

The Email to SharePoint Connector



01

Emails and Attachments (Records)

Realize Time & Cost Savings, Increase Compliance

Storing emails and attachments in a centralized repository like SharePoint Online instead of leaving them in Outlook:

- Is critical for records management, governance & compliance
- Strengthens knowledge management and collaboration
- Drives consumption and user-adoption of SharePoint and Teams as your system for records and knowledge management, further leveraging your investment in Microsoft 365



02

Tagging, Labelling & Automation

Save Emails to SharePoint from Within Outlook

- Quickly and easily file emails and attachments to SharePoint Online without leaving Outlook
- Empower users to save and auto-apply meta-data and retention labels to emails compliantly. No app-switching necessary



03

SharePoint (Adhering to RM Policy)

Search and Share Emails from SharePoint

- Email SharePoint content as links for easy collaboration and file-sharing with team members
- Quickly search across SharePoint right from Outlook for opening or sending files with ease

Filing

- File email and attachments to SharePoint Online, Teams, and OneDrive
- File singular emails (up to 20 at a time) or in bulk (batches)
- Configure default actions to move or copy emails
- Support for Pinned (Favourite) Locations for quick email filing
- Smart conflict resolution to prevent duplicate names for emails and attachments

Classification

- Automatically extract email metadata and/or manually capture custom fields
- Ability to hide non-required fields when tagging metadata
- Support for customized and managed metadata (taxonomies and keywords) and person/group metadata

View

- Browse SharePoint, Teams, and OneDrive

Search

- Search SharePoint, Teams, and OneDrive

Share

- Email SharePoint content as attachments in a new email
- Email attachments from SharePoint as links to prevent multiple copies of the same content

Central Administration

- Centralized and simplified deployment via the Microsoft 365 add-in framework
- Admin capabilities to push sites, policies and streams (libraries) to users

Authentication

- Microsoft 365, Azure AD

System Compatibility

- Outlook Desktop for Mac or Windows, Outlook Online or Outlook on mobile devices
- SharePoint Online

Language

- English

Multi-cloud/Platform

- SharePoint Online, Teams and OneDrive



Colligo Content Manager for Microsoft 365

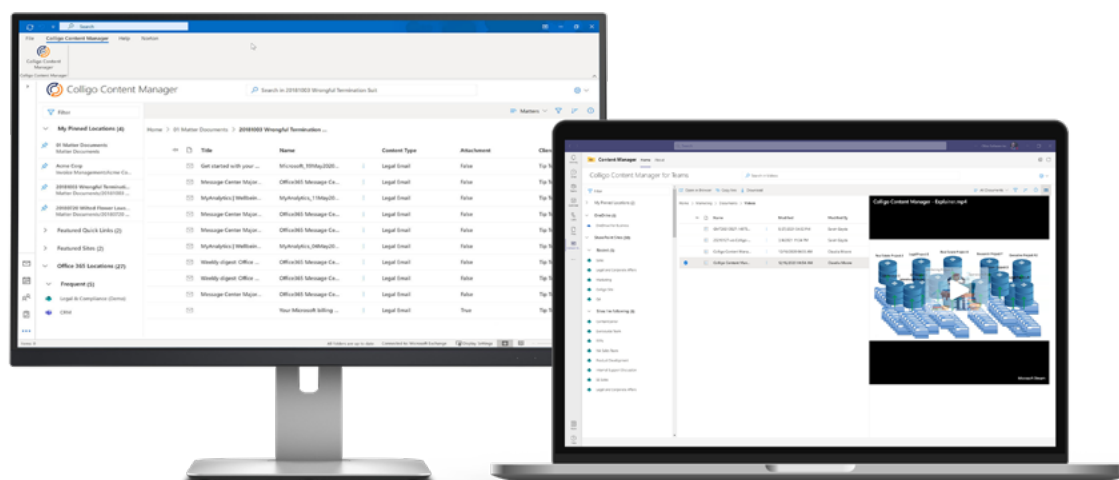
Access and Manage SharePoint from Outlook and Teams



Colligo Content Manager for Microsoft 365 allows you to work where you spend most of your time: Outlook and Teams. A true cloud-based solution built on the latest Microsoft 365 architecture, Content Manager provides full content and document control from one central location for an enhanced user experience and superior governance and compliance.

Make SharePoint more usable and accessible - from Outlook, Teams, or the web browser

- Easily explore and preview any SharePoint file right from Outlook, Teams, or the web browser
- Efficiently search for and filter files & share quick links to the latest versions right from Outlook or Teams
- Pin favourite locations or create a dashboard for quick access to SharePoint files
- Preview any file without leaving Outlook, Teams, or the web browser application
- Drag and drop content into Content Manager (and SharePoint) from any location with auto-applied metadata
- Save time by reducing the need to switch between Outlook, Teams, and SharePoint and get everything you need in a single space



Features: Colligo Content Manager for Microsoft 365



Colligo brings the best of SharePoint into Outlook and Teams for Microsoft 365. Protect corporate knowledge and make collaboration simple with Colligo's easy-to-use and deploy add-ins.

Capture	Move files to SharePoint or Teams while capturing metadata and setting retention labels
	Bookmark favourite SharePoint/Teams/OneDrive locations
	Move or copy emails to SharePoint/Teams/OneDrive
	Resolve conflicts while uploading files in SharePoint/Teams/OneDrive
Classification	Extract metadata automatically, and manually capture custom fields
	Update metadata for files in SharePoint/Teams/OneDrive
Sort & Filter	Sort and filter files in SharePoint/Teams/OneDrive, all from a single pane within Teams
	Filter search results in SharePoint/Teams/OneDrive
Search	Search SharePoint/Teams/Onedrive for metadata or content
	Create folders in SharePoint/Teams/OneDrive
Browsing	Centralized navigation of all SharePoint/Teams/OneDrive sites from Outlook
	Enhanced review of file contents in SharePoint/Teams/OneDrive
	Launch files from SharePoint/Teams/OneDrive in native applications
	Keep track of recently used locations
Share & Collaborate	Share SharePoint/Teams/OneDrive content as a link or attachment in a new chat or channel
	Edit files in SharePoint/Teams/OneDrive
Install & Configuration	Customize a dashboard to give groups of users convenient access to important file locations
	Centrally manage policies and configurations in Colligo Admin Center
Outlook Integration	See summaries of your Inbox, Tasks, and recently uploaded files on the home screen
System Compatibility	Support for iOS, Android, and Windows and Mac
	Available for Outlook 2013, 2016, 2019+, and Web Client
Multi-Cloud	SharePoint, OneDrive, Teams
Deployment Time	Minutes

* Support for Outlook Pro Plus versions of 2013, 2016, 2019+

www.colligo.com

@colligo info@colligo.com

+1.866.685.7962

+1.604.685.7962 x238

Explore SharePoint right
from Outlook and Teams,
find and share files faster

[REQUEST A DEMO](#)

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Colligo Office Connect for Microsoft 365

File and tag Excel, Word, and PowerPoint files
directly to SharePoint, Teams, and OneDrive



Colligo Office Connect for Microsoft 365 lets you search for, open, and save files to Microsoft SharePoint and Teams right from the Microsoft suite of Office applications—with full metadata and retention label support. With it, your teams can file, tag, and discover content faster.

Office Connect makes SharePoint more accessible and usable, right from the Office applications, and all from a familiar Colligo interface.

Benefits for end-users:

- Easily save Microsoft Office files to SharePoint, Teams, and OneDrive on-the-go with a familiar experience across devices.
- Automatically extract file metadata properties or manually prompt for and capture custom fields.
- Search for or browse SharePoint content within Microsoft 365's native interfaces, without the need to switch apps.
- Quickly find the right place to save content via quick links to recent and frequently-used SharePoint sites.

Benefits for the company:

- Quickly deploy the app using the simple Microsoft 365 add-in framework so users get instant access.
- Drive consumption and user-adoption of SharePoint as your system for records and knowledge management.
- Leverage Microsoft 365 and support BYOD without compromising information management compliance.
- Centrally configure site access for users and groups with an administrative tool line of business and knowledge managers can use.
- Help ensure documents end up in the right place, properly tagged, and according to policy.



Features: Colligo Office Connect for Microsoft 365



Filing	• The ability to save Office files (Word/Excel/PPT) with metadata to SharePoint from within each app • Version support • Conflict Resolution • The ability to create a folder within a SharePoint library
Classification	• Prompts for whatever metadata is configured for a selected content type • Allows users to select content types (associated with that library) • Prompts for retention labels • The ability to save with full document set support
View	• SharePoint View support
Search	• Integrated SharePoint search capabilities • Full sorting and filtering capabilities when searching
Share	• Version support • Conflict Resolution
Central Administration*	• Centralized and simplified deployment via the Microsoft 365 add-in framework • Admin capabilities to push sites, policies, and streams (libraries) to users
Authentication	• Microsoft 365
System Compatibility	• SharePoint Online, SharePoint 2013/2016/2019 (including ProPlus and Office 365) • Virtualization Services (including Xen Desktop, XenApp, Terminal Services) • Office 2016 • iOS Outlook App • Android Outlook App
Language	• English
Multi-Cloud/Platform	• SharePoint Online, Teams, and OneDrive

* Provided through Colligo Configuration Manager. Please contact Sales for more information.
Feature list subject to change without notice.

www.colligo.com

@colligo info@colligo.com

+1.866.685.7962

+1.604.685.7962 x238

Colligo Office Connect for
Microsoft 365 complements
Colligo's email capture solutions.

REQUEST A DEMO

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Metadata Enrich

Transform your legacy SharePoint files with structured, consistent, AI-ready metadata.



Turn legacy content into structured, searchable gold

Metadata Enrich retroactively adds, updates and enriches metadata for files already stored in SharePoint Online — starting with email files. Instead of manually tagging historical content, (or worse, leaving it untagged) our tool backfills and corrects metadata at scale, making old content look like newly ingested and enriched content.



Add, update, enrich tags

- Retroactively apply or update metadata to existing SharePoint files
- Populate blank fields or correct inaccurate tags
- Extract, catalog, index and enrich metadata fields
- Make legacy email content look and behave like newly migrated content
- Prepare content for advanced search, workflows and AI integration



Surface clean, usable data

Designed for SharePoint administrators and data specialists, Metadata Enrich is ideal for organizations that:

- Have been dragging and dropping emails into SharePoint with missing metadata
- Migrated from file shares or other systems to SharePoint
- Previously moved emails into SharePoint through other tools or products
- Want to automate metadata application on existing content in SharePoint

Start a [free trial](#) now!

+1.866.685.7962

sales@colligo.com

Metadata Enrich

Powerful results



Optimized Metadata Hygiene

- Retroactively applies consistent tags that match your SharePoint configuration
- Ensures uniform metadata structure and labelling across old and new files

Smarter Search & Discovery

- Improves records classification and governance
- Enables more accurate search, workflow automation and compliance
- Surfaces unstructured documents to unlock intelligence and actionable insights

Secure & Governed AI Enablement

- Gives control over what content AI can access
- Protects sensitive or confidential data from unauthorized AI use
- Tags and labels files so AI can surface richer insights and more accurate responses

Increased Efficiency & Cost Savings

- Eliminates the need for manual metadata cleanup
- Reduces admin overhead while enhancing data usability
- Sets the foundation for downstream AI and/or workflow automation

Advanced Security & Control

- Built on the same secure Azure infrastructure as Colligo Email Manager

LET'S GET YOU STARTED!



Preferred
Content AI



Start Your [Trial](#) Today

 [+1.866.685.7962](tel:+18666857962)

 sales@colligo.com