

# Enhanced EMM

Making email filing easier and quicker

For Filesite

## **Enhanced EMM User Manual**

**Version 1.16**

**By UC Logic**



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## 1. Support

For support, please contact [support@uclogic.com](mailto:support@uclogic.com)

## 2. Updates

Version: 1.16  
Date: 5<sup>th</sup> November 2013

Fixed an issue when the EM Outlook client Email Filing toolbar field has a value entered but the "File To" check box is unchecked and emails sometimes got filed when clicking the Send Only button.

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Version: 1.15  
Date: 19th September 2013

Added the ability to disable the task pane, or have the task pane view my matters or my favourites.  
If ShowMyMatters is set to N, then it cannot be used in the task pane  
If ShowMyFavourites is set to N, then it cannot be used in the task pane.  
Faster loading if ShowMyMatters and/or ShowMyFavourites are set to N

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Version: 1.14  
Date: 6th September 2013

Fixed issue when there is no exclusion address file causing email filing dialog to never show  
Fixed issue with the email subject tag, so the alternative database names are now used from the registry if they are defined.

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Version: 1.13  
Date: 14<sup>th</sup> August 2013

Hide Send to Favourite now working  
Empty exclude email address file no longer results in a disabled send and file dialog  
Checks list of recipients, and if a comm server address is found it disables the send and file dialog  
AddFilingLocationFix registry entry to add filing location to emails if they have a comm server email address

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Version: 1.12  
Date: 20th June 2013

Added Send and Mark as Filed with fix for performance issue  
Added Options dialog that can be accessed from Enhanced EMM ribbon bar  
Excluded email addresses now stored in text file

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Version: 1.11  
Date: 13th June 2013

Removed Send and Mark as Filed (due to performance issues with redemption.dll)

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Version: 1.10  
Date: 11th June 2013

Send and Mark As Filed now updates sent email icon and sets the Filing Status to whatever value is specified in the associated reg key (see registry settings).

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Version: 1.9  
Date: 11th June 2013

Added option to Send and Mark As Filed (see registry settings).

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Version: 1.8  
Date: 6th June 2013

Fixed NoFileText issue. Emails with a subject containing the nofiletext string will now disable the send and file dialog.

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Version: 1.7  
Date: 30th May 2013

Added option to send to My Favourites workspaces and folders (see registry settings).

Filing pane now shows default email folder with a different icon, workspaces with no default email folder are shown in grey text.

You can now send from the filing pane by selecting the workspace (as long as it has a valid default email folder) – either double click the workspace or highlight the workspace and click the send & file button.

Filing pane display status remembered from last usage

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Version: 1.5  
Date: 21st March 2013

Added registry key SendOnlyEmailAddresses to enable email addresses and domains to be specified as Send Only addresses. If all recipients match the list then the send and file dialog will be disabled. If the registry key is not present then this check will be bypassed.

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Version: 1.4  
Date: 20th March 2013

Fixed icons in task bar changing when folder selected  
Disabled send and file button in task pane if folder not selected  
Saved email subdomain server name in treenodes xml file for use when disconnected from Worksite

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Version: 1.3  
Date: 18th March 2013

Added ability to disable the send and file dialog when [nofile] text (configurable in reg) is set in subject line

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Version: 1.2  
Date: 15th March 2013

Defaults to trial mode if license reg key not found

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Version: 1.1  
Date: 4th March 2013

Set autorefresh registry default to N

When run for the first time, if there is no Worksite connection and no TreeNodes.XML file generated the application now disables the task pane send and file button and stops object not found errors from being recorded to the log file.

### 3. Installation

Installation will need to be carried out by an administrator user.

First ensure Outlook is closed.

Can be installed over previous versions (1.13 and 1.14) of this application, otherwise uninstall earlier releases.

Run the installation setup.exe package and follow instructions.

For silent installation use the following command line

```
Setup.exe /s /v" /qn"
```

#### **4. Requirements**

The Enhanced EMM product is not designed to be a replacement for the Autonomy Email Filing product (EMM Outlook). It is designed to work with this product and the Autonomy iManage Communication Server to enhance the email filing capabilities.

Requires:

Autonomy iManage FileSite 8.5/9.0

Autonomy iManage Communication Server 8.5/9.0

Microsoft Outlook 2007/2010

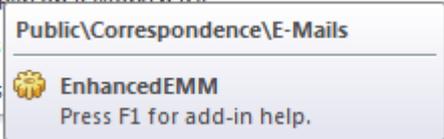
#### **5. Features**

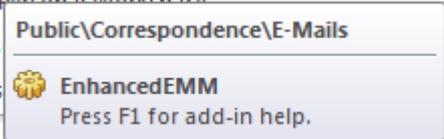
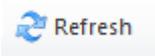
- Send and file directly to personal workspaces or another favourite folder.
- Send and file directly to My Matter workspaces or My Favourite folders.
- Send Only functionality to just send an email.
- Integrated My Matters task pane to select individual filing folders.
- Still retains standard email filing toolbar and dialogs if required.
- Customisable buttons can be hidden if not required.
- All email filing still performed by standard Autonomy Worksite software.
- Users can still select to file emails even when not connected to Worksite system.
- Ability to specify an alternative default email folder

## 6. Usage

The Enhanced EMM is presented as an additional set of buttons on the new email ribbon bar. These only appear when composing a new email or replying to an existing email.



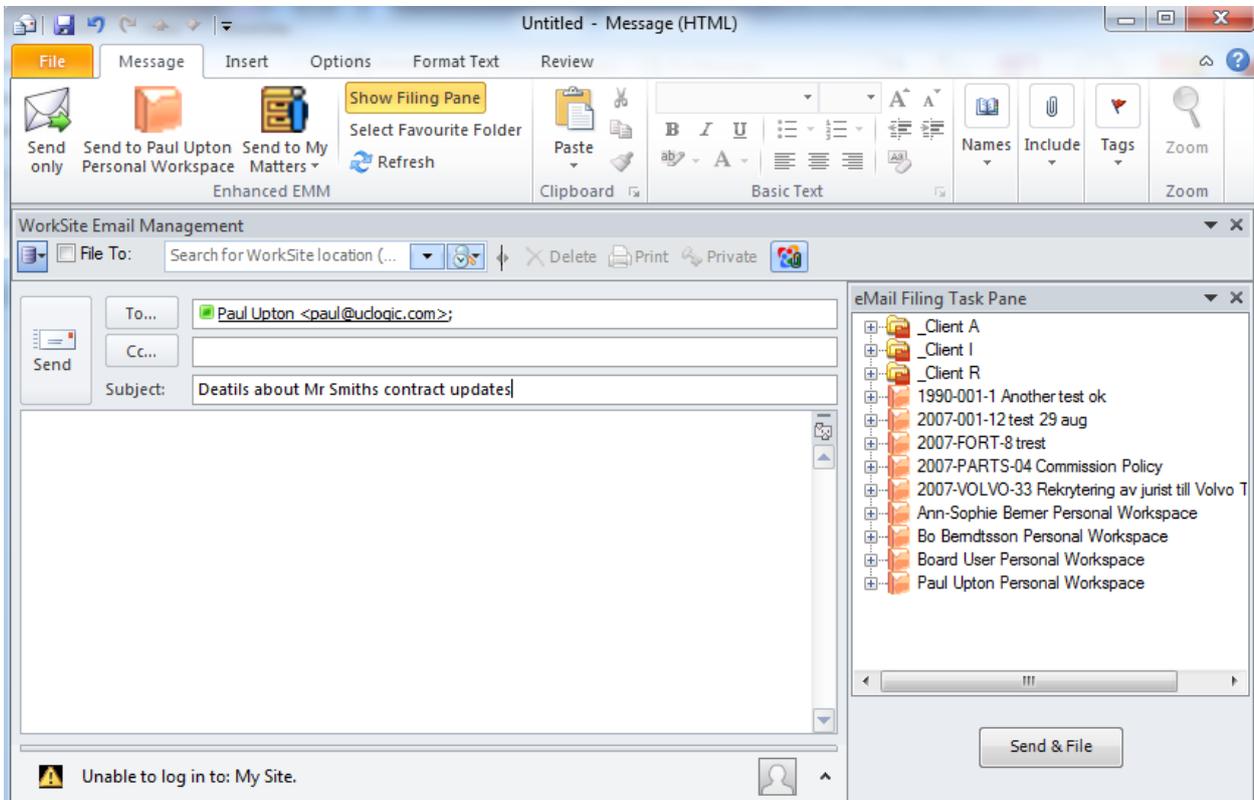
 <p>Send only</p>	<p>The Send only button is used to just send an email immediately without being prompted with the usual send and file dialog. Any existing email filing addresses or email filing subject tags will be removed before the email is sent.</p>
 <p>Send and Mark as Filed</p>	<p>The Send and Mark as Filed button is used to send an email without displaying the send and file dialog, and marking the sent email as filed. This should only be used when the email is being automatically filed by a third party application</p>
 <p>Send to Paul Upton Personal Workspace</p>	<p>The Send to Favourite button can be configured to point to a specific favourite by using the “Select Favourite Folder” button. This will be disabled the first time a user uses the Enhanced EMM add in, but will become enabled after they select a favourite folder.</p> <p>If the user hovers the mouse of the button a quick tip will show the folder that will be used for the filing</p> 
 <p>Send to my favs</p>	<p>The Send to My Favourites button displays a drop down of the workspaces and folders that the user has placed in the My Favourites folder.</p> <p>Sending an email to one of these will automatically send it to the default email folder as defined by the Autonomy client. An additional default email folder can be configured (see Configuration settings section in this manual).</p> <p>If the user hovers the mouse of the button a quick tip will show the folder that will be used for the filing</p> 

	<p>The Send to My Matters button displays a drop down of any workspaces and categories configured in the users My Matters folder. Sending an email to one of these will automatically send it to the default email folder as defined by the Autonomy client. An additional default email folder can be configured (see Configuration settings section in this manual).</p> <p>If the user hovers the mouse of the button a quick tip will show the folder that will be used for the filing</p> 
<p>Show Filing Pane</p>	<p>The show filing pane button brings up a my matter task pane to the right of the email, allowing a specific folder to be selected from the users My Matters workspaces (see Task Pane section in this document)</p>
<p>Select Favourite Folder</p>	<p>Allows the user to specify which folder should be used for the Send to Favourite button</p>
	<p>Allows the user to manually refresh the My Matters list. Usually the My Matters list is set to auto refresh, but this can be disabled in certain circumstances (e.g. slow network connections) and the manual refresh button used instead.</p>
	<p>Ribbon bar callout, used to launch options dialog</p>

To use these buttons, first compose the email as normal, then instead of clicking the usual Send button, click the desired Enhanced EMM button to send the email.

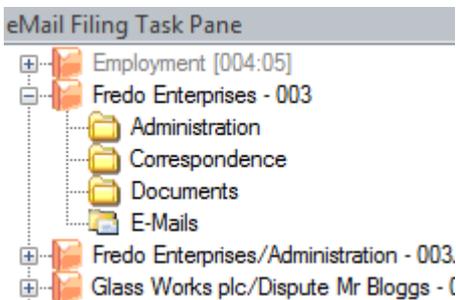
## 7. Task Pane

When the Show filing pane button is used an eMail Filing task pane open up to the right side of the email showing the My Matters or My Favourites list for the current user.



Users can view workspace folders to select a specific folder if they don't want to file to the default email folder as identified in the Send To My Matters button. When they have selected the folder, they can click the Send & File button to send the email.

If a workspace has a default email folder, then this folder will be displayed with a different icon



If the workspace does not have a default email folder, it will be displayed in grey text, however, you can still open and select one of the sub folders if you wish.

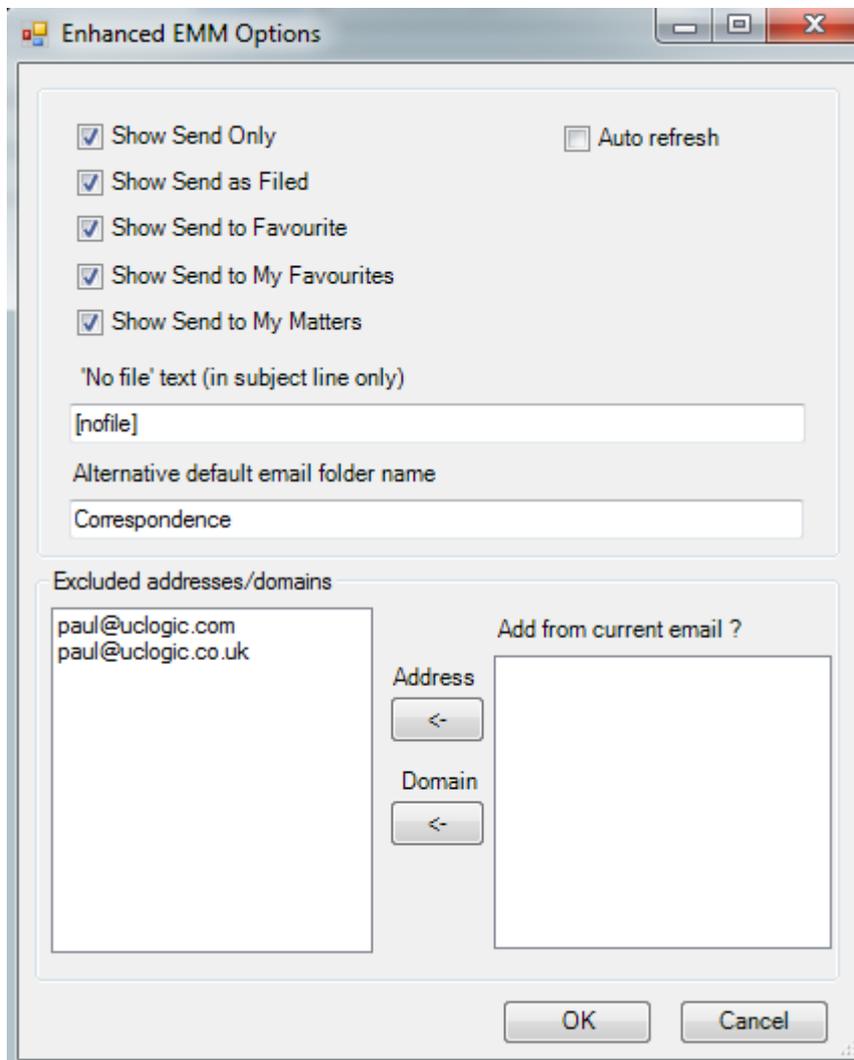
To send an email using the email filing toolbar, either select the workspace or folder and click the Send & File button, or double click on the workspace or sub folder. Please ensure you have composed and addressed your email first as this will cause the email to be sent immediately.

## 8. Using the Autonomy Send & File dialog and email filing toolbar

The normal Autonomy iManage Send & File dialog can be accessed as normal by simply clicking the Send button to the left of the address fields. The Autonomy iManage email filing toolbar can also be used should the users prefer to file emails this way.

## 9. Options

The options dialog can be opened by using the callout button in the bottom right of the Enhanced EMM ribbon bar.



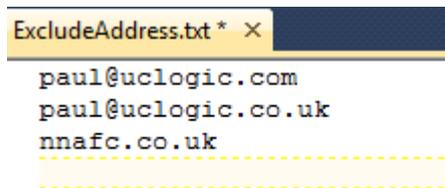
The options are used for:

- Which buttons are visible in the Enhanced EMM ribbon
- Whether to enable Auto Refresh

- The 'no file' text that will automatically disable the send and file dialog if found in the email subject line
- The alternative default email folder to look for in Workspaces
- The list of excluded email addresses and domain names to automatically disable the send and file dialog. The excluded addresses/domains list can be edited by either selecting them from the current email list, or right clicking on the list to add/edit or delete entries.

The excluded list of email addresses and domains is no longer stored in the registry, it is now in a text file located in the %appdata%\EnhancedEMM folder. The file is called ExcludeAdress.txt and can be edited using the options dialog or edited manually. Each entry should be on a separate line and only contain the smtp address or the domain name

e.g.



```
ExcludeAddress.txt * ×
paul@uclogic.com
paul@uclogic.co.uk
nnafc.co.uk
```

## 10. Configuration

The Enhanced EMM product has been designed to work without any client configuration, however, there are some customisable features that are controlled by registry settings.

The registry settings are all stored in the key

HKEY\_CURRENT\_USER\Software\UC Logic\EnhancedEMM

Name	Type	Description
AlternateEmailAddress	String	Specifies an alternative default folder name. The default email folder name as defined in the Autonomy client will be checked first, if it is not found, then this string value will then be checked  Example: <b>Correspondence</b> Default: <b>&lt;blank&gt;</b>
AutoRefresh	String	Specifies if the My Matter list is automatically refreshed whenever a new email is created  Values: <b>Y/N</b> Default: <b>N</b>
Demoid	String	Developer use only
DemoPassword	String	Developer use only
DisableEnhancedEMM	String	Disables the Enhanced EMM ribbon  Values: <b>Y/N</b> Default: <b>N</b>
FavouriteFolderName	String	Automatically entered when after using the Select Favourite folder button
FavouriteFolderTag	String	Automatically entered when after using the Select Favourite folder button
FavouriteFolderTip	String	Automatically entered when after using the Select Favourite folder button
Log	String	Specifies if a log file should be generated. The log file will be stored in %appdata%\EnhancedEMM\EnhancedEMMLog.txt  Values: <b>Y/N</b> Default: <b>N</b>

Name	Type	Description
ShowSendOnly	String	Determines if the Send Only button is visible Values: <b>Y/N</b> Default: <b>Y</b>
SendOnlyText	String	The text that appears on the Send Only button Default: <b>Send Only</b>
ShowSendAsFiled	String	Determines if the Send and Mark as Filed button is visible Values: <b>Y/N</b> Default: <b>N</b>
ShowSendAsFiledText	String	The text that appears for the Send and Mark as filed button Default: <b>Send and Mark as Filed</b>
SendAsFiledStatus	String	The text that appears in the Filing Status field for filed emails Default: <b>Filed</b>
ShowSendFavourite	String	Determines if the Send to Favourite button is visible Values: <b>Y/N</b> Default: <b>Y</b>
SendFavouriteText	String	The text that appears at the beginning of the Send to Favourite button, the rest of the text is found in the FavouriteFolderName registry key Default: <b>Send to Favourite</b>
ShowSendMyMatters	String	Determines if the Send to My Matters button is visible Values: <b>Y/N</b> Default: <b>Y</b>
SendMyMattersText	String	The text that appears for the Send to My Matters button Default: <b>Send to My Matters</b>
ShowSendMyFavourites	String	Determines if the Send to My Favourites button is visible Values: <b>Y/N</b> Default: <b>N</b>
SendMyFavouritesText	String	The text that appears for the Send to My Favourites button Default: <b>Send to My Favourites</b>
NoFileText	String	If this string is found in the email subject line, then the send and file dialog will be disabled and this string will be stripped from the subject before sending the email. Default: <b>[nofile]</b>

Name	Type	Description
FilingPaneStatus	DWORD	<p>Determines if the filing pane should be visible or not when a new email is created.</p> <p>Values:  <b>0</b> = hidden  <b>1</b> = visible</p> <p>The value is automatically updated to reflect the last status.</p>
FilingPaneData	DWORD	<p>Determines if the filing pane is enabled and which set of folders to display.</p> <p>Values:  <b>0</b> = disabled  <b>1</b> = display My Matters (unless ShowMyMatters is set to N)  <b>2</b> = display My Favourites (unless ShowMyFavourites is set to N)</p> <p>If both ShowMyMatters and ShowMyFavourites are set to Y then to show My Matters in the task pane set this to 1, to show My Favourites, set this to 2</p> <p>If only 1 of ShowMyMatters or ShowMyFavourites is set to Y, then this value can be set to either 1 or 2 as it will only show the enabled folders.</p> <p>If both ShowMyMatters and ShowMyFavourites are set to N, then the task pane is disabled by default.</p> <p>You cannot have the task pane show both My Matters and My Favourites (future enhancement).</p> <p>Default = 1</p>
AddFilingLocationFix	String	<p>Determines if the filing location and filing status should be added by the Enhanced EMM application if a communication server email address is found in the email.</p> <p>Values: <b>Y/N</b>  Default: <b>N</b></p>

## 11. Example registry settings

Name	Type	Data
(Default)	REG_SZ	(value not set)
AddFilingLocationFix	REG_SZ	N
AlternateEmailFolder	REG_SZ	Correspondence
AutoRefresh	REG_SZ	N
DemoID	REG_SZ	
DemoPassword	REG_SZ	
DisableEnhancedEMM	REG_SZ	N
FavouriteFolderName	REG_SZ	
FavouriteFolderTag	REG_SZ	
FavouriteFolderTip	REG_SZ	
FilingPaneData	REG_DWORD	0x00000001 (1)
FilingPaneState	REG_DWORD	0x00000000 (0)
Log	REG_SZ	N
NoFileText	REG_SZ	[nofile]
SendAsFiledStatus	REG_SZ	Filed
SendAsFiledText	REG_SZ	Send as Filed
SendFavouriteText	REG_SZ	Send to
SendMyFavouritesText	REG_SZ	Send to My Favourites
SendMyMattersText	REG_SZ	Send to My Matters
SendOnlyEmailAddresses	REG_SZ	
SendOnlyText	REG_SZ	Send only
ShowMyFavouritesText	REG_SZ	Send to My Favourites
ShowSendAsFiled	REG_SZ	N
ShowSendFavourite	REG_SZ	Y
ShowSendMyFavourites	REG_SZ	Y
ShowSendMyMatters	REG_SZ	Y
ShowSendOnly	REG_SZ	Y

Computer\HKEY\_CURRENT\_USER\Software\UC Logic\EnhancedEMM