
SOXS Manual

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INTRODUCTION

[SOXS is the "Missing Link between SharePoint and Outlook for efficient Email Management with SharePoint."](#)

SOXS enables you to save emails and their attachments with simple Drag & Drop in SharePoint.

This is a fast and intuitive way for users to store emails.

This guide is intended for administrators and users alike:

- The section [Work with the SOXS-Client](#) is an introduction for users.
- The section [Installation](#) is intended for administrators and about software requirements and installation methods.

We recommend that you also watch the [Video Introduction to SOXS](#) on your Website, which provides a quick overview about SOXS features.

Note:

Though the screen-shots in this manual are taken from Outlook 2013, SOXS supports Office 2010, Office 2013, Office 2016, Windows 7, Windows 8, Windows 10, SharePoint 2010, SharePoint 2013, SharePoint 2016 in every combination.

WORK WITH THE SOXS CLIENT

SOXS allows for fast and comfortable upload of emails and their attachments into SharePoint.

In that course, SOXS also stores the attachments of the emails as files in the library and also unzips ZIP-archives.

All emails and attachments are automatically tagged with the envelope-data of the email (From, To, etc.).

The SOXS-Client is an add-in for Outlook, which will automatically be started when you start Outlook.

The SOXS Client has a window, the SOXS-Explorer, which you can switch on and off in the SOXS toolbar.

In Outlook 2007 you'll find the SOXS icon in the tab *add-in*.

In Outlook 2010, 2013 and 2016, SOXS has its own command ribbon, in which you can find all settings for SOXS.

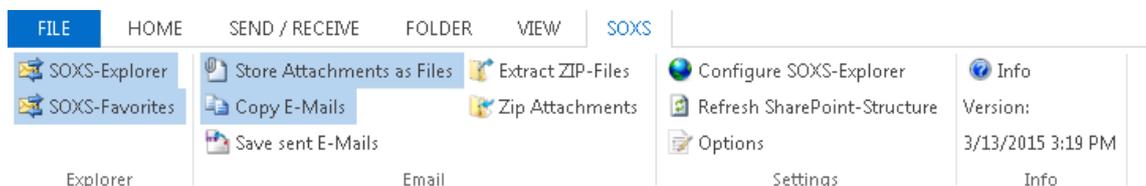


Figure 1: SOXS Ribbon in Outlook 2013

SOXS is active even if the SOXS Explorer is hidden. You do not need to have the SOXS Explorer visible in order to work with SOXS.

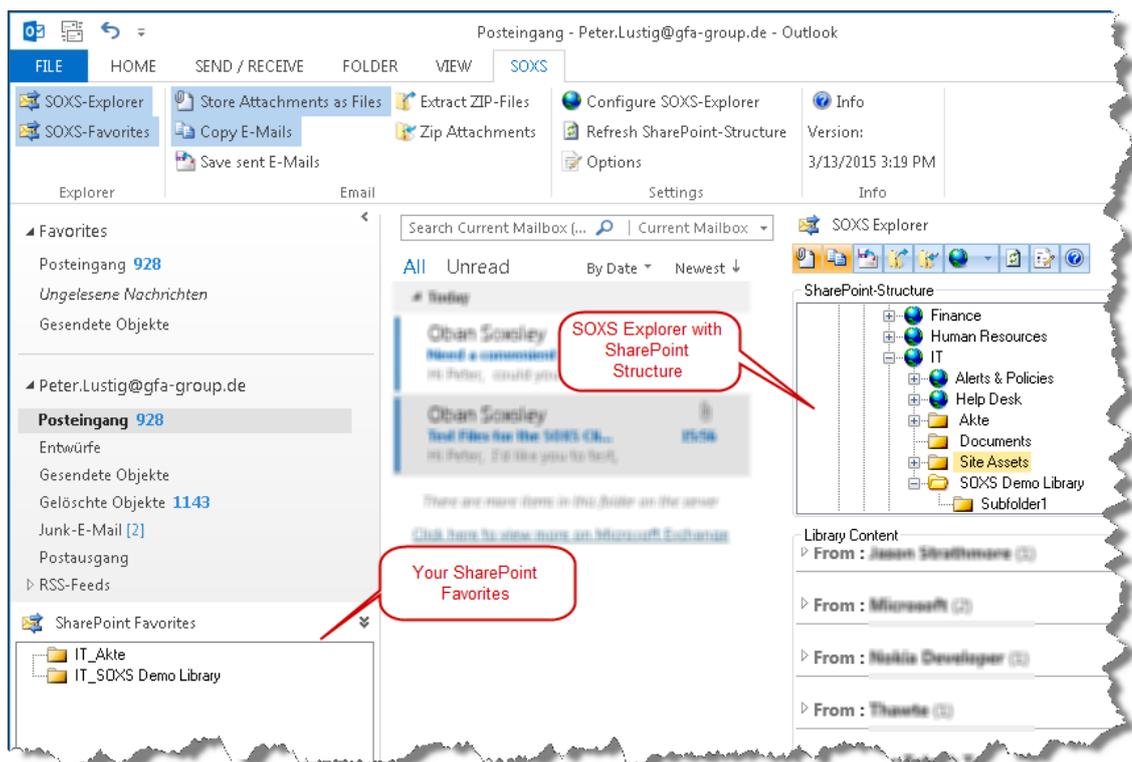


Figure 2: SOXS in Outlook 2013

Use the SOXS Explorer to:

- link a favorite library with Outlook,
- upload files from a file share to save in Outlook (see Drag & Drop files from file shares to SharePoint),
- attach files from SharePoint Using Drag & Drop,
- change settings of SOXS (see. The Client Configuration Options)

Link a SharePoint Library with Outlook (Create a SharePoint Favorite)

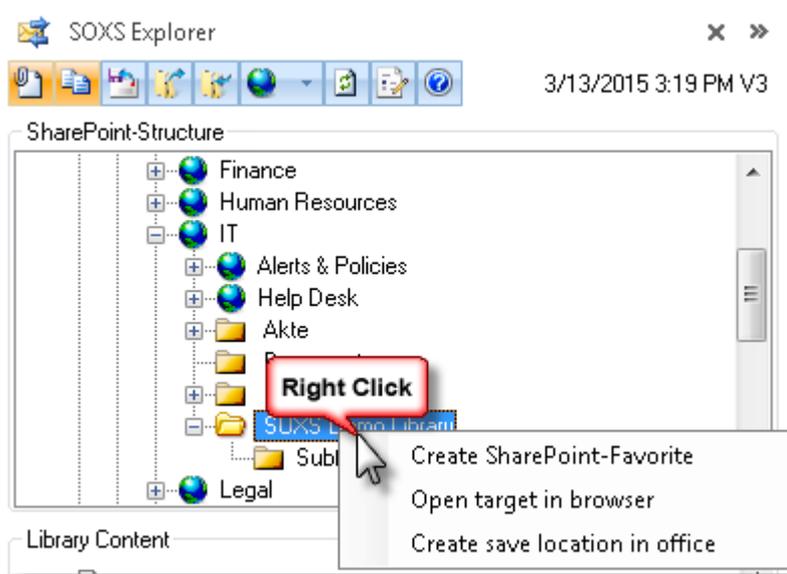
One of SOXS most important features is the easy upload of emails into SharePoint libraries. In order to speed that up even more, you can create SharePoint favorites, which appear as a folder in your Outlook navigation.

Use SharePoint Favorites to:

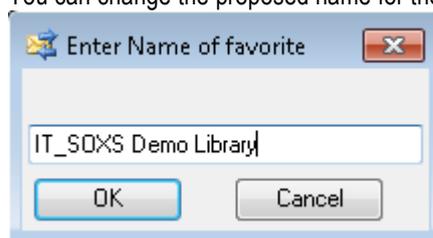
- quickly store Mails using Drag & Drop to frequently used libraries,
- quickly toggle between your Inbox and your most important SharePoint Sites, without leaving Outlook.

To set up a SharePoint favorite, proceed as follows:

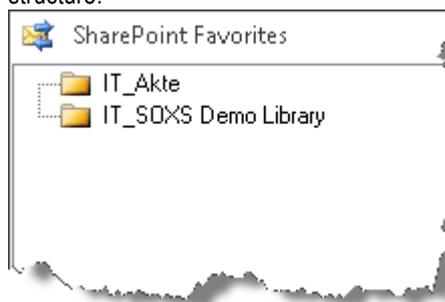
1. Switch on the SOXS Explorer (see above).
2. Navigate to the library, for which you want to create a SharePoint favorite.



3. Right click on the library and select *Outlook create favorites*.
4. You can change the proposed name for the favorite.



5. You'll find your SharePoint favorite in the window *SharePoint Favorites* below your Outlook folder structure.



The SharePoint favorites serve as a destination for Drag & Drop operations (see below). In addition, you can use the favorites to navigate to your most important SharePoint sites with just one click and the same back again.

Now you have your most important SharePoint Sites in just one click distance from Outlook!

Save emails in a SharePoint library

The fastest way to save emails in SharePoint is Drag & Drop to the SharePoint Favorite (see above):

1. Highlight one or more emails from your inbox and drag them with the mouse to a SharePoint favorite.
2. Enter the attributes for tagging in the Upload form if necessary. (see below).

If the email contains attachments, they will automatically be extracted and tagged with the meta data, which you have specified in the SOXS Upload form.

If the library, you have selected, contains columns for Email meta data (From, To, Subject, etc.), they are automatically populated by SOXS (Tip: A template for libraries is supplied with SOXS, which already provides a content type for email, columns for email metadata, as well as some views for emails).

SOXS names the email files automatically with file names consisting of the subject of the email and the date received. This will ensure unique names for the emails.

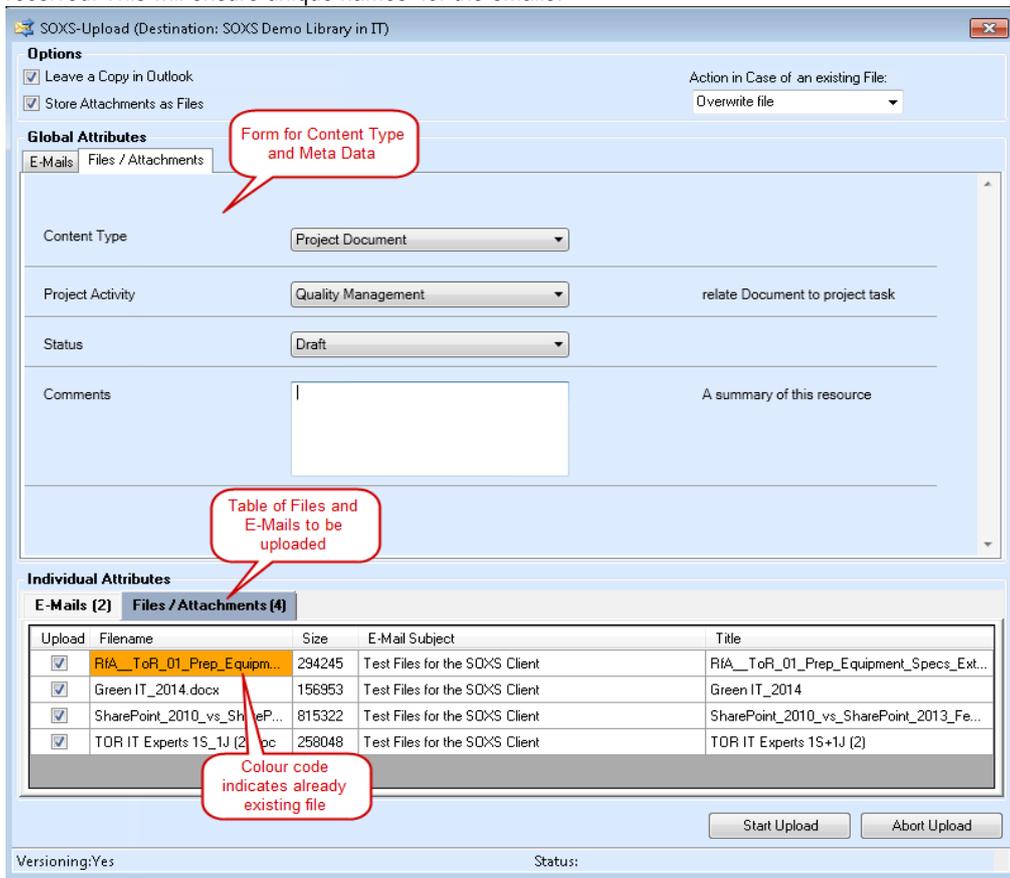


Figure 3: The Upload Form in SOXS 2013

Content Types and Custom Attributes - the Upload Form

If content types are enabled in the library in which you store your emails, you can choose from these in the Upload form.

If the content type Email exists in the Library, it will be automatically selected for emails, but you can also assign a different content type, if you like. (Note: The SOXS-Installation package contains an example of a library with an email content type).

You can also tag your files with custom attributes within the upload form.

The attachments of an email can be tagged with a different content type, than the email.

SharePoint sites are workspaces for teams. Therefore, it may occur that duplicate files are uploaded.

If you want to upload a file that already exists in the library, you will be informed by a color code prior and after the upload:

COLOR-CODE	IMPORTANCE
White	File does not exist yet
Orange	File already exists (is already before the upload)
Yellow	File was overwritten or create a new version or not uploaded (depending on pre-selection in the Upload Form).
Green	File has been successfully uploaded
Red	File was not uploaded or an error occurred.

You can specify in the Upload Form, what SOXS shall do, if a file already exists.

The following options are available:

- Create New Version (default for libraries with versioning activated)
- Overwrite
- Upload with a modified file name
- Do not upload

Dealing with zipped attachments

Emails often contain zipped attachments. SOXS can automatically unzip attachments on request.

You can switch the zip-function in the SOXS Explorer on and off.

Enable or disable the corresponding switch in the toolbar of the SOXS-explorer  or in the ribbon  Extract ZIP-Files

If the zip-file contains a folder structure, SOXS behaves as follows:

- If the library allows the use of folders, SOXS will create the folder structure of the ZIP file in the library.
- If the Library does not allow the use of folders, SOXS will store all files in the Library without folder.
- If files with the same file names occur in different folders of the zip-file, these will be placed in the library with a sequential numbering.

Using Drag & Drop to attach Files from SharePoint to an email

Out-of-the-box SharePoint allows sending of files as a link only. Since the email recipients outside of an organization usually do not have access to your SharePoint farm, SharePoint is missing an easy-to-use function to send files.

Hence, SOXS allows you to attach files to email messages via Drag & Drop.

To do this, use the SOXS-*attachments* drop-off space in the lower area of the email form.

To attach a file to an email, do as follows:

1. Navigate to the library, in which the file is located. You can do this by using either the Internet Explorer or the SOXS Explorer.
2. Create a new Email (turn on the programs in the windowed mode if necessary, in order to see the source and destination on the screen at the same time.)
3. Drag and drop the file into the field SOXS-*attachments* in the lower area of the email-Form,
4. The file is now attached to an email as an attachment.

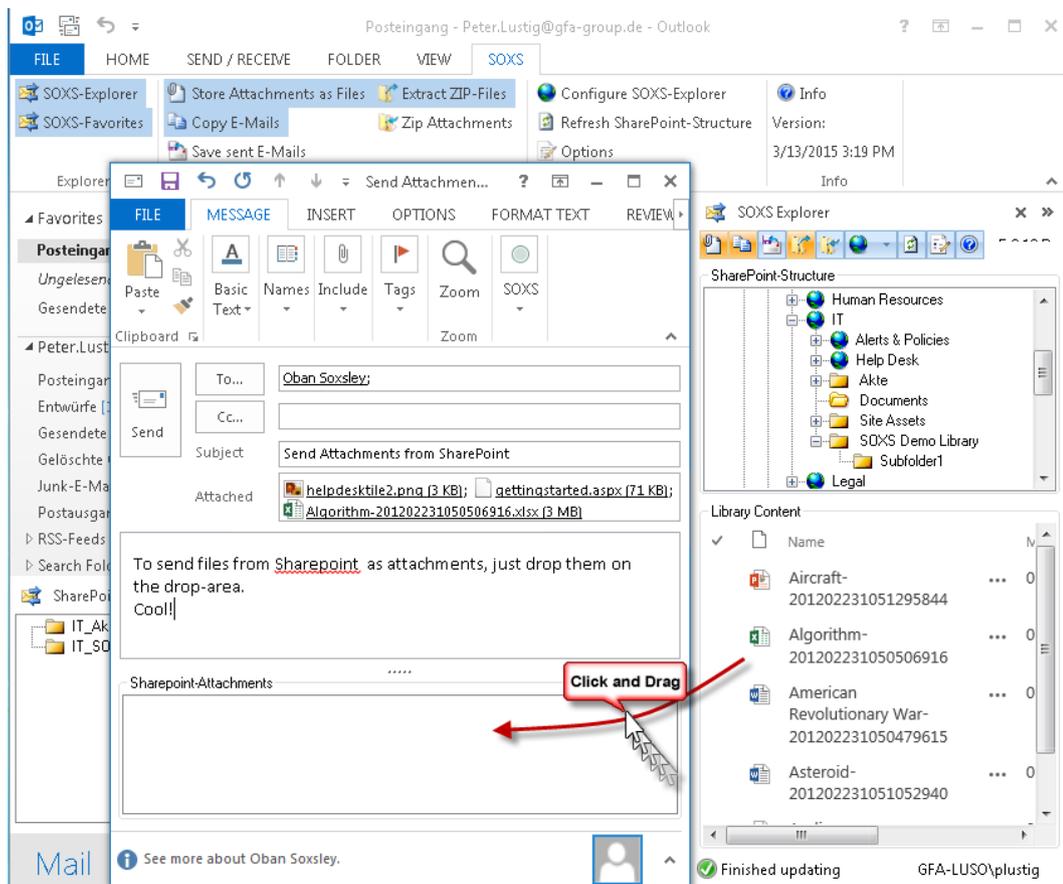


Figure 4: Add an Attachment

Note the following differences:

- When you drag a file into the area of the email-body, only a **link** to the file in the email will be inserted.
- When you drag a file into the field SOXS-*attachments*, the **file** will be attached to the email.

Store sent emails in SharePoint

In cases you also want to store sent emails in SharePoint, SOXS supports this by sending a copy of an outbound email to the library you specify

You can choose to be prompted to save in SharePoint when sending an email.

To do this, select the corresponding switch or  in the Settings menu for general setting, or **emails, Save sent email** for individual setting for each email.

After you've sent an email, a dialog box will prompt you to choose one of your SharePoint favorites to store the copy. Alternatively, you can select any library from the SharePoint Explorer.

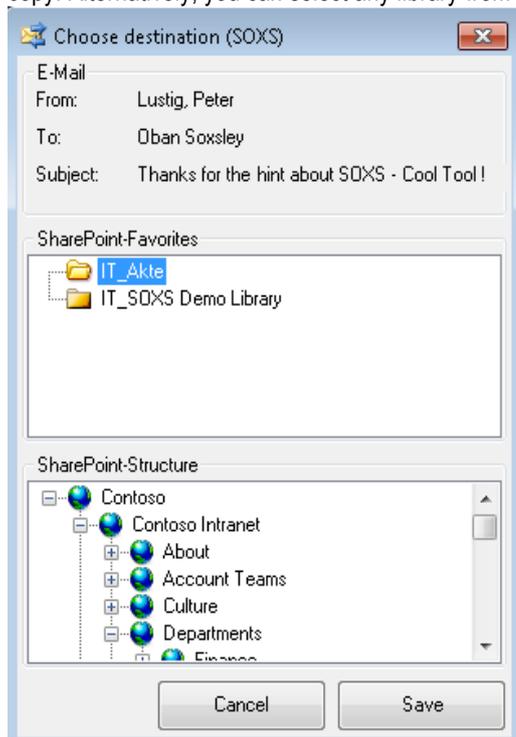


Figure 5: Select sent email location.

Note:

- If you choose to not to save in the Save dialog box, your message will be sent anyways.
- Your outbound emails will be stored in the Sent folder in Outlook, if this is set, regardless of the settings in SOXS.

Drag & Drop files from file shares to SharePoint

You can also use SOXS to upload files from your desktop or file shares into SharePoint libraries.

To do this, follow these steps:

1. If necessary switch Outlook from full screen to windowed mode.
2. In Windows Explorer, navigate to the files which you want to copy to SharePoint.
3. Drag the files by Drag & Drop onto your SharePoint favorite (or the desired SharePoint library in the SOXS Explorer, if you haven't set it up as a favorite).
4. Tag your files using the Upload Form.

This feature is unique to SOXS! Microsoft does not provide any means to upload and simultaneously tag multiple files.

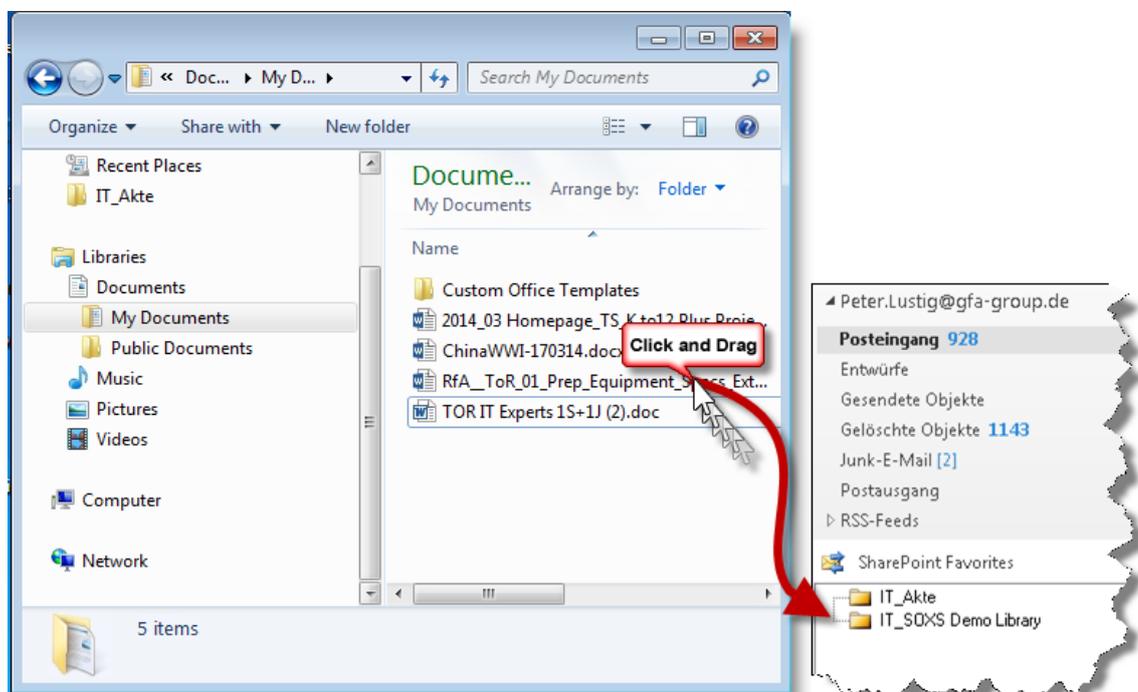


Figure 6: Upload files from Windows Explorer to SharePoint with SOXS.

The Client Configuration Options

You can switch the most important settings in the toolbar of the SOXS Explorer or in the SOXS Ribbon to set SOXS's default behavior according to your needs.



Figure 7: The toolbar of the SOXS-Explorer.

The following configuration options are available:

Settings, email, attachments extract 	<p>When enabled, attachments will be automatically extracted from an email and saved in the library as a file.</p> <p>This default setting can be changed individually in the Upload Form.</p>
Settings, email, email copy 	<p>If enabled, an email is copied during the upload to a library. A copy of the email remains in the mailbox and is tagged with an icon , as well as a note in the email-Body, to indicate, that the email is already stored in SharePoint.</p> <p>This default setting can be changed individually in the Upload Form.</p>
Settings, email, sent email store 	<p>When enabled, a sent email will be copied to a library.</p>
Settings, email, zip files unzip 	<p>When enabled, zipped attachments will be automatically unzipped.</p>
Settings, email, attachments in ZIP-files packing 	<p>When enabled, file attachments will be automatically zipped, when sending mails. The file name of the zip-file will be automatically created from the subject and the date.</p>
Settings, Administration, configure Web Applications 	<p>The links to SharePoint-Web applications, which the SOXS-Explorer shall display, are specified here.</p> <p>This is typically set during the installation by your administrator.</p>
Settings, SharePoint structure automatically update	<p>At regular intervals the list of the sites and libraries in the SOXS-explorer will be automatically updated</p>
Settings, SharePoint structure, node status SAVE	<p>When enabled, SOXS “remembers” which nodes in the Tree-View were expanded or collapsed.</p>
Settings, SharePoint structure, only lists with write permissions	<p>When enabled, libraries, for which the user has no write permission, will be hidden.</p>
Settings, files, attributes and content type queries	<p>When enabled, the Upload Form also appears when uploading files from the desktop or from file shares.</p>
Libraries Update 	<p>Performs an immediate update of the list of the sites and libraries in the SOXS-explorer.</p> <p>Note: SOXS updates the list automatically at regular intervals.</p>

INSTALLATION

The intended audiences of this section are administrators, who install the server and client components of SOXS.

Supported Systems

Outlook add-in:

- Microsoft® Windows 7, Microsoft® Windows 8, Microsoft® Windows 8.1
- Microsoft Outlook 2007
- Microsoft® Outlook® 2010 32-bit and 64-Bit
- Microsoft® Outlook® 2013 32-bit and 64-Bit
- Microsoft® Outlook® 2016 32-bit and 64-Bit
-

Web service:

- Microsoft Windows Server 2008 (64-bit)
- Microsoft Windows Server 2008 R2 (64-bit)
- Microsoft Windows Server 2012 (64-bit)
- Microsoft Windows Server 2012 R2 (64-bit)
- Microsoft SharePoint Foundation 2010
- Microsoft SharePoint Server 2010
- Microsoft SharePoint Foundation 2013
- Microsoft SharePoint Server 2013
- Microsoft SharePoint Server 2016

Note: SharePoint 2007 is no longer supported by SOXS.

Installation requirements for the SharePoint Web service

The following products should be installed on the SharePoint Server:

- .NET Framework 3.5 SP1¹
- Windows Installer 3.1²

If these products are not present, they will be downloaded and installed automatically from the Internet.

Of course, valid license or a demo license is required for the installation.

Installation requirements for the SOXS Client (Outlook add-in)

Microsoft Outlook 2007, Outlook 2010, Outlook 2013 or Outlook 2016 must be installed on the computer.

The following products should be installed on the computer (otherwise they will be downloaded from the Internet):

¹ <http://www.microsoft.com/download/en/details.aspx?id=22>

² <http://www.microsoft.com/download/en/details.aspx?id=25>

- .NET Framework 3.5 SP1³
- Windows Installer 3.1⁴
- Microsoft Visual Studio 2010 Report Viewer⁵

Installing the Server Components

Two components need to be installed on all SharePoint Web-Front-End servers (WFE):

1. The Web Service Solution (here are also known as a Web service in short form)
2. The Windows Service.

The **Web service** accepts requests from the Outlook add-in. It gathers the structure of SharePoint sites and libraries on client request (if the Windows Service is not installed), uploads files and checks the license and CALs. The **Windows Service** creates cache files from the structure of the SharePoint Site-Collections and provides them to the SOXS-clients (The Windows Service is optional but recommended when using more than 30 SOXS-Clients).

Installation of the Web Services

There are two ways to install the Web service.

- a. The first option is the "Setup.exe". This method automatically downloads missing software requirements from the Internet.
- b. The second option is "SOXSServerSetup.msi". With this method, **no components** will be downloaded from the Internet. If one of the software requirements is not met, the installation is canceled.

The Web service must be **installed on each** WFE of a SharePoint farm, but needs to be published on only one of these servers.



Notes:

- The SOXS Web service must be installed on SharePoint Web front-end servers (WFE), not on an application server.
- The installation files of the Web service must be locally available on the **WFE** computer; otherwise problems with permissions may occur.
- The installation must be carried out as an Administrator. To do this, please click on the installation file with the right mouse button and choose "Run as Administrator (the account for the installation must have Administrator privileges for the SharePoint server, as well as for the server on which SharePoint is installed).

Start the installation by double-clicking on SOXSServerSetup.msi or setup.exe.

³ <http://www.microsoft.com/download/en/details.aspx?id=22>

⁴ <http://www.microsoft.com/download/en/details.aspx?id=25>

⁵ <http://www.microsoft.com/download/en/details.aspx?id=6442>

You can use the option in the installation dialog **add and deploy Web Service-Solution** to choose whether the Web Service-Solution should also be **published** in the course of the installation. If this option is selected, the Web Service-Solution will be published during installation and the Internet Information Service (IIS) will be restarted.

Select this option if you have only one Web Front End (WFE) server.

If you have multiple Web front-end servers, you should choose this option only on one WFE; otherwise each installation will cause an IIS-reset.⁶

In the following dialog, you can specify the license file. If you still do not have a license file, the dialog can be canceled and the installation continues.

The installation program now installs the necessary files for the Web service on the computer.

The Web Service will be installed in the ISAPI-directory of SharePoint, from which it is accessible for all Site-Collections / Sites on the web frontend (e.g. : http://sp.gfa-syscom.de/Site-Collection1/_vti_bin/SOXSWebService.asmx).

Installing the Windows Services

The Windows Service creates cache files from the structure of the SharePoint Site-Collections and provides them to the SOXS-clients. This speeds up the client requests and lowers the load to the SharePoint server.

The Windows Service also has two options for installation, similar to the Web Service. With the "Setup.exe" the software requirements will also be downloaded from the Internet automatically whereas with the SOXSWindowsServiceSetup.msi the software requirements need to be installed manually first.

Note:



- The Windows service must be installed on a SharePoint Web front-end server (not on an application server).
- Only one Windows service needs to be installed per SharePoint farm, even if you have more than one WFE.
- The installation files of the Web service must be locally available on the **SharePoint Web front-end** computer; otherwise problems with permissions may occur.
- The installation must be carried out as an Administrator. To do this click on the installation file with the right mouse button and select "Run as Administrator " (the account for the installation must have administrator privileges for the server on which SharePoint is installed).
- If the server has an older version of the Windows Services installed, please uninstall this before you start the installation.

⁶ Experienced SharePoint administrators may also choose to publish manually to the SharePoint-Server. The Web Service-Solution is located in "%ProgramFiles%\GFA SYSCOM GmbH\SOXS\" and is called "SYSCOM.SOXS.SOXSWebService.wsp".

After installing the files, you will be prompted to provide the credentials, the Windows service shall use. The credentials specified, need to have SharePoint administrator privileges.

A link to the configuration utility of the Windows Services will be added to the Start menu in the section *All programs,- GFA SYSCOM GmbH - SOXS*".

Configuring the Windows Services

Start the configuration utility from *Start Menu, All Programs, GFA SYSCOM GmbH - SOXS - Windows Service Configuration*" on the WFE.

In "*Cached Web Applications*" you can specify the URLs of the Web-Applications or Site-Collections, for which the Windows Service shall gather the site structures.

FIELD	CONTENTS
Name	Any name for the URL
URL	The URL of a Web-Application or Site-Collection. All sub sites and libraries based on the specified URL will be cached.
Active	Switch the caching for individual URLs on and off.

The "*Cache interval*" specifies, how often the cache files will be updated.

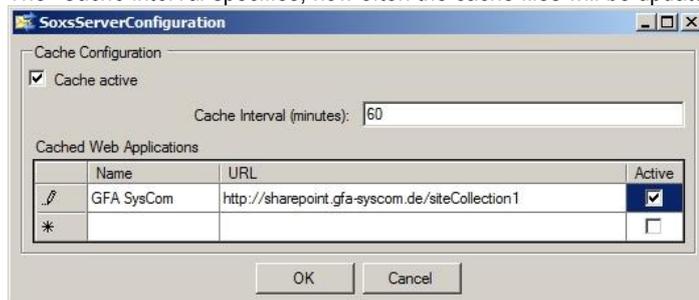


Figure 8 The Windows Service Configuration dialog

This completes the installation of the server components.

License management

You can test SOXS for a period of 14 days, with one CAL (Client Access License).

After the trial period a license must be purchased and activated.

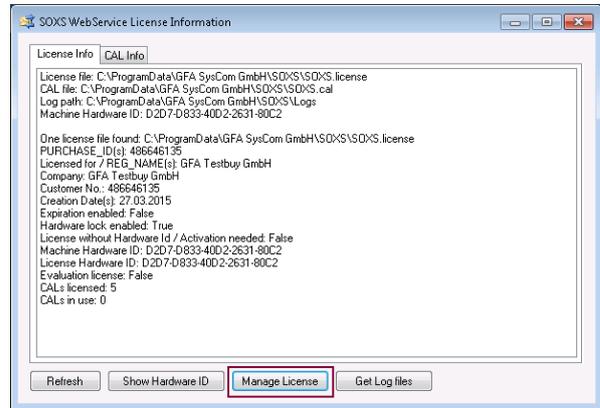
The activation binds the license to your server's hardware. Changes to the hardware (i.e. change NIC, add RAM) might require you to repeat the activation of the license.

You can purchase and download a SOXS license form our website at https://www.gfa-syscom.de/sharepoint-email-outlook/Order-SOXS_3735942.html

After purchase you need to activate the license.

Proceed as follows to activate and install a license:

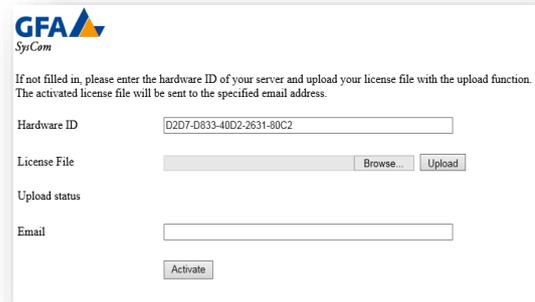
1. Log on to the server on which the SOXS-server component is installed.
2. Start the SOXS-license management in the Start menu under "GFA SYSCOM GmbH, SOXS, SOXS Licenses overview".



3. In the License Management select "Manage License" and then "go to Online Activation Page".



4. On the Activation Page enter the e-mail address to which the activated license shall be sent to. Upload the purchased license with the upload function (the Hardware ID has already been with the Hardware ID of your server) and click "Activate". The activated license file will then be sent to the specified e-mail address.



5. Add the activated license to your server. Use *Install new or replace license* in the License Manager



This completes the activation and installation of the license. If you have purchased an additional license, you can use the function "Add additional license / CALs" to add the license to the existing ones.

If your SharePoint Server does not have access to the Internet, you can use the online product activation from another PC in the URL. <https://productactivation.gfa-syscom.de/licensing>

Please don't forget to note down the Hardware ID of your server prior to that (s. above).

Installation of the SOXS-Client (Outlook add-in)

The Outlook add-in can be installed in two different ways:

- a. With the "Setup.exe" SOXS will be installed for the user currently logged on. If the software prerequisites are not already installed, they will be downloaded from the Internet and installed automatically.
- b. With the "SOXSSetup.msi" it is possible to distribute the add-in automatically by Group Policy to the computers.⁷ With the "SOXSSetup.msi" no components are loaded from the Internet. If the software requirements are not installed, the installation will be canceled.

If you need to install only a few SOXS-clients, we recommend the comfortable and easy variant A. If you have a large number of SOXS-clients, we recommend the variant B for centralized software distribution.

Configuration of the SOXS Clients

You specify which SharePoint Site-Collections are to be displayed in the *SharePoint Explorer Tree View* in "Settings - Administration - Web applications".

Please provide the following information for each site collection or web application you want to be displayed in the SOXS Explorer TreeView:

Description	The name of the top level node in the TreeView (preferred the name of the Site-Collection)
URL	The URL of the Site-Collection (e.g. "http://sp.gfa-syscom.de/ Site-Collection 1 ")
Webservice-Url	The URL to SOXSWebService (e.g. "http://sp.gfa-syscom.de/Site-Collection 1/_vti_bin/SOXSWebService.asmx")
Note	A comment about this configuration
Active	Here you can toggle the display of Site-Collection structure on an off

After changing the configuration, you need to update the SharePoint Explorer TreeView by clicking the refresh button .

Prepare Document libraries to store emails

The document libraries in which you want to save emails, need to have management of content types enabled and a content type named *Email* present.

SOXS automatically populates columns for the envelop data of an Email (To, From, etc) if the corresponding columns exist in the library.

Note: We provide a library template, which already provides a content type for email, columns for email meta data, as well as some views for emails. The installation of a template is described in the next section.



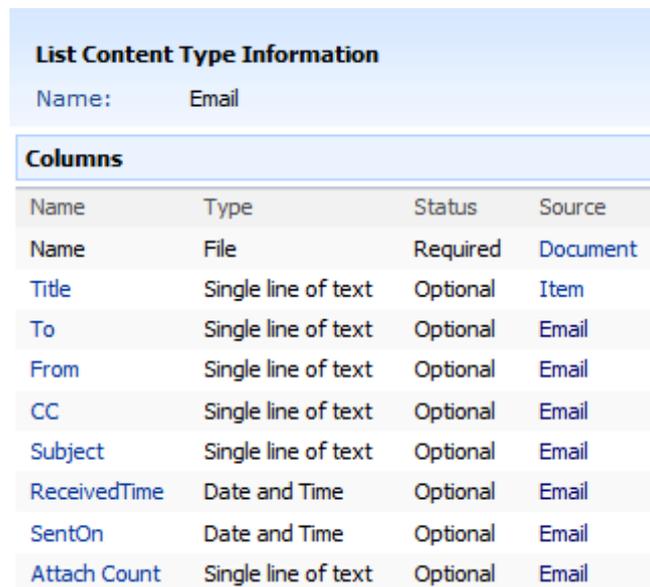
⁷ Knowledge on the application of group policies are provided here.

The following table lists the columns, which need to be present in a library in order to use the auto email metadata population feature of SOXS:

COLUMN NAME	
Title	The title of the SOXS email item is automatically created from the subject and the received time of the email
To	The recipient of the email
From	The sender of the email
CC	The other recipients of the email
Subject	The subject of the Email
ReceivedTime	The receipt of the email
Sent on	The transmission time of the email
Attach Count	The number of attachments

Note: The column names must have exactly the above notation during the creation of the columns. You may rename the columns afterwards, though.

We recommend that you create a content type with the name "email", which includes at least the columns listed above. The screenshot below shows an example for this content type:



List Content Type Information			
Name:	Email		
Columns			
Name	Type	Status	Source
Name	File	Required	Document
Title	Single line of text	Optional	Item
To	Single line of text	Optional	Email
From	Single line of text	Optional	Email
CC	Single line of text	Optional	Email
Subject	Single line of text	Optional	Email
ReceivedTime	Date and Time	Optional	Email
SentOn	Date and Time	Optional	Email
Attach Count	Single line of text	Optional	Email

Figure 9 Example for content type Email

Installation of the Library Template

We provide a document library template, which already contains the content type Email and the necessary columns as well as some views for emails. You can download the template from our website, where you downloaded the SOXS installation files.

The template is a STP-File. In order to make the template available to users, simply add it to the site collection template gallery:

1. Navigate to the top level site of the site collection
2. Choose *Site Settings, All Site Settings*
3. In the section *Galleries* choose *List Template*
4. Choose *Upload* and specify the template file.

The template is now available to all sites of this site collection.

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For more information on the GFA SYSCOM GmbH visit our website www.gfa-syscom.de .

A request for quotation or to acquire a license, send an email to sales@gfa-syscom.de.

If you have technical questions or problems you may contact SOXS-support@gfa-syscom.de .

The GFA SYSCOM GmbH is a certified Microsoft partner established in Hamburg.

We develop applications and provide consultancy services to support team collaboration, document management and knowledge management based on Microsoft SharePoint and Microsoft CRM

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