

Mail Manager

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Mail Manager

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This document has been created to provide a guide for the use of the software. It does not provide engineering advice, nor is it a substitute for the use of standard references. The user is deemed to be conversant with standard engineering terms and codes of practice. It is the users responsibility to validate the program for the proposed design use and to select suitable input data.

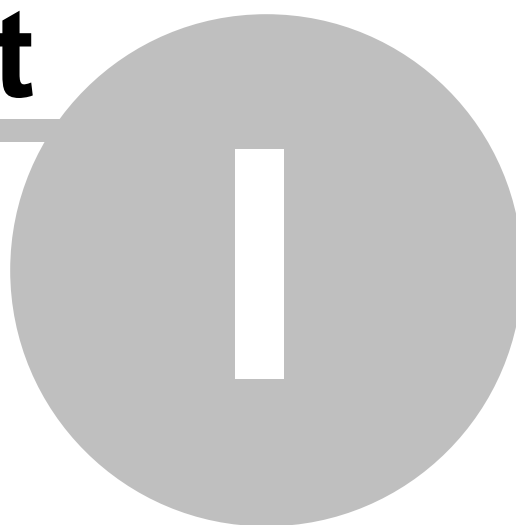
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Table of Contents

Part I Implementation guide	2
1 Configuration files	3
MailManager.mdb	3
EmailFiling.cfg	3
AdminEmailFiling.cfg	3
Admin user preferences tool.....	4
Collections.txt	5
Part II Installation	7
1 Prerequisites	7
2 Single PC installation	7
3 Multiple PC installations	8
Setup	8
MSI command line options	9
Admin user preferences tool.....	10
Alternate welcome page.....	11
Install from a network folder	11
Deploy using Microsoft Group Policy Objects (GPO)	11
Part III Filing locations	13
1 Collections	13
Collections manager	13
Collections Editor	15
2 Personal locations	16
Import/Export personal locations	18
3 Filing location FAQ's	19

Implementation guide

Part



1 Implementation guide

The following 4 key steps provide a quick overview of how to implement Mail Manager throughout your office:

- Review configuration options
- Review your email filing procedures
- Setup and deploy Mail Manager
- Provide user training

Review Mail Managers configuration options

- User preferences can be controlled via the Admin user preferences tool.
- The [Admin user preferences tool](#) is used to set, lock and update User preferences. To aid adoption, make it as simple as possible for users to file their emails, don't be too restrictive by locking everything down. At any time, you can review the options and update users.
- The [Collections.txt](#) can be used to centrally pre-populate the filing locations used by Mail Manager. Refer the [Oasys web site](#) for more information.

Review your email filing procedures

Using Mail Manager, take the opportunity to optimise the process of filing emails, e.g.

- Aim to reduce paper copies to a minimum, by encouraging the use of the powerful search tool
- Automatically delete filed emails from the user's inbox by default
- Encourage the use of Mail Manager's Send a link option rather than forwarding emails

Setup and deploy Mail Manager

- See [Multiple PC installations](#)
- Note: If upgrading from a previous version the AdminEmailFiling.cfg located in the All Users folder will be ignored. To maintain control of the User preferences ensure the [Network Configuration Folder](#) is setup.

Provide user training

- Typically training would be in a show-and-tell type format rather than formal classroom training.
- Ensure that the basics are covered e.g.
 - How to add filing locations – highlight the differences between "Personal" and shared (Collections) filing locations
 - File project-related emails to a single project folder
 - Explain that Mail Manager will learn where you file messages and suggest a location/s
 - Try using the "Filter displayed list" to quickly reduce the number of locations
- Explain how existing or multiple emails can be filed using the shift and/or control keys
- Explain the use of the options
 - Send a link
 - Send a task request
 - Saving attachments
 - Setting defaults via User preferences

- How to search for filed emails
 - Search single and multiple locations
 - Using the Options pane
 - Advanced queries
 - Right-click options

- Explain the main business benefits of using Mail Manager in your firm, e.g.
 - Emails are quickly and easily filed into project folders, improving compliance with QA procedures
 - Promptly filed emails aids team working, i.e. other users can quickly search for filed emails
 - Increase the reliability of mail server by reducing the storage load required
 - Laptop users not connected to the network can still file, search & preview their emails whilst offline

1.1 Configuration files

Mail Manager uses the following configuration files:

- [MailManager.mdb](#)
- [EmailFiling.cfg](#)
- [AdminEmailFiling.cfg](#)
- [Collections.txt](#)

1.1.1 MailManager.mdb

Used to store and manage the list of "All" and "Suggested" locations. This file is maintained automatically and should **NOT** be edited manually. See [Filing Locations](#) to add and edit the locations.

Located in: %AppData%\OasysMail Manager

When Mail Manager needs to update the structure of the MailManager.mdb file it will first create a backup in a sub-folder called: **\DatabaseBackup**

1.1.2 EmailFiling.cfg

The EmailFiling.cfg file is used to define the options in the User Preferences dialog.

Editing the EmailFiling.cfg file is carried out via Mail Manager toolbar i.e. **Tools** > User Preferences...

Located in: %AppData%\Oasys\Mail Manager

1.1.3 AdminEmailFiling.cfg

The AdminEmailFiling.cfg file is used to control the values in the [EmailFiling.cfg](#) file and should be located in the "[Network Configuration Folder](#)".

Use the [Admin user preferences tool](#) to edit the AdminEmailFiling.cfg

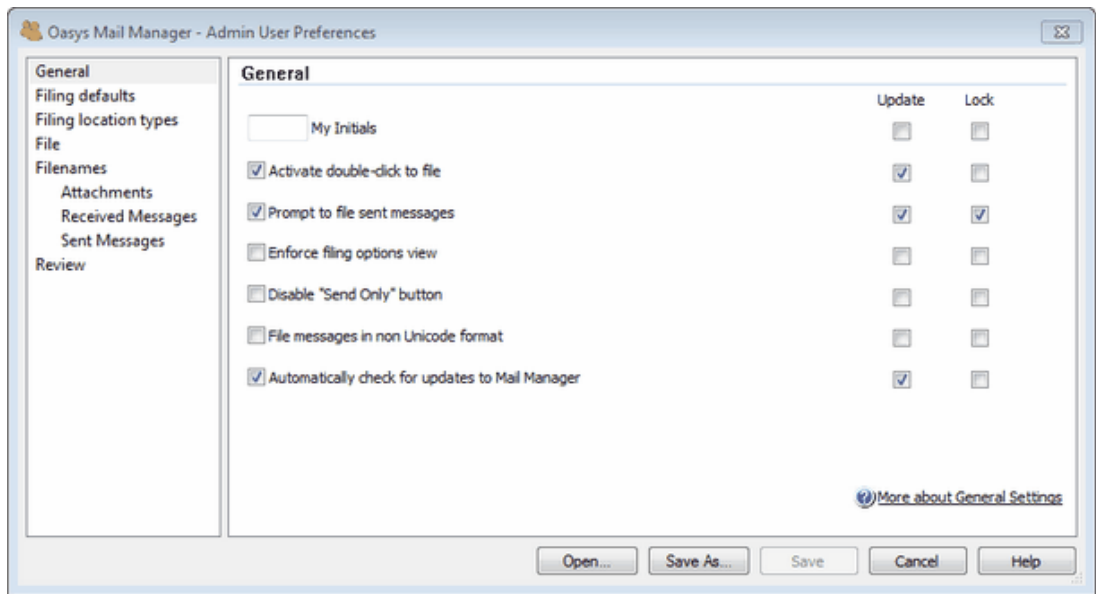
1.1.3.1 Admin user preferences tool

The Admin user preferences tool is used to update the file called [AdminEmailFiling.cfg](#), which in turn will update the User preferences file ([EmailFiling.cfg](#)) when the OK button is selected.

In use:

Open the file called: **mmadminpreferences.exe** located in the in the Mail Manager installation folder.

The Admin User Preferences dialog will appear:



This dialog resembles the User Preferences dialog, but with the additional options to update and lock each feature.

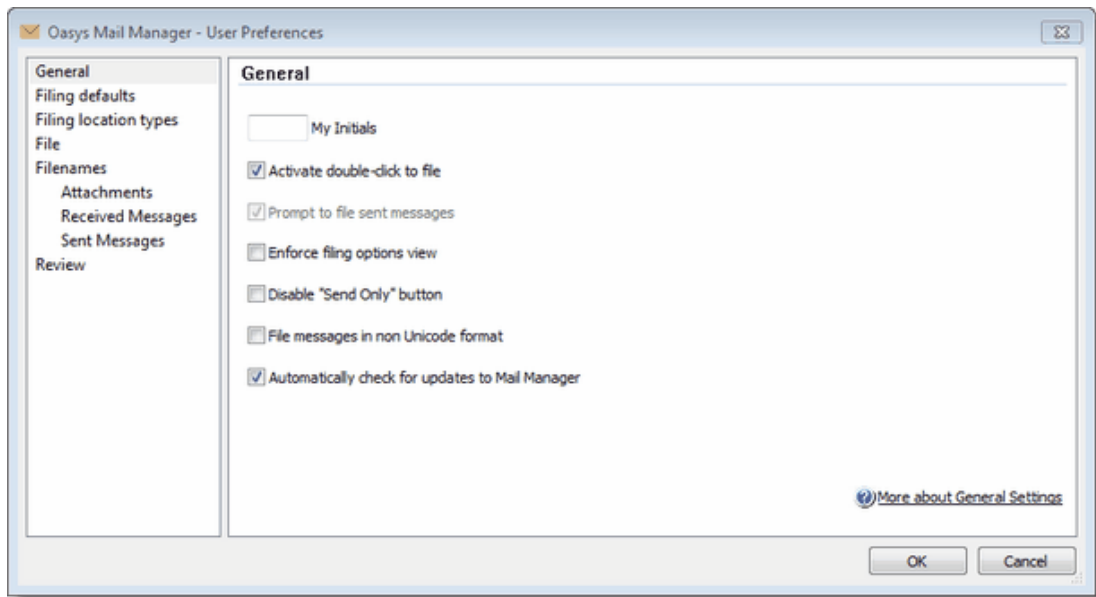
Update

Selecting the update check box for a particular feature will ensure, that feature is set and applied.

Where the update check box has not been set user's machines will not be changed.

Lock

Selecting the lock check box for a particular feature will ensure, that the feature is locked see the example "Prompt to file sent messages" below:



1.1.4 Collections.txt

The Collections.txt is used to centrally pre-populate Collection files used by Mail Manager. It needs to be located in the "[Network Configuration Folder](#)".

Use a plain text editor e.g. Notepad to edit the Collections.txt file.

File format:

1. Lines beginning with ; will be ignored by Mail Manager (used for comments)
2. Valid keyword sections are: [remove], [add on], [add off] & [remove local locations]
[remove] = will remove specified Collections from users installations of Mail Manager
[add on] = will add and switch on specified Collections from users installations of Mail Manager
[add off] = will add but switch off specified Collections from users installations of Mail Manager
[remove local locations] = will remove specified person locations i.e. not derived from a Collection
3. Specify only one .mmcollection per line. If no path is specified it is assumed the Collection file is located in the same folder as the Collections.txt file
4. Keyword sections can contain multiple lines
5. % can be used as a wildcard

A sample file can be found in the Mail Manager installation folder e.g. **Sample Collections.txt**

Installation

Part




2 Installation

Oasys Mail Manager is a general purpose email message filing tool, implemented as a client application add-on to Microsoft Outlook and BlackBerry mobile devices. No server components are required to be installed

Mail Manager for Outlook can be installed via any of the following methods:

- Manually running the MSI on each PC or
- Deploying to multiple PC's using one of the following methods:
 - Group Policy
 - Microsoft's System Management Server (SMS)
 - Microsoft's System Center Configuration Manager (SCCM)

 Whichever of the above methods is used, installation will require administrative permissions.

2.1 Prerequisites

Personal Computer or Laptop

Operating Systems:

- **Supported:** Windows 7 (32-bit and 64-bit), Windows Vista (32-bit and 64-bit), Windows XP (32-bit and 64-bit)
- **Un-tested but should work:** Server and tablet versions of MS Windows

Microsoft Outlook:

- Microsoft Outlook 2003, 2007 or 2010 32-bit version. Outlook 2010 64-bit version is not currently supported.
- The latest Microsoft Outlook service packs and hot fixes for each version.

Other requirements:

- Microsoft .NET Framework 2.0 or above.
- Installation requires administrative permissions

BlackBerry mobile phones (optional)

- Version 4.2 or later of the BlackBerry operating system (O.S.)

2.2 Single PC installation

Mail Manager can be installed on a single PC basis by installing the msi file. Installation requires administrative permissions.

Once installed it can be configured to suit your requirements via the User preferences options.

To license the software use the Manager Keys feature i.e.

- Via the Windows **Start** button select **All Programs > Oasys Mail Manager 5.0 > Manage Keys**
- Select the **Activate key** button and enter your **Key ID** and **Password**

2.3 Multiple PC installations

The Mail Manager msi file can be pre-configured for deployment to multiple PC eliminating the need to enter the activation details each time the software is installed. Also by using a "Network Configuration Folder" you are able to update users preferences at anytime without reinstalling Mail Manager. For more information see:

- [Setup](#)
- [Install from a network folder](#)
- [Deploy using Microsoft Group Policy Objects \(GPO\)](#)

2.3.1 Setup

Step 1: Single PC installation

- Perform a [single PC installation](#) and license the software using the Manager Keys feature.

Step 2: Create and setup a Network Configuration Folder

- Create a network folder that all users have read access to e.g. J:\Oasys.
The Network Configuration Folder is used to control the following:
 - **User Preferences** via an AdminEmailFiling.cfg located in the folder.
 - **Shared filing locations** via a Collections.txt file located in the folder.



Set the Windows folder and file permissions on Network Configuration Folder so that they are read only to normal users, but writeable to those users who administer control over users preferences and collection files

Step 3: Copy an AdminEmailFiling.cfg in the Network Configuration Folder

- Copy the default AdminEmailFiling.cfg found in the installation folder to the Network Configuration Folder and edit as required using the [Admin user preferences tool](#). If migrating from version 5.0 or below, copy your current AdminEmailFiling.cfg into the Network Configuration Folder and review using the [Admin user preferences tool](#).

Step 4: Create a Collections.txt file in the Network Configuration Folder

(optional)

- If using shared filing locations (.mmcollection files) you can control which collection files are used by Mail Manager. For more information see [Collections.txt](#)

Step 5: Configure the Mail Manager installation MSI file for deployment

- Copy the downloaded Mail Manager application MSI file to a network folder e.g. J:\Oasys\Deploy.
- Open the file called MsiConfigure.exe found in the Oasys folder in ...Program Files**Common Files** (typically C:\Program Files\Common Files\Oasys). Alternatively the msi can be installed using [command line options](#).
- Enter the path to the Mail Manager MSI file that you copied to the network folder e.g. J:\Oasys\Deploy\Oasys_MailManager_5_1_0_34.msi.
- Enter the activation details. Note the Key ID and Password are both case-sensitive.
- Enter the path to the Network Configuration Folder (as in **Step 2** above) e.g. J:\Oasys.
Note: The path to the Network Configuration Folder is stored in the Windows registry i.e.

Windows 32-Bit:

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Oasys\Mail Manager]
"Master Config Folder"="J:\\Oasys"
```

Windows 64-Bit:

```
[HKEY_LOCAL_MACHINE\SOFTWARE\Wow6432Node\Oasys\Mail Manager]
"Master Config Folder"="J:\\Oasys"
```

- If required provide a path to an [Alternate Welcome Page](#) e.g. <file:///J:/Oasys/welcome.html> or <http://intranet.oasys.com/mm/welcome>
- Select the **Apply** button to save configuration details to the msi file. Note write access to the msi file will be required.

2.3.1.1 MSI command line options

Properties that can be set on the msi installation command line:

MASTERADMINCONFIG

Creates and sets a registry key containing the folder where your master AdminEmailFiling.cfg is located.

When Mail Manager starts, if this registry key is set and a file called AdminEmailFiling.cfg is present in the folder, it will be copied to the machine's "All Users" application data area.

When the file in the master folder is updated it will automatically update the AdminEmailFiling.cfg file on users machines. The next time the users open Outlook their User preferences will have been updated.

Example:

```
msiexec /i "J:\Oasys\Oasys_MailManager_5_0_1_40.msi" MASTERADMINCONFIG="J:\oasys"
```

ACTIVATIONKEYID and ACTIVATIONPASSWORD

Allows the activation Key ID and password to be set during installation. When Mail Manager subsequently runs the software will attempt to automatically activate if it has access to the internet.

Example:

```
msiexec /i "J:\Oasys\Oasys_MailManager_5_0_1_40.msi" ACTIVATIONKEYID=12345678
ACTIVATIONPASSWORD=myspassword
```

WELCOMEPAGE

Sets the start page for the "Welcome to Mail Manager" screen, if this is set, the standard Oasys welcome content will not be installed. The value can optionally be quoted, it can be an <http://>, <file://> or just a drive letter or UNC notation filename. Basically, anything that you can type in the IE navigation bar. It will also use the IE proxy settings.

Example:

```
msiexec /i "J:\Oasys\Oasys_MailManager_5_0_1_40.msi" WELCOMEPAGE="http://www.google.com"
```

An example using all of the command line options:

```
msiexec /i "J:\Oasys\Oasys_MailManager_5_0_1_40.msi" MASTERADMINCONFIG="J:
```

```
\oasys" ACTIVATIONKEYID=12345678 ACTIVATIONPASSWORD=myspassword
WELCOMEPAGE="http://www.google.com" /passive
```

2.3.1.2 Admin user preferences tool

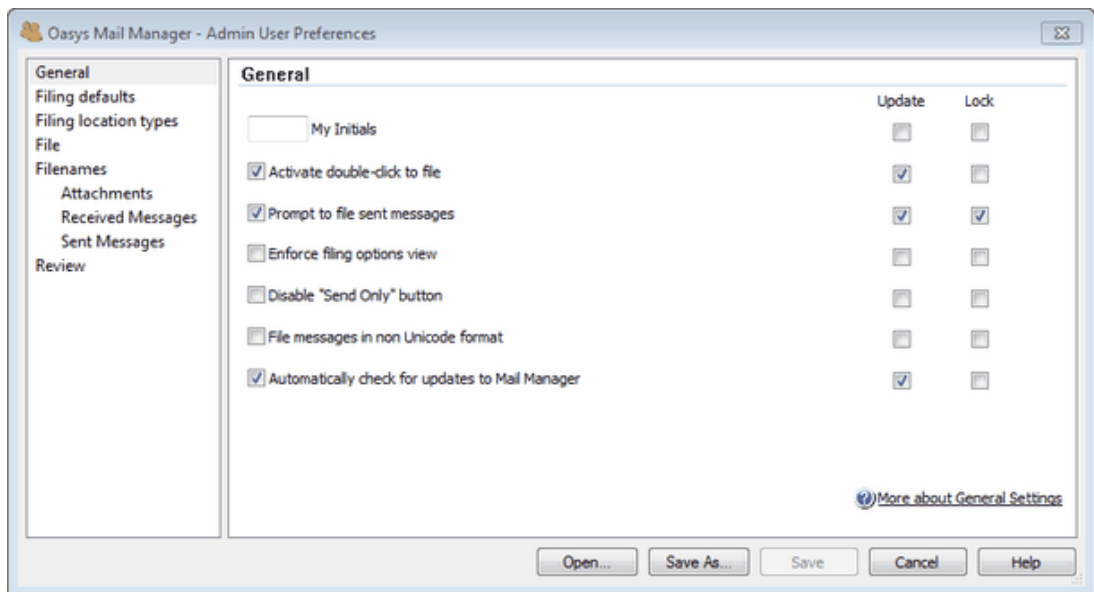
Why use the Admin user preferences tool?

The Admin user preferences tool is used to update the file called [AdminEmailFiling.cfg](#), which in turn will update the User preferences file ([EmailFiling.cfg](#)).

In use:

Open the file called **MMAdminPreferences.exe** found in the Mail Manager installation folder (typically C:\Program Files\Oasys\Mail Manager).

The Admin User Preferences dialog will appear:



This dialog resembles the User Preferences dialog, but with the additional options to update and lock each feature.

Open and navigate to the file called AdminEmailFiling.cfg located in the Network Configuration Folder.

Edit each of the features as required. When complete choose the **Save** button. Any changes will be applied immediately to all users that have been setup to use the same Network Configuration Folder.

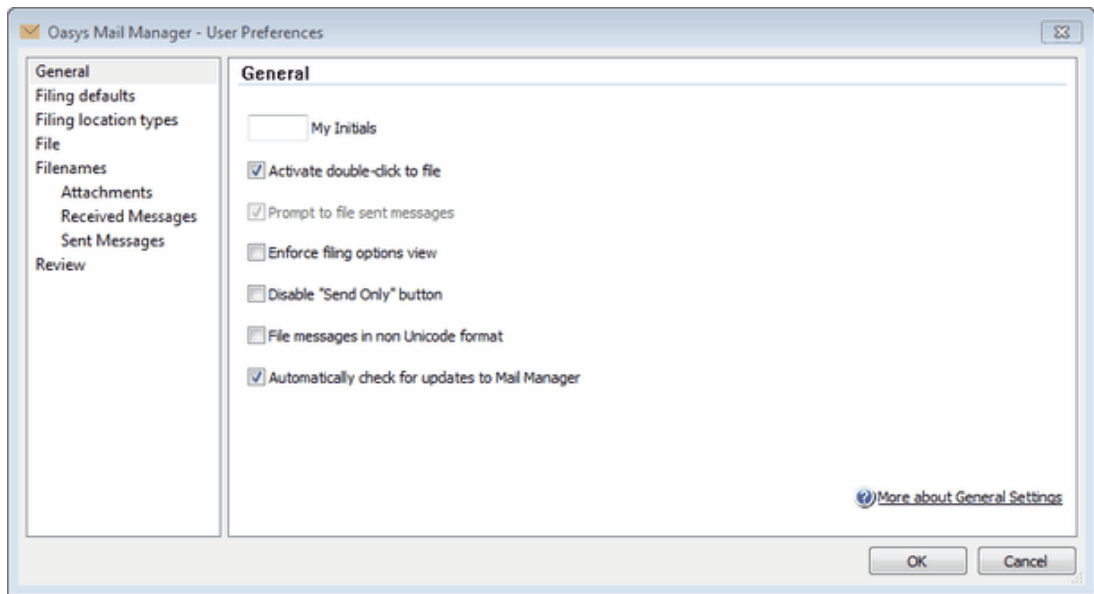
Update

Selecting the update check box for a particular feature will ensure, once deployed, that the next time the user opens Outlook the new setting for that feature will be applied.

Where the update check box has not been set, users machines will not be changed.

Lock

Selecting the lock check box for a particular feature will ensure, the next time the user opens Outlook that feature is locked as the example below:



2.3.1.3 Alternate welcome page

Sets the start page for the "Welcome to Mail Manager" screen, if this is set, the standard Oasys welcome content will not be installed. The value can optionally be quoted, it can be an http://, file:// or just a drive letter or UNC notation filename. Basically, anything that you can type in the IE navigation bar. It will also use the IE proxy settings.

2.3.2 Install from a network folder

- Ensure that the logged in user has sufficient user permissions to execute the msi file and install the software.
- Ensure Outlook is not running.
- Navigate to the network folder e.g. J:\Oasys\Deploy and run the msi file.

2.3.3 Deploy using Microsoft Group Policy Objects (GPO)

Move the configured Mail Manager msi file from the network configuration folder e.g. J:\Oasys\Deploy to an appropriate distribution point on the publishing server.

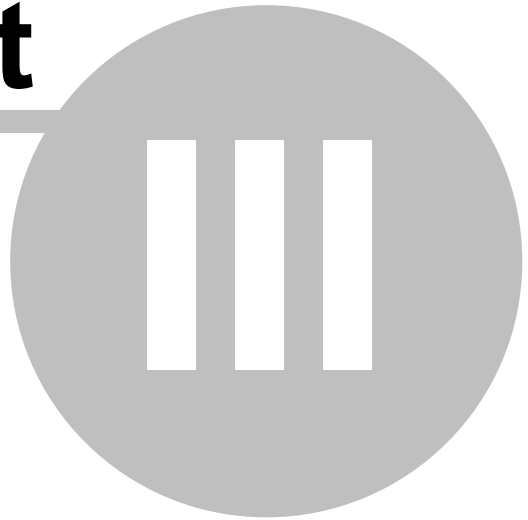
It is beyond the scope of this document to give detailed instructions on the use of Group Policy. Please refer to the documentation provided with the appropriate software for help.

Useful links:

- [Deploying a MSI through GPO](#)
- [Deploying a Managed Software Environment](#)
- [Group Policy Frequently Asked Questions \(FAQ\)](#)

Filing locations

Part



3 Filing locations

Filing locations are folders where messages are filed to. There are two methods to add filing locations i.e.

Collections

- Files that contain a list of filing locations (.mmcollection)
 - A Collection can be saved to a network folder and shared with multiple users
 - Multiple Collection files can be used
 - Collection manage and editor tools are provided to quickly add or edit multiple filing locations
- [More about Collections](#)

Personal locations

- Only available to the user and the PC that was used to create them.
 - Personal locations can be [exported and imported](#) for backup purposes
- [More about Personal Locations](#)

3.1 Collections

About Collections

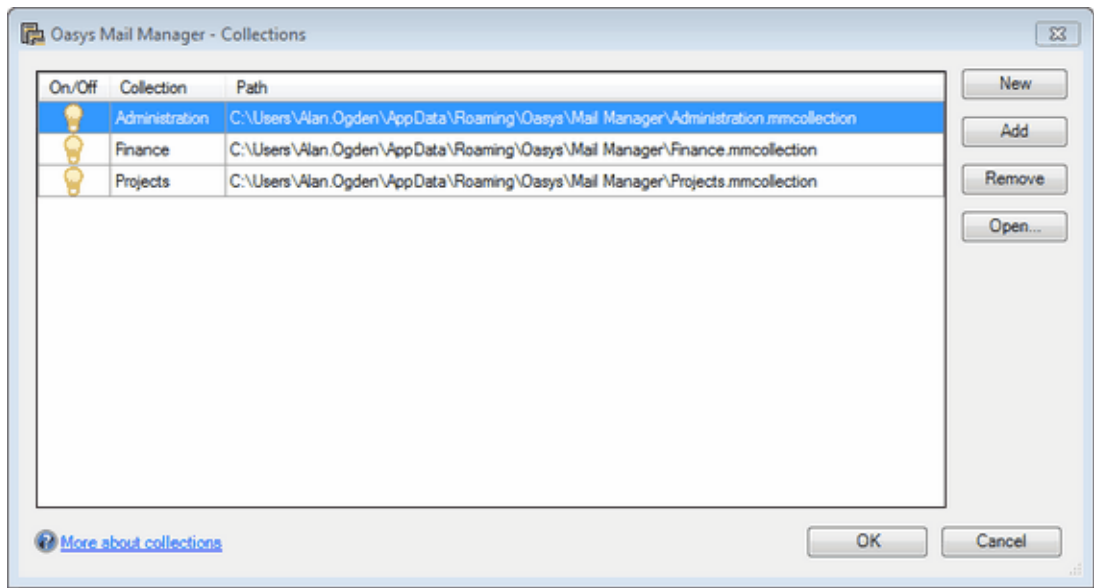
- A Collection file (.mmcollection) contains filing locations e.g. description and path
- The [Collection Editor](#) is used to add/edit filing locations in a Collection file
- A Collection can be saved to any file system folder and used by multiple users
- The name of the Collection is displayed when filing and searching for messages
- When a Collection is updated the changes are synchronised with all users
- The [Collections manager](#) is used to load Collection files into Mail Manager
- Optionally a [Collections.txt](#) can be used to control which Collection files are used by Mail Manager

3.1.1 Collections manager

Collection files are added to Mail Manager using the Collections manager.

In use:

From the Mail Manager toolbar select **Tools > Collections...**



New

Select the **New** button to create and add a collection. When prompted select a name for the collection and the folder where it will be saved. The Collection Editor will open and allow you to add filing locations. See [Collection Editor](#) for more information.

Add

Select the **Add** button to add an existing collection. One the new line select the **Browse** button and navigate to the required collection file.

Remove

To remove a collection from your Mail Manager select the collection to be removed and choose the **Remove** button.

Note: Removing the collection from your Mail Manager will not delete the collection file.

Open

To open a collection for editing etc. select the required collection and choose the **Open...** button.

The collection will be opened in the Collection Editor.

On/Off

Rather than removing a collection you can choose not to display any of the filing locations from a collection.

Select and toggle the light bulb icon to suit.

Edit Path

To manually edit the path of a collection in the event that its folder has changed, double-click in the path field.

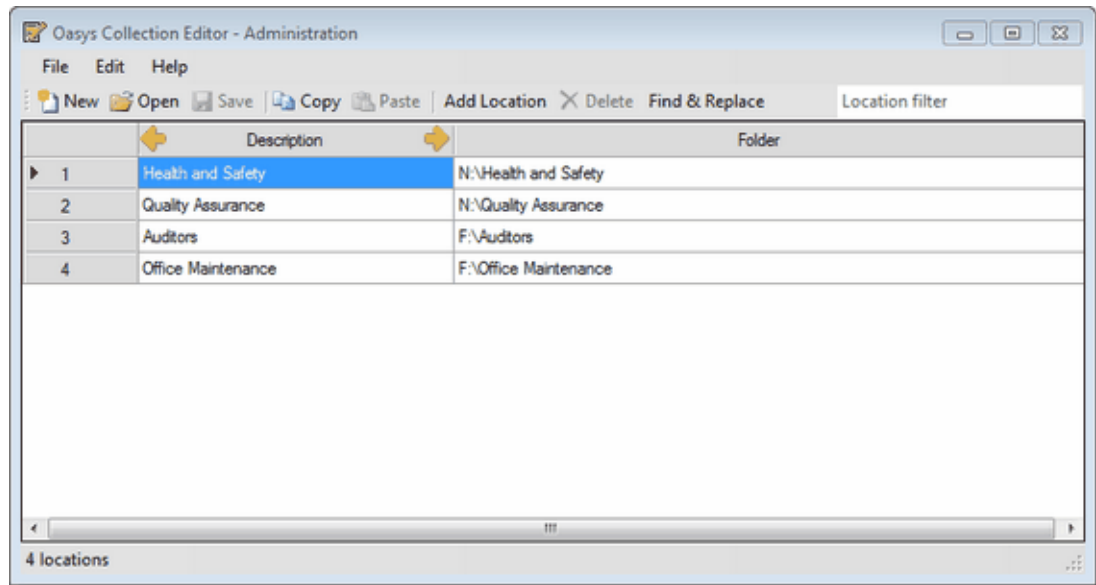
3.1.2 Collections Editor

Collection files are created and edited using the Collection Editor.

How to open a collection:

Collection files can be opened in several ways i.e.

- From Windows Explorer double-click a file with the extension of .mmcollection
- Using the **Open...** button from the [Collection manager](#) dialog
- From the File message dialog select a filing location associated with a collection, right-click and choose Open Collection...



How to add filing locations:

Filing locations can be added to a collection in several ways i.e.

- From the toolbar select Add Location when prompted browse to the required folder and choose the **OK** button. The location will be added to the end of the list.
- Select an existing location, right-click and choose Add Location... The location will be added before the location that was selected.
- Drag and drop folder/s directly from Windows Explorer

Column header

- Select the "Description" or "Folder" column header to sort the list
- Right-click on the "Description" or "Folder" column header to select all the items in the column
- Select the Row number column header to select all

Find & Replace

Selected items can be edited using Find & Replace

Edit a folder

To manually edit the folder of a filing location, double-click in the folder field.

Descriptions

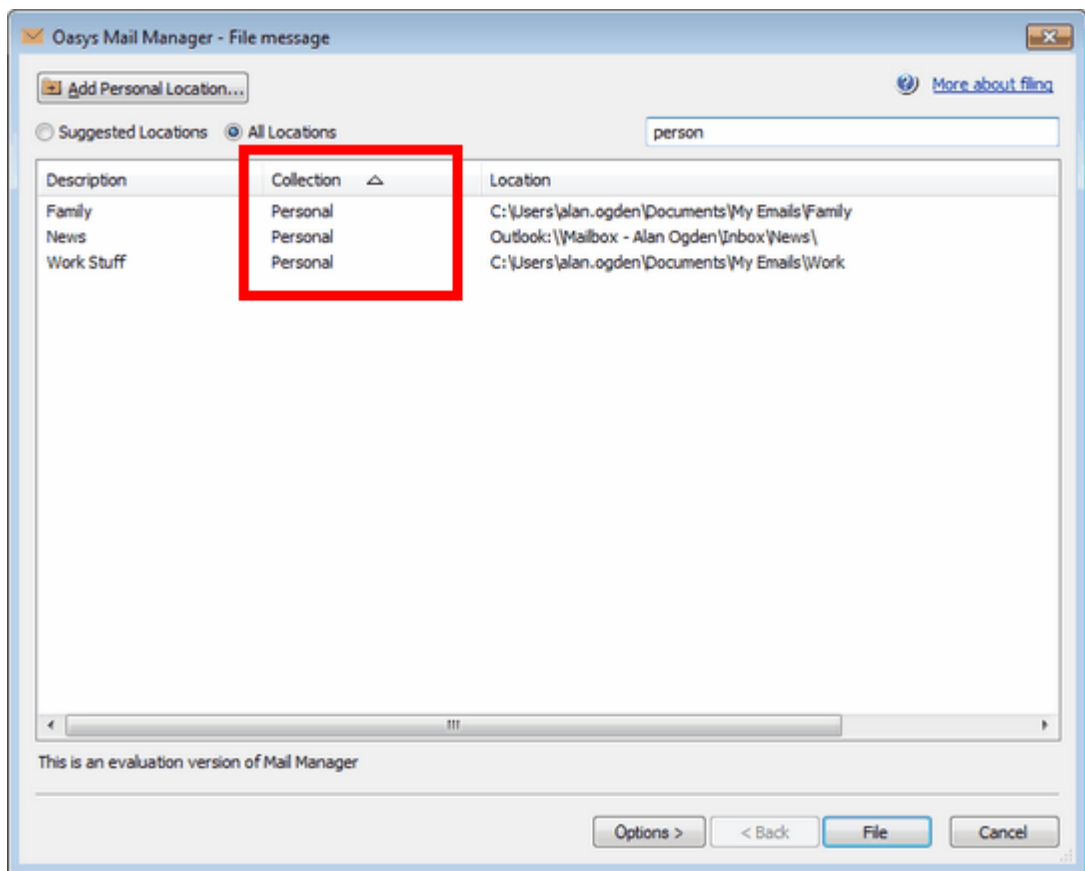
The value of the description can be changed using the left and right arrows on the column header.

Limitations:

Can not browse to Outlook folders. When required manually add the path to an Outlook folder.

3.2 Personal locations

Personal Locations can be identified by the name "Personal" listed in the Collection column:

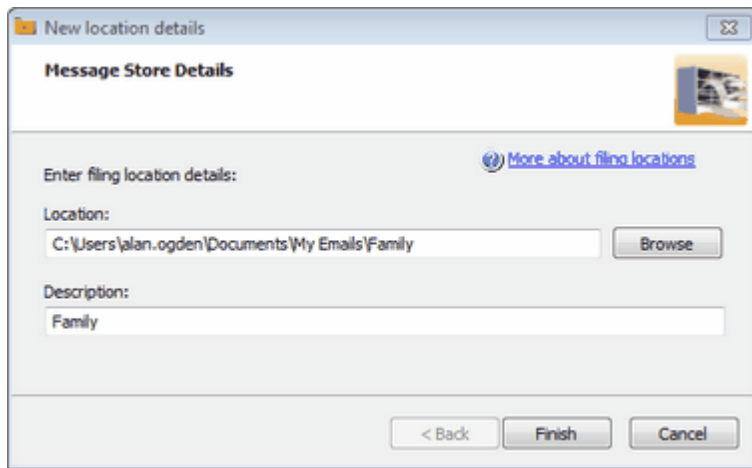


Personal filing locations can be created in several different ways:

Method 1:

Using the "Add Personal Location..." button

From the "File message" dialog select the "Add Personal Location..." button. The New location wizard will appear. If available choose the type of folder, either a "file system" or "Outlook" folder then select the "Next" button. The "New locations details" dialog will appear.



Use the **Browse** button to select the required file folder. Enter a description (mandatory) then select the **"Finish"** button.

Method 2:

Using the right-click "New" option.

From the "File message" dialog choose an existing location where the collection is called Personal. Use the mouse right-click button and select **"New"**. The New location wizard will appear. If available choose the type of folder, either a "file system" or "Outlook" folder then select the **"Next"** button. The "New locations details" dialog will appear.

Select the **Browse** button to select the required folder. Enter a description (mandatory) then select the **"Finish"** button.

Method 3:

Using the right-click "Copy" option.

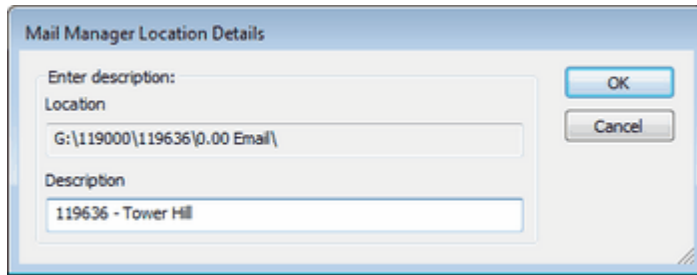
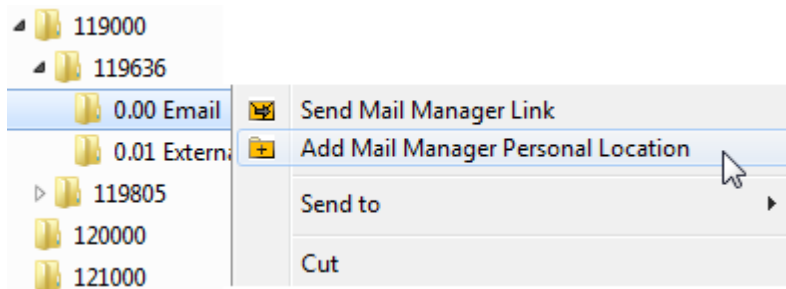
From the "File message" dialog choose an existing location where the collection is called Personal. Use the mouse right-click button and select **"Copy"**. The "New locations details" dialog will appear.

Select the **Browse** button to modify the required folder. Modify the description (mandatory) to suit then select the **"Finish"** button.

Method 4:

Using the right-click "Add Mail Manager Personal Location" from Windows Explorer.

The selected folder will be added to the locations list in the File message and Search dialogs. Outlook must be open to use this feature.




Enter a description (mandatory) then select the "OK" button.

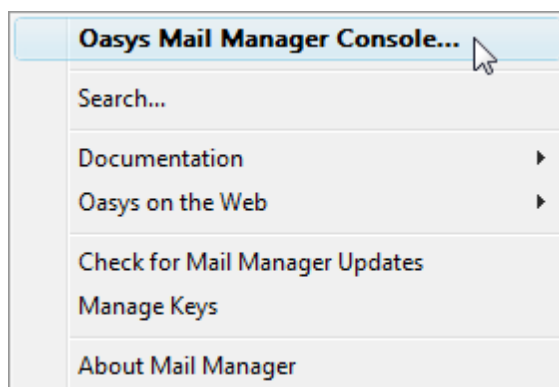
3.2.1 Import/Export personal locations

An import feature allows personal locations to be imported to another PC.

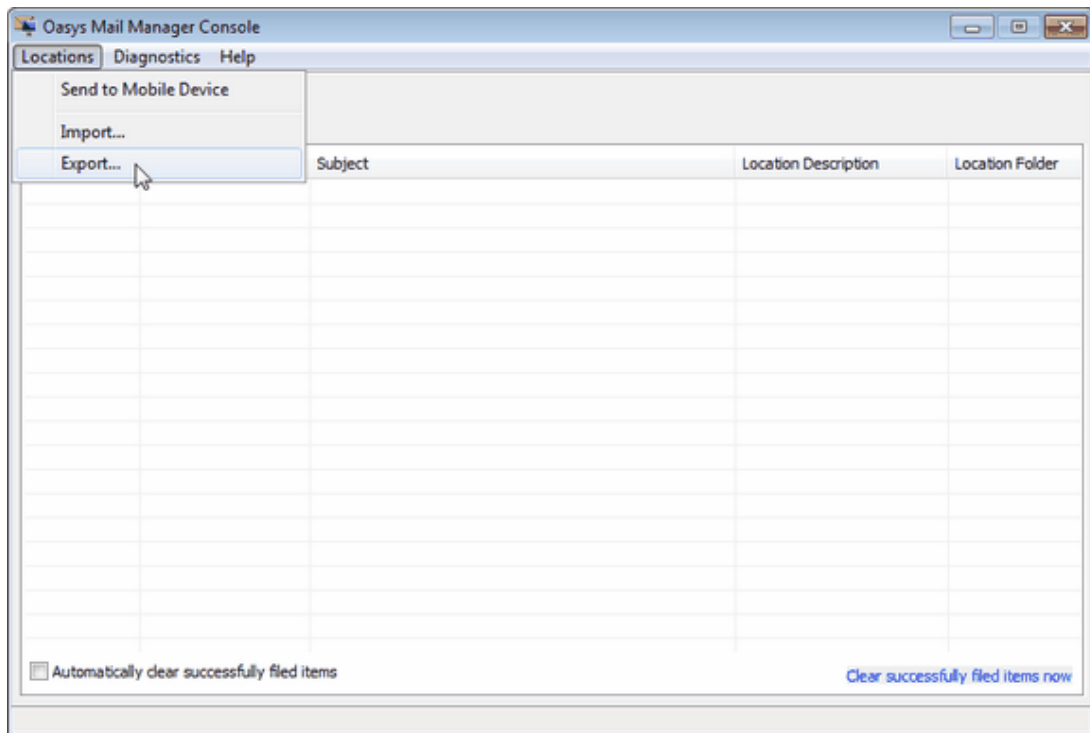
Export personal locations:

Personal locations can be exported to a file for backup purposes. The file extension used is .mmbackup.


- From the Windows System Tray of the PC select the Oasys Mail Manager icon  and choose "Oasys Mail Manager Console..."



- From the Console dialog select the drop-down menu item called: "Locations" and then select "Export..."




- When prompted **Browse** to a folder, provide a name for the file and then choose **OK**.

 When the "Include suggestions" is selected any suggested locations information will also be exported and used by others.

Import personal locations:

Personal locations can be imported to another PC

- From the Windows System Tray of the PC select the Oasys Mail Manager icon  and choose "Oasys Mail Manager Console..." (as above)
- From the Console dialog select the drop-down menu item called: "**Locations**" and select "**Import...**"
- When prompted select the required .mmbackup file to import and choose the **Open** button. The locations will now be available.

3.3 Filing location FAQ's

Can I transfer my "Personal locations" to another PC?

Yes. See: [Import/Export personal locations](#)

Can I import someone else's personal locations?

Yes, but consider using [collections](#) because they can be updated and synchronised between users more easily.

Can I migrate my "Personal locations" to a Collection?

Yes. [Export](#) your existing personal locations to a .mmbackup file.

Then using the Collection Editor open, edit and save as a .mmcollection file.

To avoid seeing duplications use a new MailManager.mdb e.g. Exit Outlook, rename the MailManager.mdb file, restart Outlook and use the Collection manager to add your new collection file.

