

ArtfulBits Email Web Part

for Microsoft® SharePoint®



User Guide

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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.

The screenshot shows the ArtfulBits Email Web Part interface. The ribbon includes 'Editing Tools' with 'Format Text' and 'Insert' options. The main area displays an email composition form with the following details:

- To: support@artfulbits.com ;
- Cc: Location Managers ; wssuser@gmail.com ;
- Bcc: SharePoint Administrators ;
- Subject: SharePoint Notification
- Attached: artfulbits_email_v1.4_sp2010.zip x; EULA.rtf x; Attach SharePoint files

The preview area shows the ArtfulBits logo and the following text:

ArtfulBits Email Web Part is built on the idea that email can be more intuitive, efficient, and useful.

Features:

- 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

With best regards
ArtfulBits Inc. © 2005-2010

SharePoint Team
support@artfulbits.com
www.artfulbits.com

Buttons for 'Send' and 'Cancel' are visible at the bottom.

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.

The screenshot shows a task list item titled 'Task #1'. The 'View' ribbon includes the following options:

- Version History
- Alert Me
- Send E-mail (highlighted)
- Manage Permissions
- Delete Item
- Manage

The table below the ribbon displays the following task details:

Title	Task #1
Predecessors	
Priority	(1) High
Status	In Progress

Feature List

Feature	SharePoint 2007	SharePoint 2010	SharePoint 2013
Send e-mail directly from SharePoint site	✓	✓	✓
Add actions to send e-mail directly from List Item	✓	✓	✓
Auto-populated e-mail To, Subject and body with item column values	✓	✓	✓
E-mail Attachments support [PRO]	✓	✓	✓
Ability to store outgoing e-mails in SharePoint list [ENT]	✓	✓	✓
Customizable e-mail From and Reply To fields	✓	✓	✓
Supports Active Directory users, SharePoint users, SharePoint groups, Distribution Lists as e-mail recipients	✓	✓	✓
Supports selection of e-mail recipients from SharePoint lists [ENT]	✓	✓	✓
Supports direct e-mail addresses	✓	✓	✓
Ability to expand distribution lists and send e-mail directly to its members	✓	✓	✓
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)	✓	✓	✓
Language pack support (desired localization could be added by request)	✓	✓	✓

[PRO] – Professional and Enterprise edition only

[ENT] - Enterprise edition only

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:

ArtfulBits Email Web Part



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), attach files (from SharePoint Web site or from local disk depending on web part settings):

Site Actions | Editing Tools | Format Text | Insert

Edit | Check Out | Paste | Copy | Undo | Font | Paragraph | Styles | Spelling | Layout | Markup

ArtfulBits Email Web Part

To: support@artfulbits.com ;

Cc: Location Managers ; wssuser@gmail.com ;

Bcc: SharePoint Administrators ;

Subject: SharePoint Notification

Attached: artfulbits_email_v1.4_sp2010.zip ; EULA.rtf ;
 Attach SharePoint files





ArtfulBits
software company

ArtfulBits Email Web Part is built on the idea that email can be more intuitive, efficient, and useful.

Features:

- 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

With best regards
 ArtfulBits Inc. © 2005-2010

SharePoint Team
support@artfulbits.com
www.artfulbits.com

Send Cancel

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

ArtfulBits Email Web Part



The e-mail has been successfully sent.

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 screenshot shows the 'ArtfulBits Email Web Part' settings interface. At the top, there is a button labeled 'Add a Web Part'. Below it, the 'ArtfulBits Email Web Part' is selected. The preview area shows an email form with the following fields: 'To:' with 'Designers;', 'Cc:' with 'WSSUser;', and 'Subject:' with 'SharePoint Notification'. There is an 'Attached:' section with a link to 'Attach SharePoint files'. The main body of the email contains the ArtfulBits logo and name, 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 preview are 'Send' and 'Cancel' buttons.

The screenshot shows the 'ArtfulBits Email Web Part' settings window. The 'E-mail Settings' section is expanded, showing various configuration options:

- E-mail Permissions:** Allows sending e-mail to: Users, SharePoint Groups, Distribution Lists, External Users (direct e-mail address).
- Who can send e-mail?:** All Users, Specified Users & Groups.
- E-mail To:** Default value: Designers;
- E-mail Cc:** Add Cc box. Default value: [empty]. Make 'Cc:' hidden. Allow 'Cc:' edit.
- E-mail Bcc:** Add Bcc box. Default value: [empty]. Make 'Bcc:' hidden. Allow 'Bcc:' edit.
- E-mail From:** Current User, Custom e-mail address. Value: Yura.Stetsuk@artfulbits.com.
- E-mail Subject:** SharePoint Notification.
- E-mail Attachments:** Allow to attach files from SharePoint, Allow to attach files from local disk.
- E-mail Body:** To enter formatted text and graphics, click **Rich Text Editor**. [Rich Text Editor...]. To type HTML source code, click **Source Editor**. [Source Editor...].
- Default View:** Select startup default view: E-mail Web Part Image, New E-mail Form.
- Store Outgoing E-mail:** Enable e-mail storage.

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 Subject** specifies default value for e-mail subject
- **E-mail Attachments**: ability to attach files from SharePoint Web site and/or from local disk to e-mail
- **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
- **E-mail From** allows specifying e-mail from address (For example: *noreply@company.com* or *SharePoint Notification <notify@company.com>*)
- **E-mail Reply To** allows to indicate an address other than E-mail From address in order to reply to the messages (For example: *Name.Surname@company.com* or *Administrators <admins@company.com>*)
- **Default View** provides default view for Web Part (when page is opened). Possible options:
 - E-mail Web Part Image
 - New E-mail Form
- **Store Outgoing E-mails** allows to maintain outgoing e-mails history in SharePoint list. Specify SharePoint list, columns mapping and check "Store e-mail attachments" to store e-mail attachments in Attachments of list item.

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 is 'Email Demo > Tasks > List Settings'. The left sidebar shows navigation options: 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'. Under the 'Communications' tab, the 'E-mail settings' link is highlighted with a mouse cursor. Other links in this tab include 'RSS settings'. The 'General Settings' tab contains links for 'Title, description and navigation', 'Versioning settings', 'Advanced settings', 'Validation settings', and 'Audience targeting settings'. The 'Permissions and Management' tab contains links for 'Delete this list', 'Save list as template', 'Permissions for this list', 'Workflow Settings', and 'Generate file plan report'.

In List E-mail Settings page select **Yes** under **Enable e-mail features for this list** box. 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 shows the 'Enable List E-mail Features' settings page. It is divided into three sections:

- Enable List E-mail Features:** The text states 'Enabling e-mail features will add 'Send E-mail' action for list item.' The option 'Enable e-mail features for this list' is set to Yes and No.
- "Send E-mail" Action Settings:** The option 'Show on Item Display Form' is set to Yes and No. The option 'Show in Edit Item Menu in list view' is set to Yes and No.
- E-mail Permissions:** The text states 'Specify e-mail permissions.' The option 'Who can send e-mail?' is set to Specified Users & Groups. Below this, a text box contains the list: `Administrator ; Approvers ; Hierarchy Managers ;` with a plus icon and a help 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. To add e-mail recipients from SharePoint list, it is needed to check **Select e-mail recipients from SharePoint list** option and specify the list source, list view (for filter recipients

in list) and list column which contains e-mail addresses. **Allow editing** checkbox specifies whether user can edit certain e-mail box before sending e-mail. If you want to hide "Cc:" or "Bcc:" e-mail box from e-mail sender before sending e-mail, just check **Make hidden** checkbox in corresponding e-mail box section.

E-mail Recipients

Specify e-mail recipients.

Send To

Users & Groups based on data from the following columns:

Created By

Modified By

E-mail addresses from the following column:

(None) ▼

Add the following Users & Groups:

Allow 'To:' edit

E-mail Cc

Add Cc box

support@artfulbits.com

Make 'Cc:' hidden

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], [Attachments]**

E-mail Subject

Tasks - [Title]

Allow 'Subject:' edit

E-mail Attachments

Attach current item Attachments

Allow to attach files from SharePoint

Allow to attach files from local disk

E-mail Body

Tasks: [Title]

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.

Example:

noreply@company.com

SharePoint Notification <notify@company.com>

E-mail From

Current User

Custom e-mail address

no-reply@artfulbits.com

E-mail Content section contains tools to customize e-mail Subject, attachments and e-mail body. You can use **[Column Name]** or **[USER.Column Name]** template keys to auto populate e-mail content with column item values or current user data. **E-mail From** allows specifying "e-mail from" address. Use Reply To option to indicate an address other than the E-mail From address in order to reply to the messages.

To store outgoing e-mails you should check **Enable e-mail storage** option and specify SharePoint Site and List. After that each e-mail will be added as a new list entry. If list allows management content type then it is **possible to choose content type, the outgoing email should be stored as**. In this section you can specify columns mapping and to specify whether to add e-mail attachments to list item attachments or not.

Store Outgoing E-mail
Allows to maintain outgoing e-mails history in SharePoint list.

Enable e-mail storage

Site: Demo

List: Emails History

Content Type: Outgoing Email

Columns Mapping:

E-mail To	Email To
E-mail Cc	Email Cc & Bcc
E-mail Bcc	Email Cc & Bcc
E-mail Subject	Title
E-mail Body	Email Body

Store e-mail attachments

Save Cancel

Email Global Settings

In Email Settings page, you are able to specify additional global settings of Email Web Part such as custom SMTP settings and others (Site Actions → Site Settings → Site Collection Administration → E-mail settings).



Site Collection Administration

- Search settings
- Search scopes
- Search keywords
- FAST Search keywords
- FAST Search site promotion and demotion
- FAST Search user context
- Recycle bin
- Site collection features
- Site hierarchy
- Site collection audit settings
- Audit log reports
- Portal site connection
- Site collection policies
- Content type publishing
- Help settings
- Password Change settings
- Password Expiration settings
- Password Reset settings
- E-mail settings**

In **Mail Settings** section you can specify SMTP mail server to use in Email Web Part. You can use default SharePoint e-mail settings or provide custom SMTP server settings, including SMTP server, port, credentials and usage of SSL.

Mail Settings Specify the SMTP mail server to use in Email Web Part. You can use default SharePoint e-mail settings or provide custom SMTP server settings.	<input type="radio"/> Default SMTP <input checked="" type="radio"/> Custom SMTP SMTP Server: <input type="text" value="smtp.server.com"/> Port: <input type="text" value="567"/> <input type="radio"/> Use default network credentials <input checked="" type="radio"/> Custom credentials Domain: <input type="text"/> Username: <input type="text" value="smtpaccount"/> password: <input type="text" value="●●●●●●●●"/> <input type="checkbox"/> Enable Secure Sockets Layer (SSL)
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In **Distribution Lists** section, one can specify how to send e-mails to distribution lists (DL) of Active Directory (AD). By default e-mail is send to DL address. In some cases, DL e-mail address cannot be resolved, for e.g. if you have Active Directory without Exchange server, and use some external SMTP server. In this scenario, Email Web Part can automatically expand DL and send email directly to its members. In order to do it, **Expand DL and send e-mail directly to its members** option should be checked. Then, specify in **Active Directory Settings** section it's **Domain** and **AD account** that has a right to read members of distribution list in Active Directory.

Distribution Lists Provide additional settings of e-mail for Active Directory distribution lists.	How to send email to AD distribution list (DL)? <input type="radio"/> Send e-mail direct to DL address <input checked="" type="radio"/> Expand DL and send e-mail direct to its members
Active Directory Settings Provide domain and AD account that has right to read members of distribution lists.	Domain: <input type="text" value="artfulbits"/> AD Account: <input type="radio"/> Application Pool Identity <input checked="" type="radio"/> Specified account User name: <input type="text" value="domainuser1"/> Password: <input type="text" value="●●●●●●●●"/>

Release Notes

Version	Notes
v2.0 (March 11, 2013)	New Features: <ul style="list-style-type: none">• Added SharePoint 2013 support• Added Russian and German localization Improvements: <ul style="list-style-type: none">• Improved performance
v1.91 (July 13, 2012)	Improvements: <ul style="list-style-type: none">• Improved outgoing email storing when backup and restore site
v1.9 (May 18, 2012)	New Features: <ul style="list-style-type: none">• Added custom SMTP settings support• Added Reply To option
v1.8 (March 23, 2012)	New Features: <ul style="list-style-type: none">• Added ability to expand distribution lists and send e-mails directly to its members• Added user template fields support in e-mail subject and body Bugs Fixed: <ul style="list-style-type: none">• Fixed minor issues
v1.71 (March 2, 2012)	New Features: <ul style="list-style-type: none">• Added ability to send email selecting multiple items [ENT]• Added "Send E-mail" action in ribbon on list view page (SharePoint 2010 only) Improvements: <ul style="list-style-type: none">• Improved look & feel of Send E-mail dialog Bugs Fixed: <ul style="list-style-type: none">• Fixed minor issues
v1.6 (October 14, 2011)	New Features: <ul style="list-style-type: none">• Added ability to select e-mail recipients from SharePoint list [ENT] Improvements: <ul style="list-style-type: none">• Improved outgoing e-mail storage• Added ability to disable e-mail To box• Added SharePoint August CU update support Bugs Fixed: <ul style="list-style-type: none">• Fixed minor issues
v1.51 (September 14, 2011)	Bugs Fixed: <ul style="list-style-type: none">• Fixed Access Denied error when sender does not have permissions to view the membership of e-mail recipient group
v1.5 (August 31, 2011)	New Features: <ul style="list-style-type: none">• Added ability to attach files from local disk [PRO]

	<ul style="list-style-type: none"> • Added ability to store outgoing e-mails in SharePoint lists [ENT]
v1.4 (August 11, 2011)	New Features: <ul style="list-style-type: none"> • E-mail Attachments support [PRO] • Added "To" box mapping with Single line of text column value (email addresses) • Added ability to hide e-mail "Cc" and "Bcc" boxes from end users
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 item • Added 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 Item • Auto 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

[PRO] - Professional edition

[ENT] - Enterprise edition

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.



Password Change Web Part

Password Change Web Part allows users to change their own passwords from within the SharePoint environment using standard text box interface (current password, new password and confirm new password).



Password Expiration Web Part

Password Expiration Web Part enables Active Directory users to be notified via Web Part interface that their passwords are about to expire. It also automatically sends out email notifications to users before the password expiration date.



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.