

CFS Email Integration Feature Specification

1. Feature Description

CFS 2.0 will allow Outlook email messages to be imported in to CFS document libraries simply by dragging the message from Outlook on to the CFS document library.

The goal of the Email Integration feature is to allow an automated mapping from Outlook email message fields in to SharePoint document library columns during the import process.

2. Feature Scope

The feature will support Outlook 2003 and Outlook 2007. The automated mapping from Outlook message fields to corresponding SharePoint library columns is only supported for Email type messages (not Contacts, Calendar Items, Tasks, etc.)

The feature will be included in the following product editions:

1. Contributor SME
2. Contributor Enterprise

The feature is supported on all operating systems that CFS runs on, but will be mainly tested on Windows XP and Windows Vista.

The feature is supported with SharePoint 2003 and 2007.

3. Feature Details

3.1 Basic Function

When an Outlook message (.msg) file is added to a CFS document library by drag-and-drop or other means, the “New Item” window will be shown as normal. Prior to displaying this window, CFS will examine the .msg file, looking for any of the supported message fields. If a supported field is found, CFS will check if a metadata column exists in the SharePoint document library with the matching display name (case-insensitive) and the appropriate data type. If a matching column exists, the column is prepopulated with the value from the message file.

The set of supported Outlook message fields (and the required SharePoint column data type) is specified below.

The mapping from Outlook message fields to corresponding SharePoint column names is configurable, as specified below.

3.2 Supported Outlook Message Fields

| Outlook Message Field Name | Field Description | SharePoint column required data type | Minimum Required CFS version |
|-----------------------------------|--|---|-------------------------------------|
| Attachment | Does the message contain attachments? | Yes/No | 2.0 |
| Bcc | Bcc field of message (semi-colon separated list of names). | Text (single-line or multiline) | 2.0 |
| Bcc-Address | Semi-colon separated list of Bcc email addresses | Text | 2.1 |
| Bcc-Type | Semi-colon separated list of Bcc address types (EX, SMTP, etc.). | Text | 2.1 |
| Categories | Message categories | Text | 2.0 |
| Cc | Cc field of message (semi-colon separated list of names) | Text | 2.0 |
| Cc-Address | Semi-colon separated list of Cc email addresses | Text | 2.1 |
| Cc-Type | Semi-colon separated list of Cc address types (EX, SMTP, etc.) | Text | 2.1 |
| Conversation | Subject line of original message in the thread | Text | 2.0 |
| From | From field of message | Text | 2.0 |
| From-Address | Email address of sender | Text | 2.1 |
| From-Type | Email address type (EX, SMTP, etc.) | Text | 2.1 |

| Outlook Message Field Name | Field Description | SharePoint column required data type | Minimum Required CFS version |
|-----------------------------------|--|---|-------------------------------------|
| Importance | Importance setting specified for message in Outlook | Number | 2.0 |
| Received | Date/time when message received | Date/Time | 2.0 |
| Received-UTC | Date/time when message received (in UTC). | Date/Time | 2.1 |
| Sensitivity | Sensitivity setting specified for message in Outlook | Number | 2.0 |
| Sent | Date/time when message sent | Date/Time | 2.0 |
| Sent-UTC | Date/time when message sent (in UTC). | Date/Time | 2.1 |
| Subject | Subject line of message | Text | 2.0 |
| To | To field of message (semi-colon separated list of names) | Text | 2.0 |
| To-Address | Semi-colon separated list of To email addresses | Text | 2.1 |
| To-Type | Semi-colon separated list of To address types (EX, SMTP, etc.) | Text | 2.1 |

NB: Where the address type is Exchange, the address is in Exchange format, not SMTP format.

Exchange format: /O=ENTERPRISE/OU=FIRST ADMINISTRATIVE GROUP/CN=RECIPIENTS/CN=Support

SMTP format: support@colligo.com

3.3 Configuring Mapping from Outlook Message Fields to SharePoint Columns

By default, the required SharePoint column display name matches the Outlook message field name shown in the table above.

The email configuration file allows the default mapping from Outlook message field name to SharePoint column display name to be overridden. The file must be named EmailConfig.xml and must be stored in one of the following locations (in order of precedence):

- <%UserProfile%>\Local Settings\Application Data\ColligoOfflineClient\Config\Email¹
- <%UserProfile%>\Application Data\ColligoOfflineClient\Config\Email
- <%AllUsersProfile%>\Application Data\ColligoOfflineClient\Config\Email

The format of the EmailConfig.xml file is as shown below. To adjust the SharePoint metadata column name for a particular Outlook message field, the SPColumn 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.

```
<?xml version="1.0" encoding="utf-8"?>
<CfsEmail>
  <Mappings>
    <Mapping Field="Attachment" SPColumn="Attachment"/>
    <Mapping Field="Bcc" SPColumn="Bcc"/>
    <Mapping Field="Bcc-Address" SPColumn="Bcc-Address"/>
    <Mapping Field="Bcc-Type" SPColumn="Bcc-Type"/>
    <Mapping Field="Categories" SPColumn="Categories"/>
    <Mapping Field="Cc" SPColumn="Cc"/>
    <Mapping Field="Cc-Address" SPColumn="Cc-Address"/>
    <Mapping Field="Cc-Type" SPColumn="Cc-Type"/>
    <Mapping Field="Conversation" SPColumn="Conversation"/>
    <Mapping Field="From" SPColumn="From"/>
```

¹ This location is only available in CFS 2.1.12 and later.

```
<Mapping Field="From-Address" SPColumn="From-Address"/>
<Mapping Field="From-Type" SPColumn="From-Type"/>
<Mapping Field="Importance" SPColumn="Importance"/>
<Mapping Field="Message Body" SPColumn="Message Body"/>
<Mapping Field="Received" SPColumn="Received"/>
<Mapping Field="Received-UTC" SPColumn="Received-UTC"/>
<Mapping Field="Sensitivity" SPColumn="Sensitivity"/>
<Mapping Field="Sent" SPColumn="Sent"/>
<Mapping Field="Sent-UTC" SPColumn="Sent-UTC"/>
<Mapping Field="Signed By" SPColumn="Signed By"/>
<Mapping Field="Subject" SPColumn="Subject"/>
<Mapping Field="To" SPColumn="To"/>
<Mapping Field="To-Address" SPColumn="To-Address"/>
<Mapping Field="To-Type" SPColumn="To-Type"/>
</Mappings>
</CfsEmail>
```