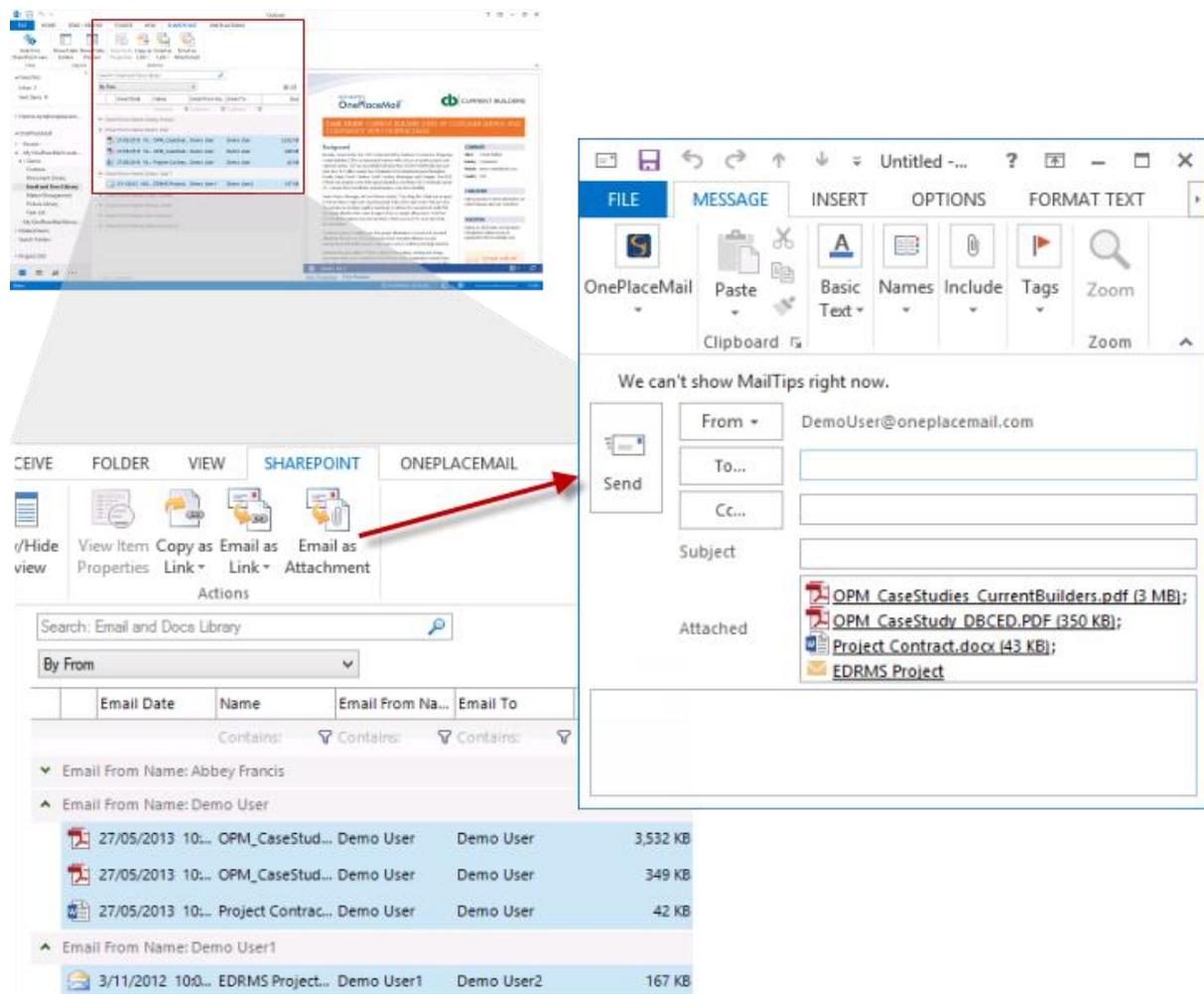
*Sending links to content stored in SharePoint helps reduce large attachments being sent across the network and encourages better collaboration on a single instance of the latest document within SharePoint.*



Insert selected items as Links

## Email as Attachments

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

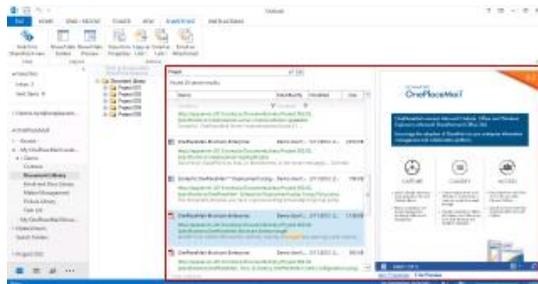


**Insert selected items as attachments**

*When writing an email, OnePlaceMail also provides an 'Insert from SharePoint' capability to add additional attachments and/or links to SharePoint content.*

## Search within the Outlook Style Interface

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



Project

Found 29 search results.

Name	Modified By	Modified	Size
Contains: <a href="#">http://appserver-2013/contoso/DocumentLibrary/Project 002/02.Specifications/oneplacemail-server-implementation-guidedocx</a>			
Scinaptic   OnePlaceMail Server ImplementationGuide 6.1 ...			
OnePlaceMail-Brochure-Enterprise	Demo User1,...	3/11/2012 2:...	2,874 KB
<a href="#">http://appserver-2013/contoso/DocumentLibrary/Project 002/02.Specifications/oneplacemail-highlightsdocx</a>			
Insert from SharePoint (as links or attachments) in the email messages - Override			
Scinaptic OnePlaceMail™ Deployment Using...	Demo User1,...	3/11/2012 2:...	798 KB
<a href="#">http://appserver-2013/contoso/DocumentLibrary/Project 002/02.Specifications/OnePlaceMail- Enterprise Deployment using Group Policy.docx</a>			
The document assumes you have a good working knowledge of group policy			
OnePlaceMail-Brochure-Enterprise	Demo User1,...	3/11/2012 2:...	1,158 KB
<a href="#">http://appserver-2013/contoso/DocumentLibrary/Project 002/02.Specifications/OnePlaceMail-Brochure-Enterprise.pdf</a>			
Benefit from better information visibility, sharing of project key learning's and capture			
OnePlaceMail-Brochure-Enterprise	Demo User1,...	3/11/2012 2:...	563 KB
<a href="#">http://appserver-2013/contoso/DocumentLibrary/Project 002/02.Specifications/OnePlaceMail- How to Deploy OnePlaceMail Client Configuration using</a>			

1 item selected

6.2

**SCINAPTIC**  
**OnePlaceMail™**

OnePlaceMail connects Microsoft Outlook, Office and Windows Explorer to Microsoft SharePoint and Office 365.

Encourage the adoption of SharePoint as your enterprise information management and collaboration platform.

**CAPTURE**

- Detect valuable information over-topped in Microsoft Outlook inboxes.
- Reduce compliance and records management risk through better email management.

**CLASSIFY**

- Capture and promote email attributes to SharePoint for a complete record of an email message.
- Clearly content from Outlook, File Explorer and Office using links and taxonomy and SharePoint metadata.

**ACCESS**

- Bring SharePoint and Office 365 to the user within Microsoft Outlook.
- Search and insert items from SharePoint within Microsoft Outlook.

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### Search SharePoint from within the Outlook Style Interface

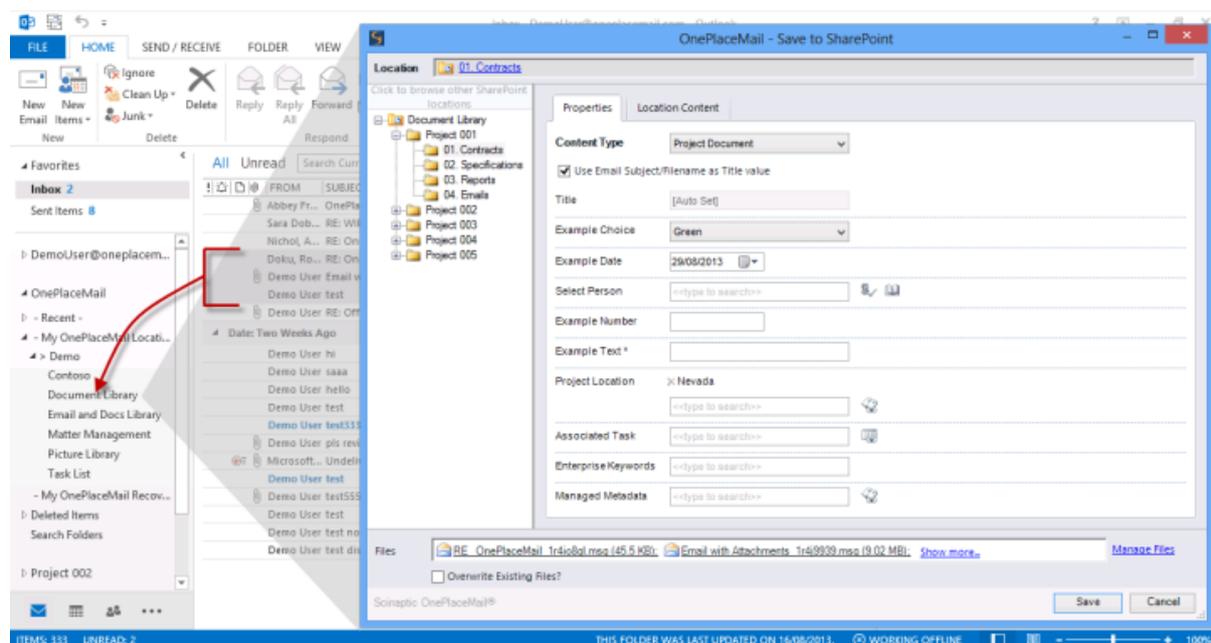
## Library Folder Hierarchy

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

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

## Saving to SharePoint

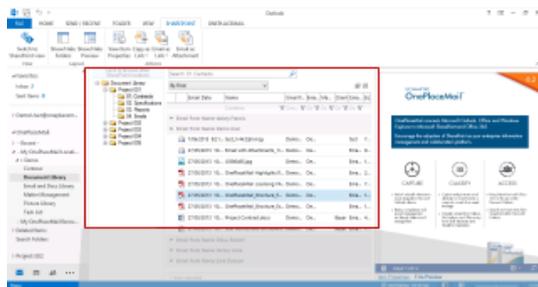
The Save to SharePoint window presents the sub-folders for the location you have selected to save content.



### Save to Document Sets & Large Folder Structures within SharePoint

## Browse SharePoint

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



Click to browse other SharePoint locations

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

Search: 01. Contracts

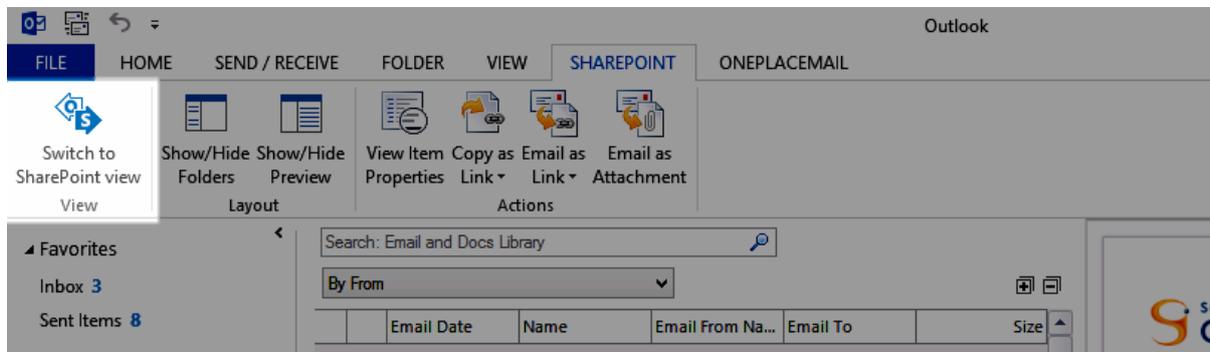
By From

	Email Date	Name	Email F...	Ema...	Ma...	Client	Ema...	Siz
Contains: <span>Con...</span> <span>Co</span> <span>Co</span> <span>Co</span> <span>Co</span> <span>Co</span> <span>Co</span>								
Email From Name: Abbey Francis								
Email From Name: Demo User								
	7/06/2013 8:21:...	test_1r4k33jhmsg	Demo...	De...			test	7...
	27/05/2013 10:...	Email with Attachments_1r...	Demo...	De...			Ema...	9...
	27/05/2013 10:...	J0386485.jpg	Demo...	De...			Ema...	1...
	27/05/2013 10:...	OnePlaceMail Highlights R...	Demo...	De...			Ema...	2...
	27/05/2013 10:...	OnePlaceMail Licensing FA...	Demo...	De...			Ema...	7...
	27/05/2013 10:...	OnePlaceMail_Brochure_E...	Demo...	De...			Ema...	1...
	27/05/2013 10:...	OnePlaceMail_Brochure_Ex...	Demo...	De...			Ema...	1...
	27/05/2013 10:...	Project Contract.docx	Demo...	De...		Bayer	Ema...	4...

**Browse Library Document Sets & Large Folder Structures**

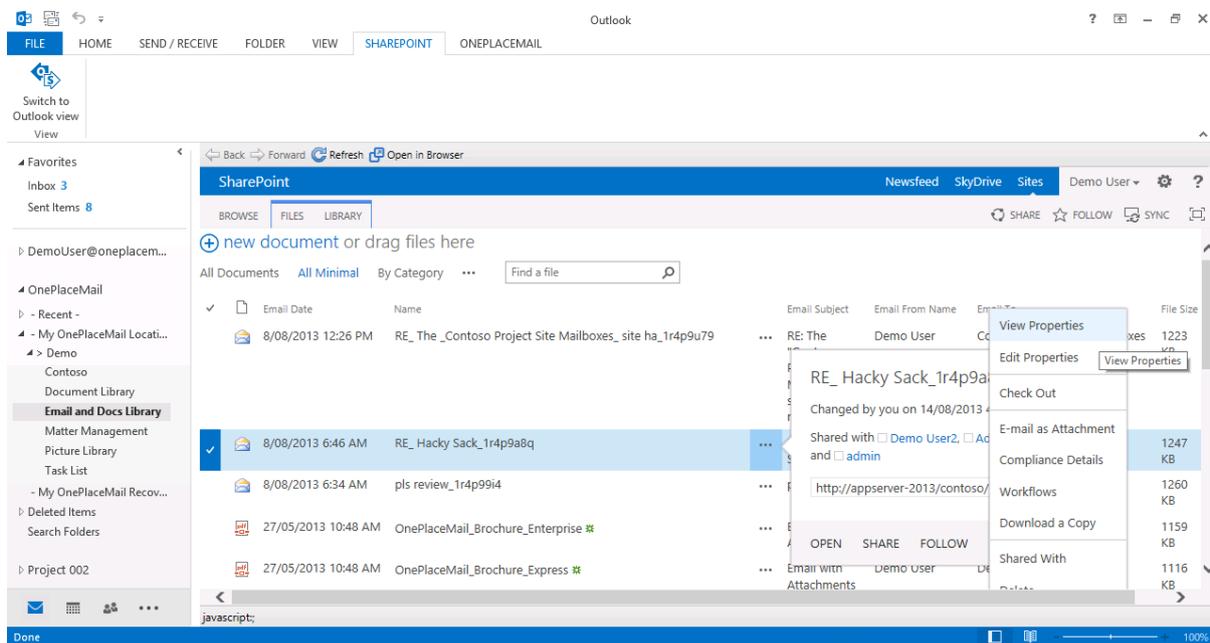
## Outlook / SharePoint Toggle

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



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

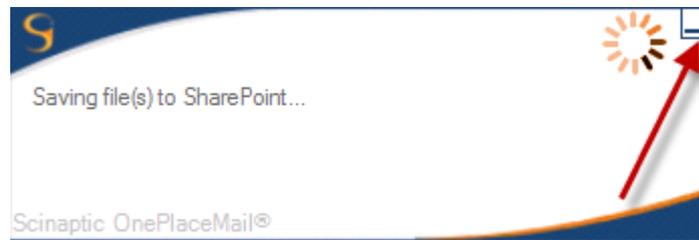
The web browser interface provides the full capabilities of Microsoft SharePoint from within Microsoft Outlook.



SharePoint Web Browser Interface – with ability to toggle back to Outlook Style Interface

## Minimise upload progress

When saving content to SharePoint, the 'Save to SharePoint' progress screen can be minimised. This allows the user to continue work within other applications while items are saved to SharePoint.



## Other Updates

Release 6.5 includes a number of other significant enhancements and bug fixes as detailed in the Release Notes.

### Release Notes

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

## OnePlaceMail Release 6.4

### Release Focus

Release 6.4 future proofs your investment in the SharePoint platform. Full support is now provided for both extending and co-existing with [SharePoint 2013 Site Mailboxes](#).

A significant focus has been placed on the speed of access to content stored within SharePoint from desktop applications. The existing Insert from SharePoint, Open from SharePoint and Save to SharePoint windows have seen significant enhancements with support for SharePoint Views and Column rendering.

Release 6.4 also delivers many other fantastic enhancements for the capture, classification and access to SharePoint content from desktop applications. This has all been delivered with a smaller memory footprint and greater overall performance.

### Extend SharePoint 2013 Site Mailboxes

Microsoft SharePoint 2013 introduced a new concept called Site Mailboxes to help address Microsoft Outlook integration with SharePoint and provide better information management capability. OnePlaceMail R6.4 now supports Site Mailboxes, allowing you to extend their capabilities and also have OnePlaceMail work intuitively alongside Site Mailboxes for greater flexibility.

#### **White Paper - SharePoint 2013 Site Mailboxes - Overcome the limitations**

A free White Paper has been published describing Site Mailboxes, their benefits, limitations and how OnePlaceMail R6.4 extends Site Mailboxes to overcome these limitations to enable broader business solutions.

#### **Extensions to SharePoint 2013 Site Mailboxes**

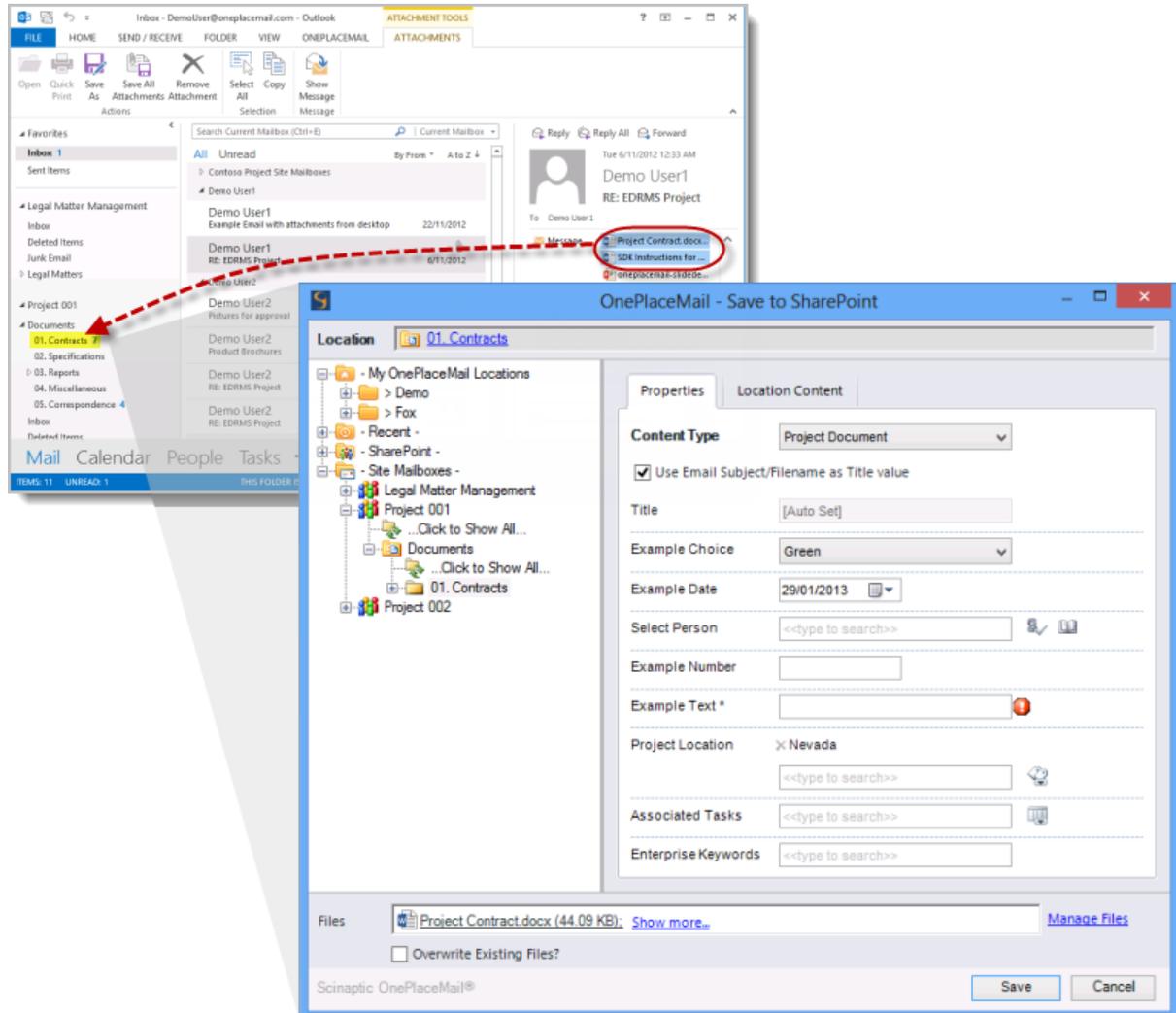
Watch the [SharePoint 2013 Site Mailboxes videos](#) and download the [Free White Paper](#) for screenshots and further details for the enhancements below:

1. Automatically capture and promote email attributes when saving emails to Site Mailboxes
2. Automatically capture and promote email attributes when saving email attachments to Site Mailboxes
3. Allow users to tag content with custom metadata when saving to Site Mailboxes (available in Outlook, File Explorer and Office (Word, Excel and PowerPoint))
4. Support for multiple Content Types
5. Validation of metadata
6. Save to Site Mailboxes from Word, Excel and PowerPoint
7. Save to Site Mailboxes from File Explorer
8. Access SharePoint Document Management capabilities from Site Mailboxes
9. Switch between SharePoint View/Exchange Style view
10. View/Edit SharePoint Item Properties from Exchange Style Views
11. Insert Content as Links/Attachments from Site Mailboxes
12. Send and File to Site Mailboxes

### Tag content with Custom Metadata

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

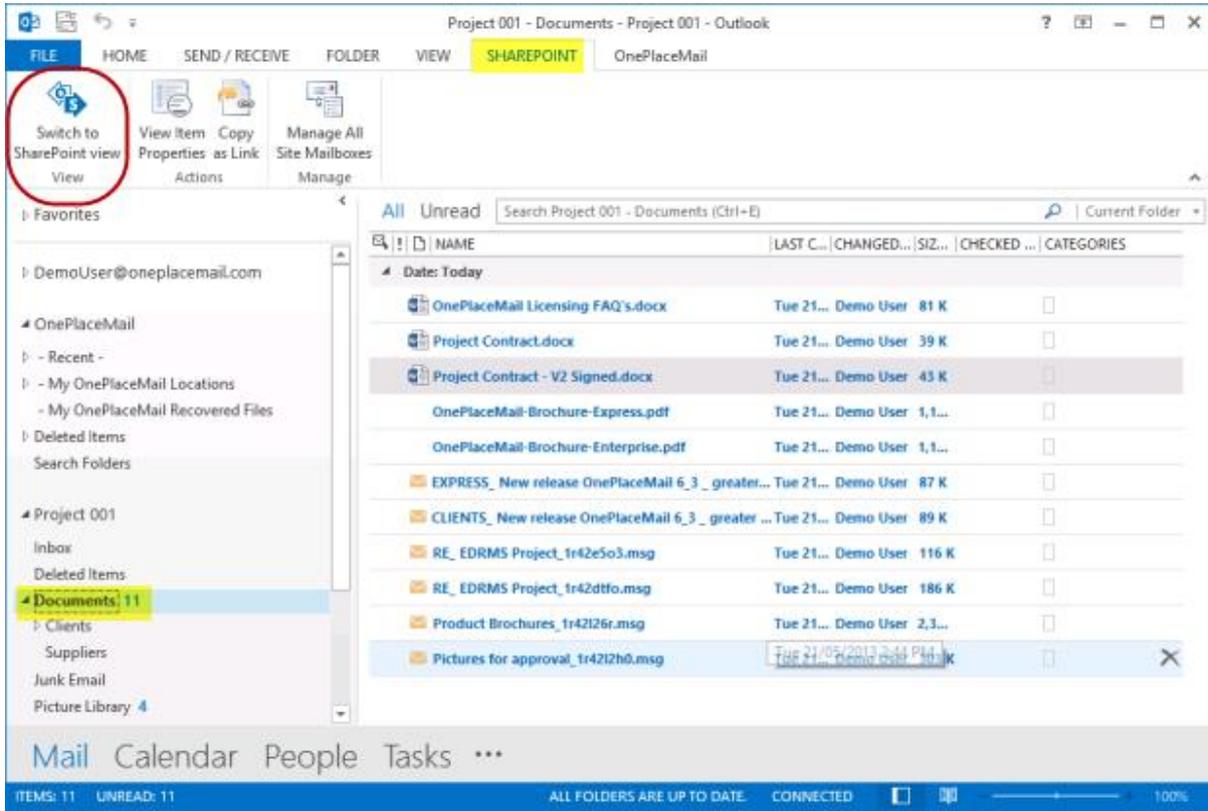
Refer to [Page 11 of the White Paper](#) for further details on tagging content when saving to SharePoint Site Mailboxes.



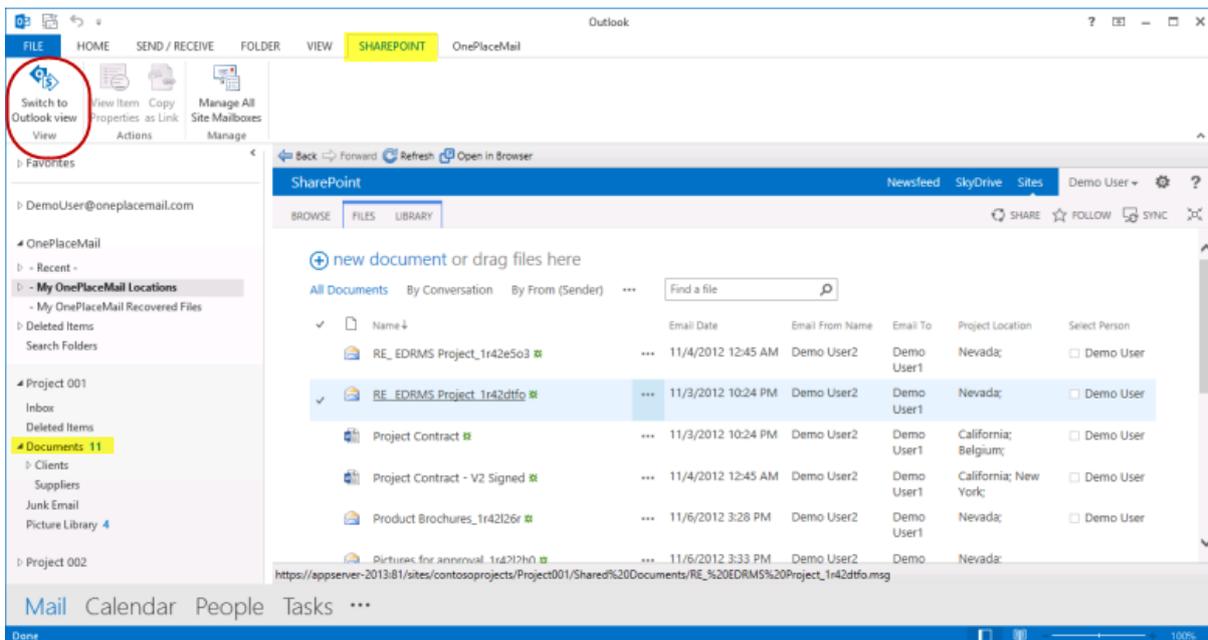
Tag content with custom metadata when saving to a Site Mailbox

### Access SharePoint document management capabilities from Site Mailboxes

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



Site Mailbox – SharePoint Tab: Toggle from Exchange style view to SharePoint view



## Site Mailbox – SharePoint Tab: Toggle from SharePoint view to Exchange style view

## Enhanced Access to SharePoint Content

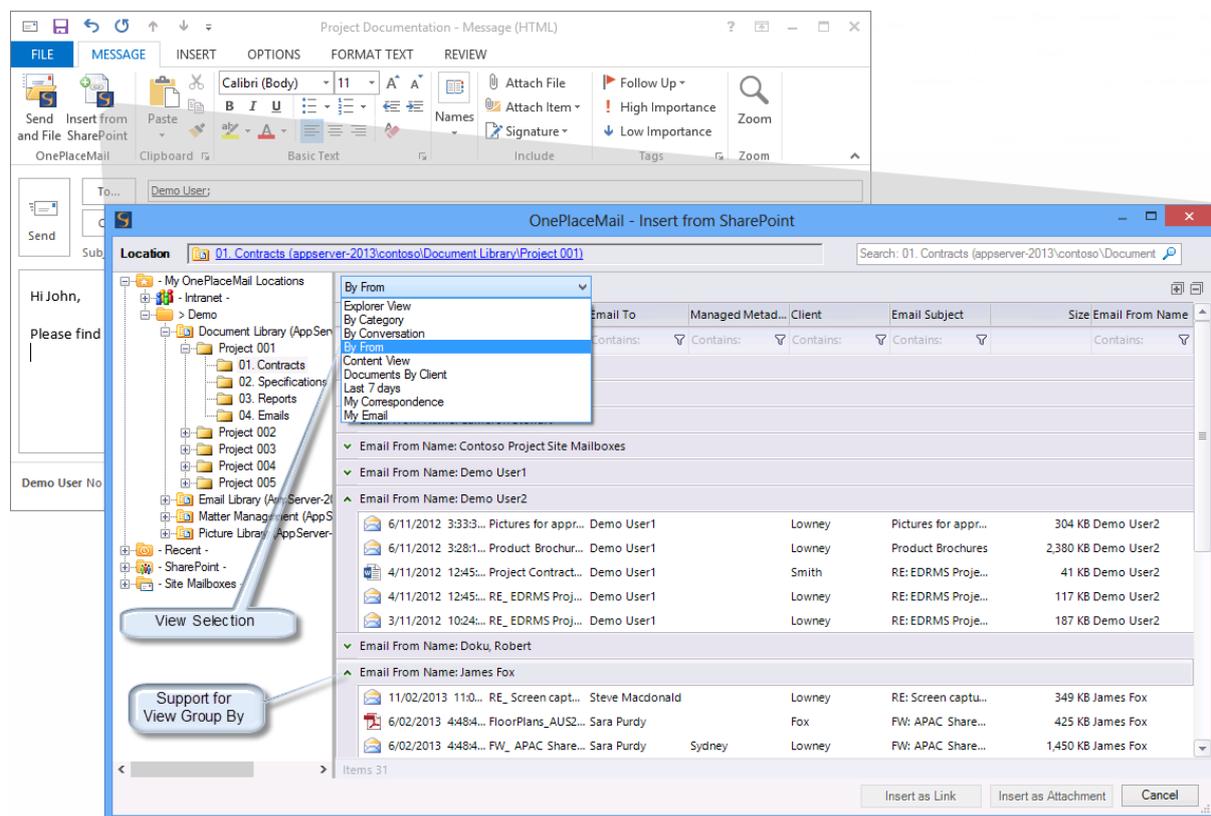
### Insert from SharePoint

The Insert from SharePoint window allows you to insert links or add documents as attachments to an email message. Items can be selected from SharePoint libraries, lists and also Site Mailbox library locations.

#### Support for SharePoint views and columns

Release 6.4 adds some significant enhancements to the Insert from SharePoint Window. These include:

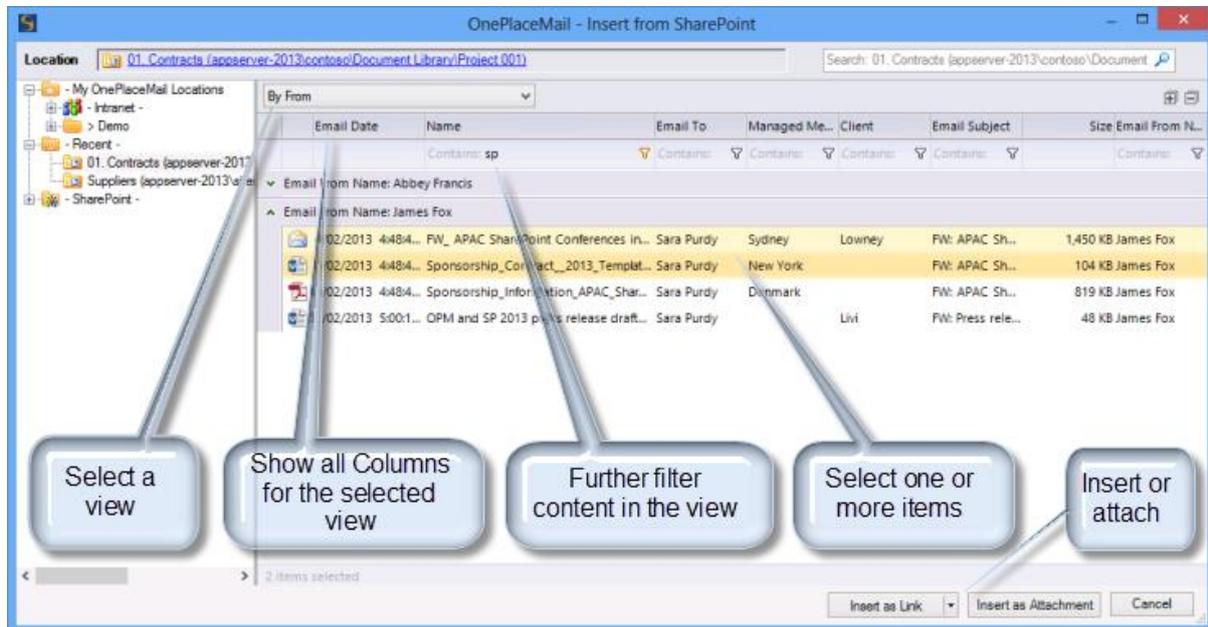
1. Support for view selection
  - a. Public views
  - b. Private views
2. Support for all standard SharePoint column types within views (e.g. managed metadata, lookup, number, text, external data columns, choice, etc...)
3. Adherence to filtering criteria defined for SharePoint views
4. Support for view group By columns
5. Support for view sort order



### View Selection and support for group by/view filtering

### Filter SharePoint view results

SharePoint items displayed in the selected view can be further refined using the column heading filters. This provides a fast way to locate an item in SharePoint.

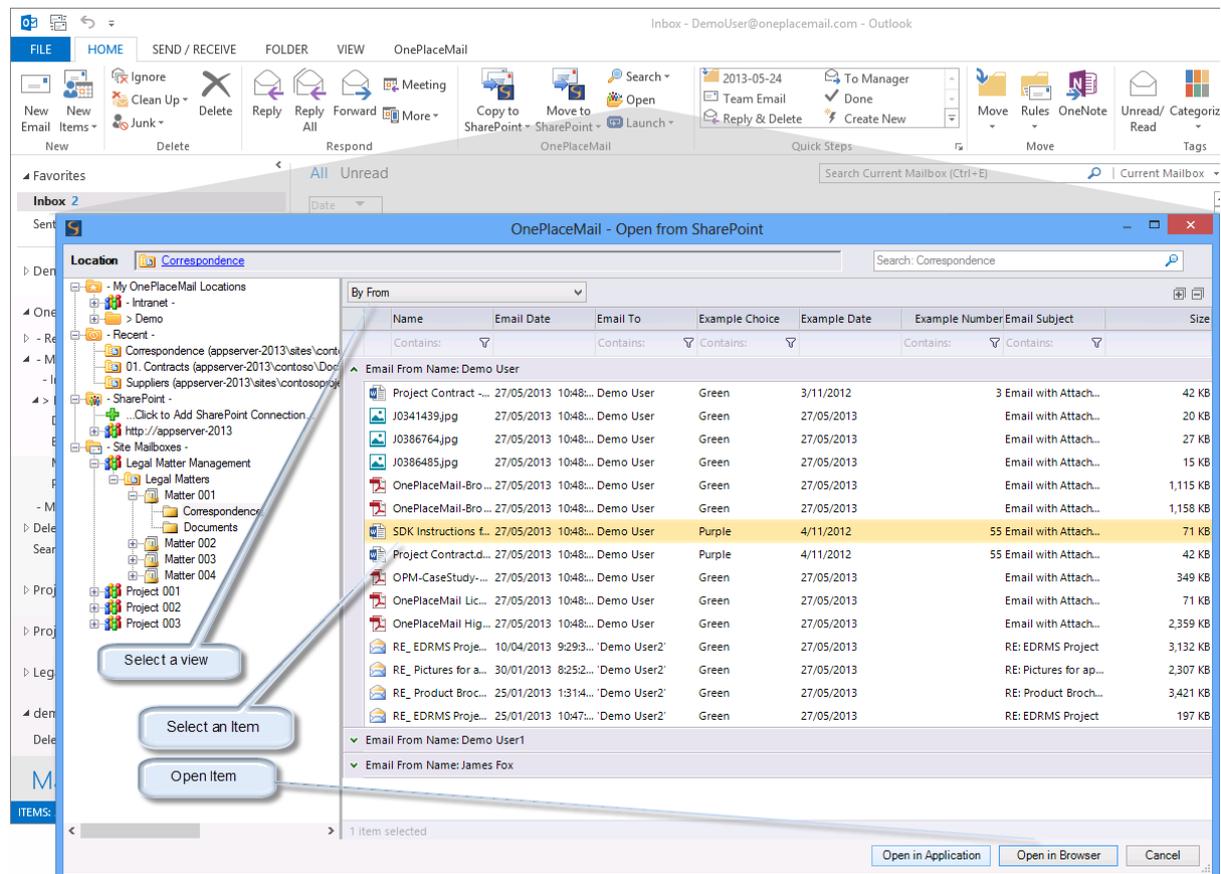


Filter content from the SharePoint view

## Open from SharePoint

The Open from SharePoint window allows the user to explore SharePoint (security trimmed), recent locations, bookmarked locations and Site Mailboxes to open documents. This capability is available from Microsoft Outlook and Microsoft Office (Word, Excel and PowerPoint) and allows the items to open in the browser or native application.

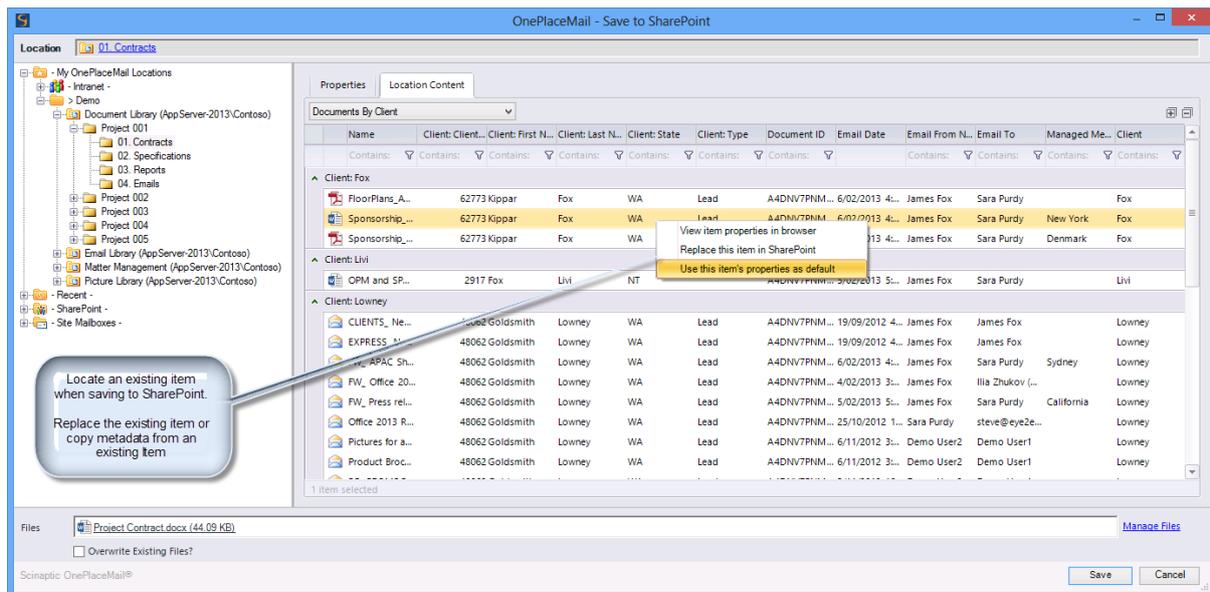
The Open from SharePoint window includes all the same enhancements described for the Insert from SharePoint window above regarding the support for view selection, display of columns and filtering of content.



Open from SharePoint window

## Location Content

The location content tab of the 'Save to SharePoint' window enjoys the same enhancements made available in the Insert and Open from SharePoint window. Therefore, locating an item in SharePoint to replace, version or copy metadata from is streamlined when saving to SharePoint.



**Location Content Tab – Save to SharePoint**

**Support for an alternate default view**

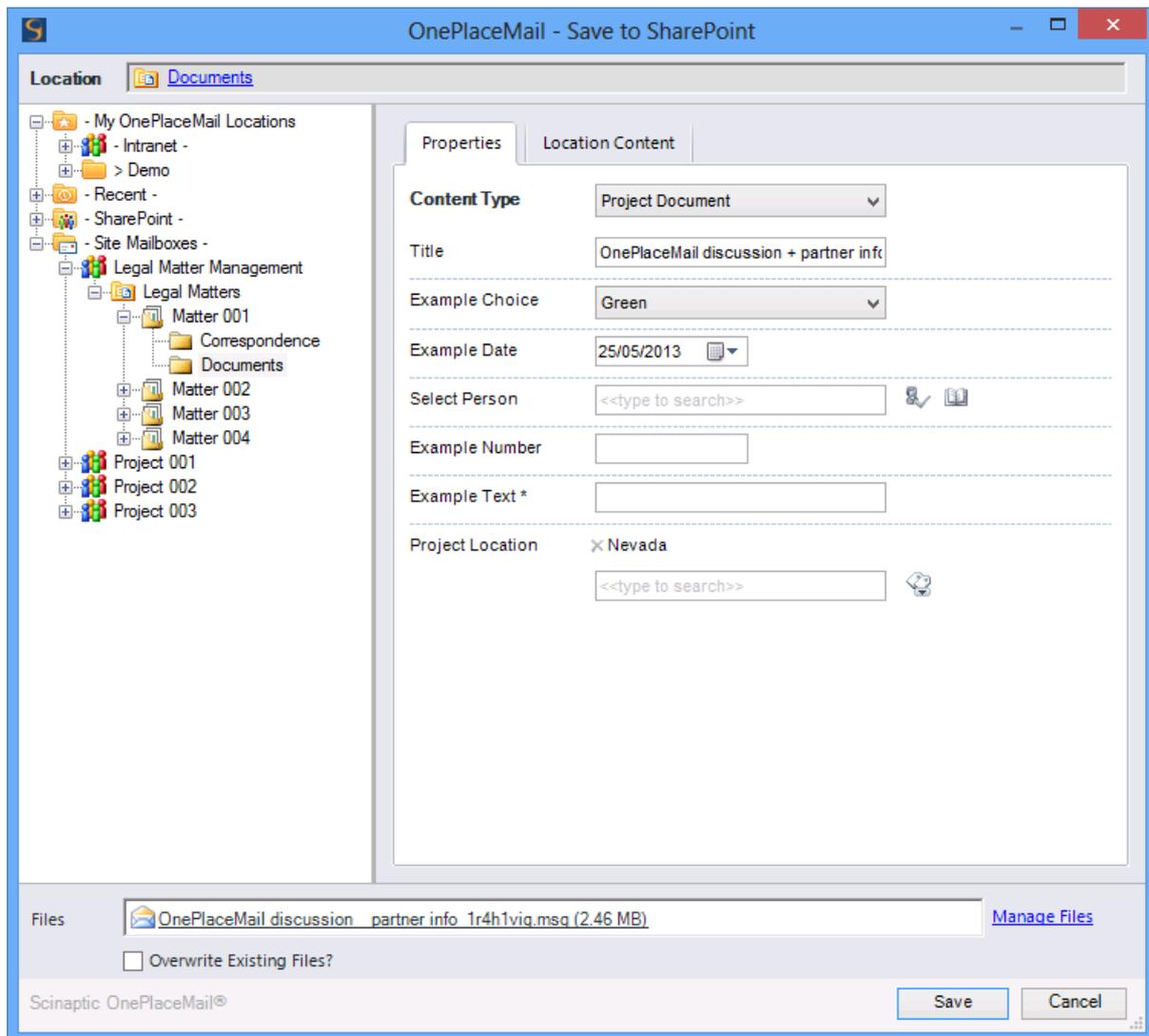
OnePlaceMail presents an Explorer View along with all other public and private views available for the selected location. If you prefer the initial view presented to contain specific SharePoint columns, filtering criteria, column grouping and sorting, OnePlaceMail allows you to define a view to present by default. Therefore, the initial view shown to the user is not restricted to either the explorer view or the default view of the library.

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

**Enhanced Document Set Support**

Release 6.4 includes enhancements for SharePoint document sets:

1. Document sets display with unique icon when browsing SharePoint locations
2. Support for folders within document sets (available within SharePoint 2013)
3. Support for sorting of content types according to SharePoint New Button order



Save to SharePoint window – Document Set Support

## Enhanced SharePoint Navigation Tree

The SharePoint Navigation Tree (used in Save, Open, Insert windows) has been enhanced to provide more flexibility when designing your solutions.

### Folder structure can be driven from a custom SharePoint view

Release 6.4 provides the ability for you to define a view within the selected library/list to control the folders / document sets presented within the SharePoint navigation tree.

*For example, the view filter criteria may remove all documents sets/folder with a column called 'Status' containing a value of 'Closed'.*

### Throttling and Performance

In addition to providing great usability, the ability to define a view to filter the navigation tree also:

1. Allows you to work within SharePoint 2010/2013 throttling limits
2. Provides for increased performance in retrieving folder structures and navigating SharePoint

## Improved Memory Usage and Network Bandwidth

OnePlaceMail R6.4 memory usage has been optimized to deliver great performance and stability over previous releases. This has been made available in Outlook/Office 2013, 2010 and 2007.

Network bandwidth when accessing SharePoint data from Outlook and Microsoft Office (Word, Excel and PowerPoint) has been optimized and offers significant performance improvements over the previous release.

## Other Updates

Release 6.4 includes a number of other significant enhancements and bug fixes as detailed in the Release Notes.

### Release Notes

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

## 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
- Provides full support for both the pop-up picker user interface and resolve actions
- Provides support for External Content Type filters
- Delivers high performance over large datasets

**Watch Video:** This screencast shows '[How to use Business Connectivity Services from within Microsoft Outlook](http://youtu.be/qMsWXDJzmxE?hd=1)' (<http://youtu.be/qMsWXDJzmxE?hd=1>) and demonstrates the new capabilities in action.

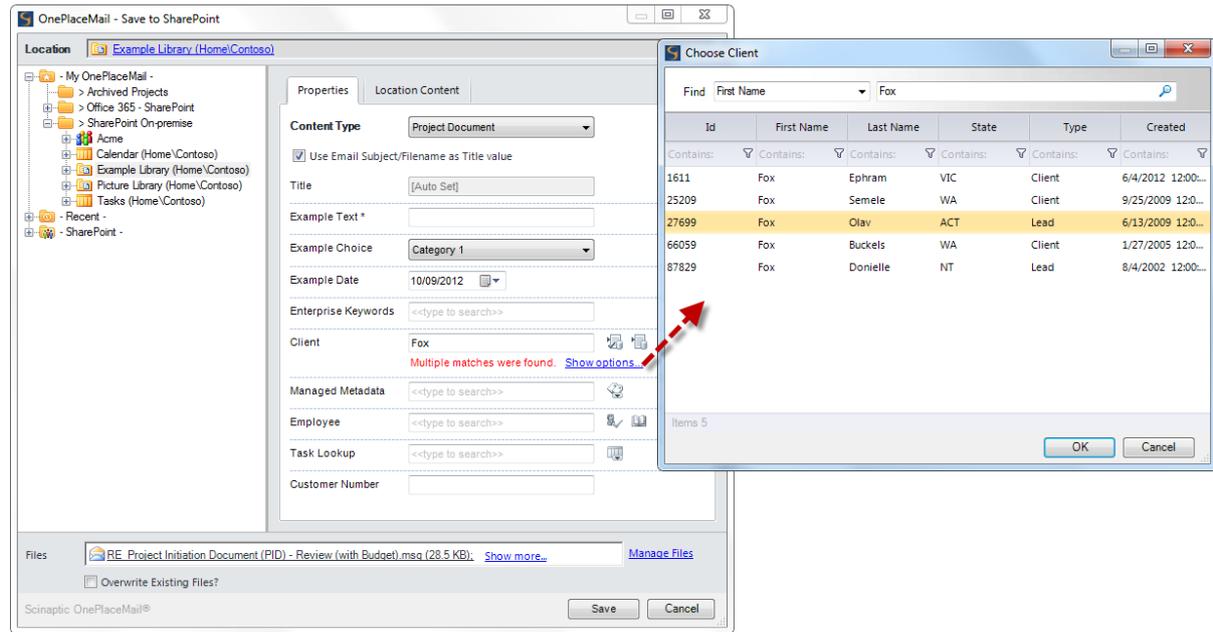
### Resolve and select from External System

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   

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

### Multiple Matches



The screenshot shows the OnePlaceMail interface with a 'Choose Client' dialog box open. The dialog box contains a search field with 'Fox' entered and a table of results. A red arrow points from the 'Show options...' link in the main interface to the dialog box.

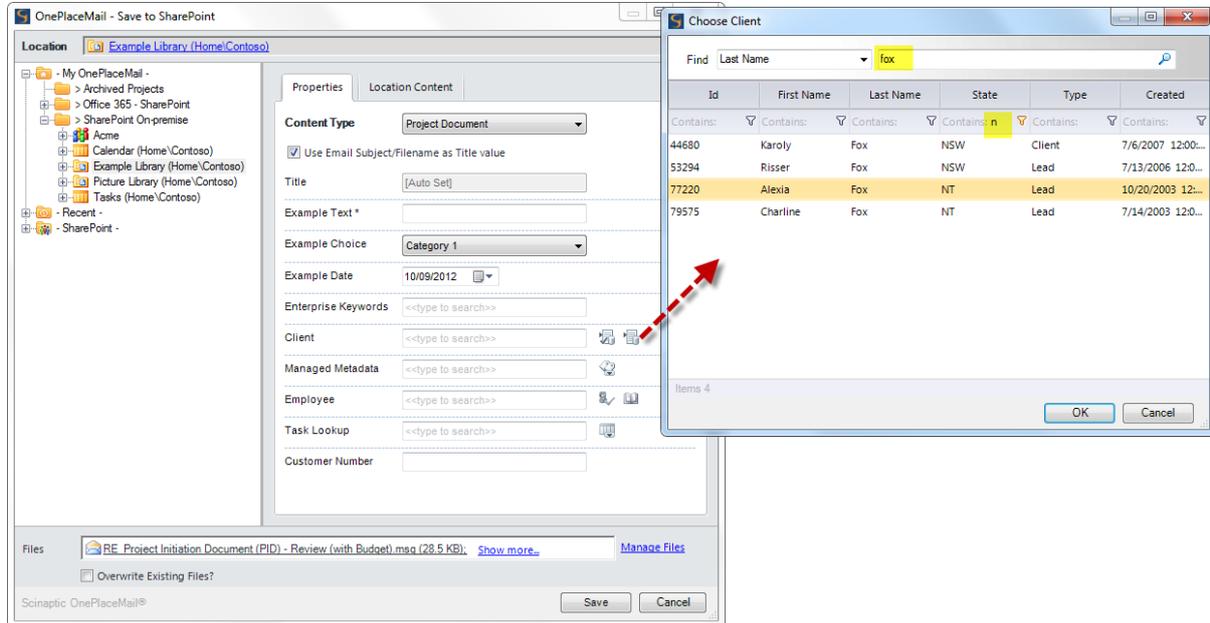
Id	First Name	Last Name	State	Type	Created
1611	Fox	Ephram	VIC	Client	6/4/2012 12:00...
25209	Fox	Semele	WA	Client	9/25/2009 12:0...
27699	Fox	Olav	ACT	Lead	6/13/2009 12:0...
66059	Fox	Buckels	WA	Client	1/27/2005 12:0...
87829	Fox	Donielle	NT	Lead	8/4/2002 12:00...

### 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.



### Search and Filter

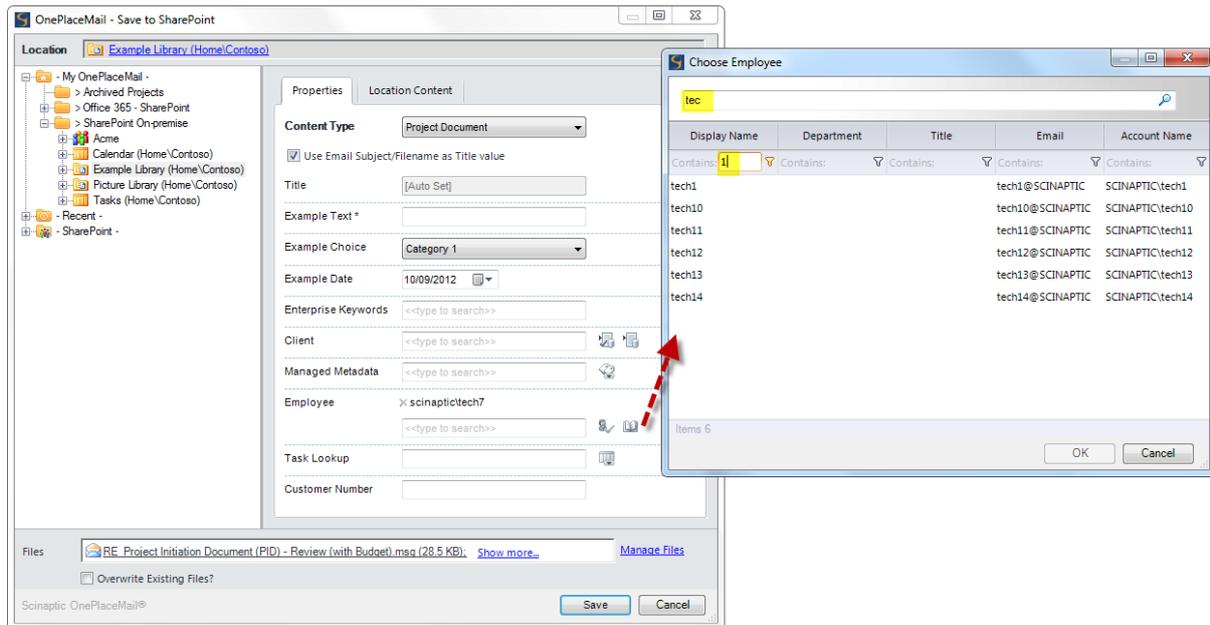
## People & Groups Column

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

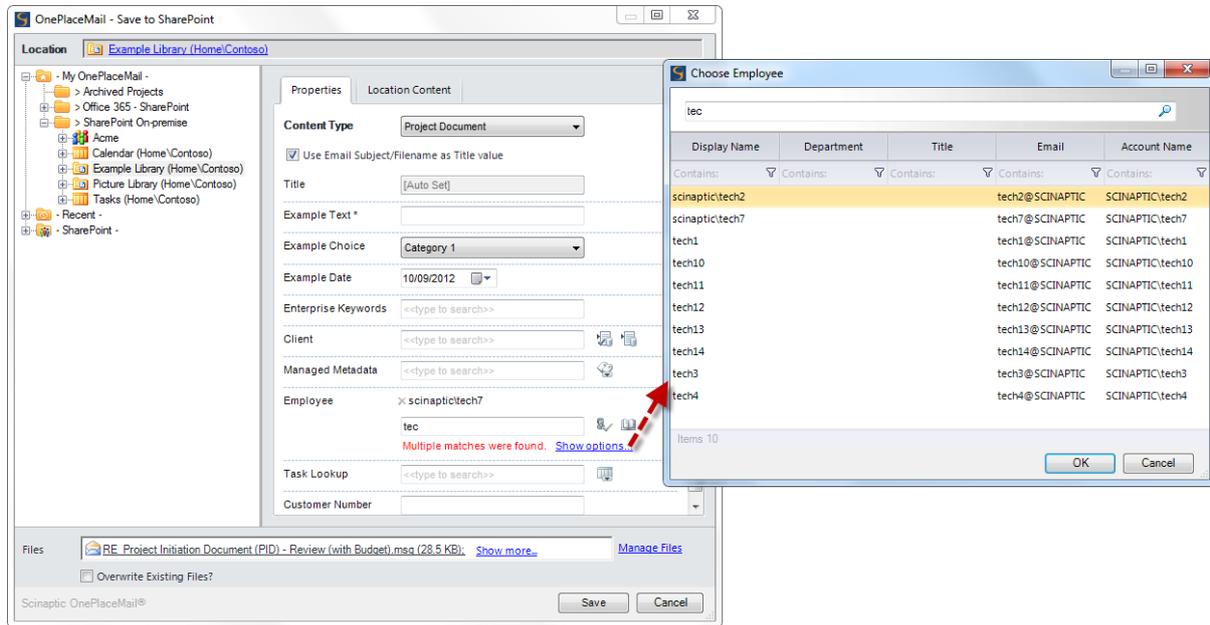
The People/Group selection via the pop-up picker interface allows you to Search for the relevant person/s and groups and also allows for subsequent sorting and further filtering of your results.



### 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.

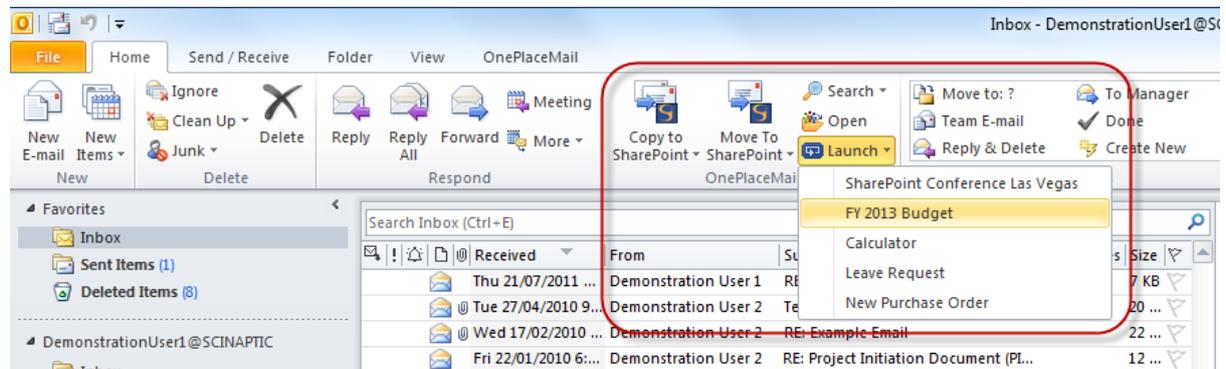


Resolve People / Group Entry

## 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



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.

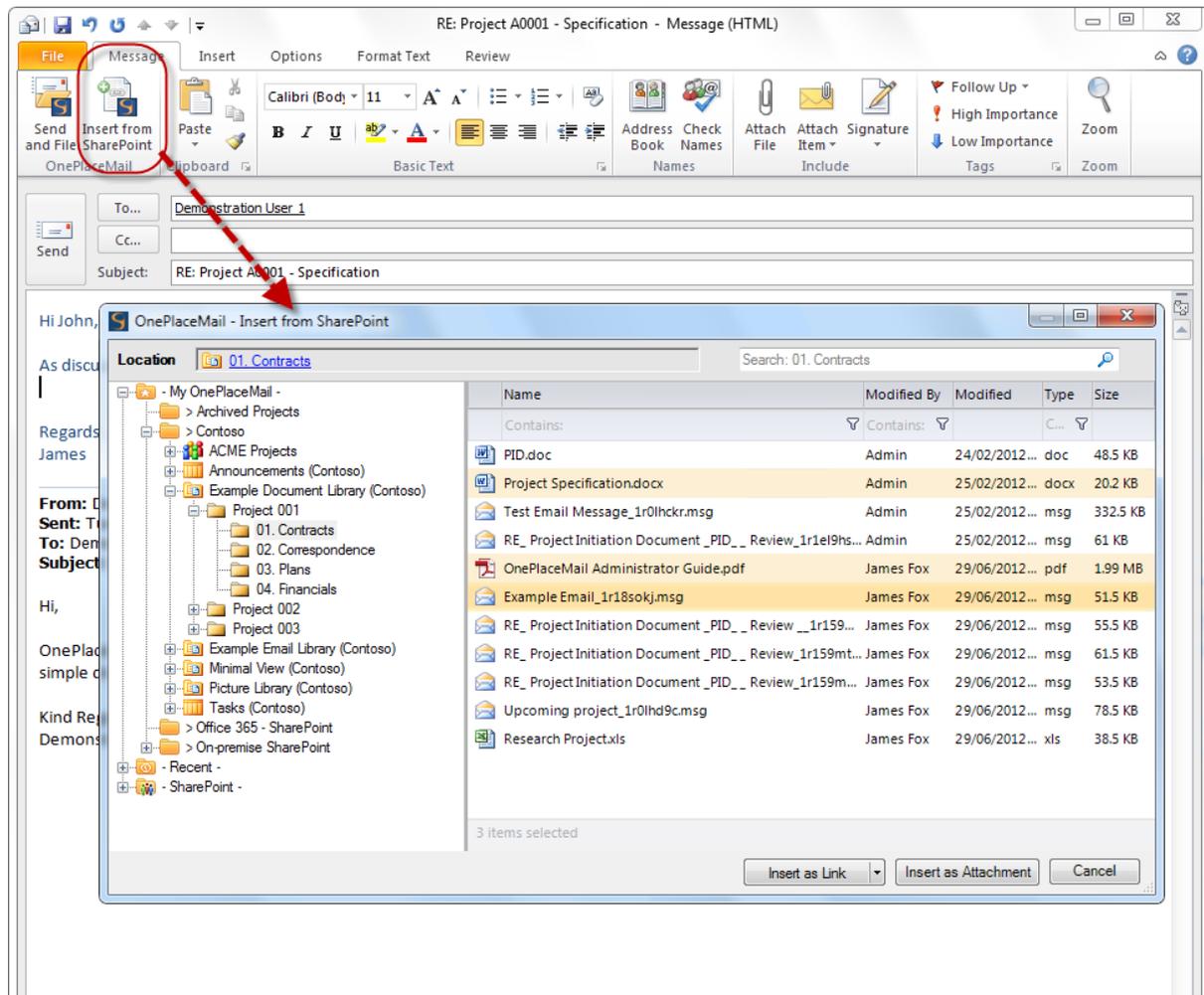
Seamless access to SharePoint content is provided by the new 'Insert from SharePoint' and 'Open from SharePoint' capability. Taking advantage of key SharePoint platform capabilities such as the Document ID feature, OnePlaceMail is making it easier to be productive and share content in a more effective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



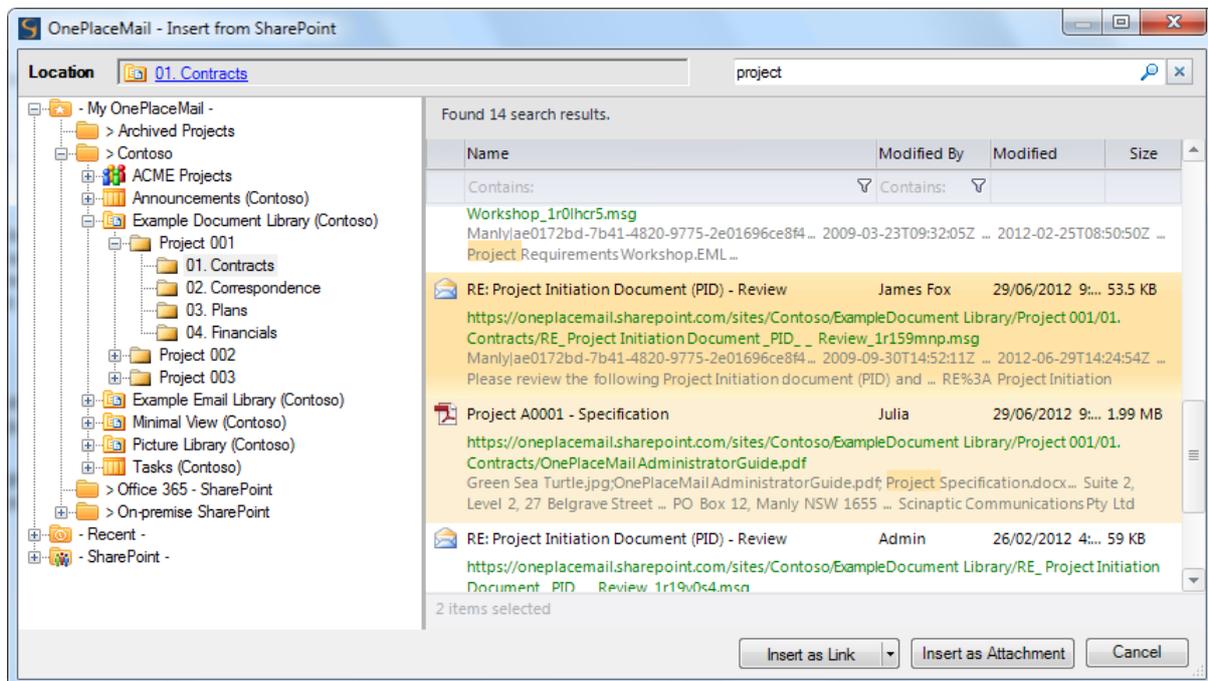
Insert from SharePoint (As links or attachments)

## 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

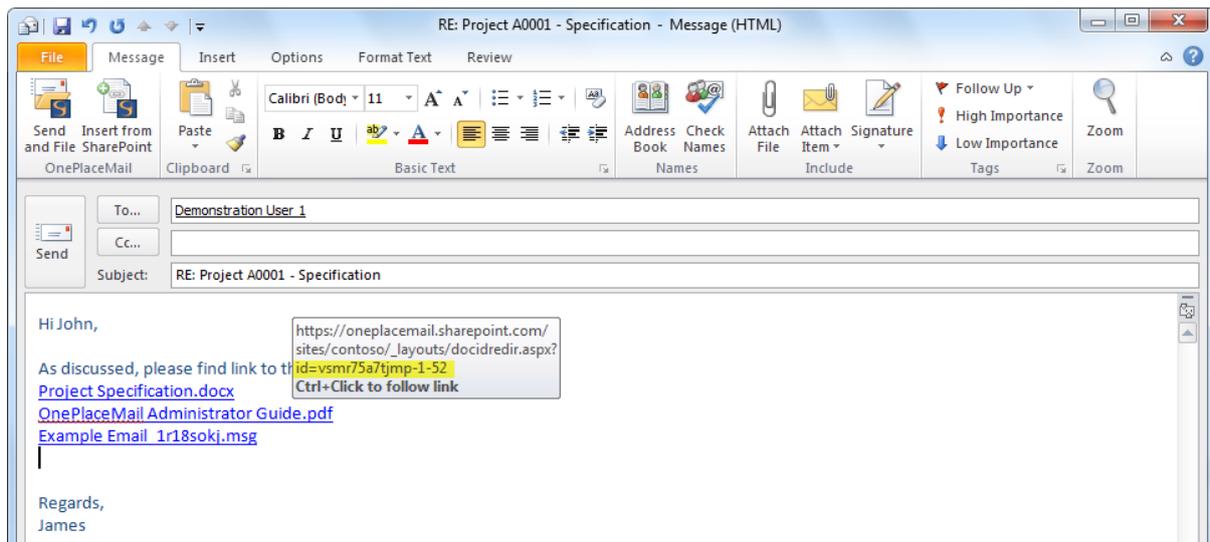
SharePoint search capabilities are provided from within the Insert from SharePoint window. Therefore, allowing you to search both SharePoint metadata and file content. OnePlaceMail provides hit highlighting on the Search results.



### 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.



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

**Support for Libraries and lists**

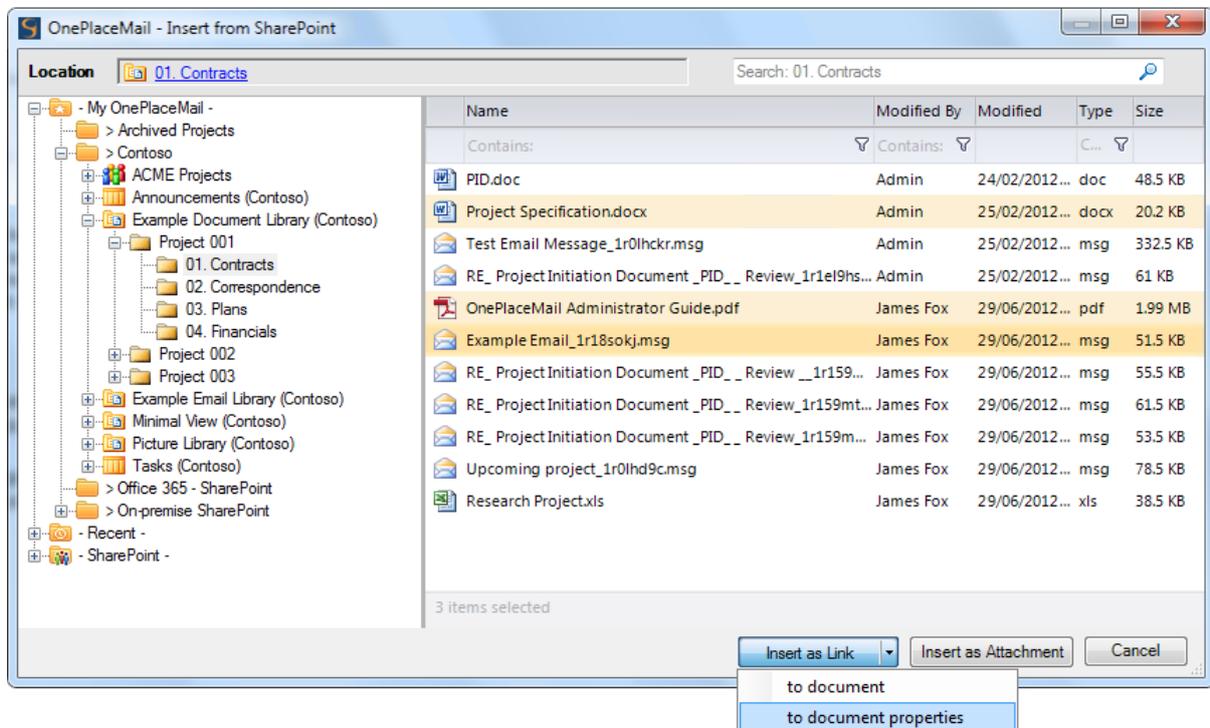
OnePlaceMail supports linking to items within a SharePoint Library (Document or Picture Library) or a SharePoint List (e.g. Event, Task, Issue, Custom list, etc...)

**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**

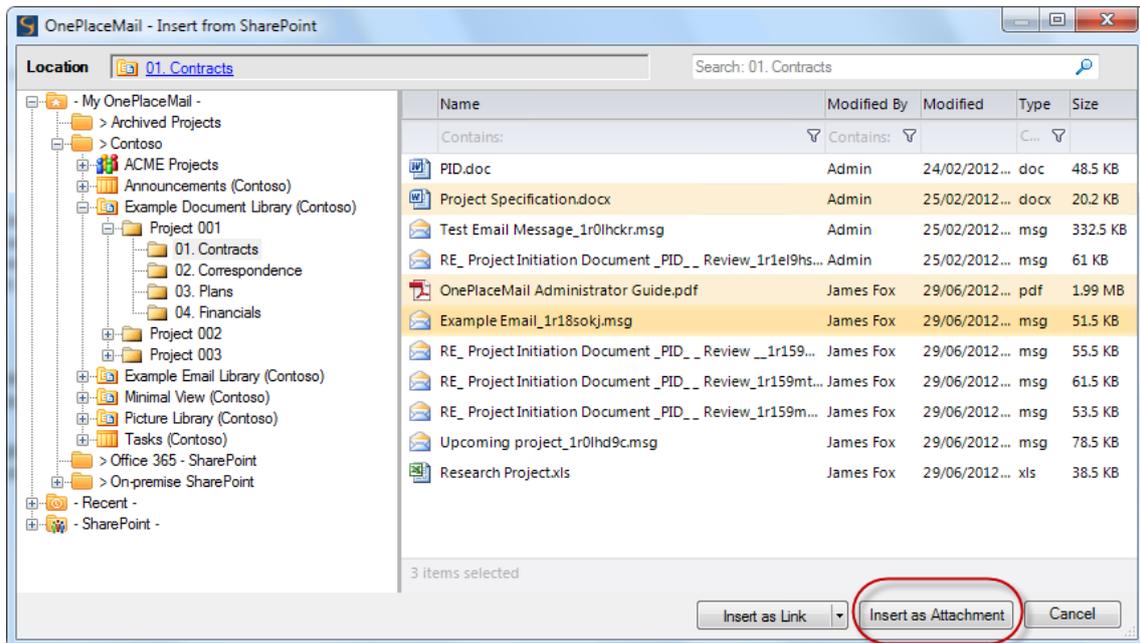
Insert Links to an Item Properties (view/display) for items within a SharePoint document library or list.



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

### Insert as attachment

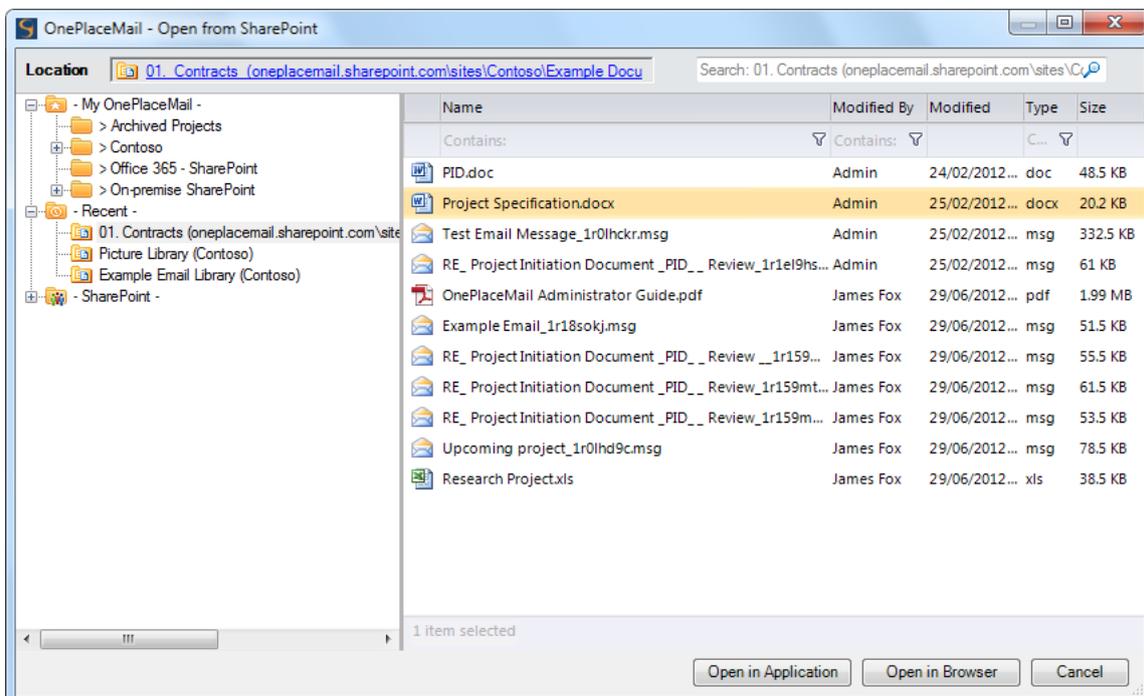
When sending files to external recipients, OnePlaceMail provides the ability to insert file attachments. The Insert file attachments button is provided in the Enterprise edition of OnePlaceMail.



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.



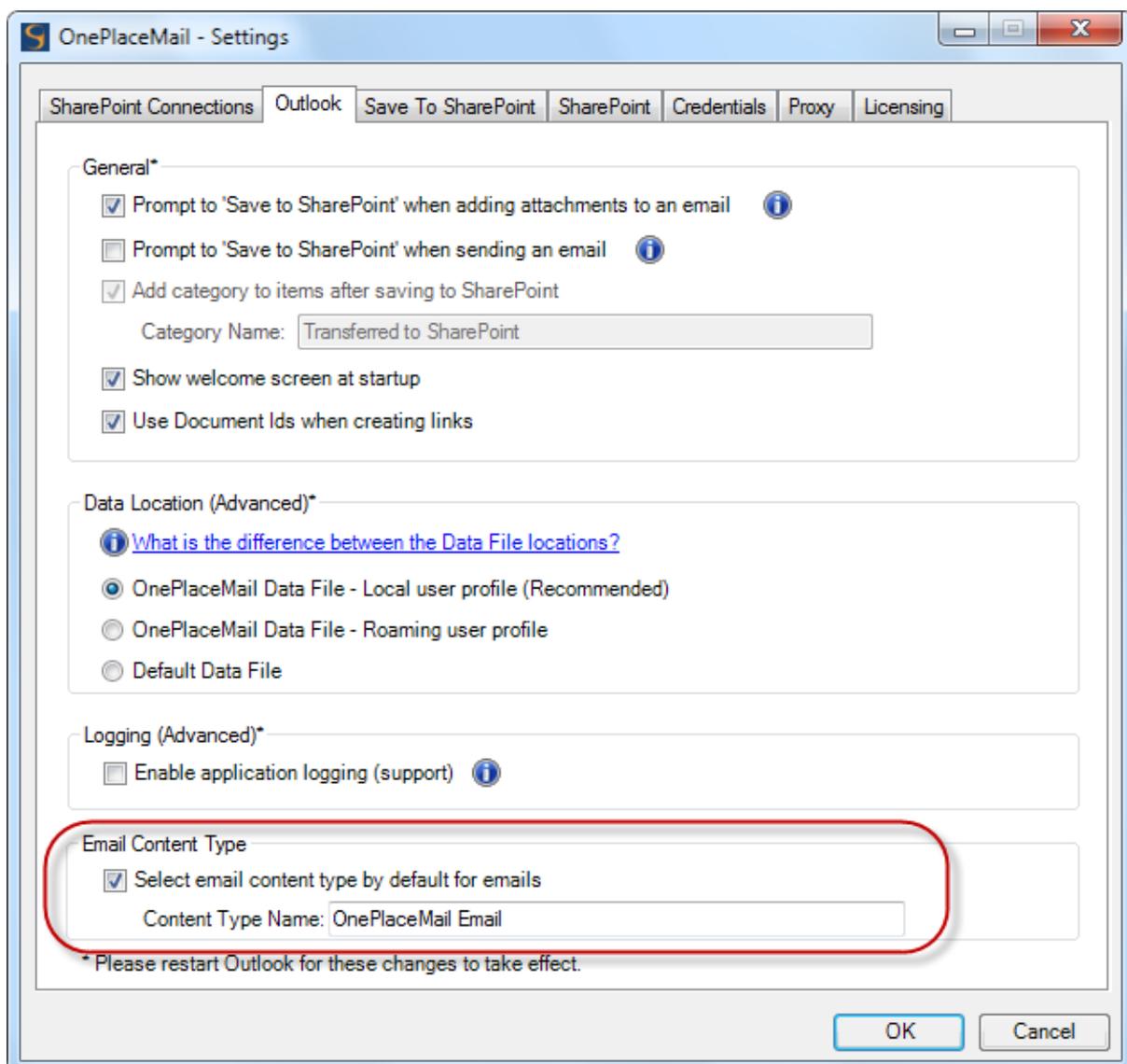
## Open Documents from SharePoint in Application or Browser

## 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**



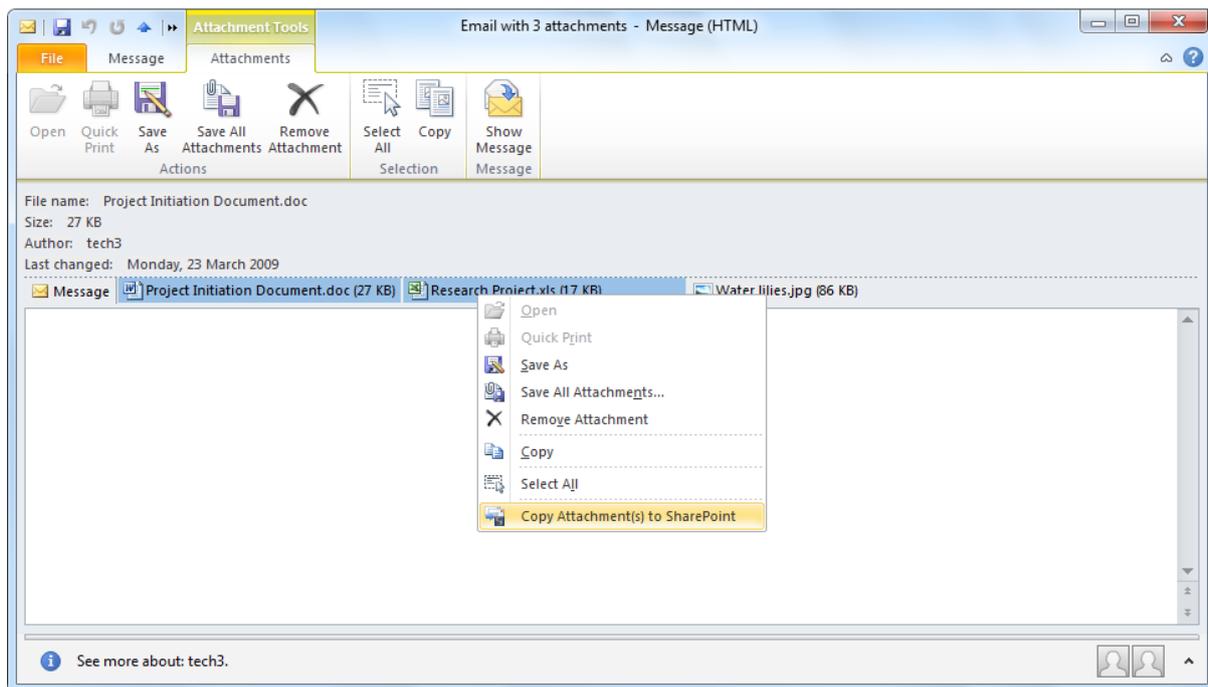
## Streamline saving emails or other document types to SharePoint (Smart filing)

## 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.



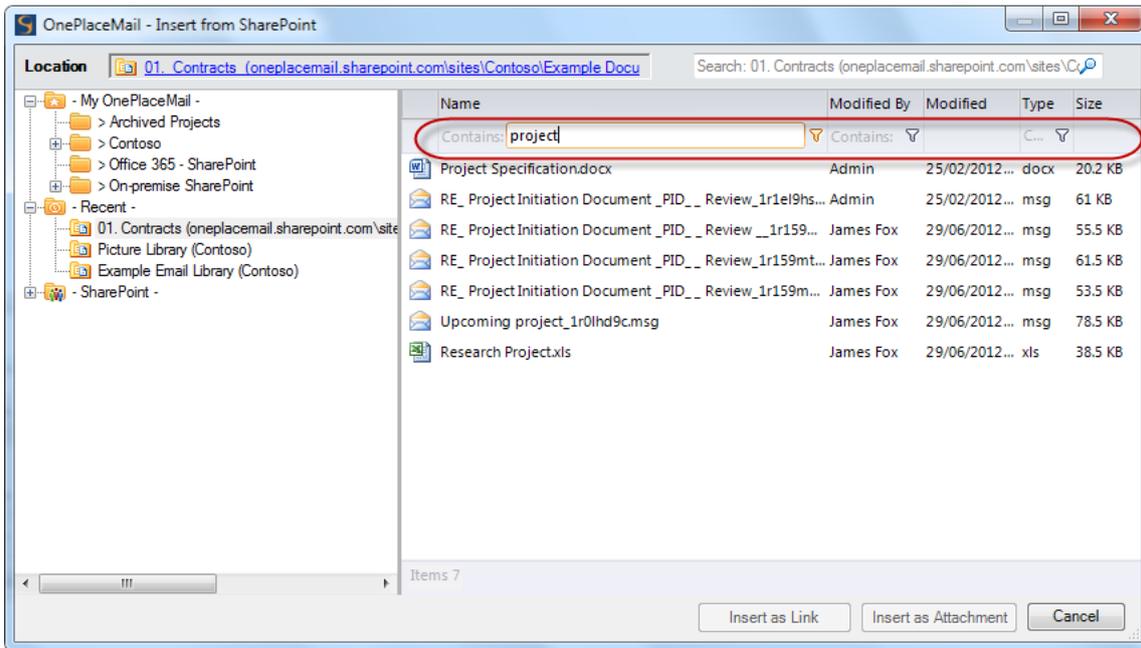
Right-Click Copy Attachments to SharePoint

## 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

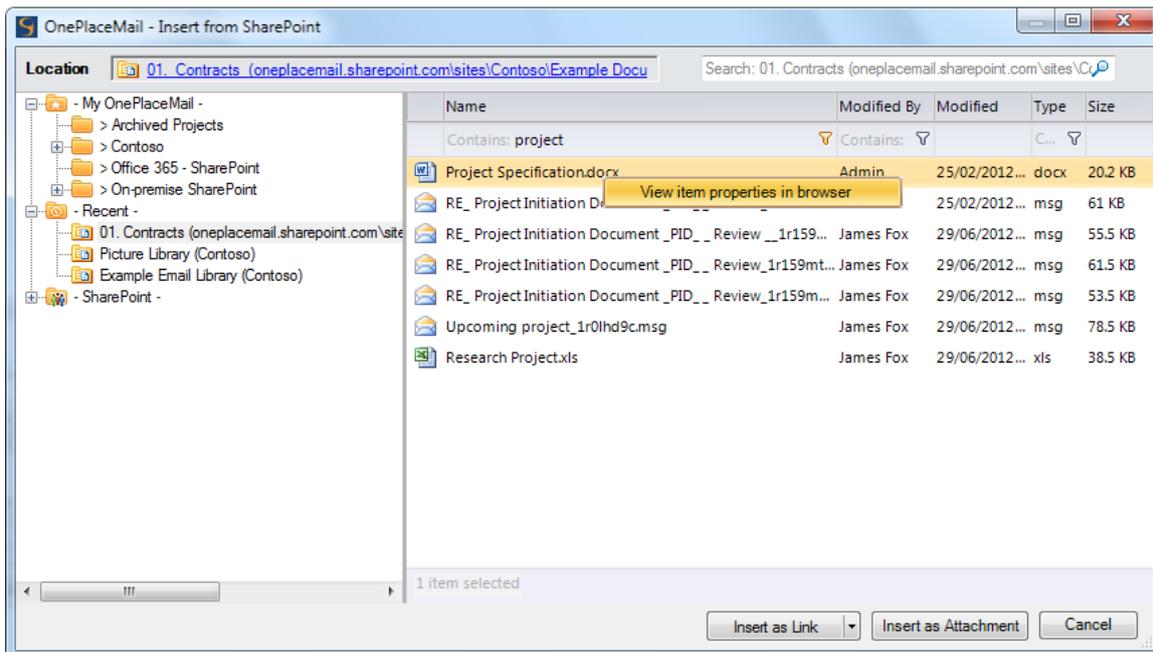
Advanced filtering and sorting capabilities when browsing or searching are provided to help locate relevant items.



### Filter or Sort Content

### Opening properties

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

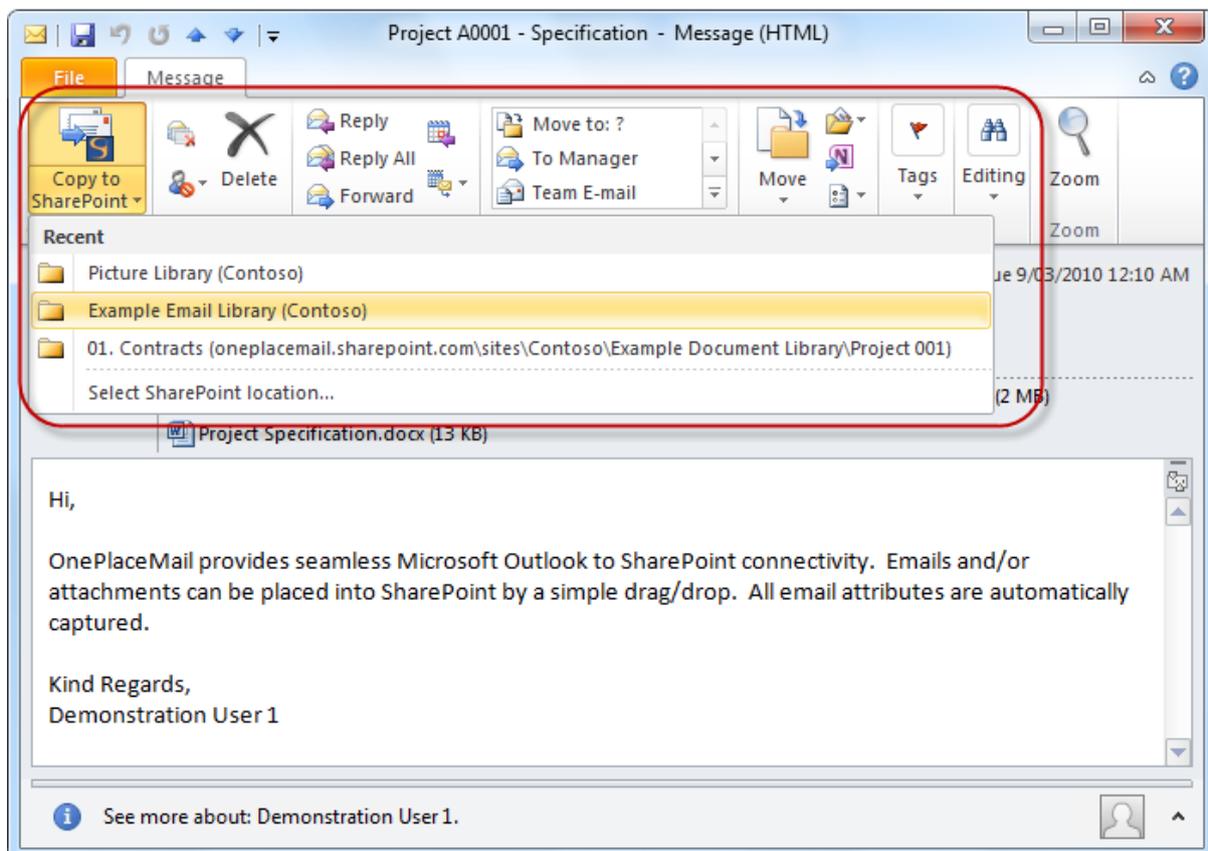


## View Item Properties in browser

## 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.



## 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.

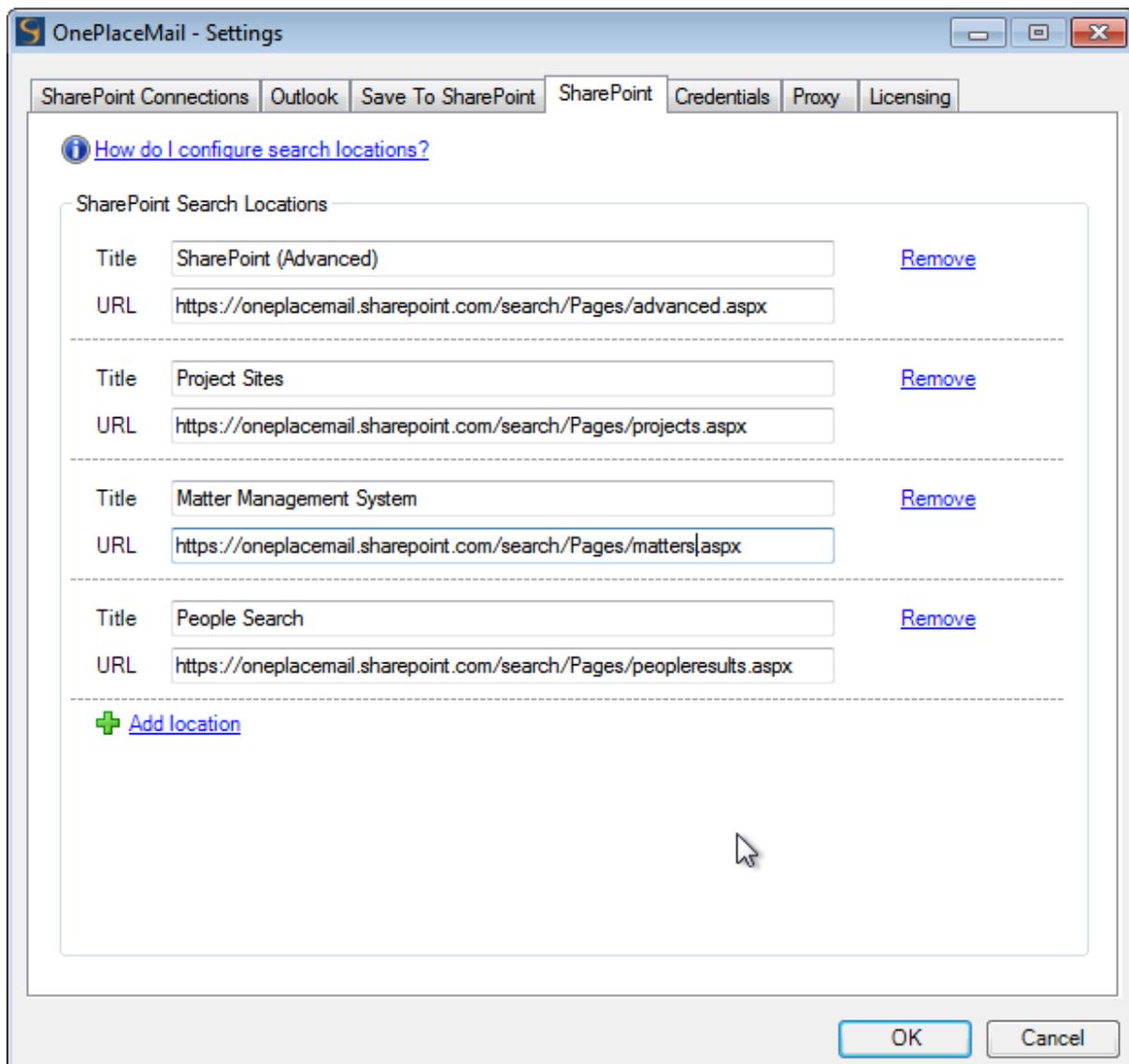
- The power of SharePoint/FAST Search, including any customisations is made available from your desktop applications such as Microsoft Outlook.
- Accessing and saving to recent locations is made possible with the new Recent Locations on the left navigation of Outlook and Save to SharePoint window.

## 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 3<sup>rd</sup> Party search solutions and capabilities for user from within Microsoft Outlook.

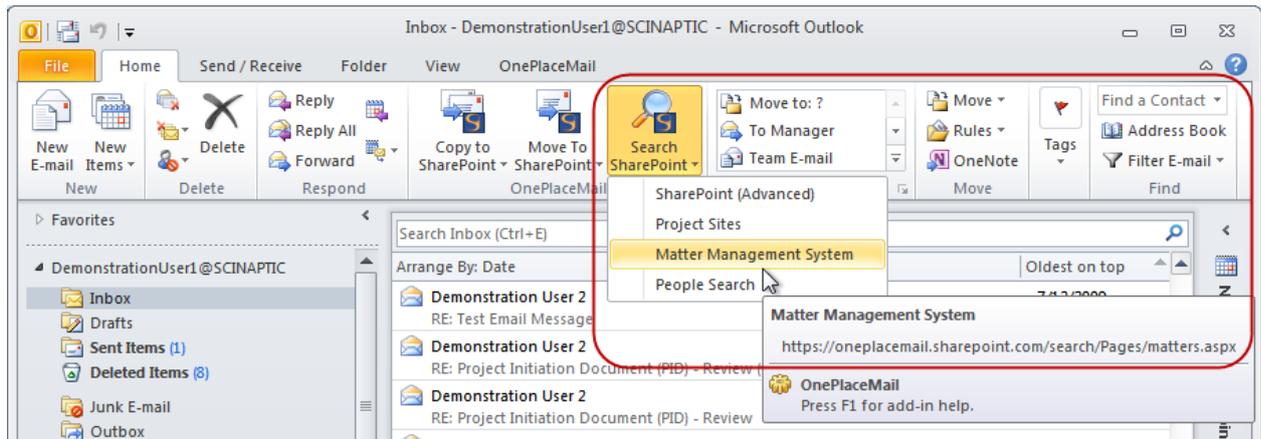
OnePlaceMail R6.1 provides the ability to define one or more search locations/scopes and therefore allows the user to locate content within the SharePoint platform in an efficient manner.

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).

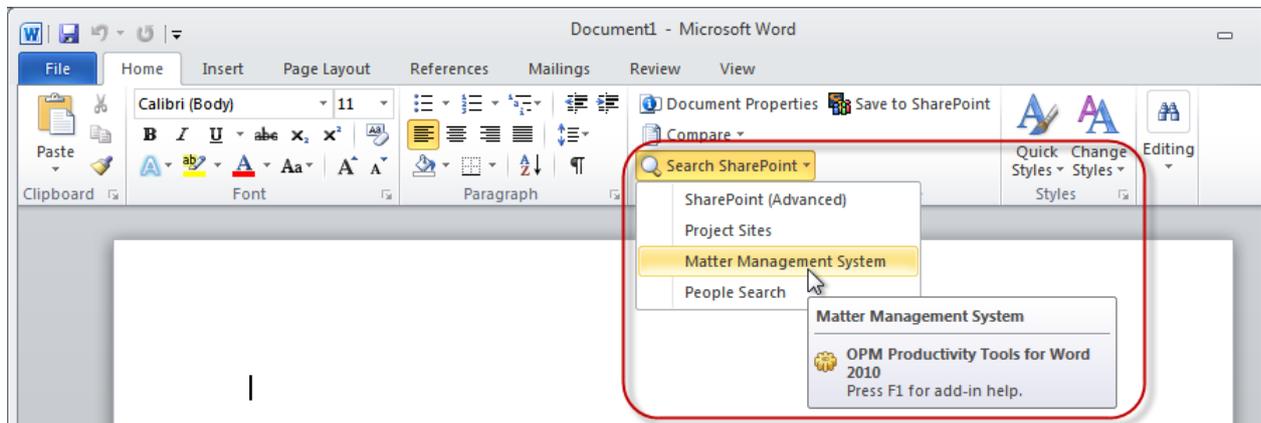


Define one or more Search Locations/scopes

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

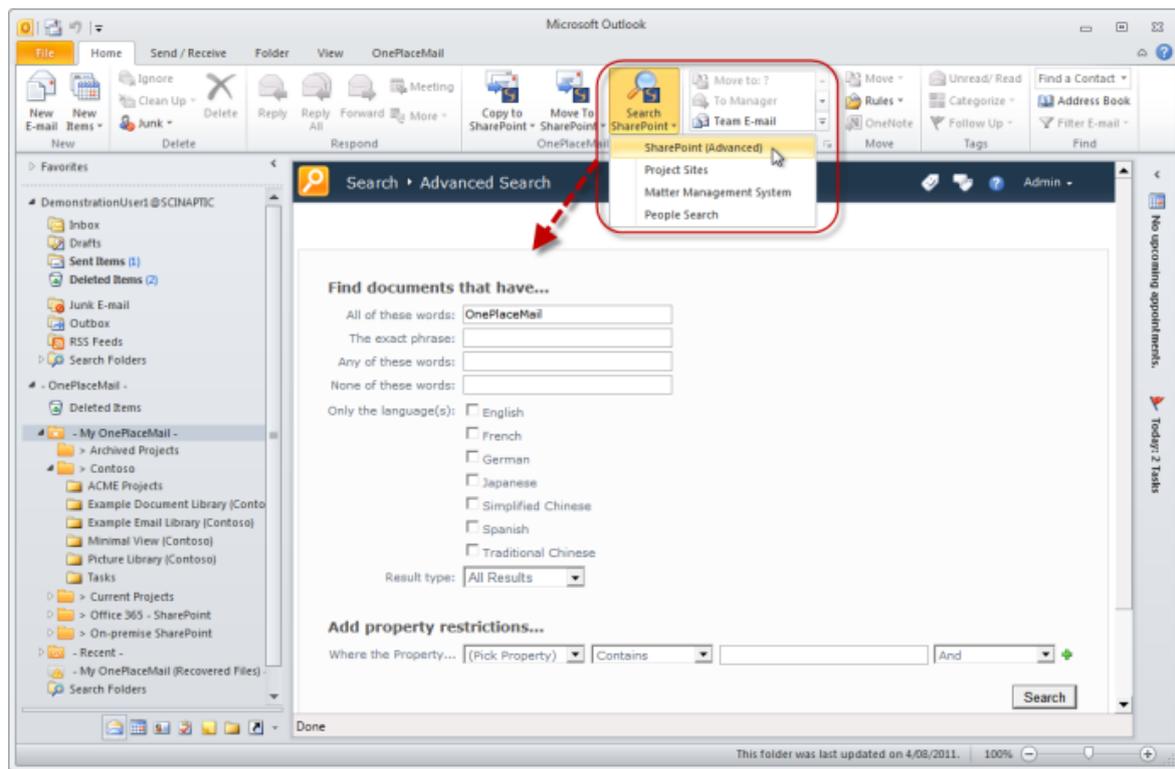


Search Locations from within Microsoft Outlook



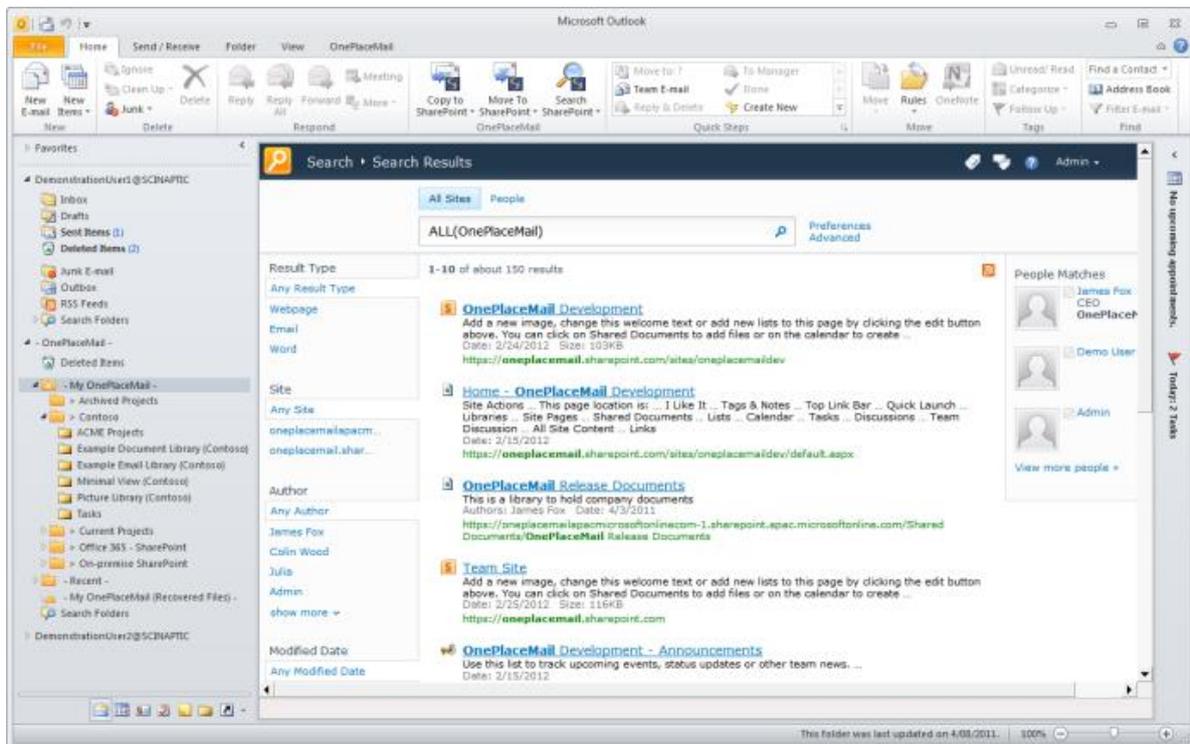
Search Locations from within Microsoft Word (Excel and PowerPoint)

The rich SharePoint Search capabilities are available within Microsoft Outlook.



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

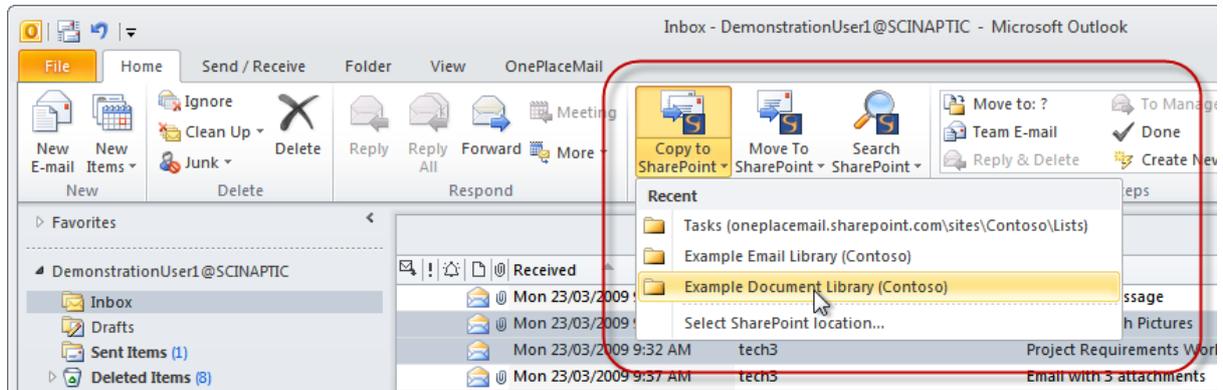
The Search Results are display with the full capabilities provided by SharePoint Search, Fast or other implemented search technology.



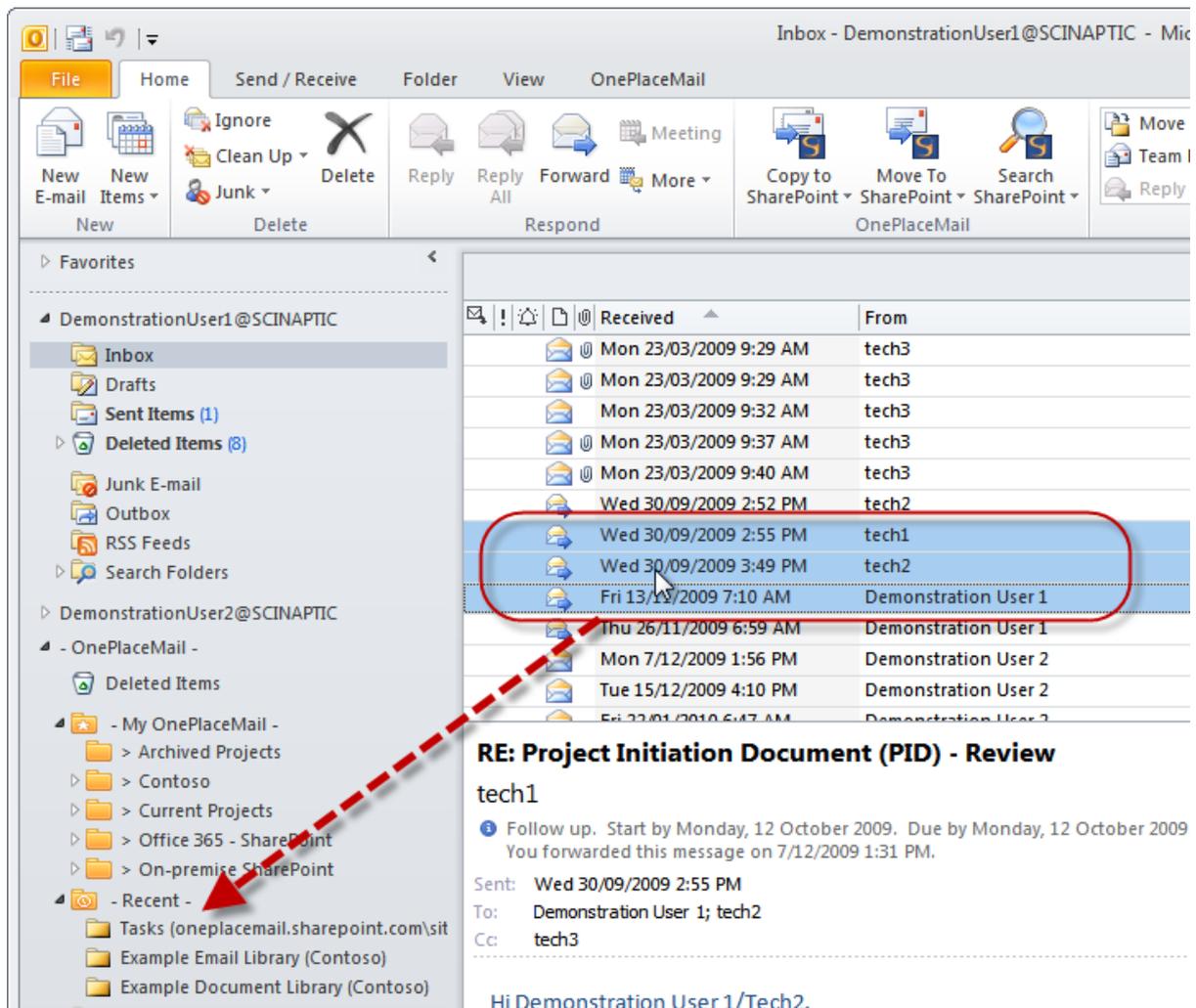
The search results

## 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.

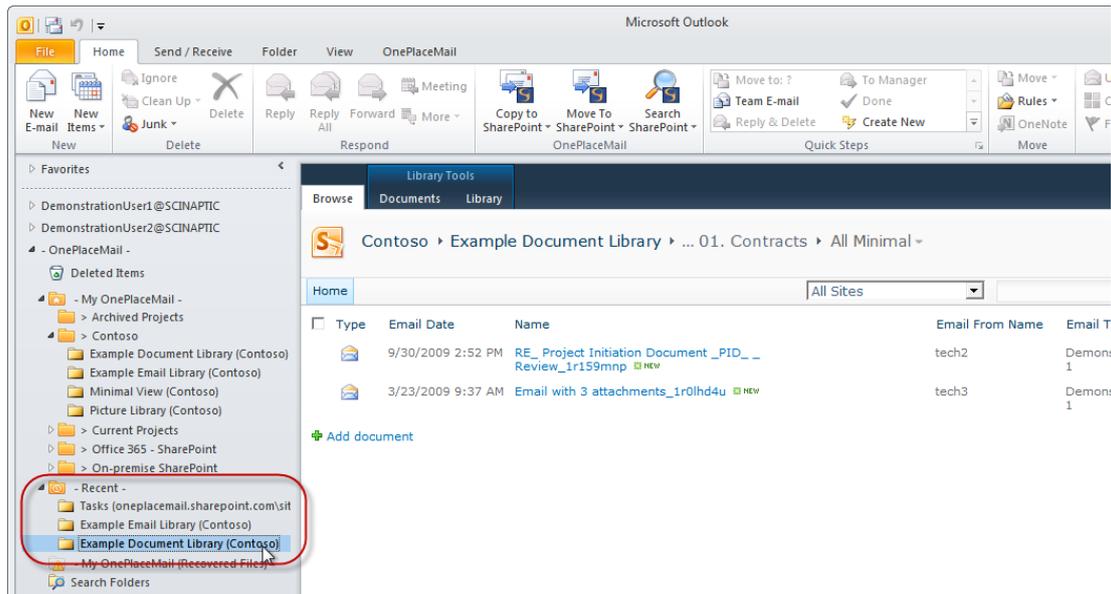


Recent Locations under the 'Copy To' / 'Move To' buttons within Outlook



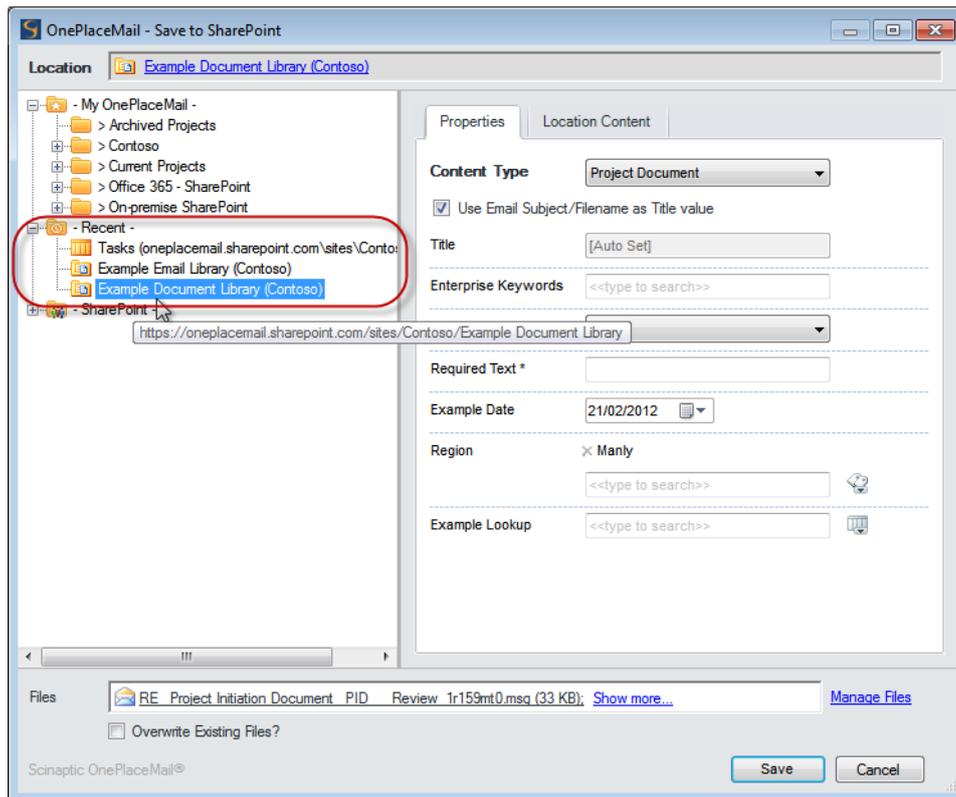
Drag / Drop to Recent Locations

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)



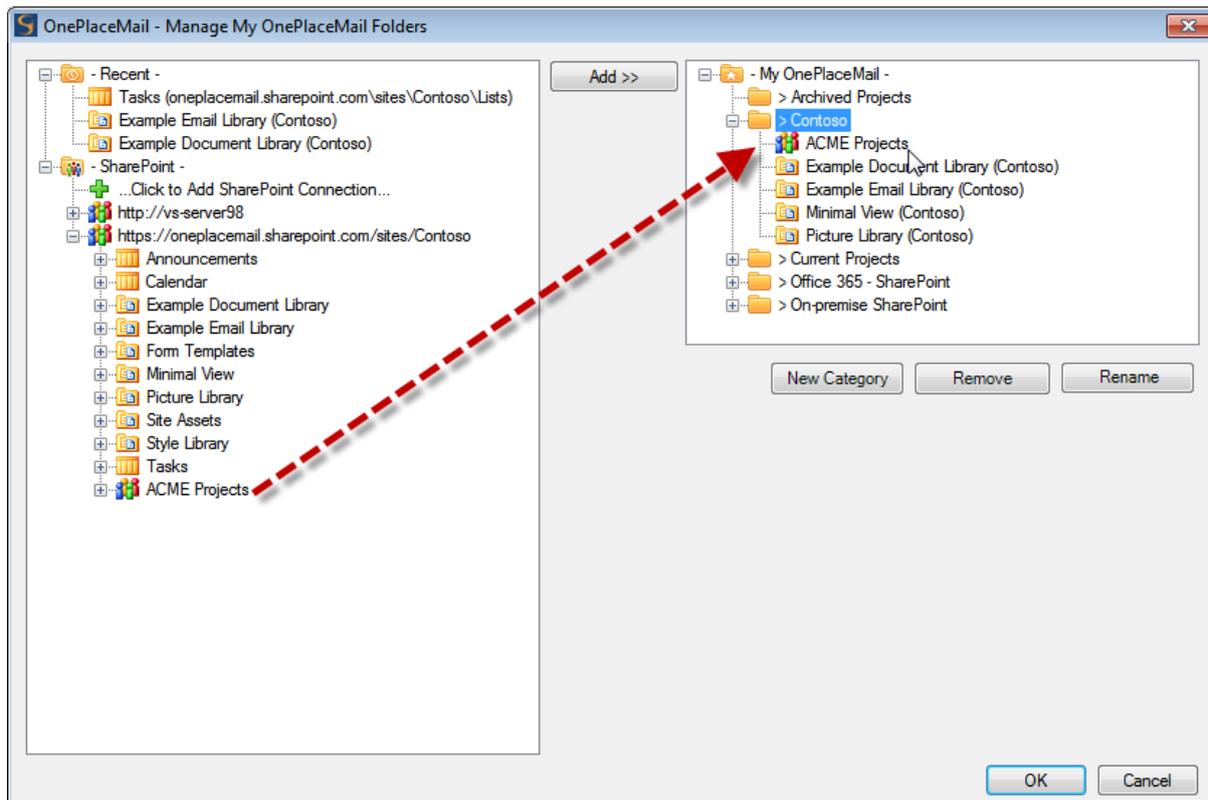
Save to a Recent Location

## Site Locations

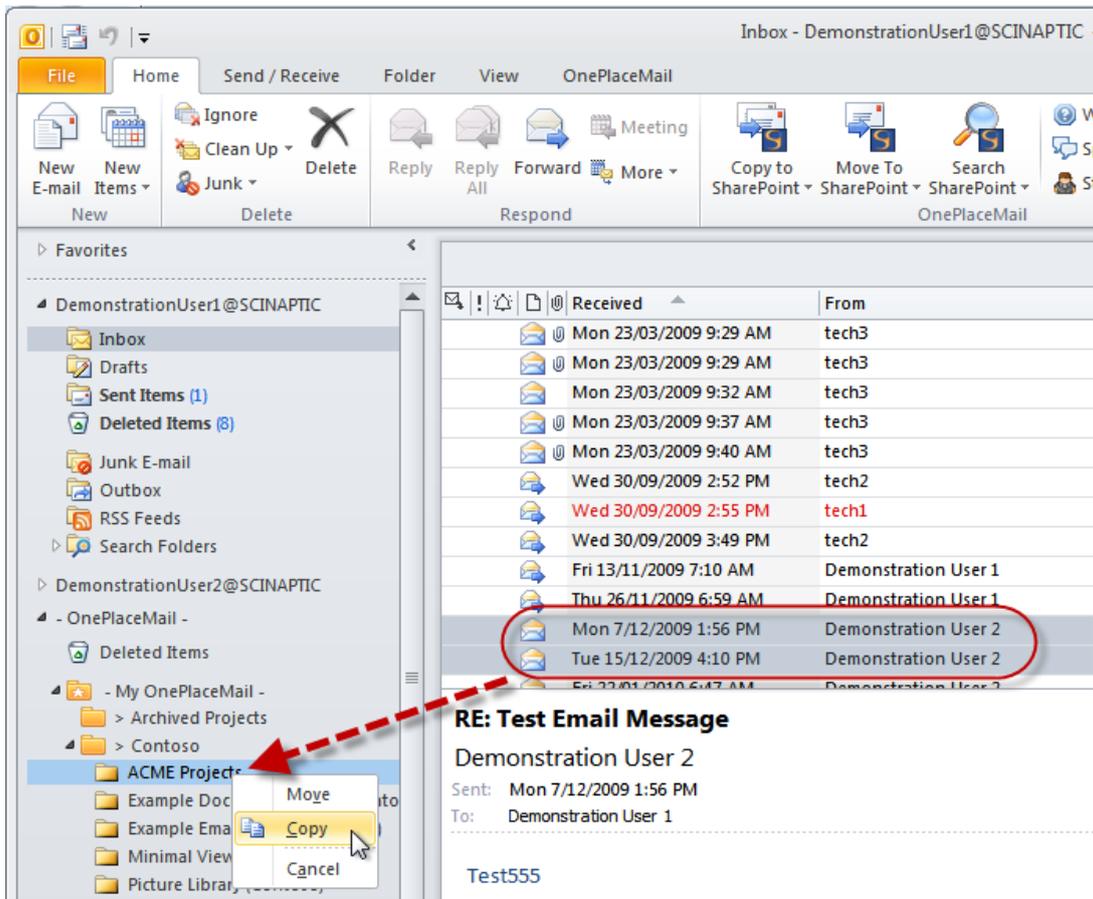
OnePlaceMail provides the ability for a user to simplify their view of SharePoint by conveniently selecting one or more SharePoint locations (Libraries, Lists, Folders and Document Sets) and adding these locations into a 'virtual' structure on the left navigation of Outlook.

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.

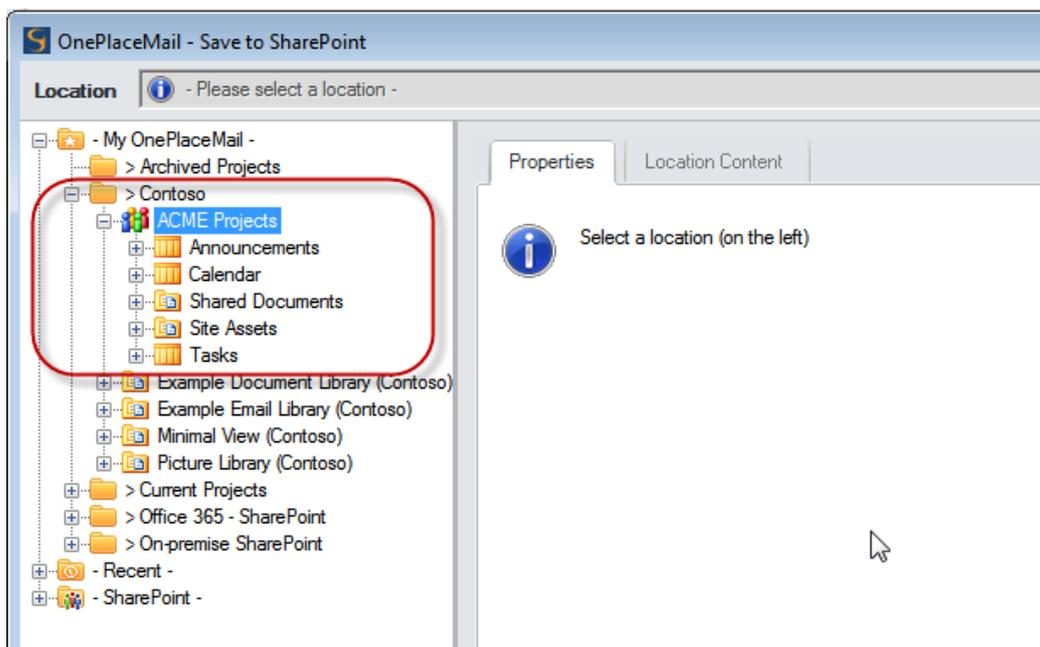


The SharePoint Sites appear on the left navigation of Outlook



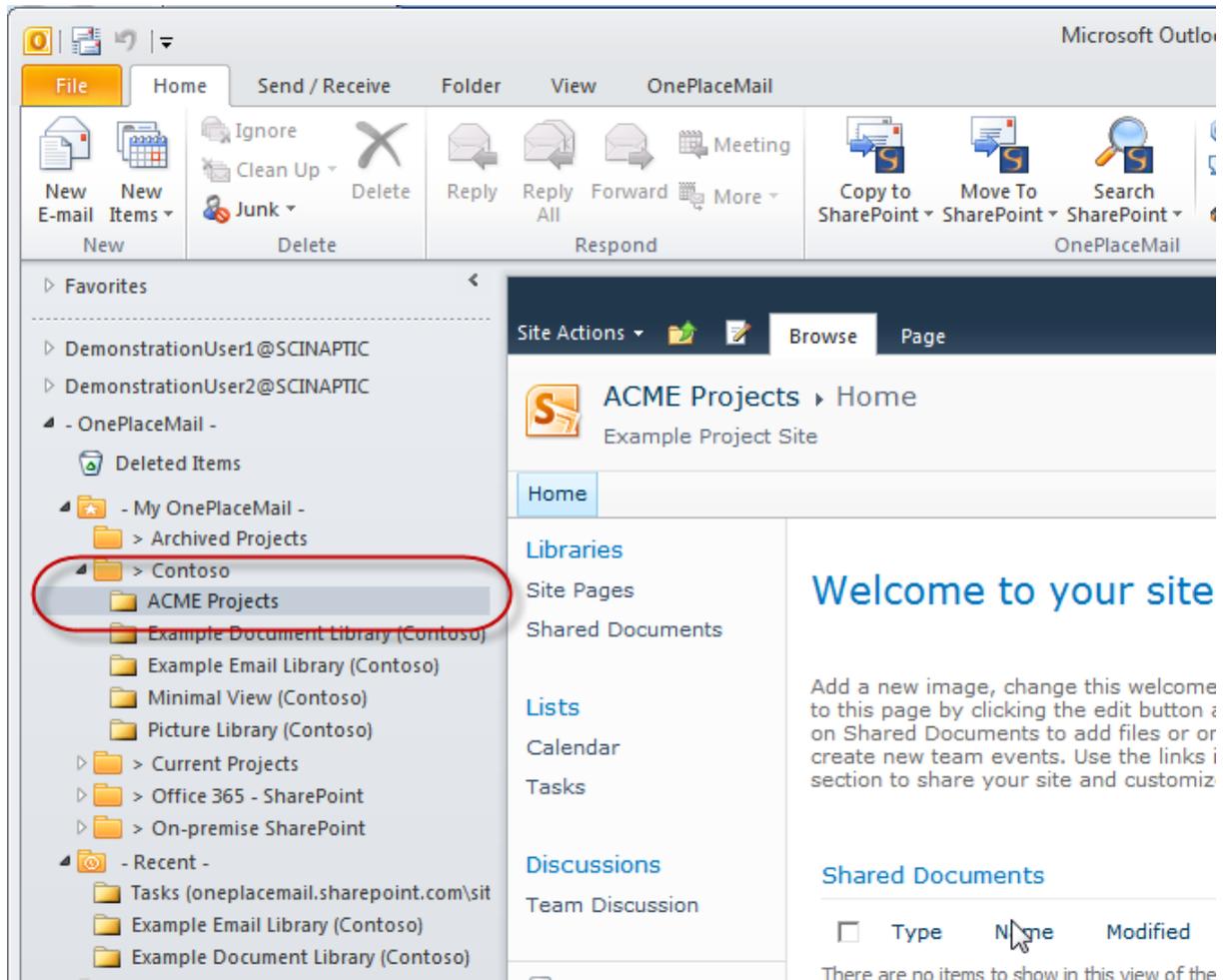
**Drag & drop emails or attachment to a SharePoint site.**

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.



New Items in Term Store

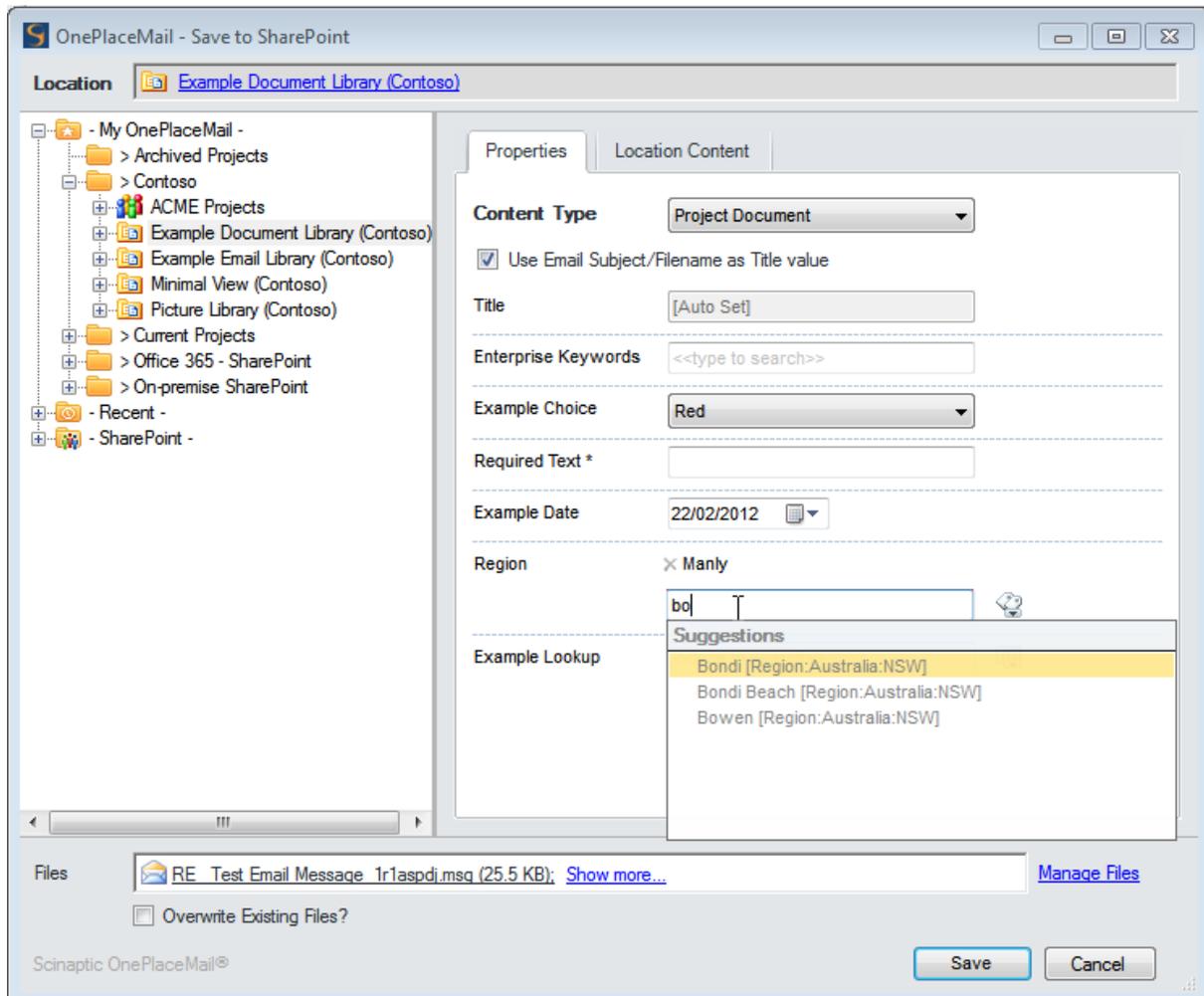
SharePoint Sites can be conveniently accessed from within Outlook.



Access a SharePoint Site from within Outlook

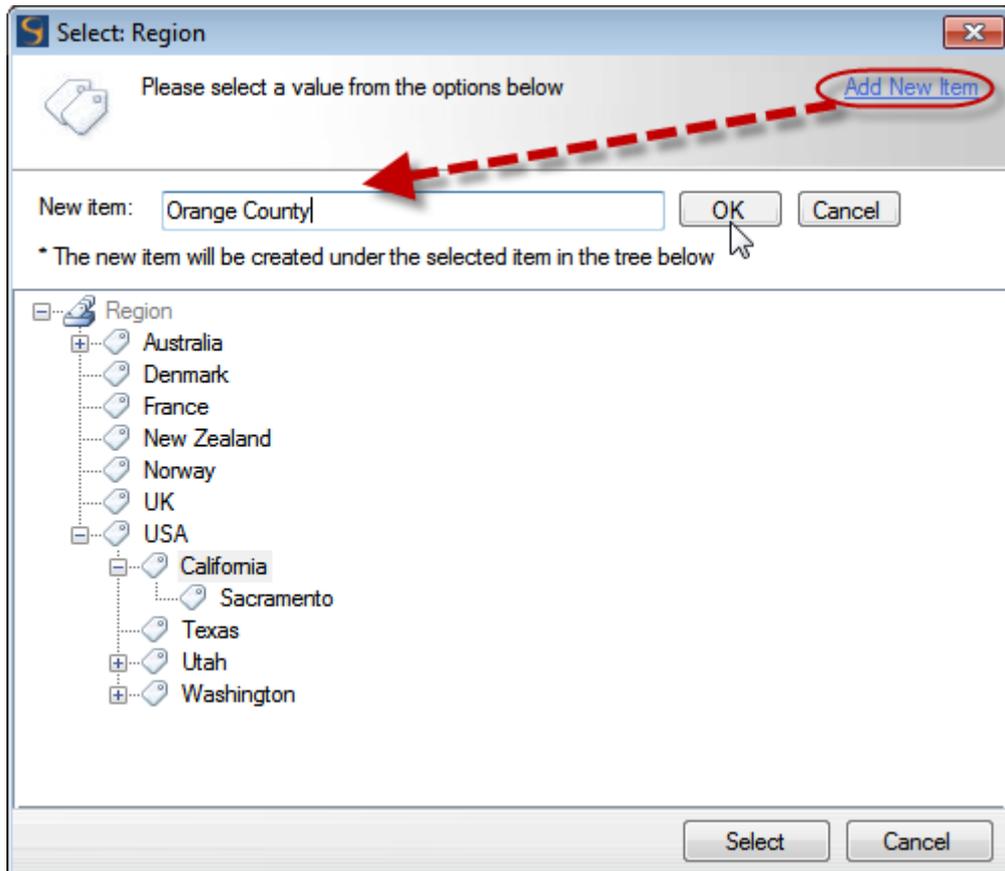
## Managed Metadata / Enterprise Keywords / Taxonomy

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.



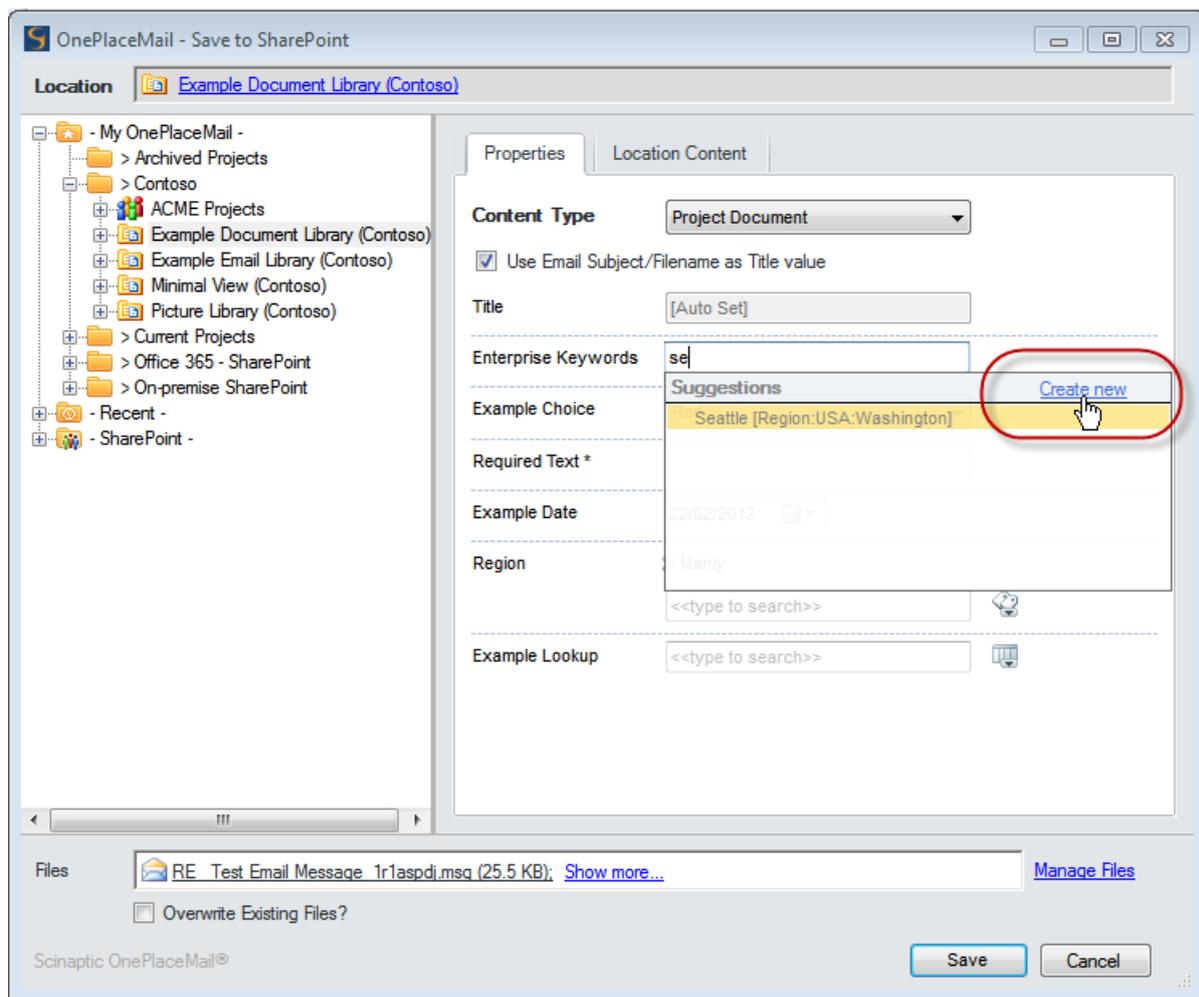
### Managed Metadata – Full type-ahead

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.



New Items in Term Store

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



### 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
5. 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.