

ArtfulBits Email Web Part

for Microsoft® SharePoint®

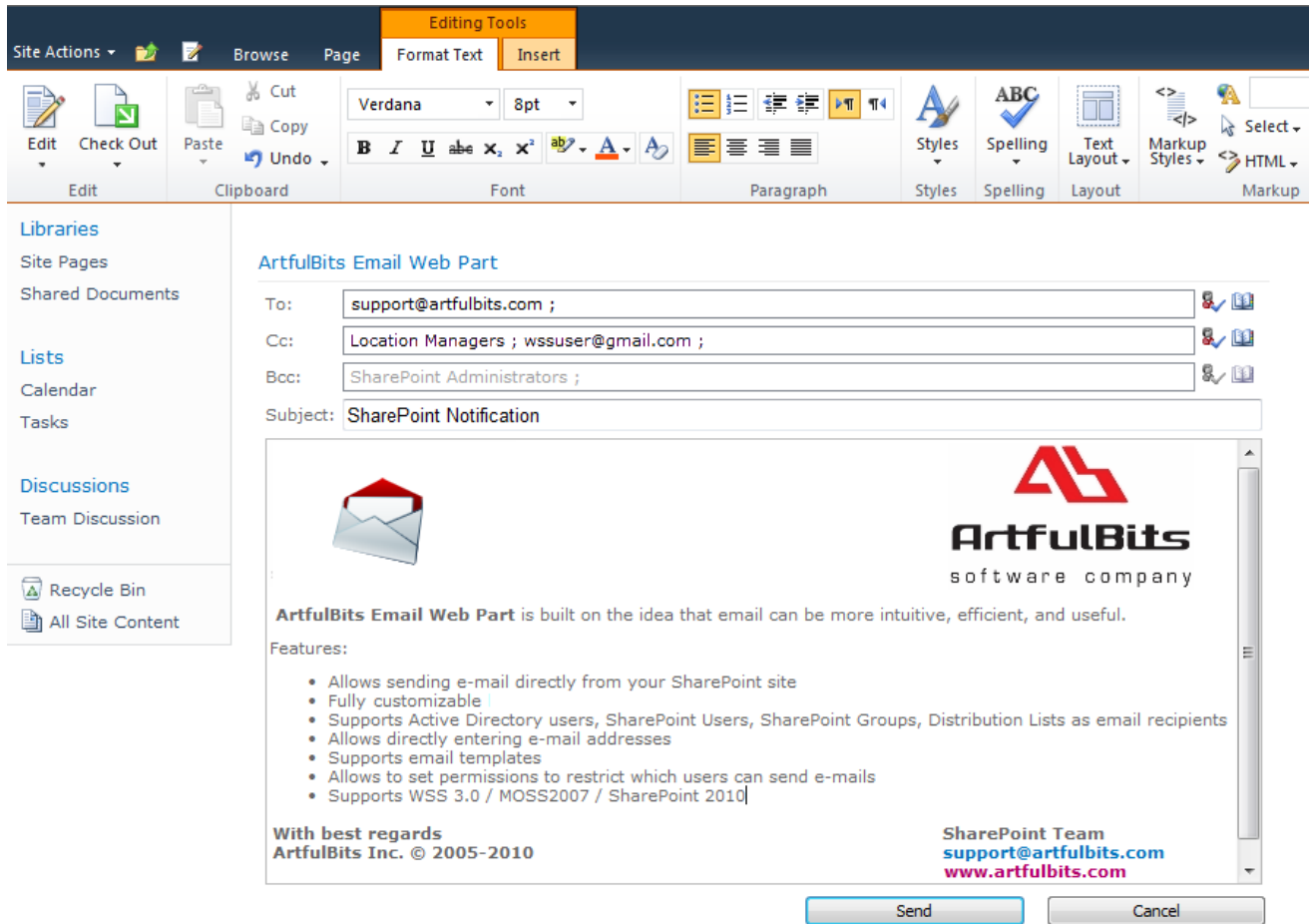


User Guide

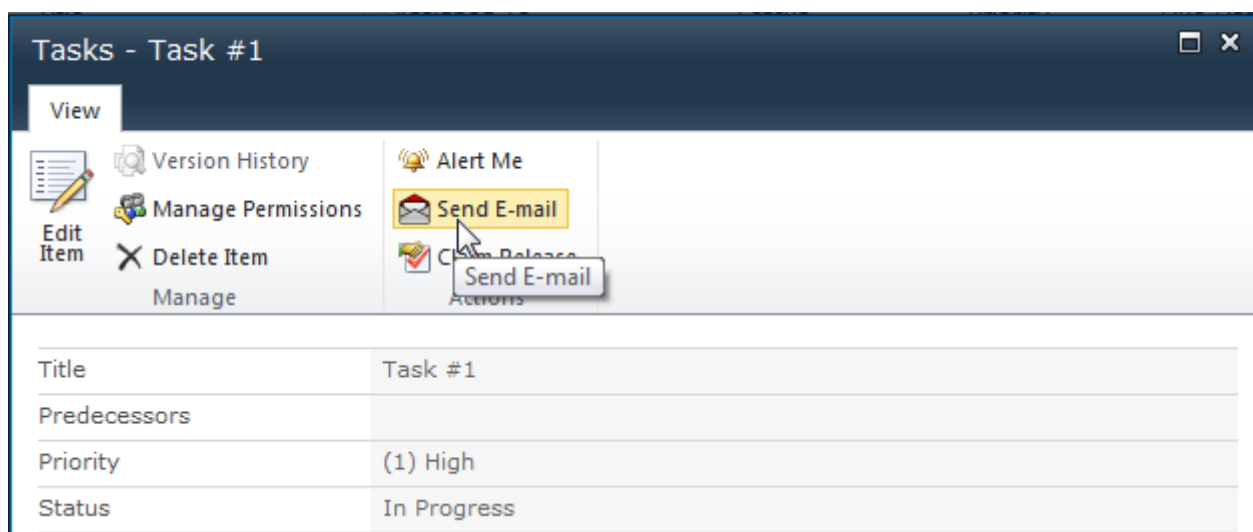
Overview	2
Feature List	3
Why ArtfulBits Email Web Part?	3
How to Use	4
How to Use Email Web Part	4
Enabling to Send E-mail directly from List Item.....	7
Release Notes	9
See Also	10
Remarks.....	11

Overview

ArtfulBits Email Web Part allows sending e-mail messages directly from SharePoint site. You can notify task assigned users, send gratitude or just send regular e-mail message, etc.



ArtfulBits E-mail Web Part provides useful ability to send e-mail directly from List Item. E-mail fields To, Subject and body can be auto populated with column item values.



Feature List

Feature	SharePoint 2007	SharePoint 2010
Send e-mail directly from SharePoint site	✓	✓
Add actions to send e-mail directly from List Item	✓	✓
Auto-populated To, Subject and body with item column values	✓	✓
Supports Active Directory users, SharePoint users, SharePoint groups, Distribution Lists as e-mail recipients	✓	✓
Supports direct e-mail addresses	✓	✓
Supports e-mail templates	✓	✓
Permissions management (restrict users to send e-mails)	✓	✓
User friendly UI (Outlook like pickers for To, Cc, Bcc e-mail boxes, html message editor)	✓	✓
Customizable e-mail from field	✓	✓
Language pack support (desired localization could be added by request)	✓	✓

Why ArtfulBits Email Web Part?

ArtfulBits Email Web Part is a simple to use and powerful tool that provides e-mail sending functionality directly from SharePoint web site. Web Part is fully customizable providing ability to configure it to your personal needs.

How to Use

How to Use Email Web Part

ArtfulBits Email Web Part has intuitive user-friendly interface. Create new mail message by clicking email web part image:



Specify necessary fields: choose recipients (To, Cc, Bcc) using users' picker (some fields can be disabled by site administrator), type e-mail subject and e-mail message body (html or simple text):

The screenshot displays the 'ArtfulBits Email Web Part' interface within a SharePoint environment. At the top, there is a ribbon with 'Editing Tools' selected, containing 'Format Text' and 'Insert' tabs. Below the ribbon are various toolbars for editing, clipboard, font, paragraph, styles, spelling, layout, and markup. On the left side, there is a navigation pane with sections for 'Libraries', 'Lists', and 'Discussions'. The main content area shows the email composition form with the following fields:

- To: support@artfulbits.com ;
- Cc: Location Managers ; wssuser@gmail.com ;
- Bcc: SharePoint Administrators ;
- Subject: SharePoint Notification

The email body contains the ArtfulBits logo and the text: 'ArtfulBits software company'. Below this, it states: 'ArtfulBits Email Web Part is built on the idea that email can be more intuitive, efficient, and useful.' A list of features follows:

- Allows sending e-mail directly from your SharePoint site
- Fully customizable
- Supports Active Directory users, SharePoint Users, SharePoint Groups, Distribution Lists as email recipients
- Allows directly entering e-mail addresses
- Supports email templates
- Allows to set permissions to restrict which users can send e-mails
- Supports WSS 3.0 / MOSS2007 / SharePoint 2010

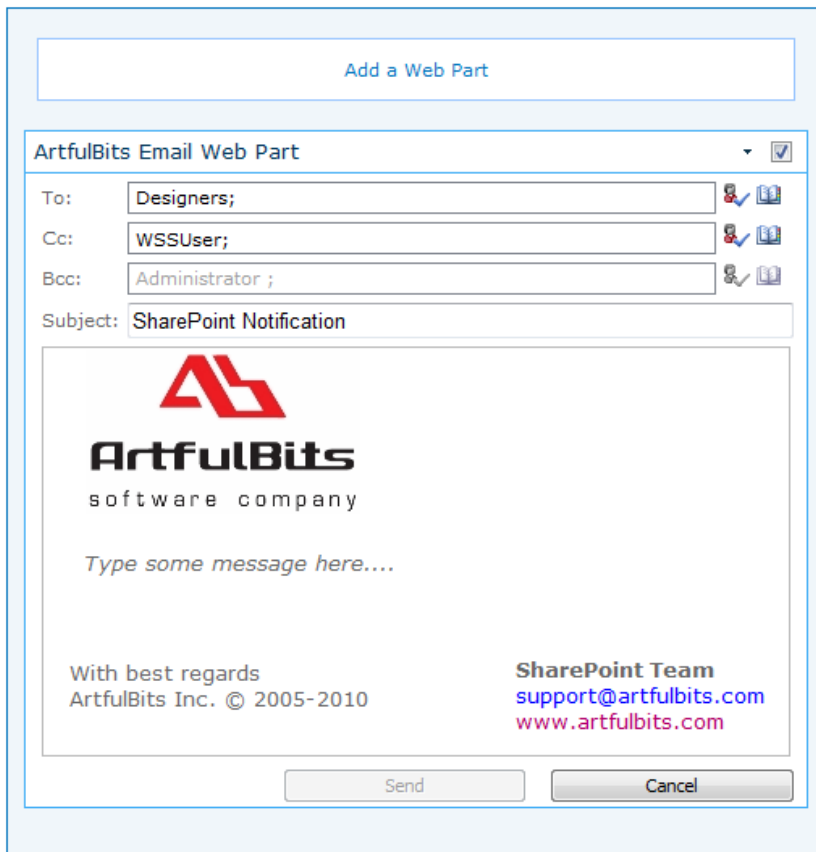
At the bottom of the email body, it says: 'With best regards ArtfulBits Inc. © 2005-2010'. On the right side, it says: 'SharePoint Team support@artfulbits.com www.artfulbits.com'. At the very bottom, there are 'Send' and 'Cancel' buttons.

Click "Send" button. Following view will appear after successful e-mail sending:

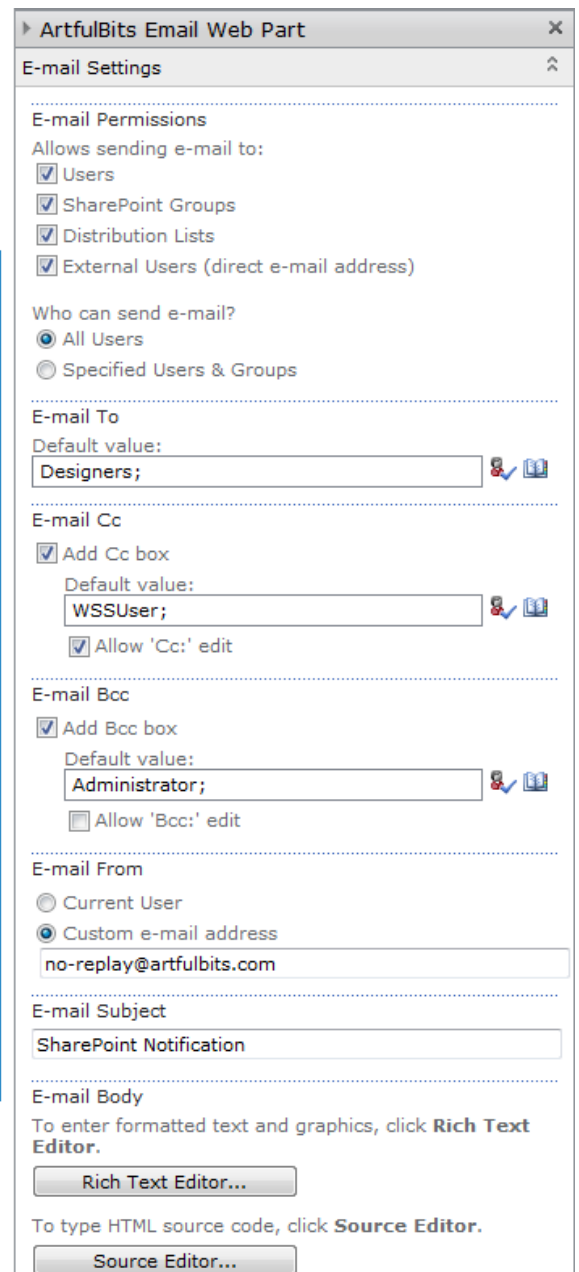


To send e-mail, make sure that outgoing e-mail settings are configured correctly for the server (open SharePoint Central Administration → Operations → Outgoing E-Mail Settings and check SMTP mail server).

ArtfulBits Email Web Part settings view:



The image shows the settings view for the ArtfulBits Email Web Part. It features a header "Add a Web Part" and a main section titled "ArtfulBits Email Web Part". The main section contains fields for "To:", "Cc:", "Bcc:", and "Subject:". The "To:" field is filled with "Designers;", "Cc:" with "WSSUser;", and "Bcc:" with "Administrator ;". The "Subject:" field is filled with "SharePoint Notification". Below these fields is a large text area containing the ArtfulBits logo, the text "ArtfulBits software company", a placeholder "Type some message here...", and a signature block for the "SharePoint Team" with contact information: "support@artfulbits.com" and "www.artfulbits.com". At the bottom of the settings view are "Send" and "Cancel" buttons.



The image shows the "ArtfulBits Email Web Part" settings dialog, specifically the "E-mail Settings" tab. The dialog is titled "ArtfulBits Email Web Part" and has a close button (X) in the top right corner. The "E-mail Settings" section is expanded, showing various configuration options. The "E-mail Permissions" section includes "Allows sending e-mail to:" with checkboxes for "Users", "SharePoint Groups", "Distribution Lists", and "External Users (direct e-mail address)", all of which are checked. The "Who can send e-mail?" section has radio buttons for "All Users" (selected) and "Specified Users & Groups". The "E-mail To" section has a "Default value:" field filled with "Designers;". The "E-mail Cc" section has a checked "Add Cc box" option, a "Default value:" field filled with "WSSUser;", and a checked "Allow 'Cc:' edit" option. The "E-mail Bcc" section has a checked "Add Bcc box" option, a "Default value:" field filled with "Administrator;", and an unchecked "Allow 'Bcc:' edit" option. The "E-mail From" section has radio buttons for "Current User" and "Custom e-mail address" (selected), with a text field filled with "no-replay@artfulbits.com". The "E-mail Subject" section has a text field filled with "SharePoint Notification". The "E-mail Body" section has instructions: "To enter formatted text and graphics, click Rich Text Editor." with a "Rich Text Editor..." button, and "To type HTML source code, click Source Editor." with a "Source Editor..." button.

Following settings are available:

- **E-mail Permissions:** specifies e-mail recipients' audience.

Possible options:

- *Users* (SharePoint and Active Directory users)
- *SharePoint Groups*
- *Distribution List*
- *External Users* (direct e-mail addresses are available)

You can also set permission for users, which can send e-mail (all or specified users and SharePoint Groups). If a user does not have permission to send, following image will be shown:

ArtfulBits Email Web Part



- **E-mail To, E-mail Cc and E-mail Bcc:** you can show/hide boxes, set default values for them and enable/disable editing for users
- **E-mail From** allows specifying e-mail from address (e-mail address or some text)
- **E-mail Subject** specifies default value for e-mail subject
- **E-mail Body** allows specifying e-mail message template. Rich Text Editor can be used to enter formatted text and graphics or Source Editor to type HTML source code
- **Default View** provides default view for Web Part (when page is opened). Possible options:
 - E-mail Web Part Image
 - New E-mail Form

Enabling to Send E-mail directly from List Item

To enable sending e-mail from custom List Item, navigate to List Settings page and select "E-mail settings" action under Communications tab:

The screenshot shows the SharePoint interface for the 'Tasks' list settings. The breadcrumb path is 'Email Demo > Tasks > List Settings'. On the left, there is a navigation pane with categories: Libraries (Site Pages, Shared Documents), Lists (Calendar, Tasks), and Discussions (Team Discussion). The main content area is titled 'List Information' and shows the list name 'Tasks' and its web address 'http://demo/email/Lists/Tasks/AllItems.aspx'. Below this, there are three tabs: 'General Settings', 'Permissions and Management', and 'Communications'. The 'Communications' tab is active, showing links for 'RSS settings' and 'E-mail settings', with a mouse cursor pointing to the latter.

In List E-mail Settings page select Yes under Enable e-mail features for this list. You can also specify to show or not "Send E-mail" action on Item Display Form and in Edit Item Menu in list view.

The screenshot displays the 'E-mail Settings' configuration page. It is divided into three main sections:

- Enable List E-mail Features:** A heading followed by the text 'Enabling e-mail features will add 'Send E-mail' action for list item.' Below this is a radio button group for 'Enable e-mail features for this list', with 'Yes' selected.
- "Send E-mail" Action Settings:** Two radio button groups. The first is for 'Show on Item Display Form' (selected 'Yes'). The second is for 'Show in Edit Item Menu in list view' (selected 'Yes').
- E-mail Permissions:** A heading followed by 'Specify e-mail permissions.' Below is a radio button group for 'Who can send e-mail?', with 'Specified Users & Groups' selected. A text box below contains the list: 'Administrator ; Approvers ; Hierarchy Managers ;' with a 'Save' icon to the right.

To auto populate e-mail To address check appropriate checkboxes against column names in Send To section, thus E-mail addresses of SharePoint Users and users from SharePoint Groups based on data from these checked columns will be put automatically in e-mail To box. You can also specify other Users, Groups, Active Directory Groups, Distribution Lists or custom e-mail addresses, that will be auto populated to e-mail To address box. Cc and Bcc boxes add ability to specify e-mail addresses similar to the above. Allow checkbox specifies whether user can edit certain e-mail box before sending e-mail.

Site Actions Browse

Editing Tools

Format Text Insert

Cut Copy Undo

Clipboard

Tahoma 8pt

B *I* U

Font

Paragraph

Styles

Spelling

Markup Styles

Select

HTML

Markup

E-mail Recipients

Specify e-mail recipients.

Send To

Users & Groups based on data from the following columns:

Created By

Modified By

Assigned To

Task Group

Add the following Users & Groups:

Allow 'To:' edit

E-mail Cc

Add Cc box

Allow 'Cc:' edit

E-mail Bcc

Add Bcc box

E-mail Content

You can use template fields in e-mail body and subject. The following is the list of supported fields: **[ID], [Title], [Modified], [Created], [Created By], [Modified By], [Predecessors], [Priority], [Status], [% Complete], [Assigned To], [Description], [Start Date], [Due Date]**

E-mail Subject

Allow 'Subject:' edit

E-mail Body

Task is assigned to You.
Please approve or denied this task.

Last Modified [Modified] by [Modified By]

Allow body edit

E-mail From

Please specified e-mail address of the sender.

E-mail From

Current User

Custom e-mail address

Save Cancel

E-mail Content section contains tools to customize e-mail Subject and e-mail body. You can use [Column Name] template to auto populate e-mail content with column item values. E-mail From allows to specify e-mail from address.

Release Notes

Version	Notes
v1.3 (June 01, 2011)	Improvements: <ul style="list-style-type: none">Added support for new licensing model (ArtfulBits License Manager v1.4)
v1.2 (February 10, 2011)	Improvements: <ul style="list-style-type: none">Added links to Attachments list itemAdded links to documents from Document Library
v1.11 (December 1, 2010)	Bugs Fixed: <ul style="list-style-type: none">Fixed template value expansion in e-mail Subject
v1.1 (November 2, 2010)	New Features: <ul style="list-style-type: none">Added ability to send e-mail from List ItemAuto populated e-mail To, Subject and body with column item values Improvements: <ul style="list-style-type: none">Improved e-mail look and feel
v1.0 (July 14, 2010)	Initial Release

See Also



[Cascaded Lookup Column](#)

Cascaded Lookup Column allows building relationship between parent and child columns, the data selected in one field will determine the options presented in another.



[Category Column](#)

Category Column allows tracking, organizing and grouping list items. Outlook 2007 approach for elements categorization, easy indicator color changing and using of advanced tooltip, provide a high professional component style.



[Column Data Adapter](#)

Column Data Adapter is an extension component providing ability to use ArtfulBits Columns in Microsoft Access forms, reports and Microsoft Excel.



[Column Permissions](#)

Column Permissions allows you to manage access to list content on column level. Permissions can be assigned for individual users and for SharePoint groups as well and are effective in forms and list views, as well as in the SharePoint Alerts, RSS, Datasheet and even during exporting to Excel and opening with Access.



[Cross-Site Lookup Column](#)

Use Cross-Site Lookup Column for getting data from any site within site collection. Component includes a powerful function of searching over lookup list. This function provides substring matching in selected column which is very useful for large lists (over 50-100 items).



[Discussion Column](#)

Need to organize well formatted conversation in the list item without enabling list versioning? Discussion Column is the right choice. Component allows entering rich text with formatting, images, tables, hyperlinks and other features.



[Follow-Up Column](#)

Follow-Up Column enables due date flags similar to Outlook follow-up functionality. Applying of flags to the list item allows adding of visual reminder in a natural way.



[Image Upload Column](#)

Quick and simple way of uploading pictures. Image Upload Column provides with ability to select a picture using file browsing dialog, upload and display it in the list view.



[KPI Column](#)

KPI (Key Performance Indicator) Column is simple graphical scorecards that can be used to evaluate business data against business goals. With this column you reduce risk to overlook information about the status of value.



[Link to Document Column](#)

Link to Document Column allows referencing files and folders placed at Document Library and provides easy and intuitive way to download files directly from column. Use this column to provide a browsing interface that allows users to browse to an object to link to instead of typing a URL.



Parent Selector Column

Parent Selector Column is used for organizing hierarchical relations in SharePoint list. Picker dialog allows choosing data from large lists. Standard Lookup column can be easily converted to Parent Selector column and vice versa.



Professional Calendar Web Part

Professional Calendar Web Part provides following key benefits: it allows combining events from different SharePoint Lists, from any SharePoint Site, in one Calendar view; allows specifying different color sets for different event sources; supports on-the-fly AJAX-enabled editing features in Outlook like style; and other enhanced functionalities.



Progress Column

Progress Column provides users with the ability to make SharePoint lists more visualized by displaying numerical data on the page using percentage-based progress bar. Professional progress bar style will make your SharePoint list really modern and stylish.



Video

Video Column and Video Web Part are powerful controls made for uploading, managing, linking and playing video files. These controls support variety of video files that can be uploaded from computer, or linked from SharePoint library or streamed from direct URL.

Remarks

Information in this document may be outdated. Please, visit www.artfulbits.com for the latest product version.