



EMAIL MANAGER 3.7 CLIENT USER GUIDE

Rev. 1.2

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1 INTRODUCTION

This document describes how to utilize the Email Manager (eMgr) Client to add Outlook or Lotus Notes items to a FileNet repository. An overview of how use the application is provided in the [Using the Client](#) section, and subsequent sections provide details on the features available in the Email Manager Client.

Note: screenshots may not reflect the view available in the Email Manager Client for each email client supported.

2 USING THE CLIENT

This section provides an overview of how to use the Email Manager Client to add items to a FileNet repository. Adding an item to a repository consists of selecting an item in the email client, choosing the **Add to FileNet** option, and selecting or creating a Profile to use to add the item to a FileNet repository.

1. Select Items in Mailbox

To add Mailbox Items to a FileNet repository, first select the item or group of items in the mailbox. If Outlook is being used email, calendar items or tasks may be selected. If Lotus Notes is being used email may be selected.

2. Choose Add to FileNet

Once the items have been selected click the Email Manager Toolbar button to begin the add process.

The [Select Profile](#) screen will be opened after choosing this option.



Figure 1 - The Email Manager toolbar button

3. Select a Profile

In the Select Profile screen, select the Repository in to which the selected items should be added. Login to the repository using the FileNet login screen that will be displayed. After selecting the Repository, select the FileNet Group that should be used. A list of Profiles for the selected Repository will be shown. An existing Profile may be selected, or a new profile may be created. After selecting a Profile, the items will be added to FileNet using the selected Profile. If the Profile is configured to display before adding to FileNet, the Profile content will be displayed in the [Apply Profile](#) screen and may be updated as required.

3 CONFIGURE EMAIL MANAGER CLIENT

The Configure Email Manager Client screen is used to update specific settings in the Email Manager Client and manage Email Manager Profiles. The screen may be opened using the **Tools -> Configure Email Manager Client** menu option in Outlook, or in Outlook, Lotus Notes and GroupWise by clicking the **Configure Email Manager Client** link on the **Select Profile** screen.

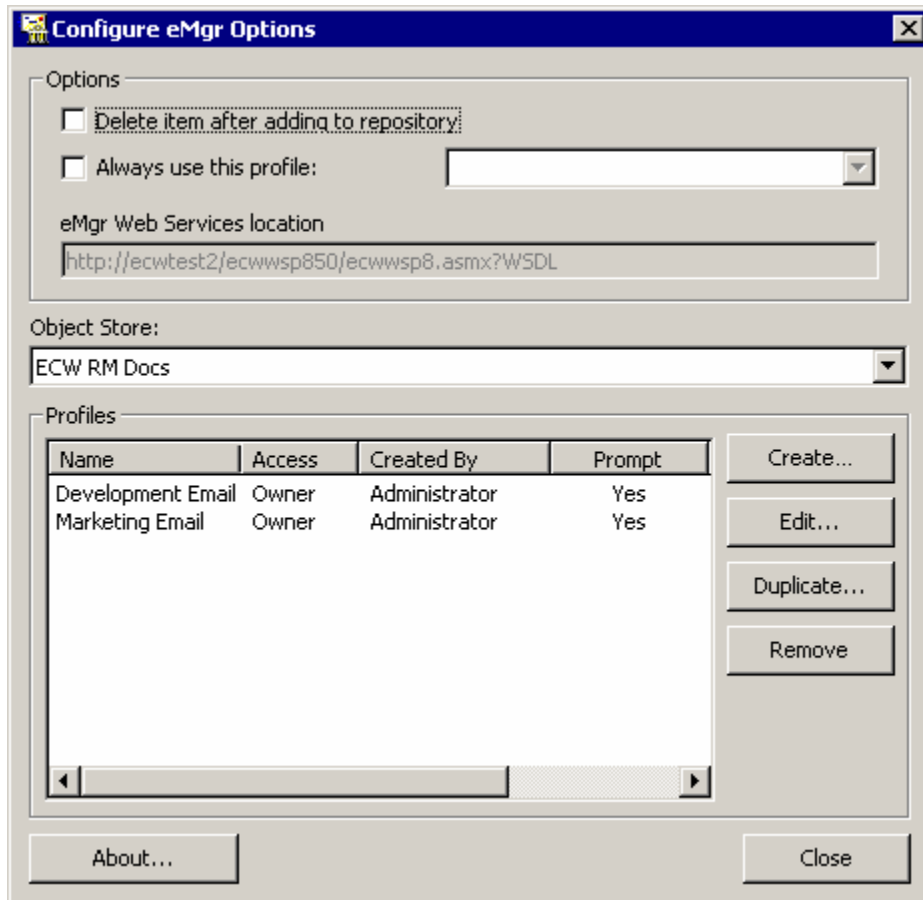


Figure 2 - Configure Email Manager Client Screen

The following is a description of the configuration options available.

Delete Item After Adding to Repository

This option is used to specify whether or not a mailbox item should be deleted after it has been added to a FileNet repository. If this option is selected, mailbox items added to FileNet will be deleted. If this option is not selected, the items will remain. This option may be overridden in the **Select Profile** screen when adding an item to FileNet.

Prompt to Capture Sent Item

If this option is selected, when a user sends an email, a prompt will appear asking the user if the sent email should be captured.

Always Use This Profile

This option is used to specify whether a specific profile should always be used when adding email to the FileNet repository. If this option is selected, the combo box next to the option box will be enabled and a profile may be selected from the list. If this option is not selected, the Select Profile screen will show and a profile must be selected from the Select Profile screen.

Email Manager Web Services Location

This field specifies the location of the Email Manager Web Services. The Email Manager Web Services are used by the Email Manager Client to communicate with FileNet as well other Email Manager components. The address is shown on this screen for informational purposes only and may not be updated. If the Web Services location needs to be changed, it must be changed by the system administrator.

Select a Repository/Object Store

Select the repository for which Profiles should be displayed. Once a repository is selected, a list of Profiles that have been configured for that repository will be shown. The first time a repository is selected a FileNet login screen will be shown. After logging into the FileNet repository, the Group combo-box will contain a list of FileNet groups the current user is a member of. The Group will default to the user's default Group.

Group

Select the FileNet group that should be used. All groups that the current user belongs to in the selected repository will be shown. Changing the group will impact what information is displayed in the Profile Create/Edit screen.

Profiles

This section lists all Profiles that are available for use. The following options are available for Profiles. The user must have sufficient permissions to modify a profile.

Create...

Selecting this option will open the Create Profile screen which will allow for the creation of a new Profile.

Edit...

Selecting this option will open the Edit Profile screen which will allow for the editing of an existing Profile. Only those Profiles that have been created by the current user may be edited.

Duplicate...

Selecting this option will open the Create Profile screen which will allow for the creation of a new Profile based on an existing Profile.

Remove

Selecting this option will remove the selected Profile. Only Profiles that have been created by the current user may be removed.

About

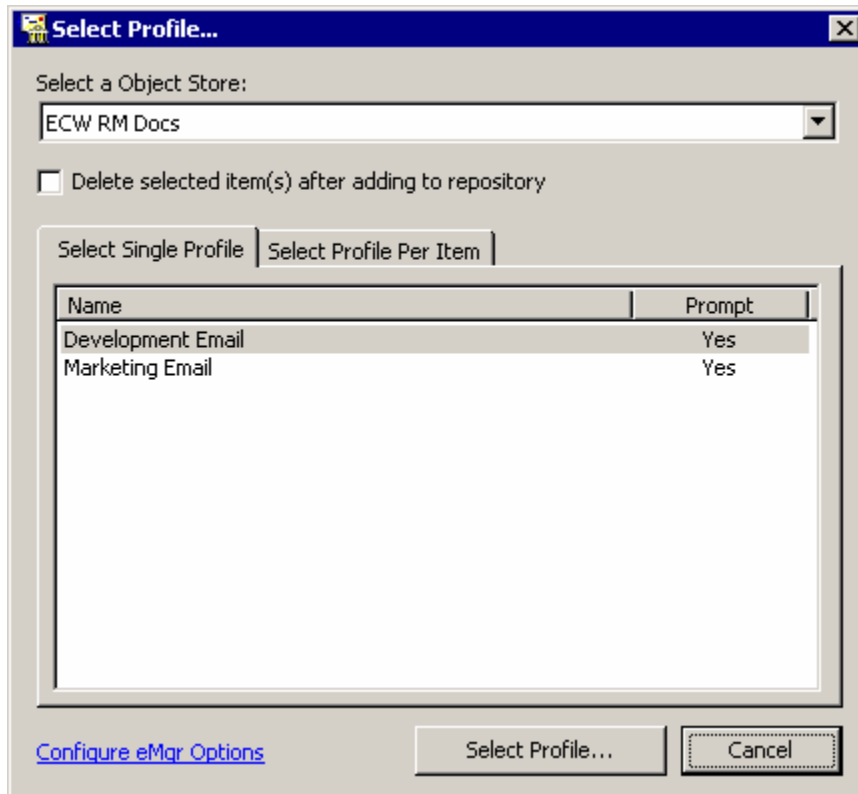
Click the `About` button to show About dialogue, which will information about the application version.

Close

Click the `Close` button to close the Configure Email Manager Options screen.

4 SELECT PROFILE

The Select Profile screen is shown when an item or set of items in a mailbox are selected and the Email Manager toolbar button is selected.



The following is a description of the options available on the screen.

Select a Repository/Object store

Select the repository that the selected mailbox item(s) should be added to. Once a repository is selected, a list of Profiles that have been configured for that repository will be shown. The first time a repository is selected a FileNet login screen will be shown. After logging into the FileNet repository, the Group combo box will contain a list of FileNet groups the current user is a member of. The Group will default to the users default Group.

Group

Select the FileNet group that should be used. All groups that the current user belongs to in the selected repository will be shown. Changing the group will impact what information is displayed in the Profile Create/Edit screen. Groups are only shown for FileNet Content Services.

Select Single Profile

This section lists all Profiles that are available for use. The selected Profile will be applied to all items selected in the mailbox for capture.

Select Profile Per Item

This section lists all items that have been selected in the mailbox (including attachments for each item) and allows a separate profile to be selected for each item or attachment. Select an item by selecting the checkbox next to the item name. Select a profile for an item by choosing a profile from the combo box next to an item. If profiles are configured to “prompt” a separate profile prompt will appear for each item selected.

Select Profile Button

Selecting this option will use the selected Profile(s) to add the selected mailbox item(s) to FileNet. If the Profile is configured to prompt after being selected, the content of the Profile will be shown before the selected mailbox Item(s) are archived.

Cancel Button

Selecting this option will close the Select Profile screen and cancel the “add to FileNet” action.

4.1 Apply Profile

The Apply Profile screen will be shown if the **Always show profile before adding to Repository** option is selected in the Profile, in the Advanced section. The contents of the profile will be shown and some of the data may be edited.

Apply Profile

Profile Name: Capture Email [Edit Email Format...](#)

Declare as record Capture attachments as individual files

Enable shortcuts [Edit Shortcut Options...](#)

In captured email file:

Leave attachments in email

Remove attachments from email

Document Indexing | **Record Declaration**

Class: Link captured files

Folder to file documents: ...

Property	Value
Document Title	Project Update
From	From Address/Display
To	To Address/Display
Cc	CC Address/Display
Subject	Project Update
Sent On	Sent Date (UTC)
Received On	Received Date (UTC)

OK Cancel **Advanced >>**

Figure 3 The Apply Profile screen.

The following is summary of each field on the screen.

Profile Name

This is the name of the profile.

Options

The following capture options are available.

Index

Selecting this option will cause items that are added to FileNet to be content indexed. This option is only available for FileNet Content Services.

Capture Email

If selected, the email will be added to the FileNet repository as a file. To select the format that email should be added in, click the "Edit Email Format..." link.

Capture attachments as individual files

If selected, attachments will add to the FileNet as individual files. The same properties that are assigned to the mailbox item will be assigned to the attachments with the exception of Title. The Title property will be set to the filename of the attachment.

Leave/Remove Attachments From Email

Selecting the "remove" option will remove the attachment from a captured email in the FileNet repository. If this option is not selected, the attachment will remain within the email. The email in the mailbox is not affected by this option.

Declare as Record

If selected, an item added to a P8 Records Manager enabled repository will be declared as a record.

Enable Shortcuts

Selecting this option will enable functionality to update the email in the mailbox to include "shortcuts" to the email and attachments added to the document repository. To edit shortcut options, click the "Edit Shortcuts Options..." link.

Document Indexing

The Document Indexing section describes how items will be indexed in the FileNet repository.

Class

This is the document class that should be used when adding items to the selected repository. All document classes in the repository that the current user has access to are shown.

Link Captured Files

When using P8 Content Engine and the "Email" class (or a class derived from it) is selected as the **Class**, if Link Captured Files is selected, captured email files will be linked to attachments.

Folder to file documents

This is the FileNet folder that items should be added to. To select the folder, click the "..." button to browse or search the selected FileNet repository.

Property Mappings

Property Mappings are used to specify what values should be assigned to each Document Repository Property when an email is archived using a profile. Each property mapping consists of the following.

Repository Property

A list of document repository properties (including custom properties) configured for the Document Class selected. A "*" next to the name is used to indicate properties that are mandatory.

Value

This is the value to assign to each FileNet Property. Email properties that can be assigned to the FileNet Property are shown in a combo box, as well any CVL or pick lists. The email properties listed are dependent on the data type of the

FileNet Property. For example, if a FileNet Property is a date, only date-related email properties will be listed. The email properties are shown at the top of the pick list in the combo box. Values for FileNet Properties can also be manually entered in the field. See the section [Multi-Value Properties](#) for details on how multi-value properties are handled. Note that property mappings containing regular expression or calculated values can only be created in the Email Manager Server Configuration utility. The following email properties are available:

Email Property	Description
Attachment Count	The number of attachments in an email.
Attachment Flag	Indicates whether or not an item has attachments.
Body Summary	The email body (first 254 characters).
CC Address	The address portion of the any entries that appear in the CC field.
CC Address User Id	The user portion of any entries that appear in the CC field.
CC Address/Display	The address and display name of the any entries that appear in the CC field.
CC Display	The display name portion of the any entries that appear in the CC field.
Conversation Topic	The conversation topic (original subject line) of the item.
Email Id	The unique id of the item.
Email Server	The name of the email server that the email resides on.
From Address	The address portion of the entry that appears in the From field.
From Address User Id	The user portion of any entries that appear in the From field.
From Address/Display	The address and display name of the entry that appears in the From field.
From Display	The display name portion of the entry that appears in the From field.
Originating User Id	The id of the user who initiates the capture of an email.
Received Date (Local)	The received date of the item using the local time.
Received Date (UTC)	The received date of the item using UTC time (Coordinated Universal Time a.k.a. Greenwich Mean Time).
Sent Date (Local)	The sent date of the item using the local time.

Sent Date (UTC)	The received date of the item using UTC time (Coordinated Universal Time a.k.a. Greenwich Mean Time).
Subject	The subject line of the item.
To Address	The address portion of the any entries that appear in the To field.
To Address User Id	The user portion of any entries that appear in the To field.
To Address/Display	The address and display name of the any entries that appear in the To field.
To Display	The display name portion of the any entries that appear in the To field.

Record Declaration

For P8 systems enabled for Record Manager use, the Record Declaration section will be enabled to allow record declaration data to be entered.

File Plan Object Store

The file plan Object Store that the record should be declared in.

Record Class

This is the record class to use when declaring the record. Click the “...” button to select a record class.

Classification

This is the classification(s) that should be used when declaring a record. To add a classification, click the add classification button. To remove a classification, click the remove classifications button.

Property Mappings

A list of Properties (including custom properties) configured for the record class selected. A “*” next to the name is used to indicate Properties that are mandatory. The Record Declaration property mapping section operates in the same way the Document Indexing property mapping section operates.

Advanced Options

Clicking the “Advanced” button will show or hide the “advanced” section of the screen.

Always Show Profile Before Adding To Repository

If this option is selected, when the Profile is chosen by the user when an item is selected for adding to FileNet, the user will be prompted with the Profile details. This option may only be updated when a profile is created. The fields that are shown when the user is prompted with a profile may be configured by selecting one of the following options:

- Prompt for all fields: all fields in the profile will show.
- Prompt only for all empty fields: only fields in the profile that have not been assigned a value will show.
- Prompt only for all empty required fields: only fields in the profile that are mandatory and have not been assigned a value will show.
- Prompt only for all required fields: only fields in the profile that are mandatory will show.

Share This Profile With Other Users

Selecting this option will make the profile available to users other than the user who created the profile. This option may only be updated when a profile is created. The Profile Security screen (accessed by clicking the “...” button next to this option) may be used to specify what users or groups have access to the profile.

Document Security

The Document Security section is used to specify the security that should be assigned to mailbox items that are added to FileNet. Security privileges can be created based on Email Properties, FileNet Users and FileNet Groups. For FileNet Content Services, default security may be configured so it is based on the current user’s DIAL (Default Item Access List).

Security privileges based on Email Property assign the indicated access level to all users whose name appears in the Email Property selected (either To, From, or CC). Note: The Exchange Server or Lotus Domino user name and the FileNet user name must be identical in order to take advantage of this feature.

Security privileges based on FileNet Users assign the indicated access level to the FileNet user specified.

Security privileges based on FileNet Groups assign the indicated access level to the FileNet group specified.

To add Security privileges, select the type of the security privilege to add (Email Property, Users or Groups), select the Name (an email property, user name or group name) and the access level to assign to the item selected in the Name combo box. Click the **Add** button to add the Security settings.

To update a Security setting, select an item in the Document Security grid. The Name and Access Level will be populated with the data of the item selected. Change the name or Access Level and click the **Modify** button. The item will be updated in the grid.

To remove a Security setting, select an item in the Document Security grid. The Name and Access Level will be populated with the data of the item selected. Click the **Remove** button. The item will be removed from the grid.

Note: the **Add/Modify** button will dynamically change depending on the mode the screen is in.

The Document Security section consists of the following items:

Document Security Grid

The Document Security grid shows all the access privileges that have been created. The grid shows the Type of the access privilege (either Email Property, User or Group), the Name (either the email property name, user name or group name) and the access level assigned (either None, Viewer, Author, Owner or Admin).

Email Property/Users/Groups Radio Buttons

When adding Security privileges, select the item that the access privilege will be based on. Selecting Email Property will populate the Name combo box with a list of Email Properties that security settings can be derived from (To, From, and CC). Selecting Users will populate the Name combo box with a list of document repository Users. Selecting Groups will populate the Name combo box with a list of document repository Groups.

Access Level

The access level to assign to the item selected in the Name combo box. The access levels that available may be limited by the system administrator. In addition, the administrator may override access levels.

OK Button

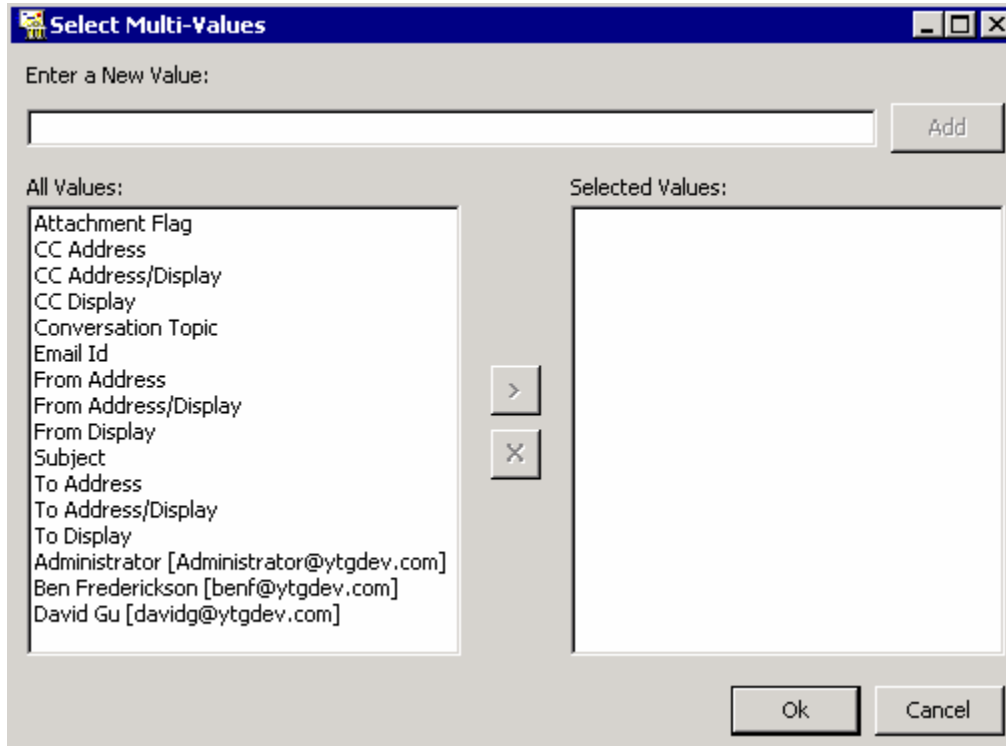
Selecting this button will cause the item(s) to be added to the FileNet repository using the Profile.

Cancel

Selecting this button will cancel the Profile creation or update process and close the screen.

4.2 Multi-Value Properties

If a multi-value property is clicked on in the Property Mapping Grid, the Select Multi-Values screen will be shown. In this screen, items may be added to or removed from the multi-value list.



Enter a New Value

If the multi-value property accepts user entered values, new values may be added to the Selected Values list by entering them in the Enter New Value field and clicking the Add button.

All Values

Values that may be assigned to the multi-value property are shown in this list. Email properties that can be assigned to the property are shown, as well any CVL or pick lists. The email properties listed are dependent on the data type of the multi-value property. For example, if a property is a date, only date-related email properties will be listed. The email properties are shown at the top of the pick list. To add a value to the list, select the value and click the ">" button.

Selected Values

This list shows all values that have been already been assigned to the multi-value property. To remove an item from list, select the item and click the x button.

5 MESSAGE VIEWERS

Email Manager captures email messages from Microsoft Exchange servers in the native (.msg) file format. These saved messages can be opened and viewed using Microsoft Outlook.

Lotus Notes and Novell GroupWise do not have native file formats for individual mail messages. Email Manager captures Lotus email messages as Domino XML (.DXL) files and GroupWise messages using custom xml (.fngwentity) files. The Email Manager Client includes simple viewer applications to view messages stored in these file types.

5.1 Domino XML (DXL) Viewer

The Domino XML (DXL) Viewer is a stand-alone client application for viewing DXL files and for importing DXL files into Lotus Notes. The user interface is divided into two parts. The upper file selection list shows recently opened DXL files and the lower preview pane shows the content of the currently selected file.

Opening DXL files in the DXL Viewer

DXL files may be opened in the DXL Viewer in one of the following ways:

- From FileNet Workplace.
- From Windows using the file association.
- Dragging and dropping DXL files from Windows Explorer into the DXL Viewer file selection list.
- From the command line, passing the filename as a parameter.
- From the File, Open dialog in the DXL Viewer.
- Selecting a document in Lotus Notes and clicking on the DXL icon in the FileNet Email Manager custom toolbar. The selected document is exported to DXL and opened.

Using the file selection list

The file selection list displays summary information about selected files and is used to switch between files. By default, the file selection list is displayed in details view as a table with four columns, Subject, UNID (Unique ID), File name and Location.

The information displayed in the file selection list is obtained from the file name, not the message content and relies on Email Manager to name the file according to a specific naming convention. The subject displayed in the file selection list is also limited to 60 characters and may differ from the message subject if the subject contains characters that are not valid in filenames.

The following operations are available directly from the file selection list:

Display file contents in the preview pane

Click on a file in the file selection list to select the file and preview it in the preview pane using the current preview formatting option.

Open a file in Lotus Notes

Double-clicking on a file selects the file and acts as a shortcut to the 'Import into Lotus Notes...' menu option. If Lotus Notes is open and connected to a Domino server, the DXL file will be opened in Lotus Notes. See below for more information.

Displaying the context menu

Right-click to display the context menu. See below for information on the menu items.

Viewing and resizing columns

In details view the columns can be resized. Clicking on a column header will automatically resize the column to fit the data.

Menu Options

The main menu provides access to all DXL viewer functionality. Most menu options are also accessible from the right-click context menu in the file selection list (see below).

File Menu

The File Menu is accessed from the DXL Viewer main menu. Most of the File menu options are also available from the right-click context menu in the file selection list. This menu provides the following options:

Open...

Opens the Windows file selection dialog to locate DXL files on the file system. The selected files are added to the file selection list and the last file is displayed in the preview pane.

Preview As

Displays the 'Preview As' submenu to switch between display formats for the preview pane. This submenu is also accessible from the right-click context menu. The available options are:

HTML – All

Displays the mail message, properties table and links/attachments table in the preview pane as formatted HTML.

HTML – Mail Message

Displays the mail message in the preview pane as formatted HTML. This is the default preview format.

HTML – Properties

Displays the properties table in the preview pane as formatted HTML. This table lists all the items in the source Lotus Notes document.

HTML – Links/Attachments

Displays the links/attachments table in the preview pane as formatted HTML.

XML

Displays the DXL file as formatted XML.

Text

Displays the file contents as plain text.

Open As

Displays the 'Open As' submenu to control how the DXL document is opened. This submenu is also accessible from the right-click context menu. The available options are:

HTML – All

Opens the file in Internet Explorer and displays the displays the mail message, properties table and links/attachments table as formatted HTML.

HTML – Mail Message

Opens the file in Internet Explorer and displays the displays the mail message as formatted HTML.

HTML – Properties

Opens the file in Internet Explorer and displays the displays the properties table as formatted HTML. This table lists all the items in the source Lotus Notes document.

HTML – Links/Attachments

Opens the file in Internet Explorer and displays the links/attachments table as formatted HTML.

XML

Opens the file as formatted XML in Internet Explorer.

Text

Opens the file as plain text in Notepad.

Import into Lotus Notes...

If Lotus Notes is open and connected to a Domino server, selecting this option will import the current document into the user's Notes mailbox as a temporary document, then open it in the Lotus Notes client. Because the user is already logged into Notes, no authentication dialog will be displayed. The imported message can be forwarded or replied to, but not recaptured.

This option is also accessible from the right-click context menu. This option is not available if Lotus Notes is not running and it may also be disabled by the administrator.

Exit

Closes the DXL Viewer.

Edit Menu

The Edit Menu is accessed from the DXL Viewer main menu. The edit menu options are also available from the right-click context menu in the file selection list. This menu provides the following options:

Select All

Click to select all files in the file selection list. This option is used in conjunction with Remove Selected to remove files from the file selection list.

Select None

Clears the file selection (does not effect the file that is displayed in the preview pane).

Remove Selected

Removes selected files from the file selection list.

Remove All

Removes all files from the file selection list.

View Menu

The view menu is available from the main menu and from the right-click context menu in the file selection panel. The options in this menu are used to change the display format of the file selection list. The file selection list is shown as a table by default, but may be viewed as:

Large Icons

Small Icons

List

Details

Details view is the default format. The file selection list is displayed as a table with four columns, Subject, UNID (Unique ID), File name and Location. The columns can be resized and clicking on a column header will automatically resize the column to fit the data.

Note: The information displayed in the file selection list is obtained from the file name, not the message content. The subject displayed in the file selection list is limited to 60 characters and may differ from the message subject if the filename does not conform to the Email manager naming convention or if the subject contains characters that are not valid in filenames.

Help Menu

This menu contains one option, **About** that displays the DXL Viewer version.

5.2 GroupWise Entity Viewer

The GroupWise entity viewer is an HTML application that uses Internet Explorer to display formatted GroupWise messages. The displayed information also includes extended message information in expandable sections. Depending on the content of the message, these sections may include:

Message

The email message is displayed in the familiar email message layout, including the key message properties such as sender, message date, recipients, subject and the message body.

Attachments

The attachment table is displayed if the message contains attachments and/or embedded GroupWise messages. The attachment table lists the attachment names, filenames, types and sizes. The filenames are displayed as hyperlinks. If the attachment is an embedded GroupWise message, clicking on the hyperlink will open the attached message in another GroupWise Entity Viewer window. Clicking on a file attachment hyperlink will open the attachment, either in the associated application or in Internet Explorer. Opening attachments from hyperlinks is subject to the usual Internet Explorer security restrictions, and may be blocked or may cause Internet Explorer security dialogs to be displayed.

Recipients

Expand the recipients table for additional information about message recipients, including the recipient type (To, CC, BCC), email address and display name.

Sender

Expand the sender block for more information about the sender, including the email address and display name.

Sharer

Expand the sharer block for more information about the sharer. The sharer is typically the sender, unless the message was captured from a shared mailbox.

Properties

Expand the properties table for in-depth information about the email message, including message IDs, creation and modification status, delivery status and more.

Fields

This section is present if the message contains extension fields. Expand the fields table to see the values of all extension fields in the message. These fields may be added to the application by the administrator, Email Manager and other applications.

Reply Children

This section is present if the message is part of a message thread with one or more replies. Expand to see the message IDs of all reply children of this message.

Autodate Messages

This section is present if the message is a task or appointment that will cause additional messages to be sent at specific future dates. Expand to see the message IDs of all related autodate messages.