



# PageLight

## Administrator Guide

## Table of Content

<b>1. DOCUMENT PURPOSE</b>	<b>2</b>
<b>2. SYSTEM REQUIREMENTS</b>	<b>2</b>
<b>3. INSTALLING PageLight</b>	<b>3</b>
<b>4 CENTRAL CLIENT CONFIGURATION</b>	<b>11</b>
4.1 Client Configuration Overview	11
4.1.1 The Configuration Update Process	11
4.2 Updating Client Configuration Settings	12
4.2.1 How to Apply Client Configuration Updates	12
4.2.2 Updating a pageLightConfiguration.xml File	13
4.2.3 Managing Site Collections (Settings/Site Collections Tab)	14
4.2.4 Enable 'Save to SharePoint' Prompt-Add Attachment to Email in Global Setting	16
4.2.5 Enabling 'Save to SharePoint' Prompt when Sending an Email in Global Setting	17
4.2.6 Customizing the Outlook Category Assignment when Email is transferred	17
4.2.7 Global Settings (Settings/Preferences Tab)	18
4.2.8 Meta Data - Default Column Mapping	20
4.2.9 Meta Data Setting	21
4.2.10 Capture the Email Body as Column Meta-Data – Emails	23
4.2.11 Managing My PageLightMail Folders	24
4.2.12 Customizing PageLightMail Menu, Toolbar Items, Send & File Button – Outlook	26
4.2.13 Customizing the Email Filename Format	30
4.2.14 Capture the Email Body as Column Meta-Data – Attachments	30
4.2.15 Customizing the My PageLightMail Folder Name and Homepage	31
4.2.16 Illegal Character Stripping from Filenames	32

# 1. DOCUMENT PURPOSE

This guide provides instructions for advanced implementation options of PageLight. The following topics are covered:

- ❖ Installing PageLight
- ❖ Installing SharePoint Server Components
- ❖ Central configuration of PageLight clients
- ❖ Uninstalling PageLight

## You can skip to read this document, if you have the following environment

- a) PageLight used with default settings
- b) Centralized management settings of PageLight not required
- c) BCS files not used in SharePoint 2010 environment

# 2. SYSTEM REQUIREMENTS

## Supported environments

### SharePoint Environments Supported

SharePoint 2010

SharePoint 2013

### Outlook Clients Supported

Outlook 2010 (32 and 64 bit)

Outlook 2013 (32 and 64 bit)

### Operating Systems Supported

Windows 2008 and Windows Server 2008 R2 (64 bit only)

Microsoft Windows XP (32 bit only)

### 3. INSTALLING PageLight

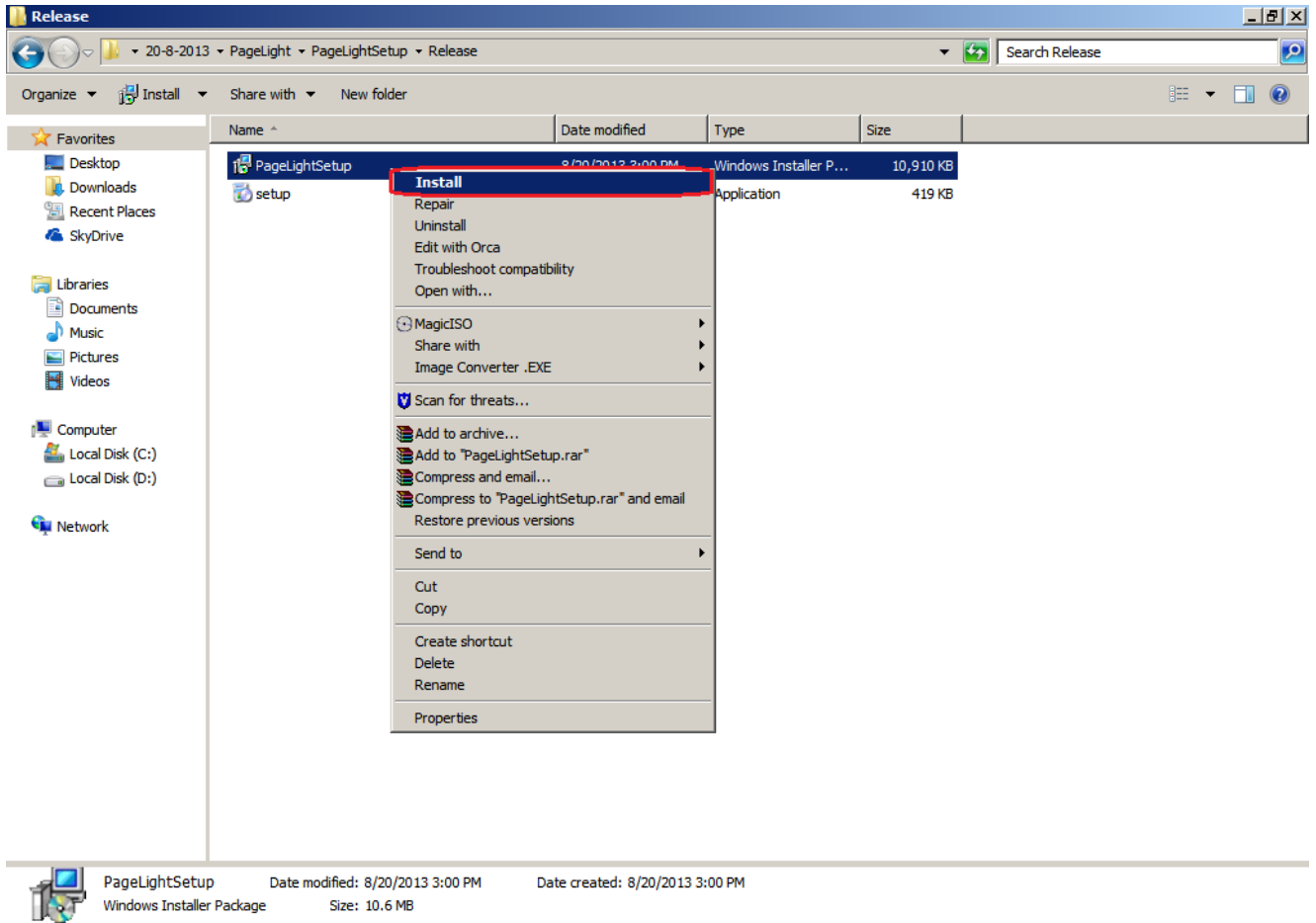
The following procedure explains how to install PageLight on a single client workstation. Before beginning the installation procedure, make sure that all other programs are closed and disable any anti-virus software.

#### **PageLight CLIENT INSTALLATION**

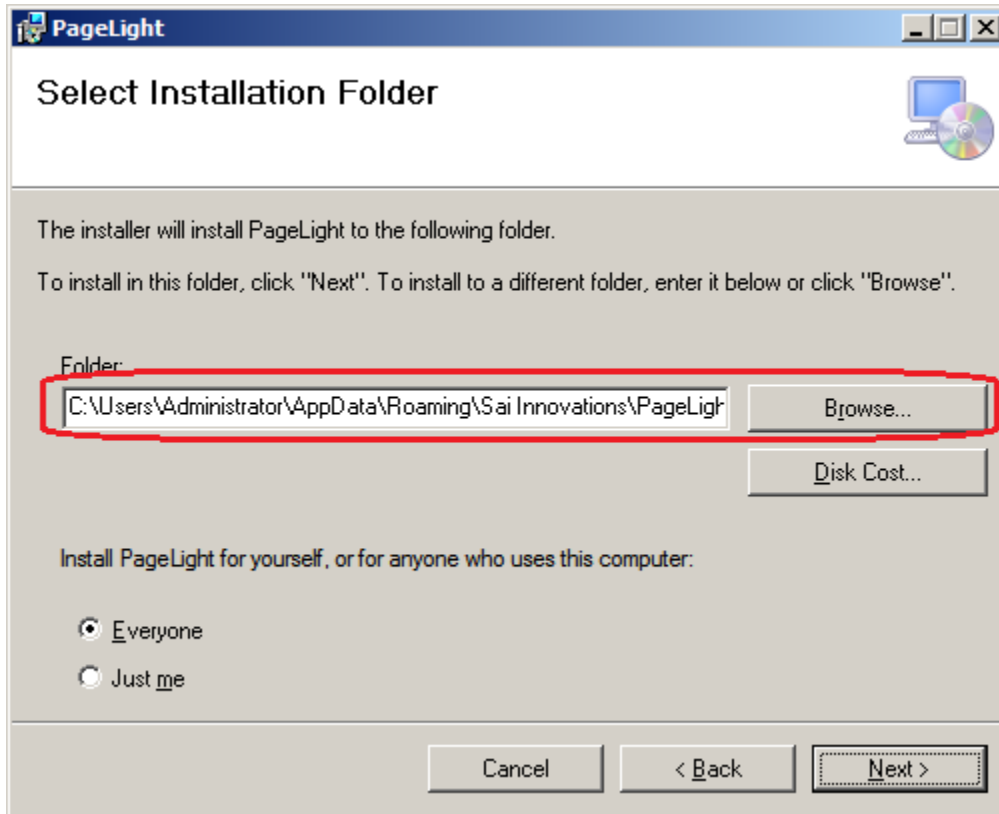
1. Download PageLight directly from the Sai website <http://www.sai-innovations.com> and unzip the installation media to a Local directory.
2. The PageLight software can be deployed manually to specific machines
3. The PageLight is a Microsoft Outlook add-in which is installed by running the setup.exe program file provided in your download package.

## INSTALLATION PROCEDURE

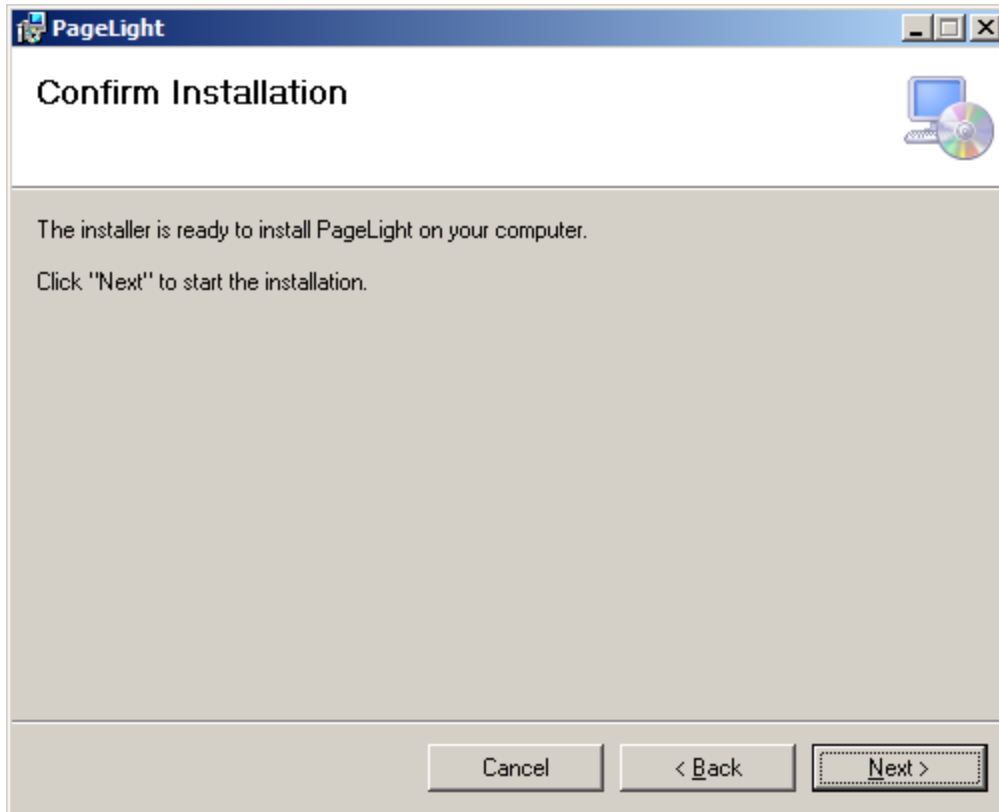
1. Login to client machine as an administrator.
2. Close all running applications including Microsoft Outlook if it is currently open.
3. Run setup.exe from the PageLight installation media.



4. Select an installation path or retain the suggested default path. Install for everyone if more than one user will be using the machine.



5. Confirm the PageLight installation

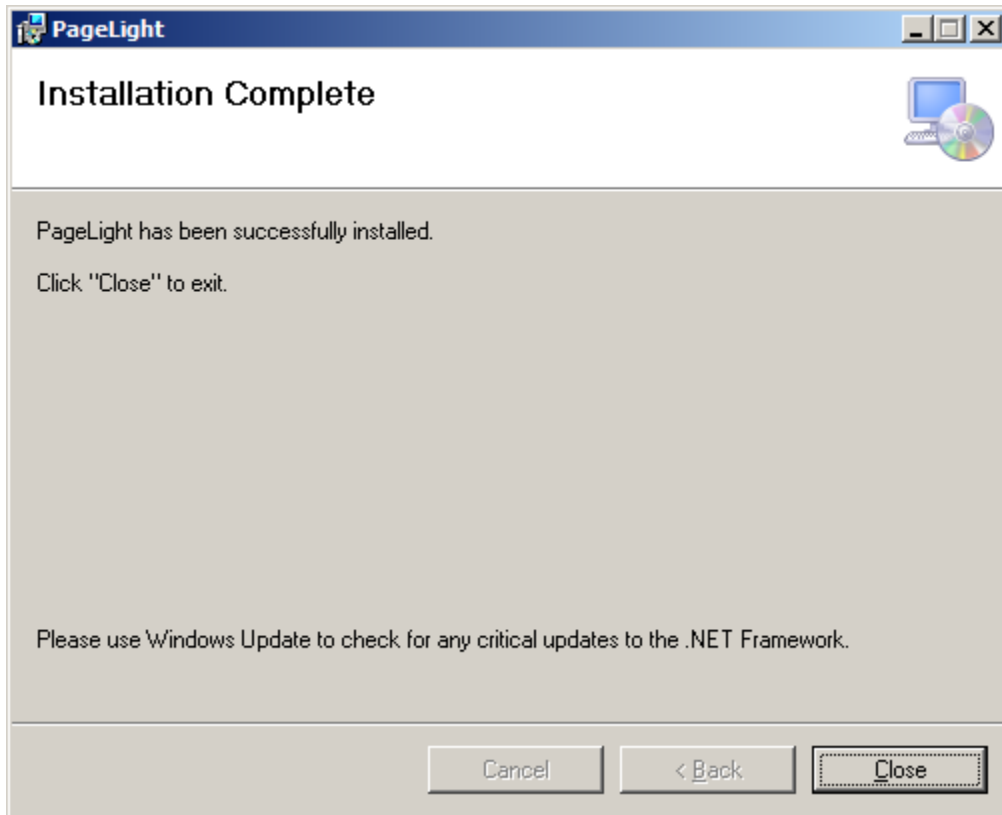


6. Accept the end user license agreement.

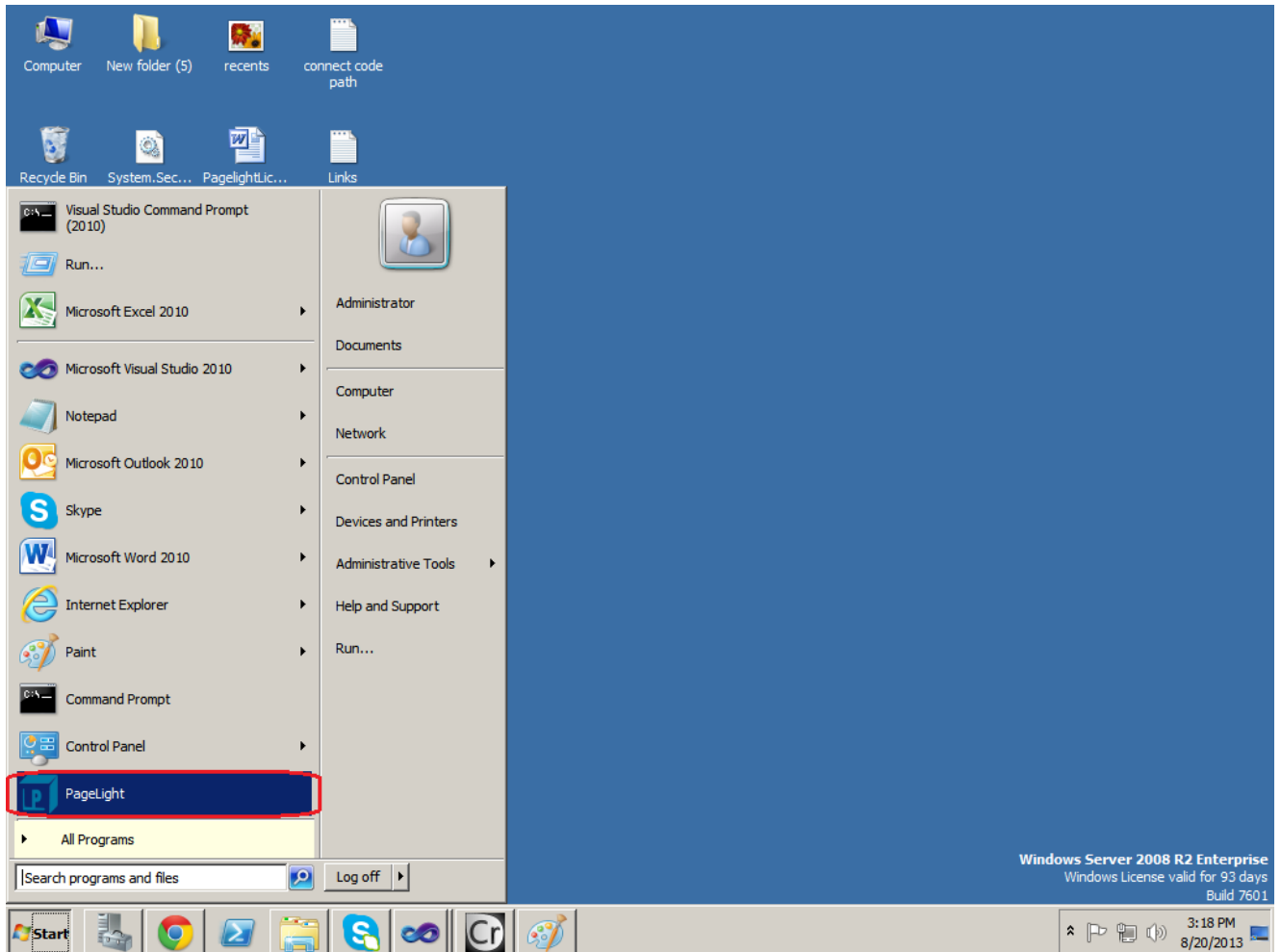




7. PageLight Installation Completed.



8. Start Microsoft Outlook. The PageLight menu option will now be available.



9. Refer to the user guide for configuring and using PageLight.

## PageLight SERVER COMPONENT INSTALLATION (Optional)

PageLightMail Server Components is an optional installation and provides some additional advanced capabilities. It supports a type of column field in SharePoint called External Field, which is connected to a technology called BCS, or Business Connectivity Services.

### INSTALLATION PROCEDURE

- 1) Download PageLightMail directly from the website: <http://www.sai-innovations.com> and unzip the installation media to a Windows directory available to your SharePoint server.

- 2) Login to the SharePoint - Windows Server with a Windows user account that has Windows Local Administration access to the server.
- 3) Browse to the Server Components for SharePoint 2010 (optional) folder on the PageLightMail installation media and double click on setup.exe.
- 4) Read and accept the PageLightMail end user license agreement.
- 5) Specify an installation path or accept the default path for installation.
- 6) At the completion of the install, IIS (Internet Information Services) will be restarted
- 7) It supports External Content Type field in SharePoint, which integrates with external application using BCS
- 8) Confirm the server component installation. Login to the SharePoint WFE as a farm administrator

### Installing PageLight using PowerShell

- 1) Locate the PageLightSolution.zip file and unzip to C:\PageLight
- 2) Go to Windows and then select Start. In the start Search for PowerShell
- 3) Right click on the PowerShell and select Run as Administrator
- 4) When PowerShell loads type the following at the command prompt  
C:  
cd \PageLight\PageLightSolution\Powershell
- 5) To deploy the solution type deploy.ps1
- 6) To remove the solution type remove.ps1
- 7) To update the solution type the following  
Update-SPSolution -Identity pageLightSolution.wsp -LiteralPath  
C:\PageLight\PageLightSolution\pagelightsolution.wsp -GACDeployment

**Note:** If PowerShell shows error like "The command <script file> was not found, but does exist in the current location". Type in PowerShell

**\$env:PATH = \$env:PATH + "."**

then enter the .\<scriptFileName>.ps1

## 4 CENTRAL CLIENT CONFIGURATION

PageLight provides a highly powerful and flexible client configuration process from centralized location. The client configuration can be set at both the initial client deployment or subsequently, if the business or technical environment changes.

The deployment process for client side configurations has been designed to allow for:

- ❖ Large deployments with a combination of different client side settings
- ❖ Roaming users
- ❖ Multiple users on the same machine
- ❖ Changing business and technical environments

### 4.1 Client Configuration Overview

#### 4.1.1 The Configuration Update Process

Client side configuration settings can be applied for a particular PageLight user or across all users. Many areas of functionality within the PageLight client can be modified by making changes to these configuration settings.

User can store the location of the PageLight directory their own. The below is the example of User directory can be created in two ways:

- 1) App Data

`C:\User\Administrator\AppData\Roaming`

- 2) Program Data

`C:\ProgramData`

Configuration setting updates can be made at any time after installation using the pageLightConfiguration.xml file. The file can be used during the initial PageLight deployment or subsequently, when business requirements or the technical environment changes.

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

## The pageLightConfigUpdate.xml file can be used to:

---

1. Add, remove or modify one or more PageLight SharePoint site collections available under PageLightMail Tab in Settings Button of the Outlook.
2. Add, remove or modify one or more SharePoint libraries/lists available in the Manage Folders navigation area of the Outlook client.
3. Rename or hide one or more PageLightMail menu items in Outlook or the PageLight ribbon buttons in Outlook 2010/2013.
4. Rename or hide the PageLight toolbar button in Outlook.
5. Enable/disable the setting of category for emails transferred to SharePoint and also specify the category name.
6. Suppress (hide) columns from the File Upload Window.
7. Enable 'Save to SharePoint' prompt when adding attachments to email messages.
8. Add a folder into a folder structure within the My PageLightMail area of Outlook
9. Enable/disable the ability to modify each setting for a library/list within PageLightMail Tab under Manage Folders.
10. Enable/disable the Suppress Upload Results Window on a library/list within My PageLightMail folders if not using Default Folder Settings.

## 4.2 Updating Client Configuration Settings

### 4.2.1 How to Apply Client Configuration Updates

---

The pageLightConfigUpdate.xml file enables the Administrator to push configuration updates out to PageLight clients.

1. User can store the location of the PageLight directory their own. The below is the example of User directory can be created in two ways:
  - a. App Data  
C:\User\Administrator\AppData\Roaming
  - b. Program Data  
C:\ProgramData
2. The configuration file can be update from centralized location, when the PageLight configuration is to be centralized location. Its allows you to centrally administer your users'

SharePoint sites, folders and favorites, making it easy for users to file emails and documents to the right locations and access the right content without having to understand SharePoint.

3. Create a file called **pageLightConfigUpdate.xml** to the one of the directories defined above. PageLight user directory with the relevant xml instructions for updating the configuration.
4. The **pageLightConfigUpdate.xml** will be processed when the Microsoft Outlook Client is next launched. The **pageLightConfigUpdate.xml** file is automatically updated after being processed in Outlook whenever the setting change made by user.

## 4.2.2 Updating a pageLightConfiguration.xml File

---

The pageLightConfigUpdate.xml always contains the following 2 lines as a minimum.

```
<configurations>  
</configurations>
```

The first line defines the file as an xml file, the <configuration> opening and closing tags are used to enclose PageLight configuration instructions, all configuration instruction tags must exist within these <configuration> tags.

Example: showing how to add a SharePoint library to a user's My PageLightMail folder list.

```
<configurations>  
<Folders>  
  <Folder SiteUrl="http://spsite" DocumentLibrary="Shared Documents" Folder="" ContentTypeId=""  
  SiteName="Testing Site" DocumentLibraryName="Shared Documents" useglobalsettings="false"  
  hideuploadsettings="false" autocheckin="false" hideresultwindow="false" setTitleAutomatically="" />  
</Folders>  
</configurations>
```

Notice in the example above that the <Folders> tag is created within the <configuration> tags. Also notice that this example includes 2 different tags, a <Folders> tag and an <Folder> tag. The parent <Folders> tag is used to group all <Folder> tags together for processing.

All of the PageLightMail tags that appear in the following sections must appear within a specific parent tag. The examples provided all show the correct parent tags to use, so please take notice of this in the examples, as placing PageLightMail configuration tags inside incorrect parent tags will result in the configuration instruction not being processed.

### 4.2.3 Managing Site Collections (Settings/Site Collections Tab)

The list of available sites can be provided in the pageLightConfigUpdate.xml file. The list will modify all existing site collections defined in the users PageLightMail Tab Settings Button dialog.

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

Create the <sharePointSites> tag and child <site> tags to specify the SharePoint sites. You may enter multiple <site> tags, one for each site.

Example: Delete all site collections

Property	Mandatory/Optional	Description
SiteUrl	Mandatory	The full URL to the SharePoint library/list
AuthType	Optional	Form Based authenticationq
Action	Mandatory	Action = "Delete all" – Delete all sites

```
<?xml version="1.0" encoding="utf-8"?>
<configurations>
<sharePointSites action = "Delete all">
  <site url="http://sample" />
  <site url="http://sample" />
  <site url="http://sp" AuthType="FBA" />
  <site url="http://spsite" />
</sharePointSites>
</configurations>
```

Example: Delete one site from SharePoint Site collections

Property	Mandatory/Optional	Description
SiteUrl	Mandatory	The full URL to the SharePoint library/list
AuthType	Optional	Form Based authenticationq
Action	Mandatory	Action = "Delete " – Delete singe site

Example: Delete one site from SharePoint Site collections

```
<?xml version="1.0" encoding="utf-8"?>
<configurations>
<sharePointSites>
  <site url=http://sample action = "Delete"/>
  <site url=http://sample action = "Delete" />
  <site url="http://sp" AuthType="FBA" />
  <site url="http://spsite" />
</sharePointSites>
</configurations>
```

Example: Insert one or more SharePoint Sites into Manage Folder

Property	Mandatory/Optional	Description
SiteUrl	Mandatory	The full URL to the SharePoint library/list
AuthType	Optional	Form Based authenticationq
Action	Mandatory	Action = "Delete " – Delete single site

```
<?xml version="1.0" encoding="utf-8"?>
<configurations>
<sharePointSites>
  <site url=http://sample action = "Insert"/>
  <site url=http://sample action = "Insert" />
  <site url="http://sp" AuthType="FBA" />
  <site url="http://spsite" />
</sharePointSites>
</configurations>
```



#### 4.2.4 Enable 'Save to SharePoint' Prompt-Add Attachment to Email in Global Setting

Enabling this setting results in PageLight prompting users when they are composing an email message and attach a file to the email message. PageLight prompts, the user if they would like to transfer the attachment to a location in SharePoint. When adding the attachment, File size can be specified in Kb or MB.

To enable this feature use the <promptduringemailattachment> tag.

The <promptduringemailattachment> tag must be inserted within opening and closing.

The promptduringemailattachment tag properties are explained in the table below.

Property	Mandatory/Optional	Description
Value	Optional	This setting determines if the prompt is shown (default is false). Valid values: "true" or "false"
enabled	Optional	This setting allows you to control if users have the ability to enable/disable this feature through the PageLightMail Settings > Global Setting tab. Valid values: "true or "false" (default is true)

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

```
<configurations>  
<promptduringemailattachment value="True" />  
<filesize value="11111" inMb="False"/>  
</configurations>
```

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

```
<configurations>  
<promptduringemailattachment value="False" />  
</configurations>
```

## 4.2.5 Enabling 'Save to SharePoint' Prompt when Sending an Email in Global Setting

---

Enabling these setting results in PageLightMail prompts users when they send an email. PageLightMail prompts the user if they would like to transfer the email to a location in SharePoint and allows them to choose a location in SharePoint. To enable this feature use the <promptduringemailsend> tag.

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

The promptSendingEmail tag properties are explained in the table below.

Property	Mandatory/Optional	Description
Value	Optional	This setting determines if the prompt is shown (default is false). Valid values: "true" or "false"

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

```
<configurations>  
<promptduringemailsend value="True" />  
</configurations>
```

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

```
<configurations>  
<promptduringemailsend value="False" />  
</configurations>
```

## 4.2.6 Customizing the Outlook Category Assignment when Email is transferred

---

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

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

The setCategoryOnTransfer tag properties are explained in the table below.

Property	Mandatory/Optional	Description
enabled	Optional	Valid values: "true" or "false"
categoryName	Optional	The name of the category to assign to transferred email messages.
CategoryColor	Optional	Set the background color
CategorycolorValue	Optional	Value for the particular color

Example: Set the category name to "custom category name"

```
<configurations>  
  <categoryforcopiedemail categoryName="Filed to SharePoint" enable="True"  
  categoryColor="Purple" categoryColorValue="24" />  
</configurations>
```

The setting of category on transfer can be disabled if this functionality is not required, as in the example below.

Example: Disable setting of category on transfer

```
<configurations>  
  <categoryforcopiedemail enable="false" />  
</configurations>
```

#### 4.2.7 Global Settings (Settings/Preferences Tab)

---

PageLightMail allows you to set Use Global Settings. These settings are used by My PageLightMail folders in "Manage Folders" area and the default setting when a new folder is added. They are applicable to List and Library PageLightMail locations only and not site folders you have added.

Use Global Settings can be set through **pageLightConfiguration.xml**.

Example 1: Setting the 'Prompt for upload location and properties' in Global Setting

```
<configurations>  
  <globalFoldersettings>  
  <hideuploadsetting value="True" />  
  </globalFoldersettings>  
</configurations>
```

Setting 'Prompt for upload location and properties' in Global Setting

Property	Mandatory/Optional	Description
Value	Mandatory	"true" or "false"
Name	Mandatory	hideuploadsetting

Example 2: Setting the 'Hide Upload Results Window' Default Global Folder Setting

```
<configurations>
<globalFolderSettings>
<hideResultsWindow value="True" />
</globalFolderSettings>
</configurations>
```

Settings for "Hide Upload Results Window" is listed in the table below:

Property	Mandatory/Optional	Description
Value	Mandatory	"true" "false"
Name	Mandatory	hideResultsWindow

Example 3: Setting the 'Auto Set Title in Documents to Library':

```
<configurations>
<globalFolderSettings>
<AutoTitle value="False" />
</globalFolderSettings>
</configurations>
```

Settings for setting "Do Not Auto Set Title in Documents to Library" are listed in the table below:

Property	Mandatory/Optional	Description
Value	Mandatory	"true" "false"
Name	Mandatory	AutoTitle

Example 4: Setting the 'Do Not Overwrite Documents to Library':

```
<configurations>
<globalFolderSettings>
<IsOverwrite value="False" />
</globalFolderSettings>
</configurations>
```

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

Property	Mandatory/Optional	Description
Value	Mandatory	"true" "false"
Name	Mandatory	Overwrite

#### 4.2.8 Meta Data - Default Column Mapping

---

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

The PageLight configuration file allows you to override the default mapping of the Outlook message field name to the SharePoint column display name.

To adjust the SharePoint metadata column name for a particular Outlook message field, the SharePoint Column attribute of the appropriate Mapping element is changed. It is also possible to specify multiple mappings for the same message field. That is, the same field can be mapped to multiple SharePoint metadata columns.

In order to map an email property being transferred using PageLightMail to a custom column of your choosing, you need to create an item in the Central Column Mapping list in SharePoint.

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

Email Column Name (From Column)	Default SharePoint Column Name (To Column)
Subject	EmailSubject
EmailToAddress	To
EmailCC	CC
EmailBCC	BCC
EmailFrom	SenderEmailAddress
EmailFromName	SenderName
EmailType	SenderEmailType
EmailSentDate	SentOn
mailReceivedDate	ReceivedTime
EmailDate	CreationTime

EmailID	EntryID
EmailAttachmentCount	AttachCount
EmailAttachmentNames	AttachmentNames
EmailConversation	ConversationTopic
EmailConversationID	ConversationID
EmailConversationIndex	ConversationIndex
EmailBody	Body
CreationTime	To

## Adding Column in Default column Mapping

---

PageLight allows user to add columns in default mapping field.

### Example:

```
<configurations>
  <columnmappings useListforColumnMap="true" columnMapListUrl="" >
    <columnmap SharePointColumn="Importance" emailColumn=" Importance" action = 'Add' />
    <columnmap SharePointColumn="EmailFromName" emailColumn="SenderName" action = 'Add' />
    <columnmap SharePointColumn="FromType" emailColumn="FromType" action = 'Add' />
  </columnmappings>
</configurations>
```

## 4.2.9 Meta Data Setting

---

When uploading e-mail messages to SharePoint using PageLightMail, it can automatically map the e-mail headers (From, To, CC, Subject, Date, etc.) to SharePoint document columns. To enable this mapping, the SharePoint document library needs to be set up with e-mail specific columns.

Managed metadata is a set of hierarchical terms that you can use to classify items in SharePoint. The terms are defined in the SharePoint site, and are available to you when you are filing emails.

### Meta Data Mapping is applied in two different levels:

- a. Content Type level: Mapping will be applied in all document libraries when the content type is used to tag contents
- b. Document Library and Content Type: Mapping will be used only when a specific document library and content type is selected to tag contents

## Setting for Meta Data to Email or Document

Property	Mandatory/Optional	Description
Url	Mandatory	"true" "false"
Name	Mandatory	The name of the SharePoint library
contenttype Id	Mandatory	Must be set the content Type
Email / Document	Mandatory	The Meta data mapping type Email or Document
name	Mandatory	The Column Name of the Metadata column mapping.
maptype	Mandatory	Mapping list of column type is maptype= Editable by User ("E") Computed ("C") Hidden ("H") Default Mapping ("D")
formula	Mandatory	Set the formula for Date and True or False. E.g. DateTime.Now.AddDays(4) False or True

### Example 1 : Meta Data Column Mapping for Email and Document in Meta Data Setting

```
<?xml version="1.0" encoding="utf-8"?>
<configurations>
<documentlibrary Url="http://spsite" Name="Team">
  <contenttype Id="0x010100673516A09A006A44B4790172E042C930">
    <document>
      <field name="EntryDate" maptype="C" formula="DateTime.Now.AddDays(4)" />
      <field name="ValueRequired" maptype="H" formula="false" />
      <field name="Static_Display" maptype="D" formula="&quot;today date
is&quot;+ DateTime.Now" />
      <field name="Title" maptype="E" />
    </document>
    <email>
      <field name="Title" maptype="E" />
      <field name="username" maptype="H" />
      <field name="ValueRequired" maptype="D" formula="false" />
      <field name="Static_Display" maptype="C" formula="&quot;today date
is&quot;+ DateTime.Now" />
      <field name="EmailFrom" maptype="D" />
      <field name="EmailCC" maptype="D" />
    </email>
  </contenttype>
</documentlibrary>
</configurations>
```

Example 2:

```
<?xml version="1.0" encoding="utf-8"?>
<configurations>
<documentlibrary Url="http://spsite" Name="DL_MultipleBCS">
<contenttype Id="0x010100D2009695DBF07742B1950E033862E73E">
  <document>
    <field name="Title" maptypes="H" />
    <field name="Column1_DateTime" maptypes="C" formula="today+2" />
    <field name="Column2_Date" maptypes="C" formula="now" />
    <field name="column3_StaticText" maptypes="C" formula="TEST FROM SAI" />
  </document>
  <email>
    <field name="Title" maptypes="H" />
    <field name="WorkAddress" maptypes="C" formula="USA" />
    <field name="dt_1" maptypes="C" formula="today+10" />
    <field name="dt_2" maptypes="D" />
    <field name="dt_3" maptypes="E" />
    <field name="StaticText_disp" maptypes="C" formula="STATIC TEXT TEST5" />
  </email>
</contenttype>
</configurations>
```

#### 4.2.10 Capture the Email Body as Column Meta-Data – Emails

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

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

The EmailBody tag properties are explained in the table below.

Property	Mandatory/Optional	Description
value	Mandatory	Valid values: "true" or "false"

Example: Enable the capture of Email Body for email.

```
<configurations>
<columnmappings>
  <columnmap SharePointColumn="EmailBody" emailColumn="Body" />
</columnmappings>
</configurations>
```

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



## 4.2.11 Managing My PageLightMail Folders

---

### Adding One or More My PageLightMail Folders

Example 1: Add Docs library of Company Docs libraries to My PageLightMail

```
<?xml version="1.0" encoding="utf-8"?>
<configurations>
<Folder SiteUrl="http://spsite" DocumentLibrary="Shared Documents" Folder="Word Document/User
GuideAuthType="" ContentTypeId="0x0101007900268E28B84C46857C39E0433E3545"
SiteName="http://spsite" DocumentLibraryName="Shared Documents" useglobalsettings="False"
hideuploadsettings="True" hideresultwindow="False" DocumentLibraryId="2A2E4DB0-240F-414B-ABB9-
76C00CE1242D" AutoTitle="True" IsOverwrite="True" />
</configurations>
```

Create the <Folders> tag and child <Folder> tags to specify the SharePoint libraries/lists or sites to add to the users PageLightMail folders in Outlook. You may enter multiple <Folder> tags, one for each library/list or site you wish to make available.

When libraries/lists or sites are added, there are several folder properties that can be set, these are explained in the tables below. There are three property tables below, one explaining the possible properties if using Default Folder Settings (list and library locations only), another details the properties available if not using default folder settings (list and library locations only) and the other table details the attributes that must be set if adding a site location as a My PageLightMail location.

Table 1 - Using Global Folder Settings (List and Library locations)

Property	Mandatory/Optional	Description
folderName	Mandatory	The display name to use for the folder in Outlook
SiteUrl	Mandatory	The full URL to the SharePoint library/list
useGlobalSettings	Mandatory	Must be set to "true" to use Default Global Folder Settings
Folder	Optional	If specifying a folder within a library/list
ContentTypeId	Mandatory	Must be set the content Type
hideresultwindow	Optional	This corresponds to the folder setting "Hide Upload Results Window" in Outlook. This is an optional property and can be set to "true" or "false" (default if omitted is false)

autocheckin	Optional	This corresponds to the folder setting "Automatically Check-In Documents to this Library" in Outlook. This is an optional property and can be set to "true" or "false" (default if omitted is false)
hideuploadsettings	Optional	This corresponds to the folder setting "Hide Upload Setting" in Outlook. This is an optional property and can be set to "true" or "false" (default if omitted is false)
Auto Set Title	Optional	Title will set default if select the autotitle. This is an optional property and can be set to "true" or "false" (default if omitted is false)
IsOverwrite	Optional	It will overwrite the existing file. This is an optional property and can be set to "true" or "false" (default if omitted is false)
EntryId	Optional	Unique entry for that meta data column

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

Property	Mandatory/Optional	Description
folderName	Mandatory	The display name to use for the folder in Outlook
SiteUrl	Mandatory	The full URL to the SharePoint library/list
useGlobalSettings	Mandatory	Must be set to "false" to use Default Global Folder Settings
operationMode		Valid Values are one of: "PromptAll" "NoPrompt"
Folder	Optional	If specifying a folder within a library/list
ContentTypeId	Mandatory	Must be set the content Type
hideresultswindow	Optional	This corresponds to the folder setting "Hide Upload Results Window" in Outlook This is an optional property and can be set to "true" or "false" (default if omitted is false)
IsOverwrite	Optional	It will overwrite the existing file. This is an optional property and can be set to "true" or "false" (default if omitted is false)
Auto Set Title	Optional	Title will set default if select the autotitle. This is an optional property and can be set to "true" or "false" (default if omitted is false)

## 4.2.12 Customizing PageLightMail Menu, Toolbar Items, Send & File Button – Outlook

Button labels and visibility are customized using the Menu tag in Outlook.

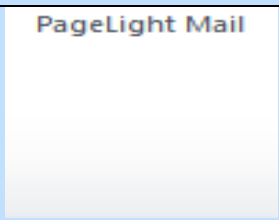
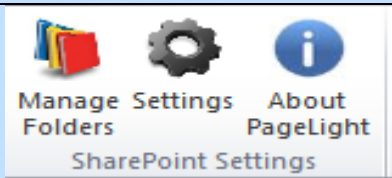
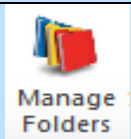

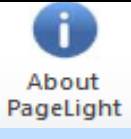
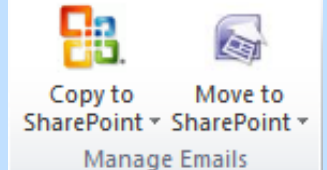
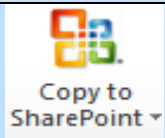
The <Menus> tag must be inserted within a hierarchy of opening and closing

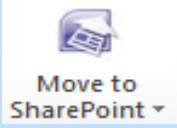
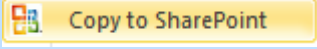
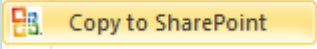
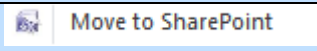
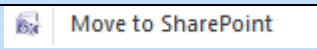
```
<configurations>
  <Menus>
    <SettingsTab caption="PageLight Mail" hidden="false" />
    <SettingsGroup caption="SharePoint Settings" hidden="false" />
    <Folders caption="Manage Folders" hidden="false" />
    <RefreshConfiguration caption="Refresh Settings.." hidden="false" />
    <CopySharePoint caption="Copy to SharePoint" hidden="false" />
    <MoveSharePoint caption="Move to SharePoint" hidden="false" />
    <SharePointTransferGroup caption="Manage Emails" hidden="true" />
    <SharePointLibrary hidden="false" caption="SharePoint Library" />
    <SendFile hidden="false" caption="Send and File" />
    <ComposeMailGroup hidden="false" caption="PageLight Mail" />
    <RightClickCopyMultiple caption="Copy to SharePoint" hidden="" />
    <RightClickCopySingle hidden="false" caption="Copy to SharePoint" />
    <RightClickMoveSingle hidden="false" caption="Move to SharePoint" />
    <RightClickMoveMultiple hidden="false" caption="Move to SharePoint" />
    <CopyAttachments hidden="false" caption="Copy Attachment(s) to SharePoint" />
    <Settings hidden="false" caption="Settings" />
    <FileToSharePoint hidden="false" caption="File To SharePoint" />
    <MailCopyToSharePoint hidden="false" caption="Copy To SharePoint" />
    <CopyToSharePoint hidden="false" caption="Copy To SharePoint" />
  </Menus>
</configurations>
```

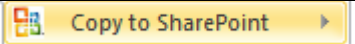
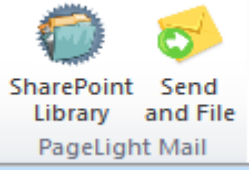
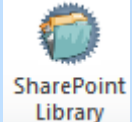
The Menu tag properties are explained in the table below.

Property	Mandatory/Optional	Description
hidden	Optional	"true" "false"
Caption	Optional	Specify a value for this property to give a ribbon item a custom label
Tag	Mandatory	This property identifies the ribbon item to customise (tab, tab group, button etc)

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

Tag	Button	Description
<b>SettingsTab</b>		<p>This tag controls the entries PageLightMail tab in the main ribbon of Outlook 2010</p> <p>Setting the hidden property to "true" will hide the entire tab (including all buttons on the tab).</p> <p>Setting the label property will change tab display name</p>
<b>SettingsGroup</b>		<p>Setting the hide property to "true" will hide this entire group of buttons on the PageLightMail ribbon tab Setting the label property will change the group label</p>
<b>Folders</b>		<p>Setting the hide property to "true" will hide this button. Setting the label property will change the name of the button.</p>
<b>Settings</b>		<p>Setting the hide property to "true" will hide this button. Setting the label property will change the name of the button.</p>
<b>About PageLight</b>		<p>Setting the hide property to "true" will hide this button. Setting the label property will change the name of the button.</p>
<b>SharePointTransferGroup</b>		<p>Setting the hide property to "true" will hide this entire group of button on the 'Home' tab of Outlook 2010. Setting the label property will change the name of the group</p>
<b>CopySharePoint</b>		<p>This ribbon button consists of 2 elements.</p> <p>To set the visibility you must set</p>

		Copy to SharePoint hide property to "true" will hide this button on the 'Home' tab of Outlook 2010.
<b>MoveSharePoint</b>		This ribbon button consists of 2 elements.  To set the visibility you must set Move to SharePoint hidden property to "true" will hide this button on the 'Home' tab of Outlook 2010.
<b>RightClickCopySingle</b>		Setting the hidden property to "true" will hide this button in the right click menu in Outlook 2010. This option is visible when selecting a single email and right clicking on it. Setting the label property will change the name of the button.
<b>RightClickCopyMultiple</b>		Setting the hidden property to "true" will hide this button in the right click menu in Outlook 2010. This option is visible when selecting a multiple emails and right clicking on them. Setting the label property will change the name of the button.
<b>RightClickMoveSingle</b>		Setting the hidden property to "true" will hide this button in the right click menu in Outlook 2010. This option is visible when selecting a single email and right clicking on it. Setting the label property will change the name of the button.
<b>RightClickMoveMultiple</b>		Setting the hidden property to "true" will hide this button in the right click menu in Outlook 2010. This option is visible when selecting a multiple emails and right clicking on them. Setting the label property will change the name of the button.

<b>CopyAttachments</b>		Setting the hidden property to "true" will hide this button in the right click attachments menu of a mail item in Outlook 2010. This option is visible when selecting attachments in an email and right clicking on them.
<b>ComposeMailGroup</b>		This will hide the PageLightMail group and all contained item on the new Mail Message ribbon (on the Message tab)
<b>SharePointLibrary</b>		This will hide the SharePoint sites within mail.

Example 1: Remove the entire PageLightMail ribbon tab from Outlook

```
<configurations>
<Menus>
  <SettingsTab caption="PageLight Mail" hidden="false" />
</Menus>
</configurations>
```

Example 2: Hide the **Move To SharePoint** and **Copy to SharePoint** toolbar buttons (limits user to only perform drag-drop transfer to PageLightMail folders).

```
<configurations>
<Menus>
  <CopySharePoint caption="Copy to SharePoint" hidden="true" />
  <MoveSharePoint caption="Move to SharePoint" hidden="true" />
</Menus>
</configurations>
```

Example 3: Hide the **Send & File** toolbar button when composing email

```
<configurations>
<Menus>
  <SendFile hidden="true" caption="Send and File" />
</Menus>
</configurations>
```

### 4.2.13 Customizing the Email Filename Format

---

The format of the filename that is created when transferring email messages can be modified by using the <filename> tag. 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. User Help Documet\_2093297239.msg

The following filename formats are available:

Syntax	Column Value	Output File Name
<filename value="subject\$\$(senton+sender name)" qualifer="\$" />	Subject – User Guide Senton - 7/26/2013 1:31:23 Sendername - "Kelly Thomas"	User Guide\$1884119944
<filename value="subject_\$(senton+ SenderEmailAddress)" qualifer="_" />	Subject - User Help Document Senton - 7/26/2013 1:31:23 SenderEmailAddress - ricky1braddy@gmail.com	User Help Documet_20932972 39
<filename value="subject_#EmailAddress+s enton)" qualifer="_" />	Subject - Uploaded Document EmailAddress - nick4mitchell@gmail.com Senton - 7/26/2013 1:31:23	Uploaded Document_- 34352780

### 4.2.14 Capture the Email Body as Column Meta-Data – Attachments

---

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

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

The EmailAttachmentNames tag properties are explained in the table below.

Property	Mandatory/Optional	Description
value	Mandatory	Valid values: "true" or "false"

Example: Enable the capture of Email Body for email.

```
<configurations>  
<columnmappings>  
  <columnmap SharePointColumn="EmailAttachmentNames" emailColumn="AttachmentNames" />  
</columnmappings>  
</configurations>
```

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

#### 4.2.15 Customizing the PageLightMail Folder Name and Homepage

---

The '- PageLightMail -' folder Name in Outlook can be customized. To have different name and URL, change the name and/or URL use a <rootFolder> tag. The URL of the PageLightMail Folder in Outlook defaults to <http://www.sai-innovations.com> and the name defaults to "- PageLightMail -".

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

Property	Mandatory/Optional	Description
URL	Optional	Text for the URL of the website
folderName	Optional	Root foldername of the Folder

Example: Set the homepage URL <http://www.sai-innovations.com/> and the folder name to "PageLightMail" SharePoint Folders".

```
<configurations>  
  <rootFolder URL="http://www.sai-innovations.com" folderName="PageLightMail" />  
</configurations>
```



## 4.2.16 Illegal Character Stripping from Filenames

---

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

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

The `<fileNameIllegalCharacters>` tag must be inserted within opening and closing `<outlook>` tags. You must also insert a `<![CDATA[&~#%*?/+|"{}\<>]]>` which is a regular expression. Replace `&~#%*?/+|"{}\<>` " with your own regex statement.

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

```
<configurations>  
  <fileNameIllegalCharacters><![CDATA[&~#%*?/+|"{}\<>]]></fileNameIllegalCharacters>  
</configurations>
```