

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.

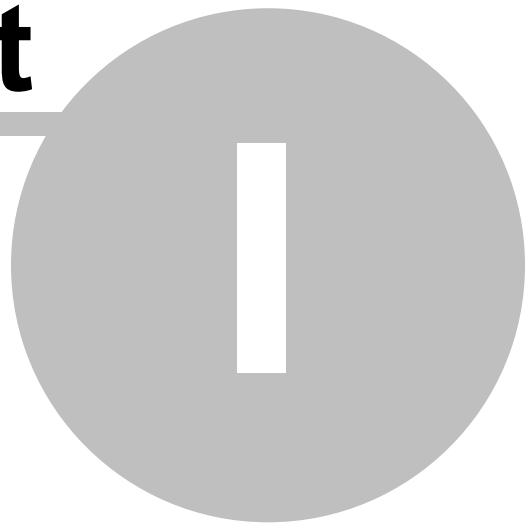
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Implementation guide

Part



1 Implementation guide

1. The following 5 key steps provide a quick overview of how to implement Mail Manager throughout your office:

- Review configuration options
- Review your email filing procedures
- Setup the default user preferences
- Deploy Mail Manager
- Provide user training

Review Mail Managers configuration options

- User preferences are controlled via the Admin user preferences tool.
- [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 next time they open Outlook.

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
- Automatically delete filed emails from the user's inbox by default
- Use the Mail Manager Send a link option rather than forwarding emails

Setup the default user preferences

- Use the [Admin user preferences tool](#) from the **Tools > Administration** > drop down menu on Mail Manager Toolbar. Wherever possible use the defaults.
 - Use the lock feature to prevent user's changing an option
 - Use the update feature to reset user's exiting preferences

Deploy Mail Manager

- See Multiple PC installations

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 new locations – try using the right-click Add Mail Manager Filing location from Windows Explorer
 - File project-related emails to project folders
 - Explain that Mail Manager will learn where you file messages and suggest a location/s
 - Try using the “Filter displayed list” to quickly reduce a long list of locations
- Explain how existing or multiple emails can be filed using the shift and/or control keys or the Tools > File all messages in a folder
- 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 Exchange Server by reducing the storage load
 - Laptop users not connected to the network can still file, search & preview their emails whilst offline

1.1 Admin user preferences tool

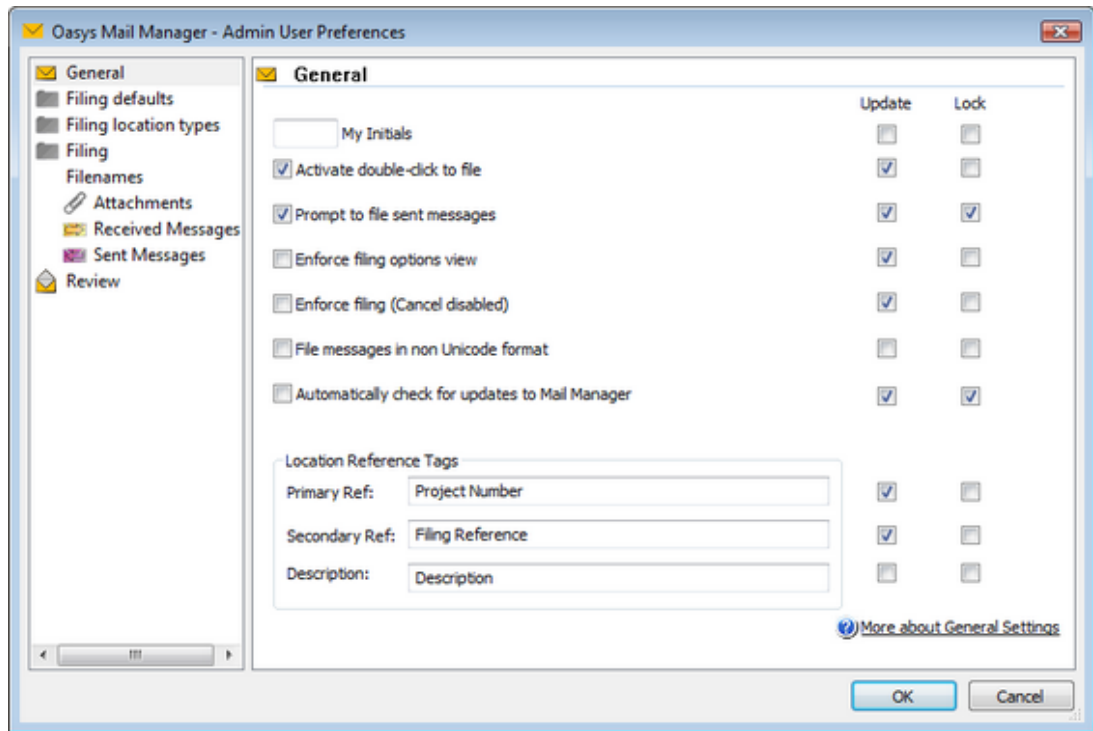
Why use the Admin user preferences tool?

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](#)) when Outlook is opened.

In use:

From the Mail Manager toolbar select **Tools > Administration > Admin user preferences tool...**

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.



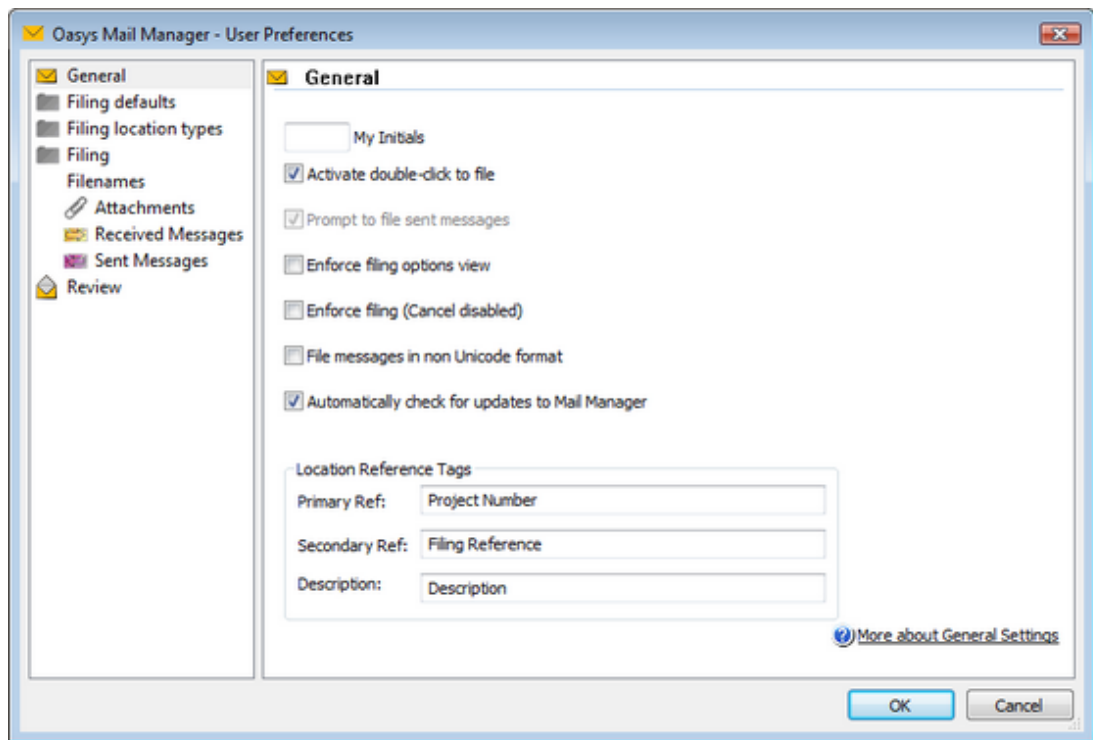
When using Windows Vista to edit and save the AdminEmailFiling.cfg file you will need modify the default user permissions to enable you to write to the folder called: C:\ProgramData\Oasys\Mail Manager

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 user's 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:



How it works:

- Selecting the OK button will update the values in the [AdminEmailFiling.cfg](#) file including a date and time value (AdminUpdateDateTime).
- When a user opens Outlook and Mail Manager loads, the date and time value in the users [EmailFiling.cfg](#) file will be compared with the one in the AdminEmailFiling.cfg file. If the value is greater in the AdminEmailFiling.cfg, the user's preferences will be overridden by those in the AdminEmailFiling.cfg where the "Update" box was checked. If the values are the same, no changes will occur.

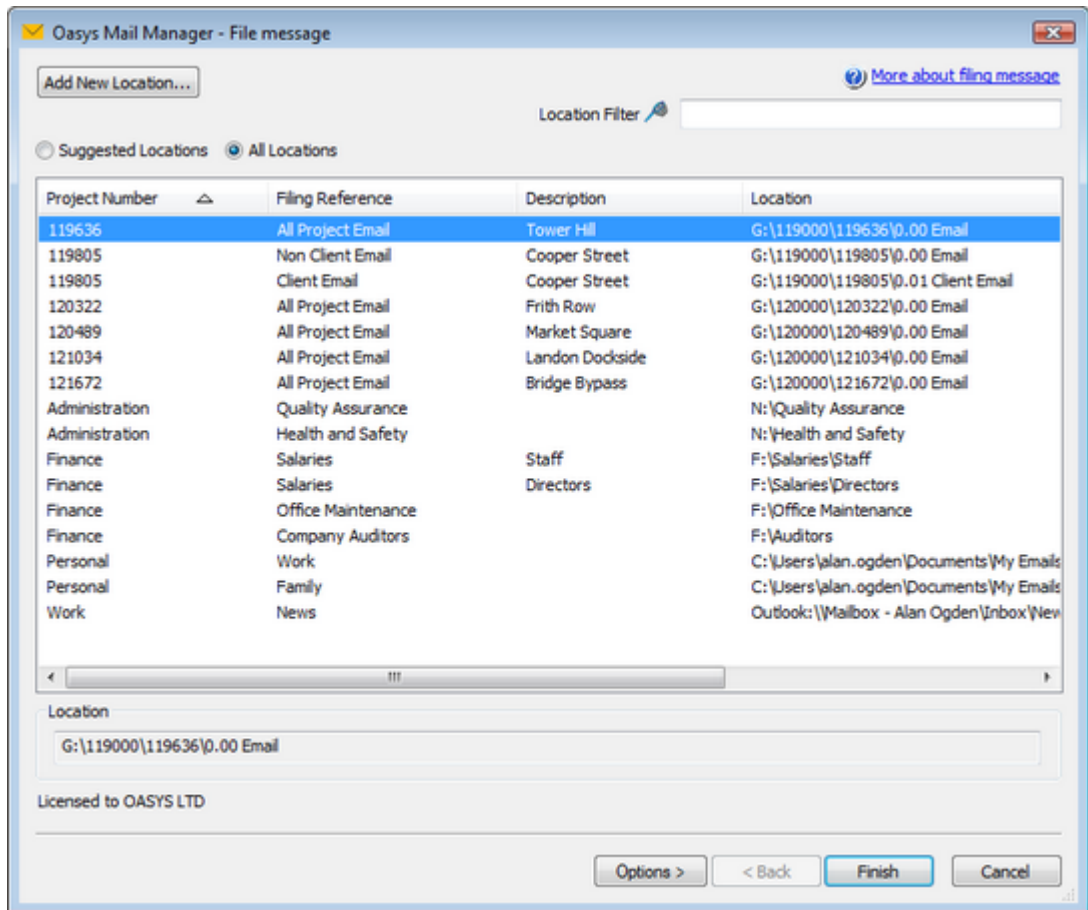
1.2 Configuration files

Mail Manager uses the following configuration files:

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

1.2.1 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 Add a new location to populate and amend the locations.



1.2.2 EmailFiling.cfg

The EmailFiling.cfg file is used to define the options in the User preferences dialog and is located in:

%userprofile%\Application Data\Oasys\Mail Manager (typically C:\Documents and Settings\\Application Data\Oasys\Mail Manager)

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

1.2.3 AdminEmailFiling.cfg

The AdminEmailFiling.cfg file is used to control the values in the [EmailFiling.cfg](#) file and is located in:

%allusersprofile%\Application Data\Oasys\Mail Manager (typically C:\Documents and Settings\All Users\Application Data\Oasys\Mail Manager\AdminEmailFiling.cfg)

Editing the AdminEmailFiling.cfg file is carried out via Mail Manager toolbar i.e. **Tools** > **Administration** > **Admin user preferences tool...**



How to remove the Administration menu:

- Before copying the AdminEmailFiling.cfg to the network folder open it using Notepad

and edit the following line:

RemoveAdmin=0 to **#RemoveAdmin=1**

How to reinstate the Administration menu for a user:

- Open the file called: %Userprofile%\Application Data\Oasys\Mail Manager**EmailFiling.cfg** using Notepad and edit the following line:
RemoveAdmin=1 to **RemoveAdmin=0**
- Exit and re-open Outlook. You should now find that the Tools > Administration menu is available.

